



## Entering E-Rate: Where to Begin

E-Rate is a daunting process for beginners. The purpose of this Guide is to assist new E-Rate contacts (beginners) with where to start, so they can be certain that no deadlines have been missed, and all eligible funding has been received.

There are three primary tasks that must be done to acclimate to E-Rate:

- (1) Become knowledgeable of the program rules
- (2) Determine the status of your organization's compliance with filing forms and completing other time-sensitive tasks; and
- (3) Establish yourself as a user in the online filing system called "EPC" (E-Rate Productivity Center).

The Guide contains five sections:

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### Brief Program Overview

The Schools and Libraries (E-Rate) Program provides discount funding to all eligible K-12 schools (public, private and tribal) and public libraries to make affordable internet access and telecommunications services and equipment. E-Rate funding is classified as: Data Transmission Services and/or Internet Access (called Category 1); and Internal Connections, Managed Internal Broadband Services, and Basic Maintenance of Internal Connections (called Category 2). Discounts range from 20-90 percent of the costs of eligible services and equipment, depending on the school and library poverty level and the urban/rural status. In order to receive E-Rate funding, competitive bidding of the services and equipment is required by posting a form online at the E-Rate administrator's web site (E-Rate Division of Universal Service Administrative Company[USAC]). Bids must be accepted for a minimum of 28 days after which the most cost effective proposal must be chosen. E-Rate funding is then requested annually by applying to USAC. When funding is approved, it can be received one of two ways: either as a credit on the vendor's bill issued to you, or by paying the vendor's bills in full and then seeking reimbursement of the E-Rate portion, after the fact. The application process begins 6-12 months in advance of the funding year. Additional resources to learn the program basics:

- **E-Rate Resource Manual:** posted online at the South Dakota Department of Education's web site, <https://doe.sd.gov/ofm/sderate.aspx>.
- **Recorded trainings for South Dakota applicants:** available at the same link above - <https://doe.sd.gov/ofm/sderate.aspx>.
- **USAC Program Description:** <https://www.usac.org/wp-content/uploads/E-Rate/documents/Handouts/E-Rate-Overview.pdf>
- **USAC Learning Library:** <https://www.usac.org/E-Rate/learn/>

## Initial Questions for New E-Rate Contacts

When initially starting out, E-Rate contacts should first review these five topics, and take action where needed.

### 1) Are you a “User” in your organization’s EPC account?

EPC (the E-Rate Productivity Center) is the E-Rate online portal where applications are filed, and processes/correspondence are completed. Each organization has an EPC Account, and each EPC Account has an Account Administrator (AA) and Users. Before any further action can be taken, a new E-Rate contact must first determine if they are set up as a User for their organization’s EPC Account.

- Go to <https://forms.universalservice.org/portal/login>, scroll to the bottom of the page, and then select “Continue” then “Forgot Password” (do not enter a username or password on this page). On the next page, enter your email address, all lowercase. If the system does not send a password reset prompt to your email address within 2 minutes, you likely are not yet an EPC User.
- To become an EPC User:
  - Your organization’s EPC Account Administrator must set up your EPC user credentials by logging into EPC, selecting the “Manage Users” hyperlink, and then selecting “Create New User.” After the AA completes the creation of the new user information fields and selects “Submit,” the User will then receive an email message from the EPC system with instructions to create their password, log into EPC, select the “Tasks” hyperlink and then accept the EPC Terms and Conditions.
    - When your EPC account is set up the Account Administrator must grant you the rights to prepare and/or certify various forms in EPC. This is most easily done during the creation of your EPC account under “manage permissions.”
    - There are “full rights,” “partial rights” and “view only” permissions. Full rights users may create and/or certify forms. Partial rights users may create forms but are not authorized to certify the forms and the view only users are restricted and cannot create or certify forms. The different forms’ permissions include: 470, 471, BEAR/472, 498, Post-commitment, 486 and appeals. There is a shortcut “Apply All” dropdown option to grant the user full, partial or view only rights to all forms.
  - If your organization’s EPC Account Administrator is no longer with the organization, or if you’re unsure who your AA is, contact USAC at 888-203-8100 and they will assist you with becoming an EPC User and establishing a new Account Administrator for your organization.

### 2) Have you established your One Portal multi-factor authentication (MFA) validation choices?

One Portal is USAC’s umbrella sign-in system that requires all users to use multi-factor authentication (MFA) before they gain access to the online filing systems. The One-Portal/MFA set-up process requires several steps. See Section 6 of the E-Rate Resource Manual for detailed assistance.

- Technical Hints: Before you begin:
  - ✓ Be sure to use a Chrome or Firefox browser
  - ✓ Disable all privacy features (such as EFF Privacy Badger)

If you are not currently an EPC or BEAR authorized user (meaning your email address is not in the USAC system), or if you experience problems setting up your One Portal account, call CSB at 888-203-8100.

### 3) Are you subscribed to the South Dakota E-Rate Listserv?

The South Dakota E-Rate Coordinator maintains a one-way listserv that is used to disseminate regular updates about program changes, deadlines, funding commitments, training events, training guides and helpful reminders. If you are not currently receiving these regular E-Rate updates from Debra Kriete, the South Dakota E-Rate Coordinator, you can self-subscribe to the listserv here:

[https://www.k12.sd.us/maillinglist/SD\\_E-Rate](https://www.k12.sd.us/maillinglist/SD_E-Rate).

### 4) Are you subscribed to the USAC Monthly News Brief?

USAC emails a weekly News Brief to applicants once a month and sometimes additional “special” news briefs will also be emailed. If you are not currently receiving the USAC News Briefs, sign up for them at this link:

<https://www.usac.org/E-Rate/learn/news-brief/>

### 5) Have you signed up for a training account for becoming familiar with the EPC forms interface?

Trainers and other program participants can use USAC’s E-Rate Productivity Center (EPC) training site to practice filing forms, learn how to navigate the system, and train new users – all without affecting actual information and settings in the EPC production site. To request training account logon information, complete the form at this link: <https://apps.usac.org/sl/tools/EPC-Training-Request/default.aspx>

\* \* \*



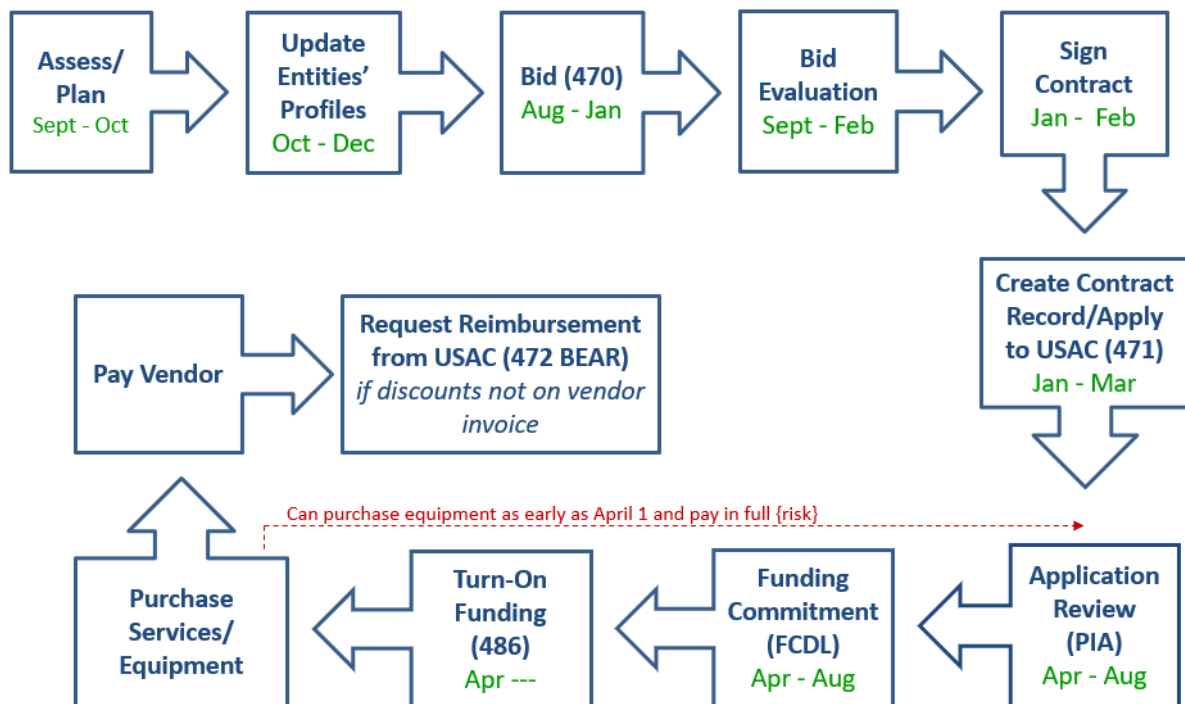
## Upcoming Funding Year: FY 2026

**Service period is July 1, 2026 through June 30, 2027 for circuits and internet**

**Service period is April 1, 2026 through September 30, 2027 for internal connections equipment.**

The E-Rate application process begins 6 - 12 months prior to the beginning of the next funding year. There are multiple deadlines that must be met during the application process. Funding Year 2026 begins July 1, 2026; therefore, the application process technically begins in July 2025, although most applicants begin their planning and forms filings in earnest in the fall of 2025.

The following are the key steps to the E-Rate application process that align with this flowchart, organized by the month(s) during which that step of the process occurs. Based on when the new E-Rate contact assumes their role, they should be informed of the approximate due date for various tasks; and determine whether the task has been completed or must be undertaken.



### October 2025 – Early January 2026:

- During the annual “**Admin Window**,” schools enter enrollment and NSLP eligibility data in each school’s EPC profile and add or remove entities if needed. Libraries will update square footage data if there are changes. The data inputted into school profiles is what the EPC system uses to calculate school district, library and consortia discount rates. The Admin Window is typically open from about mid to late October and closes in mid-January a few days before the Form 471 filing window opens. In FY 2025, for example, the last day of the Admin Window was January 9, 2025 right before midnight in the Eastern time zone and the Form 471 filing window opened on January 15, 2025.
  - If you have entered the E-Rate cycle when the Admin Window is closed, but prior to the Form 471 filing deadline, you can submit the form 471 using the existing entity profile data, and then request the information be updated by submitting a correction (called a Receipt Acknowledgment Letter [RAL] Correction). The information will be updated as part of the pre-funding review of your form 471.
  - To update enrollment and NSLP data during the Admin Window:
    - > EPC Landing Page > District Name > Discount Rate > Show Entities > Right click on each school’s name and select “Open link in new tab” > Click Manage Organization on each tab > Enter enrollment/NSLP data > Submit > Repeat for each tab (school).
- Calculate your available **Category 2 budget** for the upcoming funding year. Note that all of the calculations that follow are prediscount amounts which means that it is the total amount of the purchases, and then your E-Rate discount percentage is applied to compute the amount of E-Rate funding that is available to your organization.

Depending on your entity type and size, there are different options to calculating your available Category 2 budget as follows:

**Schools:**

- School District with 11 or more schools: Greater of these two options: 1) district enrollment X \$201.67, OR 2) Number of schools X \$30,175.
- School Districts with 10 or fewer schools (USAC calls these ‘child entities’) have a third “hybrid” option. The hybrid method allows these smaller districts to calculate their C2 budgets on a per-school basis using the greater of either the \$30,175 funding floor or the budget multiplier x number of students in each school, then adding up each school’s individual budgets to obtain the district-wide C2 budget. (Hint: a school with fewer than 150 students would want to use the \$30,175 funding floor for that school instead of the \$201.67 per student multiplier).
- Single School: School enrollment X \$201.67, OR \$30,175, whichever is greater.

**Libraries:**

- Library System with 11 or more libraries: Greater of these two options: 1) total square footage of the library branches in the library system X \$5.43, OR 2) # of library branches in the library system X \$30,175.
- Library Systems with 10 or fewer libraries (USAC calls these ‘child entities’) have a third “hybrid” option. The hybrid method allows these smaller entities to calculate their C2 budgets on a per library basis using the greater of either the \$30,175 funding floor or the budget multiplier, then adding up each library’s individual building budgets to obtain the system wide C2 budget. (Hint: a library branch with less than 5,558 square feet would want to use the \$30,175 funding floor instead of the \$5.43/sq ft.)
- Single Library: Square footage X \$5.4, OR \$30,175, whichever is greater.

The budget cycle is a five-year cycle that runs from FY 2026 through FY 2030. New E-Rate contacts in FY 2026 will start anew with the new five-year budget. USAC has a Category 2 budget tool that calculates the total amount of C2 funding currently available, using the most advantageous budget calculation option for each entity type. The tool will track each entity’s C2 budget, including amounts pending and committed, and remaining budgets. The tool is available in USAC’s Open Data platform:

<https://opendata.usac.org/E-Rate/E-Rate-C2-Budget-Tool-FY2021-/8z69-hkn7>.

To see specific data, use the simple Filters on the right toolbar (be sure to click “Apply” after selecting your filter). Then click ‘Export’ to download the results into Excel. The tool will not be updated with the data for FY 2026 – FY 2030 until later this fall.

**July 2025 (Typically Fall) – January 2026:**

- File **Form 470** to competitively bid equipment and services for which a new contract is required. To determine if a new contract is required, review the existing contract (if there is one) to determine if the contract is expiring and/or if any contract extensions are included. If the contract is expiring, a new Form 470 is required. A Form 470 also is required to be filed annually for services provided on a month-to-month (MTM) basis. A Form 470 is not required in the *remaining* years of a multi-year contract, or when an applicant is purchasing the Commercially-Available Business Class Internet Option

(CABIO) that costs no more than \$300/month and is for a downstream speed of at least 100 Mbps per building and 10 Mbps upstream (such as a DSL or Cable Internet service).

- To submit a new Form 470, select “FCC Form 470” at the top right corner of your EPC Landing Page.



- If you're unsure whether a Form 470 has been submitted yet, scroll to the bottom of your EPC Landing Page under “FCC Forms and Post-Commitment Requests” and select the Form Type and Funding Year. There you will see whether any Form 470s have been filed for your organization. If no results are returned, this means there have been no Form 470s filed for that year.

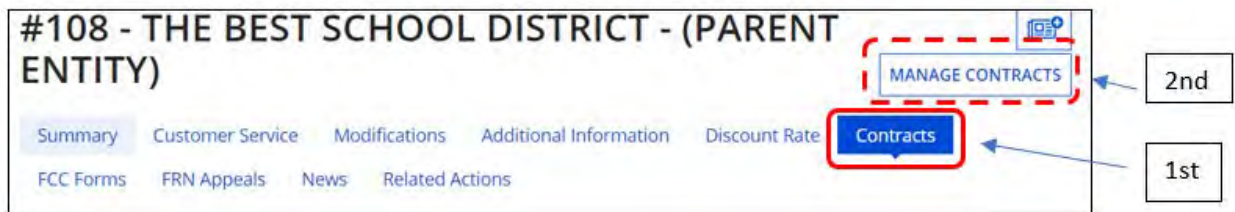
### January 2026 – February 2026

- During the bidding period, vendors review Form 470 postings and submit proposals directly to applicants as prescribed in the Form 470 or RFP.
- After a minimum 28-day bidding period, applicants then conduct a **bid evaluation** using price of eligible equipment/services as the most heavily weighted factor to select the most cost-effective proposal.
- Applicants then negotiate and sign contracts with awarded vendors. If local policies require, applicants must obtain board approval prior to signing the contract.
  - Unless you use a non-contract, MTM Category 1 service, contracts must be signed prior to filing Form 471. All Category 2 service/equipment procurements must have a contract.
  - Only the applicant must sign/date the contract **prior to** filing Form 471.



January 2026 – March 2026:

- Create **Contract Record(s)** in EPC for each newly signed contract. The CR is where you will upload a newly signed contract, identify associated Form 470 number, winning vendor, # of bids received, contract signing date, and contract extensions, if any.
  - To create new Contract Records or view those records previously created, click on the name of your school/library on the EPC Landing Page (just below the USAC logo in the top left corner of the page), select “Contracts” from the top toolbar, and then “Manage Contracts.”



- File **Form 471** by **the deadline which has not yet been announced, but is estimated to be around March 25, 2026**, to formally request E-Rate funding from USAC. Category 1 and Category 2 requests must be filed on separate applications, but multiple Funding Requests (FRNs) can be submitted on each application, as needed. The Form 471 imports discount calculation data from the entity’s EPC profiles, and each FRN will be linked to a Contract Record unless the service is being provided on a month-to-month (MTM) basis. The form also requires applicants to identify the specific services or equipment being requested, costs per circuit or per unit, quantity, and recipients of service.
  - To submit a new Form 471, select “FCC Form 471” at the top right corner of your EPC Landing Page.

April 1, 2026 – September 30, 2026:

- Applicants may **purchase/install** Category 2 equipment as early as April 1 prior to the funding year if they choose to pay for the equipment in-full, and with the risk of not receiving E-Rate funding approval. However, E-Rate funding cannot be reimbursed from USAC until at least July 1, or Form 486

certification date, whichever is later. The deadline to purchase/install Category 2 equipment is September 30, three months after the end of the funding year. This provides applicants with a full 18 months to purchase/install equipment instead of the 12-month funding year for recurring services. All equipment must be installed by September 30, even if installation is not being paid with E-Rate funding.

- Applicants must label all E-Rate funded equipment and maintain a Fixed Asset Register (FAR), (also known as an Asset Inventory) that provides details of all equipment including make & model, serial number (if available), physical location of equipment (building/room number), date installed, funding year, FRN number, PO number, and related payment information. See Section 15 of the E-Rate Resource Manual for more information and a sample asset inventory.

### February 2026 – FCDL Date:

- After the Form 471 is submitted, it will undergo **Program Integrity Assurance (PIA)** review where the PIA team will review the application to check for accurate discounts, eligible services, compliant bidding, and cost effectiveness. If PIA reviewers have questions, they will post the questions in EPC, and email the Form 471 contact, providing a link to their questions. Applicants have 15 days to respond. Failure to respond may result in denial of funding.
  - If you're unsure whether any PIA inquiries are pending for your applications, click on "Pending Inquiries" at the top of your EPC Landing Page, or call USAC at 888-203-8100.

### Pending Inquiries

Type

-- Select a Type --

Application/Request

-- Enter an Application/Request --

Funding Year

-- Select a Funding Year --

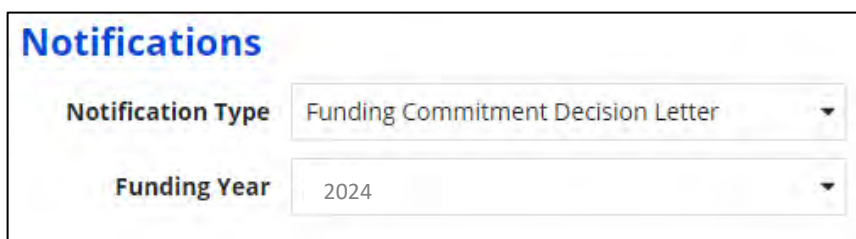
APPLY FILTERS

CLEAR FILTERS

### Late April 2026 – September 2026:

- USAC issues weekly funding "waves" containing **Funding Commitment Decision Letters (FCDLs)** that explains whether the FRN(s) was approved, reduced, denied or cancelled. The FCDL is posted in the organization's EPC portal, and the Form 471 contact and Account Administrator receive an email with two attached files: a PDF file of the FCDL and a summary of the approved funding in an Excel file. The files can also be accessed in EPC under the Notifications section on your Landing Page. USAC's goal is to have all FCDLs issued by September 1.





**Notifications**

**Notification Type** Funding Commitment Decision Letter ▼

**Funding Year** 2024 ▼

- Applicants have 60 days from the FCDL date to **appeal** to USAC if they disagree with a funding decision. If USAC denies the appeal, applicants have 60 days from the appeal decision letter to appeal to the FCC.
  - Appeals to USAC are submitted by selecting “Appeal” at the top right corner of your EPC Landing Page.



**My Applicant Landing Page**

Training  
**Universal Service Administrative Co.**

Welcome, THE BEST SCHOOL DISTRICT - (PARENT ENTITY)!

[Funding Request Report](#) | 
 [FCC Form 470](#) | 
 [FCC Form 471](#) | 
 [FCC Form 486](#) | 
 [Appeal](#) | 
 [IDD Extension](#) | 
 [FCC Form 500](#) | 
 [SPIN Change](#) | 
 [Service Substitution](#) | 
 [Manage Users](#) | 
 [Manage Organizations](#) | 
 [USAC Website](#) | 
 [Contact Us](#) | 
 [Help](#)

- Appeals to the FCC are submitted in the ECFS Filing System <https://www.fcc.gov/ecfs/>, listing Proceeding **02-6**.

### FCDL Date – October 28, 2026:

- Within 120 days of the FCDL date, or service start date (whichever is later), applicant must file **Form 486** in EPC. The Form 486 certifies their organization’s compliance with the Children’s Internet Protection Act (CIPA) and authorizes USAC to pay invoices that are submitted because services have begun or will begin.
  - To submit a new Form 471, select “FCC Form 486” at the top right corner of your EPC Landing Page.



- If you are unsure whether a Form 486 has been submitted, scroll to the bottom of your EPC Landing Page under “FCC Forms and Post-commitment Requests” and select the Form Type and Funding Year.



### July 1, 2026 – October 28, 2027:

- Applicants that have paid the full cost of the vendor invoice may seek **reimbursement** from USAC using Form **472 BEAR**. Likewise, vendors that have provided the applicant with discounted bills may seek reimbursement from USAC using the Form 474 SPI. A reimbursement form is not allowed to be filed with USAC until the service or equipment is delivered and received. For a BEAR form, the applicant must first pay the vendor in full. For a SPI form, the service provider is supposed to provide the service and bill the applicant for the non-discounted share.
- The deadline to submit reimbursement forms for recurring services (generally Category 1 services and Category 2 basic maintenance) is October 28, 2027 for FY 2026 (4 months after the funding year has ended which is June 30, 2026). The Deadline to submit reimbursement forms for non-recurring items (generally Category 2 equipment/licenses) is January 28, 2027 for FY 2026 (4 months after the last date to purchase/install equipment which is September 30, 2026). Applicants may request a single, 4-month reimbursement extension, but the extension request must be submitted by the original reimbursement deadline.
  - If you are unsure whether a BEAR or SPI has been paid, refer to Step 6 below.
  - Submit new BEARs in EPC using the new BEAR functionality. More information will be published when available.

\* \* \*



## Current Funding Year: FY 2025

The “current” funding year would be considered the funding year for which you are currently receiving services, as opposed to the upcoming funding year for which you are applying. Funding Year 2025 is from July 1, 2025 – June 30, 2026 (September 30 for non-recurring purchases such as equipment). The steps below will help a new E-Rate contact determine what has previously been submitted by their school or library and what steps remain to be completed in order to successfully obtain E-Rate funding.

### 1) Determine if your school/library submitted any applications for FY 2025.

First, download a spreadsheet showing your organization’s FY 2025 funding requests using the “FRN Status Tool” at <https://data.usac.org/publicreports/FRN/Status/FundYear>.

- Change Funding Year to FY 2025.
- Enter your school/library’s BEN (Billed Entity Number). If you don’t know your BEN, you can search for it at: [https://sl.universalservice.org/Utilities/BilledEntitySearch\\_Public.asp](https://sl.universalservice.org/Utilities/BilledEntitySearch_Public.asp).

**I. Required Criteria**

Funding Year

2025

**Please enter one or more of the following:**

State

SD

BEN

134238

CRN

SPIN (Go to SPIN Search):

Enter your own Billed Entity # (BEN)

- Then scroll down and click “Select Data Points” and then “Select All Data Points.”

☒ Select Data Points

**Step 2. Please select the datapoints you would like to include in your datafile:**

☒ **Select All Data Points**

- Then scroll to the bottom of the page and click “Build Data File.”

Clear Form

Build Data File

A spreadsheet will open showing all Funding Requests submitted by your school/library for that funding year. If the spreadsheet is empty, it means no applications were submitted in that funding year and you can ignore the remaining steps.

To see a synopsis of all funding requested/dispensed since 1998, go to: <https://tools.E-Ratecentral.com/us/stateInformation.asp?state=SD> and enter your school or library's Billed Entity Number (BEN) under 'Funding Quick Search' on the left side of the page. On the results page, click on each funding year to drill down into the FRNs.

To see copies of the actual forms, appeals and other post-commitment requests that were submitted since FY 2016, scroll to the bottom of your EPC Landing Page, and select the relevant form and funding year.

## 2) Review USAC's Open Data FRN Status Tool for A Snapshot of Your FY 2025 Funding Requests

<https://opendata.usac.org/E-Rate/E-Rate-FRN-Status-Tool-FY2016-/8xzh-ytkh>

Use the filters on the right side of the tool to identify your organization's FRNs for FY 2025 (and other years). Suggested filters are:

- Select 2025 as the funding year
- Select SD as the billed entity state
- Select "Current" as the form version.
- Applicant's Organization Name – use the "contains" filter and include the key word(s) of your organization.
- Billed Entity Number – if you know your BEN, enter it.
- **Do not use the other filters – no need and can filter out important results.**

Then select “Export” and “Download file” in CSV format for the “Modified data.”

**Export**

The file will open into Excel and can be saved as an Excel file and will provide the most up-to-date record of your funding requests.

Each row represents a separate Funding Request, called an FRN, that was submitted for that funding year. Each FRN has a unique number that begins with the funding year (FY 2025 have FRNs that begin 25####).

- Review Column N to see if the FRN(s) were Funded, Denied, Cancelled, or Pending.
  - If an FRN’s status is ‘Pending,’ contact USAC at 888-203-8100 and explain that you are new to your organization and ask if there are any open PIA inquiries for the Pending FRN (the FRN number is listed in Column F).

Column	A	B	C	D	E	F	N
Row	Form Version	Funding Year	Applicant's Organization Name	Billed Entity Number	Application Number	Funding Request Number	Funding Request Status
1	Current	2025	SD DOE	134238	251018393	2599022159	Funded
2	Current	2025	SD DOE	134238	251018393	2599022197	Funded
3	Current	2025	SD DOE	134238	251018393	2599022860	Funded
4	Current	2025	SD DOE	134238	251018393	2599023002	Funded
5	Current	2025	SD DOE	134238	251018393	2599023009	Funded
6	Current	2025	SD DOE	134238	251018393	2599023017	Funded

- For Funded FRNs, continue with the next steps.

### 3) Review the following columns to understand the key information of each funding request:

- Column S will show the vendor’s name. Column R will show the vendor’s SPIN number.

Column	S	R
Row	Service Provider Number	Service Provider Name
1	143002997	South Dakota Network, LLC
2	143002997	South Dakota Network, LLC
3	143002997	South Dakota Network, LLC
4	143001179	Midcontinent Communications
5	143002997	South Dakota Network, LLC
6	143001179	Midcontinent Communications

- Column W will show the date the school/library signed the contract with the vendor. If blank, it means the applicant indicated it was a month-to-month service for which no contract was signed.

Column AA will show the date that the school/library reported that the contract will expire for the initial term and Column AB will show whether the school/library reported whether any extension options are available and the date that the contract expires when all extensions are exercised.

Column	W	AA	AB
Row	Contract Award Date	Contract Expiration Date	Extended Contract Expiration Date
1	1/31/2024	6/30/2026	6/30/2029
2	1/31/2024	6/30/2026	6/30/2029
3	1/31/2024	6/30/2026	6/30/2029
4	1/31/2024	6/30/2026	6/30/2029
5	1/31/2024	6/30/2026	6/30/2029
6	1/29/2021	6/30/2026	6/30/2026

- Column AN and AO will show whether a Form 486 has been submitted and approved. Column AP will show the service start date listed and approved on Form 486.

Column	AN	AO	AP
Row	FCC Form 486 Application Number	FCC Form 486 Status	Service Start Date
1	402096	Approved	7/1/2025
2	402096	Approved	7/1/2025
3	402096	Approved	7/1/2025
4	402096	Approved	7/1/2025
5	402096	Approved	7/1/2025
6	402096	Approved	7/1/2025

- Column AZ will show the deadline to submit a reimbursement form to USAC.

Column	AY
Row	Last Date to Invoice
1	10/28/2026
2	10/28/2026
3	10/28/2026
4	10/28/2026
5	10/28/2026
6	10/28/2026

- Column T will show whether the service provider has filed the Service Provider Annual Certification ("SPAC" – Form 473) for the funding year. The SPAC must be filed before any invoicing for the FRN – whether a BEAR form or SPI form is filed – can be done. If the SPAC has not yet been filed, contact the State E-Rate Coordinator for assistance.

Column	T
Row	SPAC Filed?
1	Yes
2	Yes
3	Yes
4	Yes
5	Yes
6	Yes



- Columns AG – AL show the original and approved amounts of funding.

Column	AG	AH	AI	AJ	AK	AL
Row	FRN Total Pre-Discount Costs - Approved	FRN Original Requested Total Pre-Discount Costs	Discount Percentage - Approved	Original Requested Discount Percentage	Funding Commitment Request - Approved	Funding Request Original Requested Amount
1	\$2,079,552.72	\$2,079,552.72	0.64	0.64	\$1,330,913.74	\$1,330,913.74
2	\$218,055.00	\$218,055.00	0.64	0.64	\$139,555.20	\$139,555.20
3	\$69,014.40	\$69,014.40	0.64	0.64	\$44,169.22	\$44,169.22
4	\$24,240.00	\$24,240.00	0.64	0.64	\$15,513.60	\$15,513.60
5	\$18,000.00	\$18,000.00	0.64	0.64	\$11,520.00	\$11,520.00
6	\$183,000.00	\$183,000.00	0.64	0.64	\$117,120.00	\$117,120.00

- Columns AG, AI and AK contain the approved prediscount amount, approved discount percentage and approved funding.
- Columns AH, AJ and AL contain the originally requested prediscount amount, requested discount percentage and requested funding.
- Column P will show the Service Category (Data Transmission/Internet, Internal Connections, Basic Maintenance or MIBS)

Column	P
Row	Service Type
1	Data Transmission and/or Internet Access
2	Data Transmission and/or Internet Access
3	Data Transmission and/or Internet Access
4	Data Transmission and/or Internet Access
5	Data Transmission and/or Internet Access
6	Data Transmission and/or Internet Access

- Column AY will show the invoice deadline.

Column	AY
Row	Last Day to Invoice
1	10/28/2026
2	10/28/2026
3	10/28/2026
4	10/28/2026
5	10/28/2026
6	10/28/2026

#### 4) Determine if a Form 486 was filed for each FRN.

As shown above, check Columns AN – AP. If the approved Form 486 is not showing there, file Form 486 in EPC as soon as possible. If the Form 486 is being submitted after October 28, 2025 (or more than 120 days after the FCDL date shown in Column R (Wave Date) ), file the Form 486, then contact Debra Kriete, the South Dakota E-Rate Coordinator, at [dmkriete@comcast.net](mailto:dmkriete@comcast.net) for instructions on submitting an appeal to USAC to request that funding be restored.

**5) Determine whether a Reimbursement Form Needs to be submitted for each FRN.**

If Column AZ shows “Not Set” it means that neither an applicant Form 472 BEAR or vendor Form 474 SPI has been submitted to USAC seeking reimbursement. If the status is Not Set, the applicant should review their vendor service/equipment invoices to determine if the vendor provided discounted bills or whether the applicant paid the in full.

- If Column AZ shows \$0.00, it means that a BEAR or SPI was submitted to USAC and likely has been \$0-funded (denied). If Column AZ indicates a BEAR was submitted and has been \$0-funded, the applicant should contact USAC at 888-203-8100 to request details pertaining to the BEAR and exactly why it was denied. As long as the reimbursement deadline has not passed, the applicant should submit a new, corrected BEAR (there is no way to amend an existing BEAR).
- Applicants that have paid the full cost of the vendor invoice may seek **reimbursement** from USAC using Form **472 BEAR**. Likewise, vendors that have provided the applicant with discounted bills may seek reimbursement from USAC using the Form 474 SPI.  
The deadline to submit reimbursement forms for recurring services (generally Category 1 services and Category 2 basic maintenance) for FY 2024 is October 28, 2025 (4 months after the funding year has ended which is June 30, 2025).
- The deadline to submit reimbursement forms for non-recurring items (generally Category 2 equipment/licenses) is January 28, 2026 (4 months after the last date to purchase/install equipment which is September 30, 2025).
- Applicants and/or vendors may request 1, 4-month reimbursement extension, but the extension request must be submitted by the original reimbursement deadline.
- The exact invoicing deadline for each FRN can be found in Column AY.

After all of these steps have been completed, and related documents have been archived at the school/library where they must be retained for a period of 10 years following the last date to receive service in a funding year, FY 2023 can be considered “complete.”

\* \* \*



## Previous Funding Year: FY 2024

The “previous” funding year would be considered the funding year which ended June 30, 2025 (September 30, 2025 for non-recurring purchases such as equipment). Typically, after a funding year has ended, the remaining steps are to:

1. Determine if vendor invoices were discounted, and if not, be certain that the Form 472 BEAR reimbursement forms are submitted to USAC by the required deadlines: and
2. Archive all relevant documents related to the procurements, discounts, services and equipment received, asset registers, CIPA, and vendor invoicing for the funding year.

The steps required for determining whether funds have been committed and disbursed for the prior funding year are the same steps outlined above for the ‘Current’ Funding Year, except that applicants would download a spreadsheet showing your organization’s **FY 2024** funding requests instead of FY 2025. The spreadsheet can be downloaded using the FRN Status tool in Open Data using all the same parameters used for the FY 2025 file, except changing the Funding Year to FY 2024.

<https://opendata.usac.org/E-Rate/E-Rate-FRN-Status-Tool-FY2016-/8xzh-ytkh>

- Follow the remaining steps, beginning on Page 11 of this Guide.

### FY 2024 Reimbursement Deadlines

- The deadline to submit reimbursement forms for recurring services (generally Category 1 services and Category 2 basic maintenance) for FY 2024 is October 28, 2025.
- The deadline to submit reimbursement forms for non-recurring items (generally Category 2 equipment/licenses) for FY 2024 is January 28, 2026 (4 months after the last date to purchase/install equipment which is normally September 30, 2025).
- Applicants are permitted to request 1, 4-month reimbursement extension, and the extension request is required to be submitted by the **original reimbursement deadline**. To determine the exact deadline for each FRN, refer to Column AN.
- Submit new BEARs in EPC using the new BEAR functionality. More information will be published when available.

After all discounts/reimbursements have been received, and all related documents have been archived at the school/library where they must be retained for a period of 10 years following the last date to receive service in a funding year, FY 2024 can be considered “complete.”



# E-rate Funding Year 2025

## July 1, 2025 – June 30, 2026

South Dakota Applicants

Debra Kriete, Esq.  
South Dakota State E-rate Coordinator  
for the South Dakota Department of Education  
November 2024



## Agenda

- E-rate Fundamentals
  - Entities, Services, Discount %, Bidding
- Application Cycle - Overview
- Online Filing System – Overview



# E-rate Fundamentals

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3

## E-rate is...

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- A technology program for affordable broadband access
- Open to all K-12 schools, and public and tribal libraries
- Funded at \$4.9 billion per year, plus annual inflation adjustment
- Based on a competitive bid model to set prices for services and equipment
- Funding quantified as a discount percentage multiplied by the cost of qualified services and equipment

4

# E-rate is managed by...

---

## Federal Communications Commission

- Administrative agency in charge of regulations, enforcement, policies

## Universal Service Administrative Co. (USAC)

- Administrator of all universal service programs including E-rate

## Schools and Libraries Division of USAC (SLD)

- Division inside USAC responsible for E-rate

# Who Does What?

---

## FCC

Issues rules  
Issue legal decisions  
Interprets rules  
Sets all policies  
Supervises SLD  
Decides appeals & waivers

## USAC/SLD

Program administrator  
Reviews & processes form  
Must obtain policy direction from FCC  
Follows FCC policies



# The State E-rate Coordinator

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- Offers E-rate training and assistance to applicants & serves as liaison with SLD
- Maintains State E-rate Listserv
- Self-subscribe at this link:  
[https://www.k12.sd.us/MailingList/SD\\_E-Rate](https://www.k12.sd.us/MailingList/SD_E-Rate)
- Prepares & submits DDN State Network E-rate Application

7

## 3 E-rate Pillars

---

### Eligible Entity

- K-12 School per State law
- Library eligible for LSTA funding
- Tribal libraries

### Eligible Service

- Listed on Eligible Services List
- Delivered to eligible entity
- Must be competitively bid

### E-rate Discount

- Based on % of Free/Reduced Students & rural/urban location
- Correlate to E-rate Discount Matrix

8

# Eligible Entities

---

## Public, private, tribal schools

- Not for profit
- Must be recognized as school by State or by BIE

## Libraries eligible for funding under LSTA & Tribal libraries

- Must have separate independent budget
- Must pay for E-rate eligible services
  - Dual use libraries – Public library must have a separate budget and pay for technology to be able to apply for E-rate

# Definition of School

---

- Elementary or secondary education as determined by state law
  - Pre-k – including Head Start – when part of school district for students ages 3 or older
  - Day care centers do not qualify
  - Independent Head Start programs are not eligible

# Home Based Locations

---

Generally, services to homes are not eligible for E-rate

- Does not matter if this is the primary location of where student receives education.
- Two key exceptions:
  - residential areas of certain schools such as tribal, juvenile justice, children with disabilities and boarding schools with 35% or more of students qualify for National School Lunch Program
  - Off-campus hot spots for students without sufficient internet service at home

## Administrative Buildings - NIFs

---

- A building that is part of the district or library but is primarily administrative
  - If the building is not designated as a school by State, then it's an administrative building
  - Even if there is some classroom instruction in the building
- E-rate name is "Non-Instructional Facility ("NIF")
- Building must be listed on the funding application and must have its own Entity Number
- Qualifies for C1 funding **but not for C2 funding**
- Central network equipment supporting S/L buildings may be in a NIF

# E-rate Entity Numbers

- Each school, library or NIF must be listed on E-rate funding application as a recipient of service.
- Must have an E-rate assigned number called “Entity Number.”
- Definition of school based on state law
- Multiple schools in one building – each school should have its own entity number.



*1 physical building  
3 separate schools  
3 different E-rate Entity #s*

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## Eligible Services & Equipment

### Category 1: Broadband & Internet Services **TO** buildings

- Internet access service
- Data transmission service
- Category 1 funding is **not** capped

### Category 2: Network services/equipment **INSIDE** buildings

- Internal Connections equipment/service
- Managed Internal Broadband Services
- Basic Maintenance of Internal Connections
- Category 2 funding is **capped**

### FCC publishes annual Eligible Services List

<https://docs.fcc.gov/public/attachments/DA-24-1104A1.pdf>

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# C1 Data Transmission Lines

---

- High speed connections *to and between school and library buildings* leased from a service provider
- Public school districts with all buildings connected to the DDN will likely not have data transmission lines that they pay for
- Generally, if a building is not connected to DDN, then a data line or Internet line is needed for that school or library to obtain Internet access
- Data lines are most frequently used for a Wide Area Network service
  - Circuits that interconnect schools or libraries to one another
  - Also called “building to building” service

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# C1 Internet Access

---

Eligible Internet Access Service may include add-on features as part of the base service price such as -

- Basic firewall protection
- Domain name service
- Dynamic host configuration
- Filtering
- When these features are part of the basic Internet service and there's no additional charge, these features also qualify for E-rate funding.

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# C1 Other Eligibility

---

These charges qualify for E-rate

- Installation costs (mention on Form 470 bidding form)
- State, federal and local taxes
- Universal service fund charge

These charges don't qualify for E-rate and need to be deducted from funding requests

- Late payment charges
- Finance charges
- Paper statement fees
- Administrative charges not related to Internet or data transmission
- Administrative cost of collecting USF surcharge
- Property tax surcharge
- Ineligible internet features

# C2 Equipment/Service

---

Data network equipment and service *inside buildings* needed for broadband & Internet connectivity

## 3 Subcategories

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

**Funding is capped based on 5-year budget formula**



# C2 Internal Connections

Component	Component
Access Points	Uninterruptible power supply/battery backup for eligible equipment
Antennas	Wireless controller
Connectors	Software/operating systems of eligible equipment
Cabling	Licenses (right to use) for eligible equipment
Caching	Virtualized (cloud based) functionalities
Basic firewall functionality	Bundled warranty included in price (not separate fee)
Switches	Installation, configuration of eligible equipment
Routers	Basic training on use of equipment
Racks	Licenses

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## C2 Basic Maintenance of Internal Connections (BMIC)

- Equipment being maintained must be eligible
- Cost must be based on estimated time and materials
- Insurance type contracts are not eligible
- *Reimbursements limited to actual time and expense incurred on maintenance*
- Extended warranties are not eligible



- Software updates and basic technical support are eligible without having to document use of the service
- If prepaid for multiple years, you can only claim the annual cost of the maintenance and must annually for yearly cost

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# C2 Managed Internal Broadband Services (MIBS)

- Services provided by third party for operation, management, and monitoring of eligible internal connections
- Services may include:
  - Management and operation of the LAN/WLAN
  - Installation, activation and initial configuration of eligible components
  - On-site training on use of equipment
- Equipment ownership options
  - 3rd party manager may own equipment that is leased to the school or library.
  - School or library may own the equipment and contract for management services.
- MIBS includes network monitoring by personnel, but Basic Maintenance does not include monitoring

## Calculation of C2 Budgets

- **5-year cycle for C2 budgets – current 5-year cycle ends with FY 2025**
- All budgets will re-set for FY 2026 – no carry forward of funds
- Budgets are pre-discount amount
- E-rate discount is applied to quantify the amount of E-rate funding
- **See Excel spreadsheet for each school, district, library Category 2 pre-discount budget's remaining funds**

### Single School Budget:

$\$167 \times \text{total enrollment}$  OR  $\$25,000$ , whichever total budget is greater

### School Districts:

$\$167 \times \text{total district enrollment}$ , OR

$\$25,000 \times \text{total \# of schools in the district}$ , whichever total budget is greater

### Independent Libraries:

$\$4.50 \times \text{total square footage}$  OR  $\$25,000$ , whichever total budget is greater

### Library Systems:

$\$4.50 \times \text{total square feet of all library branches}$  OR  $\$25,000 \times \text{\# branches}$ , whichever total budget is greater

**Hybrid budget option for districts/library systems with less than 10 schools or library branches**

# E-rate C2 Budget Example

5 Yr. Budget Cap *	E-rate Discount %	E-rate will pay	Applicant's Share %	District must pay
\$747,108.00	60%	\$448,264.80	40%	\$298,843.20

- The C2 budget cap is the **pre-discount price**. The E-rate discount percentage then is applied to the budget cap to quantify the amount of available E-rate funding. In this example the Applicant's share is 40% that they would owe

## Returning Unused C2 Funds

- Committed but undisbursed C2 funding may be returned to the organization's C2 budget by filing FCC Form 500.
  - This funding may increase your final year's amount of available funding.
- Check the worksheet "Undisbursed Expired C2 FRNs"
  - If the invoice deadline has already passed, and there is available funding that was not paid out by USAC, file the FCC Form 500 to add funds back to your C2 budget.
  - Need to figure out which FRN(s) and which line items of the FRN have remaining funding to return the funds via the Form.

## Forecast v. Confirmed C2 Budgets

- Current student enrollment for the first year of using C2 funding will need to be confirmed by USAC
- Until the student enrollment is confirmed, the C2 budget is **“forecasted.”**
- Once the student enrollment is confirmed, the budget is then calculated and **“confirmed”** by USAC.
- If student enrollment increases after the budget is confirmed, enrollment number may be updated and request the C2 budget to be recalculated.
- If enrollment decreases after budget is confirmed, you are not required to reduce the enrollment number.

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## E-rate Discount Matrix

INCOME Measured by % of students eligible for the National School Lunch Program (NSLP)	CATEGORY ONE (C1)		CATEGORY TWO (C2)	
	URBAN Discount	RURAL Discount	URBAN Discount	RURAL Discount
Less than 1%	20%	25%	20%	25%
1% to 19%	40%	50%	40%	50%
20% to 34%	50%	60%	50%	60%
35% to 49%	60%	70%	60%	70%
50% to 74%	80%	80%	80%	80%
75% to 100%	90%	90%	85%	85%

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# Alternative Measures to NSLP

---

## 2 Options

1. Report '0' as number of free/reduced lunch qualifying students
2. Conduct **income survey** of students' families
  - NSLP form may be used in place of survey instrument
  - NSLP form or survey must be sent to each student
  - Ask whether family income based on family size meets the Income eligibility guidelines for NSLP and whether family receives any of the following funds --
    - Medicaid
    - Supplemental Nutrition Assistance Program (SNAP), formerly Food stamps
    - Supplementary Security Income (SSI)
    - Federal public housing assistance or Section 8
    - Low Income Home Energy Assistance Program (LIHEAP)
  - All these programs have same IEGs as NSLP

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# Competitive Bidding

---

- All E-rate eligible services and equipment must be competitively bid with a few exceptions
- Complete the E-rate bidding form (FCC Form 470) and post it online for vendors to review and decide whether to submit a proposal.
- Bidding must be open and fair to all potential bidders
- Vendors may not provide any assistance with drafting of Form 470
- Must accept bids for minimum of 28 days
- After bid period ends, evaluate bids and select **most cost-effective** bidder

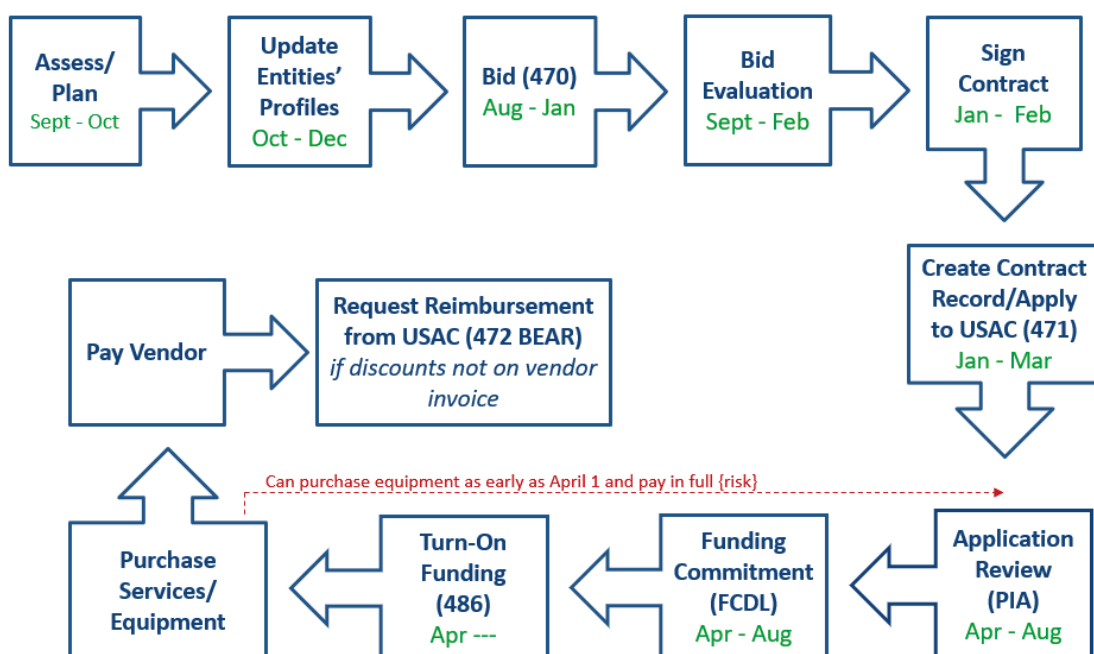
28



# Program Life Cycle

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## Big Picture



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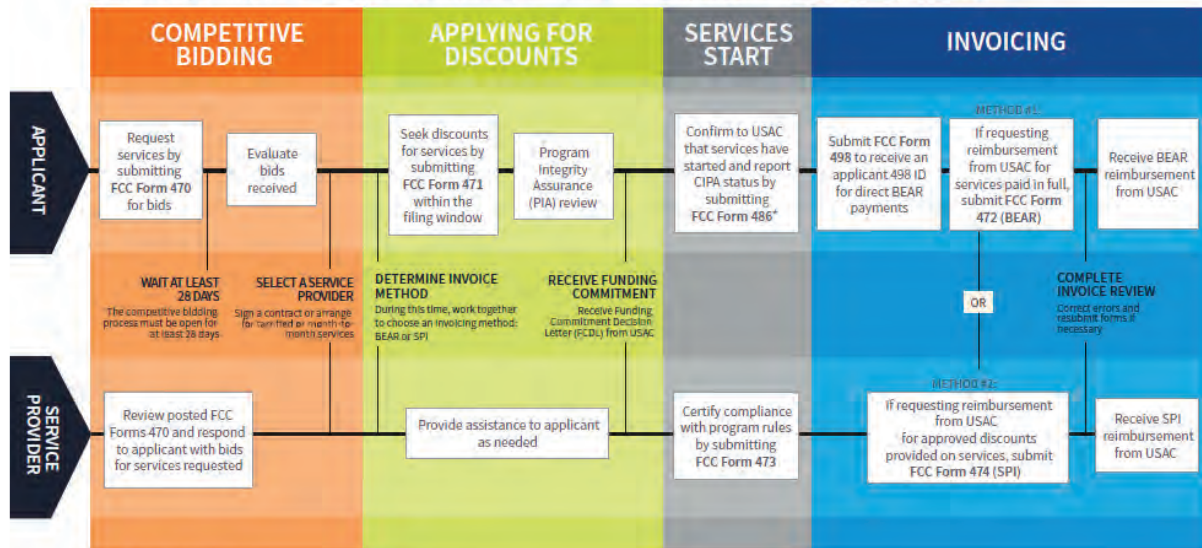


## Schools and Libraries (E-rate) Program APPLICATION PROCESS

### BEFORE YOU BEGIN:

**APPLICANTS:** Applicants must first have an entity number and an E-rate Productivity Center (EPC) account.

**SERVICE PROVIDERS:** Service providers must first obtain a Service Provider Identification Number (SPIN /service provider 498 ID) by submitting FCC Form 498.



#### FOR MORE INFORMATION:

- Website: The application process is broken down in detail for both applicants and service providers on the E-rate Program website ([www.usac.org/e-rate](http://www.usac.org/e-rate)).
- 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.

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## When is the Funding Period?

- Funding/service period begins July 1, 2025, for internet, data transmission service, basic maintenance and managed internal broadband services
- Service period for Category 2 equipment is April 1, 2025 through September 30, 2026
- Applicants must determine service & equipment needs 6 – 12 months ahead of funding year to conduct bidding and apply for funding per E-rate cycle and deadlines

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# E-rate Productivity Center (EPC)

ONLINE FILING PORTAL FOR  
MOST E-RATE FORMS

## EPC Overview

- E-rate Productivity Center (EPC) is the online filing system for most E-rate forms
- EPC log-in requires Multi-Factor Authentication
- Each person needs to be set up as a user
- To determine whether you are set up in EPC as a user, go to <https://forms.universalservice.org/portal/login>
  - Select **Continue**
  - Select **Forgot password?** link
  - Enter your email address in all lower-case letters and then select **Reset via Email**
  - If you do not receive a system-generated email from EPC to re-set your password within about 2 minutes, then you can assume you're not set up in EPC as a user

# To Become an EPC User

- Two options available
- Easiest Process
  - Ask your school or library “Account Administrator” of EPC to create your account
  - From the Landing Page, choose “Manage Users” and then “Create a New User”
  - Once the AA completes the required fields, a system-generated email will be sent to the new user with instructions to create a password, log into EPC, click on “Tasks” and accept the EPC Terms and Conditions
- 2<sup>nd</sup> Option if the AA is no longer with the school or library or you’re not sure who the AA is –
  - Call the E-rate Client Service Bureau at 888 203 8100 and ask them to set up a new user. They will help you and provide specific instructions to follow

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## Dashboard View

Dashboard will show systems for which you have access:

- To enter **EPC**, click **here**
- To enter **ECF**, click **here**

**E-Rate Productivity Center (EPC)** - EPC is the online system for E-Rate program participants to submit applications, manage program processes, and communicate with USAC. Applicants and service providers use EPC to prepare, submit, and certify E-Rate invoicing forms for Funding Years 2016 and later, including FCC Form 472 BEAR, FCC Form 473 SPAC, and FCC 474 SPI. For more information, please visit the applicant or service provider invoicing page at <https://www.usac.org/e-rate/> or contact the E-Rate Customer Service Center at (888) 203-8100.

**Emergency Connectivity Fund (ECF)** - Emergency Connectivity Fund participants use the ECF Portal to submit applications and review notifications regarding their program activities. Using this link, schools and libraries can also access the FCC Form 472 (BEAR) and service providers can access the FCC Form 474 (SPI) to request ECF reimbursement.

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# EPC Landing Page

News Tasks (4) Records Reports Actions

Cybersecurity Pilot Program  
EPC Invoice

My Applicant Landing Page

Training  
Universal Service Administrative Co.

Welcome, Lawrence South Dakota School District

Pending Inquiries

Funding Request Report | FCC Form 470 | FCC Form 471 | FCC Form 486 | Appeal | IDD Extension | FCC Form 500 | SPIN Change | Service Substitution | Manage Users | Manage Organizations | EPC E-Rate Invoicing | USAC Website | Contact Us | Help

Records Applicant Entities

## #120 - Lawrence South Dakota School District

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

Records Applicant Entities

## #120 - Lawrence South Dakota School District

Summary Customer Service Modifications **Additional Information** Discount Rate

Category

-- Select an Option --

-- Select an Option --

Related Organizations

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# Updating Entity Profiles

Category Related Organizations

Relationship Type Related Entities

Entities

Entity Number	Entity Name
121	Lawrence Primary School
122	Lawrence High School
123	Lawrence Administration Building

Open link in new tab

Open link in new window

Open link in incognito window

Open link as

Save link as...

Copy link address

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# Manage Organization

**MANAGE ORGANIZATION**

This function allows you to update information about an entity or BEN.

Records Applicant Entities

## #121 - Lawrence Primary School

Summary

Modifications

Additional Information

Category Two Budget

Contracts

FCC Forms

News

Related Actions

**MANAGE ORGANIZATION**

### Modify An Organization

**Name \***

Lawrence Primary School

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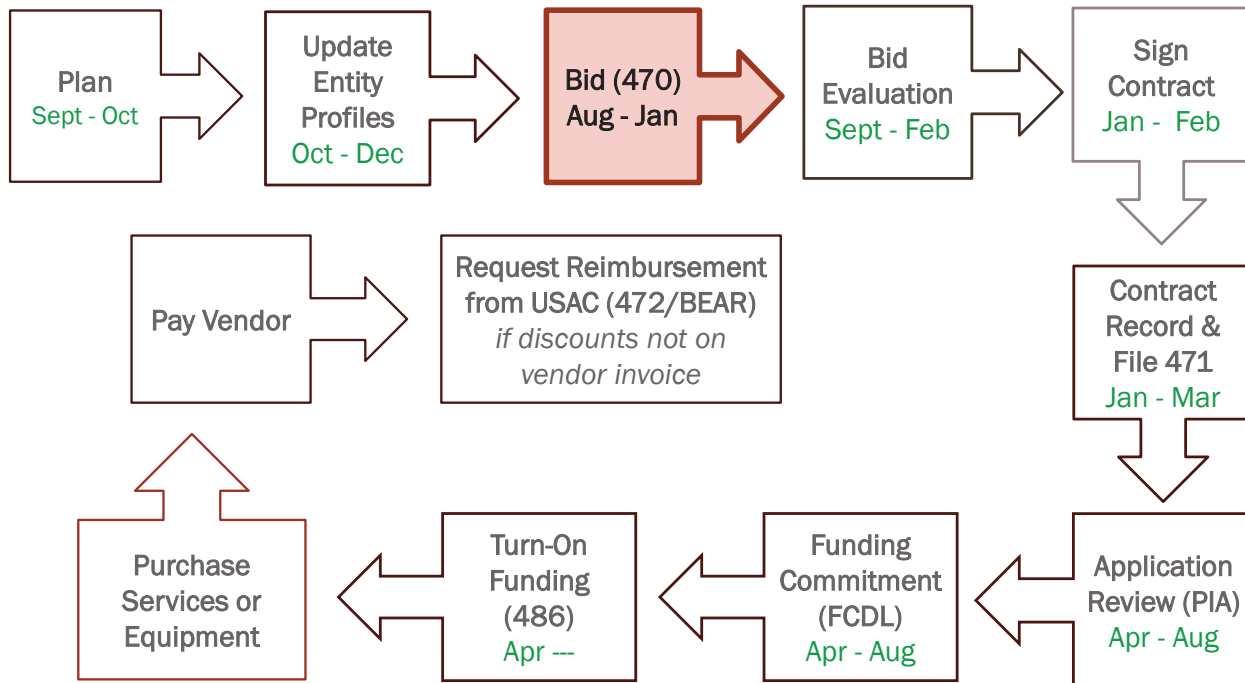


# Form 470 Bidding

COMPETITIVE BIDDING  
ONLINE FORM



## Where we are:



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## Form 470 is required for:

- New service or equipment
- Existing service under contract that will expire before June 30, 2026
- Month to month non-contract existing service

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## When a Form 470 is NOT required

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- **Multi-year contract** that will be in effect through at least 6/30/2026 and was previously bid on a form 470
- Contract expires 6/30/2025 but has specific years of **voluntary extensions noted in the contract**
  - Need to execute a written amendment/extension before filing 471
- **Commercially Available Business Internet Service**
  - Publicly available to non-residential customers (such as enterprise, small business, or other government customers) in the same form and at the same rates that it is offered to schools or libraries
  - 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
  - Service must provide bandwidth speeds of at least 100 Mbps downstream and 10 Mbps upstream

## Preferred Manufacturers *or Equivalent*

---

- For any equipment or service, you may state your preferred manufacturer but must also explicitly state “*or equivalent*”
- The online filing system for C2 has a dropdown list of manufacturers to choose from
- If your preferred manufacturer isn’t listed choose the **Other** option and be sure include “or equivalent”
- Information for narrative text box
- You may require vendors to submit evidence of equivalent features
- You may list your existing equipment and require new equipment to be compatible and interoperable
- Both these requirements may be grounds for disqualification if a bid fails to meet either or both requirement

# Requests for Proposal

---

- Request for Proposal is any supplemental document that an Applicant shares with Vendors in addition to posting a Form 470
- E-rate does not mandate the use of an RFP except for dark fiber or self-construction of fiber procurements
- RFPs are not required by state law
- Category 2 cabling/wiring projects may benefit from an RFP and other Category 2 data network projects, to describe your needs and requirements in more detail than the Form 470 allows
- RFP documents must be uploaded when preparing Form 470
- Additional information provided during bidding period must also be uploaded
- If significant “cardinal” changes are made to your RFP, you need to either post a NEW Form 470 or EXTEND the bidding period to be 28 days from the date when the significant changes were made

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# Consultants

---

- E-rate Consultants assist applicants – usually fee-for-service – with E-rate requirements
- Applicant must sign a Letter of Agency to authorize Consultant to file forms ahead time
- Consultant must obtain a Consultant Registration #
- Applicant must link the CRN in the Applicant’s EPC portal
- Consultant is prohibited from being the EPC Account Administrator
- Consultant **must** be completely independent of any service provider and have no conflict of interest
- Consultant may not select vendors on behalf of Applicant

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# Important Bidding Info for 470

- Set deadline for accepting bids that is at least 28 days from the date of posting of Form 470
- State that you reserve the right to reject late bids
- Specify what information must be included in the bid. For example:
  - Price quote for specific equipment/service listed on Form 470
  - Firm quote with no contingencies such as site survey
  - Vendor must provide SPIN
  - If bidder is submitting on behalf of Vendor, bidder must provide documentation to verify Vendor has authorized and will honor bid
  - Vendor's standard terms and conditions
  - Proof of equivalency of alternative manufacturer's equipment
- Itemize any disqualification factors
  - Does Vendor need to be located nearby?
  - If requesting installation, must Vendor be willing and able to provide these services?
  - Must Vendor provide discounted bills {Is applicant willing to wait for FCDL?}

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# Important Bidding Info for 470 (continued)

Specify who and how vendors should contact you with any questions.

- Who will be responsible for answering questions?
- Do you want the vendor to email you or call you?
- **Consideration** – If you are assisted by a consultant, require questions and bids to be sent to both an employee with the applicant and the consultant and require consultant to copy you on responses and other communications with vendors
  - This ensures you will have a record of all communications
  - This ensures that you will receive all bids and be able to retain them in compliance with E-rate record retention



**Ultimately the responsibility for complying with bidding requirements and record retention falls to the Applicant. All bids, winning and losing and all vendor communications must be retained for 10 years from the end of the service delivery period. {September 30, 2036}**

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# Open and Fair Bidding Required

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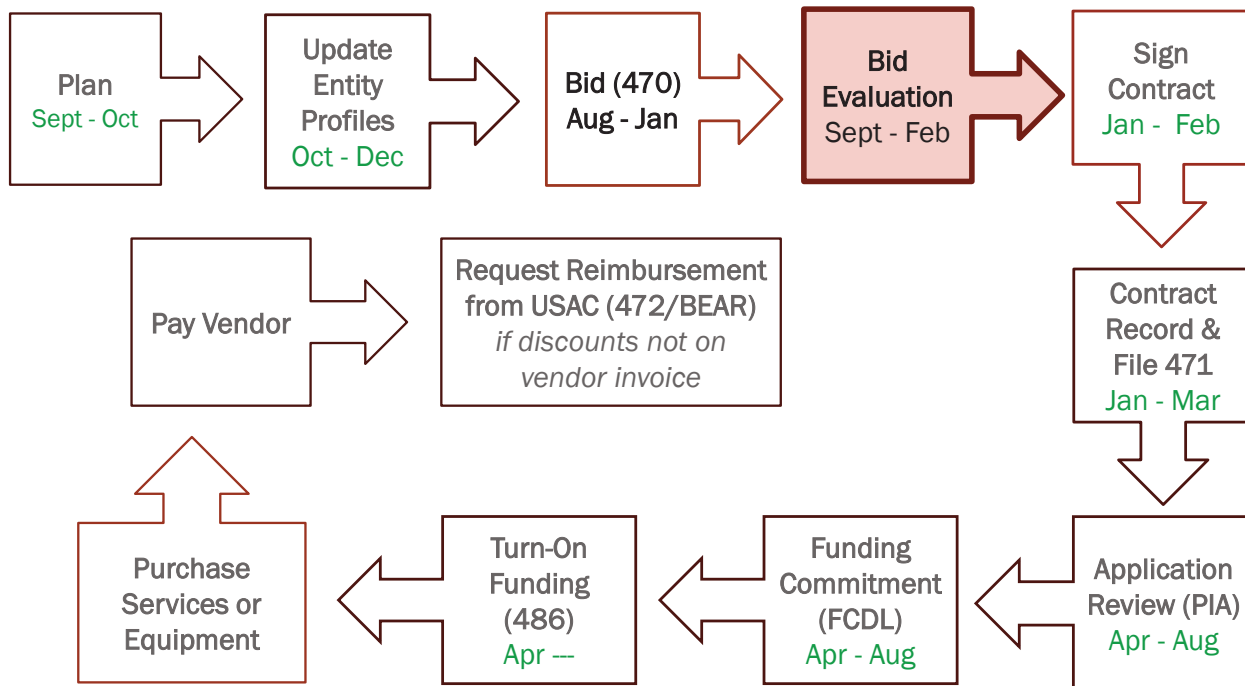
- **Open** means no secrets.
  - Share same information with **all** prospective bidders
    - This is the reason for RFP upload requirement
  - No bidder should have access to 'inside' information that provides one bidder with an unfair advantage over other bidders
  - Pre-bidding discussions must be neutral
- **Fair** means bidders are treated the same
  - No bidder has advance knowledge of the project information



## Bid Evaluation

---

## Where we are:



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## Overview

After 470 is posted for at least 28 days, it's time to evaluate bids.

- Rely on the deadline set forth in your Form 470 if it was later than the minimum 28 day waiting period

Applicants must perform bid evaluation and make vendor selection.

- Consultant may make recommendations and provide guidance, but the applicant must make decisions

Review proposals to verify compliance with minimum bid requirements.

- Keep record of reasons for disqualification of any non-compliant bids

If late bids were submitted, verify Form 470 minimum bid requirements mandated hard deadline for bids

- If so, you can disqualify late bids
- If you prefer, you may consider these proposals, but you must consider all late bids up to when you begin your bid evaluation.
- If Form 470 (or RFP) was silent, consider all bids received until the date you begin your bid evaluation

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# Bid Evaluation Matrix

- E-rate **eligible price** must be the most heavily weighted factor
- **Price of ineligible items** may be a separate category
- Other factors could include –
  - Prior experience including past performance
  - Personnel qualifications including technical excellence
  - Management capability including schedule compliance
  - Local vendor
  - Technical solution

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## Sample Evaluation

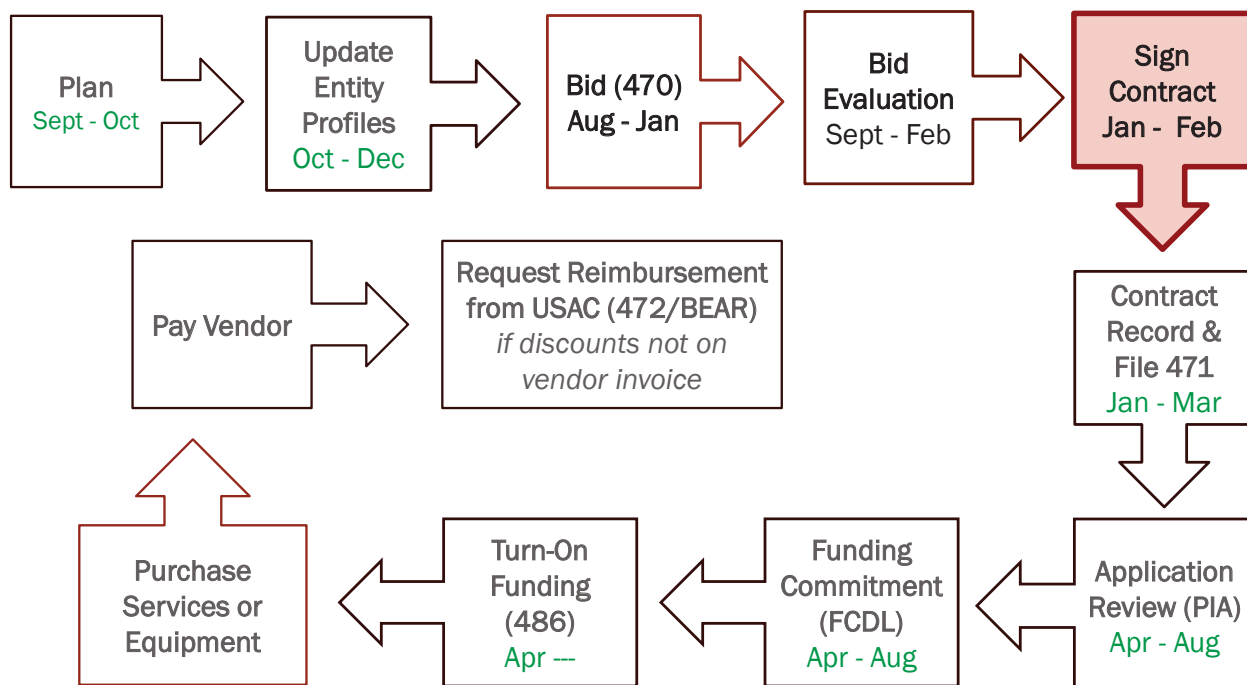
Factor	Maximum # Points
Price of the eligible products and services	50
Technical solution (Equivalence, compatibility and interoperability of equipment with existing equipment)	20
Ineligible cost factors (Additional costs not paid by E-rate to implement solution)	20
Management capability (Personnel qualifications, prior experience)	10
Total Available Points	100

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# Contracts

## Where we are:



## When **C1** Contracts are required

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- New Category 1 services that are not MTM
  - Must have posted a FY 2025 Form 470
- Amending existing Category 1 contract to add additional service quantity or extend term
- Original contract must allow for the amendment
  - Language was included on Form 470 and in contract for additional service and/or specific # years of voluntary extensions
  - Amendment should be in writing and signed by Applicant prior to completing Form 471
  - If time does not allow, send email to Vendor with information for amendment or extension

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## When **C2** Contracts are required

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- All new Category 2 equipment and services require a signed contract
  - Must have posted a FY 2025 Form 470
  - One-time equipment purchases (Internal connections)
  - Basic Maintenance of Internal Connections
  - Managed Internal Broadband Services
- Rarely seen, but it's possible to amend BMIC and MIBS to extend term
  - Language must have been included on Form 470 and in original contract for voluntary extensions

58

# Contract Timing & Steps

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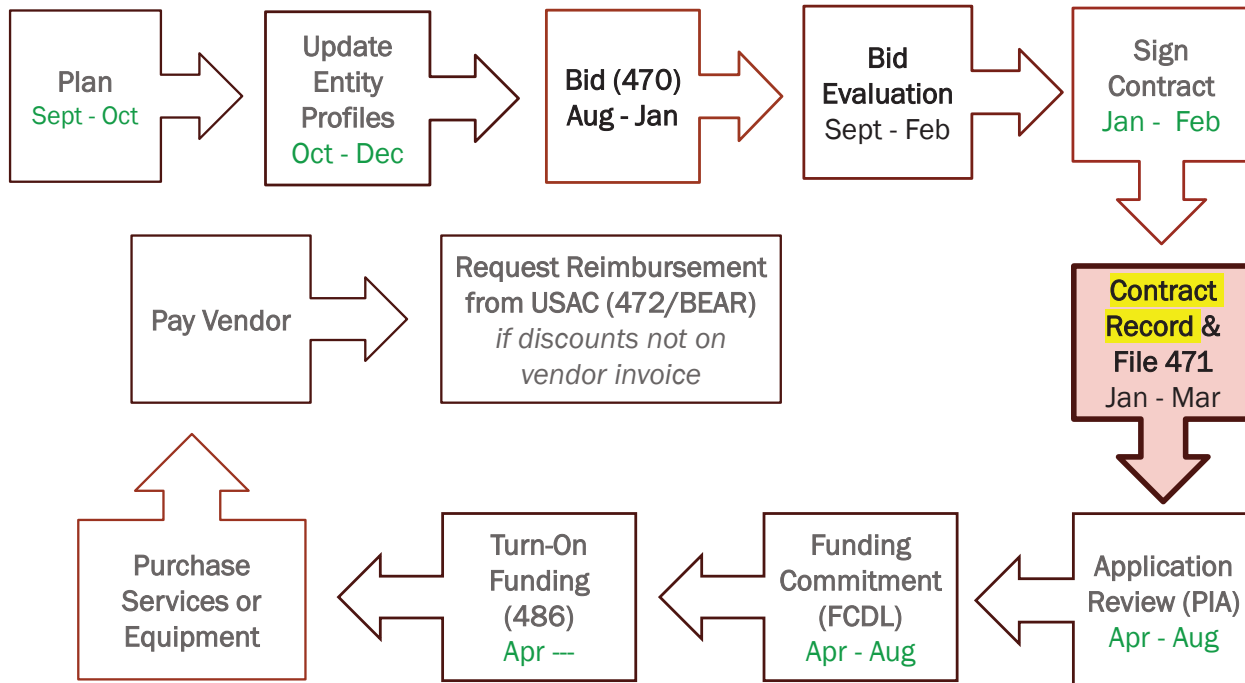
- **AFTER** 28 days from posting date of Form 470
- **AFTER** completion of bid evaluation and vendor selection
- Applicant Signature **BEFORE** filing 471
- Contract Record created **BEFORE** filing 471



## Creating Contract Record in EPC

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## Where we are:



61

## Create Contract Record in EPC

- Enter information about new contracts inside EPC before starting form 471
- Create new record if you discover an error on a previous EPC contract record that was created and will be listed on the FY 2024 form 471
- Do NOT create a new contract record for an extension of a contract that already has its own contract record.
- Detailed instructions on creating a contract record will be provided during November 20, 2024 webinar

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# Navigation to “Manage Contracts”

Click on the “Manage Contracts” button

Records Applicant Entities  
**#125300 - MCGUFFEY SCHOOL DISTRICT**

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

**MANAGE CONTRACTS**

## Manage Contracts

### Contracts - MCGUFFEY SCHOOL DISTRICT (BEN: 125300)

Use the dropdown to select the type of contract you would like to edit or remove. Click the Add a New Contract button at any time to create a new contract for your organization.

Contract Type

#### My Contract Drafts

You have no contract drafts for this organization. Click the Add a New Contract button to create a new contract.

CLOSE

**ADD A NEW CONTRACT**

EDIT

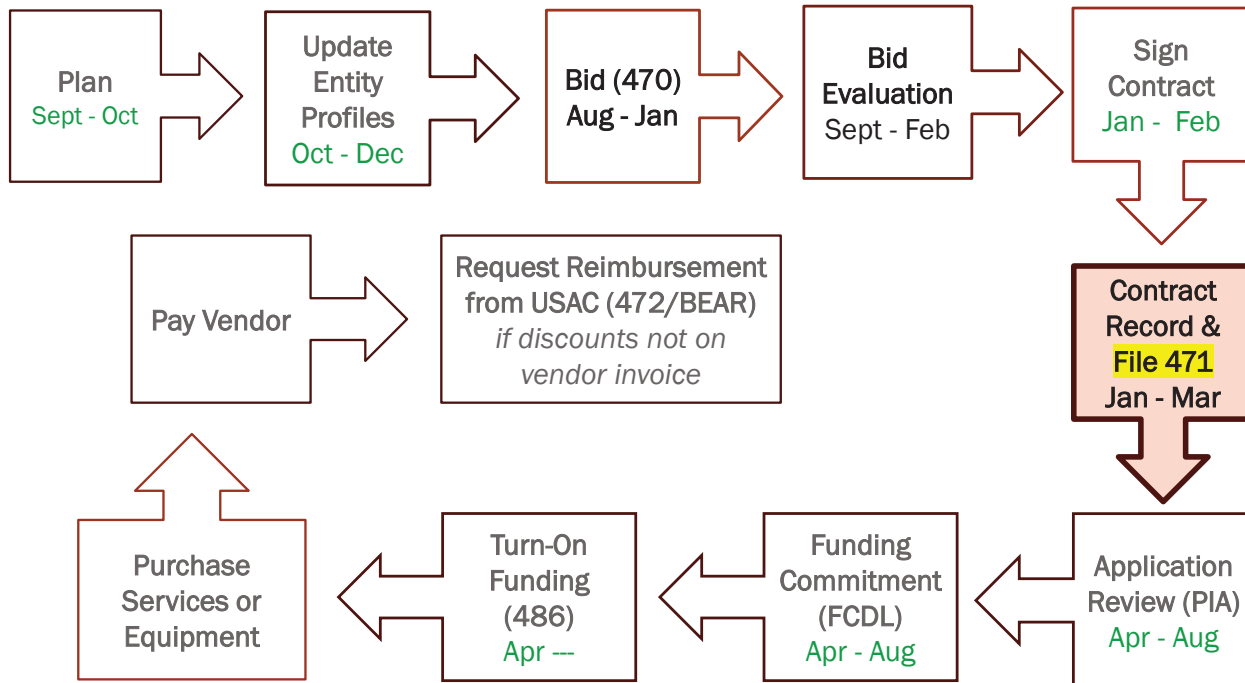
DELETE

Click on the “Add a New Contract” button



# Form 471 Application

## Where we are:



65

## Overview

- Formally requests E-rate funding
- Itemizes services/equipment and associated costs
- Quantities discount calculation and amount of funding
- Filed by Billed Entity

66

# When and How Many to File

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- When to file:
  - Each year sometime in the fall, SLD announces the “window” period during which a Form 471 may be submitted – opening and closing dates
  - SLD prefers a deadline by late March in order to have time to process as many applications as possible prior to July 1 start of the funding year
- How many Form 471s to file?
  - Separate applications must be filed for C1 and C2
  - May include multiple “funding requests” in the same category on same application or you may opt to file one 471 for each funding request
  - Off-line templates available to pre-populate and upload to 471 to streamline form filing

## Funding Requests

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- Each separate vendor and contract require a funding request
- Different services or components in one contract will be line items in the same funding request
- Each C2 subcategory (IC, BMIC, MIBS) must be a separate funding request

# How to Prepare Form 471

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- Need to quantify prediscount amount
- Quantify and itemize ineligible costs
- Use cost allocations if service/equipment has mixed eligibility
- Separate user guide will be sent to listserv in January

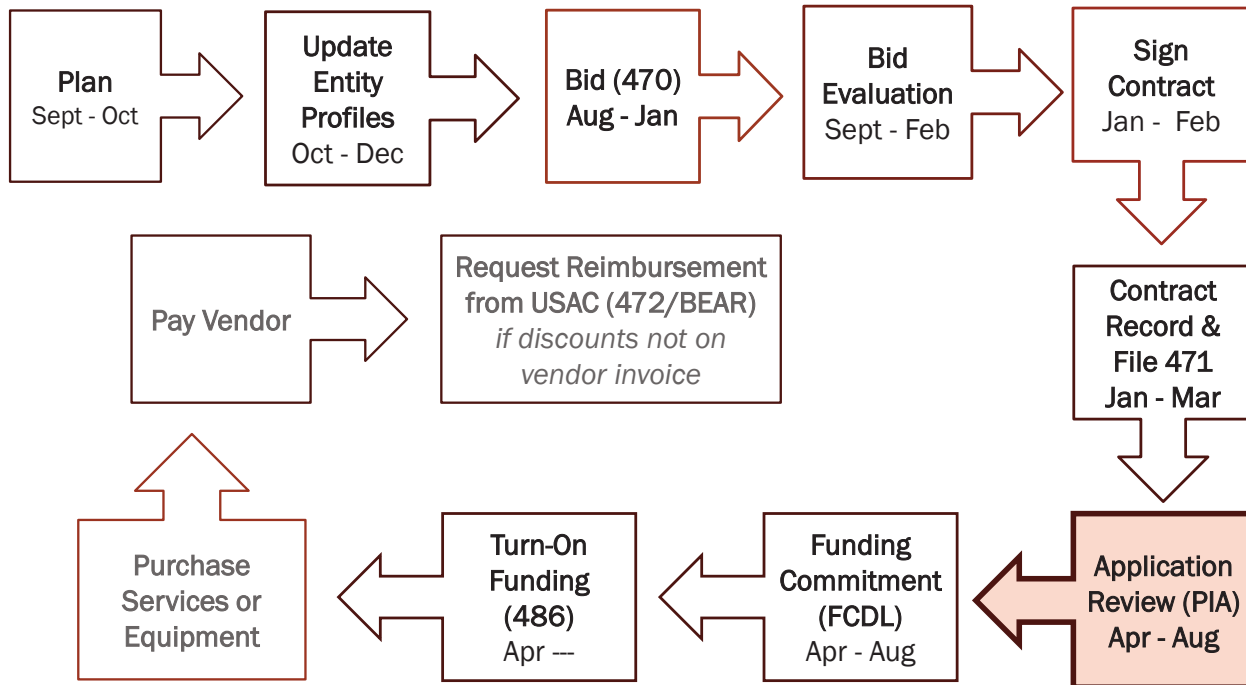
69



## Pre-funding Review (PIA)

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## Where we are:



71

## Pre-funding Review – “PIA”

- After 471 is filed, USAC reviews each application for compliance with rules, called “Program Integrity Analysis” or “PIA”
  - Eligible Entities
  - Competitive Bidding
  - Eligible Services/Equipment
  - Appropriate Discount Level
  - Category 2 Budget Caps
  - Contract signed after 470 allowable contract date and prior to submission of 471
- All inquiries are communicated in the EPC portal and must be answered in the portal
- An email is sent to the 471-contact person to advise that the questions have been posted in EPC

72

# Answering PIA Questions

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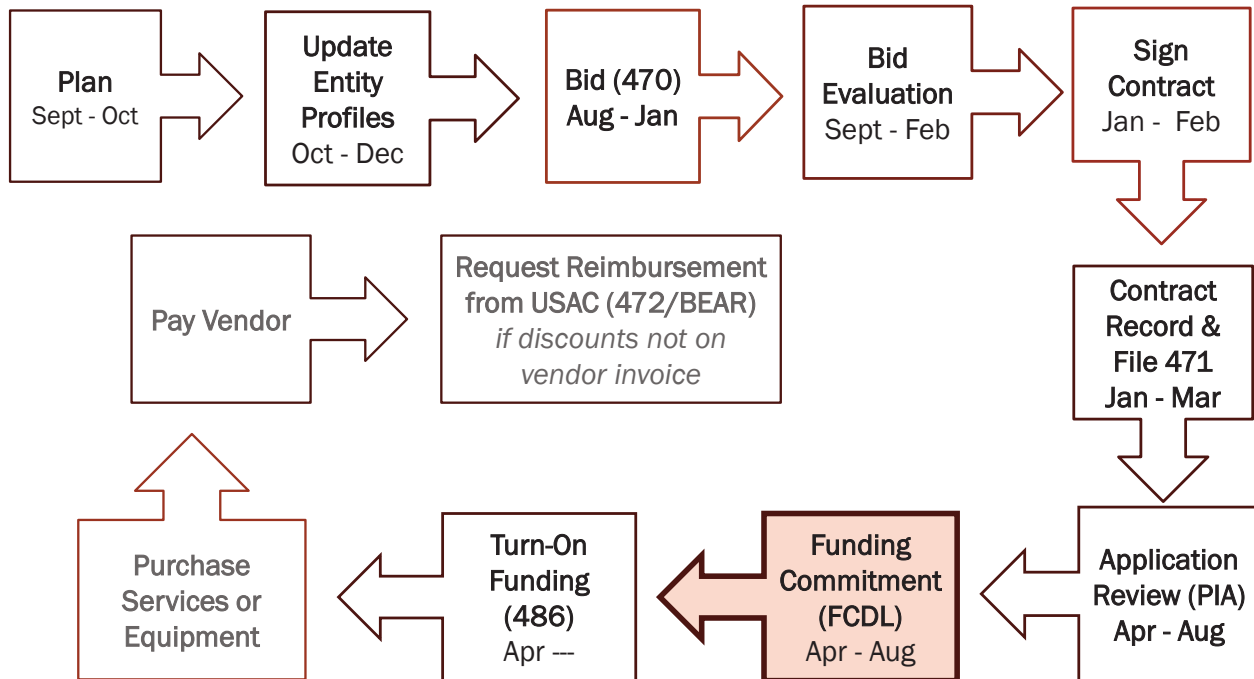
- 15-day response time, with a reminder on the 7<sup>th</sup> day
- Must respond in EPC and upload attachments if appropriate
- If you do not understand a question, email or call the reviewer and ask for clarification
- If you need more time, request a 7-day extension in EPC
- Do NOT ignore inquiries – potential denials due to not answering questions



## Funding Commitments

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## Where we are:



75

## Funding Commitment Decision Letter

- FCDL = Funding Commitment Decision Letter
- Emailed to 471 contact person and Account Administrator with PDF and Excel file
- Informs you which funding requests are approved or denied
- Provides information for the next form - Form 486
- Can appeal if you don't agree with your decision
  - Must do so within 60 days
  - Must appeal first to SLD and then to FCC if SLD does not approve appeal

76

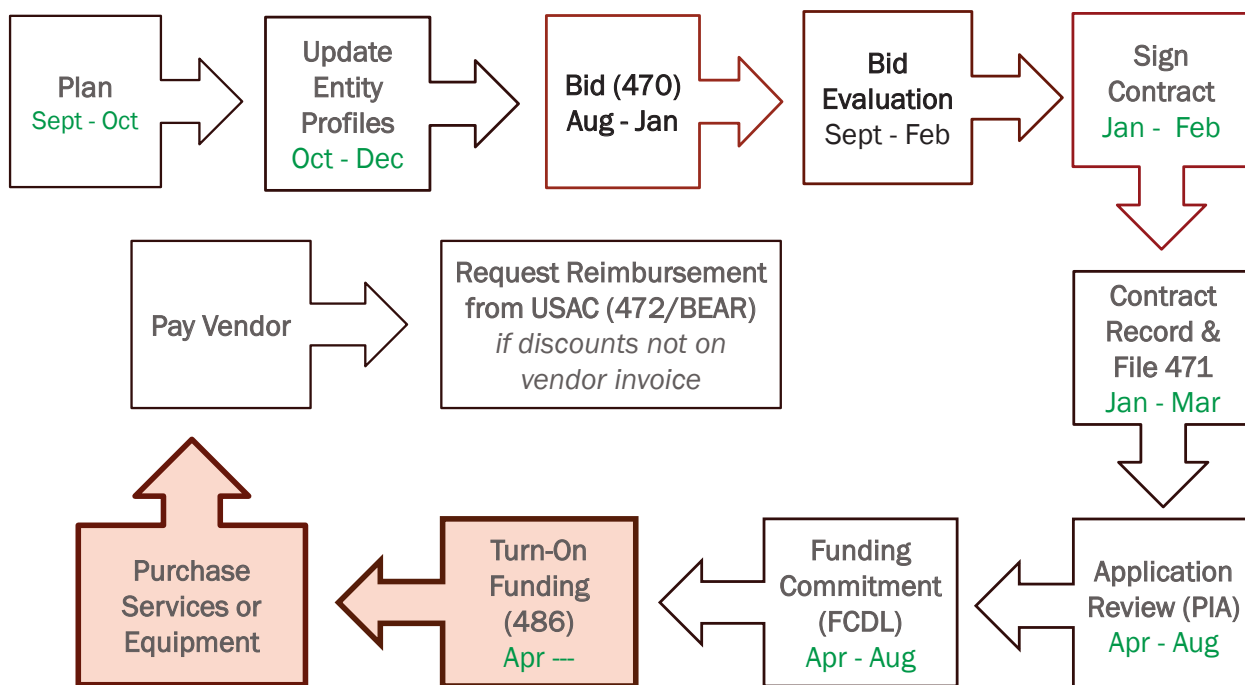


# Form 486

## Activating Services & Equipment

77

### Where we are:



78



# Form 486 – Turn on Funding

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- Purpose of Form
  - Signifies that it's OK for SLD to pay any invoices for that FRN
  - Certifies CIPA compliance
- Deadline: Must be certified by the later of
  - 120 calendar days after the Service Start Date featured on the Form 486 or
  - 120 calendar days after the date of the FCDL
- File in EPC
- USAC then send Form 486 Approval Letter to Vendor and Applicant
- Will be delivered electronically inside EPC

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## CIPA Requirements

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- Any school or library receiving either Category 2 or Internet access funding must:
  - Filter all Internet access
  - Have an Internet Safety Policy that addresses required elements
  - Policy must have been adopted after public hearing
  - Recipients only receiving telecommunications services are exempt from E-rate CIPA compliance
- Consortium members submit Form 479 to consortium leader certifying compliance so consortium lead can submit Form 486
- New CIPA requirement for off-campus hot spots
  - see 11/13/2024 webinar materials

80

# CIPA Requirements for Schools' Online Safety Education

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- Schools' (not libraries) Internet Safety Policies must include "... educating minors about appropriate online behavior, including interacting with other individuals on social networking websites and in chat rooms and cyberbullying awareness and response."
- This means that schools are required to teach online safety to students as a prerequisite to receiving E-rate funding
- Local boards determine delivery of online safety/cyberbullying education
- Must be memorialized in board approved policy after providing opportunity for public input

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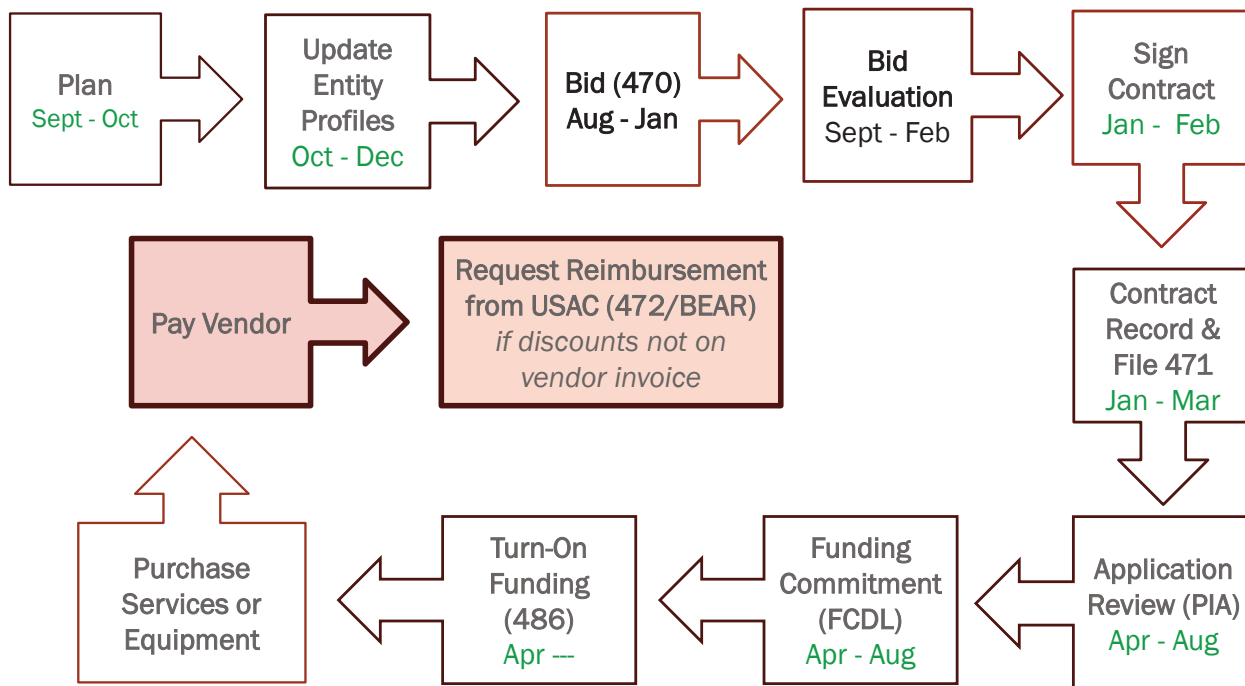


## Receiving E-rate Funding

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DISCOUNTED BILLS OR  
REIMBURSEMENTS

## Where we are:



83

## Receiving Your E-rate Discount Funding

- Applicant has a choice
  - Discounts on bills (vendor invoices USAC) or
  - Reimbursement process (Applicant pays bills in full, then invoices USAC)
- Must select one option for each funding request
- If you want discounted bills, notify vendor of your preference on Form 470 and when you file Form 471
- File Form 486 as soon as you are funded
- Obtaining discounts is NOT automatic
- Vendors sometimes have additional forms to complete to implement discounted billing

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# Discounted Billing Method

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- Discounts appear on Applicant's bill
- Service provider submits Form 474 to USAC after providing discounted bill
  - Service Provider Invoice Form (SPIF)
- Providers usually get reimbursed by USAC within 30 days from date of submission
- Applicants do nothing except make sure they are receiving the discounts they deserve on bills

85

# Reimbursement Method - BEAR

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- Applicant pays bill in full
- Applicant submits Form 472 – BEAR Form for reimbursement
- Monthly, quarterly, semi-annually, or at end of year
- Calculated based on eligible charges on actual bills
- Strictly Enforced Deadline
  - October 28 (following close of funding year) for recurring services
  - January 28 for non-recurring services/equipment

86

# Paying Your Share

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- Applicants are required to pay non-discounted portion of cost
- Cannot be waived by the vendor
- Vendor cannot provide a “grant”
- Funding must be in budget or draft budget
- Must keep all invoices and copies of cancelled checks for 10 years after last day to receive service

# Gift Rule Restrictions

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- All gifts from service providers to applicants are prohibited
  - except for:
  - Modest refreshments that are not offered as part of meal (e.g., coffee and donuts provided at a meeting) and items with little intrinsic value intended for presentation (e.g., certificates and plaques); and
  - Items that are worth \$20 or less (e.g., pencils, pens, hats, t-shirts, and other items worth less than \$20, including meals), provided those items do not exceed \$50 per employee from any one source per funding year

# What Exactly is a Gift?

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- Gratuity, favor, entertainment, loan, discount, hospitality or any other thing of monetary value
- Includes services as well as gifts of training, transportation, local travel, lodgings and meals, whether provided in-kind by purchase of a ticket, payment in advance or reimbursement after the expense was incurred

# Charitable Contributions

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- Service Providers can continue making charitable donations to E-rate eligible entities in the support of schools – including, for example, literacy programs, scholarships, and capital improvements – except if:
  - The gift is made to influence the competitive bidding process & increase need for E-rate funding

# Community Use of Services

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- Schools may but are not required to permit general public to use the schools' Internet access during non-operating hours – at the school
- Usage is permitted only during a school's "non-operating" hours or summer
- School may not request E-rate funding for a higher level of service than would be required for educational purposes
- Schools may not charge for the use of the Internet access, but may charge reasonable fees to cover overhead costs from individuals that use the schools' services and facilities
- Organizations using a schools' services are permitted to recover related costs (e.g., "curriculum development and presentation costs") from attendees

# Community Use of Services

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- Internet filtering rules must remain intact during use
- Rule in no way permits schools to share their bandwidth with other ineligible entities, such as an off-site after-school program at the YMCA or community center
- Also does not permit partially eligible entities, such as a Diocesan office that provides services to both schools and the church, to stop cost allocating the ineligible portion of Internet used during school hours

# Document Retention

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- Documents relating to E-rate must be retained for 10 years from the last date to receive service or service delivery deadline, whichever is later
- For multi-year contracts, contract documentation and bids must be kept from 10 years from the last date of service under the contract
- Alert business office that vendor bills must be kept for 10 years from the end of the funding year
- Electronic records storage is permissible

**Questions?**

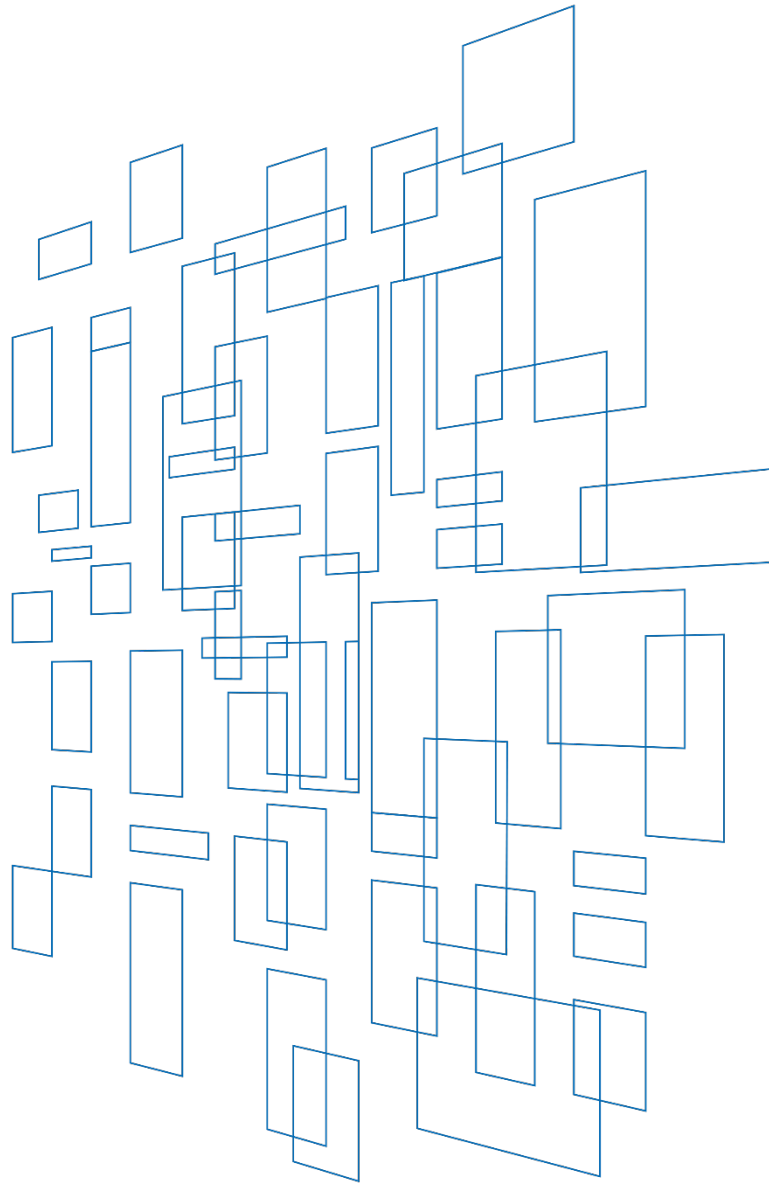
**Thank you!**

**Debra Kriete**

**[dmkriete@comcast.net](mailto:dmkriete@comcast.net)**

**717 232 0222**





# Schools and Libraries (E-Rate) Program Overview

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## Program Overview

The Schools and Libraries (E-Rate) Program provides discounts to assist [eligible schools and libraries](#) to obtain affordable Internet access and telecommunications services. E-Rate funds the following service types: Data Transmission Services and/or Internet Access, Internal Connections (IC), Managed Internal Broadband Services (MIBS), and Basic Maintenance of Internal Connections (BMIC). Discounts range from [20-90 percent of the costs of eligible services](#), depending on the level of poverty and the urban/rural status at the school district level. Eligible schools, school districts, and libraries, may apply individually or as part of a consortium. Starting with Funding Year (FY) 2019, voice services are no longer eligible.

The E-Rate Program supports connectivity, which is the conduit or pipeline for communications using telecommunications services or the Internet. The E-Rate Program also supports services and equipment needed for broadband connectivity **within schools and/or libraries** and services and equipment needed to bring broadband **into** and provide it **throughout** schools and libraries. The school or library is responsible for providing resources such as the end-user equipment (computers, tablets, telephones, etc.), software, professional development, electrical capacity, and the other elements that are necessary to effectively use the requested E-Rate eligible services and equipment.

The E-Rate Program is one of four universal service programs funded through the federal Universal Service Fund (USF). The Federal Communications Commission (FCC or Commission) appointed the Universal Service Administrative Company (USAC) as the permanent administrator of the USF and the universal service programs, including the E-Rate program.

Below is an overview of the requirements and processes for schools and libraries to apply for and receive E-Rate program discounts. This high-level overview is not intended to be a substitute for the FCC rules, form instructions, or other official guidance materials.

## Set Up an Organization Account in the E-Rate Productivity Center (EPC)

The E-Rate Productivity Center (EPC) is the account and application management portal for the E-Rate Program. EPC is the primary point of entry for E-Rate participants (e.g., applicants, consultants, and service providers). In EPC, applicants can complete and certify forms, obtain the status of their applications, submit requests, receive timely reminders and notifications, respond to USAC review questions, and ask program-related questions.

Learn more about EPC on the [EPC webpage](#). There, you'll find links to instructional videos, user guides, and more.

## The Eligible Services List

Each funding year, before the FCC Form 471 application filing window opens, the FCC releases an [Eligible Services List](#) (ESL) for the upcoming funding year. This list contains a description of the

products and services that will be eligible for discounts, along with additional helpful information such as eligibility conditions for each category of service for each specified funding year.

## Certify FCC Form 470 to Open Competitive Bidding for Desired Services

To begin the competitive bidding process, the applicant must complete and certify an FCC Form 470, Description of Services Requested and Certification Form, in EPC. The form notifies service providers that the applicant is seeking the products and services identified on the form and in the request for proposal (RFP), when applicable. “RFP” or “RFP document” can refer to any bidding document that describes the project and requested services in more detail than what the applicant provides on the FCC Form 470.

After the applicant certifies the FCC Form 470 in EPC, USAC issues an FCC Form 470 Receipt Notification Letter (RNL) in the applicant’s **News** feed. This notification provides important information, including the Allowable Vendor Selection/Contract Date (ACD) — the earliest date the applicant can select a service provider, execute a contract, and certify an FCC Form 471.

Before selecting a service provider, applicants must wait at least 28 days after the FCC Form 470 is certified in EPC and posted to the USAC website. Applicants must consider all bids received and must select the most cost-effective service offering using price of the eligible equipment and services as the primary factor. In addition to complying with the FCC’s competitive bidding requirements, applicants must also comply with all applicable state and local procurement rules and requirements.

- The FCC Form 470 **must** be completed by the entity that will negotiate with potential service providers.
- The FCC Form 470 cannot be completed by a service provider who will participate in the competitive process as a bidder. If a service provider is involved in preparing the FCC Form 470, and that service provider appears on the associated FCC Form 471, this will taint the competitive process and lead to a denial of funding requests.
- The FCC Form 470 applicant is responsible for ensuring an open and fair competitive bidding process and selecting the most cost-effective provider using the price of the eligible equipment and services as the primary factor.
- The applicant must retain all competing bids and other documentation to demonstrate compliance with the competitive bidding rules. All such bids must be retained for at least 10 years after the last date of service delivered.

If an applicant signed a multi-year contract in a prior funding year as a result of a posted FCC Form 470, they do not need to certify a new FCC Form 470 during the term of the contract. Instead, they can rely on the underlying FCC Form 470 and submit an FCC Form 471 to apply for discounts on the equipment and services provided under that multi-year contract.

## Submit and Certify FCC Form 471 to Seek Funding for Eligible Services

After selecting a service provider, the applicant is ready to request funding by filing the FCC Form 471, Services Ordered and Certification Form, during the FCC Form 471 application filing window each year. Once the filing window opens, the applicant can submit and certify the FCC Form 471 online in EPC. Applications that are not certified within the application filing window may not receive funding. Available funding is capped at just over \$4 billion per funding year, indexed for inflation.

Data provided by the applicant on the FCC Form 471 is used to calculate the discount percentage to which the applicant is entitled. In general, the E-Rate Program discount is based on the percentage of the local school district population eligible for the National School Lunch Program (NSLP) or by other alternative discount mechanisms available for schools that do not participate in NSLP or choose not to use NSLP figures, and the urban/rural designation of the entity. The FCC Form 471 also lists the individual funding requests, which must be separated by category of service, service type, and service provider.

- Schools and libraries are required to pay the non-discount portion of the services for which they receive discounts.
- Funding requests should be limited to the cost of eligible services that will be delivered to eligible entities for eligible purposes.
- There are a number of important certifications on the FCC Form 471. Applicants should be sure they can truthfully and correctly make these certifications. USAC checks the accuracy of the applicants' certifications and denies funding if one or more of the certifications are determined to be untrue. False statements on the FCC Form 471 (and other FCC forms) can result in civil and/or criminal liability.
- The FCC Form 471 must contain detailed information about the equipment and services ordered so that USAC can verify eligibility.
- The FCC Form 471 Receipt Acknowledgment Letter (RAL) issued in EPC after the form is certified provides important information to the applicant and the service provider, including a link to the data from the FCC Form 471.
- Applicants should only seek discounts for equipment and services on the FCC Form 471 if they were included on an FCC Form 470 (i.e., they were competitively bid).

## Receive Funding Commitment Decision Letter (USAC's Decision on Funding Requests)

After the FCC Form 471 is certified, USAC reviews the data on the form to verify that the data on the funding requests are accurate and compliant with E-Rate Program rules. Once USAC has reviewed the FCC Form 471, it issues one or more Funding Commitment Decision Letters (FCDLs) in EPC to both the applicant and the service provider(s), setting forth its funding decision for each funding request.

## Submit and Certify FCC Form 486 to Report the Delivery of Services

In order to ensure that USAC pays service providers only for services that have actually been delivered, the applicant submits and certifies the FCC Form 486, Receipt of Service Confirmation Form and Children's Internet Protection Act Certification Form. This form lists the service start date for each separate funding request for which the service provider has begun to deliver services and certifies the applicant's compliance with the Children's Internet Protection Act (CIPA).

Applicants who have confirmed that they will begin to receive services in July of the funding year may be able to certify the FCC Form 486 early (on or before July 31 of the funding year) if it meets certain requirements.

USAC may adjust the service start date and reduce the funding commitment if the form is certified after the FCC Form 486 deadline (see below). Also, non-compliance with the CIPA requirements may result in a funding denial or recovery of disbursed E-Rate funds.

## Complete Invoicing (FCC Form 472 or FCC Form 474) to Request Reimbursement

USAC must receive an invoice to pay the discount amount on services for which funds have been committed.

It is the applicant's choice on which invoice method is used:

- Service Provider Invoice (SPI) method – If applicants receive discounted bills from service providers, the service providers must submit the FCC Form 474, Service Provider Invoice (SPI) Form, to receive payment for the discounts they have provided.
- Billed Entity Applicant Reimbursement (BEAR) method – If applicants wish to request reimbursement for services for which they have already paid in full, they must submit the FCC Form 472, Billed Entity Applicant Reimbursement (BEAR) Form. Before an applicant can submit the FCC Form 472, the applicant must have certified — and USAC must have reviewed and approved — an FCC Form 498, Service Provider and Billed Entity Identification Number and General Contact Information Form, to provide banking information for reimbursements.
- The invoicing entity (applicant or service provider) must also obtain and maintain a Unique Entity Identifier (UEI) available through [SAM.gov](https://sam.gov). This identifier is used by the federal government to make E-Rate disbursements.
- Before invoicing for either the BEAR or SPI, service providers are required to complete the FCC Form 473 Service Provider Annual Certification (SPAC) Form for each year they participate in the E-Rate program.

The billing method for each funding request is based on the first type of invoice USAC processes for payment. Payment will not be made on an FCC Form 472 or an FCC Form 474 submitted after the invoice deadline (see below). Receipt of reimbursements completes the application process.

## Appeals

If an applicant or service provider wishes to appeal a USAC decision, they must first file an appeal with USAC to seek review of the decision before filing an appeal with the FCC.

Parties must submit their appeal to USAC in EPC no later than 60 days after the date of USAC's decision letter or action. After USAC has reviewed the appeal and issued a decision, a party may appeal USAC's decision to the FCC if they still disagree.

Parties seeking a waiver of FCC rules (i.e., late payment fees, waiver of form or invoice deadlines, etc.) must file a waiver request directly with the FCC. USAC cannot waive FCC rules. See the [E-Rate Appeals Waiver Guide](#) for more information.

## Other Forms

There are several actions that may be required outside of the regular application process. Listed below is additional information on these actions. The applicant must initiate changes involving applicant forms.

The applicant can submit an [FCC Form 500](#) (Funding Commitment Adjustment Request Form) to make the following requests:

- To adjust the funding year Service Start Date (SDD) reported on a previously filed FCC Form 486
- To adjust the contract expiration date listed on the FCC Form 471
- To cancel a Funding Request Number (FRN)
- To reduce the amount of an FRN
- To request a service delivery extension for non-recurring services

A [Service Substitution](#) request can be submitted by the applicant to substitute a piece of equipment or service for another that provides the same or similar functions. Service providers can initiate the request if they are no longer offering the specific piece of equipment or service but are offering a replacement. This is considered a [“global” service substitution](#).

In certain situations, applicants and service providers can request a change of the Service Provider Identification Number (SPIN). This is known as a [SPIN Change](#).

- An Operational SPIN Change is a decision made by the applicant to change their service provider. Restrictions may apply.
- A Corrective SPIN Change is when a service provider corrects data entry errors, or a service provider consolidates SPINs after a merger or acquisition. Applicants can use a corrective SPIN change to provide the correct SPIN.

## Retention of Records and Audits

Program participants must maintain all E-Rate program [records](#) 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, whichever is later, to be in compliance with program rules. The records must be made available if requested for audits or other inquiries or investigations.

## How to Get More Information

All of the material covered in this overview is available on USAC's website at [USAC.org](https://usac.org).

You can obtain specific information on completing the individual forms by reviewing our training materials including the new E-Learning Modules (eLM's) and EPC User Guides on our [Video's page](#).

Our [Webinars](#) page includes recordings and slides covering things such as program updates, new rules and orders to E-Rate, guidance about compliance and filings, stakeholder support, and more.

You can also subscribe to our [E-Rate News Brief](#). The E-Rate News Brief will give you information about upcoming program deadlines, tips to help you through the application process, and other timely information.

The Customer Service Center can answer your questions by telephone at (888) 203-8100, weekdays from 8 a.m. to 8 p.m. Eastern Time, or you can submit your questions by creating a customer service case in EPC.

## E-Rate Program Timetable and List of Deadlines

Form or Event	Deadline or Dates
Funding Year	July 1 through the following June 30 (Non-recurring services can be delivered and installed through September 30)
FCC Form 470 (Description of Services Requested and Certification Form)	Certified at least 28 days before the filing of the FCC Form 471, keeping in mind (1) the timeframe for compliance with all competitive bidding requirements and (2) the FCC Form 471 application filing window opening and closing dates
EPC Administrative Window	Closes just before the application filing window opens (Exact dates for each funding year will be posted on the website)
FCC Form 471 (Description of Services Ordered and Certification Form) Application Filing Window	Period when applicants can submit and certify FCC Form 471 for a funding year. Forms must be certified no later than 11:59 p.m. ET on the day of the closing of the FCC Form 471 application filing window (The exact date will be announced and posted on the Website each funding year)



FCC Form 486 (Receipt of Service Confirmation and Children's Internet Protection Act Certification Form)	Certified no later than 120 days after the date of the Funding Commitment Decision Letter or 120 days after the Service Start Date, whichever is later
FCC Form 498 (Applicant 498 ID)	Certified by the applicant and approved by USAC once for each of the billed entity's associated banking account(s) before an applicant can receive reimbursements via the BEAR method
FCC Form 472 (Billed Entity Applicant Reimbursement (BEAR) Form)	Submitted no later than 120 days after the date of the FCC Form 486 Notification Letter or 120 days after the last date to receive service, whichever is later
FCC Form 474 (Service Provider Invoice (SPI) Form)	
Appeals	Submitted no later than 60 days after the date of USAC's decision letter
FCC Form 473 Service Provider Annual Certification Form (SPAC)	Submitted by a service provider every funding year service providers participate in the E-Rate program
FCC Form 500 (Funding Commitment Adjustment Request Form)	As soon as the applicant is aware of the need to change service providers and before the SDD
Service Provider Identification Number (SPIN) Change	As soon as the applicant is aware of the need to change service providers and no later than the last day to invoice for that FRN
Service Substitution	Submitted before the Service Delivery Deadline (SDD)
120 Day Invoice Deadline Extension	Submitted on or before the invoice deadline. The invoice deadline is whichever of the following is later: 120 days after the last day to receive service or 120 days after the FCC Form 486 Notification Letter date

\*All deadlines are moved to the next business day if the deadline falls on a weekend or federal holiday.

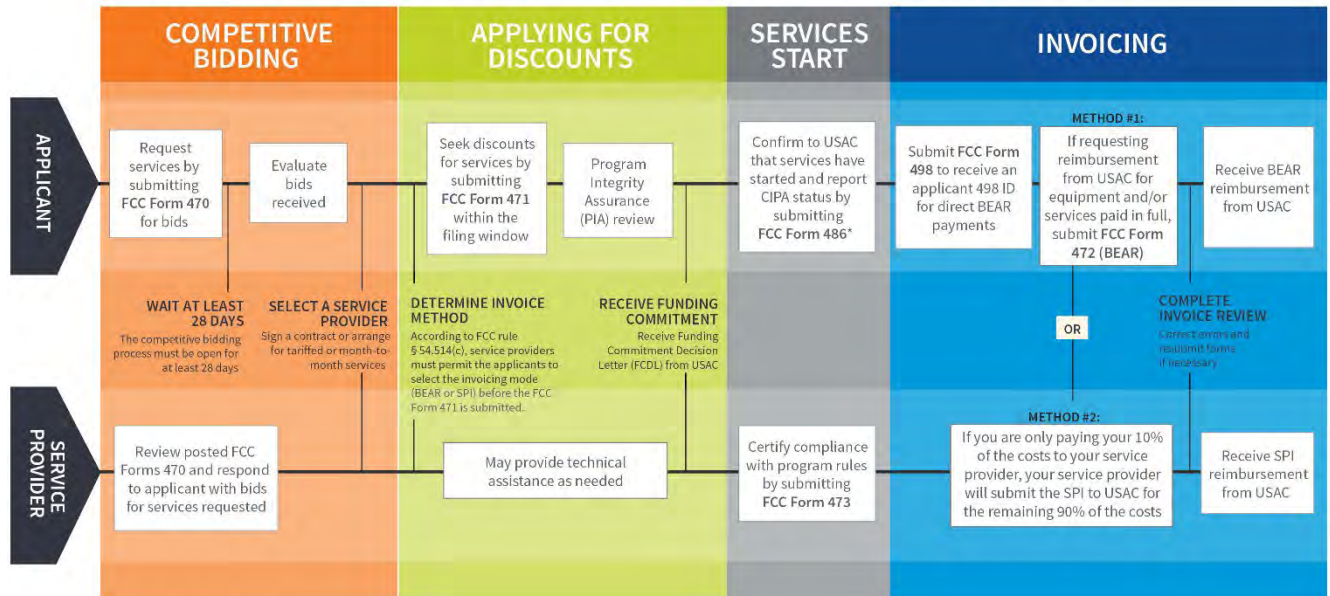


## Schools and Libraries (E-Rate) Program APPLICATION PROCESS

### BEFORE YOU BEGIN:

**APPLICANTS:** Applicants must first have an entity number and an E-rate Productivity Center (EPC) account.

**SERVICE PROVIDERS:** Service providers must first obtain a Service Provider Identification Number (SPIN /service provider 498 ID) by submitting FCC Form 498.



#### 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/sll](http://www.usac.org/sll)).
- **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 FC DL is issued, file the **FCC Form 500**.