



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
- 2nd 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

su appian

My Applicant Landing Page



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

[CREATE A NEW USER](#) [ADD OR REMOVE EXISTING USERS](#) [MANAGE USER PERMISSIONS](#)

[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

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Updating Entity Profiles

Category

Relationship Type

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



MANAGE ORGANIZATION

Summary

Modifications

Additional Information

Category Two Budget

Contracts

FCC Forms

News

Related Actions

Modify An Organization

Name *

Lawrence Primary School

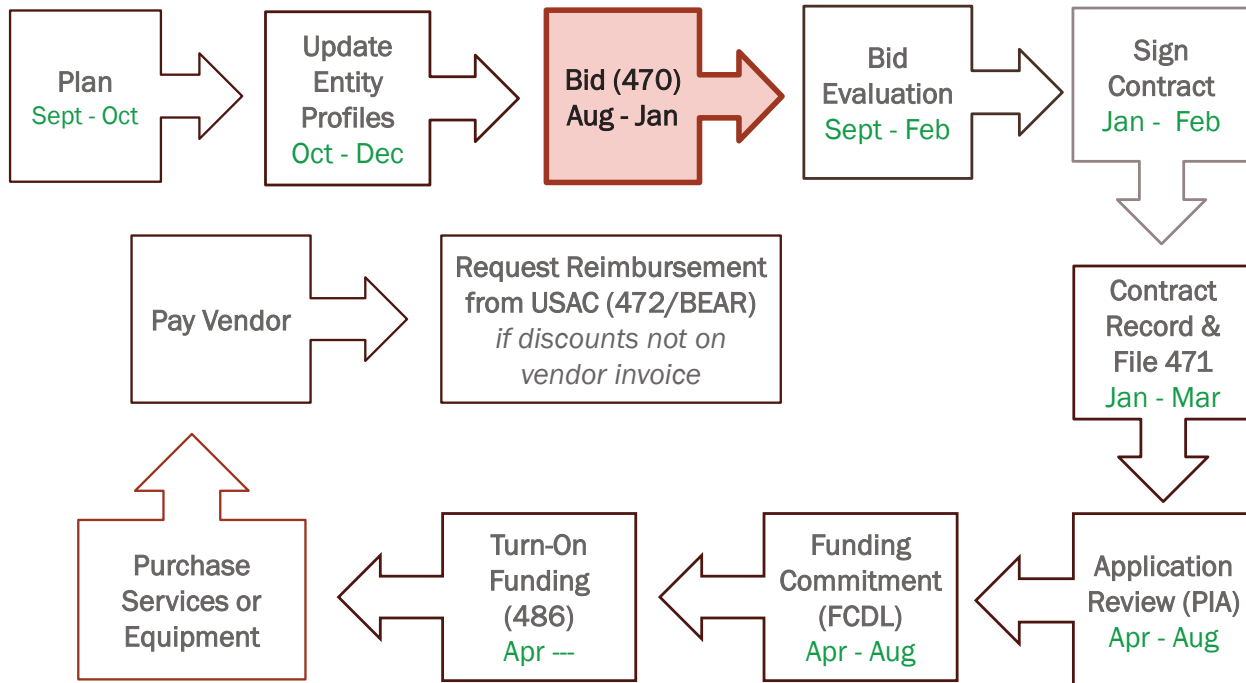
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Form 470 Bidding

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

- **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

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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

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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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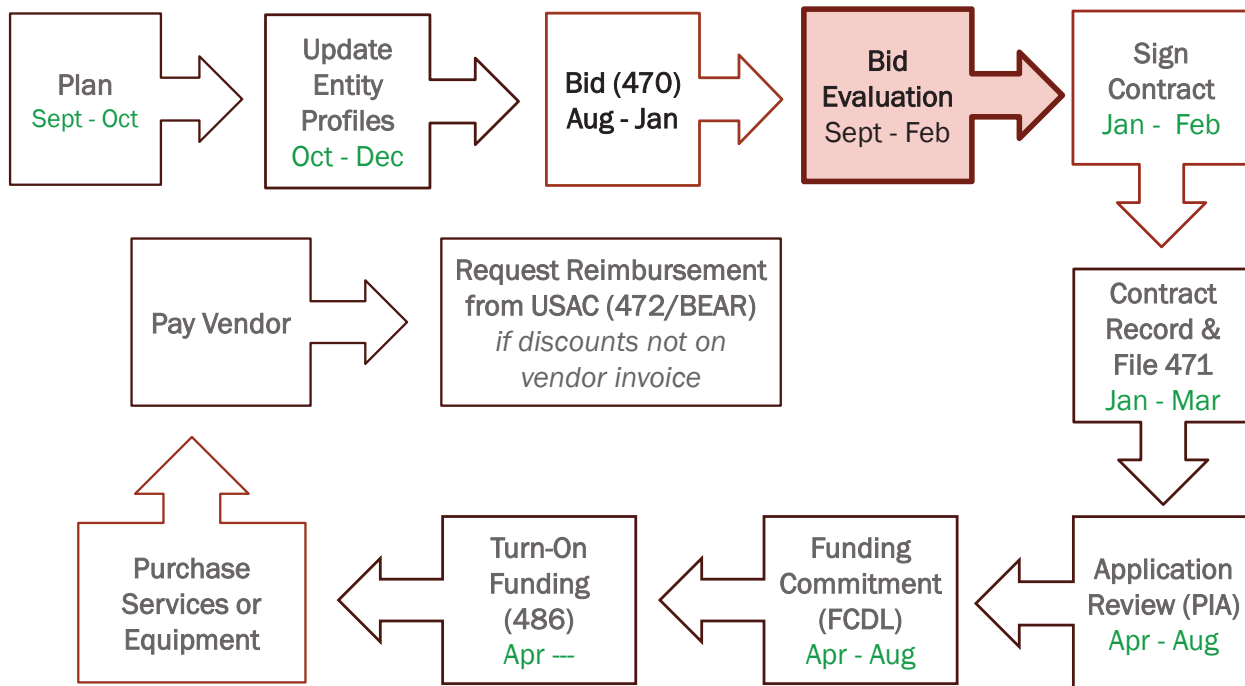
Open and Fair Bidding Required

- **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

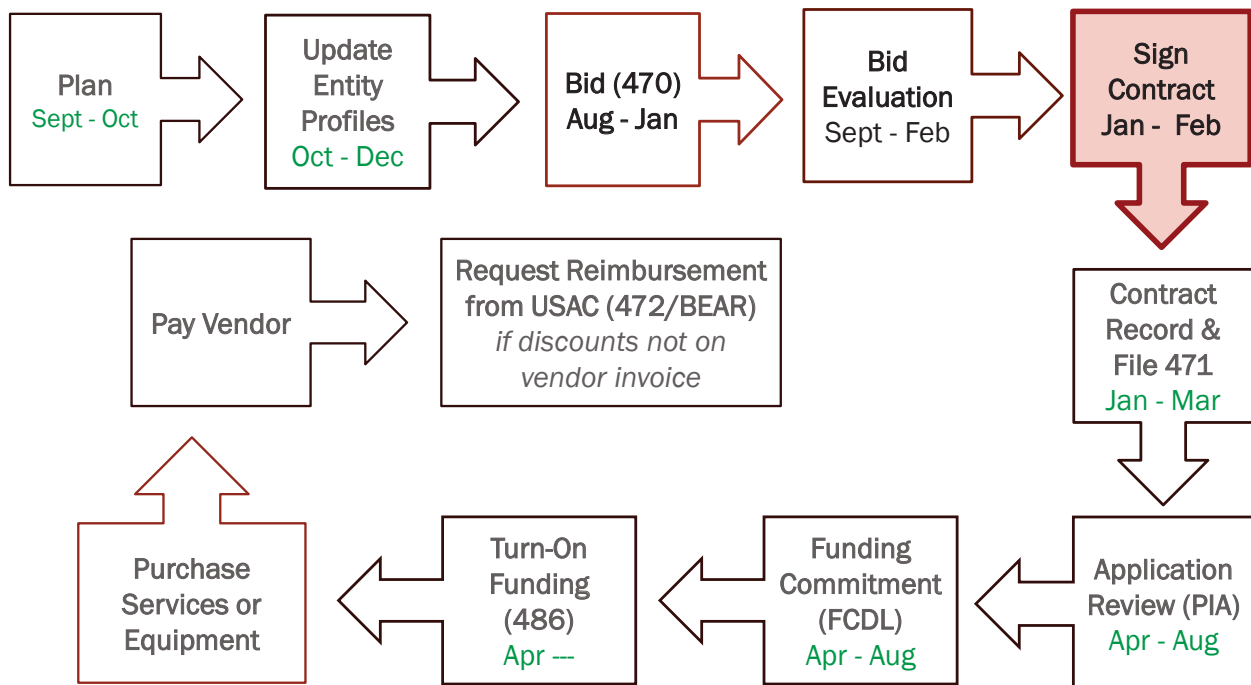
Factor	Maximum # Points
Price of the eligible products and services	50
Technical solution <i>(Equivalence, compatibility and interoperability of equipment with existing equipment)</i>	20
Ineligible cost factors <i>(Additional costs not paid by E-rate to implement solution)</i>	20
Management capability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

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Contracts

Where we are:



When **C1** Contracts are required

- 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

- 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

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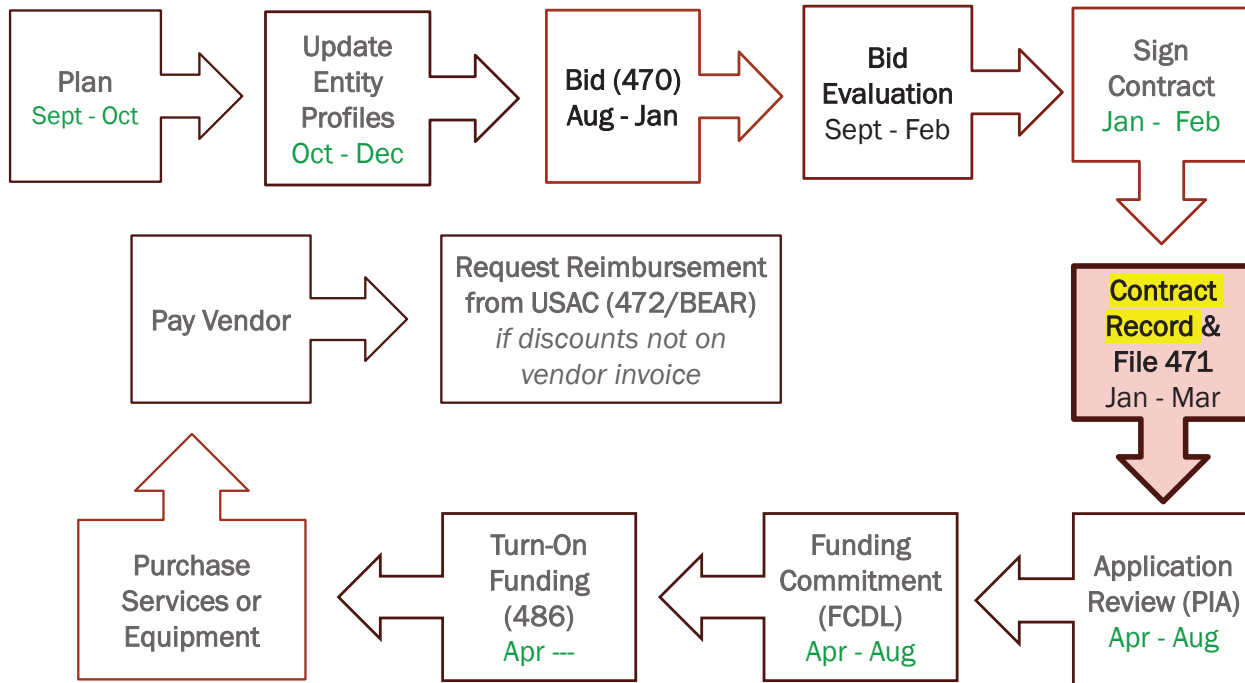
Contract Timing & Steps

- **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

Where we are:



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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.

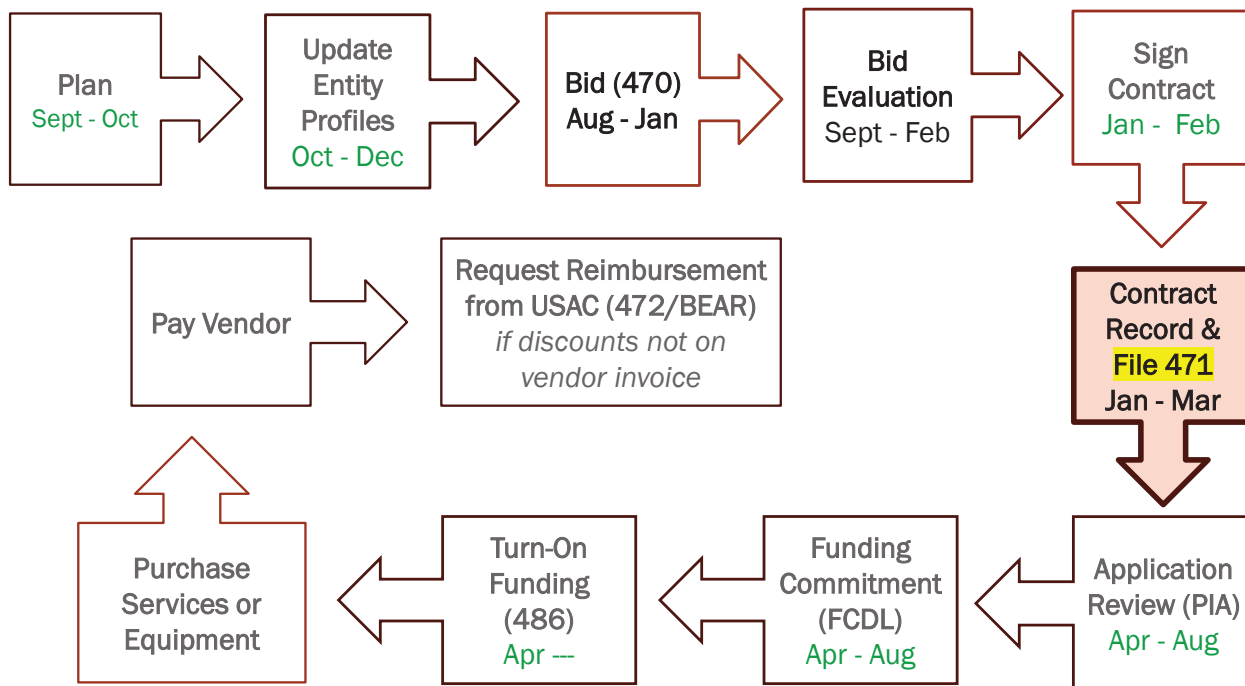
CLOSE **ADD A NEW CONTRACT** EDIT DELETE

Click on the “Add a New Contract” button



Form 471 Application

Where we are:



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Overview

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

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When and How Many to File

- 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

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Funding Requests

- 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

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How to Prepare Form 471

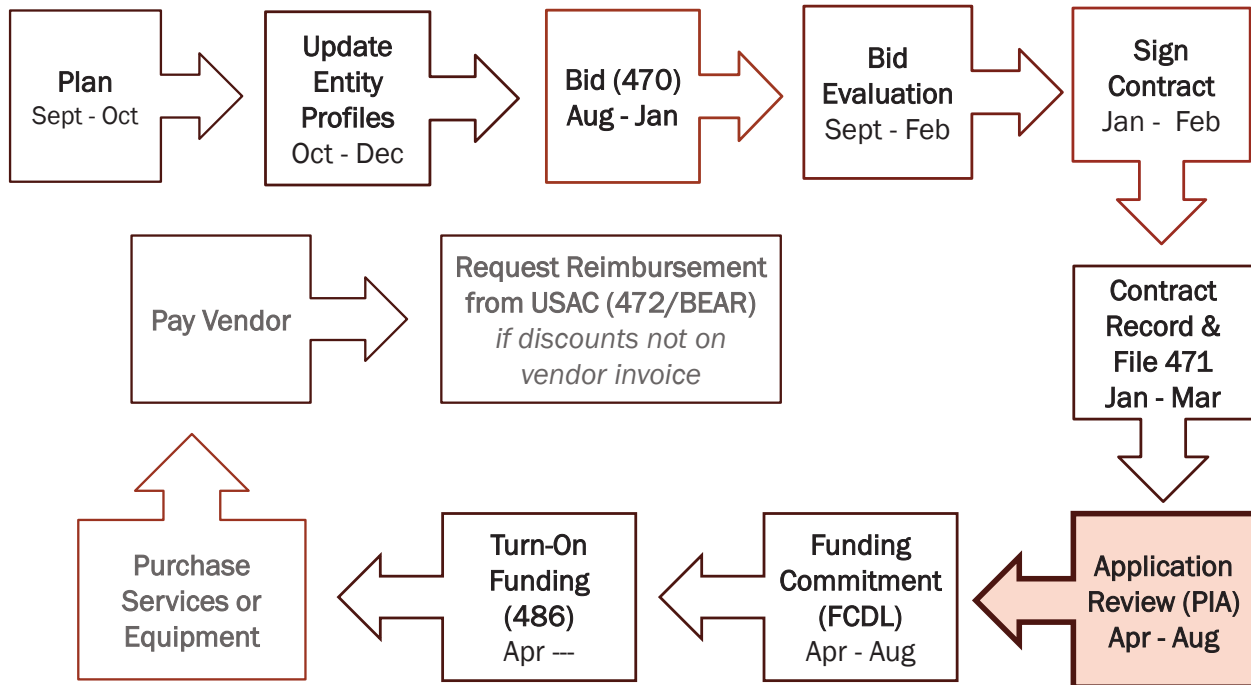
- Need to quantify prediscount amount
- Quantify and itemize ineligible costs
- Use cost allocations if service/equipment has mixed eligibility
- Separate user guide will be sent to listserv in January

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Pre-funding Review (PIA)

Where we are:



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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

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Answering PIA Questions

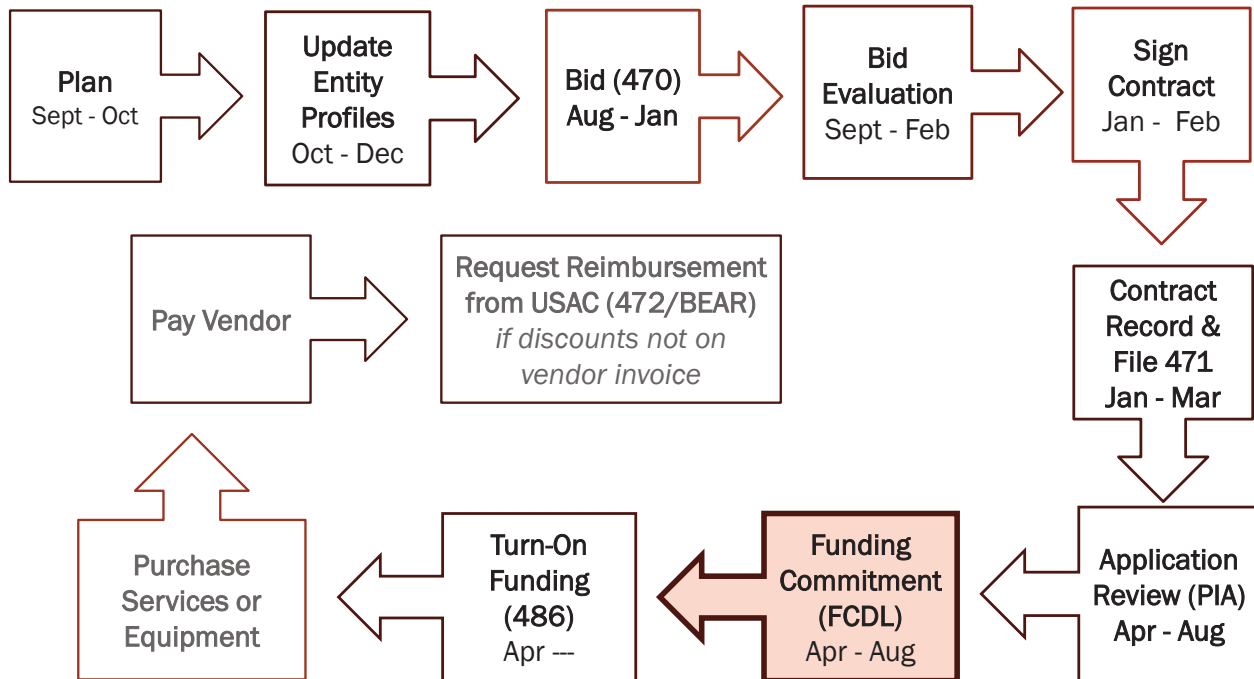
- 15-day response time, with a reminder on the 7th day
- Must respond in EPC and upload attachments if appropriate
- If you do not understand a question, email or call the reviewer and ask for clarification
- If you need more time, request a 7-day extension in EPC
- Do NOT ignore inquiries – potential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

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Funding Commitments

Where we are:



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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

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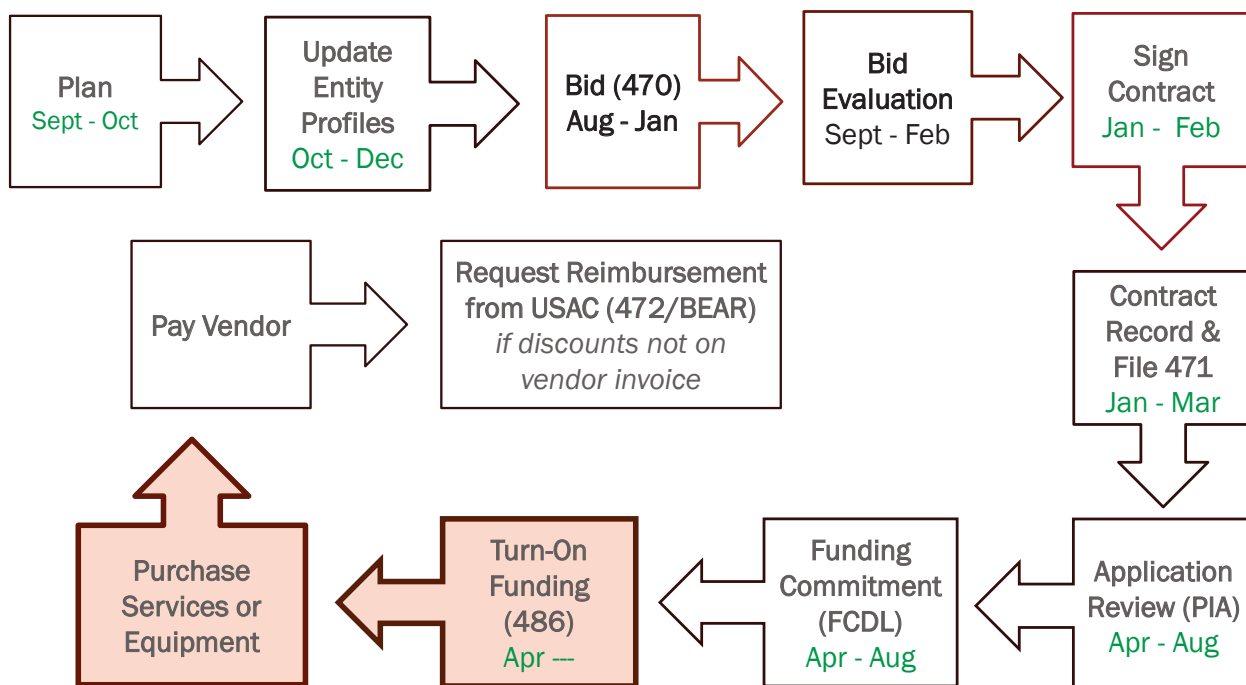


Form 486

Activating Services & Equipment

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Where we are:



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Form 486 – Turn on Funding

- 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

- 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

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CIPA Requirements for Schools' Online Safety Education

- 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

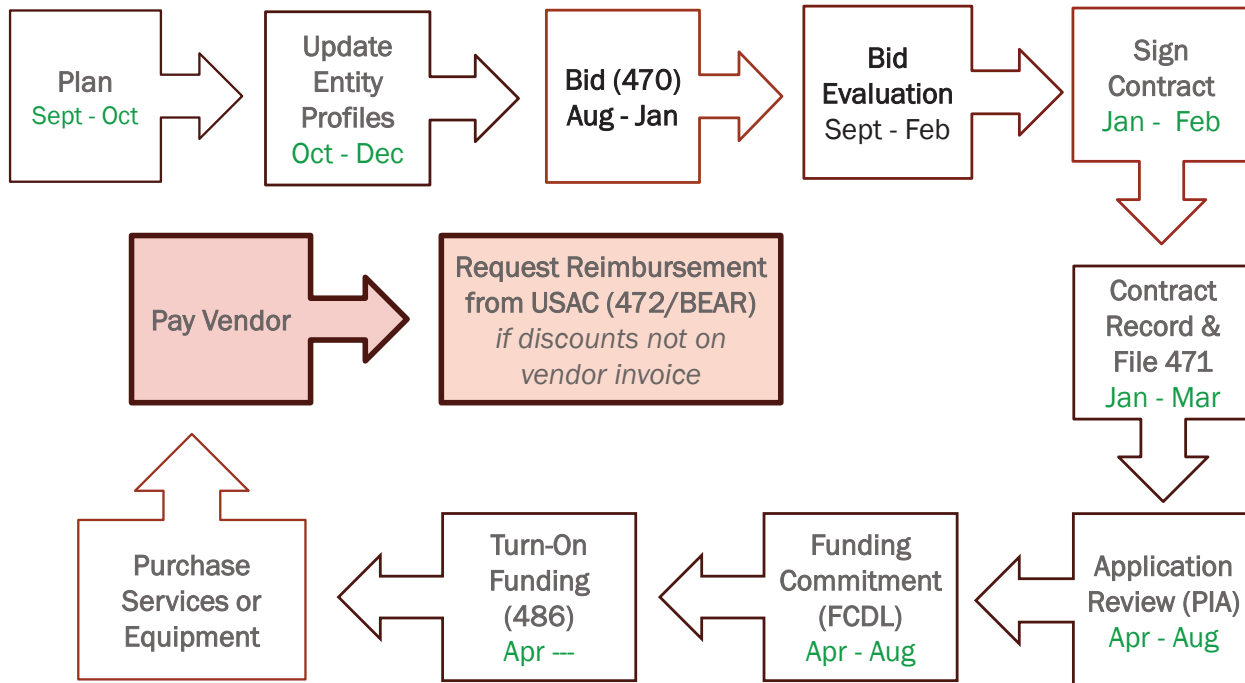
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Receiving E-rate Funding

DISCOUNTED BILLS OR
REIMBURSEMENTS

Where we are:



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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

- 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

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Reimbursement Method - BEAR

- 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

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Paying Your Share

- 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

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Gift Rule Restrictions

- 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

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What Exactly is a Gift?

- 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

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Charitable Contributions

- 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

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Community Use of Services

- 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

- 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

- 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

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Questions?

Thank you!

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