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Universal Service
Administrative Co.

Schools and Libraries Program News Brief

January 26, 2018

TIP OF THE WEEK: For applicants who want a better understanding of how to file an online FCC Form 471, we have created a [series of FCC Form 471 instructional videos](#). By watching the videos, you will be able to see how to file this form for both Category One and Category Two services.

Commitments for Funding Year 2017

Funding Year 2017. USAC is scheduled to release Funding Year (FY) 2017 Wave 38 Funding Commitment Decision Letters (FCDLs) on February 2. As of January 26, FY2017 commitments total over \$2.12 billion.

On the date that FCDLs are issued, you can access your FCDL notification from the **Notifications** section of your landing page in the E-rate Productivity Center (EPC).

Phone Menu Improvements for FCC Form 498 Team

Program participants can call USAC's FCC Form 498 Team (also known as the Customer Service Center or Customer Support) for assistance with questions about the FCC Form 498 and the payment status for approved invoices. In the past, calls to the main telephone number for this team (888-641-8722) came mostly from service providers, and the choices offered in the phone menus were organized around their most common questions.

Now that applicants are also certifying FCC Form 498 to provide their banking information so that USAC can pay them directly, the call volume from applicants has increased significantly. To better guide both applicants and service providers to the resources best able to help them, the FCC Form 498 Team will simplify its phone menus in the near future.

When you call the main number, you must first choose the program you have questions about. For information on the Schools and Libraries Program, choose option 3. When the phone menus are updated, you will then have two choices:

- The message for option 1 is "If you are a school, library, or service provider and need E-rate Program assistance, including assistance with filing Forms 473, 474 or invoicing, press 1." Choose this option for general program information, guidance on filing program forms, form status inquiries, and assistance with EPC. All of these calls will be forwarded to our Client Service Bureau (CSB). You can also call them directly at 888-203-8100.

- The message for option 2 is "For assistance with your Form 498, logging into E-File or for disbursement status of an approved invoice, please press 2." Choose this option to check the status of your certified FCC Form 498 or the payment status of an approved invoice – FCC Form 472 (BEAR Form) or FCC Form 474 (SPI Form). All of these calls will be answered by a member of the FCC Form 498 Team.
- NOTE: If you want to inquire about the status of an approved invoice, you must first call CSB at 888-203-8100 to get the "USAC Sent Date" (the date the invoice was approved for payment). With this date and your identifying information (total dollar amount requested, Billed Entity Number, FCC Form 471 number, Funding Request Number), you can then call the FCC Form 498 Team to get the payment status. Please note that in some cases an invoice with a USAC Sent Date still requires additional review, so the FCC Form 498 Team may not always be able to provide a status.

Reminders on the Competitive Bidding Process and the FCC Form 470

The FCC Form 470, Description of Services Requested and Certification Form, is the first program form that applicants file. This form opens your competitive bidding process, which is a formal process to identify and request the products and services you need so that potential service providers can review those requests and submit bids for them. You provide this information on the FCC Form 470 and any additional documents, such as a request for proposal (RFP).

Applicants who are requesting services under the E-rate Program for FY2018 must file an FY2018 FCC Form 470 unless they meet one of the following conditions:

- The eligible services for which you want to request discounts are already covered by a multi-year contract that was signed pursuant to an FCC Form 470, whether you filed this form yourself or you are eligible to purchase services from a contract that cites an FCC Form 470 filed by a state government or other similar agency.
- You are requesting [commercially available, business class internet access that meets certain conditions](#).

Below are some reminders to help you through the competitive bidding process.

The competitive bidding process must be open and fair.

It is the applicant's responsibility to run an open and fair competitive bidding process.

- All bidders must be treated the same.
- No bidder can have advance knowledge of the project information.
- There are no secrets in the process – such as information shared with one bidder but not with others – and all bidders know what is required of them.
- With limited exceptions, service providers and potential service providers cannot give [gifts](#) to applicants.
- The value of [free services](#) (e.g., price reductions, promotional offers, free products) generally must be deducted from the pre-discount cost of services.

All RFPs and RFP documents must be attached to the FCC Form 470.

You can issue an RFP or similar document in addition to the FCC Form 470. In general, an RFP is a formal bidding document that describes the project and requested services in sufficient detail so that potential bidders understand the scope, location, and any other requirements for the project. However, we use "RFP" or "RFP document" generically to refer to any document you issue as part of the competitive

bidding process that describes your project and requested services in more detail than in the fields provided on the FCC Form 470.

Generally, you are not required to issue an RFP unless your state or local procurement rules or regulations require you to do so. However, if you have issued or will issue an RFP or RFP document, you must upload that document to your FCC Form 470 in EPC.

RFP documents issued after an FCC Form 470 is certified must also be uploaded to your form. (Note that you cannot upload an RFP document if one was not already uploaded to the form before the form was certified.) To upload an additional RFP document after certification:

- From the **FCC Forms and Post-Commitment Requests** section of your landing page in EPC, use the search criteria provided to locate your form.
- Click the form nickname to access your form.
- From the **Related Actions** menu at the top of your form, choose **Add an RFP Document**.
- Follow the prompts to upload the RFP document and indicate which of your service requests are covered by the document.
- When you are finished, click the **Submit** button at the bottom of the page.

Applicants must wait at least 28 days after the FCC Form 470 is certified.

You must wait at least 28 days after the FCC Form 470 is certified before you choose your service provider(s), sign a contract (for services other than those provided under tariff or on a month-to-month basis without a contract), and certify the second program form, the FCC Form 471, Services Ordered and Certification Form, in EPC.

February 22, 2018, is the last day that you can certify your FY2018 FCC Form 470 and still accomplish these tasks before the FCC Form 471 application filing window for FY2018 closes at 11:59 PM EDT on March 22, 2018. Note that you must do **all** of these tasks on March 22 if you waited until February 22 to certify your FCC Form 470.

Keep the following in mind:

- If you end up signing a contract, you must create a contract record in your profile in EPC for that contract before you can cite that contract on your FCC Form 471. You cannot create a contract record that cites an FCC Form 470 if that form has not been posted for at least 28 days.
- On the FCC Form 471, you cannot cite an FCC Form 470 that has not been posted for at least 28 days.
- Also on the FCC Form 471, you must cite an FCC Form 470 that was posted for the same service type(s) as the service(s) you are requesting. If you are not sure which service type your services fall under, post your services under both applicable service types and put a note in the narrative in each FCC Form 470 service request that explains why you have posted for both service types. The service types available on the FCC Form 470 are:
 - Internet Access and/or Telecommunications Services (voice services are included in this service type on the FCC Form 470)
 - Internal Connections
 - Basic Maintenance of Internal Connections
 - Managed Internal Broadband Services.

Some changes may require the posting of a new FCC Form 470.

In general, if you are making one or more significant ("cardinal") changes that are outside the original scope of your competitive bid, you should file a new FCC Form 470. Service providers that are not interested in bidding on the services contained in the original scope of your project or services may be interested in bidding on your changed scope, and vice versa.

For certain changes, you MUST post a new FCC Form 470. Here are some examples:

- You certified your FCC Form 470 without attaching any RFP documents, but have now issued an RFP document and need to attach it.
- You did not post services for a service type, and now realize that you need to post for services in that service type.
- Your state or locate competitive bidding rules and regulations require you to post a new form.

If your changes can fit into the description of your existing FCC Form 470 – and you attached at least one RFP document to your original form – you can add one or more RFP documents to provide information about the change(s) you want to make. However, if your changes are significant, you must restart your 28-day clock. You must count out the 28 days yourself, because we will not know if your new document contains a cardinal change or simply a clarification.

We encourage you to post a new FCC Form 470 if you are making changes, just to avoid any confusion. If you attached an RFP document to your original form, you can attach a document noting the cancellation of that form and referring potential bidders to your new FCC Form 470.

For additional information on the competitive bidding process, review the guidance documents linked to the [Applicant Process Step 1: Competitive Bidding](#) on the USAC website. We have also posted [FCC Form 470 videos](#) in the [Online Learning Library](#) that demonstrate how to complete and certify an FCC Form 470 and how to use our online search tools to locate posted FCC Forms 470.

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