

In-Person E-Rate Training October 29, 2024



Access Today's Training
Materials



Nearby Lunch/Coffee
Options



Housekeeping:

- Beverages are allowed in the meeting room
- Restrooms are to the right when exiting the meeting room
- Our first break will be at approximately 11:00 a.m.

Today's Agenda: Part 1

Topic	Presenter	Time*	Details
Introduction	Catherine Willis	9:30-9:35	Welcome and housekeeping items.
Program Overview and FY2025 Program Updates	Catherine Willis	9:35-10:20	E-Rate program summary and updates for Category Two (C2) Budget Management, Wi-Fi Hotspots, and FCC Form 470.
Eligible Services	Bernie Manns	10:20-11:05	Eligible services list review, types of eligible service, BMIC details, advance installation and basic fiber concepts.
Break		11:05-11:20	
Improving E-Rate	Open Discussion	11:20-12:10	A listening session for attendees to share what's going well, how E-Rate can improve program administration, and answer your questions.
Lunch		12:10-1:25	

Today's Agenda: Part 2

Open Data	Jessie Stern	1:25-2:10	An overview of E-Rate Open Data tools and uses.
Competitive Bidding	Shawn Jensen	2:10-2:55	CB and FCC Form 470 overview, SP role, contracts, RFPs, Vendor communications, requirements for leased dark fiber and self-provisioned networks, evaluation matrix, CB exemptions.
Break		2:55-3:10	
Administrative Window	Ty Smith	3:10-3:55	Admin Window period for profile updates (e.g., student counts, sq. footage, new entities, Acct. Admin and consulting firm updates, user permissions).
FCC Form 471	Bernie Manns	3:55-4:40	FCC Form 471 application overview and requesting funding, application review process, and funding commitments.
Invoicing	Pam Lloyd	4:40-5:25	Invoicing overview, preparing to Invoice, filing an FCC Form 498, filing an invoice, invoice reviews, record retention and Open Data, and key takeaways.
Closing Remarks	Catherine Willis	5:25-5:30	Thank you for joining us!

*Times may fluctuate due to question-and-answer sessions

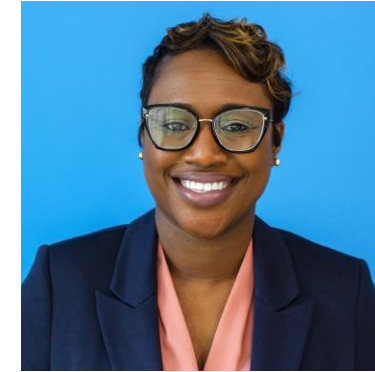
Today's Presenters & E-Rate Subject Matter Experts



Catherine Willis
Senior Director | Outreach,
Post Commit, and Invoicing



Bernie Manns
Senior Director | Pre-Commit



Tyanna Smith
Associate Manager | Call Center



Shawn Jensen
Associate Manager | Pre-Commit

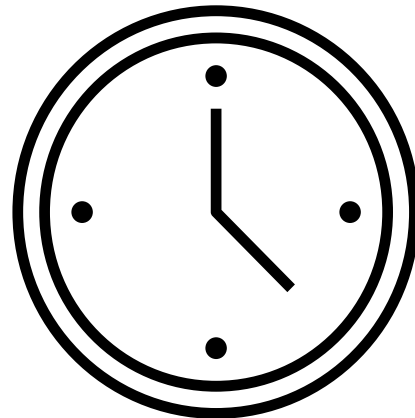
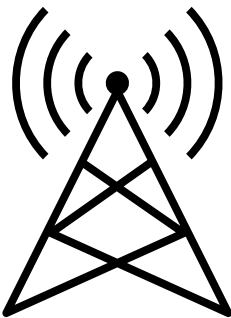
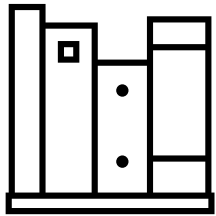
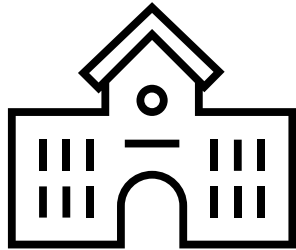


Pam Lloyd
Senior Manager | Invoicing



Jessie Stern
Communication Specialist | Outreach

Getting to Know You

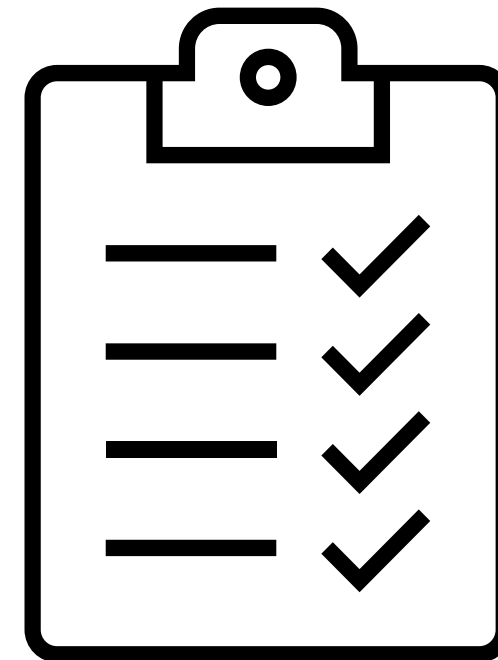




Program Overview and Updates

Overview Agenda

- Program Overview
- E-Rate Process
- Funding Year 2025: Highlights and Updates
- Program Compliance



Program Overview

Who We Are: The Universal Service Administrative Company

The Universal Service Administrative Company (USAC) is an independent, not-for-profit organization designated by the Federal Communications Commission (FCC) as the permanent administrator of the USF and its four programs.

The Universal Service Fund (USF): Exists to ensure that all people in the United States have access to quality, affordable connectivity service.



Lifeline Program

Discounted phone and internet service to eligible low-income consumers.



High Cost Program

Reduced rates for telecom and broadband services in eligible high-cost areas.



E-Rate Program

Funding for broadband services in eligible schools and libraries.

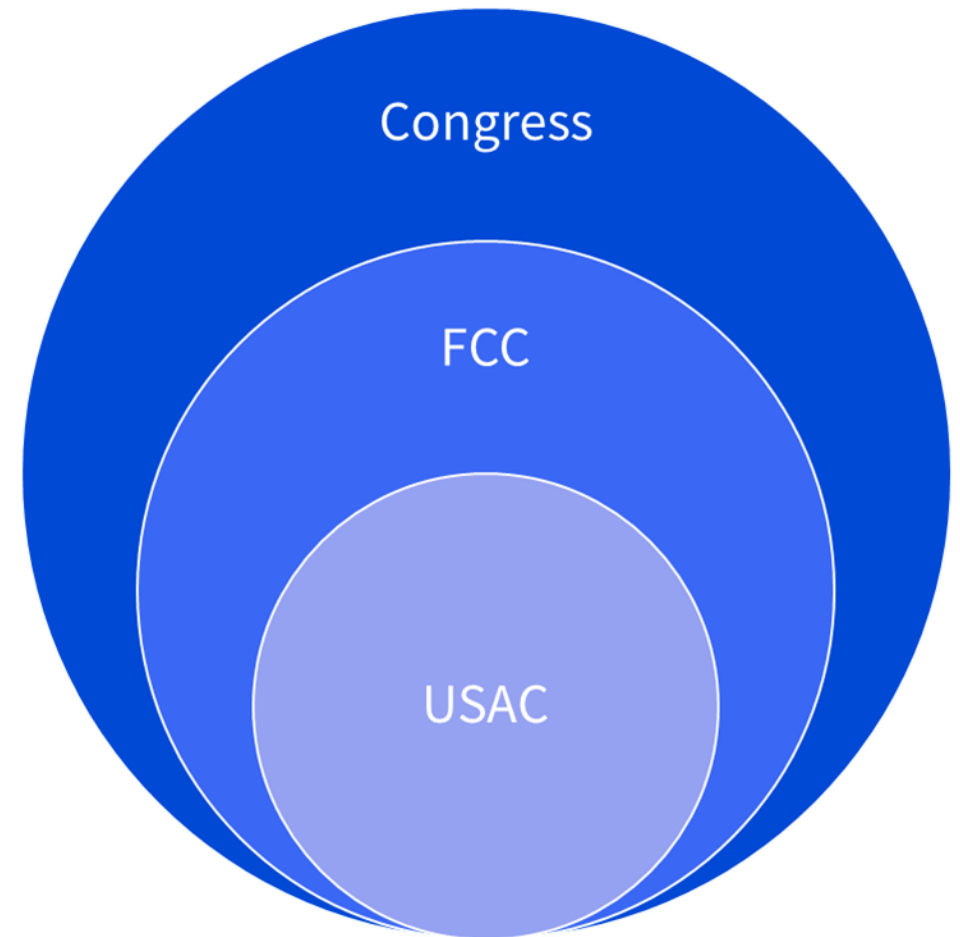


Rural Health Care Program

Funding for telecom and broadband services for eligible rural health care providers.

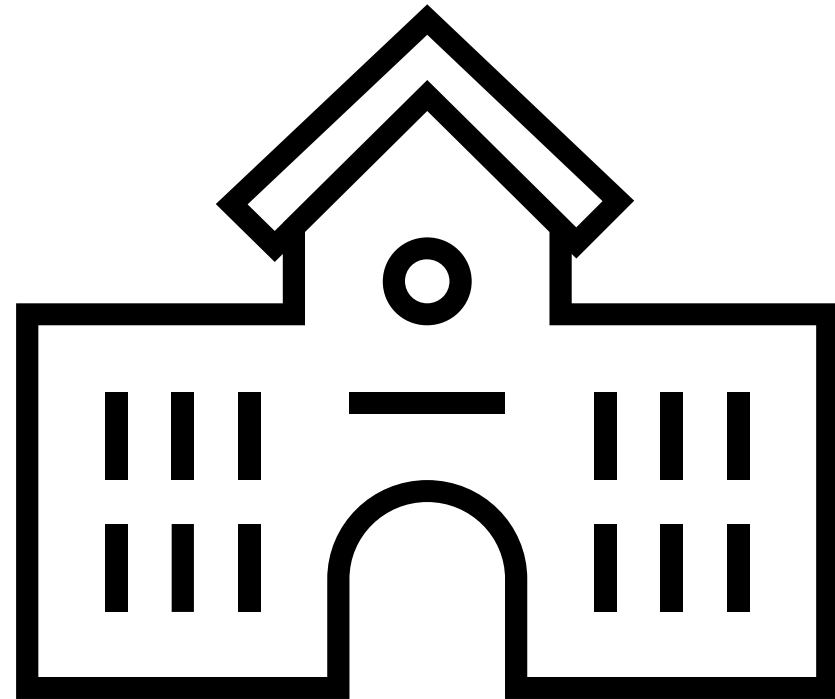
Who Makes The Rules?

- Congress enacted the Telecommunications Act of 1996, which directed the FCC to establish the E-Rate program and the other USF programs.
- The FCC sets rules and policies for the program and gives direction to USAC.
- USAC is responsible for the day-to-day administration of the E-Rate program.



What is E-Rate?

- The E-Rate program provides support to schools and libraries across the nation to obtain affordable, high-speed broadband services and internal connections to connect students and library patrons with learning opportunities and services.



How is This Accomplished Through E-Rate?

- The E-Rate Program provides **discounts of up to 90 percent** to eligible schools (K-12), libraries, and groups of schools and libraries (e.g., consortia, districts, systems) for eligible internet access, data transmission services, and internal connections (e.g., Wi-Fi equipment, cabling, and basic maintenance services) that are competitively bid and approved on the application (FCC Form 471).
- These discounts result in a reduction in the costs of the equipment and services to the schools or libraries requesting funding through the E-Rate program.
- For example: A library with a 90 percent discount rate purchasing \$1,000 in eligible broadband services would pay its 10 percent non-discount share of costs (i.e., \$100) to the service provider. The **E-Rate program would pay the remaining 90 percent (i.e., \$900)**.

E-Rate Program Overview

Provides funding to help schools and libraries obtain affordable telecommunications and Internet access.

FY2024
Program Cap **\$4.9B**

Eligible Applicants

Public and private schools (K-12), libraries, and groups of schools and libraries (e.g., consortia, school districts, library systems), as well as Tribal schools, libraries, and Tribal college and university (TCU) libraries that also serve as a public library.

Eligible Services

Schools and libraries are eligible for discounts between 20% and 90% of the costs of eligible equipment and services. The applicant pays the remaining share (e.g., a 90% applicant pays \$100 on a \$1,000 request). *Discount varies based on the school or library's level of poverty, urban/rural status, and the type of service.

CATEGORY **1** Services that support connectivity to schools and libraries. For example, data transmission and Internet access service, including special construction services for network builds.

CATEGORY **2** Services that support connectivity within schools and libraries. This includes internal connections (e.g., routers, cabling, or other equipment needed for a Wi-Fi network); managed internal broadband services (MIBS), and basic maintenance of internal connections (BMIC).

Examples of Common/ Frequent Purchases

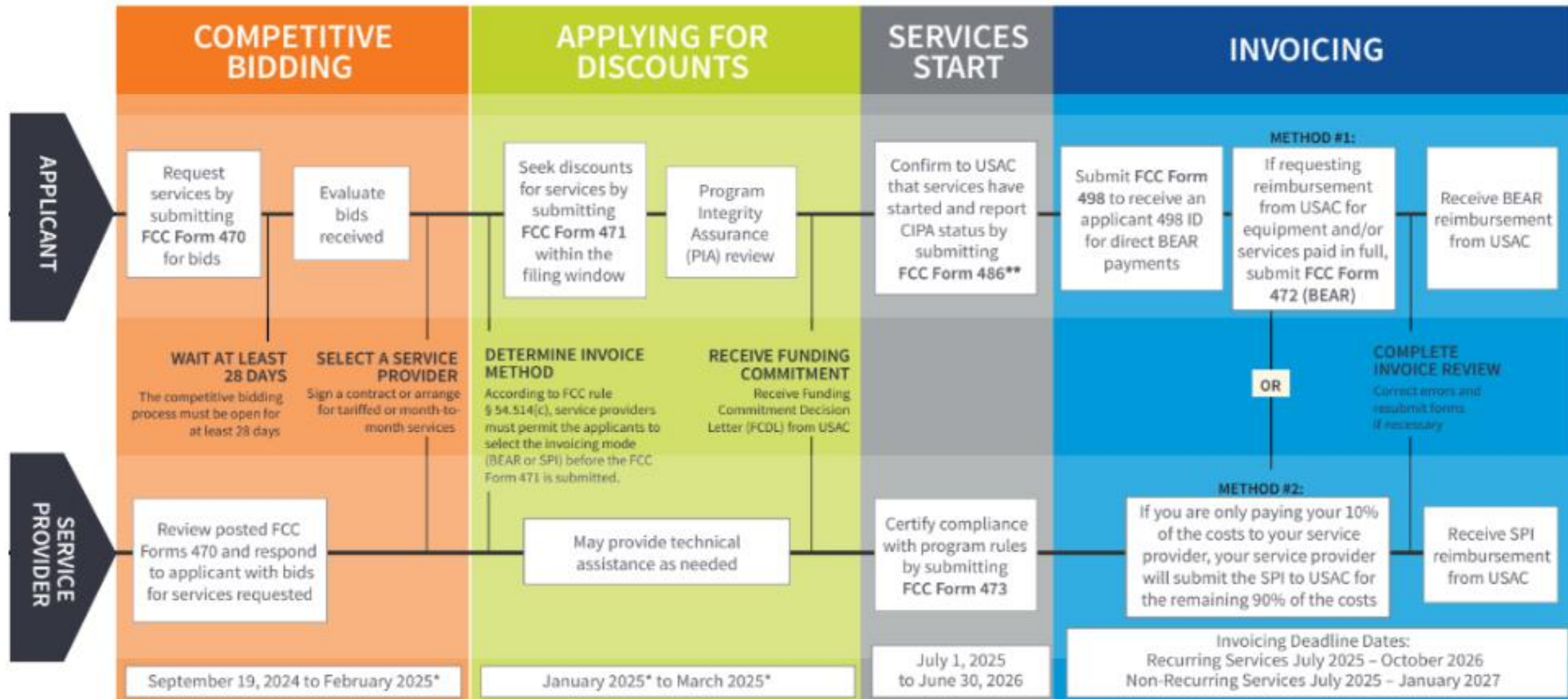
Top C1 Purchases:

- Leased lit fiber
- Internet access provided over fiber or copper
- Commercially available internet access
- Cable provider internet
- Satellite internet

Top C2 Purchases:

- Internal Connections: Cabling, routers, switches, modems, wireless access points, right to use licenses
- BMIC: repair and upkeep of eligible IC
- MIBS: Managed Wi-Fi agreements

The E-Rate Application Process: FY2025



*Date ranges reflect a typical timeline and are subject to change.

Funding Year 2025 Highlights and Program Updates

FY2021 – 2025 Category Two (C2) Budget Management

FY2025 is the last year of the FY2021-2025 Funding cycle.

- Unused funds from the FY2021 – 2025 Category Two (C2) budget will not roll over to the next budget cycle.
- Recapture your unused funds by Q1 of 2025 to make them available for your FY2025 Funding Requests (FRNs)
- Review the [FY2021-2025 Category Two \(C2\) Budget Management Guide](#) to learn how to:
 - View available FY2021-2025 C2 Funding using the [Category Two \(C2\) budget tool](#)
 - Identify unused funds, i.e., committed, but, not disbursed and are beyond their Invoicing Deadline Date (IDD) using the [E-Rate FRN Invoice Deadline Tool](#)
 - Submit an FCC Form 500 to reduce commitments of unused funds by Q1 of 2025 making unused funds available for FY2025 FRNs

Off-Premises Wi-Fi Hotspots: E-Rate Eligible

- On July 18, 2024, the FCC adopted a Report and Order ([FCC 24-76](#)) making **Wi-Fi hotspots and mobile wireless Internet services for off-premises use** eligible for E-Rate program support.
- This will allow eligible schools and libraries to start **Wi-Fi hotspot lending programs** so that their students, school staff, and library patrons with need can check out E-Rate-supported Wi-Fi hotspots and services to engage in remote learning.
- Accordingly, the FCC adopted certain limitations, including funding caps per device/service and budgets entities, to ensure Wi-Fi hotspots are more effectively targeted to those with the greatest need.

Off-Premises Wi-Fi Hotspots: Now E-Rate Eligible

- Eligible schools and libraries can receive E-Rate support for Wi-Fi hotspots and mobile wireless Internet services that can be used **off-premises** by students, school staff, and library patrons.
- **3-year C1 budget, \$90 device /\$15 plan caps, 45% annual limit**
- Wi-Fi hotspots and Internet services are **subject to all existing E-Rate rules and requirements**, including competitive bidding, cost allocation, and discounting rules.
- Applicants who entered into multi-year agreements for Wi-Fi hotspots services in the Emergency Connectivity Fund (ECF) program are not exempt from competitive bidding requirements.
- Service provider selection must be consistent with E-Rate program rules including selecting the **most cost-effective** service offering(s) and using price of the eligible equipment and services as the primary factor in the evaluation matrix.
- View the [Wi-Fi Hotspot Eligibility Webinar](#) for more details

Calculating Wi-Fi Hotspot Budget: FY 2025-FY 2027

- The budget is the maximum amount of pre-discount funding permitted for Wi-Fi hotspots and/or service over three funding years.
- ***Independent School or District Budget = [student count x (20 hotspots/100 students) x C1 discount rate] x \$630***
 - Calculate Wi-Fi hotspot and service budgets by **multiplying student count by 20%** (i.e., 20 hotspots per 100 students) **and multiply by the C1 discount rate. This number is rounded up to the nearest ten.** The applicant then **multiplies that rounded number by \$630** to determine the three-year pre-discount budget.
- ***Library or Library System Budget = [square feet x (5.5 hotspots/1000 sq ft) x C1 discount rate] x \$630***
 - Calculate Wi-Fi hotspots and service budgets **multiplying square footage, allowing 5.5 devices per 1,000 square feet, and multiply that by the C1 discount rate. This number is rounded up to the nearest ten.** The applicant then **multiplies that rounded number by \$630** to determine the three-year pre-discount budget.

Funding Caps: Devices & Internet Access Service Plans

- Maximum costs on the per unit cost of Wi-Fi hotspot devices and Internet access plans purchased through E-Rate.
- Pre-discount cost limitations (caps):
 - Recurring wireless Internet service: \$15/month
 - Wi-Fi hotspot: \$90/device
- **Taxes are not included in the capped amounts.**
- **Activation and configuration costs are included in the capped amounts.**
- All taxes and fees should be requested on separate funding request line items and separately identified on invoices.
- Applicants are permitted to select a Wi-Fi hotspot or service that costs more than the funding caps, but **E-Rate commitment amounts will not exceed the funding caps.**
- As with all other E-Rate services, billed rates must not exceed the actual contracted rates and USAC will only pay up to the committed contracted rate.



Reminder: FY24 Changes to the E-Rate Program

Specific updates to the E-Rate program beginning in FY24 include the following changes:

- For E-Rate eligible equipment/services **within a library**, implementing an **exemption to the competitive bidding requirements** for **all libraries** seeking E-Rate support for **Category Two (C2)** equipment/services that total a **pre-discount price of \$3,600 or less per library** per funding year (FY2024 and forward)
- School bus Wi-Fi services are eligible for buses that are school-owned, as well as leased or contracted school buses, provided that the school buses are used primarily to transport students to and from school and school-related activities for **educational purposes**. More information is available on the [Wi-Fi on Buses – Summary Overview](#) page.

Reminder: FY24 Recent Changes to the E-Rate Program

Changes to E-Rate for Tribal libraries include:

- Updated program definitions, defined Tribal entities, modified eligibility for Tribal college and university (TCU) libraries that serve the public, increased discount rate for C2 services, increased C2 budget floor (now \$55,000) (FY2024) (see FCC 23-56 issued on July 21, 2023)
- Extended the Tribal Library Pilot Program into FY2024: USAC will provide one-on-one support, group training sessions for participants, and E-Rate program trainings covering the program basics and processes (contact Gem Labarta at TribalLiaison@usac.org for more information)

Additional Potential Changes to the E-Rate Program

Eligible Services List Public Notice (DA 24-743):

- This year's ESL Public Notice is currently out for comment. Comments are due August 30 and reply comments are due September 16.

E-Rate Rulemaking:

- In July 2023, the Federal Communications Commission sought comment (FCC 23-56) on further E-Rate changes, including:
 - Changes to the ESL moving some services from BMIC to IC beginning in FY2025
 - Guidance on Transition of Services
 - A grace period for applicants/SPs to file the one-time 120-day invoicing extension or refile a denied/partially invoice after the invoice deadline

Program Compliance

Document Retention

- **Applicants and service providers** are required to retain documentation that demonstrates compliance with the statutory or regulatory requirements for all E-Rate program purchases of equipment and services **for a period of at least 10 years** after the latter of the last day of the applicable funding year or the service delivery deadline for the funding request.
- Winning **service providers** must retain records related to the purchase and delivery of E-Rate eligible equipment, signed and executed contracts, bidding information, invoices, provision of services, and other matters relating to equipment and services.
- For example, for **recurring internet access service** for FY2023, both the **applicant and the service provider** must retain all records until **at least June 30, 2034**.

Document Retention (cont.)

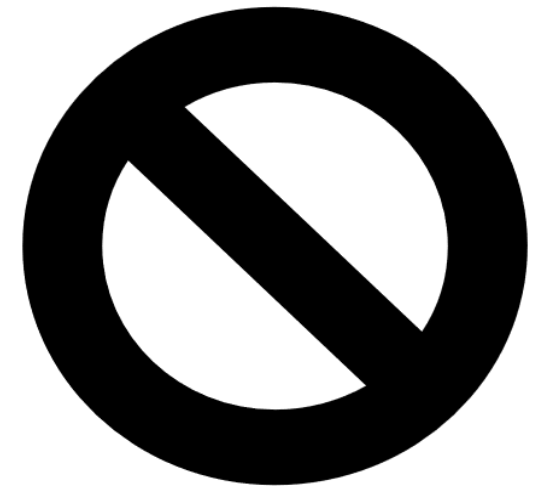
- Keep all records such as:
 - RFP documents
 - Winning and losing bids
 - Vendor correspondence
 - Evaluation matrices
 - Documentation and memos of zero or one bid received (if applicable)
 - Other competitive bidding documentation
 - Asset and Service Inventories
- Records can be kept electronically: Use file names and folder names that are specific and descriptive to help you locate them more easily.
- The [Document Retention List](#) is available in the Resources section of the USAC website.

Protecting the USF and E-Rate Program

As we focus on preventing fraud, waste, and abuse, **it is extremely important to: take document retention seriously, ensure compliance with program rules, and avoid the appearance of fraudulent activity.**

Beneficiaries must comply with program rules and provide USAC, as well as the FCC, with full and correct information, upon request.

- **E-Rate is a federal program established by the FCC under 47 C.F.R. Part 54**
- **Violations of E-Rate program rules, certifications, and/or the United States Code (U.S.C.) are subject to criminal prosecution and financial recovery.**



In our role as stewards of the E-Rate program, USAC must:

- Process and evaluate information received from program participants and universal service fund contributors.
- Conduct [audits](#) to ensure that funds are being used properly.
- Support investigations by law enforcement for E-Rate and USF.

Questions?



Eligible Services

AGENDA

- Eligible Services List
- Types of Eligible Service
- BMIC Details
- More on Eligible Services
- Advance Installation
- Basic Fiber Concepts

Eligible Services List

The Eligible Services List (ESL)

- Each year, before the opening of the **FCC Form 471 filing** window, the FCC releases a list containing general guidance on the equipment and services that are E-Rate eligible for the upcoming funding year.



Eligible Services List (ESL)

- The ESL also provides helpful information such as **eligibility conditions** for each category of service for the funding year.
- Applicants can only receive funding for eligible equipment and services that are being used **for educational purposes**.



Eligible Services List (ESL)

- The FCC Order containing the Funding Year 2025 Eligible Services List will be posted on E-Rate's Eligible Services List webpage when it is released.
- **The ESL Order has five sections, with the actual Eligible Service List posted last.**
 - Introduction – A preface to the contents of the Order.
 - Background – Discusses the FCC's seeking of comments, and related actions, prior to issuing the Order.
 - Discussion – Detailed discussion of scope of modifications in the Eligible Services List.
 - Appendix A– List of Commenters
 - Appendix B – FY2025 Eligible Service List.

What's New: Funding Years (FY) 2024 & 2025 Bus Wi-Fi and Wi-Fi Hotspots

School Buses: Eligibility of Mobile Broadband Connectivity

Beginning FY2024, mobile broadband connectivity for school buses is E-Rate eligible when used for educational purposes.

- The Wireless bullet on the FY2024 ESL was modified to clarify this new eligibility.
 - From FY2023: “Wireless (e.g. fixed wireless, microwave)”
 - To FY2024: “Wireless (e.g., fixed wireless; microwave; or **mobile service for use on school buses**)“
 - Please note that the FY2025 ESL Public Notice seeks comment on changing this language again to: “fixed wireless; microwave; mobile service for use on school buses; or mobile service for use with Wi-Fi hotspots”
- Installation fees and equipment needed to make this wireless service for school buses functional are also eligible under Category One.
- Separate maintenance and operations services related to mobile broadband connectivity for school buses are **not eligible**.

School Buses: Types Eligible for E-Rate Support

School bus Wi-Fi services are eligible for buses that are school-owned, as well as leased or contracted school buses, provided that the school buses are used primarily to transport students to and from school and school-related activities for educational purposes as defined by FCC rules.

- **Occasionally used chartered buses** (e.g., used for school field trips), municipal, or city buses are **ineligible**.
- Other types of school-owned vehicles (e.g., cars and vans) are also **ineligible**.

More information is available on the [Wi-Fi on Buses – Summary Overview](#) page.

School Buses: Restrictions on Usage

- Equipment and services must primarily be utilized for **educational purposes** as defined by E-Rate rules.
- There are no new user or Children's and Internet Protection Access (CIPA) restrictions adopted for Bus Wi-Fi. All restrictions must be consistent with those placed on building-based broadband networks.
- Wi-Fi should **only be active during school bus normal operating hours** (i.e., when students are being transported to and from school or school-related activities) or when there is a **clear educational purpose** for enabling school bus Wi-Fi connections outside of these hours. Bus Wi-Fi service must be disabled outside of these hours and cannot be utilized for community purposes.
- Security cameras for buses are ineligible for E-Rate support.

School Buses: Multiple Service Providers

Clarification of prohibition on redundant or duplicative services for school bus wireless services.

- Schools may **situationally enter into agreements with multiple providers** such as when some buses are served by one provider and other buses by a different provider.
- Rural applicants may select a solution that allows a bus to be served by multiple providers. Schools and school districts can check their urban/rural status [here](#).

School Buses: Competitive Bidding

- School bus Wi-Fi is subject to all existing E-Rate rules and requirements, including those related to competitive bidding, cost allocation, and discounting rules.
- Applicants who entered into multi-year agreements for Bus Wi-Fi in the Emergency Connectivity Fund (ECF) program are **not exempt** from competitive bidding requirements.
- The competitive bidding exemption for Commercially Available Business Class Internet Option (CABIO) services **does not apply to bus services**. It only applies to services delivered to a school or library building.
- Service provider selection must be consistent with E-Rate program rules including selecting the most cost-effective service offering(s), using **price of the eligible equipment and services as the primary factor** in the evaluation matrix.

Wi-Fi Hotspots: E-Rate Eligible

- **Wi-Fi hotspot:** a device that is intended to **provide Wi-Fi connectivity to a hotspot user as its sole function.**
- Wi-Fi hotspots will be **eligible as Category One (C1) network equipment** necessary to make C1 wireless Internet services functional.
- Wi-Fi hotspot funding requests limited to fixed, **three-year budget cycle.** First cycle funding years (FY) 2025 – FY 2027.
- Off-premises **Wi-Fi hotspots equipment** and **mobile wireless Internet services** requests will be prioritized *after* on-premises Category 1 and 2 equipment and service requests, in the event demand exceeds available funding.

Eligible Equipment and Services

- **To be E-Rate eligible**, Wi-Fi hotspots **must**:
 - Be portable.
 - Be a single device (i.e., not a set of linked devices).
 - Be for use with a commercially available mobile wireless Internet service.
- **What is NOT eligible** for E-Rate funding:
 - Multi-functional devices (e.g., smartphones, PCs, notebooks, tablets, customer premises. equipment, routers or switches, and wireless access points, etc.).
 - Wireless services delivered to any broadband-enabled end user devices (e.g., laptops, tablets), fixed wireless connections and the related equipment, private 5G/LTE networks, fiber, and network expansion or construction.
- In addition, 1:1 Wi-Fi hotspot initiatives are not allowed, and each Wi-Fi hotspot must have an associated line of service to be eligible for E-Rate funding. Wi-Fi hotspots may not be warehoused/stored for future use or as replacements for lost, damaged, or stolen Wi-Fi hotspot devices.



Types of Eligible Service

Categories of Service

- Category 1 Services are services needed to support broadband connectivity **to eligible schools and/or libraries**
- Category 2 Services are
 - Services needed for broadband connectivity **within schools and/or libraries**, and
 - Services needed to bring broadband **into** and provide it **throughout** schools and libraries.

Equipment and services may be fully or only partially eligible for E-Rate Support.

Categories of Services

- **Category One (C1)**

- Data Transmission and/or Internet Access
- Bus Wi-Fi
- Off-premises Wi-Fi hotspots
- Wi-Fi Hot spots is the only C1 equipment and/or service with a budget
- Visit the [Eligible Services List](#) on our website

- **Category Two (C2)**

- Internal Connections, Managed Internal Broadband Services, and Basic Maintenance of Internal Connections
- Applicant has a budget or limit on how much funding can be requested
- Budget covers a five-year period (FY2021-2025)
- See [Category Two Budgets](#) page

Category One Services – Service to the Entity - Examples

- Leased lit fiber or leased dark fiber
- Internet access
- Satellite service
- DS-1 (T-1), DS-3 (T-3), etc.
- DSL
- Broadband over power lines
- Equipment and services supporting mobile broadband to eligible school buses

Category One Services – Service to the Entity – Eligible Costs

- Eligible costs associated with Category One services:
 - Monthly charges
 - Special Construction
 - Installation and Activation charges
 - Software
 - Modulating electronics/equipment necessary to make an eligible Category One broadband service functional
 - Maintenance and operations charges, including costs of for software needed for the operation of or maintenance of Network Equipment
 - The FY 2024 Eligible Services List clarified that the software necessary to operate or maintain Category One equipment is eligible.

Types of Category Two Service

- **Internal Connections (IC)** - The equipment and services used to bring broadband into, and provide it throughout, schools and libraries.
- **Basic Maintenance of Internal Connections (BMIC)** – Basic maintenance and technical support appropriate to maintain reliable operation for eligible broadband **internal connections**.
- **Managed Internal Broadband Services (MIBS)** – Third-party operation, management, and monitoring of eligible broadband internal connections (owned or leased equipment).

Category 2 services have a five-year budget, based on student count (schools) or square footage (libraries).

The type of Category 2 service you select must be consistent between your FCC Form 470 and FCC Form 471.

Category Two Service Type Examples

- **Internal Connections**

- Cabling, routers, switches, and modems
- Right-to-use software or Client Access Licenses

- **Basic Maintenance of Internal Connections (BMIC)**

- The **repair and upkeep** of eligible cabling, routers, switches and modems
- Multi-year maintenance service subscriptions

Note: Only maintenance services **provided in the applicable funding year** are eligible in that year (i.e., 1 year of a 3-year subscription should be requested on a current year funding request and invoiced a year at a time over the 3-year period).

- **Managed Internal Broadband Services (MIBS)**

- Managed Wi-Fi agreement

Basic Maintenance of Internal Connections (BMIC) Detail

Basic Maintenance of Internal Connections Types

- Basic Maintenance of Internal Connections is the **repair and upkeep of eligible internal connections**.
- The two types of Basic Maintenance Internal Connections are:
 - **In-Person Services**, which include on-site repairs (Time and Material Contracts)
 - **Remote Services**, which include Maintenance Support Services (such as, basic technical support, configuration changes, bug fixes, patches, software upgrades, support service subscription licenses, technical support licenses)
- The equipment being maintained must be eligible in order for the maintenance to be eligible for E-Rate support.
 - If repair or replacement work is performed under a maintenance contract, USAC only reimburses for the **actual work performed**.
- The [Eligible Services List](#) issued by the FCC defines eligible BMIC services each year.

Examples of Basic Maintenance of Internal Connections

- Repair and upkeep of eligible hardware (**In-Person Services** / Time and Materials)
- Wire and cable maintenance (**In-Person Services** / Time and Materials)
- Configuration changes (**Remote Services**/ Maintenance Support Services)
- Basic technical support including online and telephone-based technical support (**Remote Services** / Maintenance Support Services)
- Software upgrades and patches including bug fixes and security patches (**Remote Services** / Maintenance Support Services)

Any license that provides **maintenance functionality** should be requested under **BMIC** on the FCC Form 470/471 (not client access or right to use licenses).

Basic Maintenance of Internal Connections Services Do Not Include

- **Actual Equipment** being maintained (e.g., cabling, access points, switches)
 - These are eligible under **Internal Connections**.
- Unbundled warranties (Not Eligible for E-Rate Funding)
- Network management services, including 24-hour network monitoring (Eligible under **Managed Internal Broadband Services, MIBS**)
- The management, operation, and monitoring of eligible broadband internal connections (Eligible under **Managed Internal Broadband Services, MIBS**)
- Maintenance on ineligible equipment (**Not Eligible** for E-Rate Funding)
- Internal connections software (**including Right to Use** and **Client Access Licenses to make equipment functional**): Internal connections software allows the equipment to function and distribute high-speed broadband. They do not provide support or maintenance and are therefore ineligible as BMIC. Such software is eligible as **Internal Connections**.

Mixed Functionality

Some equipment has **mixed** BMIC & Internal Connections (IC) functionality

- Some vendor licenses may include both **BMIC** & **IC** functionality such as **Right-to-Use** (RTU) and **Maintenance Services on the same license**.
- Split the license based on functionality (i.e., RTU and maintenance) into separate FRNs for BMIC and IC
 - Contact the manufacturer or USAC's Customer Service Center (CSC) to obtain the breakdown for specific functionality that is included in a specific mixed services license

Tip: During your competitive bidding process, if you are seeking bids for Right-To-Use functionality and maintenance subscription services, be sure to post for all applicable service types on the FCC Form 470. (**i.e., IC and BMIC**)

Mixed Functionality - Example

Some licenses or service subscriptions may have **mixed** BMIC & Internal Connections (IC) functionality

- Question to ask: Is the “Prepaid Multiyear” license or subscription:
 - A Right-to-Use license and therefore an internal connections item and/or
 - Software upgrades and patches including bug fixes and security patches and therefore the SKU is basic maintenance of internal connections?

Tip: If it contains features of **both** types, you should work with the vendor to determine if a separate identifiable price exists for the different aspects.

If an Item is Misclassified on your FCC Form 471

After you receive your Funding Commitment Decision Letter, you may realize that a prepaid SKU (for example) was incorrectly classified as **Internal Connections** and should be classified as **BMIC**. The actions you take to remediate depend on the details.

- If you realize the error before the 60-day appeal period
- If you realize the error after the 60-day appeal period
- If the FCC Form 470 does not contain the category the item should be listed under, it must be re-filed.

Changing Service Types After Submitting FCC Form 471

All services must be properly bid during the FCC Form 470 process.

- Be sure to confirm that you are posting for all service categories for which you are requesting bid responses on the FCC Form 470.
- FCC Forms 470 with the correct service type are required for corrections to be made on the FCC Form 471.
- To request changes identified **after** the FCC Form 471 is certified and **before the FCDL is issued**:
 - Submit a Receipt Acknowledgement Letter (RAL) modification request
- To request changes identified **after the FCDL is issued**:
 - Submit a Service Substitution request with a detailed narrative
 - Background information
 - Calculation for changes (single vs. multi-year)
 - Reason for the correction

Time and Materials / On-Site Maintenance Example

- In-person repair of eligible internal connections equipment
- Billed at an hourly rate
 - Example: A cable is cut or frayed, and the service provider sends on-site maintenance to repair the cable.
- Applicant is billed for both the time and necessary materials to complete the repair.
- When invoicing E-Rate for time and Materials Basic Maintenance and Internal Connections, please provide the hours worked, the hourly rate, and the equipment being maintained.

Maintenance Support Service (Single Year) Example

- Includes eligible BMIC services such as:
 - Ongoing operating system software updates and upgrades.
- May also includes an ineligible service:
 - Advanced security features like Intrusion Protection Systems or Deep Packet Inspection.
 - Advanced or next-generation firewall or other network security services.
- Check to see what services are eligible and ineligible in the [E-Rate Eligible Service List](#).

Maintenance Support Service (Cont.)

- Partially eligible BMIC support
 - Includes eligible and ineligible services
 - Therefore, this subscription is **partially** eligible for BMIC support
- Your service provider can provide more information regarding eligibility and functionality of equipment and services.
- Contact us if you need assistance.

Multi-Year Maintenance Support Services

These are preventive and remedial services that physically repair or optimize hardware, including maintenance under contract and per-incident repair

- **Services are only eligible for one funding year at a time.**
- You must apply for funding for each year separately.
 - Example: A 3-year maintenance contact for \$12,000 can be submitted for reimbursement for each funding year associated for a maximum of \$4,000 per funding year.
 - Prorate the cost of the service for one year and only invoice after the services are received **for the applicable funding year.**
 - If services extend outside the funding year window, the invoice will be modified to only pay the current funding year services.
 - Inform the reviewer which year of the **multi-year** contract you are invoicing for.
 - Example: 3-year maintenance contract for **FY2023 – 2025**. When submitting your request for your 2nd year, indicate that fact to the reviewer.

Multi-Year Maintenance Services Example

- An applicant has received a **3-year maintenance support subscription**, (a 24-hour, 365 days a year service) to get the latest upgrades and updates.
- During the submission of each year's FCC Form 471 request, the applicant should:
 - Cost allocate the services by the term of the subscription and **only request funding and invoice for 1 year** of the services.
 - Submit a new FRN for one year of service.
- Since the applicant has already been billed by the service provider for the 3 years upfront, when invoicing USAC, the applicant/service provider would reference the same service provider bill from year one.
- The applicant/service provider should also explain to the reviewer why the date on the service provider bill is outside of the funding year.

More on Eligible Services

Budgeting by Category

- **Category One (C1)** services are not limited in cost as long as they are cost-effective (except as noted below).
 - The recently-adopted Wi-Fi Hotspot Order adopts a budget and funding caps for Wi-Fi hotspots and services.
- **Category Two (C2)** services are limited by a pre-discount cost ceiling (the “Category Two budget”)
 - Budget period is five years
 - Budget is calculated based on:
 - Schools: Number of full-time students in the school
 - Libraries: Square footage of the library branch

Recurring Services

- Services that are billed **monthly** – (e.g., broadband internet access service.)
- Must be received during the relevant funding year to be eligible for E-Rate funding.
 - For FY2025, this means that recurring services must be **received** between **July 1, 2025 and June 30, 2026**.

Non-Recurring Services

- **One-time charges** for equipment and services that are delivered and installed (e.g., wiring, other cabling or wireless installations and equipment).
- Applicants and service providers have until September 30 following the close of the funding year to deliver and install non-recurring C2 services.
- For **FY2025**, this means **non-recurring C2** services can be delivered from **July 1, 2025 through September 30, 2026**.
- This service delivery deadline can be extended under certain circumstances.

Advance Installation

What is Advance Installation?

- Some **Category One** non-recurring equipment can be installed as early as January 1, prior to the July 1 start of the funding year, if certain conditions are met. See [Advance Installation](#) for more information.
- **Category Two** non-recurring services can be installed beginning April 1 before the start of the funding year.



Advance Installation – Category One

Advanced installation for non-recurring **Category One** equipment and services can occur provided the following conditions are met:

- The construction begins after selection of the service provider;
- The service provider must be selected pursuant to an FCC Form 470 posting;
- A Category One recurring service must depend on the installation of the infrastructure;
- The Category One recurring service's actual start date is on or after July 1 of the funding year.

Advance Installation – Category Two

- Advanced installation of non-recurring **Category Two** equipment and services:
 - Services cannot start until after the **28-day competitive bidding process** is completed and the service provider is selected.
 - Funding is not guaranteed until USAC issues a Funding Commitment Decision Letter.

Advance Installation Reminders

- Funding is not guaranteed until USAC issues a Funding Commitment Decision Letter (FCDL).
- Invoices FCC Form 472 or FCC Form 474 cannot be dated before July 1 of the funding year.

Basic Fiber Concepts

Introduction to Fiber - Types of Eligible Fiber

1. Leased lit fiber

The applicant pays a monthly fee to the service provider who provides the fiber, the connections, the network equipment, and the data transport and/or internet access service. The service provider also manages and maintains the network.

2. Leased dark fiber

The applicant leases a portion of a fiber network owned by a service provider and pays separately for the network equipment, maintenance and operations, and data transport and/or internet access service over that fiber.

Introduction to Fiber - Types of Eligible Fiber

3. Self-provisioned network

Applicant ownership of a high-speed broadband network. The applicant hires a vendor to construct the network or a portion of the network, and thereafter completely or partially owns and maintains that network or portion. An E-Rate eligible entity may share the services and equipment used to construct and/or operate a self-provisioned network supported by E-Rate funding with an ineligible third-party entity so long as the ineligible third-party entity pays its fair share of the costs, i.e., its pro-rata portion of the undiscounted costs of the network.

Note: Although included as a fiber option, a self-provisioned network may utilize technologies other than fiber. The applicant owns the network that it hires a service provider to construct. The applicant must pay for the network equipment, pay to maintain the network, and pay for any data transport and/or internet access services separately.

Introduction to Fiber - Types of Eligible Fiber cont.

3. Self-provisioned network cont.

- Self-provisioned networks are a technology-neutral eligible service. Applicants may self-provision a fiber network, but applicants may also self-provision networks using other technologies (i.e., fixed microwave) or a mix of fiber and other technologies. In light of this, the FCC adopted a technology-neutral competitive bidding standard for self-provisioned networks – service provided over third-party networks.
- If an applicant specifies a requested bandwidth that other providers can supply, the technology-neutral competitive bidding standard expands the competitive bidding pool and helps to ensure that applicants requesting E-Rate support for self-provisioned networks only do so when it is the most cost-effective service option to meet their connectivity needs. It is possible that based on the applicant's bandwidth specifications that fiber may be the only option for receiving the requested bandwidth.

Fiber – What is Network Equipment?

- A single piece of Network Equipment (also called basic terminating equipment) is eligible under **Category One**.
 - The single piece must be located at the demarcation – the point at which the service provider would start to check if service were interrupted.
- Other pieces of Network Equipment can be eligible as **Category Two Internal Connections**.

Fiber – What is Network Equipment?

- Network Equipment includes the electronics and equipment necessary to make a Category One fiber service functional.



Resources

- [Eligible Services Overview Webpage](#)
- [Eligible Services List](#)
- [Eligible Services List \(ESL\) Glossary](#)
- [Fiber – Summary Overview](#)
- [Fiber Frequently Asked Questions](#)

Questions?



Improving E-Rate

Listening Session: Improving E-Rate

- We want to hear from you!
 - What's working?
 - As E-Rate administrators, what can we do to help you?
 - What questions do you have?





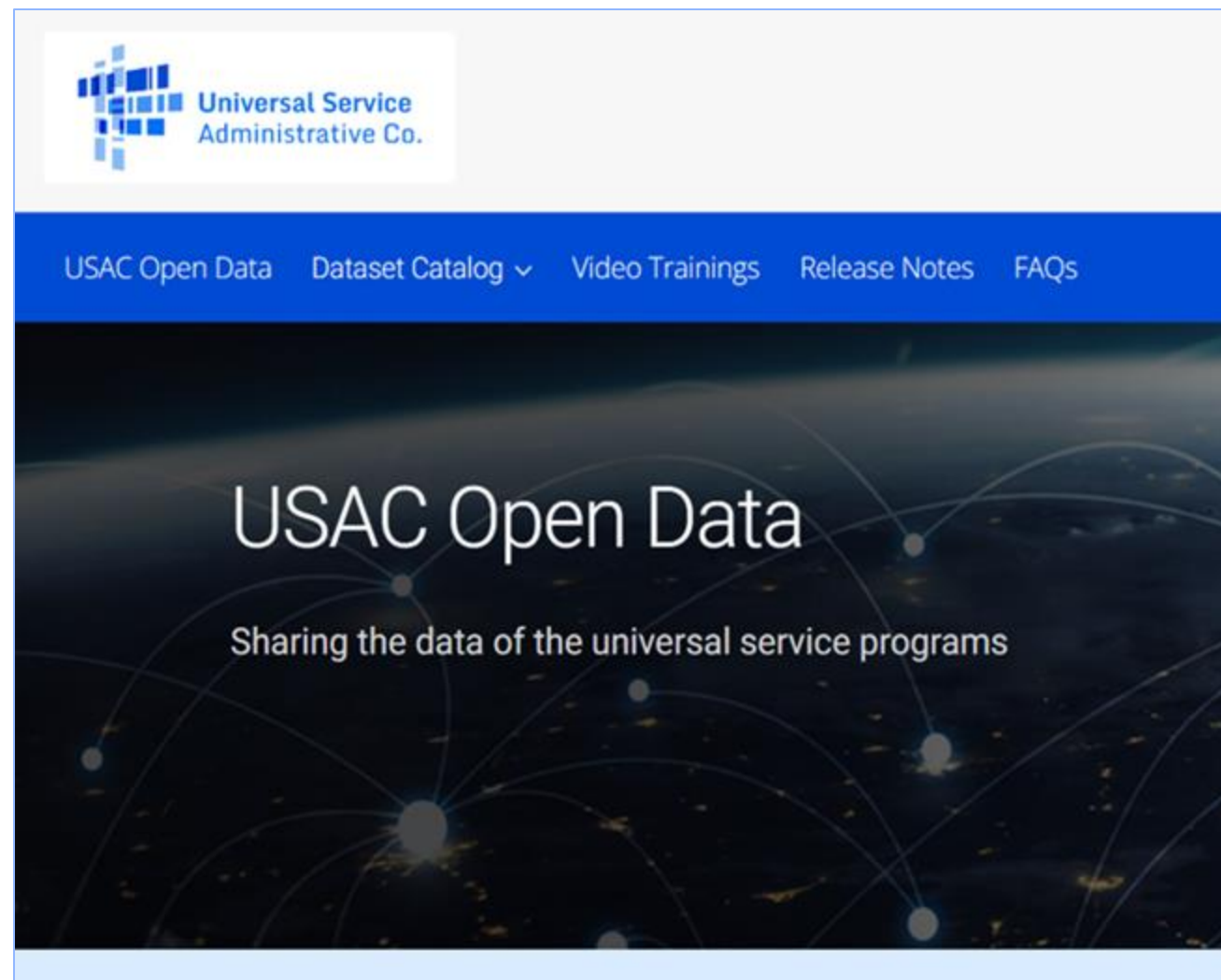
Open Data Overview

Agenda

- Open Data Introduction
- Learn to Navigate to the Open Data Platform
- Explain the Various Open Data Sets and Tools Available
- Review Additional Open Data Resources

What is Open Data?

- USAC's Open Data is a web portal where you can access:
 - Raw data submitted by Universal Service Program participants
 - Self-service tools connected to USAC data
- As part of USAC's Open Data initiative, we make this data open and accessible to the public.
 - Anyone is free to use, re-use, and redistribute the data in our datasets.



What Is It For?

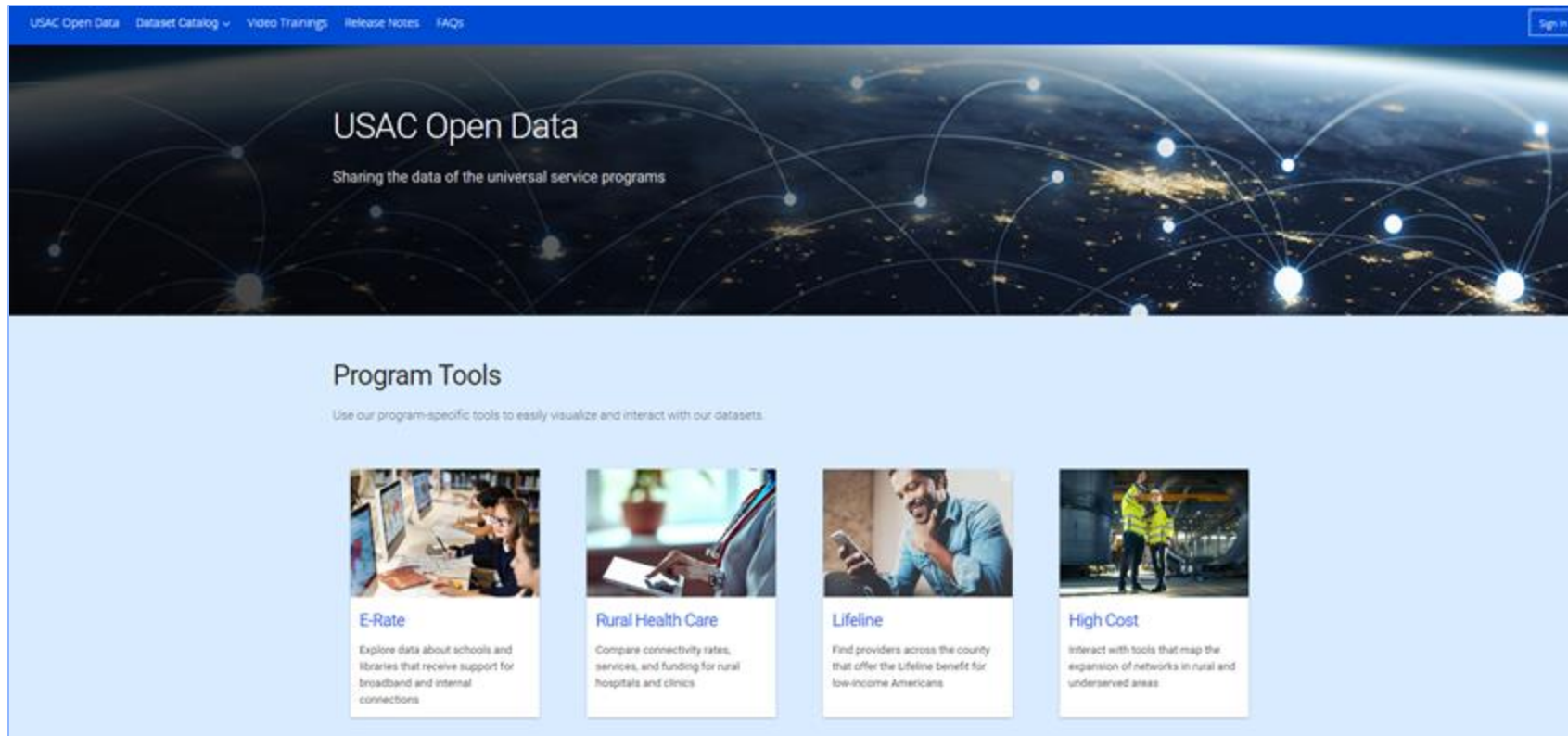
- Make Universal Service Fund program data available to the public in an equitable and reliable way.
- Provide transparency, visibility, and self-service in a highly secure platform.
- Help stakeholders answer Universal Service Fund program questions using the available data.

How Does Open Data Accomplish This for E-Rate?

- Provides E-Rate data related to:
 - FCC Form 470 (Competitive Bidding)
 - FCC Form 471 (Request for discount on services and funding commitments)
 - FCC Forms 472/474 (Reimbursements)
 - Category 2 FY2021+ budgets
 - E-Rate Productivity Center (EPC) related data
- Allows searching large datasets of aggregated E-Rate information using a variety of filters
- Allows creating customized reports and visualizations
- Provides data export options in multiple formats, including Excel

How to Access Open Data

Access USAC Open Data Website: <https://opendata.usac.org/>



The screenshot shows the homepage of the USAC Open Data website. At the top, there is a navigation bar with links for "USAC Open Data", "Dataset Catalog", "Video Trainings", "Release Notes", and "FAQs", along with a "Sign In" button. The main header features the text "USAC Open Data" and "Sharing the data of the universal service programs" over a background image of a globe with network connections. Below this is a "Program Tools" section with the subtitle "Use our program-specific tools to easily visualize and interact with our datasets." This section contains four tool cards: "E-Rate" (exploring data about schools and libraries), "Rural Health Care" (comparing connectivity rates, services, and funding for rural hospitals and clinics), "Lifeline" (finding providers across the country that offer the Lifeline benefit for low-income Americans), and "High Cost" (interacting with tools that map the expansion of networks in rural and underserved areas).

Datasets and Tools

Open Data Datasets vs. Tools: How do they differ?

Datasets:

- are always tabular
- include all columns and do not have any pre-set filters
- can be used to build tools or views

Datasets

Go directly to our datasets to access all of the new data submitted by universal service program participants.

As part of USAC's Open Data Initiative, we make this data open and accessible to the general public. Anyone can view, download, and redistribute the data.

E-Rate Data
100,000+ schools and libraries connected

Rural Health Care Data
9,000+ clinics supported

16 Results filtered by Categories > E-rate > View Types > Datasets > Clear All Sort by Alphabetical

E-Rate C2 Budget Tool Data FY2021+ Dataset
The C2 Budget Tool Data FY2021+ Set is designed to assist applicants in determining their C2 budgets for each five-year cycle beginning with the first budget cycle, which starts in FY2021 and ends in FY2025. The data set and tool should be More
Updated February 7, 2023 Views 24,231
Tags: broadband, c2, c2 budget tool, e-rate, and 9 more API Docs

E-Rate Invoices and Authorized Disbursements (FCC Forms 472 and 474) Dataset
The E-Rate Invoices and Authorized Disbursements (FCC Forms 472 and 474) dataset provides invoicing data for applicants, service providers, and other stakeholders so they can track invoice lines completed and authorized for More
Updated February 7, 2023 Views 1,768
Tags: 471, 472, 474, applicant, applicant contact information, and 21 more API Docs

E-Rate Open Competitive Bidding: Basic Information (FCC Form 470 and Related Information) Dataset

Tools:

- can be a mixture of tables and charts
- may include only select columns and/or pre-set filters
- designed for a specific purpose to be more convenient for users

Program Tools

Use our program-specific tools to easily visualize and interact with our datasets.

These tools provide access to public E-Rate Program data including commitments and disbursements. For the full catalog of datasets, see [E-Rate Datasets](#), which includes data from [FCC Form 470](#), [FCC Form 471](#), and information about [entities](#), [consultants](#), and [invoices](#).

Featured Tools

E-Rate FRN Status Tool FY2016+

The E-rate FRN Status Tool FY2016+ provides the latest funding request number (FRN) data including: applicant, BEN data; service provider data; FRN status; service type; service start and end dates; FRN costs and funding amounts; FCC Form 473 - Service Provider Annual Certification (SPAC) status; applicant FCC Form 498 status, application pending reasons; FCC Form 486 status; wave date; Funding Commitment Decision Letter (FCDL) comments; last post commitment/appeal wave data; service delivery and invoice deadlines; invoicing mode; and total disbursement amount. Each row in the data set is for a single FRN.

Watch the [video walkthrough](#) to learn how to use the tool.

E-Rate FRN Invoice Deadline Tool

The E-Rate FRN Invoice Deadline Tool provides users with the ability to search, view, and download funding request number (FRN) data related to invoicing including the invoice deadline date, funds remaining for invoice

Instructions
Use the filters on the right to select your data. You must select Apply to edit.

Year	FRN	\$10	\$15	\$20
2018	0001	0	0	0
2018	0002	0	0	0
2018	0003	0	0	0
2018	0004	0	0	0
2018	0005	0	0	0
2018	0006	0	0	0
2018	0007	0	0	0
2018	0008	0	0	0
2018	0009	0	0	0
2018	0010	0	0	0
2018	0011	0	0	0
2018	0012	0	0	0
2018	0013	0	0	0
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2018	0015	0	0	0
2018	0016	0	0	0
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2018	0038	0	0	0
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2018	0041	0	0	0
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2018	0043	0	0	0
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2018	0073	0	0	0
2018	0074	0	0	0
2018	0075	0	0	0
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2018	0077	0	0	0
2018	0078	0	0	0
2018	0079	0	0	0
2018	0080	0	0	0
2018	0081	0	0	0
2018	0082	0	0	0
2018	0083	0	0	0
2018	0084	0	0	0
2018	0085	0	0	0
2018	0086	0	0	0
2018	0087	0	0	0
2018	0088	0	0	0
2018	0089	0	0	0
2018	0090	0	0	0
2018	0091	0	0	0
2018	0092	0	0	0
2018	0093	0	0	0
2018	0094	0	0	0
2018	0095	0	0	0
2018	0096	0	0	0
2018	0097	0	0	0
2018	0098	0	0	0
2018	0099	0	0	0
2018	0100	0	0	0

Click and drag to pan the chart.

Instructions
Use the filter dropdown tabs on the right to specify the data to display. Click to...

Filtering: Commitment Request, Disbursement Amount

Key E-Rate Open Data tools

Datasets	Tools
E-Rate Supplemental Entity Information	<ul style="list-style-type: none"> • E-Rate Entity Search Tool
E-Rate FCC Form 470 Tool Data	<ul style="list-style-type: none"> • E-Rate FCC Form 470 Download Tool
E-Rate Request for Discount on Services: FRN Status (FCC Form 471 and Related Information)	<ul style="list-style-type: none"> • E-Rate FRN Status Tool FY2016+ • E-Rate FRN Invoice Deadline Tool
E-Rate Request for Discount on Services (all datasets)	<ul style="list-style-type: none"> • E-Rate FCC Form 471 Download Tool
E-Rate Invoices and Authorized Disbursements (FCC Forms 472 and 474)	<ul style="list-style-type: none"> • E-Rate Invoice Disbursements Data Lookup Tool
E-Rate C2 Budget Tool Data FY2021+	<ul style="list-style-type: none"> • E-Rate C2 Budget Tool FY2021+

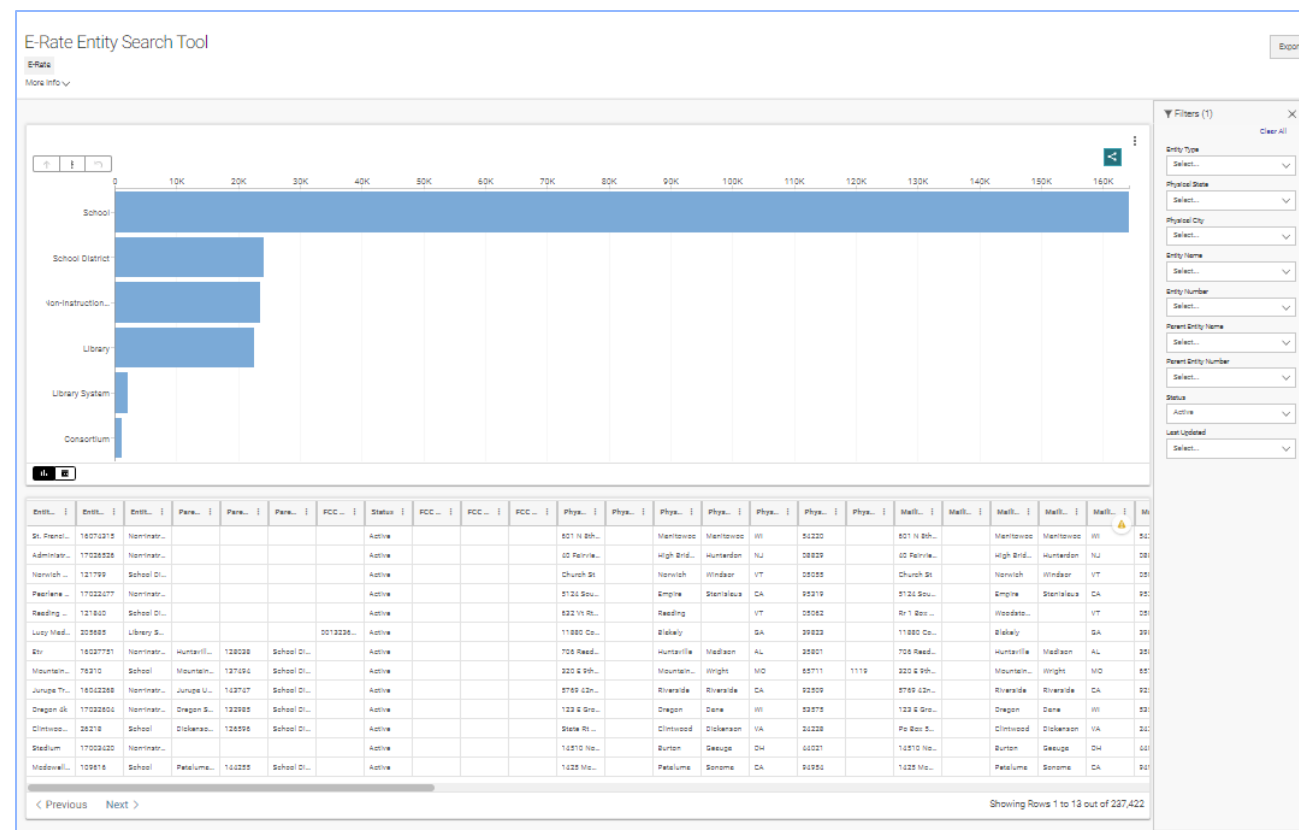
E-Rate Entity Search Tool

Provides E-Rate Productivity Center (EPC) information about schools, libraries, school districts, library systems, consortia, and non-instructional facilities (NIFs) including:

- Entity name, number, type, and parent entity
- Physical and mailing location

Can answer questions such as:

- How can I see if my school is signed up for the E-Rate program?



E-Rate FCC Form 470 Download Tool

Provides **service providers** information on applicant's requested services details from submitted FCC Forms 470 including:

- Contact information
- Application number
- Billed Entity Number (BEN)
- Service type and Function
- Links to FCC Form 470 documents and related Request for Proposal (RFP) attachments
- Other related information from the E-Rate Productivity Center (EPC).

Can answer questions such as:

- How can I as a service provider search for what services are being requested for Funding Year 2025?

E-Rate FCC Form 470 Download Tool

E-Rate FCC Form 470 Data

The *E-Rate FCC Form 470 Download Tool* can be used to:

- View and export FCC Form 470 data found in the E-Rate Productivity Center (EPC) for Funding Year 2016 and onwards. This data includes applicant and requested services details such as contact information, application number, Billed Entity Number (BEN), funding year, service type, function, links to FCC Form 470 documents and related Request for Proposal (RFP) attachments; and other related information from the E-Rate Productivity Center (EPC).
- Download PDF versions of the FCC Form 470 (the latest form version either original or current) as well as any Request for Proposal (RFP) attachments.

Below is some additional information about this tool:

- Data in the tool is updated nightly.
- The "Original" form versions are those first filed by the applicant; "Current" form versions are those that have been modified. The data includes whichever is the latest form version for each application.

How to search for FCC Form 470 data:

1. Click on "More ▼" on the bottom right of the *Filters* section below to display all filters.
2. Use any of the filters to search for the FCC Form 470 data that you need. For text filters, you can also search by using "CONTAINS" instead of the default "IS".
3. The data will be displayed in the data table section below the *Filters* section.
4. To view descriptions of the available columns in the data, you can click on the "i" icon on the top right of the data table section below and then click on "View Source Data"; the descriptions will be in the "Columns in this Dataset" section of the page.

Note to Service Providers offering Lit Fiber service: When offering bids for Lit Fiber services, Service Providers can respond to FCC Forms 470 applications that have as 'Function' either of the following: 'Internet Access and Data Transmission Service', 'Standalone Data Transmission Service', 'Services Provided Over Third-Party Networks' or 'Leased Lit Fiber'. This allows vendors offering equivalent services via other technologies to also submit bids.

Filters More ▼

Clear All

Funding Year	Certified Date/Time	Billed Entity State	Billed Entity Zip Code	Service Category	Service Type
Select...	Select...	Select...	Select...	Select...	Select...

Detailed FCC Form 470 Data Report

Application Number	Form Nickname	Form PDF	Service Request ID	Service Reque...	Request for Proposal Documents	Request for Proposal Upload Date/Time	Form Version	F
240026033	CU25-47001-C1-	http://publicdata...	1	0			Original	2
240026059	2025.470 Shawn	http://publicdata...	2	2	http://publicdata.usac.org/31/Ph	2024 Jul 20 11:07:09 AM	Current	2
240026059	2025.470 Shawn	http://publicdata...	2	2	http://publicdata.usac.org/31/Ph	2024 Jul 20 11:07:03 AM	Current	2
240026059	2025.470 Shawn	http://publicdata...	1	2	http://publicdata.usac.org/31/Ph	2024 Jul 20 11:07:09 AM	Current	2
240026059	2025.470 Shawn	http://publicdata...	1	2	http://publicdata.usac.org/31/Ph	2024 Jul 20 11:07:03 AM	Current	2
240026059	2025.470 Shawn	http://publicdata...	5	2	http://publicdata.usac.org/31/Ph	2024 Jul 20 11:07:09 AM	Current	2

1 to 6 of 1,288,800

How to Export FCC Form 470 data:

1. Click on the "i" icon on the top right of the data table section above and click "Export Data".
2. Once the download menu is displayed, select "Filtered Data (n rows)" to only download your filtered data rather than the complete dataset.
3. Click on the "CSV" or "CSV for Excel" button to initiate the download.
4. Once the download is complete, it will be available in your browser's downloaded files.

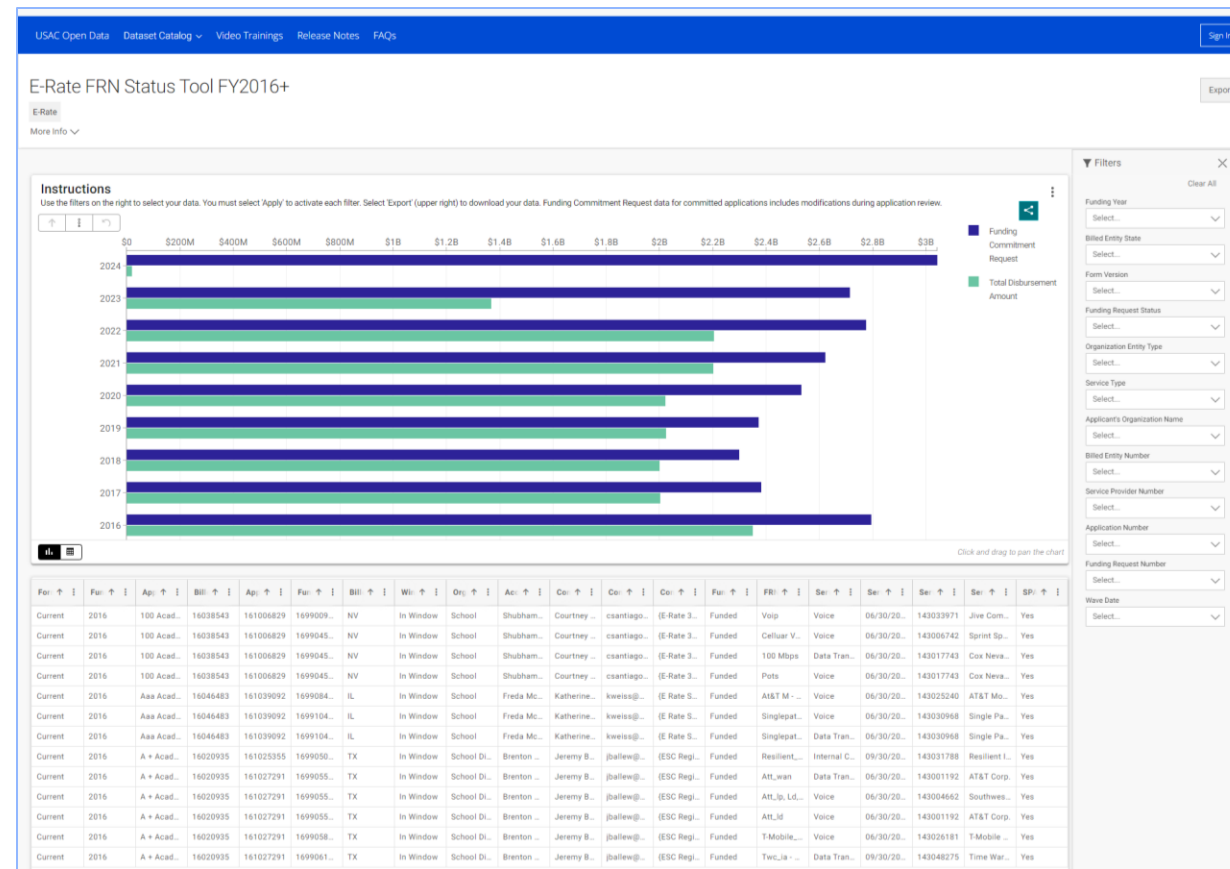
E-Rate FRN Status Tool 2016+

Provides funding request data including:

- Funding status
- Funding wave data
- Disbursements
- Service Provider Annual Certification (SPAC) Status
- Funding Commitment Decision Letter (FCDL)

Can answer questions such as:

- How can a user check on the status of their FRNs for their school district?
- How can a user check to see how much from their funding requests has been disbursed for a given funding year?



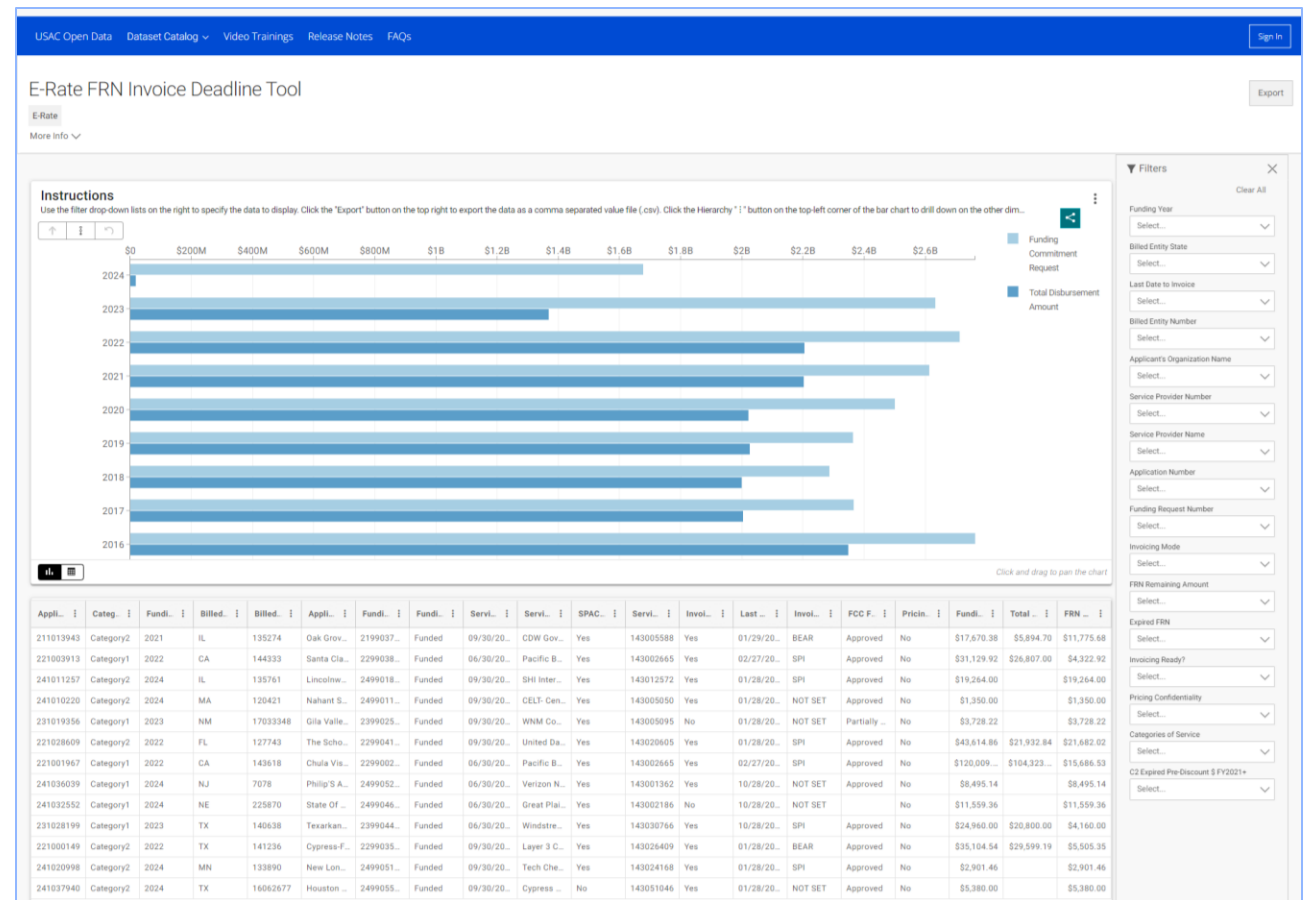
E-Rate Invoice Deadline Tool

Provides the ability to search, view, and download invoice related data including:

- Invoice deadline dates
- Funds remaining for invoicing
- Invoicing mode: Billed Entity Applicant Reimbursement (BEAR) vs. Service Provider Invoice (SPI).

Can answer questions such as:

- How can I check to see the last day to invoice for a funding request and decide if I want to file a 120-day invoice deadline extension?
- How much funding do I have remaining in my funding request and is it ready for invoicing based on the FCC Form 473 and FCC Form 486 statuses?
- Do I have expired Category Two funds available to return to my Category Two budget via FCC Form 500?



E-Rate FCC Form 471 Download Tool

Provides the ability to view and download data from all seven FCC Form 471 datasets for FY2016 and forward from a single screen, including:

- FCC Form 471 basic information
- Funding request details including program deadlines
- Related consulting firm details
- Discount calculation data
- Line item data
- Recipient of service data

Can answer questions such as:

- How can I obtain a PDF copy for the FCC Form 471 for applicants based in a specific state for Funding Year 2024?
- How can I obtain a list of my funding requests?
- Which funding requests are pending funding approval for services for a given school district for Funding Year 2024?

The screenshot displays the 'E-Rate FCC Form 471 Download Tool' interface. It features a sidebar with navigation options: 'Filter, Download', 'View Data', and 'Download Data'. The main content area is titled 'FRN Status' and includes a description: 'This dataset contains information about the Funding Request Number (FRN) listed within each FCC Form 471 and related information from the E-Rate Productivity Center (EPC)'. Below the description is a table with columns for Application ID, Funding Year, Billed Encl., Form Ver., Window, Billed Encl., Applicant, Contact, Funding, FRN Nic., Service, and Contract. The table contains six rows of data. At the bottom right, it shows '1 to 6 of 1,318,156' records.

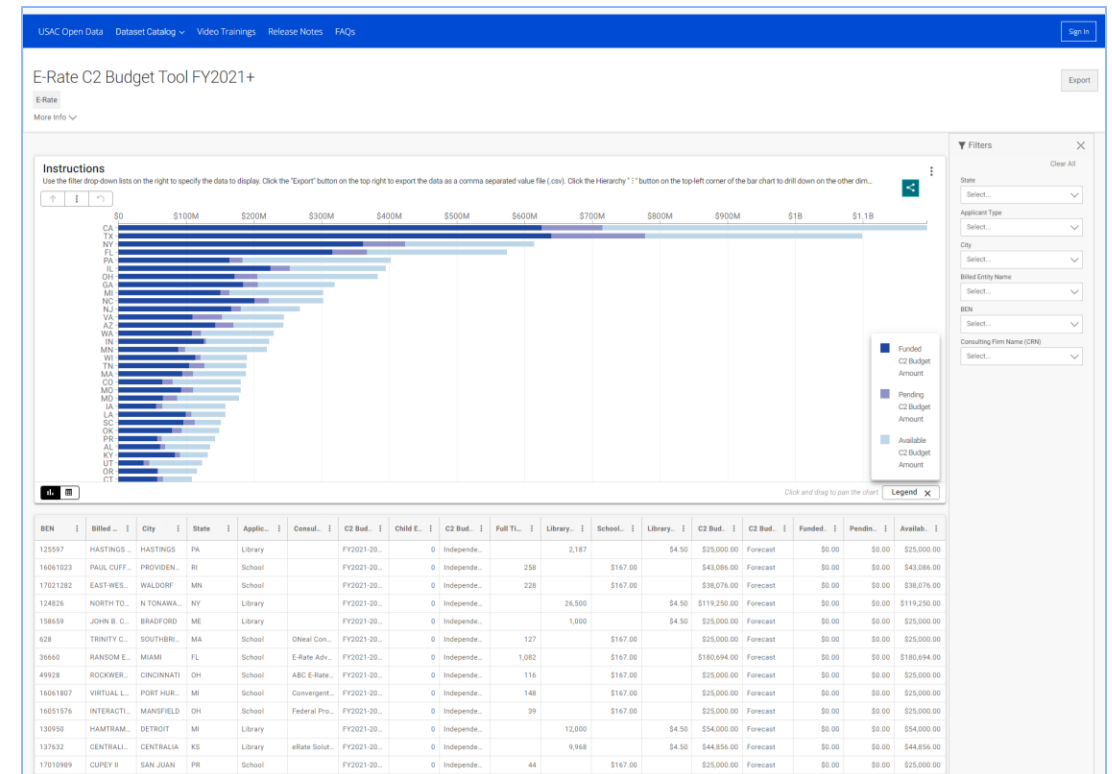
Applicat...	Funding ...	Billed En...	Form Ve...	Window ...	Billed En...	Applican...	Contact ...	Funding ...	Funding ...	FRN Nic...	Service ...	Contract...
181014537	2018	NY	Original	In Window	17014180	Bright Hope	richarderate	189902357	Pending	Verz Vs	Voice	
241022179	2024	MN	Original	Out Of Winc	16076599	Isd 2906 Re	rlccsupt@g	249902938	Pending	Elem24	Internal Cor	
241026717	2024	NY	Original	In Window	11886	Beth Jacob	joselty@bjl	249903706	Pending	2 Gig Intern	Data Transr	
241039029	2024	NY	Original	In Window	11913	Tomer Dvor	yt@tomerdv	249905722	Pending	4500 9th A	Internal Cor	
241038768	2024	NY	Original	In Window	17016385	Bnei Tzion	erate4206@	249905677	Pending	Ic Equipme	Internal Cor	
241005570	2024	MN	Original	In Window	133815	Windom Sc	ppfeffer@is	249900530	Pending	Switches	Internal Cor	

E-Rate Category Two (C2) Budget Tool FY2021+

Provides information about applicants' Category Two (C2) budgets based on the most recent entity profile and commitment data available.

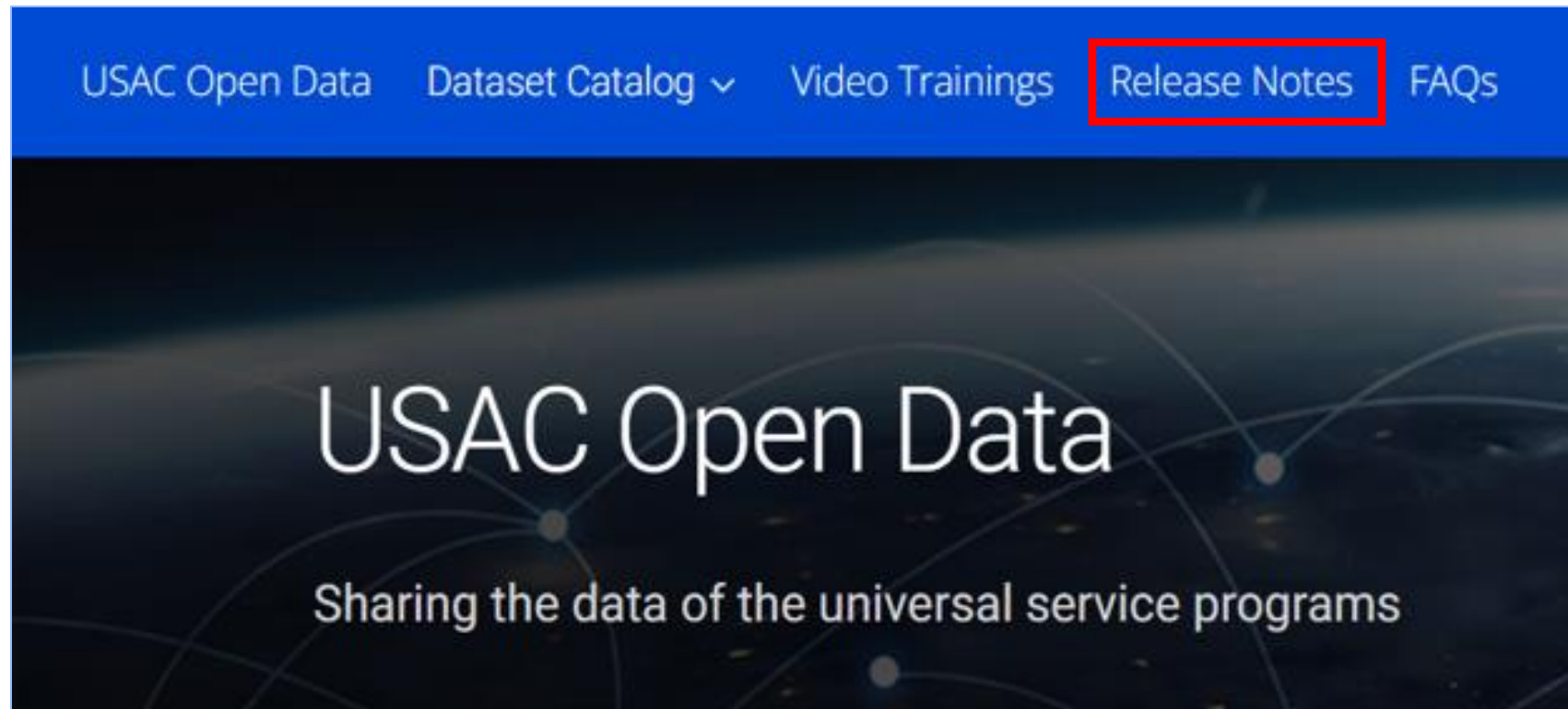
Can answer questions such as:

- How can an applicant check their remaining Category Two Budget for this current cycle (Funding Years 2021-2025)



Open Data Resources

You can find a list of all major Open Data updates (new assets, enhancements, and resolved issues) in our [Release Notes](#) page.



Dataset resources

Each dataset includes the following resources:

- List of columns with short descriptions

Column Name	Description	API Field Name	Data Type
Application Number	Unique application number is generated at the time an applicant begins to file FCC Form 471. Applicants can request funding for multiple services under the same...	application_number	Text
Funding Year	Funding year for the application.	funding_year	Text
Billed Entity State	Applicant's state.	state	Text
Form Version	Indicates whether the form version of the application is "current" or "original." It can be used to aggregate the data between current and original applications...	form_version	Text
Window Status	Indicates whether the application has been certified in the window.	is_certified_in_window	Text

- Related Content (if available)

About Data **Related Content** Actions Export

5 Results Asset type: All Sort by: Most viewed Search related assets...

E-Rate FCC Form 471 Download Tool E-Rate Public

The E-Rate FCC Form 471 Download Tool provides users with the ability to search, view, and download FCC Form 471 data for Funding Year 2016+. The tool includes filtering capability across the seven dat... Last updated July 8, 2024 Views 91283

E-Rate FRN Status Tool FY2016+ E-Rate Public

This dataset is derived from the FRN Status dataset. It provides a subset of that dataset's information, filtered for the most recent version of a given application. Last updated July 8, 2024 Views 35957

- Glossary with definitions

Attachments

E-Rate Request for Discount on Services - FRN Status Data Glossary.pdf

Universal Service Administrative Co.

E-rate Request for Discount on Services: Funding Request Number Status

FCC Form 471 and Related Information Dataset Glossary

This dataset contains data about the Funding Request Number (FRN) listed within each FCC Form 471, along with related information on the Funding Commitment Decision Letter (FCDL), wave information, the FCC Form 486, invoicing, and disbursements.

Use this dataset to answer questions such as:

- What are the individual service types?
- What quantity of service did the applicant request?
- Which service provider is supplying service and what is the length of the contract?
- What invoicing mode is being used?
- How much funding has been disbursed?

The information within the FRN information data collection from the FCC Form 471 is self-reported by applicants.

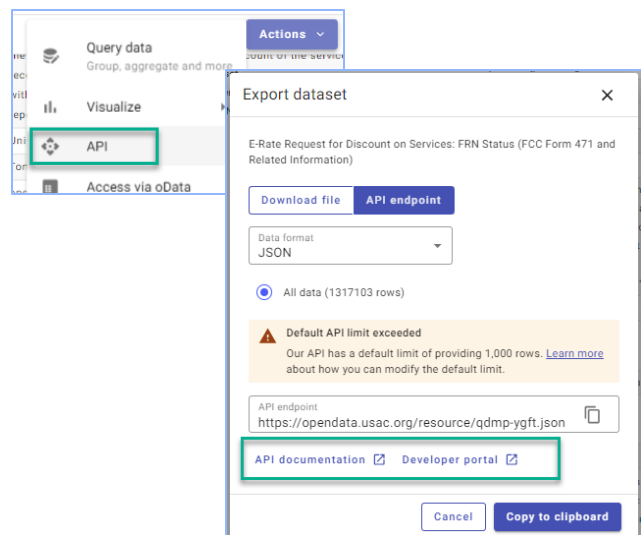
USAC is committed to sharing the highest quality data possible. We conduct a full analysis of all datasets to determine if they are complete prior to publishing. Each dataset field is described with a "field completeness" metric that ranges from 0 to 100 percent. Any value less than 100 percent indicates a field with missing values. In most cases, missing values are the result of "not required" fields.

Field Name	Field Description	Field Completeness
Application Number	Unique application number generated at the time applicants begin to file the FCC Form 471. Applicants can request funding for multiple services under the same application number. The unique application number begins with the last two digits of the funding year. This field is available in each dataset allowing for quick access of data from each of the seven FCC Form 471 data collections, at the application level. The application number is limited to customizing and creating visualizations of data to each of the seven FCC Form 471 datasets.	100%
Funding year	Funding year for the FCC Form 471.	100%
Billed Entity State	Applicant state. It can be used to aggregate commitment amount by state or filter records by state.	100%

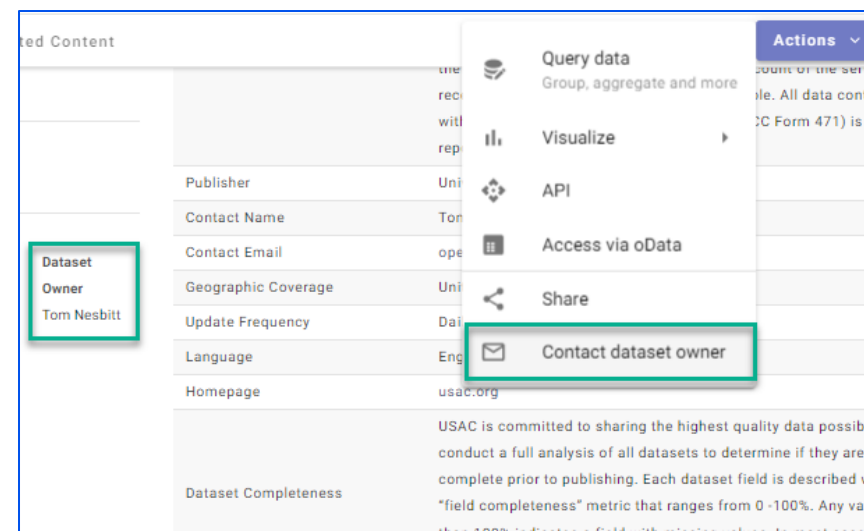
Dataset resources (contd.)

Each dataset includes the following additional resources:

- Developer and Application Programming Interface (API) documentation reference links*.
 - The Open Data API allows users familiar with programming languages to access data from datasets or views programmatically
- A “*Contact Dataset Owner*” option to submit questions related to Open Data** to USAC



*For developer/API questions, contact the Socrata support team at:
<https://support.socrata.com/hc/en-us/requests/new>



**For E-Rate program or application specific questions, contact the program team directly.
 See <https://www.usac.org/e-rate/contact-us/>

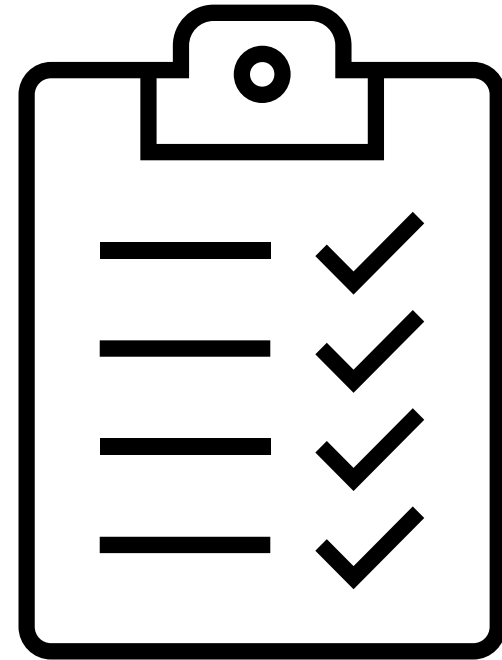
Questions?



E-Rate Competitive Bidding Process

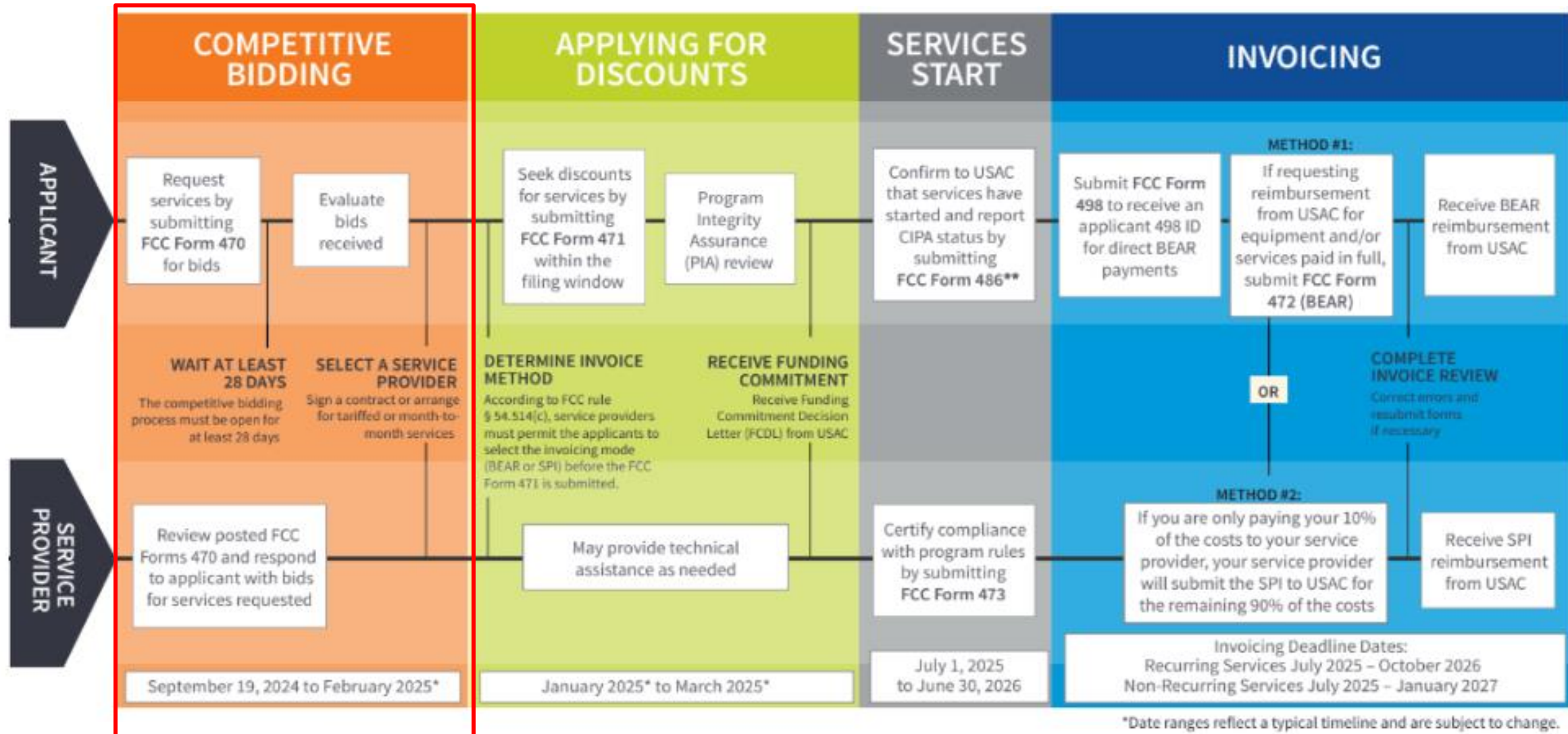
Agenda

- Applicant Process
- Competitive Bidding (FCC Form 470)
- Step 2: Selecting Service Providers
- Q+A



Applicant Process

The E-Rate Application Process



Know Your Role: Applicants

Applicants	Service Providers
<ul style="list-style-type: none"> • Determine services needed, file FCC Form 470 (and Request for Proposals (RFP), if desired). • Conduct competitive bidding process. • Select the most cost-effective bid. • Respond to Program Integrity Assurance (PIA) review questions. • File other applicant forms (FCC Forms 471, 486, 472, 500, etc.). • Document compliance with FCC rules on an ongoing basis. • Retain documentation for at least 10 years from last date of service delivery or the end of the funding year, whichever date is later. 	<ul style="list-style-type: none"> • Respond to FCC Form 470 and RFP. • May assist with responding to PIA questions on technical services (but not competitive bidding). • File service provider forms (FCC Forms 473, 474, etc.). • Document compliance with FCC rules on an ongoing basis. • Retain documentation for at least 10 years from last date of service delivery or the end of the funding year, whichever date is later. • Contribute to the Universal Service Fund, if required. See the Service Providers page on USAC's website.

Applicant Process - Overview

Pre-Commitment Steps

Request services
(FCC Form 470),
run a competitive bid
process, and select a
vendor

Request funding
(FCC Form 471)
and undergo
application review

Post-Commitment Steps

Confirm the start of
services and status of
Children's Internet
Protection Act
(CIPA) compliance
(FCC Form 486)

Request
reimbursements **(FCC
Form 472)**
OR receive discounts
(FCC Form 474)

- [E-Rate Program At a Glance for New Applicants](#)
- Call our Customer Service Center at (888) 203-8100 to set up an account in the E-Rate Productivity Center (EPC) and make sure your school or library has a Billed Entity Number (BEN).

Competitive Bidding – FCC Form 470

What Is Competitive Bidding?

- Competitive bidding is the formal process for applicants to choose the service providers who will provide the requested equipment and services.
- Service providers review the applicant's FCC Form 470 for requested equipment and services, any procurement requirements, and then submit bids.
- During the competitive bidding process, applicants may decide not to participate in the E-Rate program.

THE COMPETITIVE BIDDING PROCESS

allows applicants to identify and request products and/or services so that potential service providers can review those requests and submit bids for them.



The process consists of five steps:

- 1 Get Ready to File**
 - Perform a needs assessment
 - Review your state and local procurement rules
 - Review the [Eligible Services List](#)
- 2 File and certify an FCC Form 470**
 - Provide sufficient information for potential vendors to provide a comprehensive bid (e.g., for managed internal broadband services specify the exact equipment/services to be managed)
 - Potential bidders (service providers) cannot help you file FCC Form 470
 - You have the option to submit a Request for Proposals (RFP) with your form
 - There are [competitive bidding exemptions](#) for certain Category 1 and Category 2 (libraries only) equipment/services
 - After you certify your FCC Form 470, USAC issues a Receipt Notification Letter (RNL) with your Allowable Contract Date (ACD) – the earliest date you can enter into an agreement or sign a contract
- 3 Ensure an open and fair process**
 - Provide any FCC Form 470, RFP and other information/updates in EPC for all potential bidders for at least 28 days
 - Utilize a [Bid Evaluation Matrix](#) with price of eligible services/equipment as the primary factor.
 - Consider all responsive bids
 - The Bid Evaluation Matrix is subject to [document retention](#) rules
 - Abide by the [Gift Rules](#)
- 4 Wait at least 28 days** before selecting a service provider
 - The ACD (included on your RNL) is 28 days after the FCC Form 470 is **certified**
 - The day you **certify** the FCC Form 470 is day 1. If the FCC Form 470 is certified on the 1st of the month, you may select a service provider **on or after** the 29th of the month
 - If you later **change the information** needed to respond to the bid, you must restart the 28 days
 - If you issue an RFP on a later date, you must restart the 28 days
 - * State or Local procurement rules may require a longer waiting period
- 5 Select a service provider**
 - Select a service provider after your ACD and before certifying the FCC Form 471
 - Ensure price is the primary evaluation factor (highest weighted factor). Only the costs of eligible goods/services should be evaluated in this criterion.
 - Enter into a legally binding agreement and document the selection date (after 28 day-period)
 - Upload your legally binding agreements and contracts to EPC



Retain all necessary competitive bidding documentation for ten years after the last day you receive services or the end of that funding year, whichever is later.

For more information, visit us at the [Competitive Bidding webpage](#). If you have any questions, [contact us](#).



Publication Date: 8/19/2024



Available for Public Use

Exemptions to Competitive Bidding

- Commercially Available Business class Internet Option (CABIO) services are exempt if they meet all the following requirements:
 - **Commercially available:** Publicly available to non-residential customers in the same form and at the same rates that it is offered to schools or libraries.
 - **Low cost:** Total annual pre-discount cost for the service, including any one-time costs such as installation, does not exceed **\$3,600 per year per school or library**.
 - **High-speed:** The service must be at least 100 Mbps downstream and 10 Mbps upstream.
- As of Funding Year 2024, **libraries** requesting \$3,600 or less annually per library in Category 2 (C2) E-Rate equipment and services are exempt from competitive bidding requirements.

An applicant using a competitive bidding exemption should:

- Skip filing FCC Form 470.
- Create a contract record, if applicable (see video “Creating a Contract Record for CABIO Services”).
- File an FCC Form 471 funding application to request E-Rate support.

Plan Your Project

Plan the scope of your project and the equipment and services needed.

- Review any state or local competitive bidding and procurement (purchasing) requirements that apply to you.
- Review the [FY2025+ FCC Form 470 Services Guiding Statements Table](#) to assist with determining the services needed and being requested.
- Understand concepts of [Entity Eligibility](#) and [Service Eligibility](#).
 - Review the [Eligible Services List \(ESL\)](#) for the current funding year to see what equipment and services are eligible for E-Rate program funding.

Be Aware Of “Mixed Eligibility” Equipment/Services

- **Mixed eligibility** refers to equipment and services for which only a portion is eligible for discounts under the E-Rate program.
- In general, a [cost allocation](#), separating the eligible and ineligible costs, is required if an equipment or service:
 - Contains both eligible and ineligible components — for example, a data T1 circuit (eligible) that also has channels on the circuit dedicated to voice services (ineligible);
 - Is utilized for eligible and ineligible uses — for example, a server that is used for both caching (eligible) and video distribution (ineligible); or
 - Is delivered to both [eligible and ineligible locations](#) — for example, broadband service delivered to a school run by a church (eligible) and to the church office (ineligible).
- There is no single approved method to allocate eligible and ineligible costs. Your method must use tangible criteria that result in a reasonable allocation.

Reminder: USAC Does Not Pay for Duplicative Services

- **Duplicative services** are services that provide the same functionality for the same population in the same location during the same period of time. USAC cannot fund duplicative services.
- **Backup or redundant services** are services sought to reduce reliance on any single service provider's network during an outage and **are considered ineligible, duplicative services.**
- Services that provide necessary bandwidth requirements, such as multiple T-1 lines when appropriate for the population served and the services to be received, may not be considered as duplicative. However, the applicant must still evaluate and choose the most cost-effective option from the bids received.

Competitive Bidding Requirements

- Applicants must seek competitive bids for eligible equipment and services by [filing an FCC Form 470](#). USAC posts the FCC Form 470 on its public website. Service providers view the requests and will submit responsive bids to the applicants.
- Provide sufficient information for potential bidders to provide a comprehensive bid (e.g., for managed internal broadband services specify the exact equipment/services to be managed).
- FCC Forms 470 [must be posted for at least 28 days](#) on USAC's website before an applicant can [select a service provider](#) and enter [a binding agreement with them](#).
- Applicants must [carefully consider all bids received](#) and then select the most cost-effective service offering, using price as the **primary factor** in the bid selection. Other factors may be used in the bid evaluation process, but price of the eligible equipment and services must be weighed most heavily.

FY 2025 FCC Form 470 Updates (Available September 19, 2024)

- Adding "Mobile Service for Use on Buses"
 - Can be found under: "I seek bids for internet access and/or data transmission service."
- Adding "School Bus Wi-Fi Network Equipment"
 - Can be found under: "I seek bid for Category One network equipment or maintenance operations."
- Adding "I seek bids for wireless Internet services that can be delivered with a Wi-Fi hotspot for off-premises use."
 - Can be found under: "I seek bids for Internet access and/or data transmission service."
- Adding "I seek bids for Wi-Fi hotspots for off-premises use."
 - Can be found under: "I seek bids for Category One network equipment or maintenance and operations."
- To learn how to file the FCC Form 470 to request Wi-Fi on school buses or Wi-Fi hotspots for off-premises use, visit our [webpage](#).

FY 2025 FCC Form 470 Updates: Allowable Contract Date Changes

- RFP Upload
 - Allow users to upload an RFP document to any non-cancelled Form 470, even if that Form 470 did not originally have an RFP.
- Substantial Change Question/New Layout to RFP Upload Screen
 - New Yes/No question: Does this new RFP constitute a substantial change to your FCC Form 470?

You can learn more information about the 28-Day waiting period [here](#).

News Tasks (70) Records Reports Actions

Add an RFP to FCC Form 470
 QC Smile School District - Used for Dashboard testing - Test ACD reset - Form #250000201 - Funding Year 2025

Upload RFP

Changes to the FCC Form 470, including uploading a new RFP document, may require applicants to restart the 28-day waiting period before selecting a service provider, signing a contract, or submitting and certifying an FCC Form 471. Ministerial or clerical errors, such as updating contact information, do not require a reset of the 28-day waiting period. However, changes that materially affect the competitive bidding process, such as changing the services or equipment being requested, do require restarting the 28-day waiting period.

If you are requesting bids for additional equipment, services, or recipients of service not included on the original FCC Form 470, you may need to file a new FCC Form 470.

Please review the [USAC.org](#) for additional guidance.

Does this new RFP constitute a substantial change to your FCC Form 470? *

Yes

No

If you select yes, the 28-day waiting period will reset, and the Allowable Contract Date on your FCC Form 470 will be updated accordingly. If the new Allowable Contract Date prevents you from certifying the FCC Form 471 before the application window closes, you must request a waiver from the Commission after certifying the FCC Form 471.

Uploading a new RFP document with substantial changes and not waiting the minimum 28 days may result in denial of funding.

Please add an RFP here

UPLOAD Drop file here

▼ Associate RFP to Service Request(s)

Category 1: Data Transmission and/or Internet Access

Please select the service request(s) that apply to the RFP you are uploading.

Allowable Contract Date (ACD) Changes (cont.)

- ACD Automatic Reset
 - When “Yes” is selected for substantial change question, the allowable contract date will automatically update to extend by 28 days.
 - Day of modification/new RFP is day 1, the following day is day 2. ACD on Summary screen will change to reflect new date.
- ACD Automatic Reset Validations
 - ACD cannot be reset if the FCC Form 470 is referenced on an FRN which is not cancelled. Error message will appear.
 - FCC Form 471 cannot be certified if an FRN is citing an FCC Form 470 whose ACD is in the future. Error message will appear.
 - If the offending FCC Form 470 is removed from the application, the FCC Form 471 can be certified.

Competitive Bidding Tip

When unsure whether a service falls under one of two service types, you are allowed to request bids for **both** service types.

For example, if you are unsure whether a service falls under Internal Connections or Basic Maintenance of Internal Connections, you have the option to seek bids for both.



Competitive Bidding – State/Tribal-Wide Contract Purchasing

- A [state master contract](#) is a contract that is competitively bid and put in place by a state government entity for use by an eligible entity. When competitively bidding the state master contract, a state/Tribal-wide agency can submit a statewide FCC Form 470 that applicants can reference if they are purchasing from the state master contract.
- Alternatively, if the state master contract **was not** competitively bid using an FCC Form 470, the applicant may file an FCC Form 470 and consider the state master contract as **one of the bids** received in their bid evaluation process.

Requesting Services: Requests for Proposals

- A **Request for Proposals** (RFP) may be created to describe specific needs and circumstances in more detail.
- RFP documents are any documents that provide additional information to potential bidders on the scope or details of your project.
- For most service requests, RFPs are not required. However, you must issue an RFP for some requests if you are required to do so by state, Tribal, or local rules.
- Services on your FCC Form 470 and RFP must match.
- All RFPs and RFP documents must be attached to your FCC Form 470 in EPC.
- FCC Form 470 Upcoming Change: Allow users to upload an RFP document to any non-cancelled Form 470, even if that Form 470 did not originally have an RFP.

Avoid Common Competitive Bidding Errors

- Provide **sufficient information** for potential bidders to **provide a comprehensive bid** (e.g., for managed internal broadband services specify the exact equipment/services to be managed). Include all information needed on the FCC Form 470/RFP for potential vendors to provide a comprehensive bid.
- Ensure **price is the primary evaluation factor** (highest weighted factor). Only the costs of *eligible* equipment/services should be evaluated in this criterion.
- Potential bidders (i.e., service providers) cannot help you complete or file the FCC Form 470.
- Retain all necessary competitive bidding **documentation** for ten (10) years after the last day you receive services or the end of that funding year, whichever date is later. [Document Retention List](#)
- Ensure that **all equipment/services you request on the FCC Form 471 is listed on the FCC Form 470/RFP** (including all bandwidth speeds).
 - Specifically for Internet Access/Data Transmission Services, applicants should ensure that speeds of services requested on the FCC Form 471 are reflected on the FCC Form 470/RFP.
- Select a service provider **after your allowable contract date and before certifying the FCC Form 471**.

Step 2: Selecting Service Providers

Abide by the Gift Rules

- [Receipt or solicitation of gifts](#) by applicants from service providers (and vice versa) is a competitive bidding violation.
- Service providers may not offer or provide any gifts or thing of value to applicant personnel involved in E-Rate.
- Gift prohibitions are always applicable – not just during the competitive bidding process.
- Exceptions for gifts – limited to items worth \$20 or less, including meals or prizes, and cannot exceed \$50 from one service provider to each individual per funding year.
- Watch our [Gift Rules video](#) for more details on the gift rules.

Create a Bid Evaluation Matrix

- To evaluate incoming bids, create a [bid evaluation matrix](#) or similar document.
- Develop evaluation criteria or factors to assess the bids.
 - You can have one or multiple factors.
 - You may also use disqualifying factors.
- Assign each evaluation factor a point value or percentage.
 - Ensure that **price is the primary evaluation factor**. The **cost** of the **eligible equipment and services** must be the **most heavily weighted factor**. Only the costs of *eligible* goods/services should be evaluated in this criterion.
 - Other factors can be considered, but they must be weighted less than the price of eligible equipment and services.

Sample Bid Evaluation Matrix

FACTOR	POINTS AVAILABLE	VENDOR 1	VENDOR 2	VENDOR 3
Price of the eligible products and services	50*	20	50	40
Prior experience with the vendor	25	25	0	25
Prices for ineligible services, products, and fees	15	10	5	15
Local or in-state vendor	10	10	0	0
TOTAL	100	65	55	80

*This number must be higher than all other numbers in the same column.

28-Day Waiting Period Review and Reminders

Applicants must wait at least 28 days after certifying their [FCC Form 470](#) before selecting a service provider, executing any contracts for contracted services, or signing and submitting an [FCC Form 471](#). **The allowable contract date (ACD) is the earliest date on which an applicant can select a service provider by entering into a contract. See your Receipt Notification Letter for the specific ACD for your FCC Form 470.**

Your state or local procurement regulations may require a longer waiting period or impose additional requirements.

Frequently Asked Questions (FAQs) on the 28-day waiting period:

- **When does the waiting period start?** *The day you certify your FCC Form 470 is day 1. For example, if you certify the FCC Form 470 on 1/1/2025, you may select a service provider on or after the 29th of the month. If you make changes after certifying the FCC Form 470, you may be required to restart the 28-day waiting period.*
- **Do weekends count as a part of the 28 days?** *Yes, the minimum 28-day period is based on calendar days.*
- **When can you select a vendor?** *After the 28-day waiting period (unless your FCC Form 470 lists a later bid deadline.)*
- **When's the last day you can select a vendor?** *You must select the most cost-effective service offering before you submit the FCC Form 471.*
- **When can you stop receiving bids?** *You may set a bid deadline and include it to your narrative or RFP. This deadline must be at least 28 days after certifying your FCC Form 470 or longer depending on state rules. If you **do not add a deadline to your narrative or RFP**, you must accept bids up until you evaluate bids and make a vendor selection. These deadlines should be memorialized in your records.*

Allowable Contract Date Infographic

Sample Calendar						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	Date of RFP Upload 1	2	3	4
			Day 1	Day 2	Day 3	Day 4
5	6	7	8	9	10	11
Day 5	Day 6	Day 7	Day 8	Day 9	Day 10	Day 11
12	13	14	15	16	17	18
Day 12	Day 13	Day 14	Day 15	Day 16	Day 17	Day 18
19	20	21	22	23	24	25
Day 19	Day 20	Day 21	Day 22	Day 23	Day 24	Day 25
26	27	28	Allowable Contract Date 29	30	1	2
Day 26	Day 27	Day 28	Day 29			

Remember

If the 470 narrative or RFP does not include a bid submission deadline



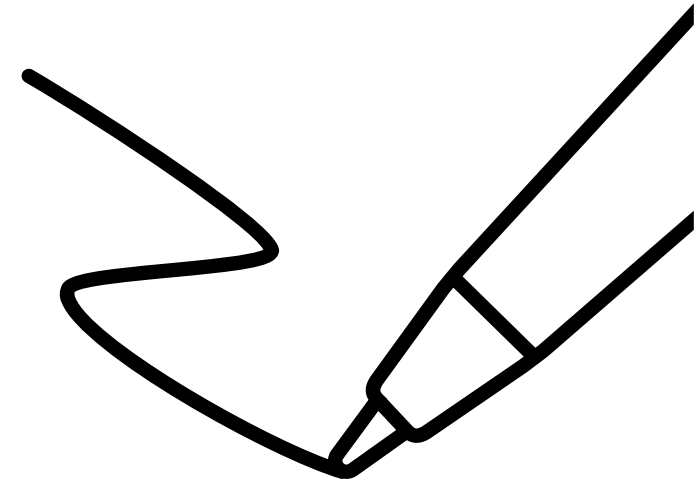
then applicants are **required** to accept all bids up until they conduct their bid evaluation.

•This is the earliest you can select a vendor.¹
 •You can wait up until you certify FCC Form 471 to select a vendor.²

¹ This may vary based on state and local procurement rules.
² You must select a vendor before the filing window closes.

What If You Receive No Bids?

- If applicants receive no bids or only one bid, they can:
 - Proactively solicit bids after waiting 28 days.
 - Ask their current provider to submit a bid.
 - Accept the one bid, if it is cost effective.
- Be sure to create a memo for your E-Rate files to document the situation.



Next Steps After the 28-Day Waiting Period



Contracts

- Applicants must have a signed [contract](#) or other legally binding agreement in place prior to submitting their FCC Forms 471 to USAC.
- Applicant must not sign a contract before the ACD on their FCC Form 470 Receipt Notification Letter (RNL), which is 28 days after the FCC Form 470 is certified.
- Signed contracts constitute the best evidence that a legally binding agreement exists.
- A verbal offer or acceptance will not be considered evidence of the existence of a legally binding agreement.
- Upload your legally binding agreements and contracts to EPC.
- Learn more on the [State Master Contracts](#) webpage.
- **Instructional Resources:**
 - [How to Create a Contract Record](#) (5:58 mins)
 - [How to Create a Contract for Low Cost High Speed Internet](#) (4:55 mins)

State Master Contracts

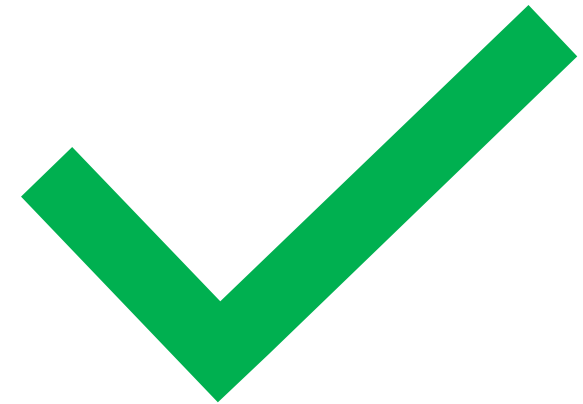
- A [state master contract](#) (SMC) is competitively bid and put in place by a state government for use by entities in that state.
- If the state files an FCC Form 470:
 - The applicant cites the state's FCC Form 470 on its FCC Form 471.
 - The applicant is required to follow the applicable provisions of the state master contract and state and local procurement laws. No separate bidding documents or contracts are required by the applicant citing the state's FCC Form 470, other than what is required by the state master contract and state and local procurement laws. The signed state master contract between the state and the service provider must meet the FCC signed contract requirement.

Review Resource for Selecting Service Providers

- [Selecting Service Providers](#) webpage
- Review the [How to Construct an Evaluation Matrix](#) webpage
- **Reminder**
 - Your [FCC Form 470](#) and your request for proposal (if applicable) both have been publicly available for the same [28-day period](#) before you can close your competitive bidding process.
 - Once you have chosen your service provider(s) and signed a contract (if applicable), you can file an FCC Form 471 to apply for funding as soon as the [FCC Form 471](#) application filing window opens.
 - Document Retention
 - You must keep all [documentation](#) for at least 10 years from the last date to receive service or the end of the funding year, whichever is later.
 - For multi-year contracts, this means 10 years from the contract expiration date.

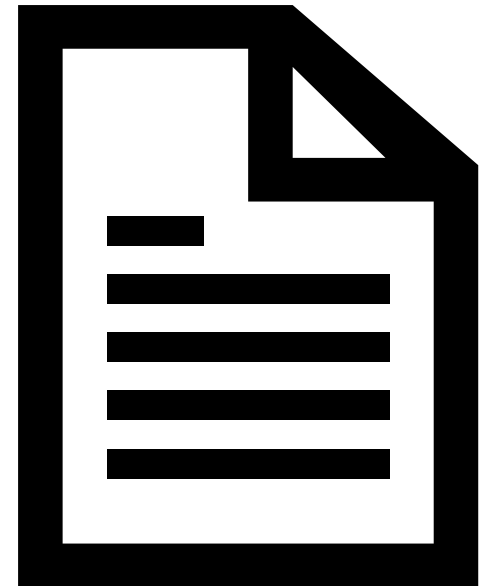
Avoid Mistakes: Establish your Contract Correctly

- The contract contains the **applicant's signature and date** of when the contract was executed.
- The legally binding agreement contains all the **material terms and conditions** and contains a **written acceptance of the offer**.
- The contract/legally binding agreement was **negotiated on or after the Allowable Contract Date** on the FCC Form 470.
- The contract/legally binding agreement was negotiated/executed **on or before the submission of the FCC Form 471**.



FCC Form 470 Review:

- Get Ready to File.
 - Review your State and Local Procurement Rules.
 - Review the E-Rate [Eligible Services](#).
- File and certify an FCC Form 470,
 - USAC acknowledges receipt of your form with a Receipt Notification Letter.
- Ensure an Open and Fair Competitive Bid Process.
 - Treat all bidders and potential bidders the same throughout the entire process.
 - Abide by FCC's Gift Rules.
- Wait at least 28 days.
- Select a Service Provider.
 - Use a Bidding Evaluation Matrix.
 - Price must be the primary factor.
 - Enter into a legally binding agreement or contract.
- For more information, see our [Competitive Bidding Infographic](#).



The Service Provider's Role

Know Your Role: Service Providers

Applicants	Service Providers
<ul style="list-style-type: none"> • Determine services needed, file FCC Form 470 (and Request for Proposals (RFP), if desired). • Conduct competitive bidding process. • Select the most cost-effective bid. • Respond to Program Integrity Assurance (PIA) review questions. • File other applicant forms (FCC Forms 471, 486, 472, 500, etc.). • Document compliance with FCC rules on an ongoing basis. • Retain documentation for at least 10 years from last date of service delivery or the end of the funding year, whichever date is later. 	<ul style="list-style-type: none"> • Respond to FCC Form 470 and RFP. • May assist with responding to PIA questions on technical services (but not competitive bidding). • File service provider forms (FCC Forms 473, 474, etc.). • Document compliance with FCC rules on an ongoing basis. • Retain documentation for at least 10 years from last date of service delivery or the end of the funding year, whichever date is later. • Contribute to the Universal Service Fund, if required. See the Service Providers page on USAC's website.

Service Providers – Bid on Services

- The **applicant** starts the [competitive bidding process](#) by posting one or more FCC Forms 470 and Request(s) for Proposals (RFP) documents, if applicable, to the USAC website.
 - These documents may include specific requirements for service providers to follow during the competitive bidding process.
- **Service providers** [review the information and bid on the requested services](#).
 - Use [FCC Form 470 tools](#) to search and view FCC Form 470 service requests and RFPs.
 - The bid should include information on E-Rate eligibility percentage and category of service.
 - The bid should be responsive to the equipment and services being requested.



Open and Fair – Service Providers

To help ensure an open and fair process, service providers should:

- **Review all the requirements**, including the FCC Form 470 and any RFP(s).
- Provide a responsive bid to what was requested by the applicant.
- Ask questions if the information provided by the applicant is unclear.
- Separate the eligible, mixed bucket, and **ineligible services** in your bid response.
- **Do not offer gifts, free services, devices, or non-E-Rate discounts** to make your response more attractive.
- **Do not offer to help** an applicant if you are also planning to respond to their bid request.

Lowest Corresponding Price (LCP)

- Service providers are required to offer applicants their services at the [lowest corresponding price](#) charged to other similarly situated customers throughout their geographic service area. (See 47 C.F.R. § 54.500)
- This rule ensures that applicants are not charged more than **similarly situated** non-residential customers for **similar services** because of E-Rate participation.
- Exceptions can be made if the provider can show that they face significantly higher costs to serve this customer due to volume, mileage from facility, or length of contract.
- Applies to all service providers and for all service arrangements (tariff, month-to-month, and contracted services).
- Document retention rules apply, even in the event of a merger or acquisition.

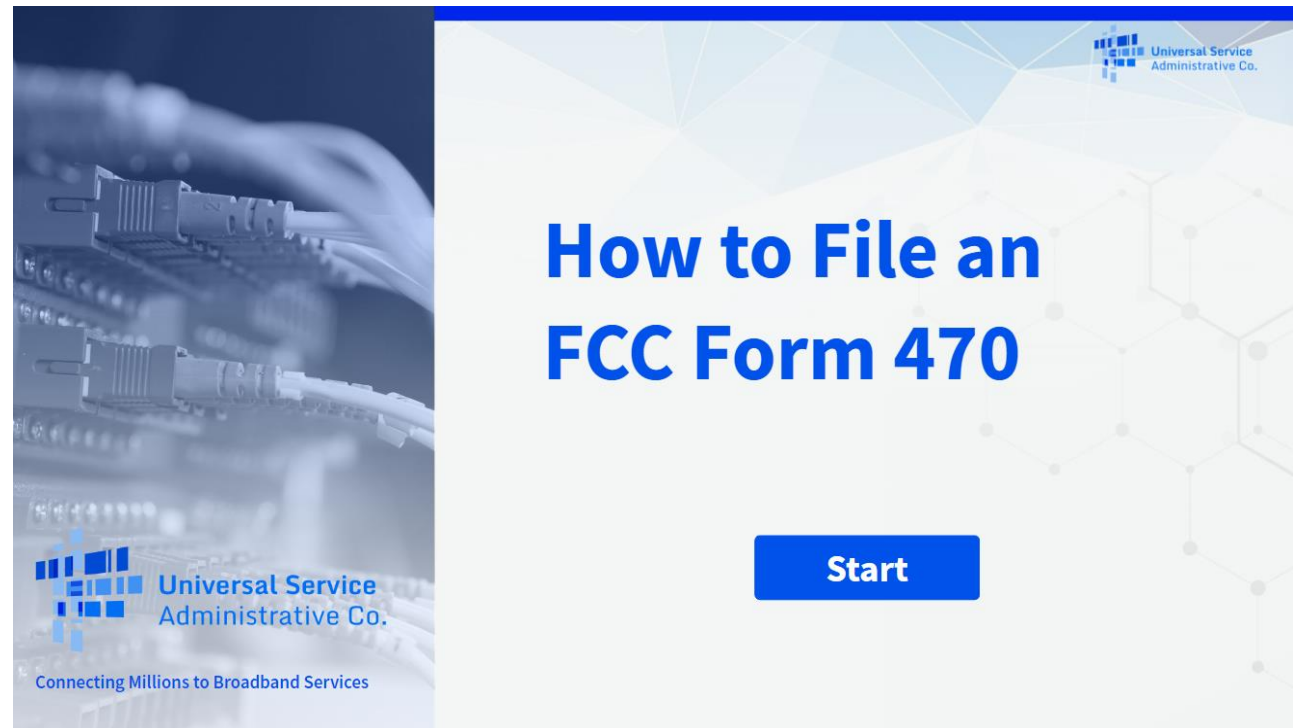
How to Find Applicant Requests (FCC Form 470)

- USAC’s [Open Data](#) platform allows users to view, search, filter, and manipulate FCC Form 470 information in each [dataset](#) and extract that data in a variety of formats.
- Use the E-Rate [FCC Form 470 Download Tool](#) to find entities with needs in your service areas and their points of contact.
- This tool, in collaboration with USAC's Open Data sets, can also be utilized to discover potential unidentified service opportunities in areas that may often receive low quantities of bid responses.
- The “E-Rate Request for Discount on Services: FRN Status (FCC Form 471 and Related Information)” dataset in USAC’s Open Data gives insight into the number of bids received in previous funding years for applicants.
- You can also use our [Entity Information Tools](#) within Open Data to narrow your search to specific types of entities, including Tribal entities or entities in underserved areas.

Resources

How to File an FCC Form 470 eLearning Module

- Form Assistance
- Begin the form: Basics
- Categories of Services
- Certifications
- [Link to eLearning Module](#)



Resources

- [Competitive Bidding Page](#)
- [Competitive Bidding Infographic](#)
- [Competitive Bidding FAQs](#)
- [28-Day Waiting Period Page](#)
- [How to File an FCC Form 470 eLM](#)
- [Guiding Statements Video](#)
- [Guiding Statements Reference Table](#)
- [Applicant Process Page](#)
- [Service Provider Process Page](#)
- [Service Provider August 2024 Webinar](#)
- [Document Retention](#)



Questions?



E-Rate Administrative Window

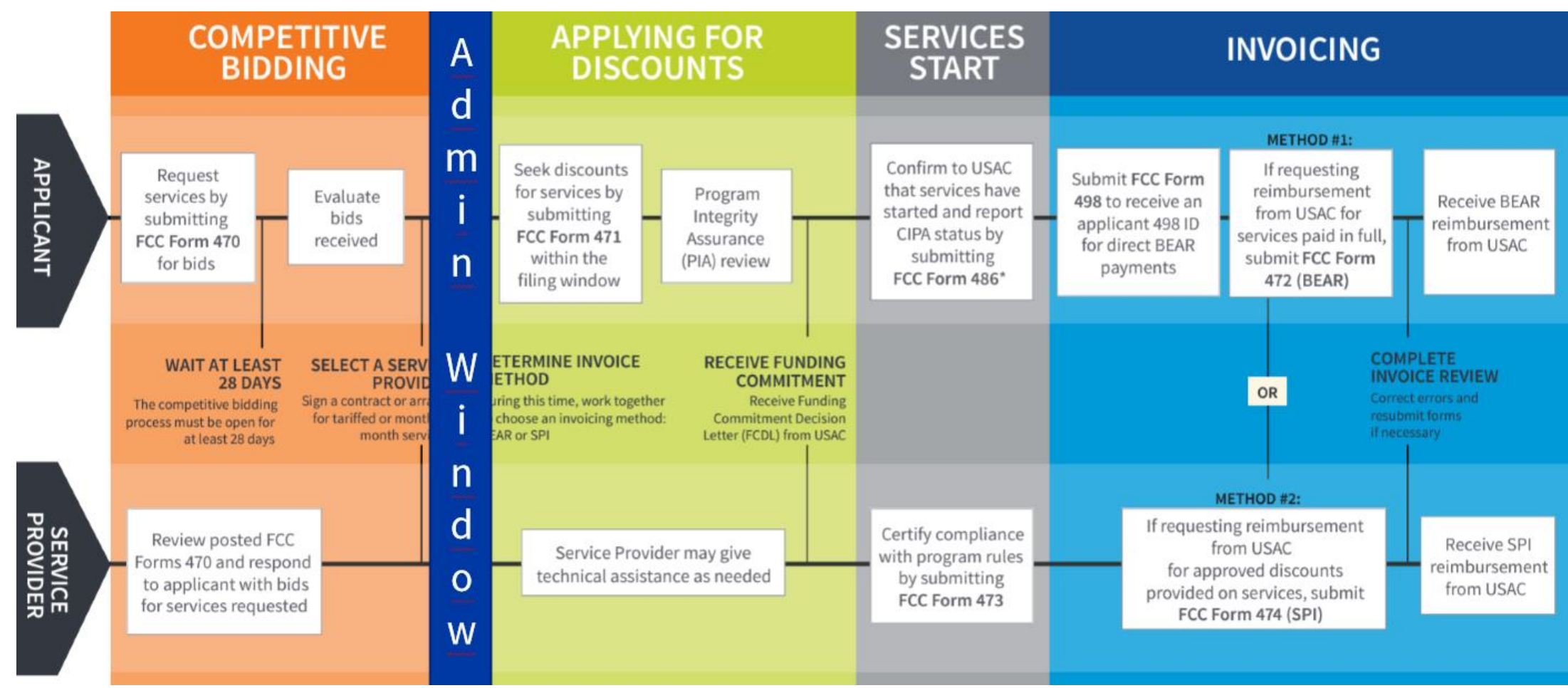
AGENDA

- What is the Administrative Window?
- What Changes to Make?
- Start Early, End On Time!
- Account Administrators
- User Rights Levels
- Administrative Window Best Practices
- Update Your Entity Profile
- What if I Miss the Admin Window?
- E-Rate Entity Search Tool
- Resources



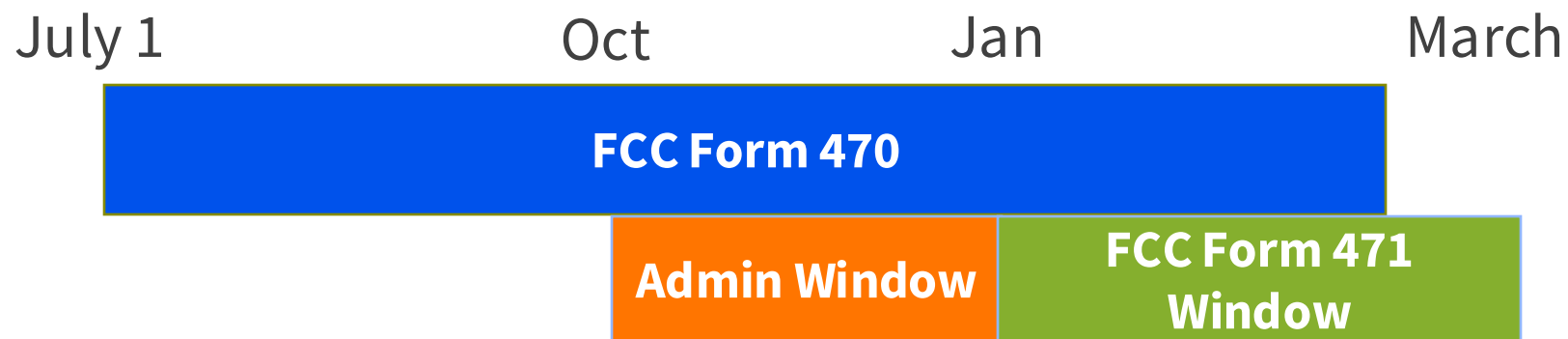
What is the Administrative Window?

What is the Administrative Window?



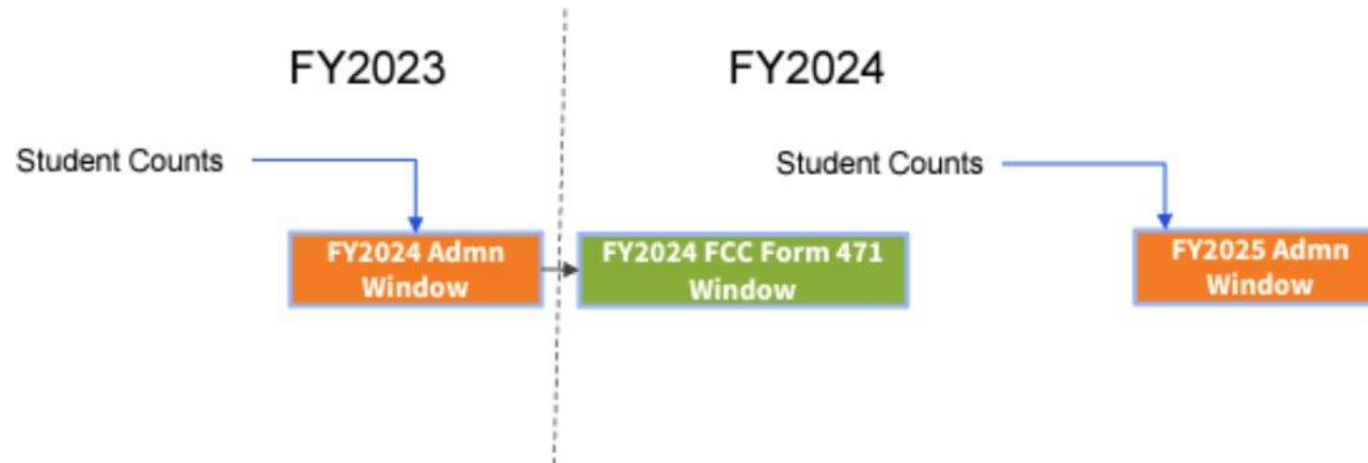
What is the Administrative Window?

- Time when applicants update their EPC entity profile information (e.g., discount rate information) for the FCC Form 471 application filing window.
 - Occurs from October to early January prior to the FCC Form 471 application filing window.
 - Official dates are announced in the E-Rate News Brief.
 - Closes as the FCC Form 471 Application Filing Window opens.
- EPC profiles are locked before the application filing window to prevent changes that impact an entity's discount rate.



Why do We Have the Administrative Window?

- Ensures consistent data for each FCC Form 471 by applicant including:
 - NSLP and full-time student counts (needed to calculate discount rates) for entities tied to a school district, library system, or consortium.
- Allows faster processing of FCC Form 471 application funding requests and reduces PIA review.
- Provides a simple self-service option for updating annual student count or entity information and reducing review time during Program Integrity Assurance (PIA) review.



What Changes to Make?

What are you updating for every Admin Window?

- EPC profile information: Address, email, etc.
- Ensure your account administrator is correct/have an account administrator
- Check user rights levels: Is there someone with full rights who can certify forms?
- Schools update student counts
- Libraries update square footage

What are you updating as needed?

- If any new entities need to be added
- Adding consultants to your account
- Replacing your Category 2 budget

What Changes to Make?

	Schools / School Districts	Libraries and Library Systems	Consortia
Account Administrator is active and current	X	X	X
Account Administrator adds new users and deactivates users that no longer work for the organization	X	X	X
Account Administrator reviews and updates all user rights by form/transaction	X	X	X
Account Administrator updates/adds consulting firm (CRN) and consulting firm users and updates rights	X	X	X
New or closed entities requested via a customer service case	X	X	X
Update entity relationships (child entities, consortia members)	X	X	X
Update student counts / library square footage; update entity subtypes / add Tribal affiliation	X	X	
Review/update entity profiles to ensure that are no errors due to missing information	X	X	
Update entity contact information and FCC registration number	X	X	X
Request an increase to your Category 2 budget, if desired	X	X	

Start Early, End on Time!

Start Early, End On Time!

- Administrative window updates
 - 103k schools need latest student counts
 - 21k Account Administrators
 - 2.4k new entities created each year
- Start early to allow enough time to complete all updates!
- Do not wait until the last week of the administrative window to make and request your changes
- If entity profile updates (e.g., student counts, new entities) are needed outside of the administrative window, this may slow down application review and delay your Funding Commitment Decision Letter(s).



Account Administrators

Who is Responsible?

- Account Administrators and partial/full rights users are responsible for updating the EPC profile during the administrative window.
- If you are unsure who your Account Administrator is, navigate to the Applicant Entity Profile page in EPC and look under the field Account Administrator.
- If your organization does not have an account administrator, call the Customer Service Center:
 - (888) 203-8100, Monday through Friday, 8 a.m. to 8 p.m. ET

EPC Account Administrator Role

- Every organization (independent school, independent library, school district, library system, consortium) with an account in EPC **needs an Account Administrator**.
- The Account Administrator **must be an employee of the Billed Entity Number's (BEN's) school or library** and cannot be a consultant.
- Consultants and Service Providers also need to create Consultant and Service Provider Accounts and Account Administrators for their EPC accounts.

EPC Account Administrator Permissions

- **Account Administrators can:**
 - Create new users.
 - Modify the rights of existing users.
 - Modify information about their organization.
 - Link or unlink their organization to consulting firms.
 - Modify (change) the Account Administrator.
 - Deactivate users who no longer work for the organization.

Account Administrator Grants User Permissions

- The Account Administrator determines which rights to grant each user.

Records / Applicant Entities
#208 - ABC School District

Summary Customer Service Modifications Additional Information Discount Rate Contracts FCC Forms FRN Appeals News **Related Actions**

Manage User Permissions

Organization Details

Name	ABC School District	FCC Registration Number	1231231234
Address	123 Street Lawrence, KS 66046	Organization Type	Applicant
Mailing Address	123 Street Lawrence, KS 66046	Phone Number	785-555-5555
		Email	kproctor66044@gmail.com

User Permissions

In the table below, you can designate the permissions that you wish to give to each of your users for the various tasks you can complete in the portal. This table will continue to grow as more functionality comes online.

- Full rights users can start, complete, submit and certify forms.
- Partial rights users can start and enter data in the form, but cannot submit and certify them.
- View Only users can only see forms created by other people in your organization but cannot create forms themselves.
- Form 498 School or Library Officials can start, complete, submit, certify, modify, and deactivate Forms 498.
- Form 498 General Financial Contacts can start, complete, and submit Forms 498, but cannot certify new or updated Forms 498 or deactivate existing Forms 498.
- Post-Commitment Full and Partial rights user can start, complete, and submit Spin Change and Service Substitution requests. Post-Commitment View Only rights can view the submitted Spin Change and Service Substitution requests.

Name	Email	Apply All	470 Permission	471 Permission	498 Permission	Post-Commitment Permission	486 Permission	Appeals Permission
Sam Schooldistrict	sam_schooldistrict@test.usac.org	▼	Full ▼	Full ▼	School or Library Official ▼	Full ▼	Full ▼	Full ▼
applicant1 test	applicanttest1@mailinator.com	▼	Full ▼	Full ▼	School or Library Official ▼	Full ▼	Full ▼	Full ▼

CANCEL SUBMIT

User Rights Levels

User “Rights” Levels

The Account Administrator determines which EPC users can view, create, certify, and submit FCC forms and requests. It is a good practice to review these levels annually and update where needed.

- A “Full-Rights” user **can complete and certify forms on behalf of the BEN**, update profile information, and receive all USAC communications regarding the BEN.
 - For example, you may determine that a **school or library official** should have this level.
- A “Partial-Rights” user can **create forms** (but not certify those forms) and update profile information.
 - You may decide that a general financial contact should have this access level.
- “View-Only” rights users can view (but not update) the entity profile and forms.

User Permissions

Abilities	Full Rights	Partial Rights	View Only Rights
Create Forms	X	X	-
Certify and Submit Forms	X	-	-
Update Profile	X	X	-
View Account	X	X	X
Respond to Outreach	X	-	-

Administrative Window Best Practices

Administrative Window Best Practices

- During the Admin Window:
 - Update all students counts based on latest data available
 - If working with a new consulting firm, add them to your account
 - If requesting the creation of 25 or more new entities, make the request during the first two weeks of the Admin Window
 - Ensure that your entity has an account administrator during the first week of the admin window

Update Entity Profile

Update Entity Profile

- To update things like address, email, etc., you must update the Entity profile.

The screenshot displays the Appian user interface. On the left, a sidebar titled 'My Applicant Landing Page' features a 'Training' section with the 'Universal Service Administrative Co.' logo. A red box labeled '1' highlights the logo area. Below the logo, the text 'Welcome, Independent School 702!' is highlighted in yellow. A dropdown menu for 'Pending Inquiries' is visible, with a 'Type' field set to '-- Select a Type --'. On the right, the main dashboard shows a navigation bar with 'appian' and a user profile icon. Below this, a toolbar contains buttons for 'CREATE A NEW USER', 'ADD OR REMOVE EXISTING USERS', and 'MANAGE USER PERMISSIONS'. A red box labeled '2' highlights the 'MANAGE USER PERMISSIONS' button, which has a dropdown arrow. A red box labeled '3' highlights the 'Manage Organization' option in the dropdown menu. The main content area shows a list of applicants with columns for 'Applicant Type' (School) and 'Status' (Active).

News Tasks (29) Records Reports Actions

My Applicant Landing Page

Training

Universal Service Administrative Co.

Welcome, Independent School 702!

Pending Inquiries

Type -- Select a Type --

appian

CREATE A NEW USER ADD OR REMOVE EXISTING USERS MANAGE USER PERMISSIONS

two Budget Contracts FCC Forms FRN Appeals New

Manage Organization

Modify Account Administrator

Create a Customer Service Case

Manage General Co

Manage Annexes

Manage Organization Relationships

Create FCC Form 470

Applicant Type School

Status Active

Update Entity Profile

- Address determines urban/rural status and to verify service delivery during invoicing

Modify An Organization

Name *	<input type="text" value="Test Entity – APPLICANT SCHOOL DISTRICT"/>	Organization Type	Applicant
Physical Address			
Address Line 1 *	<input type="text" value="2000 L St NW"/>	Zip Code *	<input type="text" value="20005"/>
Address Line 2	<input type="text" value="Suite 200"/>	Zip Code Extension	<input type="text" value="4924"/>
City *	<input type="text" value="Washington, District of Columbia"/>	County *	Other
State *	<input type="text" value="DC"/>	Please ensure that the address, city, state, and zip code are correct	
		Please Specify *	<input type="text" value="District Of Columbia"/>
		Please enter the name of the county and ensure that it is spelled correctly	

Update Related Entity Profiles

Records / Applicant Entities

#17010490 - Test Entity - APPLICANT SCHOOL DISTRICT

Summary Customer Service Modifications **Additional Information** Discount Rate Category Two Budget

Category: Related Organizations

Relationship Type: Related Entities

Entities

Entity Number	Entity Name	City
17010549	Test Entity - Test NIF	Wa
17010504	Child School 1	Ne
17010548	NIF Entity	NIF
17010506	Child Entity 2	Ne

Update Entity Profile - School

- Entity types and subtypes verify eligibility
- Student counts determine your discount rate

School Information

School Sub-Type *

Public School

Private School

Check All That Apply [Show Help](#)

Pre-K

Head Start

Adult Education

Juvenile Justice

Dormitory

Charter School

Tribal School

Is this school part of a school district?

Yes

Number of Full Time Students *

42

Total Number of Students Eligible for National School Lunch Program (NSLP) ⓘ *

30

Community Eligibility Program (CEP)? *

Yes

No

Alternative Discount Method *

None

Indicate if an alternative discount mechanism was used to calculate the number of students eli

Updating Student Counts

- Students counts from approved FCC Form 471 are in the EPC entity profile prior to the Administrative Window
- Update your students counts based on the most recent data you have during the Administrative Window
- If you receive National School Lunch Program (NSLP) and full-time student counts after the Administrative Window closes, use them for the next Funding Year
- Request a revised C2 budget if necessary. If you only changing your profile in EPC, it will not reset your C2 budget. Steps for how to request a budget recalculation in EPC are discussed below.

Updating Entity Profile - Library

- Library main branch and associated school district determine discount rate
- Square footage determines C2 budget

Library Information

Library Sub-Type*

Public Library

Private Library

Check All That Apply

Academic

Research

Tribal Library

Bookmobile

Kiosk

New Construction Library

Main Branch

Tribal College/University Library (for public use)

State Library Agency - Library

FSCS KEY

DC0039

FSCS SEQ

002

Category Two Budget Information

Square Footage*

10000

Square footage must be provided to qualify for Category Two funding.

Associated School District

BEN	NAME
17009864	Test Entity – Applicant School District

If this library is no longer a main branch, please unselect the Main Branch Checkbox

Search for School Districts

BEN Search

State Search

Please select a value
▼

FY2025 CEP Changes

- The minimum allowable Community Eligibility Provision (CEP) % changed from 40% to 25% starting in FY 2024.
- Applicants are no longer required to submit a Receipt Acknowledgement Request (RAL) for CEP % between 25-39%.
- Applicants can now update the CEP % in their EPC entity profile for 25%+.
- Reminder: Check the base year to ensure it is updated to the start of your CEP cycle.
- For more information on CEP, visit our [website](#).

User-Entered Latitude	31.0837
User-Entered Longitude	-97.5966
User-Entered Urban/Rural Status	Urban
Community Eligibility Program (CEP)?	Yes
CEP Percentage	34.55%
CEP Base Year	2022
Does this organization have an endowment?	No
Number of Full Time Students	602
Total Number of Students Eligible for National School Lunch Program (NSLP)	333

What if I Miss the Admin Window?

What if I Miss the Admin Window?

Once the Administrative Window Closes, the filing window for the FCC Form 471 applications will begin shortly after:

- EPC profiles are now “locked”: No new changes can be made that affect an entity’s discount calculation.
- Applicants would need to submit a Receipt Acknowledgement Letter (RAL Modification) after certifying their FCC Form 471.

To file a Modification Request (RAL), follow these instructions:

1. Find and open the appropriate FCC Form 471. You can find your forms on your Landing Page under Forms and Post-Commitment Requests, or from your entity Summary page under FCC Forms.
2. Filter the forms by FCC Form 471, Funding Year, and Certified.
3. Click on the FCC Form 471 that you want to update.
4. Near the top of the page (under the form name), click "Related Actions."
5. Click "Submit Modification Request (RAL)."

E-Rate Entity Search Tool

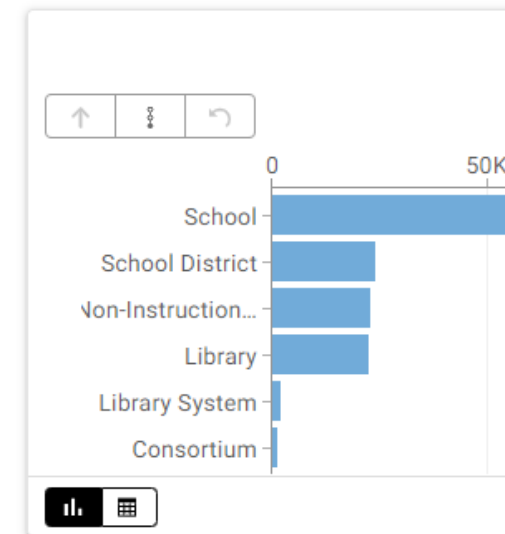
Entity Search Tool: View Current/Updated Entity Profiles

- The [E-Rate Entity Search Tool](#) available in Open Data so you can view and download entity data
- **Once you make updates to entities in EPC, the data will show in the tool the next day**
- For more information about Open Data, view our Open Data webinar trainings [here](#).

[E-Rate Entity Search Tool](#)

The E-Rate Entity Search Tool enables the search of E-Rate Productivity Center (EPC) information about schools, libraries, school districts, library systems, consortia, and non-instructional facilities (NIFs). For Annexes information, please refer to the ["E-Rate Supplemental Entity Information: Annexes"](#) dataset.

Watch the [video walkthrough](#) to learn how to use the tool.



Resources

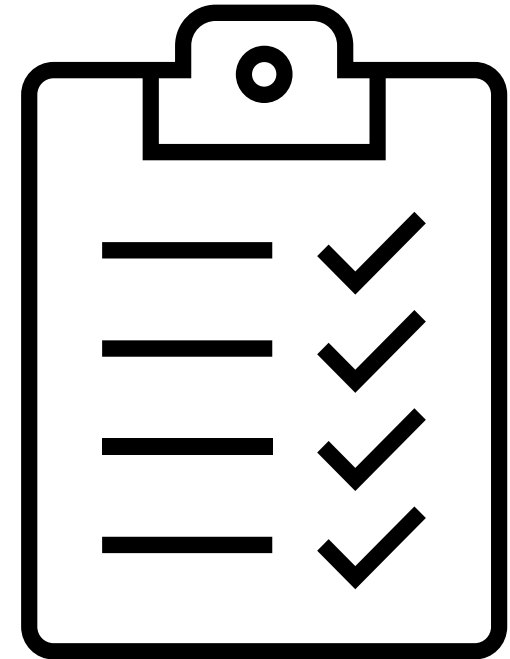
Questions?



E-Rate Pre-Commitment Process FCC Form 471

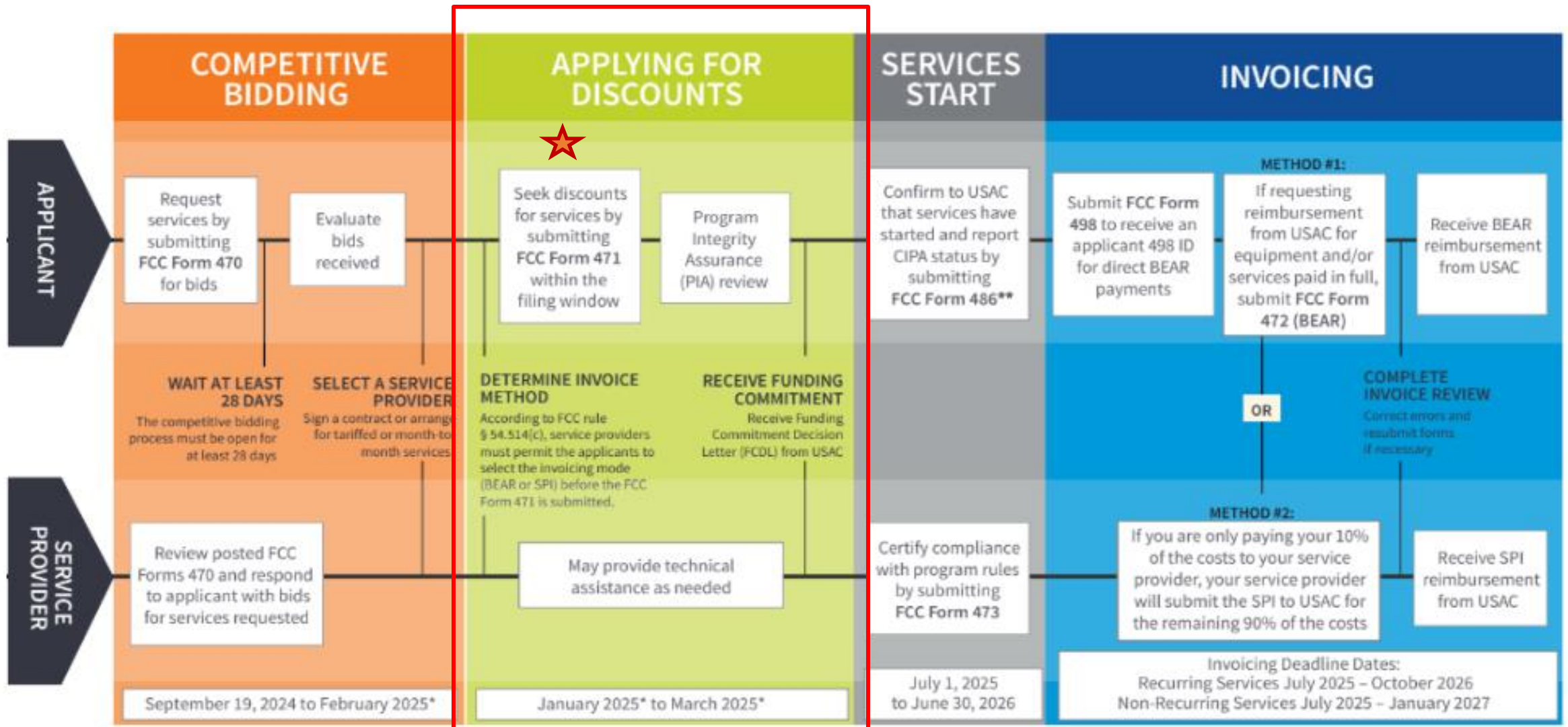
Agenda

- What is the FCC Form 471?
- Requesting Funding (FCC Form 471)
- Application Review
- Funding Commitments



What is the FCC Form 471

What is the FCC Form 471?



*Date ranges reflect a typical timeline and are subject to change.

FCC Form 471 Overview

- Applicants file an [FCC Form 471](#) (Description of Services Ordered and Certification Form) to request funding for eligible services and equipment for the upcoming funding year.
- Applicants must:
 - Include information on the recipients of services and service provider(s);
 - Provide detailed descriptions of services including costs and dates of service and/or the requested equipment; and
 - Certify compliance with program rules.
- The filing window for the FCC Form 471 – generally opens in **mid-January** and **closes in mid-March**.
- FY2025 Filing Window will close in **mid-March 2025**.
- You can file FCC Form 471 after you have completed your competitive bidding process (FCC Form 470), waited 28 days, selected your vendor(s), and signed contract(s) (if appropriate).

Your FCC Form 470 and FCC Form 471 Must Match

Your FCC Form 471 must only request equipment and services cited from the FCC Form 470.

Applicants should ensure that all equipment/services being requested on the FCC Form 471 were competitively bid via the FCC Form 470.

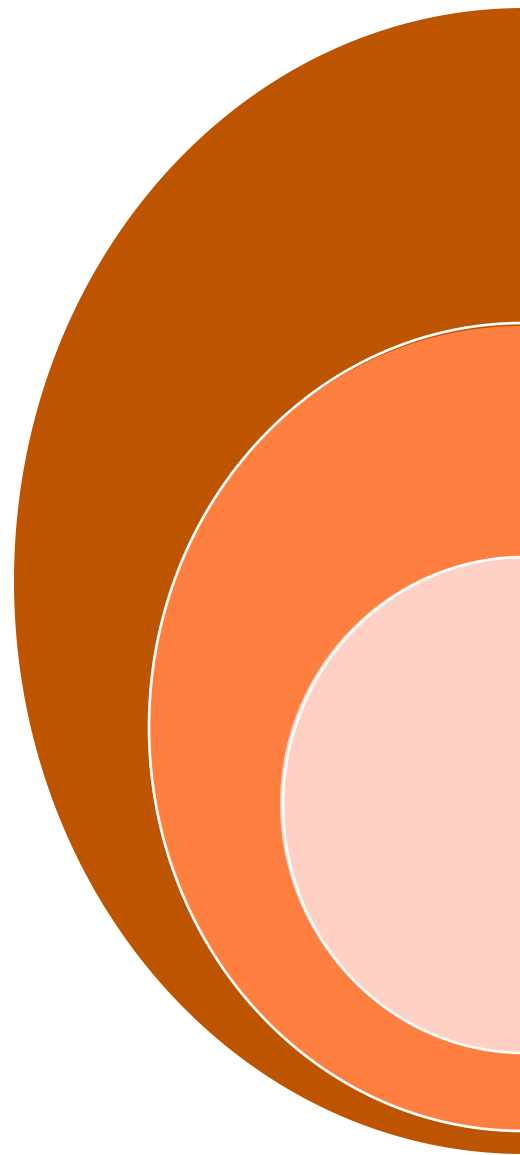
If you bid for two Category Two (C2) service types on your FCC Form 470 and invoice USAC for three C2 service types, this implies that additional information, other than what was competitively bid for, may have influenced the selection of service provider.

- This discrepancy **cannot** be corrected after competitive bidding ends.
- **You are allowed to select all three service types on your FCC Form 470 if you are unsure of what service types will be provided.**
- To avoid a competitive bidding violation, if there is time before the FCC Form 471 deadline, you would need to recertify a new FCC Form 470 with the additional service type, wait an additional 28 days, and select a service provider **after** the updated 28th day.

E-Rate FCC Form 471 Application Terms

- **Application Number** – A unique number that USAC assigns to each FCC Form 471. Each BEN can have one or more applications. C1 and C2 services must be on different applications. BENs applying for both categories of service will need at least two applications.
- **Funding Request Number (FRN)** - A unique number that USAC assigns to each funding request in an FCC Form 471. Each FCC Form 471 application can have one or multiple FRNs.
 - Each FRN must have all of the following information in common: BEN, contact information, category of service (C1 or C2), Service type (Data Transmission and/or Internet Access, Internal Connections, BMIC, Managed Internal Broadband Services), FCC Form 470, Service Provider (SPIN), contract (if you have one), and dates of service.
- **FRN Line Item** - A unique number assigned to each Line Item within the FRN, beginning with the funding request number. For example, the first line item within FRN 2399059243 would be number 2399059243.001. Each FRN can have one or multiple line items.
 - Each FRN Line Item must have all of the following information in common: Equipment or service, rates and quantities, and recipients of service (ROS).

Relationship Between Unique Numbers



Choose Category 1 or 2	C1 or C2 are filed on separate FCC Form 471s
Application Number FCC Form 471	Each FCC Form 471 is assigned a unique number
Funding Request Number (FRN) Each FCC Form 471 can have one or multiple FRNs	Each FRN must have all of the following information in common: Billed entity number (BEN), contact information, category of service (C1 or C2), service type (data transmission and/or internet access, internal connections, BMIC, managed internal broadband services), FCC Form 470, service provider (SPIN), purchase type (contract, month-to-month, tariff), contract ID (if you have one), service start and end dates.
FRN Line Item	Each FRN Line Item must have all of the following information in common: Equipment or service, rates and quantities, and recipients of service (ROS). Each may have unique or overlapping ROS. Duplicative or redundant services are ineligible.

E-Rate FCC Form 471 Application FAQs

- **What is the specific equipment or service and which category does it fall under?**
 - C1: Data Transmission and/or Internet Access, Bus Wi-Fi, Hotspot Equipment and Services
 - C2: Internal Connections, Basic Maintenance of Internal Connections (BMIC), or Managed Internal Broadband Services (MIBS)
 - If you are requesting both C1 and C2 services, you will need to put these requests on **different FCC Form 471 applications**.
- **Is this a contracted or month-to-month service? Are there multiple contracts?**
 - Services under different contracts, or services provided on a month-to-month basis, must be under **different FRNs**.
 - If services are being provided by **multiple service providers**, then **separate FRNs** must be created.
- **What is the exact type of equipment or connection being requested?**
 - C1 Example: Fiber Ethernet vs Copper Cable Modem
 - Since both fall under Data Transmission/Internet Access, they may be able to share an FRN using separate line items.
 - C2 Example: Switch vs a License providing basic maintenance services
 - Since these are separate service types (i.e., internal connections and basic maintenance of internal connections), they require separate FRNs.
- **Are the start date or end date of services different?**
 - If either are different, **different FRNs** must be created.

Common FCC Form 471 Application Errors

- **Not correctly classifying the category of service or equipment/service type on the Form 470**
 - Determine the equipment/services you need and contact the CSC to verify correct classification of equipment and services.
 - Competitively bid for all necessary equipment and service types by filing an accurate Form 470 that accurately describes the equipment and service(s).
- **Filing an inaccurate Funding Request Number (FRN) with the wrong equipment or service type**
 - Work with your service provider to ensure that equipment and services are accurately represented on the FCC Form 471.
 - Contact the CSC or your Program Integrity Assurance reviewer with any questions.
- **Failing to remove ineligible services and equipment**
 - Work with your service provider to determine whether your requested equipment and services is 100% eligible.
 - Remove any ineligible amounts when creating your FRNs(s).

Eligible Software: Key Reminders

- Software can fall into two service types.
- Commitments for different types of software can be for different term lengths.
 - Right to Use Licenses Purchased with Internal Connections – **All years** of the license contract can be billed in a single funding year.
 - For a 3-year contract for 100% eligible licenses at a pre- discounted amount of \$12,000, the full amount of \$12,000 could be entered into a single funding request number (FRN) for that funding year.
 - Software updates are considered basic maintenance of internal connections (BMIC) – Only the **current year** of service can be included in a single funding year, and multi-year software contract amounts must be prorated.
 - For a 3-year contract for 100% eligible BMIC services at a total pre-discounted amount of \$12,000, the FRN could only reflect a single year of expenses, or \$4,000, in a **single funding year**. BMIC services can only be invoiced after they are actually provided/performed.

How to File FCC Form 471

- After you have selected a service provider and made sure that your profile contains the most accurate data, gather information you will need to file your FCC Form 471 (see [FCC Form 471 Checklist](#))
- File FCC Form 471 through the E-Rate Productivity Center
- For more information on the FCC Form 471 application process, see [FCC Form 471 Videos](#) on USAC's website.

**Apply for
Discounts
471**

FY2025 Dates

January 2025

To

March 2025

“Out of Window” Applications

- In FY2024, if you had certified your FCC Form 470 after **February 27, 2024**, you would still have needed to wait 28 days before certifying FCC Form 471.
- You would not have been able to certify your FCC Form 471 before the filing window closed on March 27.
- In this situation, file **and certify the FCC Form 471 as soon as you have waited 28 days and selected the most cost-effective service offerings**. You will then need to file a waiver request with the FCC. Basic instructions for filing the FCC Window Waiver Requests are on the [FCC Form 471 Filing](#) page.

Program Compliance

Protecting the USF and E-Rate Program

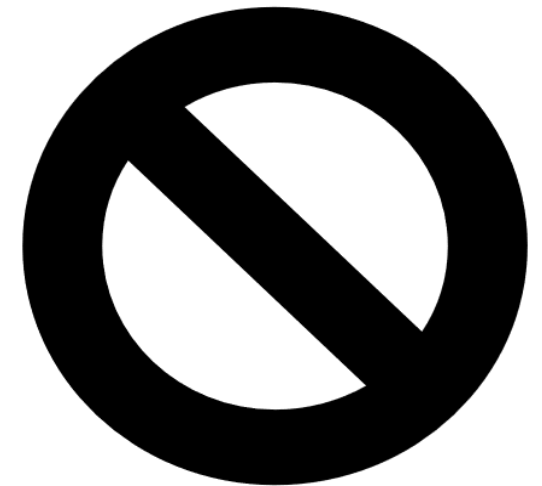
As we focus on preventing fraud, waste, and abuse, **it is extremely important to take document retention seriously, ensure compliance with program rules, and avoid the appearance of fraudulent activity.**

Beneficiaries must comply with program rules and provide USAC, as well as the FCC, with full and correct information, upon request.

- E-Rate is a federal program established by the FCC under 47 C.F.R. Part 54
- Violations of E-Rate program rules, certifications, and/or the United States Code (U.S.C.) are subject to criminal prosecution and financial recovery.

In our role as stewards of the E-Rate program, USAC must:

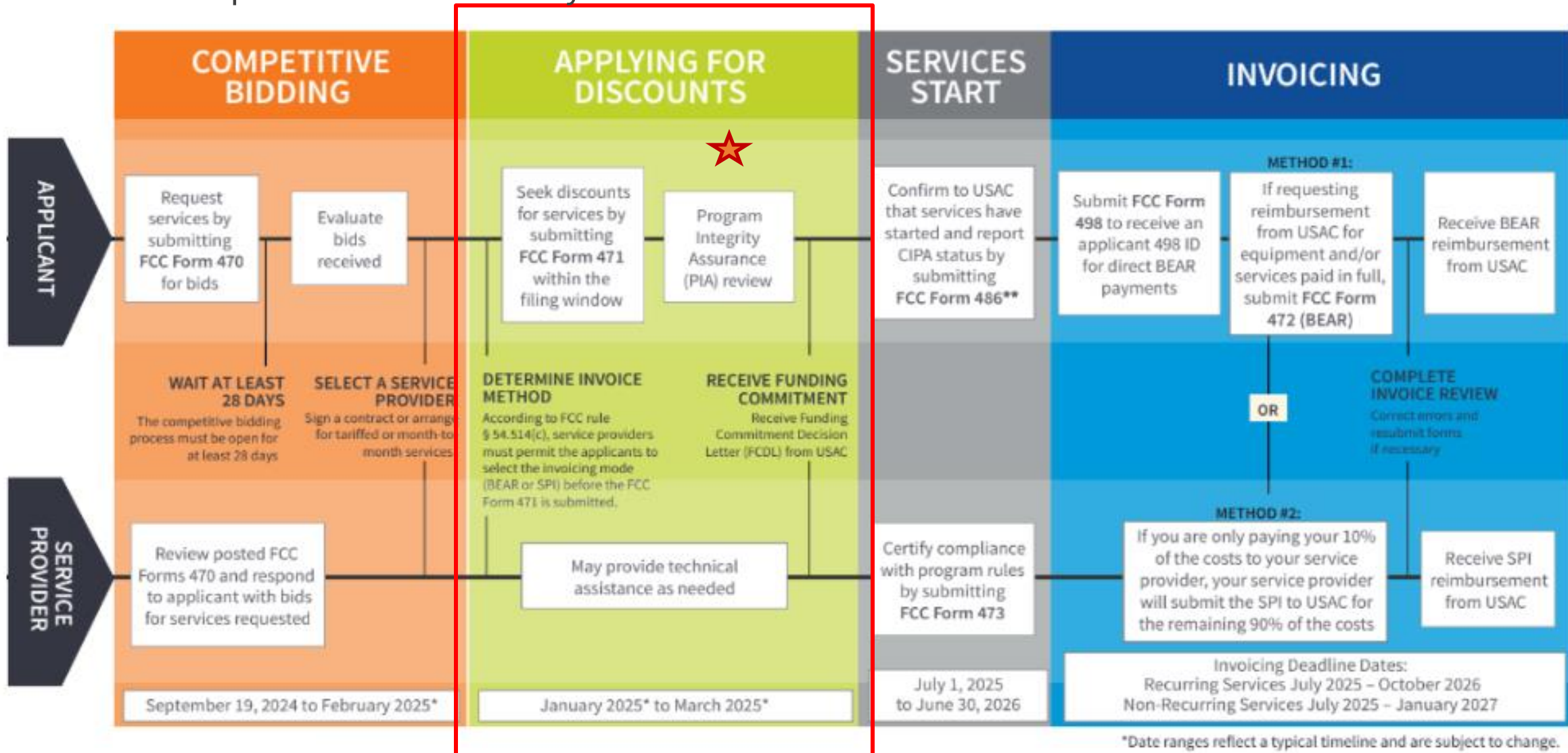
- Process and evaluate information received from program participants and universal service fund contributors.
- Conduct [audits](#) to ensure that funds are being used properly.
- Support investigations by law enforcement for E-Rate and USF.



Application Review

Program Integrity Assurance (PIA) Review

After applicants certify an FCC Form 471 within the filing window, PIA reviewers check the information on the form for completeness and accuracy.



Before Your PIA Review – Review Your FCC Form 471

- After certifying your FCC Form 471, and while you are waiting for your program integrity assurance review, there are some areas you should double-check for accuracy.
- If you find any information that should be corrected or updated, you can submit a [Receipt Acknowledgment Letter \(RAL\) Modification Request](#).
- If you are using a new or existing contract on your FCC Form 471, you must have a contract **record** uploaded to your EPC profile.
 - To create that record, go to your organization page and click **Contracts**, then **Manage Contracts** and **Add a New Contract**.

Funding Commitments

Funding Commitment Decision Letter

- After the program integrity assurance review process has been completed, USAC issues a Funding Commitment Decision Letter (FCDL) containing USAC's decisions on your funding requests.
- You can find this decision in the Newsfeed in your organization's EPC account.
- You should review this decision carefully, as it contains important information both for planning to start services and for completing the additional steps in the application process.
- If you disagree with one or more of the decisions in your FCDL, you can [appeal](#) to USAC.

Additional Resources

- [FCC Form 471 Filing page](#)
- [FCC Form 471 e-Learning Modules](#)
- [FCC Form 471 Download Tool](#)
- [FCC Form 471 Submission Checklist](#)



Questions?



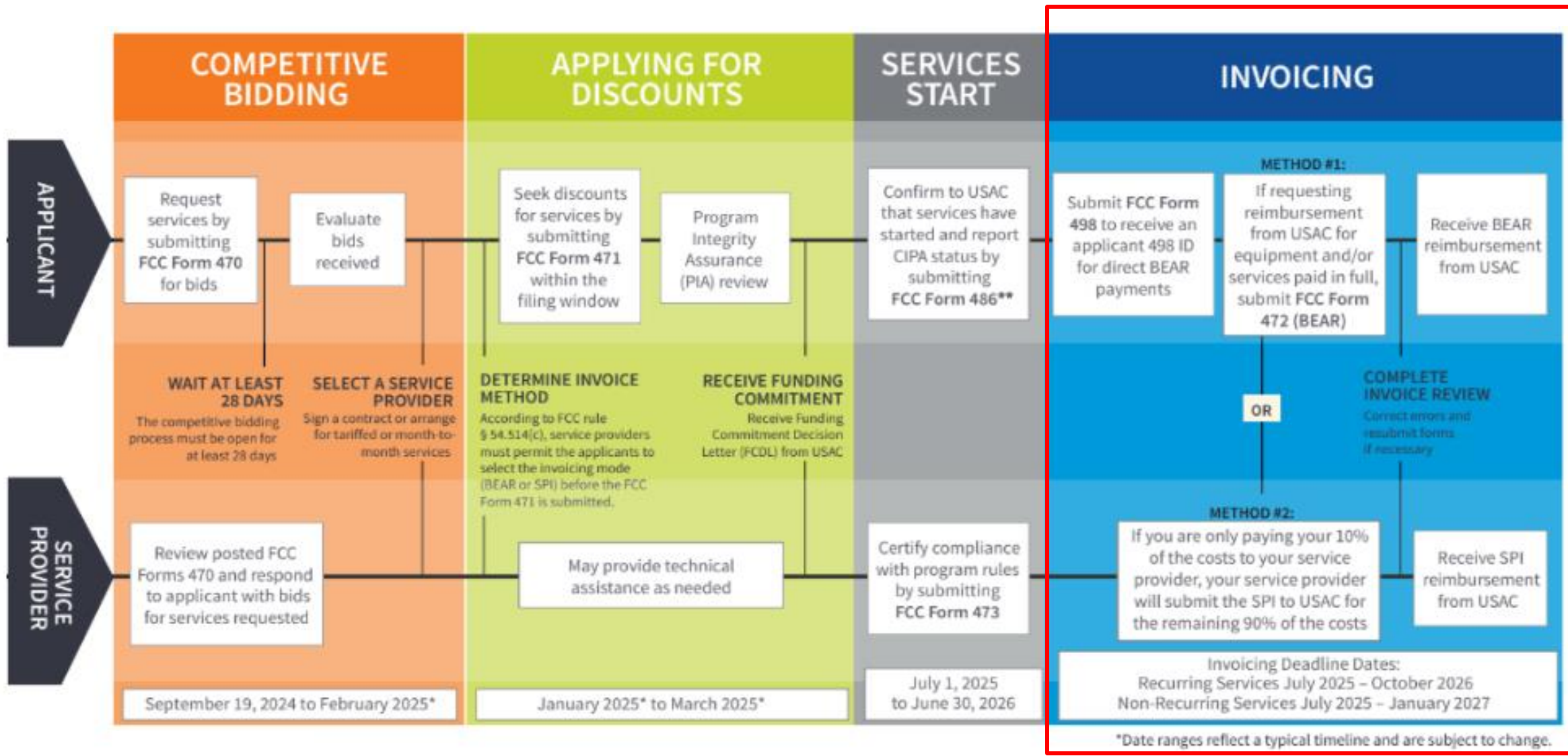
E-Rate Invoicing

Agenda

- Invoicing Overview
- Preparing to Invoice
- Filing an FCC Form 498
- Filing an Invoice
- Invoice Reviews
- Record Retention and Open Data
- Key Takeaways

Invoicing Overview

What is Invoicing?



Invoicing: What's New

- Invoices for 2016 and onward – are now processed in EPC (Began in November 2023)
- Invoices 2015 and prior – are processed via customer service case
 - FY 2015 invoices and earlier will remain in the legacy system
 - Download form (dated 2016) in existing format, complete it, then open a customer service case to get it processed.
- Disbursement Schedule – Changing to once per week in October 2024
 - Even though a lot has changed, **many things have remained the same** including:
 - The program rules.
 - The required 10-year documentation retention period.
 - The eligibility of equipment and services.

There are Two Ways to Invoice USAC

Billed Entity Applicant Reimbursement (BEAR) Form (FCC Form 472)

- **Applicants pays the customer bill** (the bill you receive from your service provider) **in full**
- Applicant files the BEAR Form and invoices USAC for the approved equipment and services delivered to the approved Recipient(s) of Service (ROS) at quantities and rates not exceeding what was approved on the **FCC Form 471**.
- Respond timely to any USAC invoice review questions.
- Applicant must update and certify the FCC Form 498, providing your banking information and backup documents.

472
(BEAR)

There are Two Ways to Invoice USAC (Continued)

Service Provider Invoice (SPI) Form (FCC Form 474)

- Applicants pay **only their non-discounted share** of costs on the customer bill (the bill from their service provider).
- Service providers invoice USAC for the discounted amount using the FCC Form 474 (SPI Form).
- Respond in a timely manner to any USAC invoice review questions.

474
(SPI)

Preparing To Invoice

Before You Begin

Select invoicing method (either BEAR or SPI):

- The invoicing mode/method is the applicant's choice and is made for each Funding Request Number (FRN).
- The applicant must decide on a method before invoicing begins.
- Once USAC processes an invoice for an FRN, the method of invoicing is set. Applicants may only change the invoicing method via a customer service case and by returning the already disbursed funds.
- Applicants should notify their service providers of the invoicing method per FRN (FCC Form 472 or FCC Form 474).
- Both the applicant and the service provider should ensure that there is at least one full rights user for each BEN or SPIN. Two full rights users are recommended.

Before You Begin (Continued)




EPC User Rights

- Account Administrators are responsible for ensuring profiles are updated .
 - Names/emails/permissions should be reviewed, and updates made as changes occur.
- Updated profiles and permissions ensure timely communication, invoice reviews, and disbursements.
- Account admins must ensure proper invoicing permissions. Without the proper permissions under the below categories, invoicing reviews may be delayed or denied.
 - Applicant – BEAR/472 Permission
 - Service Provider – Invoice Permission

Invoicing User Rights Levels

Types of EPC Rights

- **View Only Rights** – Can view certain information about invoices or post-commitment transactions.
- **Partial Rights** – Can view and prepare invoices and post-commitment requests but cannot certify any forms nor reply to USAC outreach . All certifications must be sent to a Full Rights user.
- **Full Rights** – Can view, prepare, submit, and certify the forms and any post-commitment requests. A Full Rights user can provide responses to outreach from USAC reviewers and sign/certify documents sent for review/response.
 - It is recommended that you have at least two full rights users, so if one is out of the office for any reason, your invoice is not delayed.

	View Invoices	Create Invoices	Certify Invoices	View Outreach	Respond to Outreach
 Full	✓	✓	✓	✓	✓
 Partial	✓	✓		✓	
 View Only	✓			✓	

Note: There should never be a circumstance in which the view only or partial rights user submits invoices or certifies any forms. This includes, completing a form and sending to the full rights user to submit. A certification signed by anyone other than a full right user, will be denied.

Before You Begin (Continued)

Decide the invoice frequency:

- Monthly, bi-monthly, quarterly, one-time, etc.

Use the Funding Commitment Decision Letter (FCDL) or the Revised Funding Commitment Decision Letter (RFCDL) information to complete your invoice:

- Approved services, costs, and quantities
- FCC Form 471 number and FRN
- Approved Recipients of Service (ROS)

Before You Begin: FCDL (example)

- **Pre-Discount:** (example: \$18,360 billed to the applicant based on quantities and unit rates as applicable)
- **Discount Rate :** (example: 40%)
- **E-Rate Discounts :** (example: $\$18,360 \times .4 = \$7,344$)
- **Non-Discount Amount:** (example: $\$18,360 - \$7,344 = \$11,016$)

FRN Calculation

Monthly Charges		Total Requested Amount	
Total Monthly Recurring Charges	\$1,530.00	Total Eligible Pre-Discount Recurring Charges	\$18,360.00
Total Monthly Ineligible Charges	- \$0.00	Total Eligible Pre-Discount One-Time Charges	+ \$0.00
Total Monthly Eligible Charges	= \$1,530.00	Total Pre-Discount Charges	= \$18,360.00
Total Number of Months of Service	x 12	Discount Rate	40%
Total Eligible Pre-Discount Recurring Charges	= \$18,360.00	Funding Commitment Request	= \$7,344.00

Service Provider Verifications

The Service Provider Annual Certification (SPAC) form (FCC Form 473)

- Service Providers file the SPAC annually certifying that they will comply with program rules and guidelines.
- Service Providers must file the Service Provider Annual Certification (SPAC) form each funding year for each Service Provider Identification Number (SPIN).
- The SPAC form must be filed before USAC can pay invoices.
- For step-by-step directions on how to complete the SPAC online, please see E-Rate Program [FCC Form 473 \(SPAC\) User Guide](#).
- Utilize the [Open Data FRN Status Tool FY2016](#) to verify the status of your SPAC form.



Filing an FCC Form 498

Filing an FCC Form 498 (Continued)

Prior to beginning the FCC Form 498 registration, applicants and service providers, should have the following information:

- Name of the Company Officer who will be certifying.
- Electronic banking information (routing number and banking account number).
- [Unique Entity Identifier \(UEI\) through SAM.gov.](#)
- [FCC Registration Number \(FCCRN\).](#)

FCC Form 498 Review

USAC will verify your account information within two (2) business days, and the submitter will be notified of the approval or rejection via email.

- Once the FCC Form 498 is certified, you will receive an email from 498BankVerification@usac.org with a link to upload requested banking information.
 - A blank voided check or a copy of the bank account statement is acceptable documentation.
 - If you do not control your bank account, USAC requires a letter from the account owner (i.e., State/District/County Office/School District) or financial institution to confirm the account information.
- To check the status of your 498 ID, contact the Customer Service Center at 888-641-8722, option five (contributors) or email USAC at finops-processing@usac.org.

FCC Form 498 Updates

You are **required to update your 498 ID** form under the following circumstances:

- Your banking information has changed (supporting documentation is required)
- You need to update information on an existing 498 ID:
 - A new entity
 - Update the "New Business Type" field
 - Add a Unique Entity Identifier (UEI)

Updates are not effective until the form is completed and **certified by your School or Library Official and reviewed by USAC.**

FCC Form 498 Reminders

- If the status of a 498 ID is **not certified** by the Library or School and approved by USAC, **it will prevent approved invoices from being processed** by the US Treasury. (When a 498 ID is uncertified, the banking information is not available to the US Treasury). All payments that cannot be processed are returned to USAC as unpaid.
- Try to avoid making changes to the 498 ID while invoices are in process. If changes must be made, such as updating or deactivating your current 498 ID for a new 498 ID, please make sure all invoices currently in process have been completed.
- Some reasons why your 498 ID may be missing when you log in to file your BEAR:
 - Uncertified recent changes to your FCC Form 498 or banking information
 - Typographical errors
 - Missing banking information
 - 498 ID is not linked to your BEN

Filing an Invoice

E-Learning Modules

Applicant E-Learning Modules:

- [App Course 1: Submitting and Certifying Invoices in EPC](#)
- [App Course 2: Invoice Management and Status in EPC](#)
- [App Course 3: Invoice and Outreach in EPC](#)
- [FCC Form 472 BEAR Form](#)
- [E-Rate Invoicing Open Data Set and Tool Demo](#)

Service Provider E-Learning Modules:

- [SP Course 1: Submitting and Certifying Invoices in EPC](#)
- [SP Course 2: Invoice Management and Status in EPC](#)
- [SP Course 3: Invoice Notification and Outreach in EPC](#)
- [SP Course 4: Submitting and Certifying ESPI in EPC](#)
- [FCC Form 474 \(SPI Form\)](#)
- [E-Rate Invoicing Open Data Set and Tool Demo](#)

When to File an Invoice

- Invoices **must be submitted before** the invoice filing deadline.
 - Generally, the date is October 28 for recurring services and January 28 for non-recurring services.
 - Current **Invoice Deadline Dates (IDD)** are posted in EPC on the **FRN detail screen**.
- The **IDD is no later than 120 days after** the latest of the following:
 - The last date to receive service (or service delivery deadline).
 - The date of the FCC Form 486 Notification Letter.
 - The date of an approved post-commitment RFCDL.
 - The date of an approved appeal RFCDL for a previously denied or reduced funding request.

Knowledge check

1. Can you get an extension on your IDD?



Invoice Deadline Extension

- Filers are entitled to one, 120-day Invoicing Deadline Extension per FRN.
- You can file an invoice filing deadline extension request even if you do not use or need it.
- You must file your invoice or deadline extension request **BEFORE** the invoice deadline.
- [Extensions are filed by the applicant and service providers within EPC.](#)
- If the deadline to file an invoice or request an invoice filing deadline extension is missed, a request to waive the invoice filing deadline must be filed with the FCC and approved before any additional disbursements are made.

Invoicing Reminders

- Payments:
 - BEAR Invoices: Applicant pays the service provider **in full within 90 days of receiving services and before invoicing USAC.**
 - SPI Invoices: Applicant pays the service provider their **non-discounted** portion within **90 days of receiving services.**
- **Invoice USAC only for your FCC Form 471 approved eligible equipment and services, in the correct quantity and rates, and delivered only to the approved Recipient(s) of Service.**
- Invoiced amount to USAC must be for **actual charges**, not the amount committed through the E-Rate program.
- Manual calculations for **prorated** amounts must be accurate.
- Billed rates **must not** exceed the contracted rate.
 - USAC will **only pay** up to the **contracted rate.**
- Make sure all equipment purchased is **installed** and in use before the **Service Delivery Date.**
- Establish a process to **prevent duplicate** invoice submission.

Invoicing Reminders

Contract Expiration date (CED) versus Invoice Deadline Date (IDD)

- **CED** – USAC will not pay for services delivered outside of the contract expiration end date. For example, if the CED is 3/1/2024 and the funding year spans from 7/1/2023 - 6/30/2024, we can **only pay until the contract expiration** date of 3/1/2024.
- **Incorrect CED** can be fixed via an **FCC Form 500**.
- IDD is the last day to submit an invoice to USAC for an approved FRN.

Invoice Reviews

Invoice Review

All invoices undergo a series of automated reviews to validate information such as:

- FCC Form 471 number
- Available funding
- Funding Request Number (FRN)
- Service Provider Annual Certification (SPAC) Form (FCC Form 473)
- Invoice Deadline Date (IDD) and Service Delivery Deadline (SDD)

Errors in any of the above will prevent customers from submitting their invoice in EPC or result in rejection.

Invoices may also go through a manual review process.

Manual Invoice Review: Validations

The reviewer verifies, among other things, that:

- The customer's bill accurately reflects the invoiced amount
- Entities listed on bills are approved Recipients of Service on the approved FCC Form 471
- Amount requested is supported by the bills submitted
- Service provider named on the bills matches the FRN
- Bandwidth speeds
- Equipment and services are eligible and approved on the FCC Form 471's Funding Commitment Decision Letter.
 - Ineligible equipment and services that are not removed at submission are removed during the invoice review.
 - Changes in services or equipment not received requires USAC-approval via a service substitution.
 - Ensure that service substitution requests are submitted to the E-Rate program for approval when the original eligible equipment and services requested are substituted.
 - Ensure that processes are in place to guarantee that the invoiced services match the contracted services.

Manual Invoice Review: Service Certification

Some manual reviews require additional documentation to demonstrate:

- The applicant paid their **non-discounted** costs.
- The invoiced equipment or services were **delivered** and/or **installed**.
- Progress payments were included in the contract.
- USAC validates the documents to ensure the requested amount is for eligible equipment and or services.

USAC reviewers may send questions to the applicant or service provider with a response due by "response requirement date."

Applicant and service provider should be **timely in responding to outreach** as failure to respond may result in the invoice being **denied**.

Only an applicant with full user rights completes the certification and returns it directly to USAC.

Service Certification – Example Email

Verbiage sent in the EPC outreach window regarding request:

Please see the attached service certification that I am requesting in order to complete an invoice request from your service provider. Please ensure an authorized party review and signs, returning the signed document timely for review. if you have any questions. please contact me.

Thank you for you cooperation and continued support of the Universal Service Program.

SERVICE CERTIFICATION

Please also provide the attached Service Certification form. **Only an authorized representative of the applicant (school/library) (with "Full" rights for BEAR/472 permission or the account admin rights in the E-Rate Productivity Center (EPC)) is authorized to complete, sign, and send this form to USAC.**

The form must be completed in order to be valid documentation.

Service Certification **must** include:

1.) The Representative/Contact Name, Title, and Phone of Applicant (School/ Library):

- The contact name should match as signatory.
- If the signatory is any other than the Representative/Contact Name identified on the form, please provide the full Name, Title and Phone Number of the signatory and a reason for the mismatch.

2.) Date Goods/Services Delivered: except for installation only invoice, required for all other products/services delivered.

3.) Date Goods/Services were or will be installed. Required only for non-recurring services (products that need installation). This date is required regardless of the party providing the installation.

4.) Date Applicant Portion Paid and Check No., or Date to be Paid: This is required.

5.) If services are not yet delivered, please provide a contract to indicate provision for up-front charges.

6.) Signed and dated: by the authorized Applicant contact.

Note: By signing this Form you are authorizing that:

- Equipment and services requested are approved on the FCC Form 471.
- Unit cost and quantity per location do not exceed the amounts approved on the FCC Form 471.
- All equipment has been delivered/ installed at Recipients of Service (ROS) locations approved on the FCC Form 471 listed on the date provided on document.

Please note: Service Certification forms are Invoice number specific. Due to audit requirements, the re-submittal of an earlier Service Certification form is not acceptable and will result in rejection of the current invoice line(s).

Service Certification – Example Form

Verbiage sent in the EPC outreach window regarding request:

Please see the attached service certification that I am requesting in order to complete an invoice request from your service provider. Please ensure an authorized party review and signs, returning the signed document timely for review. if you have any questions. please contact me.

Thank you for you cooperation and continued support of the Universal Service Program.

Applicant Service Certification for E-Rate Invoices		
1	Invoice Number	«SLD_Invoice_No»
2	Invoice Line Number	«Line_ID»
3	Service Provider Name / Service Provider SPIN	«Service_Provider_Name» «SPIN»
4	Service Provider Invoice #	«SP_App_Invoice_No»
5	Undiscounted Invoice Amount	«Undiscounted_Amt»
6	Discounted Invoice Amount	«Discounted_Amt»
7	Applicant Name	
8	Applicant Authorized Representative / Contact Name & Title	
9	Applicant Authorized Representative / Contact Phone	
10	Billed Entity Number (BEN)	«BEN»
11	471 Number	«FORM_471»
12	FRN	«FRN»
13	Date Goods/Services Delivered	
14	Date Goods/Services Installed	
15	Date Applicant Portion Paid and Check No. or Date will be paid	

By signing below, you, the Applicant certify that:

A. I am authorized to represent the above-named Applicant.

B. The equipment/services described on the attached vendor invoice(s) have been delivered as indicated on row 13 above.

C. For FRNs which include installation, of the equipment/services described on the attached vendor invoice(s), provide the installation date. This is required only for non-recurring services (products that need installation) and paid for with E-Rate funds have as indicated on row 14 above

D. The equipment and services described on the attached Service Provider invoice meets the following criteria: (Copy of detailed vendor invoice must be attached)

- Equipment and services requested are approved on the FCC Form 471
- Unit cost and quantity per location do not exceed the amounts approved on the FCC Form 471
- All equipment has been delivered/ installed at ROS locations approved on the FCC Form 471 listed on the date provided above

Applicant Authorized Representative Name _____

Applicant Authorized Representative Signature _____

Date _____

E-Rate / Revised 10/16/2023

Knowledge check

2. Who can certify an invoice and respond to outreach?



Manual Invoice Review: Outreach

USAC may conduct outreach to request additional information / documentation to make a disbursement decision.

- **Accurate, Completely, and Timely** responses allow the review to occur and payments to be made.
- You have seven calendar days to respond.
- You may request a seven-day extension.
- If you have a large invoice (i.e., 20 bills or more), you may submit a worksheet in lieu of bills.
- Lack of response may result in invoice denial.

Invoice Modification and Denials

- Automated and Manual Invoice reviews can result in:
 - Approval
 - Modification
 - Denial
- Common Reasons for Modification:
 - Removal of ineligible equipment and services
 - Discrepancy in quantity
 - Ineligible Recipients Of Service
 - Services for a future date not yet received

Knowledge check

3. What is the minimum amount of time to retain your records?




Documentation

Ensure adequate documentation is retained for 10 years to:

- Support amounts invoiced to the E-Rate program
- Demonstrate compliance with FCC rules
- Demonstrate that the costs of equipment and services requested for E-Rate support were properly allocated between eligible and ineligible items, locations or recipients of service

Detailed [Document Retention](#) requirements are available on USAC's website.



Available for Public Use

Update June 2022

[E-Rate Program List of Documents to Retain for Audits and to Show Compliance with Program Rules](#)

E-Rate program rules require program participants to retain all documents demonstrating compliance with the rules for at least 10 years after the latter of the last day of the applicable funding year or the service delivery deadline for the funding request. This list provides guidance regarding the types of E-Rate program documents that should be retained by all program participants – school and library applicants, service providers, and consortia – to comply with FCC audit and [document retention](#) requirements. **Not** all documents may apply to every participant and the list is not an exhaustive list. Service providers should also review this list and “Additional Guidance for Service Providers” later in this document to ensure they retain documentation requested during audits and to demonstrate compliance with E-Rate rules.

FCC FORMS & CERTIFICATIONS		
Document	Applicant	Service Provider
FCC Form 470 (Description of Services Requested and Certification Form)	X	
FCC Form 471 (Description of Services Ordered and Certification Form)	X	
FCC Form 498 (Service Provider and Billed Entity Identification Number and General Contact Information Form)	X	X
FCC Form 472 (Billed Entity Applicant Reimbursement (BEAR) Form)	X	
FCC Form 473 (Service Provider Annual Certification (SPAC) Form)		X
FCC Form 474 (Service Provider Invoice (SPI) Form)		X
FCC Form 479 (Certification by Administrative Authority to Billed Entity of Compliance with the Children’s Internet Protection Act Form) consortium members and consortium leaders only	X	
FCC Form 486 (Receipt of Service Confirmation and Children’s Internet Protection Act Certification Form)	X	
FCC Form 500 (Funding Commitment Adjustment Request Form)	X	
Delivery confirmations for forms filed outside of EPC (FY2015 and earlier)	X	X

For forms filed in the [E-Rate Productivity Center \(EPC\)](#), you can print/save a PDF copy of forms, notification letters, and correspondence for your records.

Documentation: Reconciliation Worksheet

Maintain a reconciliation worksheet that includes:

- Service provider bill number
- Billed service/product
- Quantity and per unit cost
- Extended billed amount

Ensure:

- Sum of all the extended bill amounts agrees to the total (undiscounted).
- Amount for equipment or service requested on the BEAR form can be traced to the actual copies of the service provider bills.

Sample Reconciliation Worksheet

Service Provider Bills				
Service Provider Bill	Billed Service/Product	Billed Qty	Billed Per Unit Cost	Billed Extended Cost
INV101	Product A	5	\$ 10.00	\$ 50.00
INV102	Product B	5	\$ 15.00	\$ 75.00
INV103	Product C	5	\$ 20.00	\$ 100.00
INV104	Product D	5	\$ 25.00	\$ 125.00
INV105	Product E	5	\$ 30.00	\$ 150.00
			Total Eligible (undiscounted) Amount for Service on BEAR	\$ 500.00

Locating Key Invoicing Information

Current Invoice Deadline Date and/or Service Delivery Deadline Information

- EPC: The Invoice Deadline Date and Service Delivery Date are included in the Funding Commitment Decision Letter and Revised Funding Commitment Decision Letter .
- Dataset: [E-Rate Request for Discount on Services: FRN Status](#)
 - Column D "form version" field filter should be set to "Current."

Disbursement Data: [E-Rate Invoice Disbursements Data Lookup Tool](#)

General Open Data Information and Training

- [Open Data Video Guides](#) and [Open Data Platform](#)

Key Takeaways

Key Takeaways

- Invoices can be submitted until the Invoice Deadline Date.
- Only a full rights user can certify forms.
- Request a one-time invoice deadline extension, even if you do not anticipate needing one.
- Only invoice for the specific equipment and services at the quantities and rates approved and only for the approved Recipients of Service (ROS) on your FCC Form 471.
- Ensure you have the accurate FCC Form 471, FRN, FCDL/RFCDL, discount rate, approved cost of service, calculations and invoice amount.
- Remove ineligible items (equipment and services not approved on FCC Form 471, for FY and ROS).
- Establish a process to prevent duplicate invoice submission.
- Retain your supporting documentation and bills for all invoices for at least 10 years.
- Respond in a timely manner to all outreaches to expedite your payment.
- Parties have 60 days to appeal decisions to USAC and 60 days from the date of the USAC appeal decision to appeal to the FCC. Waivers should be filed directly with the FCC.

Resources

- [Applicant Invoicing](#)
- [Service Provider Invoicing](#)
- [Open Data](#)
- [Applicant 498ID](#)
- [Webinars & Trainings](#)
- [E-Rate News Brief](#)
- [SPI Invoice Submission Demo](#)
- [BEAR Invoice Submission Demo](#)
- [Glossary of Terms](#)
- [EPC Invoice Process](#)
- [Practice Forms](#)

Questions?

Thank you for taking the time to attend today's 2024 Fall E-Rate Training!

All of today's training participants will receive a survey to share your feedback about today's training. Please let us know your thoughts.

For more information on the E-Rate program, please subscribe to the E-Rate [News Brief](#) or register for one of the [upcoming webinars](#).

