

# FY2025 E-Rate Form 471 Category 1 Workshop

Lorrie Germann, State E-Rate Coordinator

### **Training Agenda**

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- Accessing the EPC Portal Slide 8
- Entering Contracts Slide 12
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  - Cat 1 Month-to-Month Requests Slide 53
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# Filing Basics

# **Purpose of Form 471**

#### The FCC Form 471

- is filed to request discounts on eligible services.
- must be filed every year.
- must reference services that were competitively bid with an FCC Form 470 for at least 28 days, or after a request for proposal (RFP) is made publicly available, whichever is later. (Verify Allowable Contract Date posted on Form 470)
- may reference an FCC Form 470 posted in a prior funding year where such a form resulted in a multi-year contract.
- must be filed after executing contracts for contracted services, if applicable, or selecting your service provider for tariffed or month-to-month services.

#### When to File FCC Form 471

- The FCC Form 471 must be filed during a specific application window each year.
- All materials associated with the FCC Form 471 must be filed by 11:59 PM ET on or before the last day of the FCC Form 471 application filing window for the request to be considered as inside the window.
  - Form 471 Filing window:
    - Opened January 15<sup>th</sup>, 2025 (Noon EST)
    - Closes March 26<sup>th</sup>, 2025 (11:59 pm EDT)
  - Last date to file a Form 470 February 26<sup>th</sup>, 2025
     (11:59 pm EST)

# Filing FCC Form 471

- You must complete and submit the FCC Form 471 by filing the form online in EPC.
- You may file more than one FCC Form 471
  - Note: you must file separate applications for:
    - Category One (Data Transmission and/or Internet Access) including hotspots for bookmobiles and kiosks
    - The new Category One (Off-Premises) for hotspots for library patrons or students and Bus Wi-Fi for schools
    - Category Two ((Internal Connections, MIBS, and/or BMIC)).
- You may have multiple funding requests on a single Form 471 application.

# **Prerequisites**

#### Entity Profile

- The values in your applicant entity's profile had to be updated by Jan. 9<sup>th</sup>. If you find that a correction or change is needed, you may note the information on the Form 471 in the narrative of each funding request and make a RAL correction.
- The full-time enrollment and NLSP counts of the school district served by the main library location are used to calculate your discount in the EPC system.

#### Contracts

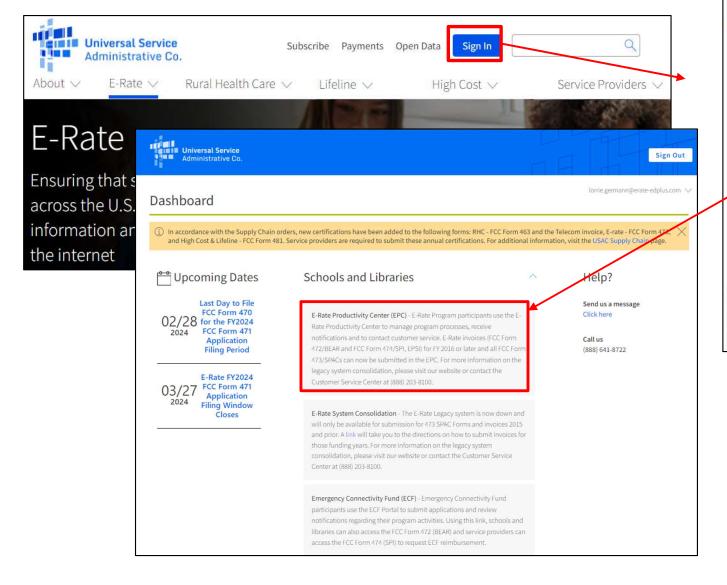
 Before you begin your application, upload contracts that you will be associating with Funding Request Numbers (FRNs) in your entity's profile, if not already in EPC.

# Accessing the EPC Portal

#### **USAC's One Portal**

Log into One Portal to access the E-Rate Productivity Center (EPC) To access, go to <a href="https://www.usac.org/e-rate/">https://www.usac.org/e-rate/</a> and click on "Sign In"

and then "Continue".



Usernan	e
Passwor	đ
Forgot p	issword?
Service pris provide purposes. of this sys the USAC with appliance per control and/or leg	terms used to administer participation in the federal Universal grams in compliance with 47 C.F.R. Part 54. Access to the systems to solely to USAC-authorized users for USAC-authorized business by logging in, you represent that you are an authorized user. Use em indicates acceptance of the terms and conditions governing systems. USAC monitors user access and content for compliance cable laws and policies. Use of the system may be recorded, read, copied and/or captured and is also subject to sodit. Unauthorized use of this system is strictly prohibited and subject to disciplinary all action.  It the box to accept
	g in, I accept the terms and conditions of the USAC

#### **Landing Page View**

Click on "USAC" logo to return to Landing Page.

Make sure all your entities are listed\*. The Library's Billed Entity Number will be listed first.

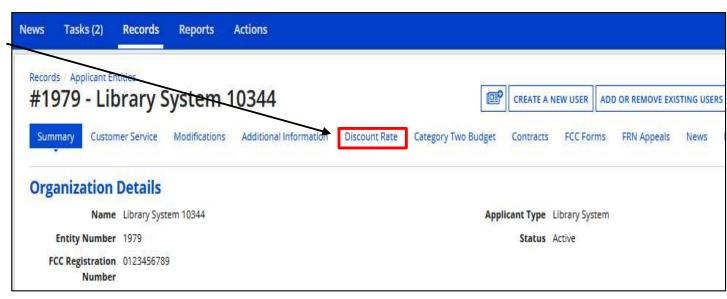
Click on the name of your Billed Entity to open the Organization Details page.

Adm	versal Service ninistrative Co				st Report   FCC Form 470 I Change   Service Subst act Us   Help					
Welcome, Library System  Pending Inquir										
Type	Select a Type			*	Application/Request	Enter an App	lication/Request	t ID or Nic	kname	
Funding Year	Select a Funding Year	Section type of					00000000000000000000000000000000000000	2455-2200-0-0-0-0	201/20/20/06	
Pending COMAD Inquiries	<u>55/)</u>	-						APPLY	FILTERS	CLEAR FILTERS
Application/Request N		Type	Nickname	Inquiry Name	Outreach Type	Date Sent	Due Date	t	Extn.	Status
Notifications  Notification Type  Funding Year				Status ②						
Notification		Description		Issued Date	Generated	Ву		Genera	ted On	
My Entities				No items	available					
Entity			Entity	Number	City		State	Zip	Code	
Library System 10344 1979		1979		Rockville		MD	208	50		
Library 1 In System 10344 3313		3313		Rockville		MD	208	50		
Library 2 In System 10	244		3314		Rockville		MD	208	En	

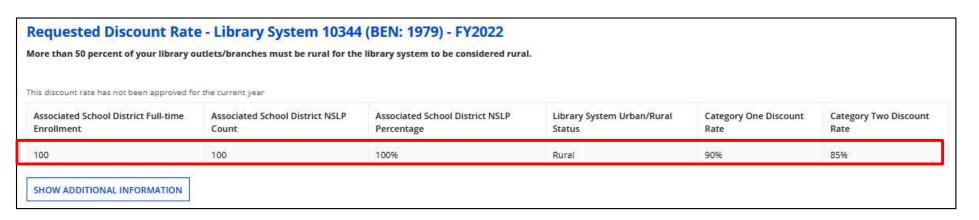
\*If there is an entity missing in the list, contact USAC to request an entity number. However, with the close of the Admin Window, the entity will not be listed in EPC until after the close of the Form 471 Window.

#### **Seeing The Library's Discount %**

Click on "Discount Rate".



Discount rates for Cat 1 and Cat 2 are listed.



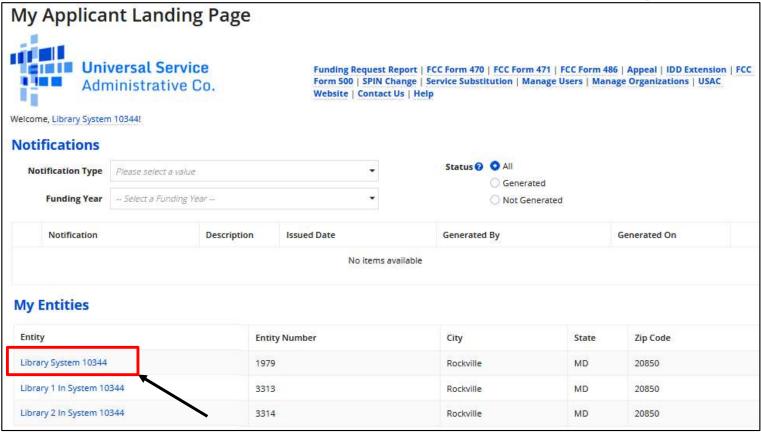
Displayed at the bottom of the "Summary" page is the total square footage that

has been provided in the portal.

The square footage is used to calculate your patron hotspot budget, as well as The Category 2 budget:

# **Entering Contracts**

#### **Manage Contracts**



You will be required to associate contracts with each FRN when requesting a contracted service. You should complete this before you begin the Form 471.

- This includes any multi-year contracts, including contracts for patron hotspots using bids received from OPLIN's Form 470.
- If you are requesting month-to-month service without contract terms, you will skip this step.

From your Landing Page, click on your organization (Billed Entity) from the "My Entities" section to display the organization dashboard.

# Patron Hotspot Contracts Based on OPLIN's Form 470 Bids

OPLIN received three bids based on the Hotspot Form 470, which was filed to request pricing on behalf of all Ohio libraries.

If you would like to use one of the bids to purchase services/devices, start by comparing their costs and constructing a bid matrix to decide which bid best meets your needs.

To request a contract, contact the sales rep referenced in the quote. Each company may require you to fill out various documents to determine information, such as the number of hotspots you need service for, the number of hotspot devices, your invoicing preference (BEAR or SPI), and billing/account information.

Contracts must be signed and dated before you can upload them in the portal and start your Form 471.

#### **Contact Info:**

#### **Bids Received**

Zachary Shields
T-Mobile for Government
Account Executive
216-276-3462
Zachary.Shields1@T-Mobile.com

T-MOBILE FOR GOVERNMENT		Service Agreement NASPO - Individual Participating Addendum				
		Rate Plans & Features				
Rate P	Data per Line	Hotspot Tethering	Cost Per Line			
Government E-Rate Library Hotspot (TI	)	Unlimited	Unlimited	\$11.97		
		Devices				
Device	Price	Inseego (	Inseego Connect			
Social Mobile Rhino H1	\$84.00	N/	N/A			

Garrett Gauntner - AT&T Lead Client Solution Executive 2635 Billingsley Rd Columbus, OH 43235 Office: +1 614.787.3025 garrett.gauntner@att.com

	Monthly Unit Cost	
Data Plan	E-Rate Unlimited Hotspot Data Plan (5G / 4G LTE) <sup>1</sup>	\$15
	E-Rate 10GB Hotspot Data Plan (5G / 4G LTE) <sup>2</sup>	\$10
Filtering	AccessMyLAN <sup>3</sup>	\$6
Product		One-Time Unit Cost <sup>5</sup>
Equipment	5G Wi-Fi Hotspot Device	\$90

Ryan Marron
CDW•G Account
(312) 547-2877
ryamarr@cdwg.com
With Kajeet, you can choose service
from AT&T, Verizon, or T-Mobile

QUOTE DETAILS	4G	CDW Government LLC		
ITEM		CDW#	UNIT PRICE	
KAJEET KJ1 SMARTSPOT Mfg. Part#: SSKJ1 Contract: MARKET	W SMARTSIM	8120600	\$68.90	
Mfg. Part#: LBUNL Electronic distribution - NO I Contract: MARKET		8026490	\$14.98	

# **Bid Evaluations!**

Factor	Points Available	Vendor 1	Vendor 2	Vendor 3		
Price of the ELIGIBLE products and services	50	20	50	40		
Prior experience w/vendor	20	20	0	20		
Vendor provides adequate cellular coverage for our patrons	15	0	0	15		
Flexible Invoicing: FCC Forms 472 or 474	10	0	10	10		
Local or in-state vendor	5	5	0	5		
TOTAL	100	45	60	(90)		

Based on the above bid matrix criteria, we have chosen **Vendor 3** as the service provider for our **bandwidth and Internet Access**.

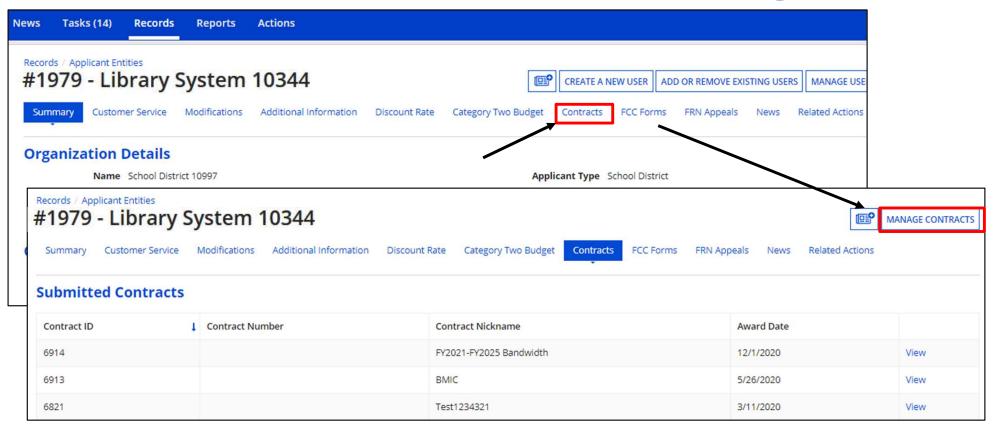
Name:	
Signature:	

Date:

- Remember!! Before you award a contract, be sure to construct a bid evaluation!
- Evaluate your bids with your bid factors listed and assigned points.
- Price must have the highest number of points
- If a vendor was disqualified, they would not be included in the bid matrix table but give an explanation as to why they were disqualified.
- Based on this example,
   Vendor 3 wins because they received the most points.

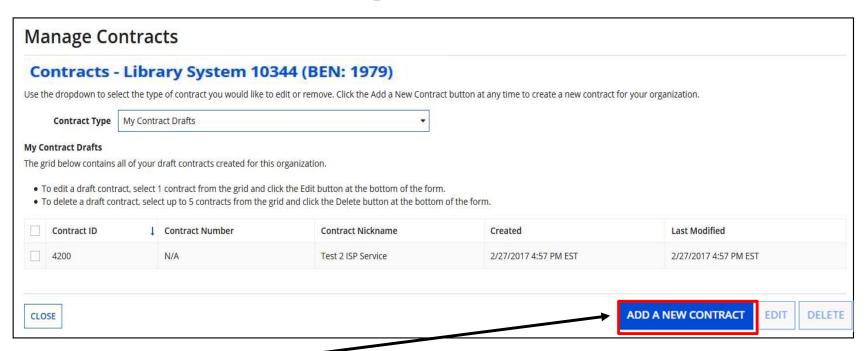
For a copy of a Category 1 and Category 2 bid matrix and acceptance letter, go to <a href="https://www.ohio-k12.help/erate/e-rate-resources/">https://www.ohio-k12.help/erate/e-rate-resources/</a>

#### **Manage Contracts**



Click on "Contracts", and then "Manage Contracts" to add new contracts. To see previously uploaded contracts, click on "View". **Note:** Once a contract has been added, you cannot edit the information, or delete it. If a mistake is found, you will have to add the contract again and reenter the accompanying information.

# Manage Contracts – Add New Contract

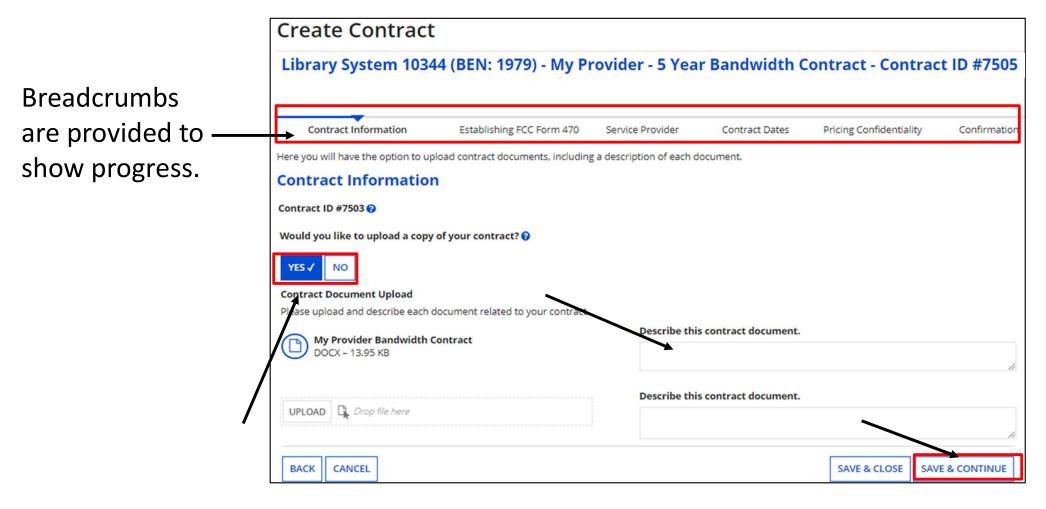


Begin by clicking on "Add New Contract".

Enter a nickname and contract number if known, click on "Save & Continue".

**Note:** if you need to stop before completing, click on "Save & Close".



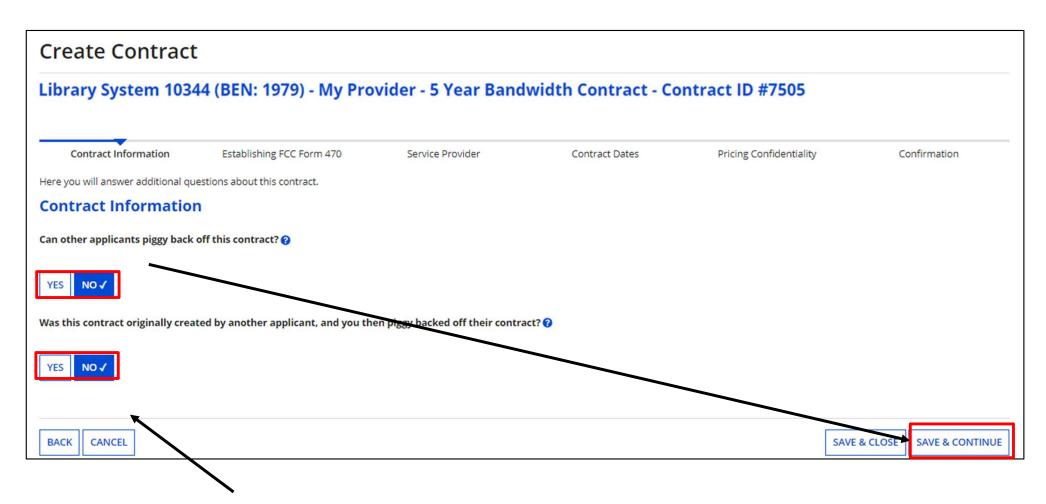


To upload a copy of the contract, choose "Yes" and upload the file. Enter a description of the document if you choose. You may add multiple documents if you choose. When done, click on "Save & Continue".

\*Note: If you have an existing contract that has addendums, it is recommended that you include all items as a single document. This also includes letters memorializing a purchasing decision if the contract was signed at a later date.



Provide answers. If unsure of the question, hover over "?" for an explanation. Click on "Save & Continue".



Select the contract Piggy Back options. (The second question doesn't appear until you answer the 1<sup>st</sup> one.) Click on "Save & Continue".

Enter the number of bids received.

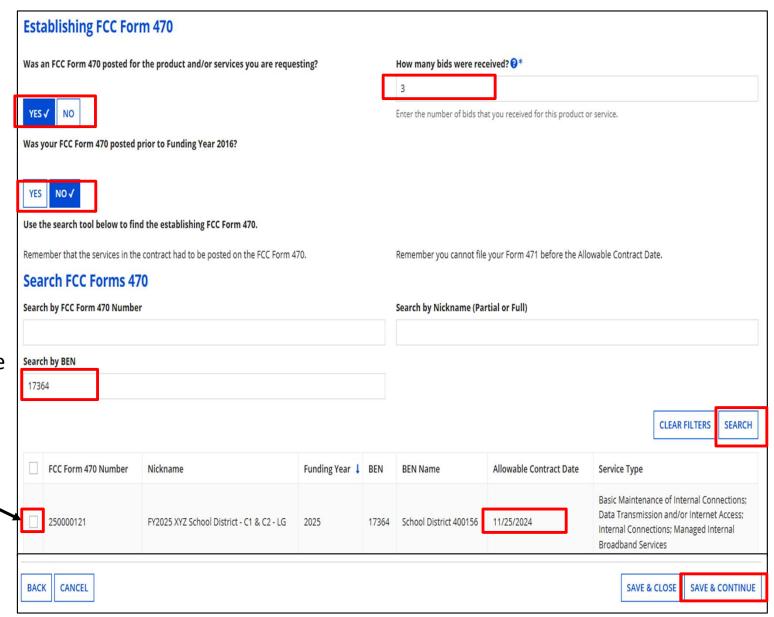
Choose "Yes" if a Form 470 was filed and indicate if it was done prior to FY2016.

If you are using FY2016 – FY2025 Form 470, you can search the portal for it. If you are not searching by BEN, enter your search criteria and click on "Search." The results will be listed below.

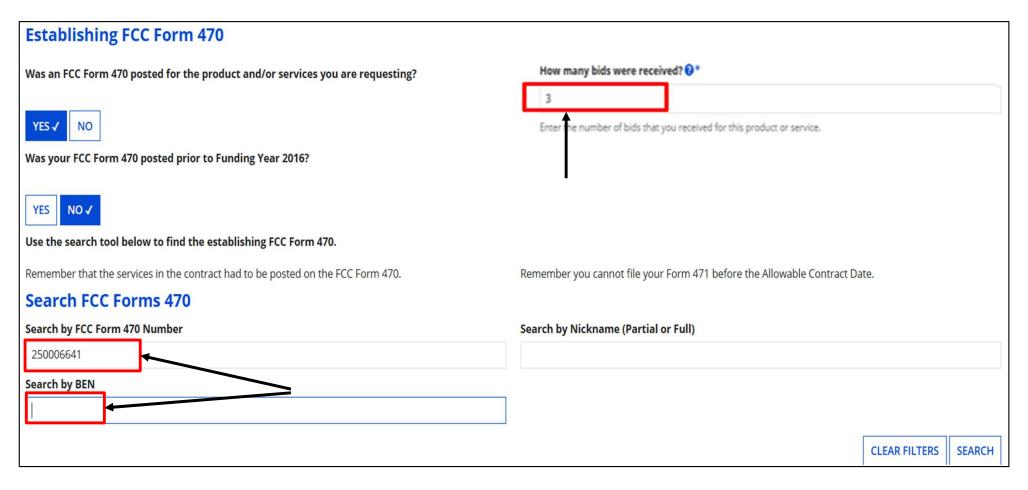
Check the box to select, and click on "Save & Continue"

Note: "Allowable Contract Date" is shown. If you choose a 470 that's before the allowable date, you will receive an error message

# **Manage Contracts – Create Contract**



# Patron Hotspots - Referencing OPLIN's Form 470



**NOTE**: If you are uploading a contract for patron hotspots using bids received from OPLIN's Form 470, enter "3" for the number of bids received. Remove your BEN shown in "Search by BEN," which is auto-populated, and enter "250006641" in the "Search by FCC Form 470 Number".

**Create Contract** Library System 10344 (BEN: 1979) - My Provider - 5 Year Bandwidth Contract - Contract ID #7505 Service Provider Contract Information Establishing FCC Form 470 Contract Dates Pricing Confidentiality Confirmation **Enter Account** Here you will associate the service provider listed on the contract. Number if known, Service Provider but not required Account Number (e.g., billed telephone number) If your service provider has given you one or more Account Numbers, please enter them. Please select the service provider for this contract using the search below. Enter search Search Service Providers criteria for Service Search by SPIN Search by Name (Full or Partial) Provider by SPIN or 14010001 name, click on CLEAR FILTERS SEARCH "Search". SPIN Doing Business As Name State 14010001 USAC Service Provider Organization 1 Check box to select. click on "Save & **SAVE & CONTINUE** Continue" BACK CANCEL SAVE & CLOSE



Indicate if this is a multi-year contract and enter the date the contract was awarded.

\*\*Remember, the date must be **on or after** the Allowable Contract Date listed on the Form 470. The Contract Expiration Date will be entered later in the FRN on the Form 471.

Click on "Save & Continue".



Indicate if voluntary extensions are allowed. If so, provide the contract expiration date if all extensions are exercised, the number of extensions left on the contract, and the total remaining length of the contract if you exercise all extensions.

Note: If your contract states that at the end of the contract term, it will auto-renew until you cancel it, that is not a voluntary extension. It must have a future expiration date.

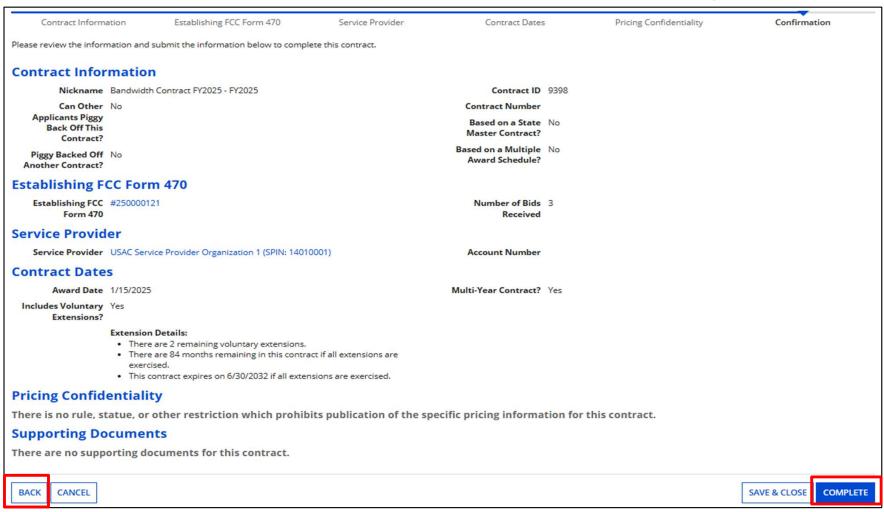
Click on "Save & Continue".



Indicate if there is a restriction prohibiting publication of the pricing for this contract. If "Yes", you must state the type of restriction (State Law, Local Rule, Court Order, Contract with Restrictive Terms), and upload Restriction Document.

Click on "Save & Continue".

# Manage Contracts – Create Contract (Confirmation)



If an error is found, click on "Back" and correct it.

If the information is correct, click on "Complete". Keep in mind that if a mistake is found after it's submitted, you can not edit it. You will have to create a new contract record.

#### **Manage Contracts**



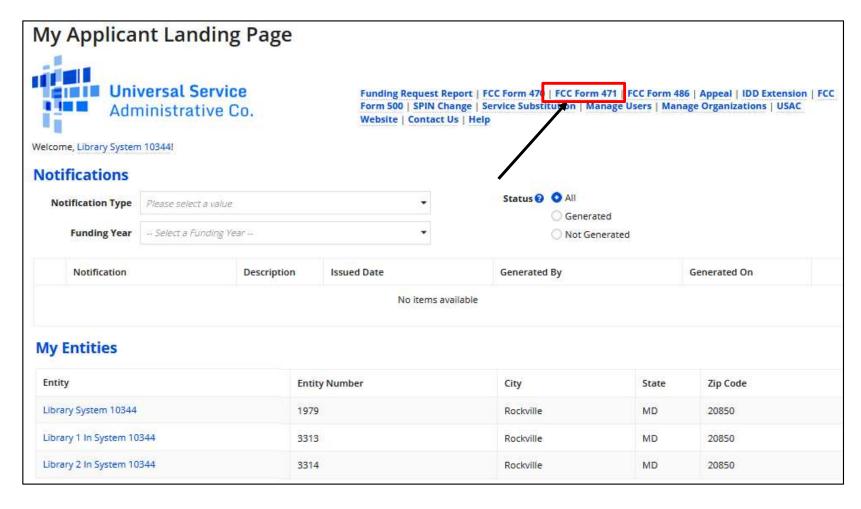
To see contracts you've added, go back to "Manage Contracts" as before. Click on the pull-down and choose "Submitted Contracts".

If you started adding a contract but had to "Save & Close" before completing it, click on "Manage Contracts", and choose "My Contract Drafts" as the contract type. Select the contract from the grid and click on "Edit" to continue.

Remember, you will need to complete the steps for each contracted service.

# Filing a Category 1 (DT/IA) Form 471

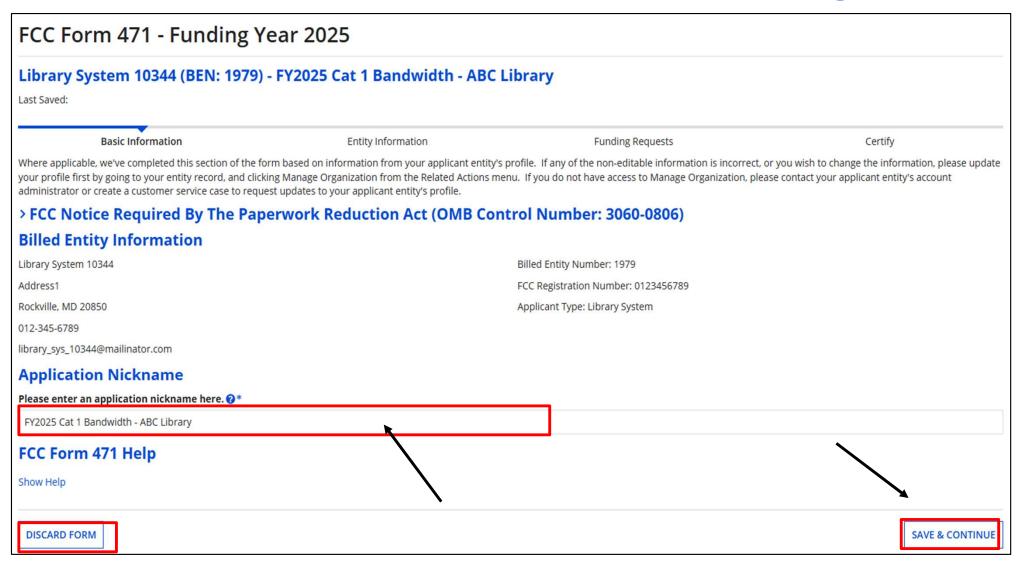
### Filing the Form 471



From the Landing Page, click on "FCC Form 471".

**Note:** When you begin the FCC Form 471, the basic information about your Billed Entity will be automatically populated from your profile. If you did not update your entity profiles by the Jan. 9<sup>th</sup> deadline, your FY2024 data will be displayed.

#### Filing A Form 471

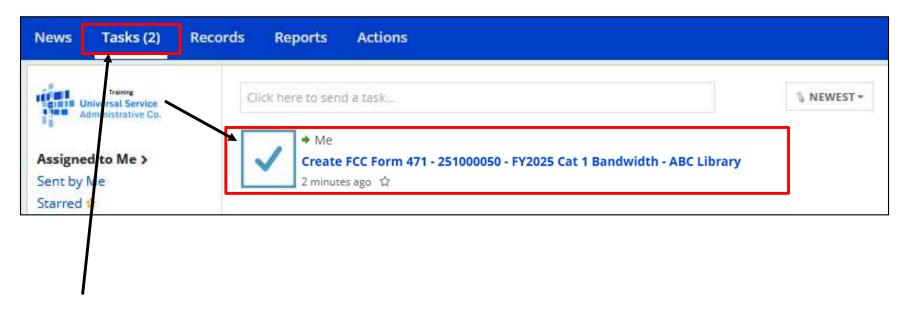


Enter an application nickname that is descriptive and click on "Save & Continue".

As before, breadcrumbs are listed at the top, and required fields are indicated by \*.

You also have the option to "Discard Form" to discard your work. Once you confirm that you want to discard the form, it will no longer be available in the EPC system. 32

#### **Continuing a Form 471**



If, after completing part of the form, you need to stop and return to it later:

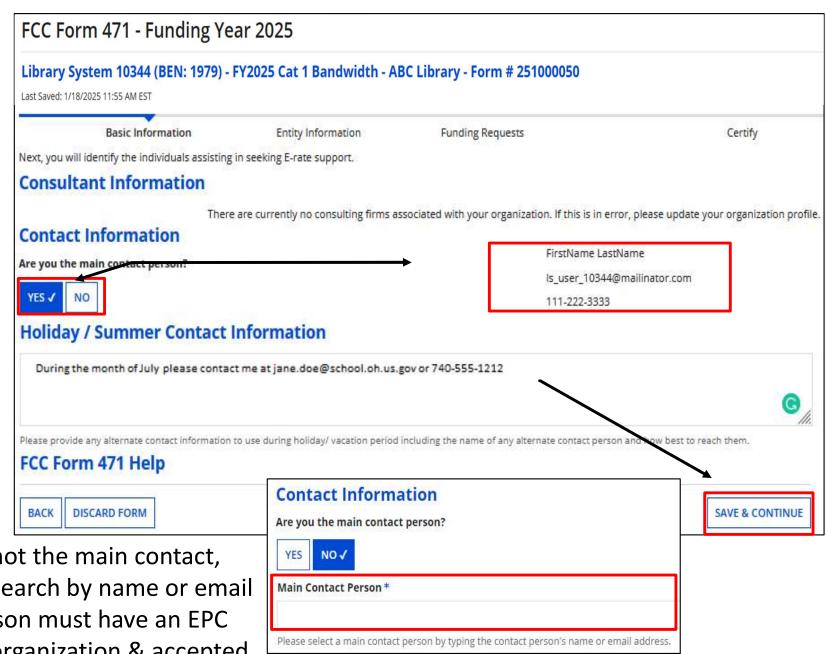
• Click the "Task" tab to locate the in-process form when you return to EPC.

Please note: the task is named "Create Form 471" instead of "Continue". However, you will be taken to the screen in the application where you left off.

#### Filing the Form 471

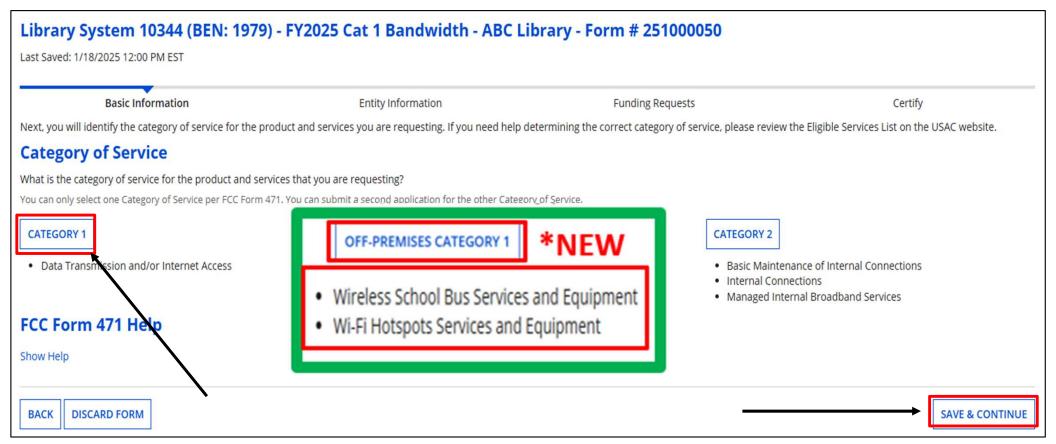
Choose "Yes" if you are the main contact, and your information will be displayed.

Provide "Holiday / Summer" contact information if appropriate, and click on "Save & Continue"



**Note:** If you are not the main contact, select "No" and search by name or email address. The person must have an EPC account for this organization & accepted the Terms & Conditions to be added.

#### **Choosing Category of Service**

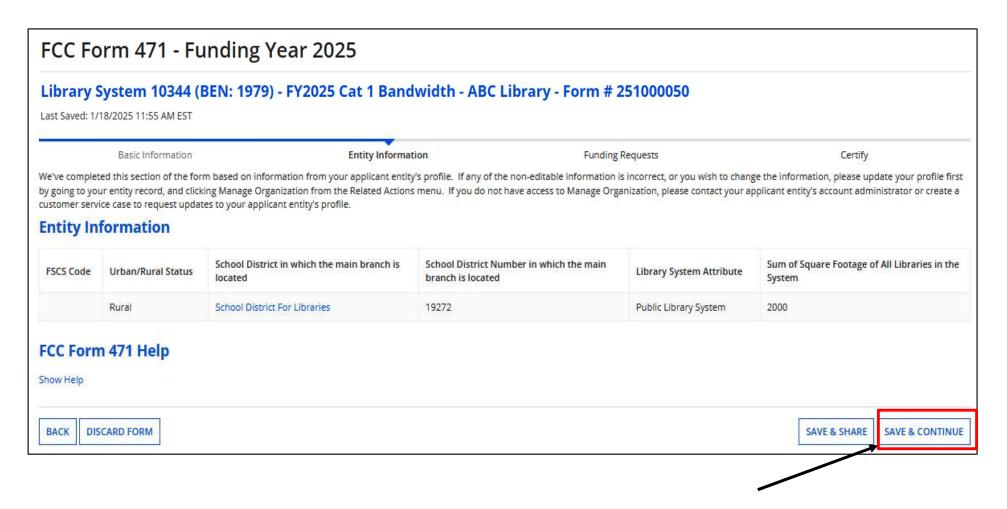


Choose the "Category of Service" for the products/services you're applying for **this** Form 471. **You must now select:** 

- Category 1 (bandwidth/IA, which includes Bookmobile/Kiosk Access),
- OFF-PREMISES CATEGORY 1 (School Bus Wi-Fi and/or Wi-Fi Hotspots for students or library patrons)
- Category 2

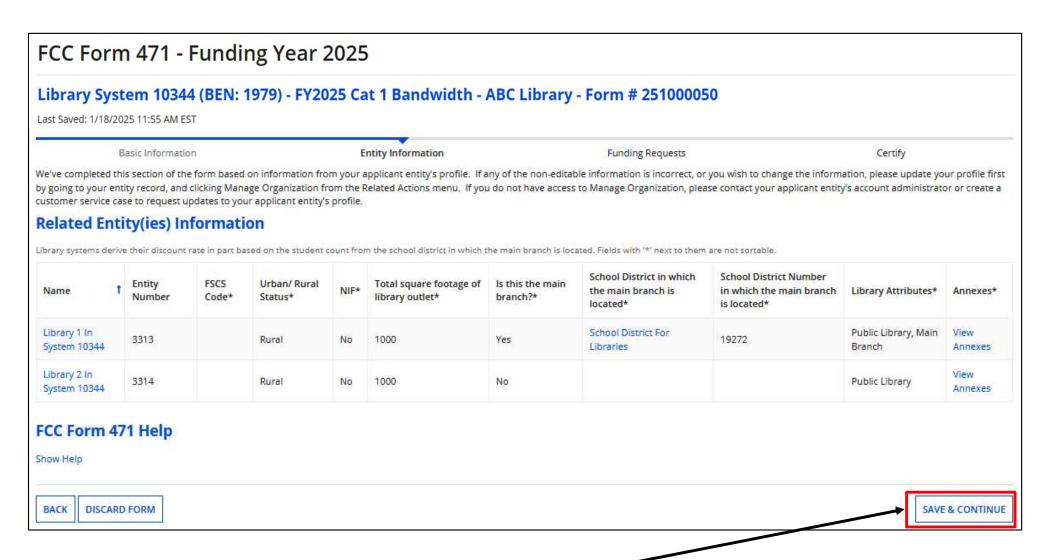
You **cannot** select all three on the same Form 471. Also, once you click "Save & Continue", you **cannot** change the selected category for this application.

#### **Entity Information**



This portion of the form populates, and displays information based on your entity's profile. Click on "Save & Continue"

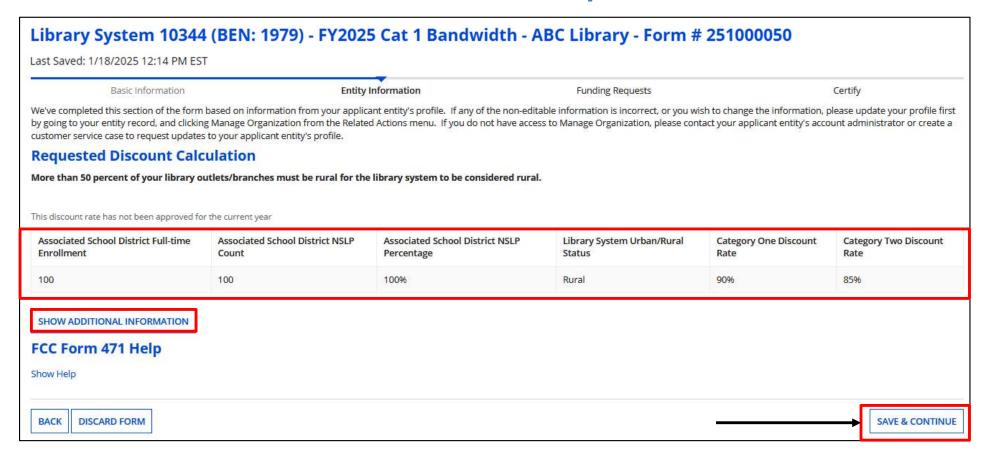
# **Related Entity Information**



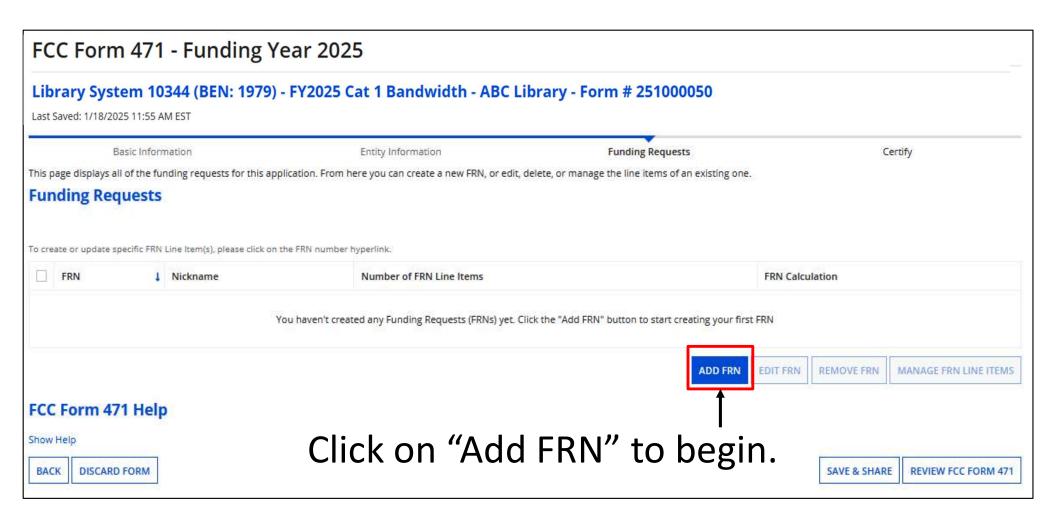
View "Related Entity Information".

Click on "Save & Continue".

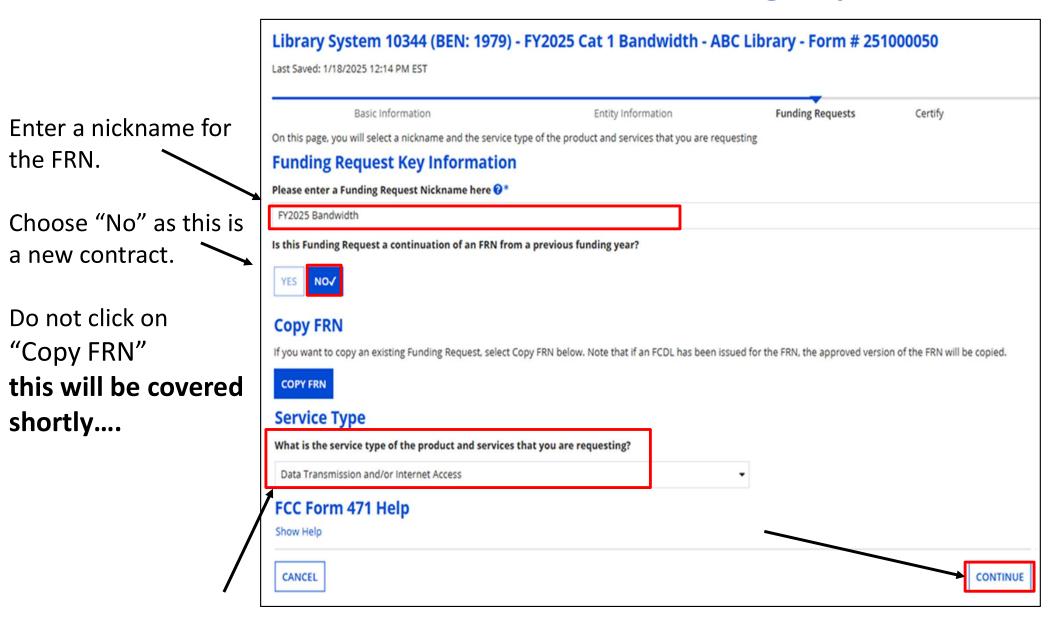
# **Requested Discount Calculation**



Discount Calculation shown based on your entity's profile. To see a list of all entities, click on "Show Additional Information". When done, click on "Save & Continue" to start adding funding requests.



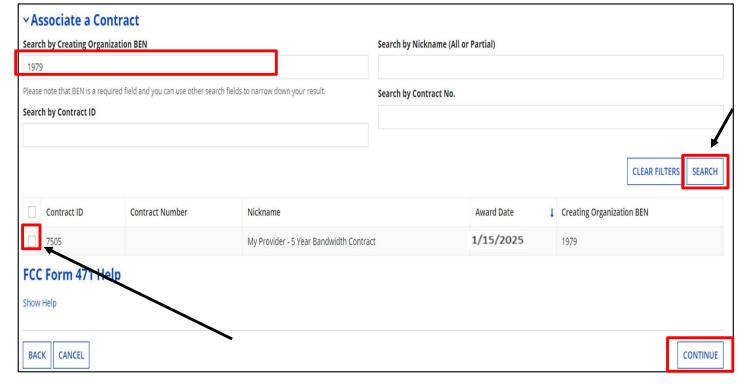
Note: "Part 1" is where we indicate how we're purchasing and associate a contract if appropriate. "Part 2" is where we provide bandwidth info, the connection type, cost, and who's using the service.



"Data Transmission and/or Internet Access" auto-populates, click on "Continue"

Choose how the services will be purchased and click on "Continue".

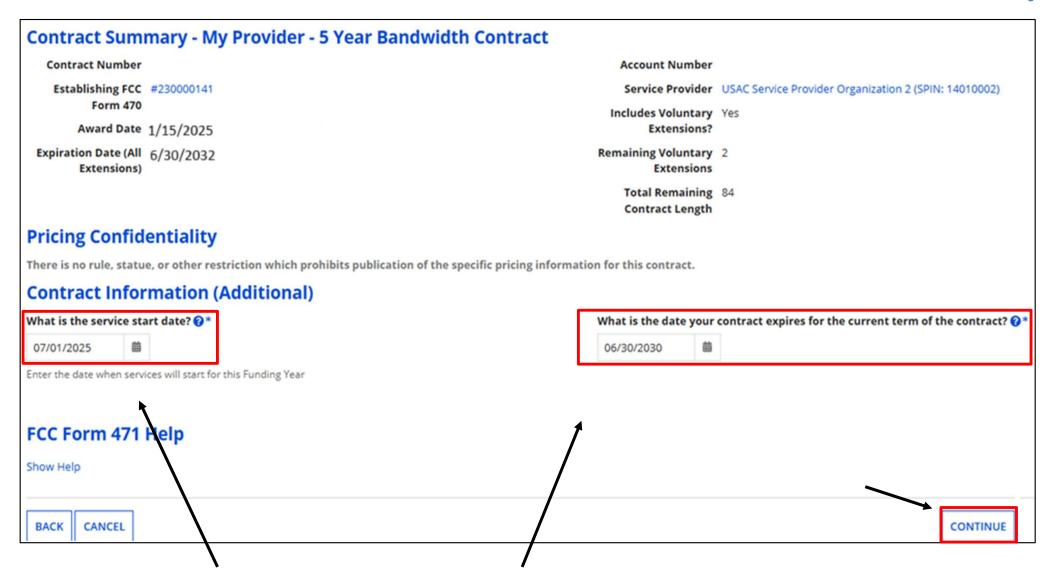




If "Contract" was indicated, search for the associated contract that was uploaded previously.

Enter search criteria and click on "Search". Results will be listed in a grid below. Click box to select contract. The summary will be displayed below.

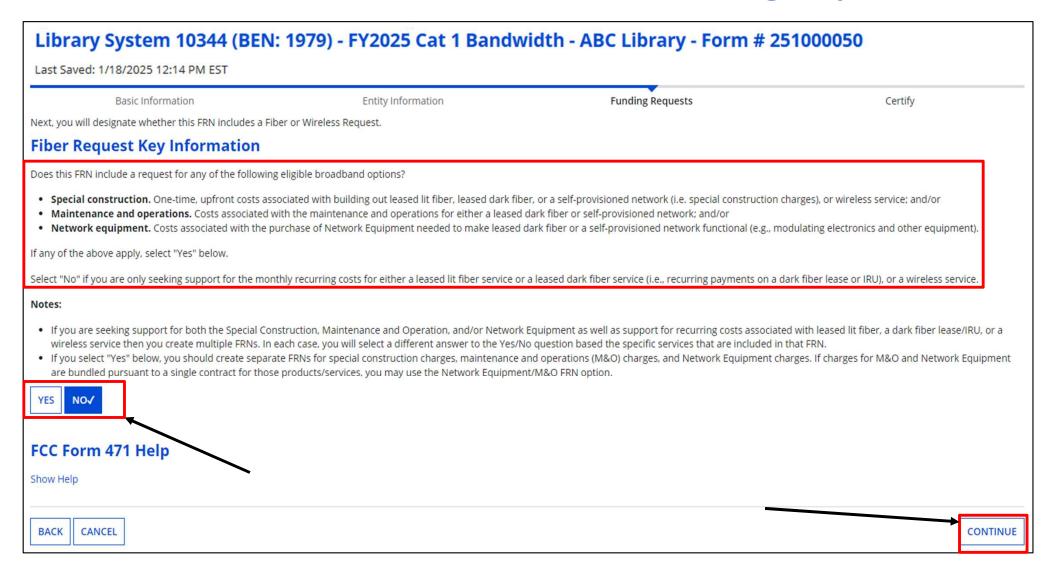
# **Contract Summary**



Verify the service start date; that's auto-populated. The default is 07/01/2025 for the upcoming funding year.

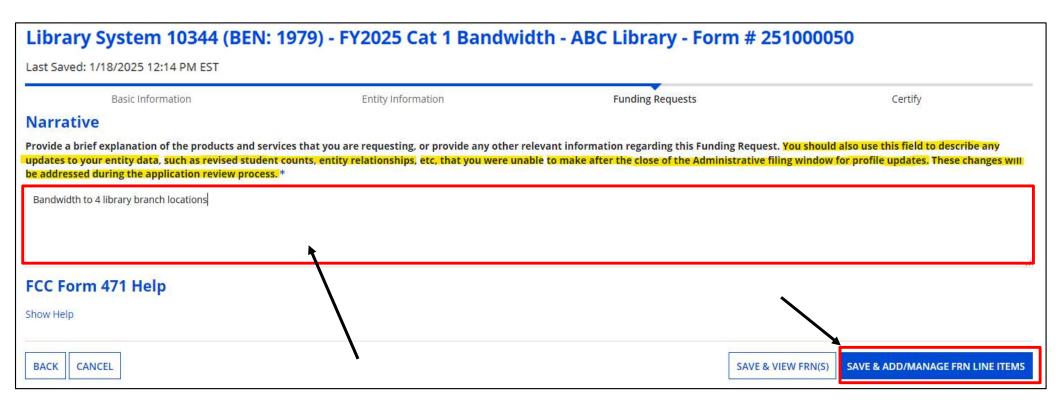
Enter the date the contract expires for the current term of the contract, not including extensions.

Once completed, click on "Continue"



Indicate whether this FRN includes any of the options listed above. If not, select "No" and click on "Continue"

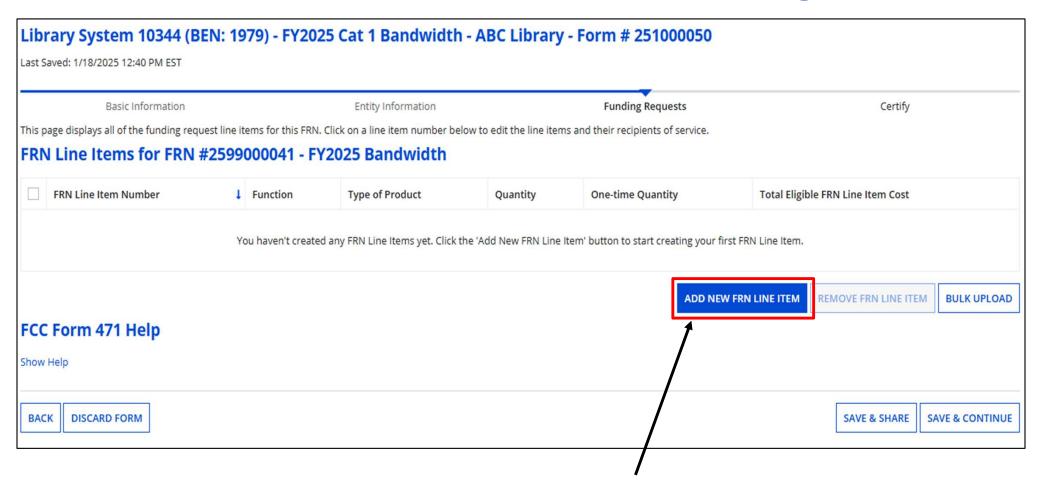
# **Funding Request Narrative**



Provide a brief description of the products and services you are requesting. Note: if you added a new entity and they'll be receiving service, but it's not listed in EPC yet, provide the name and entity number in the narrative and explain they will receive service also. You can also provide corrected addresses if needed.

Click on "SAVER ADDIMANAGE FRIN LINE ITEMS" to begin "Part 2" entering the **key information for** your funding request.

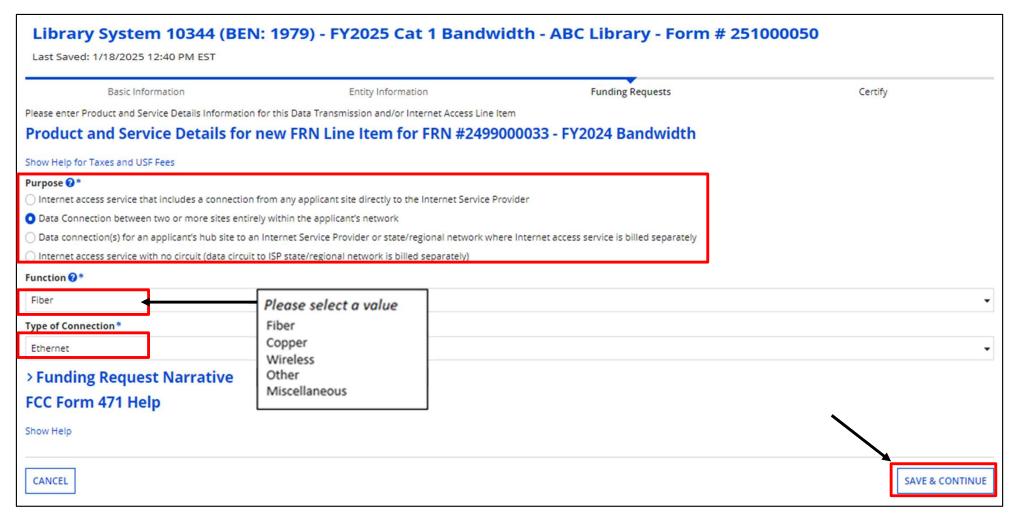
# **Adding FRN Line Items**



Click on "Add New FRN Line Item".

Keep in mind, an FRN may have several line items that make up the total funding request, depending on the products or services you are purchasing.

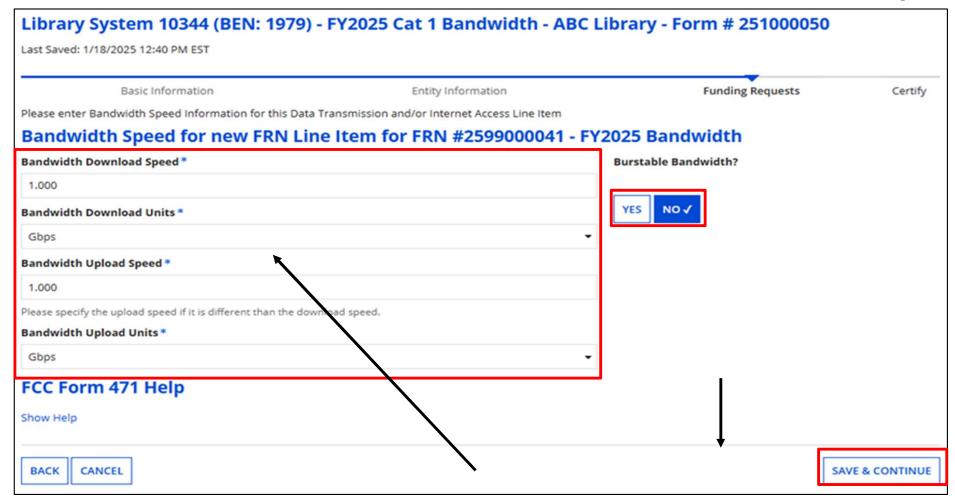
# **Product/Service Details**



Select the "Purpose," "Functions," and "Type of Connection," then click on "Save & Continue." Note: If this is a circuit connecting a branch location to your main library, choose the second "Purpose."

If it's service to the branch from the ISP, providing both the data circuit and Internet Access, such as CABIO, choose the first one.

# **Bandwidth Speeds**

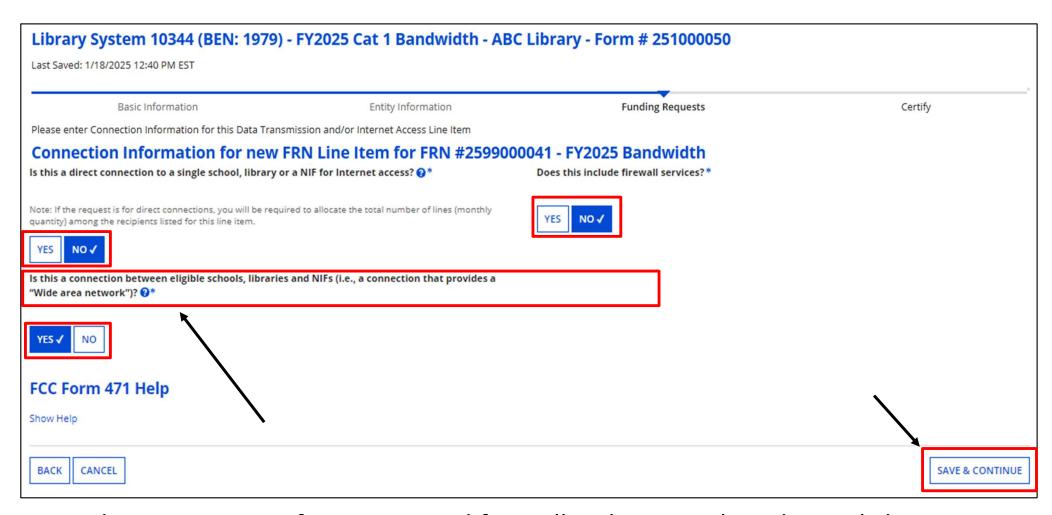


Enter Bandwidth Speed Information, indicating if the bandwidth is burstable, then click on "Continue".

Note: Depending on the "Function" and "Type Connection" you chose previously, the bandwidth information may be populated for you.

Again, if you are unsure of the information, contact your Service Provider

#### **Connection Information**



Provide Connection Information, and firewall inclusion. When done, click on "Continue".

**Note:** The system will not allow you to answer "Yes" to both questions displayed on the left-hand side above. If you do, you will receive an error message.

#### **Cost Calculations**

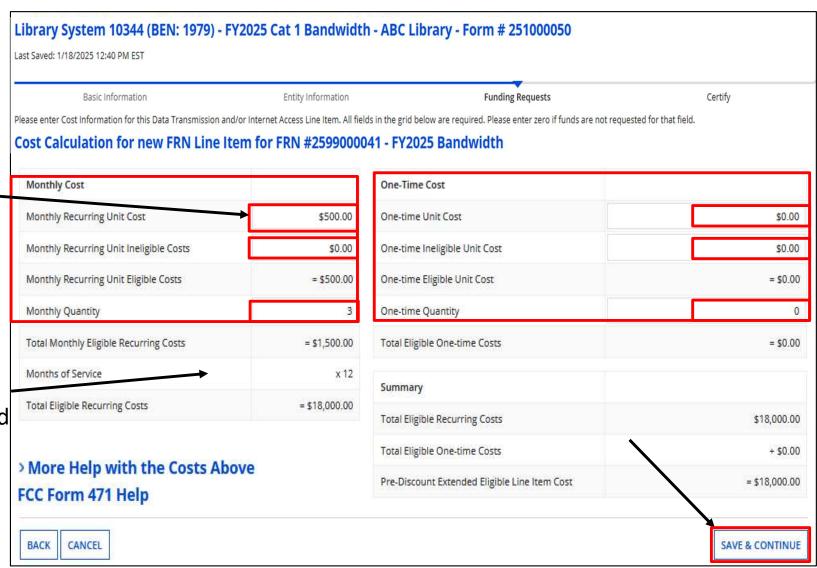
Enter cost information. Fields cannot be left blank. If there is no cost, enter zero.

"Cost" is listed per unit. The "Monthly Quantity" indicates the total number of units included in the service, such as the number of circuits.

The "Months of Service" is based on the dates you entered under Part 1."

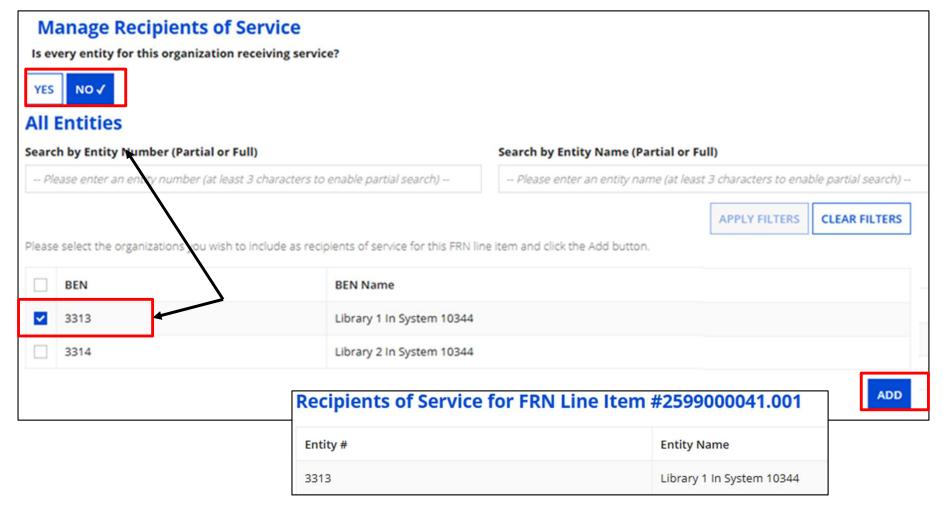
The table calculates the total costs.

"One-Time Cost" would be for installation.



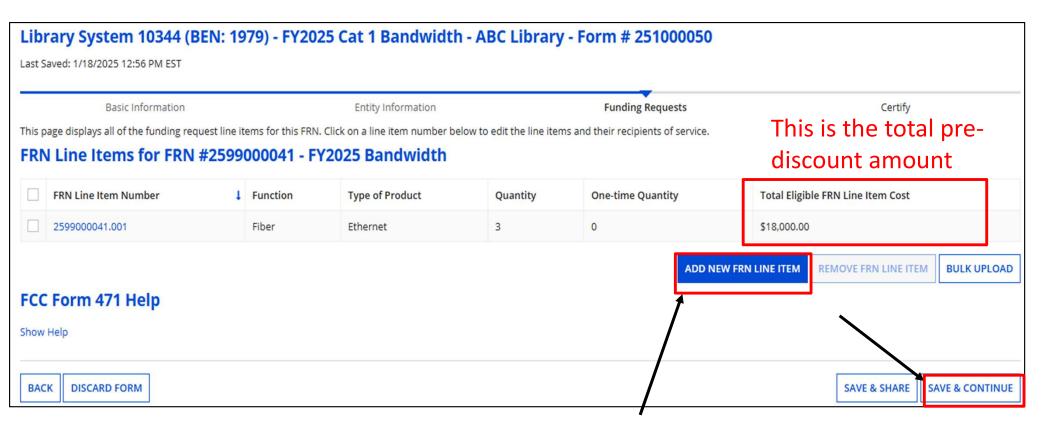
When completed, click on "Save & Continue"

# **Manage Recipients of Service – Shared Service**

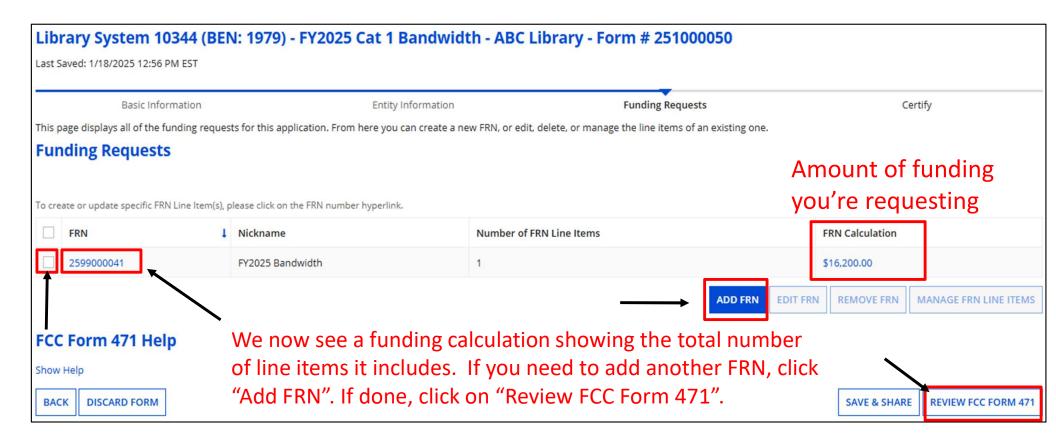


Indicate which entities will receive service for this line item. If all entities receive service, click on "Yes." If "No," check the box to the left of the site's receiving service and click "Add." When done, click on "Save & Continue." You'll see the recipients selected. Click on "Save & Continue" again.

# **Adding FRN Line Items**



The grid shows the completed item. If additional Line Items are needed for this Funding Request, click "Add New FRN Line Item". If you need to edit information in the line item, click on the FRN Line-Item Number (2599000041.001). If done, click on "Save & Continue".



If you need to edit "Part 1" (Contract information, Service Start Date or Expiration Date, or Narrative), click the box to the left and then " EDIT FRN ".

If you need to edit the FRN Line
Items (Costs, bandwidth amounts,
Recipients of Service), click the box
and then "MANAGE FRN LINE ITEMS" or click
on the funding request number and
then the line item you need to edit?

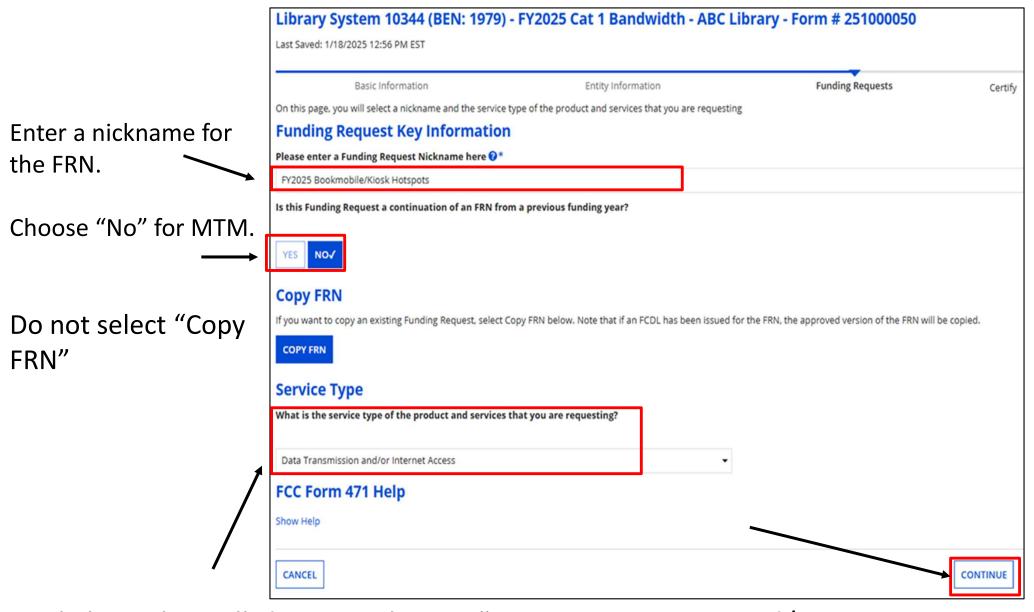
# Adding a Month-to-Month Funding Request

# M-T-M Funding Requests

Library System 10344 (BEN: 1979) - FY2025 Cat 1 Bandwidth - ABC Library - Form # 251000050									
Last Saved: 1/18/2025 12:56 PM EST									
	Basic Information	Entity Information	Funding Requests	Certify					
This page displays all of the funding requests for this application. From here you can create a new FRN, or edit, delete, or manage the line items of an existing one.									
Funding Requests									
To create or update specific FRN Line Item(s), please click on the FRN number hyperlink.									
	FRN	Nickname	Number of FRN Line Items	FRN Calculation					
	2599000041	FY2025 Bandwidth	1,	\$16,200.00					
			ADD FRN EDIT FR	N REMOVE FRN MANAGE FRN LINE ITEMS					
			ADD FRI	NAME OF THE PROPERTY OF THE PR					
FCC Form 471 Help									
Show Help									
Click on "Add FRN" to begin.									
BAC	CK DISCARD FORM		•	SAVE & SHARE REVIEW FCC FORM 471					

M-T-M may be a monthly hotspot service for your bookmobile or kiosks, or

**CABIO** Internet Access (commercially available service such as DSL). To qualify, the bandwidth must be a minimum of 100MBx10MB, and the monthly recurring cost per site cannot exceed \$300.



Click on the pull-down to choose "Data Transmission and/or Internet Access" if it doesn't auto-populate, and then click on "Continue"

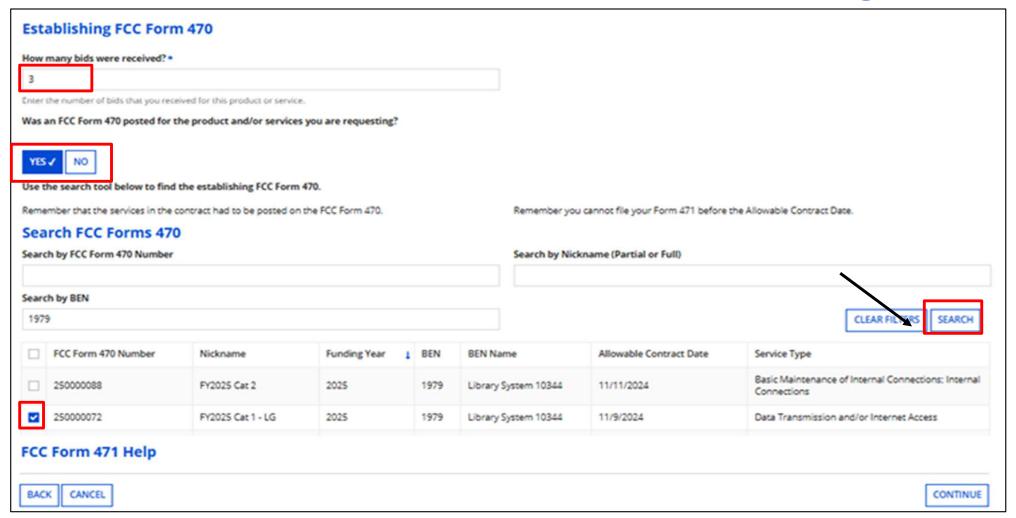


Choose Month-to-Month. Because MTM does not have a contract in play, you would not have uploaded a contract beforehand. However, **MTM services**, **such as cellular data plans for a bookmobile, require you to file a Form 470 annually**, so we still need to provide the Form 470 information on the next screen. Click on "Continue."

BUT: If this is for CABIO MTM service, a Form 470 is not required!!

For any MTM service, be prepared to provide a copy of a current bill during PIA review to prove the cost and service provided.

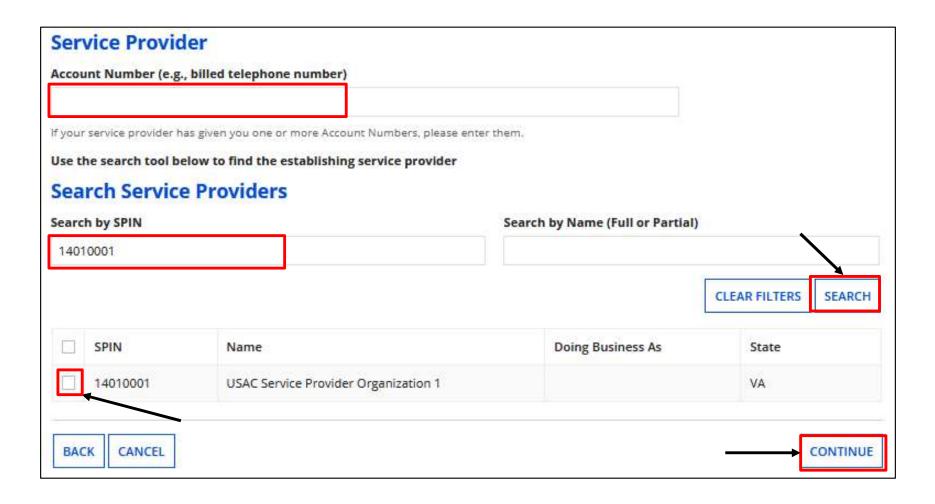
# **Establishing Form 470**



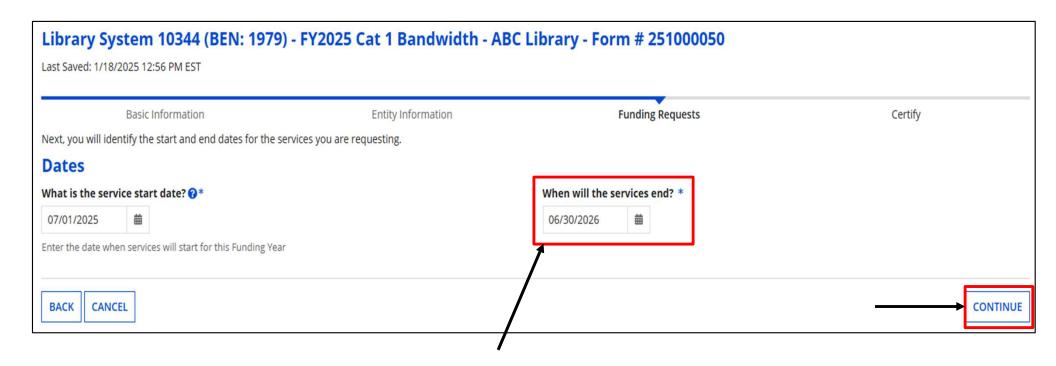
Enter the number of bids received and select "Yes" to indicate a Form 470 was filed, if applicable. Click on "Search" for your Form 470 and check the box to the left to choose the form that includes the service type requested.

If CABIO, select "NO", and enter "0" for the number of bids since you can't leave the field blank.

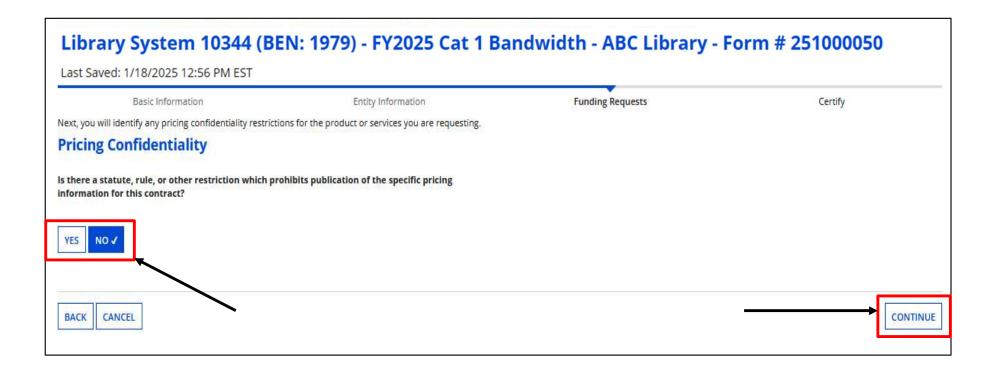
#### **Choose Service Provider**



Enter your account number if known (but it's not required), and then search for your Service Provider. It's easiest to search by their SPIN. Click on "Search". Check the box to the left of the Provider. Once completed, click on "Continue"

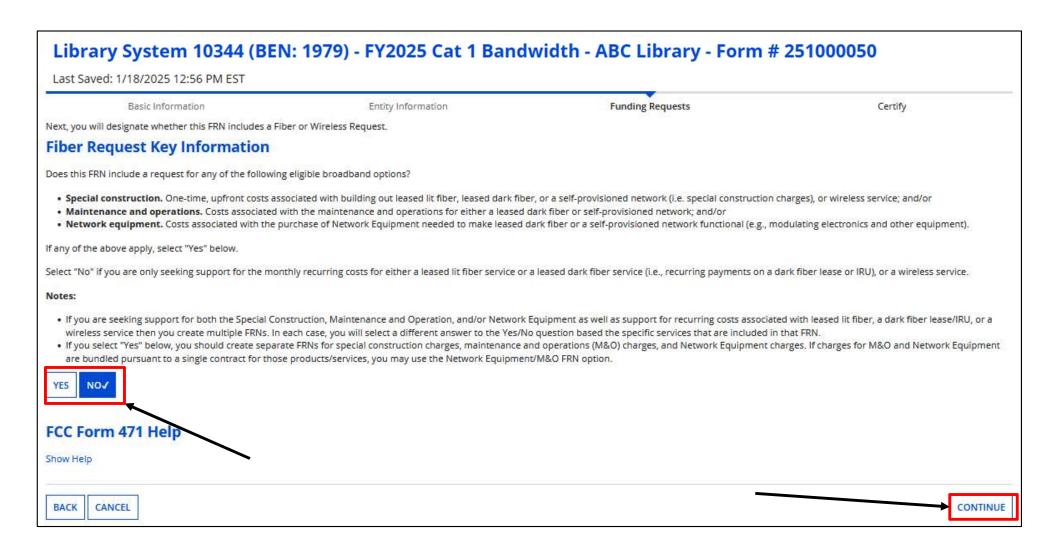


The Service Start Date will auto-populate for the start of FY2025. Enter the Service End Date. The date cannot be after 6/30/2026 for month-to-month service. Click on "Continue"



Indicate if there is a restriction prohibiting publication of the pricing for this contract. If "Yes", you must state the type of restriction (State Law, Local Rule, Court Order, Contract with Restrictive Terms), and upload Restriction Document.

Click on "Continue".



### Select "No" and click on "Continue"

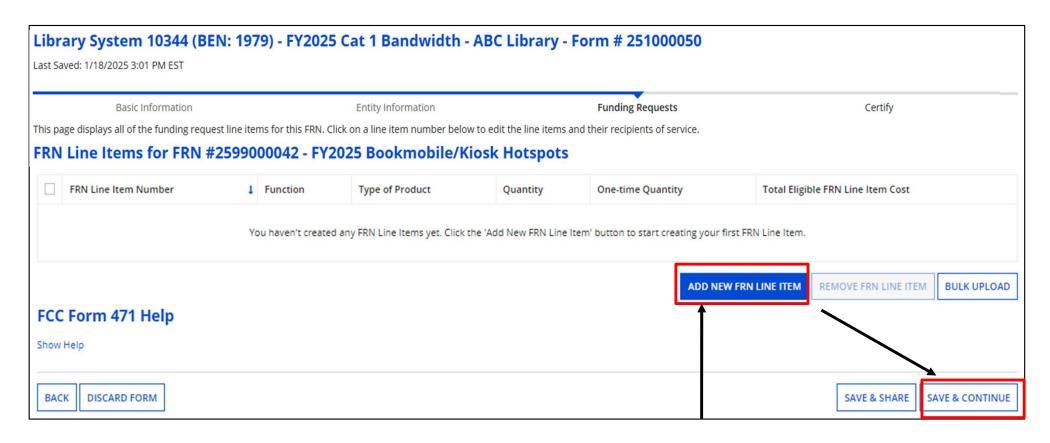
# **Funding Request Narrative**



Provide a narrative to describe the service.

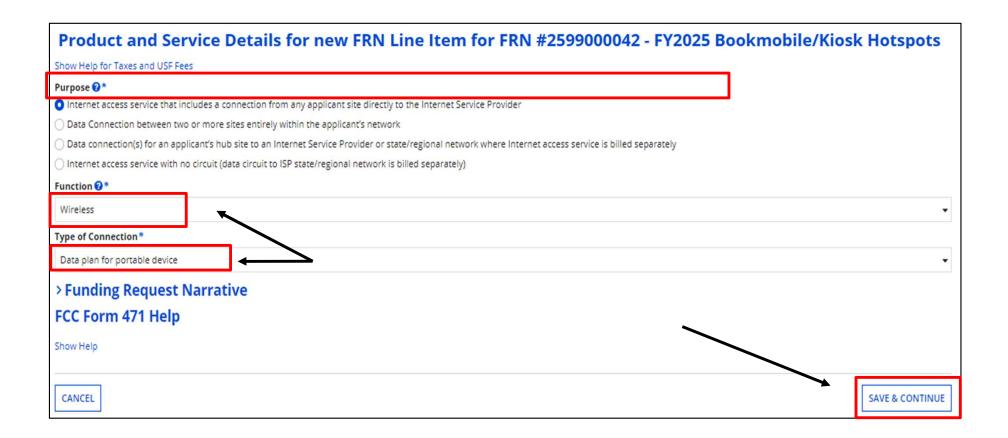
Click on "Save & Add/Manage FRN Line Items".

# **Adding FRN Line Items**



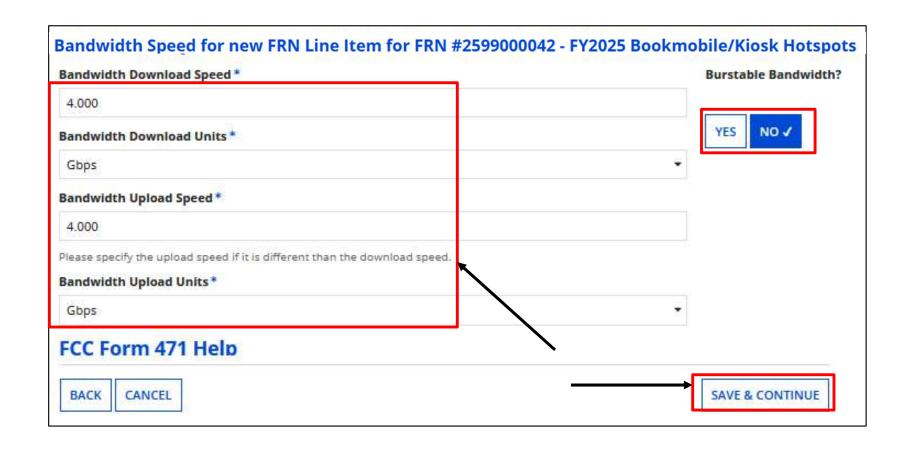
Begin by clicking on "Add New FRN Line Item" to add cost information.

# **Product/Service Details**



Select the "Purpose", "Functions", and "Type of Connection" then click on "Save & Continue".

# **Bandwidth Speeds**



Enter Bandwidth Speed Information, indicating if the bandwidth is burstable, then click on "Continue".

Again, if you are unsure of the information, contact your Service Provider

#### **Connection Information**



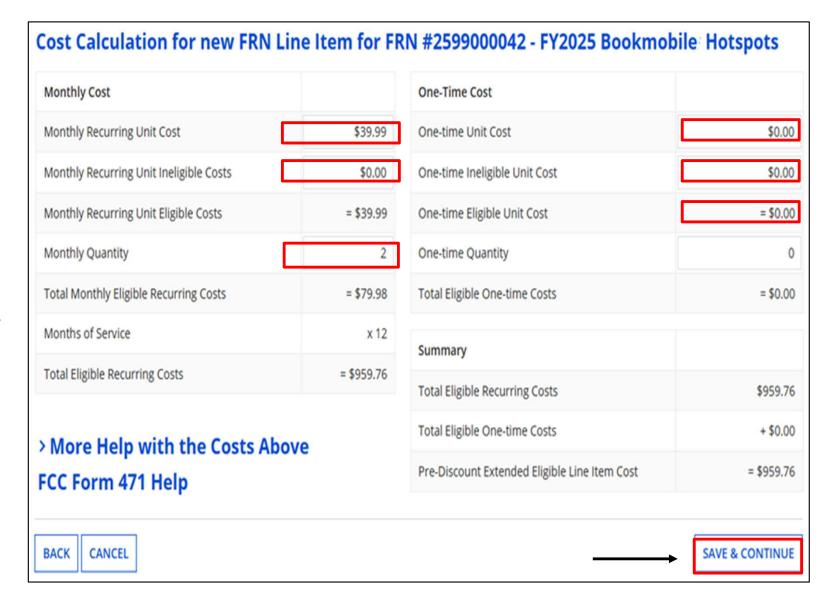
Provide Connection Information, and firewall inclusion. When done, click on "Continue".

**Note:** The system will not allow you to answer "Yes" to both questions displayed in the left-hand column above. If you do, you will receive an error message.

#### **Cost Calculations**

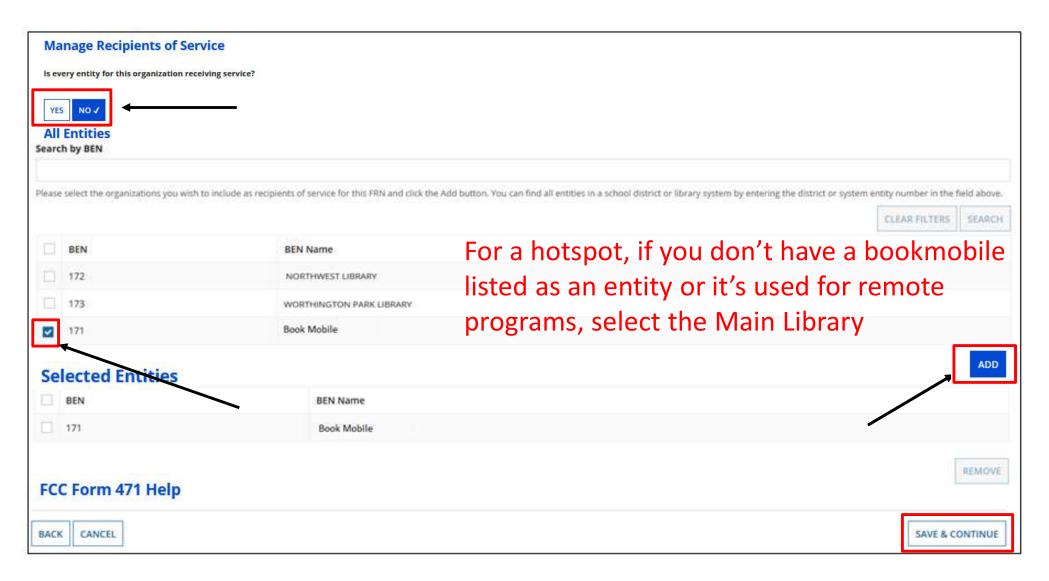
Enter cost information. Fields cannot be left blank. If there is no cost, enter zero.

"Cost" is listed per unit. The "Monthly Quantity" indicates the total number of units included in the service, such as the number of circuits. The table calculates the total costs.



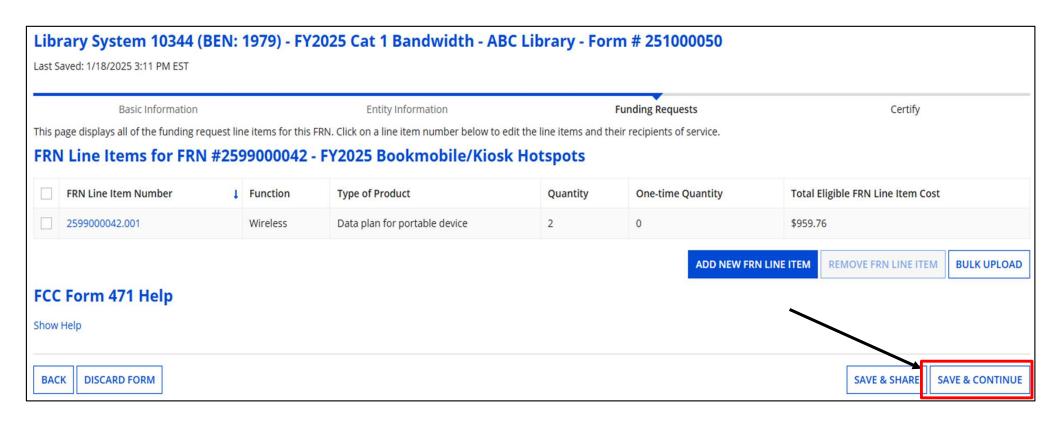
When completed, click on "Save & Continue"

# **Manage Recipients of Service – Shared Service**



Indicate which entities will receive service for this line item and click on "Add". Click on "Save & Continue". Selected recipients will be listed, click on "Save & Continue" again to see FRN info.

# **Adding FRN Line Items**



When done adding line items, click on "Save & Continue" to see completed FRNs.

# Copying FRN

#### Start by clicking on "Add FRN" as before:

# **Copy FRN**

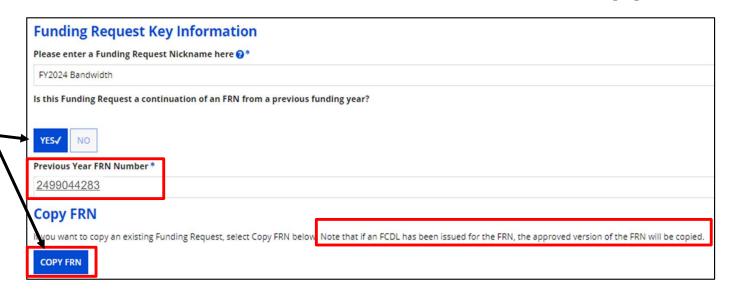
The "Copy" option can be used when you're in year 2 or more of a multi-year contract.

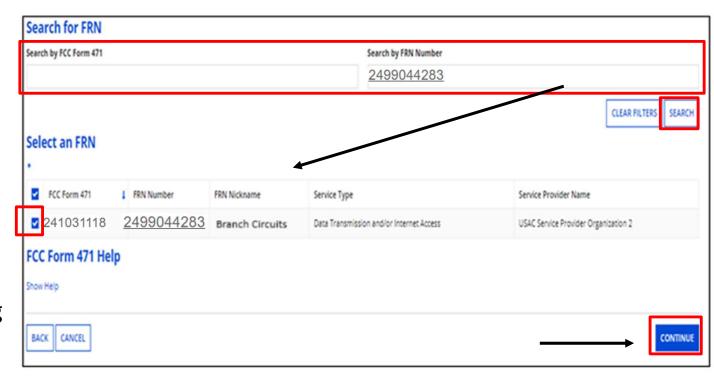
Enter Previous Year FRN and click on "Copy FRN".

Note: if changes were made to the FRN during PIA review, the changes will be copied.

Search by previous Form 471 or FRN number. (Enter the FRN a second time, even though we just provided it)

Select the check box and then click on "Continue." A pop-up will appear indicating that it may take up to one minute to complete. Click on "Yes."





# **Quick Way to Get the Information Needed**

# Go to: www.E-Ratecentral.com

Try our state funding or BEN Search Tools to find out information about your state or BEN





#### **E-Rate Utilization Summary Chart**

FY: 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022

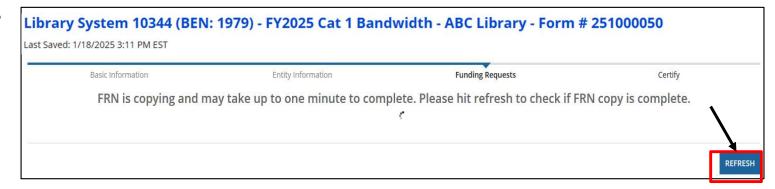
Rec FY	quested FRNs	Funded FRNs	486 on File	Requested Amount	Committed Category 1	Committed Category 2
2025	0	0	0	\$0.00	\$0.00	\$0.00
2024	5	5	5	\$40,938.39	\$38,585.16	\$1,373.18
2023	4	4	4	\$38,649.75	\$38,649.75	\$0.00
2022	4	4	4	\$56,077.49	\$56,077.49	\$0.00

	<u>471</u>	FRN	<u>SPIN</u>	Service Provider	Service*
	241031118	2499044282	143050436	Charter Communications Operating, LLC	IA
	241031118	2499044283	143000677	Verizon Wireless (Cellco Partnership)	IA

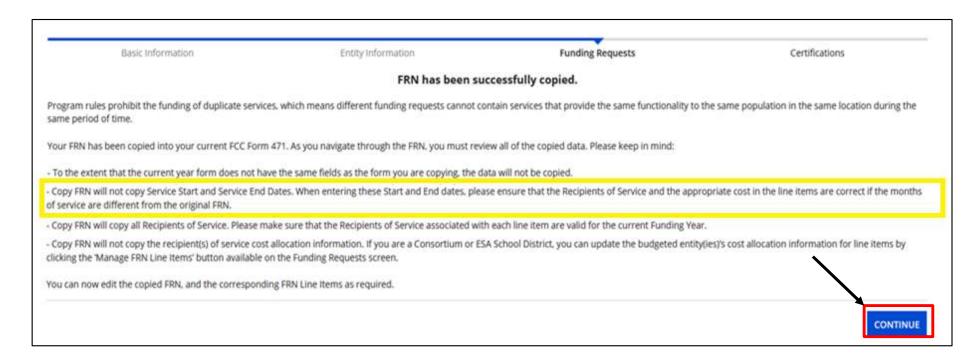
- 1. Enter your Billed Entity Number.
- 2. Click on Funding Year
- 3. See your 471, FRN, and SPIN information.

You must click "Refresh" to complete the copy. It won't advance on

its own.

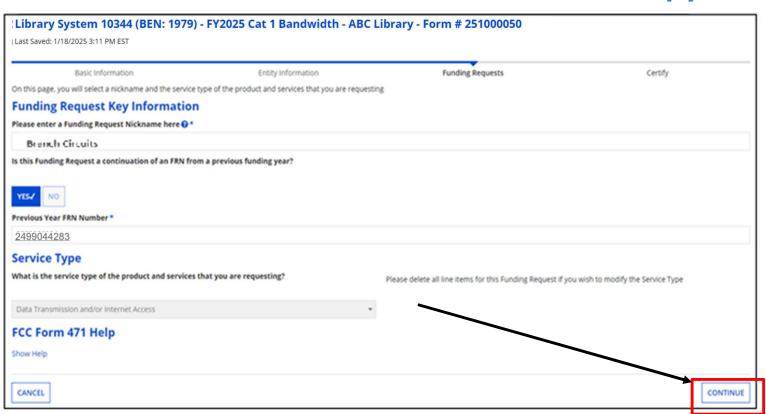


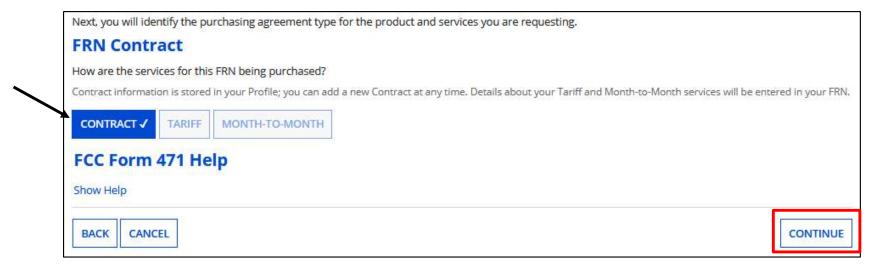
You will receive the following notification indicating you must enter the Service Start and Service End Dates. Click on "Continue".



View after copy is completed. "Service Type" will be indicated. Click on "Continue".

Based on previous FRN info, "Contract" is chosen. Click on "Continue



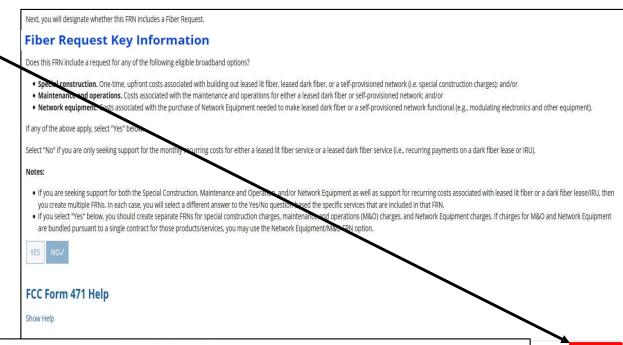


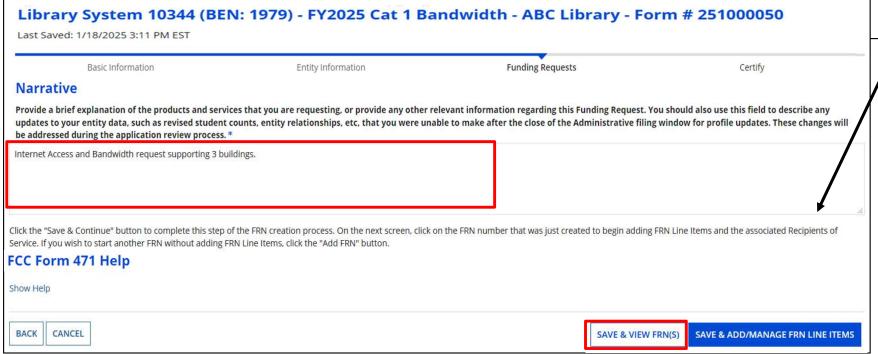


Verify information that copied from previous FRN. When copying, you must **enter the Service Start and Service End dates**. These fields will be blank, and you'll receive an error message if you do not enter the dates. Remember, the Service Start Date is the first day of the upcoming funding year and cannot be prior to **07/01/2025**. Click on "Continue".

Verify information that copied from previous FRN; click on "Continue".

Update the narrative if needed. Click "Save & Add/Manage FRN Line Items" to update costs if needed. If there is no change, click on "Save & View FRNs".

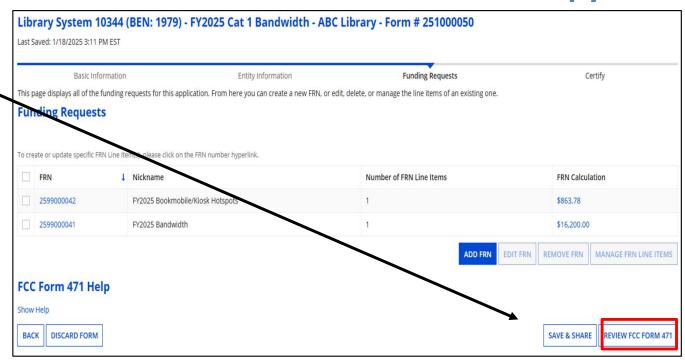


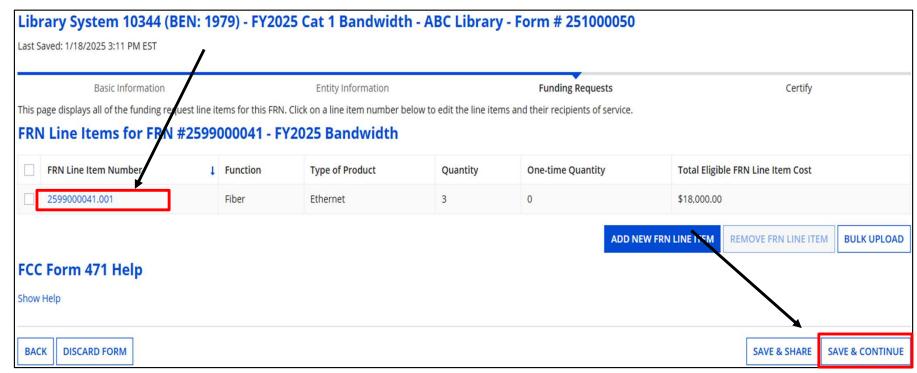


CONTINUE

"Save & View FRNs" If no changes are needed, click on "Review FCC Form 471".

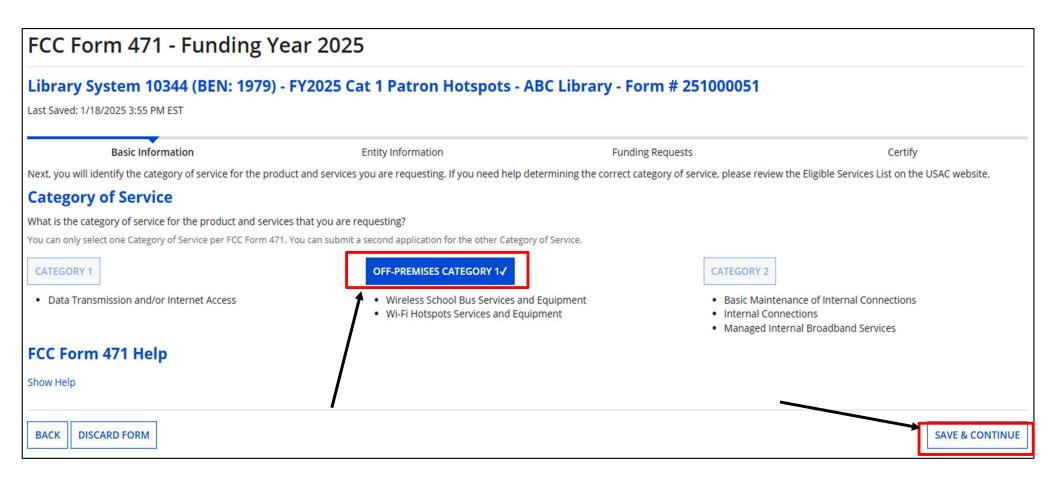
If you clicked on "Manage FRN Line Item", click on the line-item number to edit, and update information. Click on "Save & Continue" to return to Funding Requests.





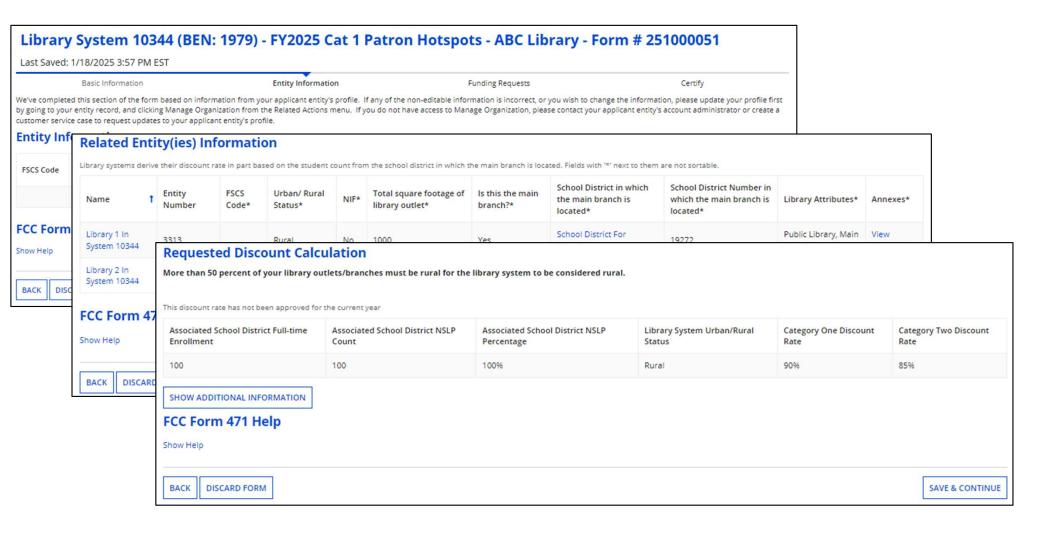
# Off-Premises Category 1 Form 471

#### **Off-Premises Category 1 Form 471**



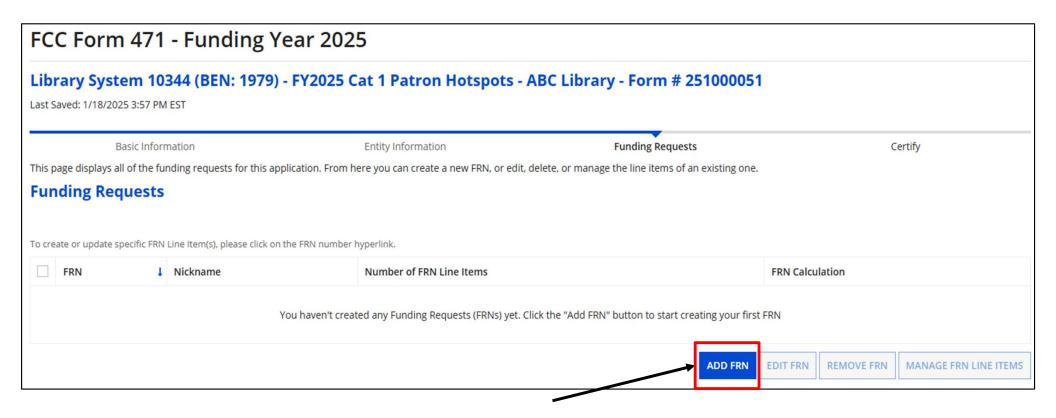
Follow previous steps to start a Form 471. At "Category of Service," click on "Off-Premises Category 1" and "Save & Continue."

#### **Off-Premises Category 1 Form 471**



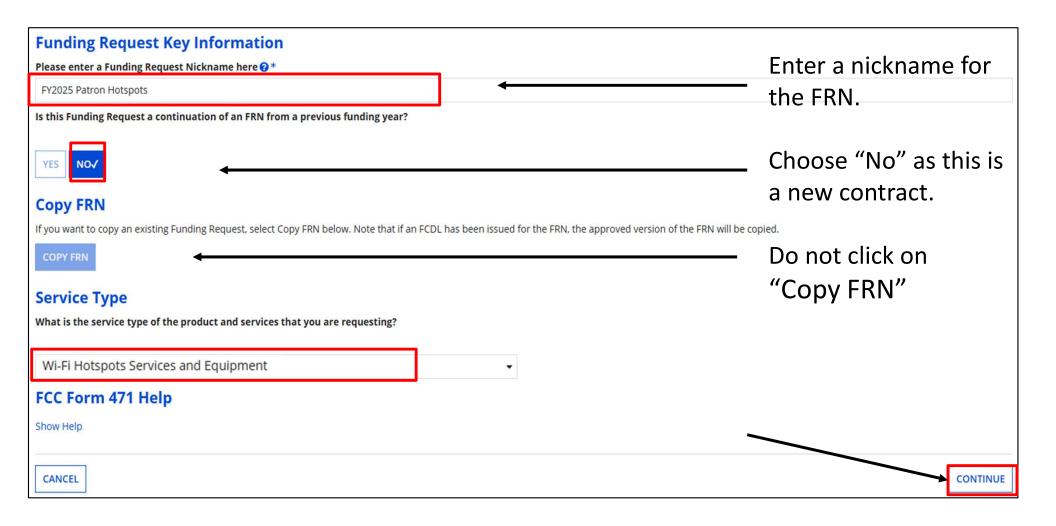
You will see the Related Entities and Requested Discount Calculation. Click on "Save & Continue" for each.

#### **Off-Premises Category 1 Form 471**



Click on "Add FRN" to begin.

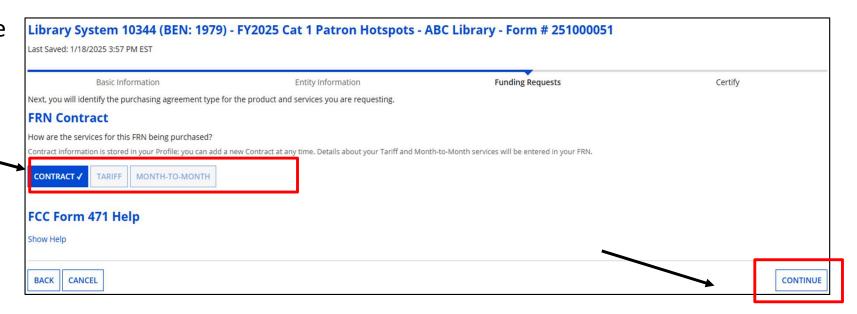
#### **Funding Requests – Part 1**

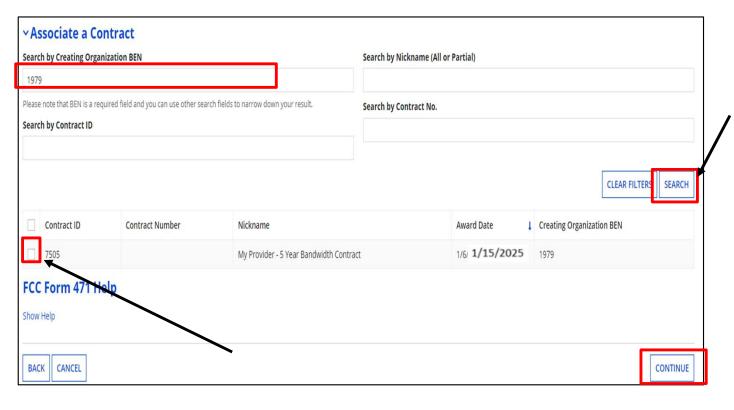


Under "Service Type" you will see the option for Wi-Fi Hotspots or Wireless School Bus. Select "Wi-Fi Hotspots Services and Equipment." Click on "Continue."

#### **Funding Requests – Part 1**

Choose how the services will be purchased and click on "Continue".

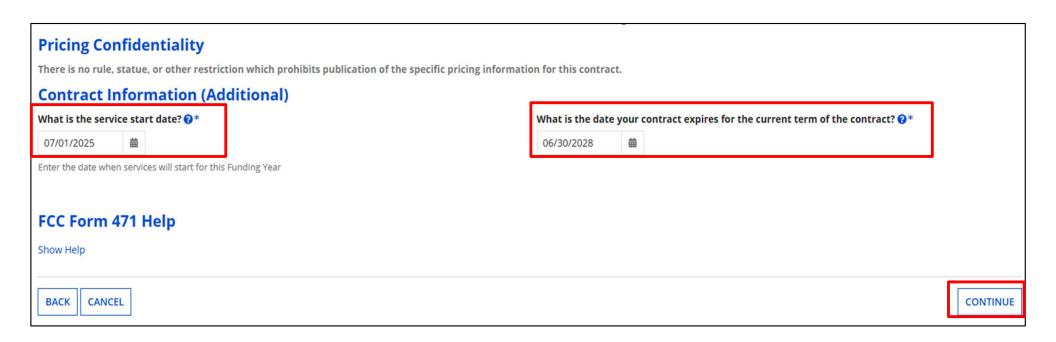




If "Contract" was indicated, search for the associated contract that was uploaded previously.

Enter search criteria and click on "Search". Results will be listed in a grid below. Click box to select contract. The summary will display below.

#### **Contract Summary**

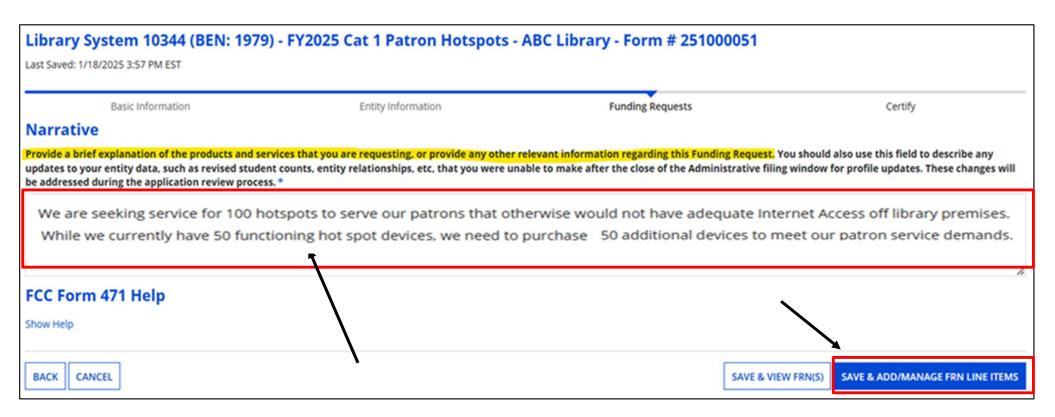


Verify the service start date; that's auto-populated. The default is 07/01/2025 for the upcoming funding year.

Enter the date the contract expires for the current term of the contract, not including extensions.

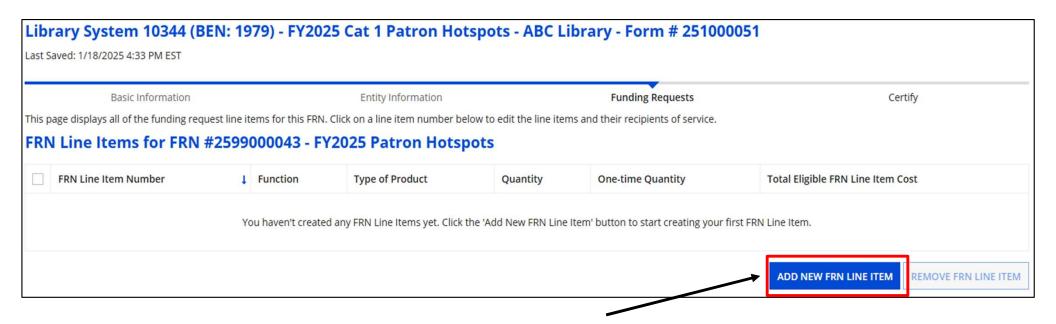
Once completed, click on "Continue"

#### **Funding Request Narrative**



Provide a brief description of the products and services you are requesting. Click on " SAVER ADDIMANAGE PROLUMENTERS " to begin "Part 2" entering the **key information for your funding request**.

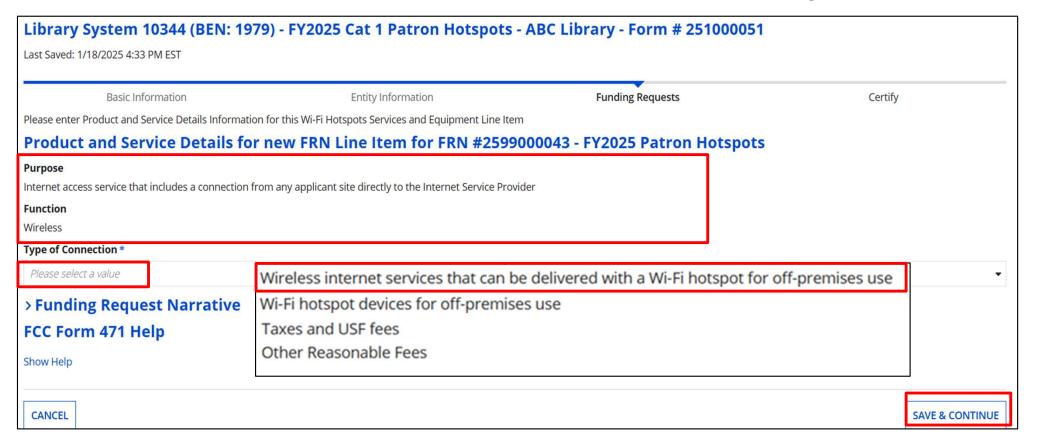
#### **Adding FRN Line Items**



Click on "Add New FRN Line Item."

Remember that if you are requesting hotspot service, equipment, and taxes, if indicated, you will need to add multiple FRN line items.

#### **Product/Service Details**



"Purpose" and "Functions" are auto-populated. Select "Type of Connection," then click on "Save & Continue."

Note: "Taxes and USF fees" are not part of the \$15/month cap. However, "Other Reasonable Fees," such as a setup fee, are part of the capped monthly service cost.

#### **Cost Calculations**

Basic Information	Entity Information	Funding Requests	Certify
		ow are required. Please enter zero if funds are not requested f	or that field.
ost Calculation for new FRN Line	ltem for FRN #2599000043 - FY20	25 Patron Hotspots	
Monthly Cost		One-Time Cost	
Monthly Recurring Unit Cost	\$15.00	One-time Unit Cost	\$0.00
Monthly Recurring Unit Ineligible Costs	\$0.00	One-time Ineligible Unit Cost	\$0.00
Monthly Recurring Unit Eligible Costs	= \$15.00	One-time Eligible Unit Cost	= \$0.00
Monthly Quantity	100	One-time Quantity	(
Total Monthly Eligible Recurring Costs	= \$1,500.00	Total Eligible One-time Costs	= \$0.00
Months of Service	x 12	Summary	
Total Eligible Recurring Costs	= \$18,000.00	Total Eligible Recurring Costs	\$18,000.00
		Total Eligible One-time Costs	+\$0.00
		Pre-Discount Extended Eligible Line Item Cost	= \$18,000.00
More Help with the Costs Above			
CC Form 471 Help			
now Help			

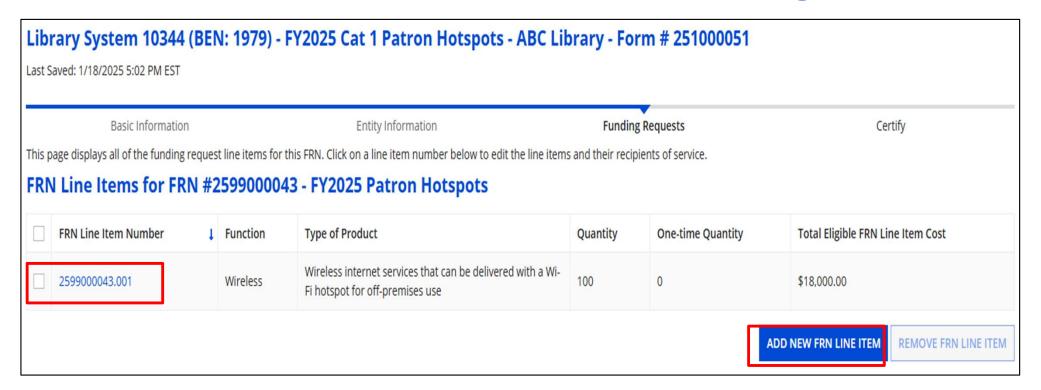
Enter monthly recurring cost information on the left-hand side of the screen. Fields cannot be left blank. If there is no cost, enter zero. When completed, click on "Save & Continue."

#### **Manage Recipients of Service – Shared Service**



Indicate which entities will provide hotspot service to their patrons. If all entities will, click on "Yes." If "No," check the box to the left of the site's receiving service and click "Add." When done, click on "Save & Continue." You'll see the recipients selected. Click on "Save & Continue" again.

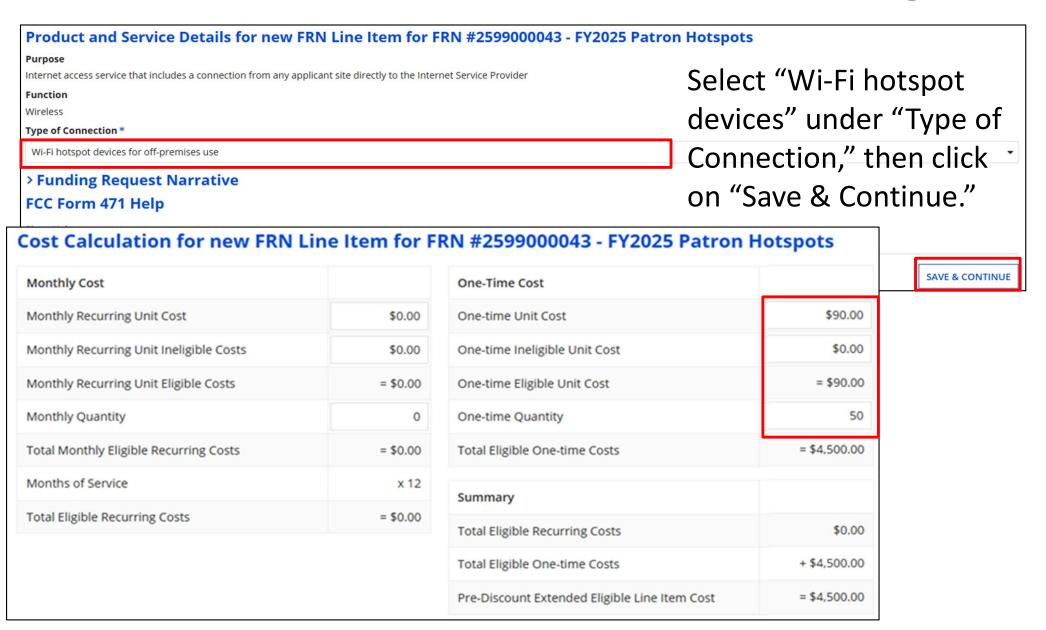
#### **Adding FRN Line Items**



The grid shows the completed item. If you need to edit information in the line item, click on the FRN Line-Item Number.

If additional Line Items are needed for this Funding Request, click "Add New FRN Line Item". If done, click on "Save & Continue".

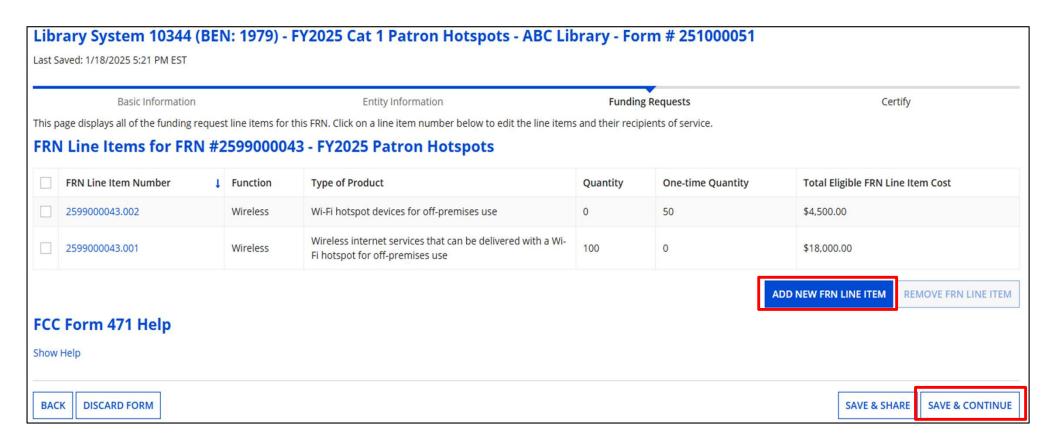
#### **Product/Service Details – Adding Devices**



Enter one-time equipment cost information on the right-hand side of the screen. Enter zeros under Monthly Cost on the left. When completed, click "Save & Continue" and select Recipients of Service.

91

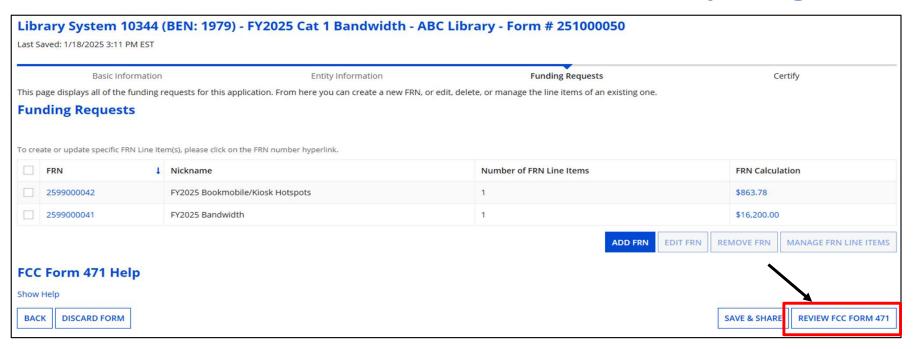
#### **Adding FRN Line Items**



Continue adding line items if needed. If adding Taxes and USF Fees, use the Monthly Cost portion of the screen as before. If there is a setup fee per hotspot, enter the cost under One-Time Cost. When done, click on "Save & Continue."

# Completing the Form 471

#### **Completing the Form 471**



Library System 10344 (BEN: 1979) - FY2025 Cat 1 Bandwidth - ABC Library - Form # 251000050  Last Saved: 1/18/2025 3:11 PM EST					
FCC Form 471 Draft version of the PDF generation is in a click 'Resume Task Later' to close the current screen, an		ase click 'Refresh' once or twice a minute to check if the Pl certification process.	DF generation is complete. If you don't want to wait,		
			RESUME TASK LATER REFRESH		

To complete/submit your Form 471, click on "Review FCC Form 471" and "Yes" to the popup. Instead of being taken out of the Form 471 like we see with the Form 470, you must click on "REFRESH" to receive the draft version of the form and it. Be patient, it may take a little while to display.

You can click on " RESUME TASKLATER " if you prefer to complete at a later time.

#### **Funding Requests**



If you chose the "REFRESH " option, click on the draft document to view the PDF. If necessary, click on "Edit Form" to make corrections.

Click the box just below the document to certify if correct. You can then click on "Continue to Certification" or "Send for Certification" to complete the application.

95

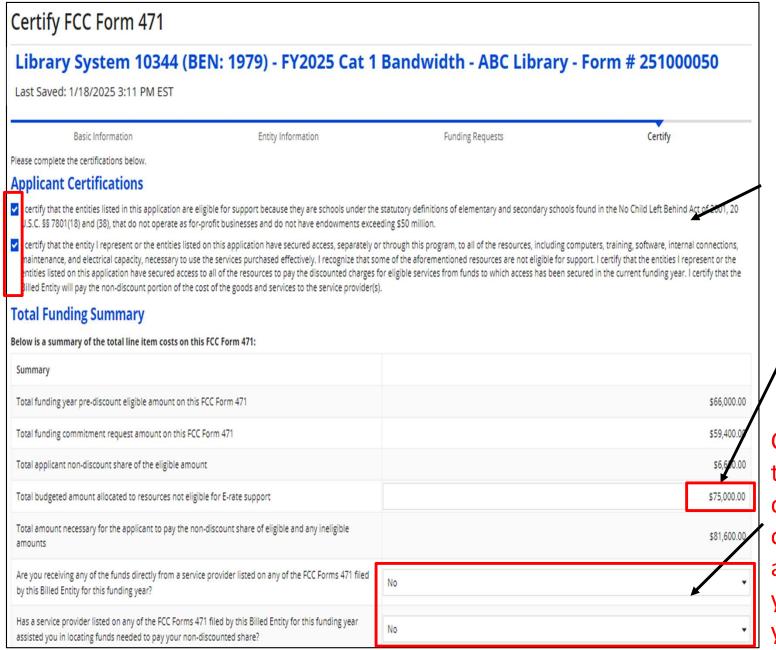
#### **Funding Requests**



If you clicked on "RESUME TASKLATER", click on "Tasks" on the blue menu bar to find the newly created task.

Click on the "Review PDF for FCC Form 471" to continue.

#### **Certifying the Form 471**



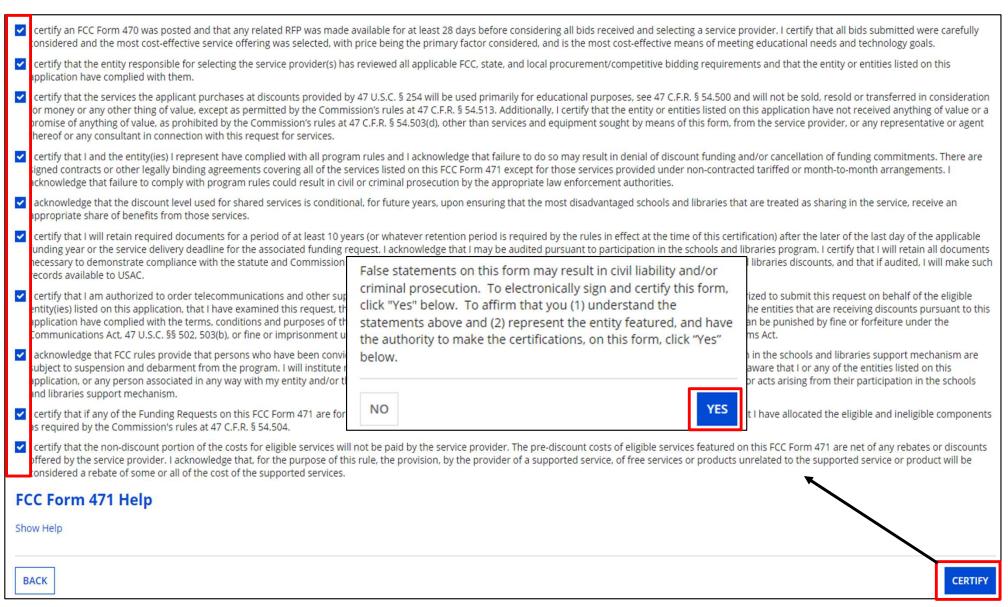
After reading the certifications, check the boxes.

Enter your budget amount.

Click on the pull-downs to answer the "gotcha" questions. Be very careful!! Remember, it's a program violation if you receive funds from your service provider!!

Just say no!!

#### **Certifying the Form 471**

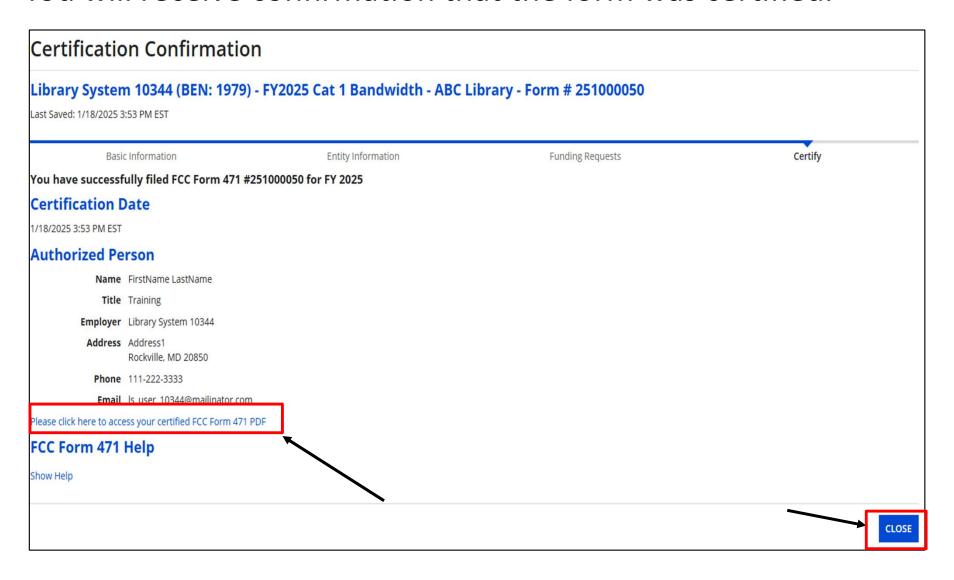


Continue checking all boxes.

When done, click on "Certify", and then "Yes" in the pop-up.

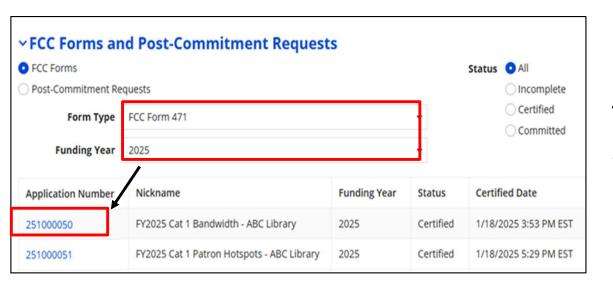
#### **Certifier Information**

You will receive confirmation that the form was certified.



Click the link to access a PDF copy of your certified Form 471. Click on "Close" when done.

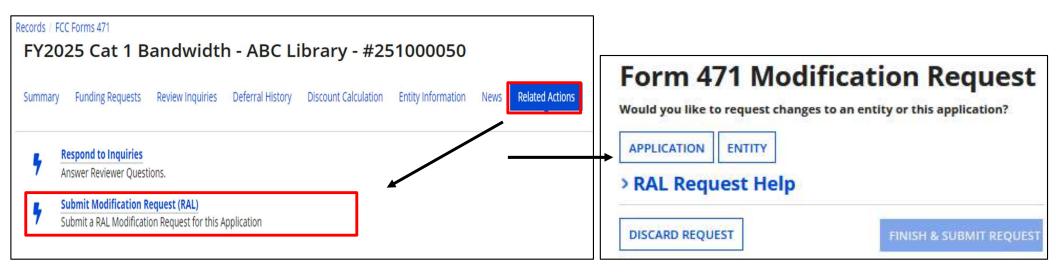
# After the Form 471 - Next Steps



# Finding Your 471 & Making Corrections

To find a submitted Form 471, scroll down to the bottom of the Landing Page, select 471 as "Type" and 2025 for "Funding Year".

Click on the Application Number.

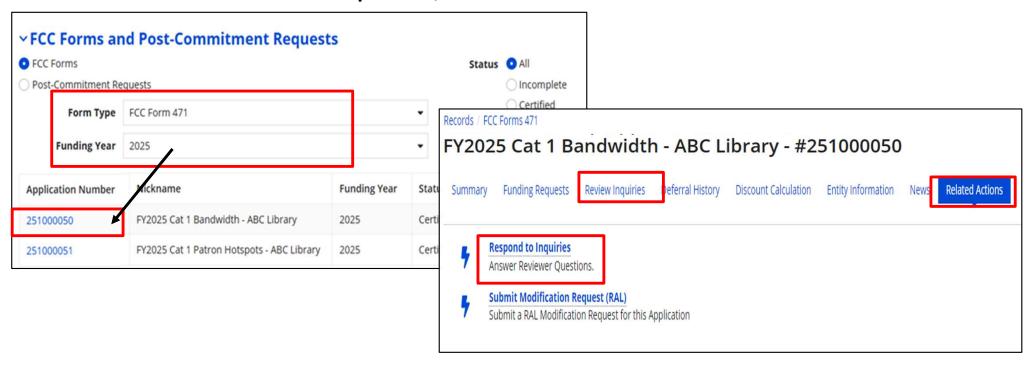


To make corrections after your Form 471 has been certified, submit a RAL Modification Request. For details on how to submit, see "Submitting Form 471 RAL Corrections" on my website for a step-by-step guide covering various scenarios at <a href="https://www.ohio-k12.help/erate/e-rate-resources/">https://www.ohio-k12.help/erate/e-rate-resources/</a>.

## **Application Review - PIA**

Program Integrity Assurance (PIA) will review your application after it is submitted and communicate with you through EPC.

To look for Review Inquires, search for 471 as before:



Click on "Review Inquires" or "Related Actions" and then "Respond to Inquires".

## **Application Review - PIA**

#### Reviewers

- verify the eligibility of the schools and libraries and their discount levels.
- verify that the services requested are eligible for E-Rate discounts.
- communicate with you with requests for additional documentation.
- may ask for additional verification of your compliance with program rules.
- You are given an opportunity to make allowable corrections to your form.

# **Application Review - PIA**

- Have documentation ready
- Respond to inquiries and provide information promptly, by the deadline (usually 15 days)
- Ask for clarification if you are unsure what is needed
- Ask early for an extension if you need it
- Put responses in writing
- Document all responses

# **Funding Decision**

The Funding Commitment Decision Letter (FCDL) is a letter issued by USAC to both the applicant and the service provider that contains decisions on their funding requests. You'll receive an email when it is issued. The letter states which funding requests of the Form 471 are approved or denied.

Applicants and service providers should carefully review their FCDL for details on approved or denied requests and any adjustments made to the original requests, as well as next steps (such as the deadline for filing an appeal which is 60 days for the date of the FCDL).

## **Change Options To Be Aware Of**

Funding Request Report | FCC Form 470 | FCC Form 471 | FCC Form 486 | Appeal | IDD Extension | FCC Form 500 | SPIN Change | Service Substitution | Manage Users | Manage Organizations | EPC E-Rate Invoicing | USAC Website | Contact Us | Help

#### **SPIN Changes**

 If you enter the wrong SPIN, the company merges with another, or your chosen vendor can't provide the service.

#### **Service Substitutions**

 If you entered incorrect service information, or you are making an allowed change to the service, use this to notify USAC of the change.

#### FCC Form 500 - Use this form if you need to do the following:

- Change service start date
- Change contract expiration date
- Cancel funding request
- Reduce funding request
- Submit service delivery extension request (non-recurring)



Questions?!!

# **Contact Information**

## **E-Rate Support and Information**

#### **Lorrie Germann:**

<u>lgermann@ohiocsc.org</u> **or** <u>lorrie.germann@education.ohio.gov</u>

www.ohio-k12.help/erate

Call: 740-253-1153

