



# **E-Rate Service Provider Webinar**

E-Rate Program Participant Webinar

August 22, 2024

# Disclaimer

- To accommodate all attendees, real-time closed captions will be present during this presentation.
- We apologize in advance for any transcription errors or distractions. Thank you for your support.

# Housekeeping: General

- Audio is available through your computer's speakers.
- The audience will remain on mute.
- Use the **Questions** box to ask questions at any time.
- You can download the slide deck from the **Handouts** section of the webinar panel.



The screenshot displays the GoToWebinar interface. At the top, there is a menu bar with 'File', 'View', and 'Help'. Below it, the 'Audio' section is expanded, showing 'Sound Check' with a green signal indicator and a question mark. Underneath, there are two radio buttons: 'Computer audio' (selected) and 'Phone call'. A red 'MUTED' indicator is visible. Below the microphone selection, there is a dropdown menu for 'Microphone (HD Webcam C510)'. A volume slider is present, and another dropdown menu for 'Speakers (High Definition Aud...' is visible. The 'Handouts: 2' section is expanded, showing two files: '2017-05-05\_11-59-21.png' and 'GTM iOS.jpeg'. The 'Questions' section is expanded, showing a text input field with the placeholder '[Enter a question for staff]'. Below the input field, there is a red button that says 'Ask questions here!' and a 'Send' button. At the bottom, there is a footer with the text 'Multi sessions different registrants', 'Webinar ID: 960-960-603', and the GoToWebinar logo.

**Download PDF of Slides here!**

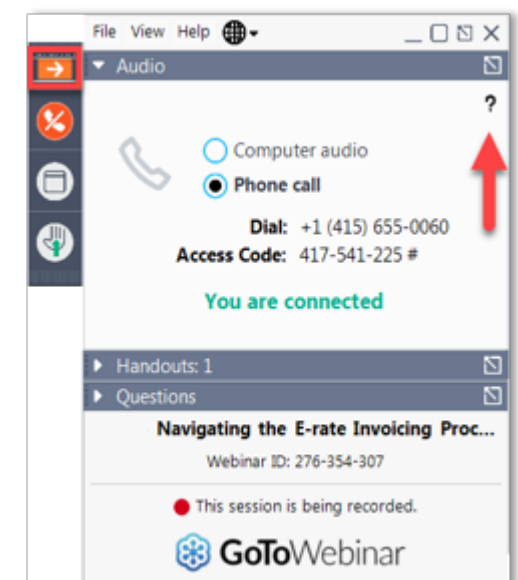
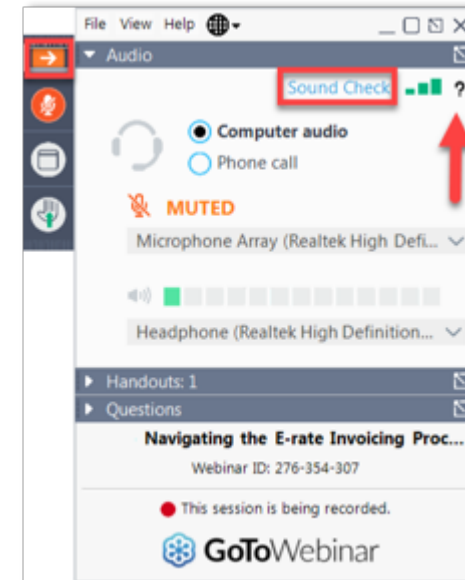
**Ask questions here!**

Multi sessions different registrants  
Webinar ID: 960-960-603

 GoToWebinar

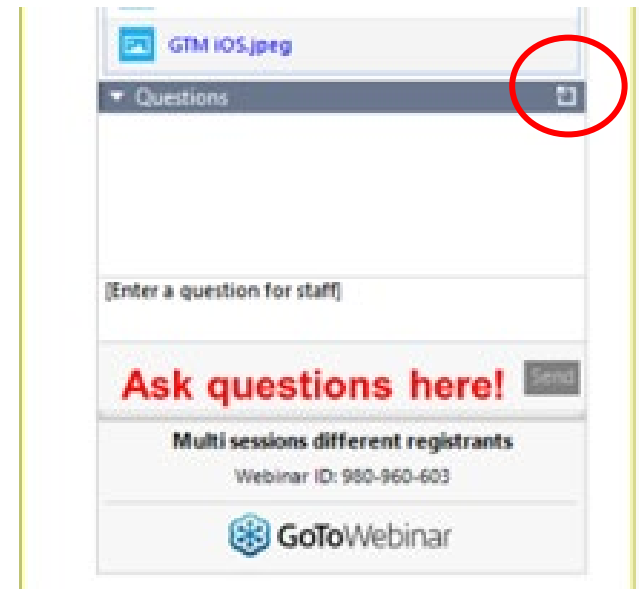
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- Click the **Sound Check** link, then the question mark icon to test your audio.
- If you lose audio or the slides freeze, restart the webinar.
- Check that your computer meets GoToWebinar's system requirements by exiting the webinar and clicking the **Check System Requirements** link in your event confirmation email.
- If issues persist, call (833) 851-8340 to troubleshoot with GoToWebinar.



# Housekeeping: Q&A

- There will be a live Q&A session focused on today's topics.
- Tips for submitting questions:
  - Use the **Questions** box in your webinar control panel anytime during the presentation.
  - Write in full sentences.
  - Ask one question at a time.
  - Ask questions related to today's webinar content.
- To view answers:
  - Click the box with the arrow icon in the top right corner of the **Questions** box to expand it and reveal all written answers.



# E-Rate Customer Service Center (CSC)



**Call us at (888) 203-8100**

Monday – Friday 8 a.m. to 8 p.m. ET

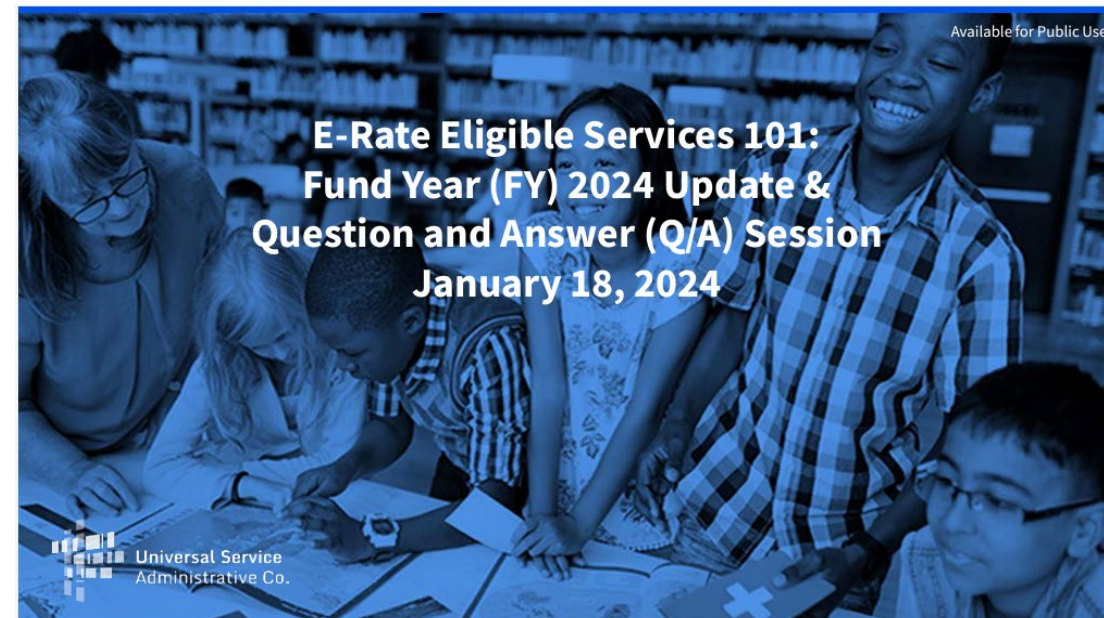


**Create a customer service case**

1. Log in to the [E-Rate Productivity Center \(EPC\)](#)
2. Select the **Contact Us** link from the upper right menu on the landing page.

# Prerequisites

- [FY2024 Eligible Services E-Rate Question & Answer \(Q&A\) Session](#)
  - E-Rate Eligible Entities, Equipment and Services
- [Wi-Fi Hotspot Eligibility Webinar](#)
  - Wi-Fi hotspot eligibility requirements, hotspots funding budgets and caps, and other requirements





# MEET THE TEAM



**Jessie Stern**

Outreach | E-Rate



**Pamela Lloyd**

Invoicing | E-Rate



**Devent Carter**

Post-Commitment | E-Rate



**Shawn Jensen**

Pre-Commitment | E-Rate

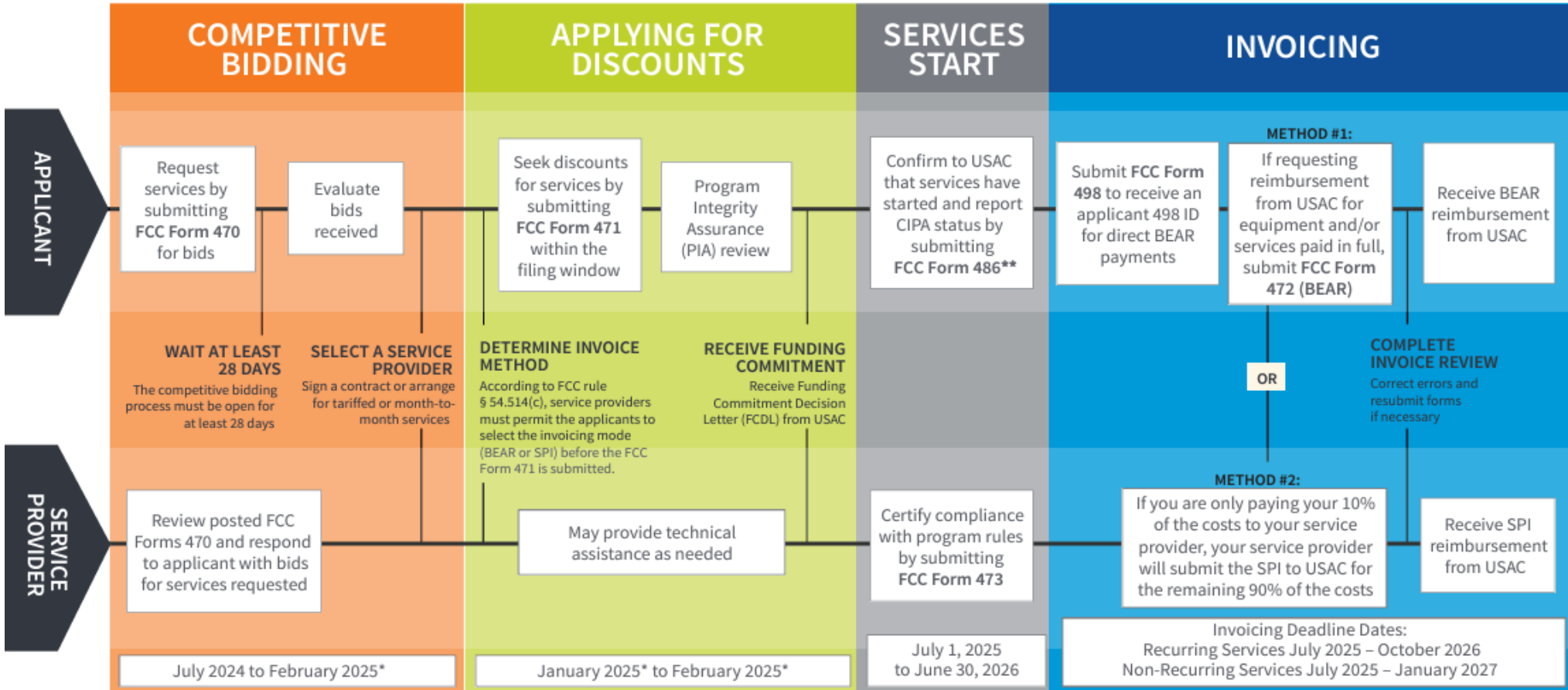


# Agenda

- Understand the E-Rate Program
- Obtain a Service Provider Identification Number
- Working With the Applicant
- Certify Compliance
- Invoice USAC
- Appeal a USAC Decision
- Resources

# Understand the E-Rate Program

# Program Overview



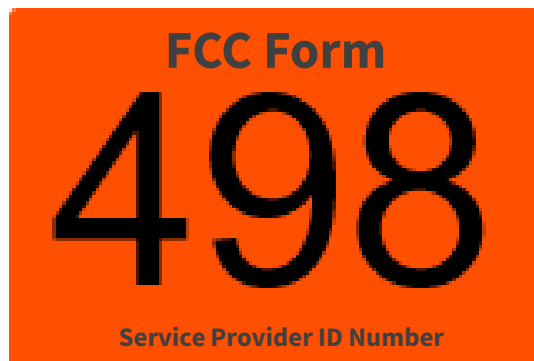
\*Date ranges reflect a typical timeline and are subject to change.

**FOR MORE INFORMATION:**

- Website: The application process is broken down in detail for both applicants and service providers on the Schools and Libraries Program website ([www.usac.org/sl](http://www.usac.org/sl)).
- Glossary of Terms: Definitions for program terms and acronyms.
- \*\*Consortium members report their CIPA status by submitting the FCC Form 479 to their consortium leader. The consortium leader then files the FCC Form 486.
- To adjust funding commitments and/or modify the dates for receipt of services after the FCDL is issued, file the FCC Form 500.

# E-Rate Forms

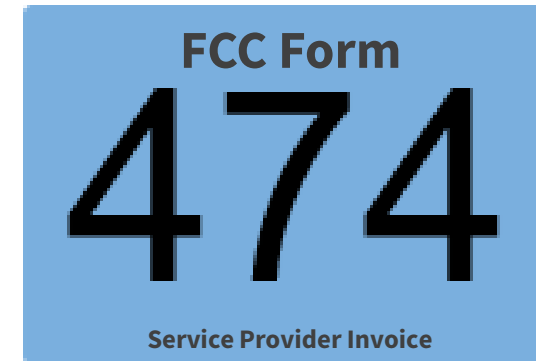
Service  
Provider Forms



**Get a SPIN**

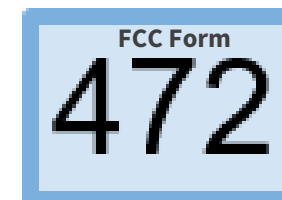
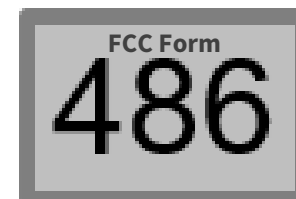
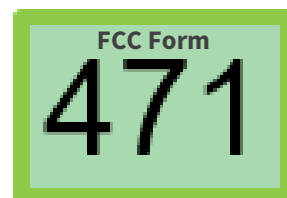
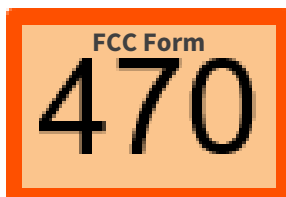


**Certify  
Compliance**



**Invoice USAC**

Applicant Forms



# Know Your Role

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

# **Obtain a Service Provider Identification Number (SPIN)**

# Register Your Entity

- **Register on SAM.gov** to [obtain a Unique Entity Identifier \(UEI\)](#).
- **Register with USAC** to provide services to our applicants by [completing an FCC Form 498](#).
  - This results in the creation of your **SPIN ID/498 ID**.
  - USAC then sets your access to [the E-File System](#).
  - You receive an email letting you know you can create a password in the **E-Rate Productivity Center** (EPC).
- Keep all registration information current.
- View our [Service Provider Get Started Checklist](#) for further assistance.





# Bid on Services

The **applicant** starts the [competitive bidding process](#) by posting an FCC Form 470 and Request for Proposal documents, if applicable, to the USAC website.

- These include specific requirements for service providers to follow during the competitive bidding process.
- Use the [FCC Form 470 Tools](#) within Open Data to view and export requested services details.

**Service providers** [review the information and bid on the requested services](#).

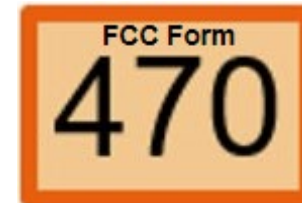
- Submit bids, including all information requested by the applicant, using the method provided in the FCC Form 470 or RFP documents.
  - Can be found typically through an email or online form.
- The bid should include information on E-Rate eligibility percentage and category of service.
- The bid should be responsive to the services being requested.





# How to Find Applicant Requests

- [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.



# How to Find Applicant Requests

## 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 ":" 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.

A screenshot of the FCC Form 470 search interface. At the top, there is a 'Filters' section with a 'Clear All' link and five dropdown menus: 'Funding Year', 'Certified Date/Time', 'Billed Entity State', 'Billed Entity Zip Code', and 'Service Category'. A 'More ▼' button is circled in red on the right side of the filters. Below the filters is a 'Detailed FCC Form 470 Data Report' section. A blue arrow points from the text 'The data will be displayed here' to this section. The data table has columns: 'Application Number', 'Form Nickname', 'Form PDF', 'Service Request ID', 'Service Reque...', 'Request for Proposal Documents', and 'Request for Proposal Upload Date/1'. A vertical ellipsis icon (three dots) is circled in red on the right side of the table header.



The data will be displayed here

# View an FCC Form 470 Tool – Search Results

For more details about publicly available information via our tools, please view the [webinar](#) on Open Data.

Filters (3)  
Clear All

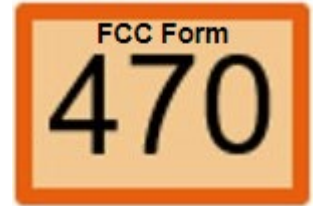
Funding Year: 2024  
Certified Date/Time: Select...  
Billed Entity State: Select...  
Billed Entity Zip Code: Select...  
Service Category: Category 1

Service Type: Select...  
Function: Category One Maintenan...  
Other Function: Select...  
Applicant Type: Select...  
Application Number: Select...

Less ^

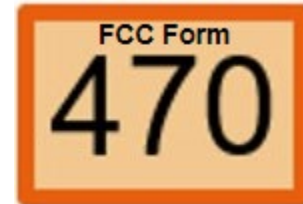
### Detailed FCC Form 470 Data Report

Application Number	Form Nickname	Form PDF	Service Request ID	Service Reque...	Request for Proposal Documents	Request for Proposal Upload Date/1
240025917	24-25 Cat 1	<a href="http://publicdata.usac.org/SL/Pr">http://publicdata.usac.org/SL/Pr</a>	1	0		
240025539	2024 FCC Form	<a href="http://publicdata.usac.org/SL/Pr">http://publicdata.usac.org/SL/Pr</a>	1	0		
240025747	BPHS 2024 Form	<a href="http://publicdata.usac.org/SL/Pr">http://publicdata.usac.org/SL/Pr</a>	1	0		
240025472	Fiber Service	<a href="http://publicdata.usac.org/SL/Pr">http://publicdata.usac.org/SL/Pr</a>	1	0		
240025618	Golden Plains U	<a href="http://publicdata.usac.org/SL/Pr">http://publicdata.usac.org/SL/Pr</a>	3	1	<a href="http://publicdata.usac.org/SL/Pr">http://publicdata.usac.org/SL/Pr</a>	2024 Mar 12 06:03:27 PM
240025566	2024 Form 470	<a href="http://publicdata.usac.org/SL/Pr">http://publicdata.usac.org/SL/Pr</a>	1	0		



# How Applicants Select a Service Provider

- Applicants must wait **at least 28 days** after certifying their FCC Form 470, and then they:
  - [Evaluate the bids received](#) (See [sample evaluation matrix](#))
  - Select a service provider **on or after the 28<sup>th</sup> day**
    - The day the applicant certifies the FCC Form 470 counts as Day 0. For example, if they file and certify an FCC Form 470 on September 1, the waiting period starts on September 2, and they may select a service provider on or after September 29.
- **The price of eligible equipment and services** must be the **primary** selection criterion (weighted more heavily than any other single criterion).



## How Applicants Select a Service Provider (Cont.)

- Applicants must first [enter into an agreement](#) to provide services. They are required to wait at least 28 days. In some cases, the applicant's state or local procurement rules or regulations may require them to wait longer.

Services can start on or after July 1. Be sure that eligible equipment and services are delivered:

- To the right recipient of service
- In the correct quantities and rates
- See the updated [28-Day Waiting Period](#) page for more information.



# Bid Should Include Lowest Corresponding Price

Service providers must charge E-Rate applicants the [Lowest Corresponding Price](#). (See 47 C.F.R. § 54.500). This is the lowest price that a service provider charges to non-residential customers who are **similarly situated** to a particular school, library, or library consortium for **similar services**. This ensures that:

- Service providers do not charge E-Rate applicants more than they would charge their other customers for the same services.
- Any lack of experience in negotiating in a service market does not prevent E-Rate applicants from receiving competitive prices.

Note – document retention rules apply even in the event of a merger or acquisition.

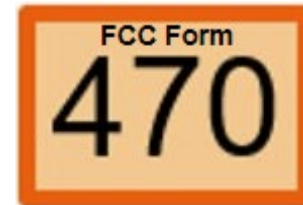




# Open and Fair

The [competitive bidding process](#) must be [open and fair](#).

- “Open” means there are no secrets in the process. Information shared with one bidder must be shared with all. All bidders know what is required of them.
- “Fair” means that all bidders are treated the same and that no bidder has advanced knowledge of the project information.



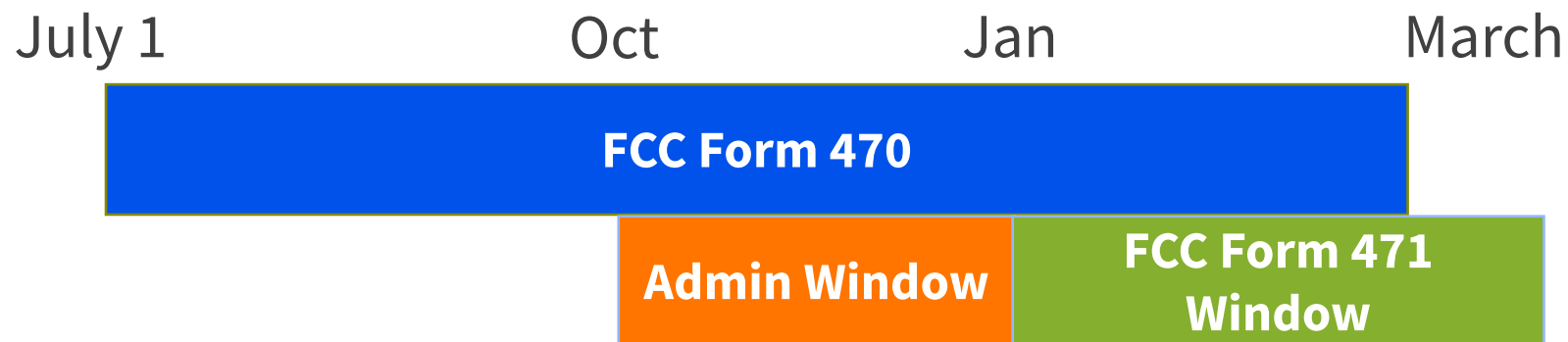
## Open and Fair – Service Providers

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

- **Review all the requirements**, including the FCC Form 470 and RFPs.
- 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.

# What is the Administrative Window?

- A period when applicants can update EPC entity profile information for the FCC Form 471 application
  - Occurs from October to early January prior to the FCC Form 471 application filing window
  - Official dates are announced each year in the E-Rate News Brief
- Service providers should review and validate their Account Administrator and all EPC permissions.
- For more information, watch our [EPC Administrative Window webinar](#).
- Closes as the FCC Form 471 Filing Window opens:



# 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.
  - The Account Administrator is tied to their 498 ID. See [Applicant 498](#) and [Service Provider 498](#) pages on our website.
- Consultants and Service Providers also need to create Consultant and Service Provider Accounts and Account Administrators for their EPC accounts.

# 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

<b>Name</b>	ABC School District	<b>FCC Registration Number</b>	1231231234
<b>Address</b>	123 Street Lawrence, KS 66046	<b>Organization Type</b>	Applicant
<b>Mailing Address</b>	123 Street Lawrence, KS 66046	<b>Phone Number</b>	785-555-5555
		<b>Email</b>	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 ▼

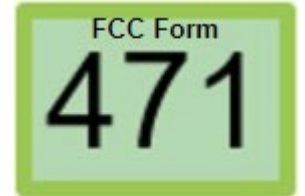
CANCEL SUBMIT

# 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 and consortia.
  - Modify (change) the Account Administrator.
  - Deactivate users who no longer work for the organization

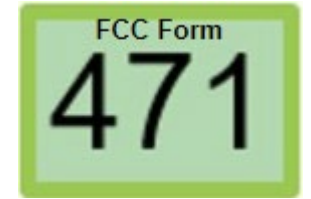
# Working With the Applicant





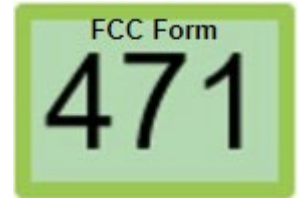
# Understand Equipment and Service Eligibility

- Each year, before the application filing window, the FCC releases the [Eligible Services List](#), which contains general guidance on the equipment and services that are E-Rate eligible for the upcoming funding year.
- The Eligible Services List also provides helpful information such as **eligibility conditions** for each category of service each funding year.
- Applicants can only receive funding for eligible equipment and services that are being used **for [educational purposes](#)**.
- Equipment and services may be **fully, partially** or **conditionally** eligible.
- Eligibility of equipment and services may vary from year to year.
- After you have been selected, it is important to inform the applicant on the eligibility of your equipment and services, as well as to help them to categorize it accurately on their FCC Form 471.
  - If you have any question about eligibility of equipment and services, please [contact us](#).
- Check with the appropriate state agencies to see if your applicant must abide by a [State Master Contract](#).



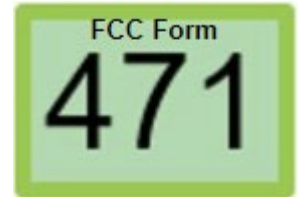
# Notify Applicant of Any ‘Mixed Eligibility’ Issues

- 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 the equipment or service:
  - Contains both eligible and [ineligible components](#) – If it is not 100% eligible, you should include what the percentage is in your bid
  - Is utilized for eligible and ineligible uses – for example, a server that is used for both caching (eligible) and video distribution (ineligible)
  - Is delivered to both eligible and [ineligible entities](#) – for example, broadband service delivered to a school run by a church (eligible) AND 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.



# Allocate Costs for Mixed Eligibility

- E-Rate funds may **only** be used to pay for **eligible equipment and services** used by eligible entities for eligible purposes (i.e., primarily educational purposes).
- If the equipment or service has both eligible and ineligible **functions**, the cost of the ineligible functions must be allocated out of the funding request.
- A cost allocation requires a clear delineation of costs.
- Cost allocations must be supported by documentation.
- The cost allocation must be based on a reasonable, tangible basis that reaches a realistic result.
- Reminder: Applicants are required to allocate services with ineligible sites or ineligible recipients of service.



## Follow E-Rate Gift Rules

- Receipt or solicitation of gifts by applicants from service providers or potential service providers (and vice versa) is a **competitive bidding violation**.
- Service providers may not offer or provide any gifts or things of value to applicant personnel involved in E-Rate.
- Gift prohibitions are **always** applicable – not just during the competitive bidding process.
- FCC rules and any applicable state or local rules must be followed.

# Retain Documentation

- Applicants and service providers must [retain all documentation](#) for at least 10 years from the last date of service.
  - For example, for **recurring internet access service** for FY2024, both the applicant and the service provider must retain all records until at least June 30, 2035.
- 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.
- Records can be kept electronically.



# Certify Compliance

# File Service Provider Annual Certification (SPAC)

- Service providers file an FCC Form 473 (Service Provider Annual Certification (SPAC) Form) to certify that they will comply with Schools and Libraries (E-Rate) program rules and guidelines.
- A new FCC Form 473 must be on file for each funding year they participate in the E-Rate program.
- FCC Forms 473 are filed in the E-Rate Productivity Center (EPC). Only full-rights users can certify an FCC Form 473.
- An FCC Form 473 is required for each Service Provider Identification Number (SPIN)/498 ID **every funding year** they participate in the E-Rate program
- The FCC Form 473 must be on file with USAC **before USAC pays an invoice.**
- Use the **EPC service provider record** to review Funding Years where the FCC Form 473 has been completed.
- View the Service Provider Course 1 e-Learning Module; see module 2 for information on the FCC Form 473/SPAC form.

# Invoice USAC



# Invoicing Prerequisites

- The applicant and service provider must have **received a [Funding Commitment Decision Letter \(FCDL\)](#)** with a positive commitment.
- The applicant must have **certified an FCC Form 486** and established the actual service start date for their Funding Request Number(s) (FRN(s)).
  - USAC must have reviewed and approved the FCC Form 486 (See [FRN Status Tool](#)).
- The service provider must have **certified an FCC Form 473** in EPC for each SPIN that will be featured on an invoice for that funding year (See [FRN Status Tool](#)).
- The service provider must have started the installation/delivery of funded equipment and services.
- The invoice must be filed before the Invoice Deadline Date.
- 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 Recipients of Service (ROS).
- Invoiced amount must be for actual charges up to the amount committed through the E-Rate program. Billed rates must not exceed the contracted rates. USAC will only pay up to the contracted rate.

## Invoicing Prerequisites (Cont.)

- Discuss who will be filing invoices and the difference between **BEAR/SPI** methods with the applicant.
  - Billed Entity Applicant Reimbursement (BEAR) invoicing: Applicant invoices USAC.
  - Service Provider (SPI) invoicing: Service provider invoices USAC.
- This decision is made on a per-FRN basis and is the **applicant's choice**.
- Once USAC processes an invoice for an FRN, the [invoicing method](#), or "mode" (BEAR or SPI), is set and cannot be changed without formal approval.
- Make sure that you have the **most recent commitment information** from either the FCDL or the [Revised Funding Commitment Letter](#) (in case of post-commitment changes) including discount rate, approved cost of service, FCC Form 471 number, FRN, any service substitutions, etc.

# Billed Entity Applicant Reimbursement Invoicing

- Determine the invoicing frequency (monthly, bimonthly, quarterly, one-time).
- **Applicant pays the service provider in full.**
- Applicant bills USAC for the approved equipment and services delivered to the approved Recipient(s) of Service at the quantities and rates not to exceed what was listed on the FCC Form 471.

# Service Provider Invoicing

- **Service provider bills the applicant** for any costs for **ineligible** portions/services and **non-discounted share** before submitting the FCC Form 474.
- Applicant pays the service provider for **ineligible** portions/services and **non-discount share**.
- Service provider invoices USAC for the discount amount using the FCC Form 474.
- Service Providers file the FCC Form 474 in EPC. Only full rights users can certify an FCC Form 474.
  - A full-rights user can complete the entire process of submitting and certifying an invoice. A partial rights user can submit an invoice for certification by a full-rights user. These rights are assigned by the Account Administrator.
- Invoiced amount must be actual charges – not the amount **committed** on the Funding Commitment Decision Letter.
- Only include [eligible services](#) on service provider invoices.
- Only bill USAC for the approved equipment and services delivered to the approved recipient(s) of service at quantities and rates not to exceed what was approved on the FCC Form 471.

# Applicants Must Pay Their Non-Discount Share

Regardless of which invoice method has been selected, **all** E-Rate applicants must pay their non-discount share.

- Service providers cannot pay (directly or indirectly) for the applicant's non-discount share.
- Funds cannot come from the service provider or an entity controlled by the service provider.
- Service provider bills cannot be ignored or waived.
- If the applicant cannot show proof of payment during invoice review, the invoice (whether from the applicant or the service provider) may be denied.

# Invoicing Reminders and Key Takeaways

- Ensure the applicant's **FCC Form 471 is accurate**, including FRN, discount rate, approved cost of service, calculations, and invoice amount.
- **Remove ineligible items** (equipment and services not approved on FCC Form 471 for that funding year and recipient of service).
- Respond to all outreach **completely and in a timely manner** to expedite your payment.
- To **prevent duplicate invoice submission**, establish a process to track/identify each invoice.
- Retain your [supporting documentation](#) and bills for all invoices for at least **10 years**.
- Make sure all equipment purchased is **installed and in use before the [service delivery](#) deadline**.
- Invoices may be submitted until the **[invoice filing deadline](#)** (generally October 28 for recurring services and January 28 for non-recurring services).
  - You may request a **one-time invoice deadline extension** (before the current deadline). See the [E-Rate FRN Invoice Deadline Tool](#) within Open Data.
- **[Appeals](#)** must be submitted to USAC within **60 days** of the date when USAC issued the decision.
- To seek a waiver of FCC Rules, appeal directly to the FCC.

# Invoicing Reminders and Key Takeaways (Cont.)

- **BEAR Invoices:** Applicant must have paid the service provider **in full before invoicing E-Rate.**
- **SPI Invoices:** Applicant must pay the service provider their **non-discounted portion.** Service providers should **bill** their customers for:
  - The **non-discounted** portion of costs for the approved eligible equipment/services, and
  - Any costs for the **ineligible** portions of equipment and services before submitting the FCC Form 474.
- Ensure your applicant files **for Basic Maintenance of Internal Connections (BMIC) services correctly.** Mistakes are often identified during invoicing. See our [FAQs](#) on how to fix misclassified equipment and services on your FCC Form 471.
- **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.**
- Ensure the speed is properly listed under the approved FRN. If you're using a flexible bandwidth speed, ensure you are using the min/max field on the FCC Form 471.
- Invoiced amount must be **actual charges** – not the amount committed through the E-Rate program.
- Check your manual calculations (e.g., your **prorated amounts must be accurate**).
- Billed rates must **not exceed the contracted rate.** USAC will only pay up to the contracted rate.

# Tips for Success

- Follow all competitive bidding guidelines.
- Enter into a [legally binding agreement](#) before the applicant files FCC Form 471.
- Comply with the Lowest Corresponding Price (LCP) rule.
- Deliver equipment and services to the appropriate recipients of service.
- Ensure that the applicant has the necessary resources to use the service provided.
- Validate that internal connections are installed.
- Invoice for the correct amount.

For more information, see the [Common Audit Findings Page](#) on USAC's website.



# Appeal a USAC Decision

## When to File an Appeal

- If you disagree with a USAC decision, you have 60 days from the date of that decision to request a **review of the decision**. This request is called an [appeal](#).
  - File your appeal in the E-Rate Productivity Center (EPC).
  - To appeal a decision from funding year 2015 or prior, create a customer service case in EPC, or you may submit an appeal directly to [Appeals@usac.org](mailto:Appeals@usac.org).

# Include Pertinent Information in Your Appeal

- Applicant's billed entity number (BEN) or Service Provider's SPIN
- Contact information including name, address, telephone number, and email address of the person who can discuss the appeal with USAC in detail
- Nickname for the appeal (to help you identify the appeal)
- Funding year of the decision being appealed
- Funding Request Numbers associated with the appeal

## Include Pertinent Information in Your Appeal (cont.)

- A narrative that explains precisely the USAC decision(s) being appealed and what specific relief is being sought.
- Documentation of USAC's decision (e.g., a copy of USAC's decision letter).
- Supporting documentation such as forms and previous correspondence.
- If USAC requests additional information, please respond promptly. If you fail to submit missing information to USAC within the time prescribed, USAC will review the appeal with the information available, which may result in the denial of the appeal.

# Granting Appeals

- USAC grants appeals under the following limited circumstances:
  - When the appeal makes clear that USAC made an error in its initial review (for example, the PIA reviewer made an error).
  - You provide USAC with new information and/or documentation it did not provide when the original request was made.
  - When USAC receives a policy clarification, or a new policy impacts the original decision.
- If you are seeking a waiver of an FCC rule, you must file a waiver directly with the FCC.
  - For example, requests to consider FCC Forms 471 filed after the window closed must be directed to the FCC as a window waiver request.

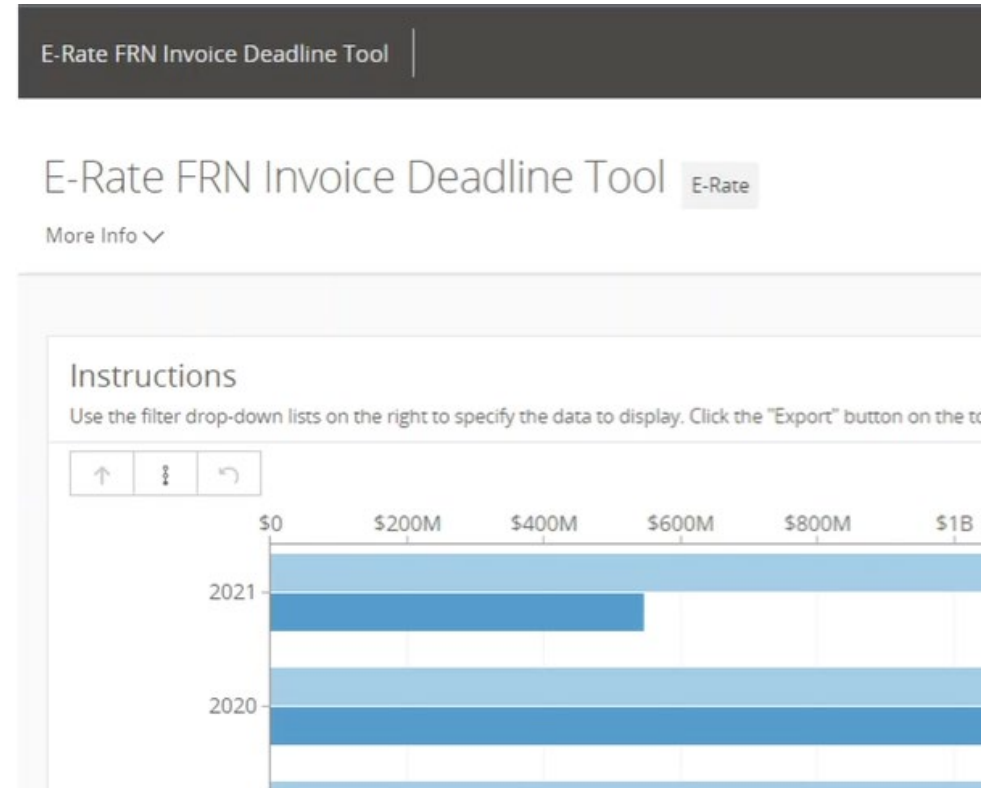
# You Will Be Notified of Your Appeal Status

- After filing an appeal, USAC issues an **Appeal Confirmation Letter**.
- If an appeal reviewer has questions or requires additional information, they will reach out through the E-Rate Productivity Center (EPC).
- USAC issues its appeal decision in a [Revised Funding Commitment Decision Letter \(RFCDL\)](#).
- If USAC denies the appeal, you may file an appeal with the FCC.

# Resources

# E-Rate FRN Invoicing Deadline Tool

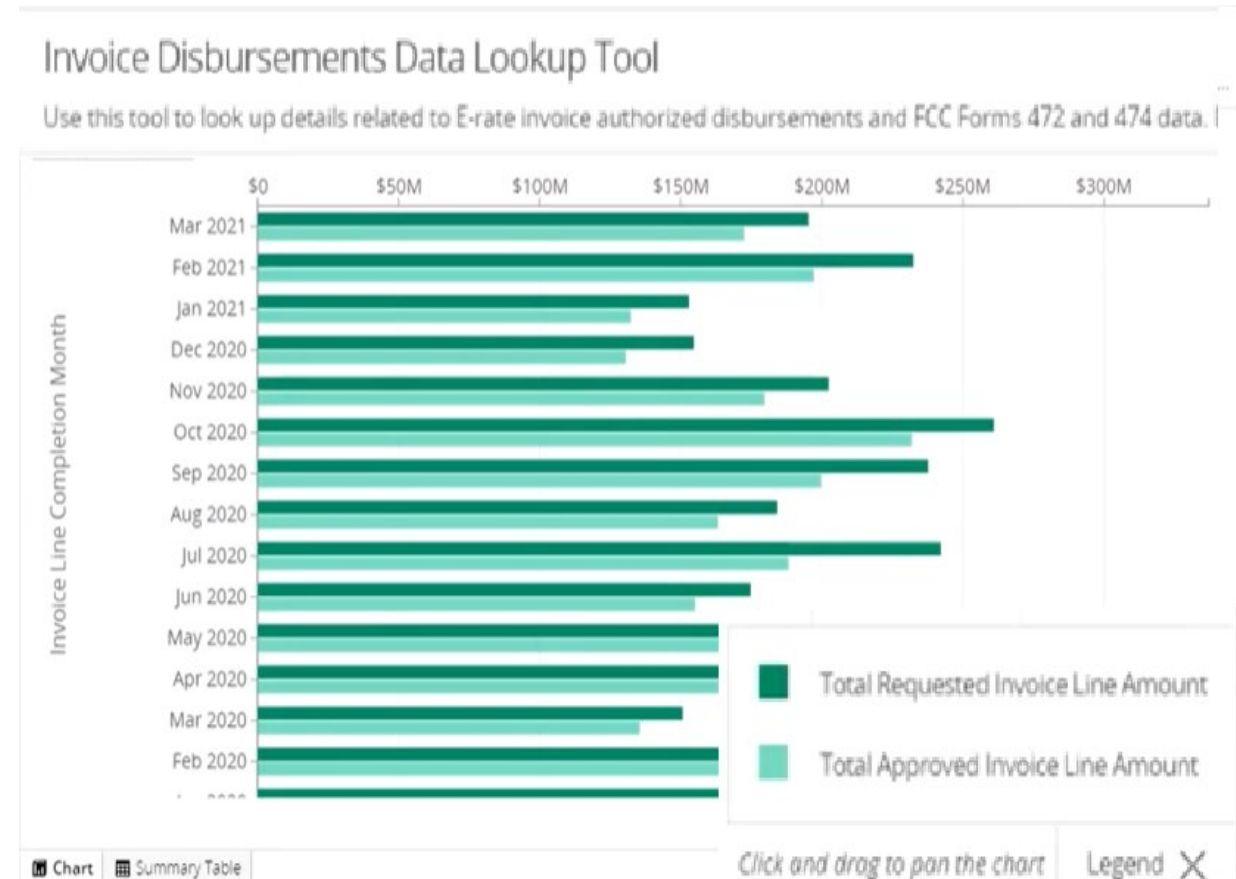
- Use the [E-Rate FRN Invoicing Deadline Tool](#) to search Funding Request Number data.
  - Invoice deadline dates
  - Which invoices are ready for invoicing
  - Funds remaining for invoicing
  - Invoicing Mode





# E-Rate Invoice Disbursements Data Lookup Tool


- Use the [E-Rate Invoice Disbursements Data Lookup Tool](#) to find information on invoice line items.
  - Find out which submitted invoice lines are completed.
  - See how much funding was approved per line.
  - Learn why an invoice line was reduced or paid at zero.



# EPC Invoicing for Service Providers

- [EPC Invoicing for Service Providers Videos](#)
  - SP Course 1: Submitting and Certifying Invoices in EPC
  - SP Course 2: Invoice Management and Status in EPC (including FCC Form 473/SPAC)
  - SP Course 3: Invoice Notifications and Outreach in EPC
  - SP Course 4: Submitting and Certifying ESPI in EPC
  - E-Rate Invoicing Open Data Set and Tool Demo

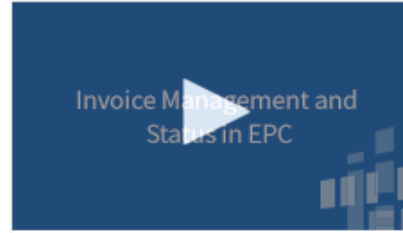
## EPC Invoicing for Service Providers



Submitting and Certifying Invoices in EPC

SP Course 1: Submitting and Certifying Invoices in EPC

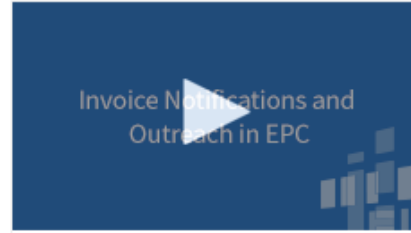
50:00 minutes



Invoice Management and Status in EPC

SP Course 2: Invoice Management and Status in EPC

50:00 minutes



Invoice Notifications and Outreach in EPC

SP Course 3: Invoice Notifications and Outreach in EPC

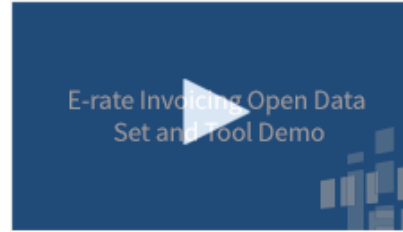
50:00 minutes



Submitting and Certifying ESPI in EPC

SP Course 4: Submitting and Certifying ESPI in EPC

50:00 minutes



E-rate Invoicing Open Data Set and Tool Demo

E-Rate Invoicing Open Data Set and Tool Demo

25:46 minutes

# Resources

- [E-Rate Service Provider Webpage](#)
- [USAC Service Provider \(Contributor\) Webpage](#)
- [Open Data's E-Rate Datasets](#)
- [E-Rate News Brief](#)
- [E-Rate Learn Page](#)
- E-Rate Video: [How to Search for FCC Forms 470](#)
- [Appeal a USAC decision](#)



# Live Q&A

- Submit your questions about today's topics:
  - FCC Form 471 Review Process
  - Preparing for a PIA Review
  - PIA Inquiries
  - Selective Review
  - Funding Commitment Decision Letters

The screenshot shows a GoToWebinar control panel. At the top, there's a menu with 'File', 'View', and 'Help'. Below that is the 'Audio' section with a 'Sound Check' indicator. The audio settings are set to 'Computer audio' and are currently 'MUTED'. The microphone is identified as 'Microphone Array (Realtek High Defi...)' and the headphones as 'Headphone (Realtek High Definition...'. Below the audio section is a 'Handouts: 1' section with a file named 'Invoicing Webinar Slides.pptx'. The 'Questions' section is highlighted with a red arrow, and below it is a text input field with the placeholder 'ENTER YOUR QUESTION HERE' and a 'Send' button. The bottom of the screen shows the webinar title 'Navigating the E-rate Invoicing Proc...', the ID 'Webinar ID: 276-354-307', a recording indicator, and the GoToWebinar logo.

## Q&A Tips

- ✓ Type your queries into the “Questions” box in your webinar control panel.
- ✓ Write in full sentences.
- ✓ Ask one question at a time.
- ✓ Click the box with the arrow above the questions box to expand it and see all the written answers.

**Questions?**

# E-Rate Customer Service Center (CSC)



**Call us at (888) 203-8100**

Monday – Friday 8 a.m. to 8 p.m. ET



**Create a customer service case in the E-Rate Productivity Center (EPC):**

1. Log in to EPC.
2. Select the **Contact Us** link from the upper right menu on the landing page.

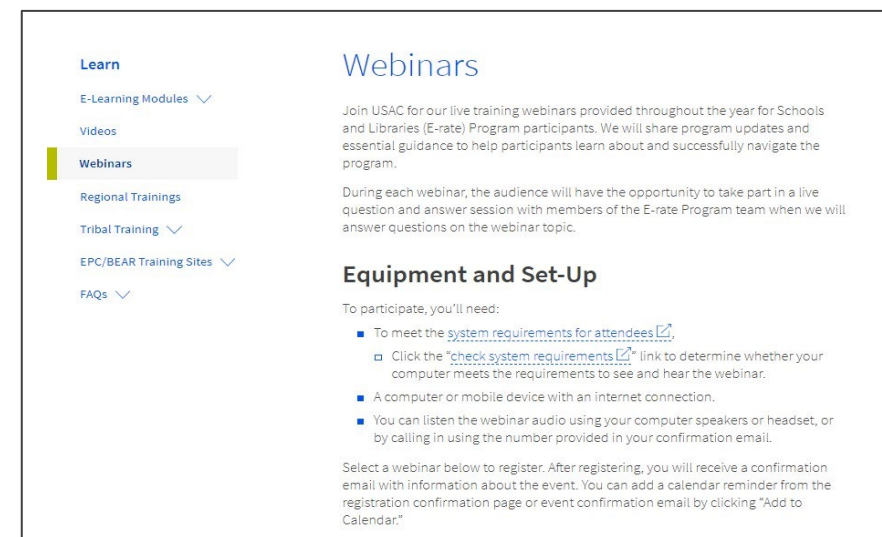
# UPCOMING WEBINARS

**Our next webinar is on:  
8/27/24 at 2 p.m. ET**

## Open Data Overview Webinars

**Recommended for:** Applicants  
and service providers

**E-Rate Experience Level:** All



The screenshot shows a navigation menu on the left with the following items: Learn, E-Learning Modules (with a dropdown arrow), Videos, Webinars (highlighted with a yellow bar), Regional Trainings, Tribal Training (with a dropdown arrow), EPC/BEAR Training Sites (with a dropdown arrow), and FAQs (with a dropdown arrow). The main content area is titled "Webinars" and contains the following text:

Join USAC for our live training webinars provided throughout the year for Schools and Libraries (E-rate) Program participants. We will share program updates and essential guidance to help participants learn about and successfully navigate the program.

During each webinar, the audience will have the opportunity to take part in a live question and answer session with members of the E-rate Program team when we will answer questions on the webinar topic.

**Equipment and Set-Up**

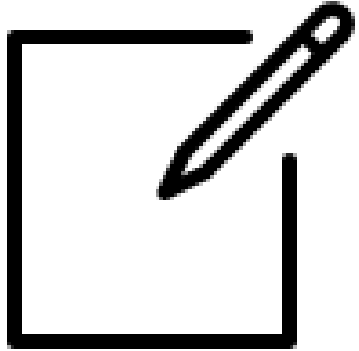
To participate, you'll need:

- To meet the [system requirements for attendees](#).
- Click the "[check system requirements](#)" link to determine whether your computer meets the requirements to see and hear the webinar.
- A computer or mobile device with an internet connection.
- You can listen the webinar audio using your computer speakers or headset, or by calling in using the number provided in your confirmation email.

Select a webinar below to register. After registering, you will receive a confirmation email with information about the event. You can add a calendar reminder from the registration confirmation page or event confirmation email by clicking "Add to Calendar."

Go to the E-Rate [Webinars](#) page for additional information.

# Take Our Survey



- We want to hear about your webinar experience.
- A survey will appear on your screen at the end of the webinar.
- If you are not able to complete the survey today, one will be emailed to you within one to two business days.
- We appreciate your feedback!



**Thank You!**





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Administrative Co.**