

South Dakota E-rate Training Webinar

New Form 470



Presented by Debra Kriete, Esq.
South Dakota E-rate Coordinator
for the South Dakota Department of Education
November 18, 2015

Forms Process Re-Engineering – EPC Portal

- Beginning NOW, all entities applying for E-rate (or included on a consortium application) must set up an E-rate EPC Portal
- Each Billed Entity will have an Account Administrator who must set up the entity's account.
 - The AA will then assign other users, designate consultants, enter enrollment/NSLP data, join consortia, etc
- If you haven't yet set up your EPC account, do it now
 - FY 2016 Form 470 MUST be filed in EPC
 - See attached instructions for how to set up your EPC account

Purpose of Form 470

- Online form to notify vendors of services and equipment you may request funding for, for the service period beginning July 1, 2016
- Vendors are invited to submit bids/price quotes for 28 days from the date of certifying your Form 470
- E-rate requires you to plan ahead and anticipate your needs well in advance
- You are NOT obliged to purchase any service/equipment listed on Form 470, but if you might want to apply, then list the service/equipment on Form 470

Services/Equipment to List on Form 470

- Consult Eligible Services List for all eligible items
- In general:
 - Any Category 1 service (voice, data circuits, Internet) that is not subject to an E-rate qualified multi-year contract must be listed – known as Month to Month service
 - All Category 2 equipment and services must be listed – if not subject to an E-rate qualified multi-year contract

New Form 470 Format

- Similar to look and feel of FY 2015 Form 471
- Most items are now selected from drop down boxes
 - Now called “Service Requests” – parallel language to 471 “Funding Requests”
- Narrative text boxes
 - Provide option to describe additional detail
 - Describe local bidding instructions

How Many Form 470s to file?

- All service requests may be included on one Form 470
 - Category 1 and Category 2 service requests may be included on same Form 470 (unlike Form 471 which requires separate C1 and C2 applications)
 - It may be easier for your own record keeping to file C1 and C2 on separate Form 470 applications
- Category 1 service requests are grouped together
- Category 2 service requests have 3 subgroups
 - Post in ALL three service subgroups
 - Internal Connections, Managed Internal Broadband Services, Maintenance

Requests for Proposals

- E-rate definition of RFP – any supplemental information to describe your Form 470 service requests
- NOT required by E-rate or South Dakota state law
- Optional – may be used to provide additional details
 - Must prepare RFP prior to starting Form 470
 - RFP must be uploaded to E-rate portal as part of Form 470

Considerations for Local Bidding Instructions

- Who should vendors contact with questions?
 - Phone, email or fax?
- Should vendors mail, email or fax proposals?
- Reasons for disqualification
 - Vendors fail to show they are authorized to do business in state
 - Vendors fail to confirm they have a physical office in state
 - Vendors fail to provide E-rate SPIN in bid quote

Let's Look at the New Form 470 Online

- From your EPC Portal – select “Apply Now”

My Landing Page



Welcome to the new EPC system, more functionality will be rolling out soon!

[Apply Now](#) | [Manage Users](#) | [Manage Organizations](#) | [Contact Us](#) | [Help](#)

Note: You can't modify anything on this page.

FCC Form 470 - Funding Year 2016

School District 4 - Wireless Upgrade Newville Elem - Form #160000064

Last Saved: 11/5/2015 7:34 PM EST

Basic Information

Service Requests

Technical Contact
Information

Procurement
Information

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Where applicable, we've completed this section of the form based on information from your applicant entity's profile. If any of the non-editable information is incorrect, or you wish to change the information, please update your profile first by going to your entity record, and clicking Manage Organization from the Related Actions menu. If you do not have access to Manage Organization, please contact your applicant entity's account administrator or create a customer service case to request updates to your applicant entity's profile.

Application Type and Recipients of Service

Applicant Type: School District

Number of Eligible Entities: 3

Recipient(s) of Service

- Public
- Private
- Charter
- ESA

Recipients of Service

Billed Entity Name	Billed Entity Number
School District 4	108

Back

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Summary
News

Related Actions >

- Customer Service Cases
- Related Entities
- Consulting Firms
- Consortia Organizations
- FCC Forms 470

FCC Form 470 - Funding Year 2016

QUAKER VALLEY SCHOOL DISTRICT - Quaker Valley SD Internet Access Service FY 16 - Form #160001784

Last Saved: 10/12/2015 6:52 PM EDT

Basic Information

Service Requests

Technical Contact
Information

Procurement
Information

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Certifications &
Signature

Next, you will identify the category(s) of service requested.

Category(s) of Service

What are the category(s) of service that you are requesting? *

Category 1

- Internet Access and/or Telecommunications

Category 2

- Basic Maintenance of Internal Connections
- Internal Connections
- Managed Internal Broadband Services

Back

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You can select either Category 1, Category 2 or both Categories on a Form 470.



Summary

News

Related Actions ▾

Customer Service Cases

Related Entities

Consulting Firms

Consortia Organizations

FCC Forms 470

FCC Form 470 - Funding Year 2016

QUAKER VALLEY SCHOOL DISTRICT - Quaker Valley SD Internet Access Service FY 16 - Form #160001784

Last Saved: 10/12/2015 6:54 PM EDT

Basic Information

Service Requests

Technical Contact
Information

Procurement
Information

FCC Form 470 Review

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If you are using RFPs for any of the requested services, start by uploading them all first.

RFPs for Service Requests

Is there a RFP for any of the services you are requesting? *

Yes

No

New this year: You must indicate whether you have a RFP and upload it if you have one as part of the Form 470. The RFP must be uploaded now before you can continue with the rest of the Form 470.

Back

Discard Form

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Summary

News

Related Actions ▶

Customer Service Cases

Related Entities

Consulting Firms

Consortia Organizations

FCC Forms 470

FCC Form 470 - Funding Year 2016

QUAKER VALLEY SCHOOL DISTRICT - Quaker Valley SD Internet Access Service FY 16 - Form #160001784

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Basic Information

Service Requests

Technical Contact
Information

Procurement
Information

FCC Form 470 Review

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Signature

Next, you will describe the services you are requesting.

Service Requests: Category One

There are currently no Category One service requests. Please enter the service requests below by selecting 'Add New Service Request'.

Add New Service Request

Edit Service Request

Remove Service Request

Narrative

If you would like to provide further detail about the services sought, you may do so in this box below. Examples of such further detail include specific additional capacity levels that you are seeking, additional descriptions of the services bidders should be aware of or any disqualification factors.

Back

Discard Form

Save & Share

Save & Continue



Summary

News

Related Actions ▶

Customer Service Cases

Related Entities

Consulting Firms

Consortia Organizations

FCC Forms 470

FCC Form 470 - Funding Year 2016

QUAKER VALLEY SCHOOL DISTRICT - Quaker Valley SD Internet Access Service FY 16 - Form #160001784

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Basic Information

Service Requests

Technical Contact
Information

Procurement
Information

FCC Form 470 Review

Certifications &
Signature

Next, you will describe the services you are requesting.

Add New Service Request

Function *

Please select a value ▼

- Please select a value
- Transport Only - No ISP Service Included
- Cellular Data Plan/Air Card Service
- Cellular Voice
- Dark Fiber
- Internet Access & Transport Bundled
- Internet Access: ISP Service Only
- Lit Fiber Service
- Other
- Self-provisioning
- Voice Service (Analog, Digital, Interconnected VOIP, etc)

Add



Summary

News

Related Actions >

Customer Service Cases

Related Entities

Once you select your type of service, the form will use "progressive disclosure" to seek additional information about the request. If the drop down boxes don't provide you with the specific option you need, add this information to the narrative description. For example, if you want to request proposals for 3 Mbps but that is not option in the drop down box, you would add this information in the narrative box.

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QUAKER VALLEY SCHOOL DISTRICT - Quaker Valley SD Internet Access Service FY 16 - Form #160001784

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Basic Information

Service Requests

Technical Contact Information

Procurement Information

FCC Form 470 Review

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Next, you will describe the services you are requesting.

Add New Service Request

Function *

Internet Access & Transport Bundled

Number of entities served? *

Quantity *

Are you also seeking Installation, Activation and Initial Configuration for this service? *

Yes

No

Unit

Circuits

Are you also seeking Maintenance and Technical Support for this service? *

Yes

No

Minimum Capacity *

Please select a value

Maximum Capacity *

Please select a value

Cancel

Add

Summary

News

Related Actions >

Customer Service Cases

Related Entities

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Last Saved: 10/12/2015 6:58 PM EDT

Basic Information

Service Requests

Technical Contact Information

Procurement Information

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Next, you will describe the services you are requesting.

Service Requests: Category One

Please enter the service requests below by selecting 'Add New Service Request'.

<input type="checkbox"/>	Service Type	Function	Minimum Capacity	Maximum Capacity	Entities	Quantity	Unit	Installation and Initial Configuration?	Maintenance and Technical Support?	Assoc RFPs
<input type="checkbox"/>	Internet Access and/or Telecommunications	Internet Access and Transport Bundled	5 Mbps	1 Gbps	1	1	Circuits	Yes	Yes	

Add New Service Request

Edit Service Request

Remove Service Request

Narrative

If you would like to provide further detail about the services sought, you may do so in this box below. Examples of such further detail include specific additional capacity levels that you are seeking, additional descriptions of the services bidders should be aware of or any disqualification factors.

Internet access connection to District hub site which is located at District middle school

If you are seeking bids for additional capacity tiers between the minimum and maximum, you must state which additional values.

This is what a completed service request looks like. You can then either select "Add New Service Request" or "Edit Service Request" or "Remove Service Request." If you are done, then proceed to the bottom of the screen below as shown in the next screen shot.

Installment Payment Plan

Are you seeking an installment payment plan for the non-discounted portion of any special construction charges associated with the request(s) listed above? *

- Yes
 No

Back

Discard Form

New for FY 2016: The installment plan option allows you to pay for the non-discount share of any one-time special construction charges over 4 years if the vendor is willing to accommodate your request.

If you're not sure of whether you want an installment plan, select "Yes" and then indicate your uncertainty in the narrative text box. Keep in mind there is no mandate for vendors to offer an installment plan.



Summary
News

Related Actions >

Customer Service Cases
Related Entities
Consulting Firms
Consortia Organizations
FCC Forms 470

QUAKER VALLEY SCHOOL DISTRICT - Quaker Valley SD Internet Access Service FY 16 - Form #160001784

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Basic Information

Service Requests

Technical Contact Information

Procurement Information

FCC Form 470 Review

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Next, please name the person on your staff or project who can provide additional technical details or answer specific questions from service providers about the services you are seeking.

Technical Contact Person

Is there a person who can provide additional technical details or specific questions from service providers about the services you seeking?

Yes ✓

No

How would you like to enter the technical contact details? *

Search EPC System

Enter Details Manually

Back

Discard Form

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Optional to include a technical contact person. Note that the person does not have to be an EPC user to be listed here. Info can be entered manually if the person is not registered as an EPC user.

QUAKER VALLEY SCHOOL DISTRICT - Quaker Valley SD Internet Access Service FY 16 - Form #160001784

Last Saved: 10/12/2015 6:59 PM EDT

Basic Information

Service Requests

Technical Contact
Information

Procurement
Information

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Signature

Next, you will enter all information regarding state and local procurement rules.

State or Local Procurement Requirements

Are there state or local procurement/competitive bidding requirements that apply to the procurement of services sought?

Yes ✓

No

If applicable, provide a description of state or local procurement rules and/or restrictions on how or when service providers may contact you or on other bidding procedures.

Proposals are required to be submitted via email by 4 PM on the Allowable Contract Date which is the 29th day after the posting of this Form 470. Day 1 is the date of the Form 470 posting. The proposal must be emailed to and received by [insert email address]. All questions concerning this Form 470 are required to be sent via email to [insert email address.] Vendors are required to have a physical office located at least [insert # miles] from [insert county name].

Back

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If you selected Yes for State or Local Procurement Requirements, list them here. For example:
How should bids be submitted? Email, paper mail or fax?
How should vendors contact you with questions? Email or phone call? Whose contact information?

Summary

News

Related Actions ▶

Customer Service Cases

Related Entities

Consulting Firms

Consortia Organizations

FCC Forms 470

QUAKER VALLEY SCHOOL DISTRICT - Quaker Valley SD Internet Access Service FY 16 - Form #160001784

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Basic Information

Service Requests

Technical Contact
Information

Procurement
Information

FCC Form 470 Review

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Signature

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Refresh

You have to click the *Refresh* button periodically to see whether the draft Form 470 PDF document has been created and is available for download.

QUAKER VALLEY SCHOOL DISTRICT - Quaker Valley SD Internet Access Service FY 16 - Form #160001784

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Basic Information

Service Requests

Technical Contact
Information

Procurement
Information

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Signature

Please download and carefully review this FCC Form 470 before certifying.

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By checking this box, I certify that the information in the PDF document above is correct.

Back

Send for Certification

Continue to Certification

3 Step Process for Submitting and Certifying Form 470:

Step 1 - Download and review Form 470, and make any corrections.

Step 2 - Once you have confirmed Form 470 is accurate, check box to certify correctness of form.

Step 3 - Select *Send for Certification* or *Continue to Certification* button. If you are a user with full rights you have the ability to certify. Nevertheless, you may opt to have someone else certify the form. If you are a partial rights' user, you must send the form for certification and you will not have the option to continue to certification.

Category 2 Example

FCC Form 470 - Funding Year 2016

Basic Information Service Requests Technical Contact Information Procurement Information FCC Form 470 Review Certifications & Signature

Billed Entity Information

School District 4
100 Main Street
Springfield, PA 19064
555-555-5555
school.district4.user1@mailinator.com

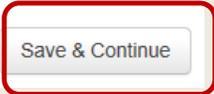
Billed Entity Number: 108
FCC Registration Number: 0123456789

Application Nickname

Please enter an application nickname here. *

Discard Form Save & Share Save & Continue

Use a very descriptive
nickname.



FCC Form 470 - Funding Year 2016

School District 4 - Wireless Upgrade Newville Elem - Form #160000064

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Basic Information

Service Requests

Technical Contact
Information

Procurement
Information

FCC Form 470 Review

Certifications &
Signature

Next, you will identify the category(s) of service requested.

Category(s) of Service

What are the category(s) of service that you are requesting? *

Category 1

- Internet Access and/or Telecommunications

Category 2

- Basic Maintenance of Internal Connections
- Internal Connections
- Managed Internal Broadband Services

Back

Discard Form

Save & Share

Save & Continue

FCC Form 470 - Funding Year 2016

School District 4 - Wireless Upgrade Newville Elem - Form #160000064

Last Saved: 11/5/2015 7:36 PM EST

Basic Information

Service Requests

Technical Contact
Information

Procurement
Information

FCC Form 470 Review

Certifications &
Signature

If you are using RFPs for any of the requested services, start by uploading them all first.

RFPs for Service Requests

Is there a RFP for any of the services you are requesting?

Yes ✓ No

Please upload all RFPs for the services you are requesting.

You must upload your actual RFP document. Uploading a document with a hyperlink to another website, including bid management sites, is not sufficient and can lead to funding denial.

FCC Form 470 - Funding Year 2016

School District 4 - Wireless Upgrade Newville Elem - Form #160000064

Last Saved: 11/5/2015 7:38 PM EST

Basic Information

Service Requests

Technical Contact
Information

Procurement
Information

FCC Form 470 Review

Certifications &
Signature

Next, you will describe the services you are requesting.

Service Requests: Category Two

There are currently no Category Two service requests. Please enter the service requests below by selecting 'Add New Service Request'

Add New Service Request

Edit Service Request

Remove Service Request

Narrative

If you would like to provide further detail about the services sought, you may do so in this box below. Examples of such further detail include specific additional capacity levels that you are seeking, additional descriptions of the services bidders should be aware of or any disqualification factors.

Back

Discard Form

Save & Share

Save & Continue

FCC Form 470 - Funding Year 2016

School District 4 - Wireless Upgrade Newville Elem - Form #160000064

Last Saved: 11/5/2015 7:38 PM EST

Basic Information

Service Requests

Technical Contact
Information

Procurement
Information

FCC Form 470 Review

Certifications &
Signature

Next, you will describe the services you are requesting.

Add New Service Request

Service Type *

- Internal Connections
- Basic Maintenance of Internal Connections
- Managed Internal Broadband Services

Function *

Please select a value

- Antennas, Connectors, Related Components
- Cabling
- Caching
- Firewall Services and Components
- Racks
- Routers
- Switches
- UPS/Battery Backup
- Wireless Access Points (WAPs)
- Wireless Controller

Add

FCC Form 470 - Funding Year 2016

School District 4 - Wireless Upgrade Newville Elem - Form #160000064

Last Saved: 11/5/2015 7:38 PM EST

Basic Information

Service Requests

Technical Contact Information

Procurement Information

FCC Form 470 Review

Certifications & Signature

Next, you will describe the services you are requesting.

Add New Service Request

Service Type *

- Internal Connections
- Basic Maintenance of Internal Connections
- Managed Internal Broadband Services

Function *

WAP

Quantity *

35

Unit
Each

Manufacturer

Cisco Systems or equivalent

Are you also seeking Installation, Activation and Initial Configuration for this service? *

- Yes
- No

Please select the RFP(s) that apply to this service request.

- RFP Dummy

Cancel

Add

FCC Form 470 - Funding Year 2016

School District 4 - Wireless Upgrade Newville Elem - Form #160000064

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Basic Information

Service Requests

Technical Contact Information

Procurement Information

FCC Form 470 Review

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Next, you will describe the services you are requesting.

Service Requests: Category Two

Use the Narrative to provide further details related to your funding request.

Please enter the service requests below by selecting 'Add New Service Request'

<input type="checkbox"/>	Service Type	Function	Manufacturer	Entities	Quantity	Unit	Installation and Initial Configuration?	Associated RFPs
<input type="checkbox"/>	Internal Connections	WAP	Cisco Systems or equivalent		35	Each	Yes	RFP Dummy

Add New Service Request

Edit Service Request

Remove Service Request

Narrative

If you would like to provide further detail about the services sought, you may do so in this box below. Examples of such further detail include specific additional capacity levels that you are seeking, additional descriptions of the services bidders should be aware of or any disqualification factors.

This request is for approximately 35 WAPs. These must be compatible with the District's existing Cisco Wireless Controller. We are also seeking installation and will be conducting a pre-bid walk through on December 15 at 2:00.

Back

Discard Form

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School District 4 - Wireless Upgrade Newville Elem - Form #160000064

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Basic Information

Service Requests

Technical Contact
Information

Procurement
Information

FCC Form 470 Review

Certifications &
Signature

Next, you will enter all information regarding state and local procurement rules.

State or Local Procurement Requirements

Are there state or local procurement/competitive bidding requirements that apply to the procurement of services sought?

Yes ✓

No

If applicable, provide a description of state or local procurement other bidding procedures.

Pre-bid meeting
Format and Deadline of Bids
Information that Must Be Submitted with Bids
Any Additional Restrictions for Vendors
Must Have a Valid SPIN
Must Offer Discounted Billing

Use the State and Local Procurement Requirements box to list any bidding restrictions you want to place on vendors. Vendors must...

Back

Discard Form

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FCC Form 470 - Funding Year 2016

School District 4 - Wireless Upgrade Newville Elem - Form #160000064

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Basic Information

Service Requests

Technical Contact
Information

Procurement
Information

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Basic Information

Service Requests

Technical Contact
Information

Procurement
Information

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Back

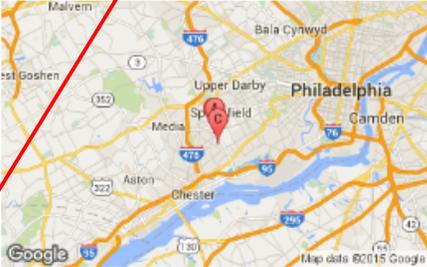
Send for Certification

Continue to Certification

Landing Page. See Posted 470 at the bottom.

Organizations

Organization	City	State	Zip Code	Type
School District 4	Springfield	PA	19064	Applicant
School District 4 School A	Springfield	PA	19064	Applicant
School District 4 School B	Springfield	PA	19064	Applicant
School District 4 NIF	Springfield	PA	19064	Applicant



My Tasks

Name	Received	Status	Deadline
Create FCC Form 470 - #16000043 - Voice Test 1	11/3/2015 8:31 AM EST	Accepted	

Customer Service Cases

Case ID	Topic	Nickname	Status	Date Created
No items available				

FCC Forms 470

Funding Year: Status: All Incomplete Certified

Nickname	Application Number	Funding Year	Status
Voice Test 1	16000043	2016	Incomplete
Wireless Upgrade Newville Elem	16000064	2016	Certified