



Schools and Libraries (E-rate) Program

FCC Form 471 Quick Filing Guide

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SCHOOLS AND LIBRARIES (E-RATE) PROGRAM

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Quick Filing Guide

FCC Form 471

Description of Services Ordered and Certification Form

Getting Started

Before you can file the FCC Form 471, you must set up your user account in the [E-rate Productivity Center \(EPC\)](#) customer portal and create a password, log in, and accept the terms and conditions for using EPC.

- If you received an email from USAC telling you that you can log in to EPC but you have not done so, use the instructions in that email to log in, create a password, and accept the terms and conditions.
- If someone in your organization is already set up as an account administrator, that person can create your user account. Follow the login process noted in the emails you receive, create a password, and accept the terms and conditions.
- If you have not received an email from USAC or you are not sure where to start, call the Client Service Bureau (CSB) at (888) 203-8100 for assistance.

Review and Update Entity Profile Information

Review and update your entity profile information. Having an up to date and accurate profile is important because much of this information is imported directly into your FCC Form 471.

- Log in to [EPC](#).
- From the **My Entities** section of the landing page, click your organization's name.
- Review the information displayed.
- To update information for your organization, click **Manage Organization** at the top of the page. Fields with a red asterisk are mandatory.
 - If one or more non-instructional facilities (NIF) are missing from your list of entities, call CSB for assistance.
 - If you do not have an FCC Registration Number, register on the FCC's [CORES website](#).
 - Independent Schools/School Districts:
 - Make sure that your student numbers are updated for each of your schools. Include the CEP percentage if you participate in CEP. (You can update the information for each school by clicking on its name in the **My Entities** section of the landing page and then clicking **Manage Organization** at the top of that entity's page.)
 - Also check the urban/rural status of each school – you can enter the urban/rural status if it is incorrect.

- Independent Libraries:
 - Check the main branch box and identify the public school district in which the independent library is located.
 - Also check the urban/rural status of your library – you can enter the urban/rural status if it is incorrect.
 - Make sure that your library square footage information is correct.
- Library Systems:
 - Designate the main branch and the public school district in which the main branch library is located. There can only be one main branch library. (You can update information for a library by clicking on its name in the **My Entities** section of the landing page and then clicking **Manage Organization** at the top of that entity’s page.)
 - Also check the urban/rural status of each library – you can enter the urban/rural status if it is incorrect.
 - Make sure that your library square footage information for each library is correct.
- To add an annex, click **Related Actions** in the left-hand menu and then **Manage Annexes**.
- If you have one or more contracts, enter this information by clicking **Related Actions** and then **Manage Contracts**.
- Answer your connectivity questions by clicking **Related Actions** and then **Manage Connectivity Questions**.
- Consortia:
 - Log in to [EPC](#).
 - From the **My Entities** section of the landing page, click your consortium name.
 - Review the information displayed. To update information for the consortium, click **Manage Organization** at the top of the page. Fields with a red asterisk are mandatory.
 - If you do not have an FCC Registration Number, register on the FCC’s [CORES website](#).
 - To review the list of your consortium members, go to **My Landing Page**.
 - Click your consortium name.
 - Click **Additional Information** in the left-hand menu.
 - From the **Category** dropdown, select **Related Organizations**.
 - From the **Relationship Type** dropdown, select **Consortia Members**.
 - If one or more members are missing from your list, you can add them by clicking **Related Actions**, then **Manage Organization Relationships**, then **Add Consortium Member**. You can then search by BEN, full or partial name, and/or state.
 - If you have one or more contracts, enter their information by clicking **Related Actions** and then **Manage Contracts**.
 - Consortia applicants do not answer **Connectivity Questions**.

Start Your FCC Form 471

From **My Landing Page**, click **FCC Form 471**. The system will automatically populate the form with your information, based on your profile.

- Create an **Application Nickname** of your own choosing to facilitate communication with us about this form. Choose a nickname that will help you reference this form.
- Identify the main contact person that USAC can reach out to with questions about this form. This can be you or any other user in your organization.
- Choose the category of service for this form – Category One or Category Two.
 - You cannot change your selection after you leave this page.
- Review your entity and discount information.
 - Independent Schools/Libraries: The system will use your profile to automatically populate your entity and discount information. If any information is incorrect, you must return to your profile to correct it.
 - School Districts: The system will update your form with your individual schools' profile information. If any of their information is incorrect, you must return to their profiles in your organization account to correct it.
 - Library Systems: The system will update your form with your individual libraries' profile information. If any of their information is incorrect, you must return to their profiles in your organization account to correct it.
 - Consortia: Choose your member organizations that this application will feature. This action will not change the member list that is featured in your profile. Removing one or more member organizations from this application may change your discount level for all of the services you have requested on this application.
 - If this application will feature all of your consortium members, click **Yes**.
 - If this application will not feature all of your consortium members, click **No**.
 - The system will display a list of your members. Check the box to the left of the name of each member that you want featured on this application.
 - The system will display information about the members listed on your organization account and their associated discounts. Note that you cannot edit your members' profiles.

Add a Funding Request

Adding a funding request is a two-step process. For each addition you must create an FRN (funding request number) and then create one or more FRN line items to provide the details.

- First, click the green **Add FRN** button. Create a nickname for your FRN, choose its service type, and click **Continue**.
 - If you choose **Contract**, you can choose the appropriate contract from the information you already entered in your profile.
 - If you choose **Tariff** or **Month-to-Month**, provide the details requested on your service.
 - You will then return to the **Funding Requests** page.
- Second, click the hyperlinked FRN and then select the green **Add New FRN Line Item** button, and enter the information requested.

- When you reach the Cost Calculation screen:
 - The entry in the first field for recurring costs (left-hand side) is the total (eligible + ineligible) cost of one unit (e.g., one connection, line, or circuit) of the recurring service.
 - The entry in the first field for one-time costs (right-hand side) is the total (eligible + ineligible) cost of the one-time service (or one unit, if there are multiple pieces of equipment).
 - You must provide an entry in each cost calculation field, even if it is zero.
- Check the final **Pre-discount Extended Eligible Line Item Cost** figure to make sure it is close to your estimate for the total eligible costs for that line item.
- For Category One services, the next screen will ask you to allocate the number of “units” (connections, such as telephone lines or circuits or Internet lines or circuits). This is the number you entered in the **Monthly Quantity** field in the **Cost Calculation** section for this FRN line item.
 - NOTE: For an independent school or library, the form assumes the school or library receives all of the services.
- For Category Two services, the next screen will ask you to allocate the total costs for this FRN line item among the entity or entities receiving or sharing the service.
- Third, review the **Connectivity Questions**.
 - The system will automatically populate the form with the answers you provided in your profile. If any information is incorrect, you must return to your profile to correct it.
 - Consortia do not need to answer these questions.

Review Your Completed Form

- If you are ready to review your form, click the **Review FCC Form 471** button at the bottom of the **Connectivity Questions** screen.
- When a PDF of the form is available, the system will generate a task and email notification for all full- and partial-rights users.
- Review the PDF. If you need to make changes, click **Edit Form**.
 - To make changes to the form, return to the **Tasks** tab and click on the task.
 - You can also find the task on **My Landing Page**.
- If you are a partial-rights user, approving the PDF will notify the full-rights users in your organization that the form is available for certification. If you are a full-rights user, you can certify the form yourself or allow another full-rights user to pick up the task.

Certify the Form

- After you have reviewed the PDF and made any necessary changes, click the **Continue to Certification** button.
- Enter the amount set aside in your budget for necessary resources (e.g., computers, training, software, electrical capacity) that are not eligible for E-rate Program support but are necessary for you to use the E-rate Program discounted services effectively.
- You must check every certification before you can certify the form.

Next Steps

- You can view and print your form by clicking on the link at the bottom of your Receipt Acknowledgment Letter (RAL), which is located under your **News** tab.
- If you need to make RAL corrections, go to your form and click **Related Actions** in the left-hand menu.