

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-Guide-updated-2025.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/mailinglist/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

* * *

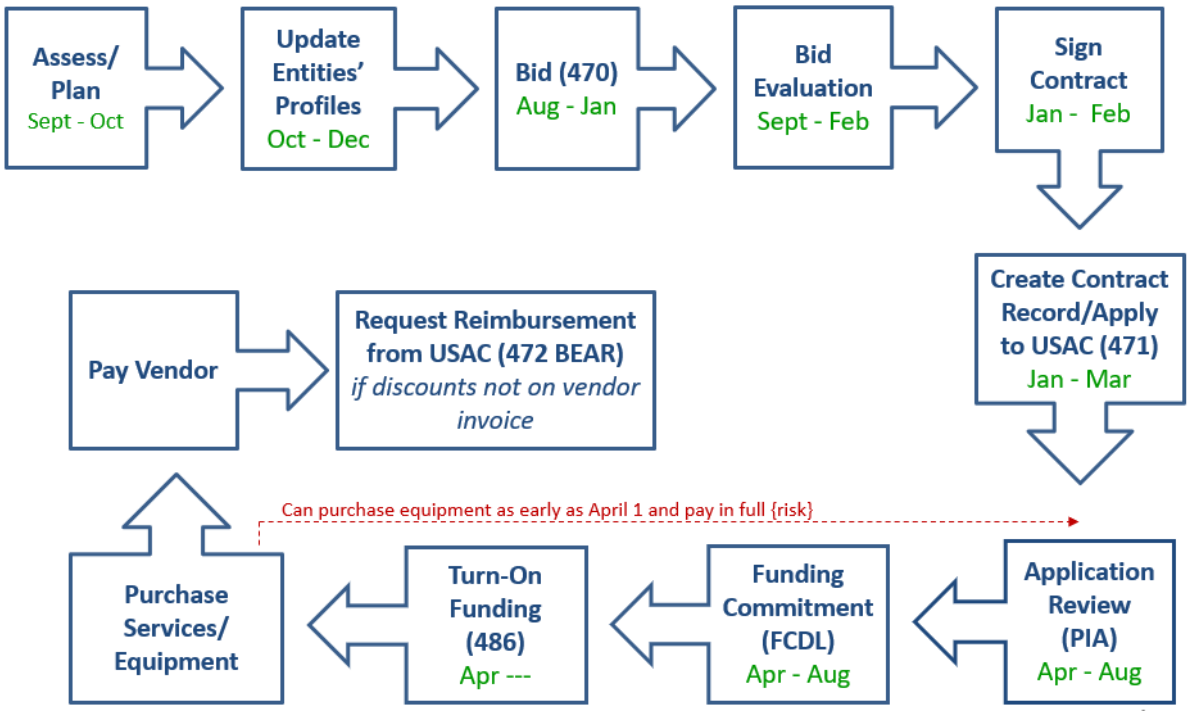
Upcoming Funding Year: FY 2027

Service period is July 1, 2027 through June 30, 2028 for circuits and internet

Service period is April 1, 2027 through September 30, 2028 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 2027 begins July 1, 2027; therefore, the application process technically begins in July 2026, although most applicants begin their planning and forms filings in earnest in the fall of 2026.

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 2026 – Early January 2027:

- 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 opened on October 21, 2026 is typically open until mid-January a few days before the Form 471 filing window opens.
    - 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.

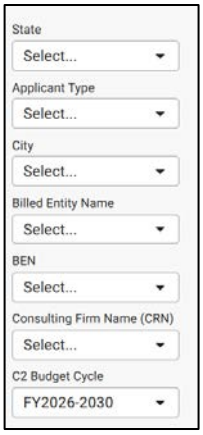
- To update enrollment and NSLP data during the Admin Window:

  > 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.

  USAC has a Category 2 budget tool that calculates each billed entity's Category 2 budget, and deducts any funds used from prior years during the budget cycle. The tool is at this link: https://opendata.usac.org/E-Rate/E-Rate-C2-Budget-Tool-FY2021-/8z69-hkn7

  The tool will ask you to enter information so the data can be filtered and your billed entity's information is provided in the results.



If you do not know your billed entity number, filter by state and your city. That should return results that includes your entity. If you enter the billed entity name, use just the district's or school's name and do not include "school district" or "school" because the words may be abbreviated in the E-Rate records and the results will not include your entity's name.

For example, the Sisseton School District's information is as follows:

Column N is the total five year prediscount budget for Category 2 purchases. Column O shows that it is still forecasted and has not yet been validated by USAC. Column R confirms that no funding was requested in FY 2026 and therefore the total budget remains available for FY 2027 – FY 2030

A	B	G	H	I	J	L	N	O	P	Q	R
BEN	**Billed Entity Name**	**C2 Budget Cycle**	**Child Entity Count**	**C2 Budget Algorithm**	**Full Time Students**	**School Student Multiplier**	**C2 Budget**	**C2 Budget Version**	**Funded C2 Budget Amount**	**Pending C2 Budget Amount**	**Available C2 Budget Amount**
134138	SISSETON SCHOOL DISTRICT 54-2	FY2026-2030	3	Per Site Basis School District	999	$201.57	$201,368.43	Forecast	$0.00	$0.00	$201,368.43

The Category 2 budget tool incorporates the following rules, and maximizes your C2 budget:

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.

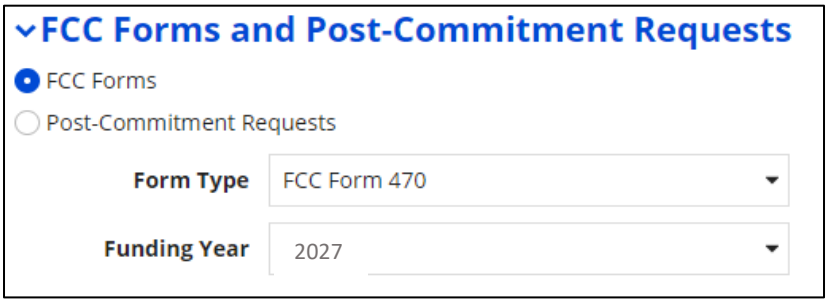
The budget cycle is a five-year cycle that runs from FY 2026 through FY 2030.

July 2026 (Typically Fall) – January 2027:

- 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 2027 – February 2027

- 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 2027 – March 2027:

- 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, 2027,** 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.

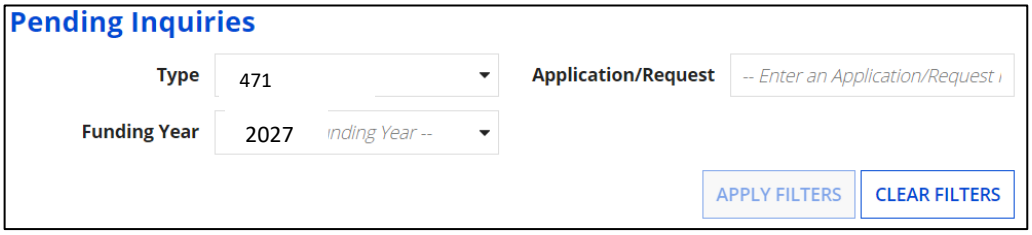


April 1, 2027 – September 30, 2028:

- 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.

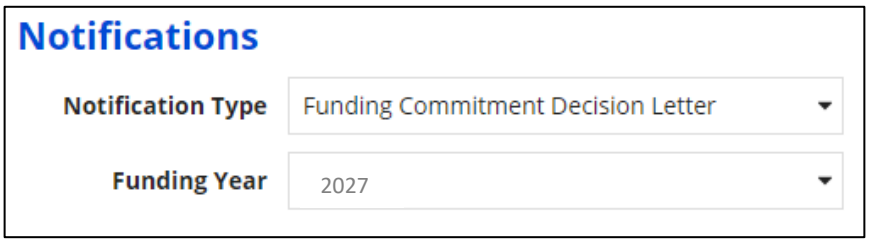
February 2027 – FCDL Date:

- 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.



Late April 2027 – September 2027:

- 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.



- 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.



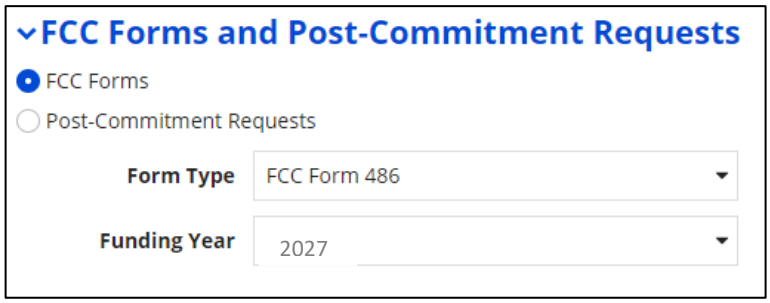
- Appeals to the FCC are submitted in the ECFS Filing System https://www.fcc.gov/ecfs/, listing Proceeding **02-6**.

FCDL Date – October 28, 2027:

- 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, 2027 – October 28, 2028:

- 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, 2028 for FY 2027 (4 months after the funding year has ended which is June 30, 2027). The Deadline to submit reimbursement forms for non-recurring items (generally Category 2 equipment/licenses) is January 28, 2028 for FY 2027 (4 months after the last date to purchase/install equipment which is September 30, 2027). 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 2026



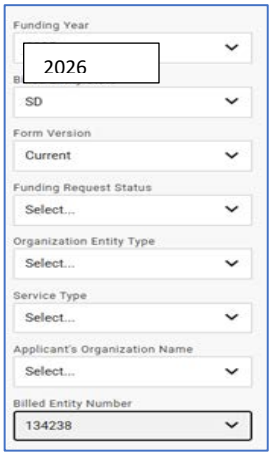
The "current" funding year would be considered the funding year for which you are currently receiving services, as opposed to the upcoming funding year for which you are applying. Funding Year 2026 is from July 1, 2026 – June 30, 2027 (September 30 for non-recurring purchases such as equipment). The 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.

Review USAC's Open Data FRN Status Tool for A Snapshot of Your FY 2026 Funding Requests

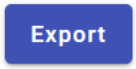
https://opendata.usac.org/E-Rate/E-Rate-FRN-Status-Tool-FY2016-/8xzh-ytkh

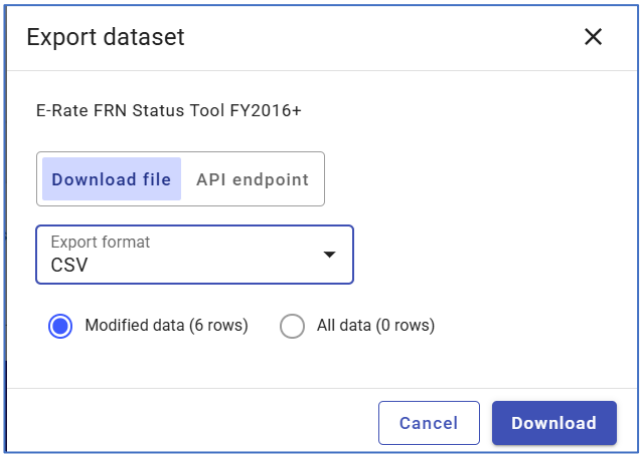
Use the filters on the right side of the tool to identify your organization's FRNs for FY 2026 (and other years). Suggested filters are:

- Select 2026 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."





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 2026 have FRNs that begin 26###).

- 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	G
Row	Form Version	Funding Year	Applicant's Organization Name	Billed Entity Number	Application Number	Funding Request Number	Funding Request Status
1	Original	2026	SD DOE	134238	261020927	2699027602	Pending
2	Original	2026	SD DOE	134238	261020927	2699027604	Pending
3	Original	2026	SD DOE	134238	261020927	2699027612	Pending
4	Original	2026	SD DOE	134238	261020927	2699029000	Pending
5	Original	2026	SD DOE	134238	261020927	2699029030	Pending
6	Original	2026	SD DOE	134238	261020927	2699029224	Pending

- 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 Y 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	Y	Z
Row	Contract Award Date	Extended Contract Expiration Date
1	1/21/2026	6/30/2031
2	1/31/2024	6/30/2029
3	1/31/2024	6/30/2029
4	1/31/2024	6/30/2029
5	1/31/2024	6/30/2029
6	1/31/2024	6/30/2029

- 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 #	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

Prior year's data is provided for illustration purposes, since the FY 2026 Form 471 has not yet been approved.

- 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.

- 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 for instructions on submitting an appeal to USAC to request that full funding be restored.

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

- Column BA shows whether the applicant has chosen the BEAR or SPI billing method to receive the E-Rate discount funding, when the FCC Form 471 application was submitted.
- 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.

BA	BB
Invoicing Mode	**Total Disbursement Amount**
BEAR	

- If the BEAR method was selected, this means that the applicant paid for the services in full and must submit a reimbursement form (the FCC Form 472 BEAR Form) to recoup the E-Rate discount funding.
- If the SPI method was selected, this means that the service provider should have reflected the E-Rate discount funding as a bill credit, and the service provider must submit a reimbursement form (the FCC Form 474 SPI Form) to recoup the E-Rate discount funding.
- If Column BB has no amount listed, this means that the reimbursement form has not yet been submitted or has been submitted but has not yet been processed by USAC.
- The deadline to submit reimbursement forms for recurring services (generally Category 1 services and Category 2 basic maintenance) for FY 2026 is October 28, 2027 (4 months after the funding year has ended which is June 30, 2027).
- The deadline to submit reimbursement forms for non-recurring items (generally Category 2 equipment/licenses) is January 28, 2028 (4 months after the last date to purchase/install equipment which is September 30, 2027).

- 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 BU.

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 2026 can be considered "complete."

* * *

Previous Funding Year: FY 2025



The "previous" funding year would be considered the funding year which ended June 30, 2026 (September 30, 2026 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 2026** funding requests instead of FY 2026. 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 2025.

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 2025 Reimbursement Deadlines

- The deadline to submit reimbursement forms for recurring services (generally Category 1 services and Category 2 basic maintenance) for FY 2025 is October 28, 2026.
- The deadline to submit reimbursement forms for non-recurring items (generally Category 2 equipment/licenses) for FY 2025 is January 28, 2027 (4 months after the last date to purchase/install equipment which is normally September 30, 2026).
- Applicants are permitted to request 1, 4-month reimbursement extension, and the extension request is required to be submitted within **15 days of the original reimbursement deadline**. To determine the exact deadline for each FRN, refer to Column **BU.**
- 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 2025 can be considered "complete."

EPC Administrative Window

The EPC Administrative Filing Window is the period during which applicants can make updates to their profile information in EPC to prepare for the upcoming FCC Form 471 application filing window. During the administrative window, applicants can update their student counts, National School Lunch Program (NSLP) participation rates, contact information, and request a C2 Budget recalculation.

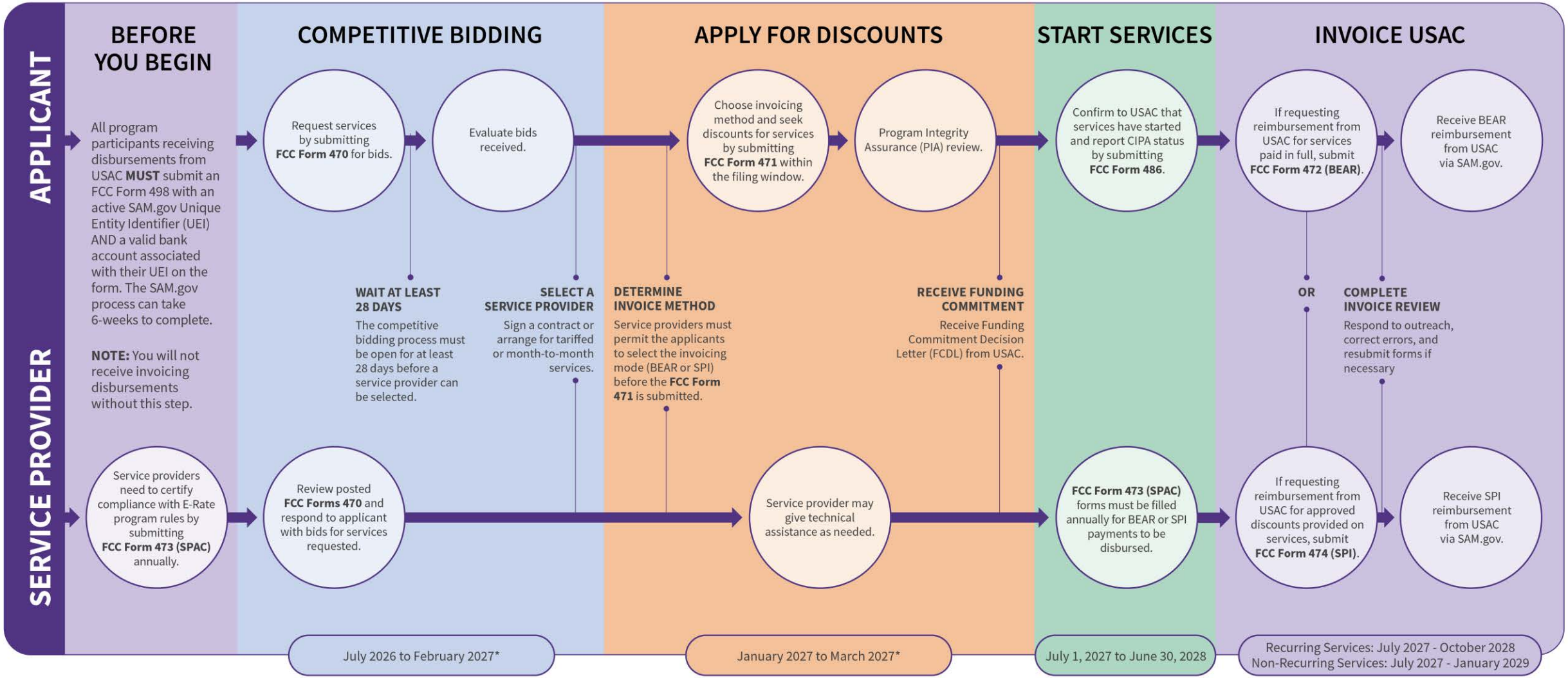
- **Existing EPC User Accounts** – The EPC Administrative Window is closed. You will not be able to make changes to your EPC profile when the administrative window is closed. If you need to modify some information in an entity profile when the profiles are locked, contact the CSC for further guidance.

The administrative window closes – and the applicant profiles are locked – shortly before the FCC Form 471 application filing window opens in January. The administrative window will open in October and will close in January.

Application Cycle Overview

The E-Rate FY2027 Application Process

To start the E-Rate Application Process, you MUST have access to the E-Rate Productivity Center (EPC) to submit forms. If you need assistance, reach out to the E-Rate Customer Service Center at (888) 203-8100.



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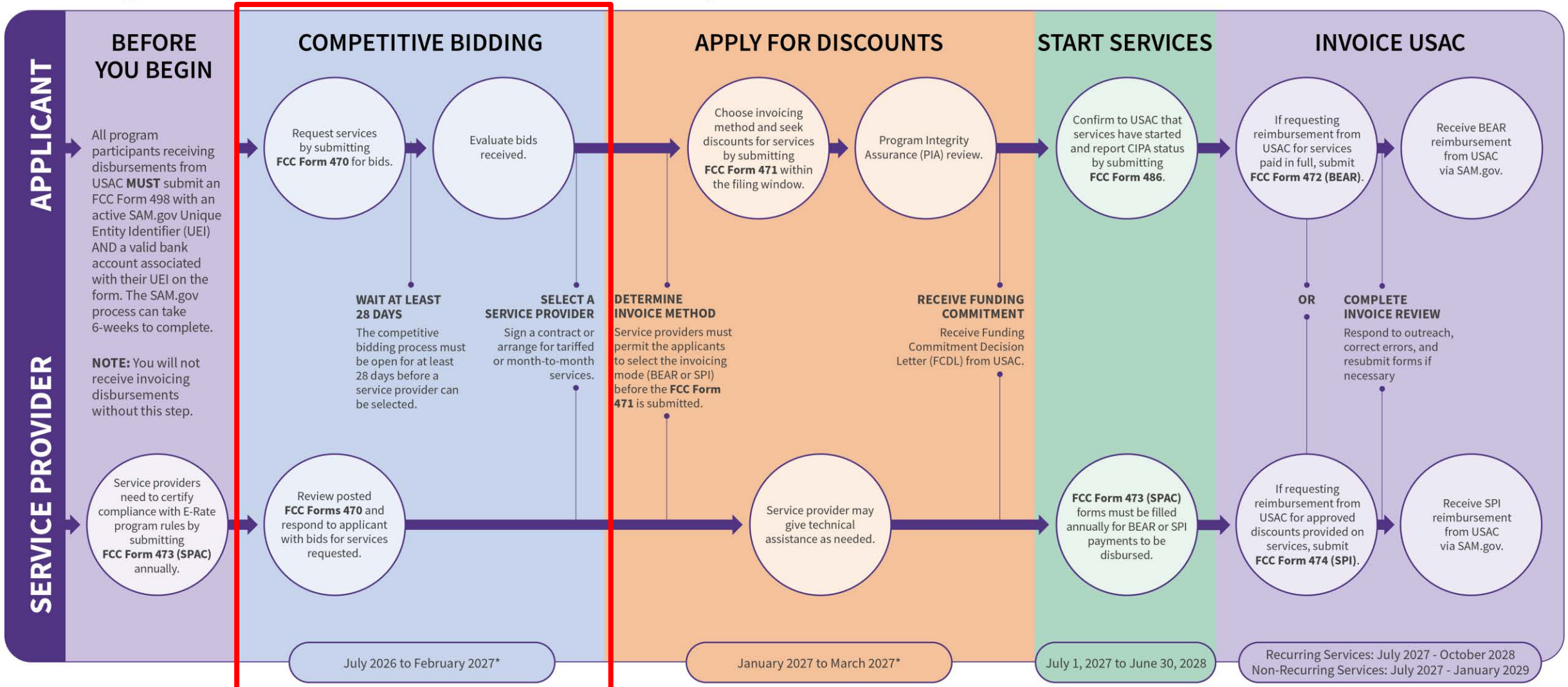
* Date ranges reflect a typical timeline and are subject to change.

Competitive Bidding Overview

FCC Form 470

What is the FCC Form 470?

To start the E-Rate Application Process, you MUST have access to the E-Rate Productivity Center (EPC) to submit forms. If you need assistance, reach out to the E-Rate Customer Service Center at (888) 203-8100.



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

https://www.usac.org/about/sam-gov-uei-requirement/

Applicant Forms and Important Dates Reminder

Competitive Bidding → Apply for Discounts → Start Services → Invoice USAC

FY2025:
July 2024 – February 26, 2025

FY2026:
July 2025 – March 4, 2026

FY2027:
July 2026 – February 2027*

FY2025:
January 15, 2025 – March 26, 2025

FY2026:
January 2026 – April 1, 2026

FY2027:
January 2027 – March 27, 2027

FY2025:
July 1, 2025 – June 30, 2026

FY2026:
July 1, 2026 – June 30, 2027

FY2027:
July 1, 2027 – June 30, 2028

Recurring Services
FY2025: July 2025 – October 2026
FY2026: July 2026 – October 2027
FY2027: July 2027 – October 2028

Non-recurring Services
FY2025: July 2025 – January 2027
FY2026: July 2026 – January 2028
FY2027: July 2027 – January 2029

470 → **471** → **486** → **472 (BEAR)** OR **474 (SPI)**

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

What is Competitive Bidding?

- Competitive bidding is the formal process for applicants to choose the service providers who will provide the requested equipment and services.
- Service providers review the applicant's FCC Form 470 for requested equipment and services, any procurement requirements, and then submit bids.

Competitive Bidding Steps



THE COMPETITIVE BIDDING PROCESS

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



The process consists of five steps:

1 Get Ready to File
- Perform a needs assessment
- Review your state and local procurement rules
- Review the Eligible Services List

2 File and certify an FCC Form 470
- Provide sufficient information for potential vendors to provide a comprehensive bid (e.g., for managed internal broadband services specify the exact equipment/services to be managed)
- Potential bidders (service providers) cannot help you file FCC Form 470
- You have the option to submit a Request for Proposals (RFP) with your form
- There are competitive bidding exemptions for certain Category 1 and Category 2 (libraries only) equipment/services
- After you certify your FCC Form 470, USAC issues a Receipt Notification Letter (RNL) with your Allowable Contract Date (ACD) – the earliest date you can enter into an agreement or sign a contract

3 Ensure an open and fair process
- Provide any FCC Form 470, RFP and other information/updates in EPC for all potential bidders for at least 28 days
- "Open" means there are no secrets in the process and that all bidders know what is required of them
- "Fair" means that all bidders are treated the same and that no bidder has project information others do not.
- Abide by the Gift Rules

4 Wait **at least** 28 days before selecting a service provider
- The ACD (included on your RNL) is 28 days after the FCC Form 470 is **certified**
- The day you **certify** the FCC Form 470 is day 1. If the FCC Form 470 is certified on the 1st of the month, you may select a service provider **on or after** the 29th of the month
  - If you later **change the information** needed to respond to the bid, you must restart the 28 days
  - If you issue an RFP on a later date, you must restart the 28 days

* State or Local procurement rules may require a longer waiting period

5 Select a service provider
- Select a service provider after your ACD and before certifying the FCC Form 471
- Consider all responsive bids
  - Use a Bid Evaluation Matrix
  - Ensure price is the primary evaluation factor (highest weighted factor). Only the costs of eligible goods/services should be evaluated in this criterion
- Enter into a legally binding agreement and document selection date (after the minimum 28-day waiting period)
- Upload your legally binding agreements and contracts to EPC





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

Universal Service Administrative Co.

Publication Date: 8/19/2024

Available for Public Use

Link to Competitive Bidding Infographic:
https://www.usac.org/wp-content/uploads/e-rate/documents/resources/Competitive-Bidding-Infographic.pdf

File an FCC Form 470

- The applicant must file and certify an **FCC Form 470** to initiate the competitive bidding process.
  - Describe your desired services and requirements with sufficient specificity for service providers to be able to submit responsive bids.
  - No generic descriptions (e.g., all Digital Transmission Services).
  - You may also include additional bidding documentation such as a Request for Proposals (RFP) with your FCC Form 470.
    - RFP generically refers to any bidding document that describes the applicant's project and requested equipment and services in more detail.
  - Services requested on the FCC Form 470 and RFP **must** match.

When to File the FCC Form 470

- The FCC Form 470 must be filed every year for services provided under tariff, on a month-to-month basis, or for those seeking new services under contract.
- It must be filed **at least** 28 days before filing FCC Form 471.
  - Multi-year contracts: You **do not** need to file a new FCC Form 470 if the contract is still in effect and the costs/services are still within the terms of the establishing FCC Form 470 (but you do still need to file a new FCC Form 471 requesting E-Rate support each funding year).
  - After the contract's initial term is over, you will need to recompete the contract.
- Competitive Bidding Exemptions:
  - Category One: Low-Cost High-Speed Internet Access
  - Category Two: Low Cost Internal Connections (Libraries only)

Competitive Bidding Requirements

- If you are a first-time E-Rate applicant, you can receive services under an existing contract under limited circumstances described below.
  - You can remain with an existing contract if it is still the most cost-effective solution after posting an FCC Form 470, waiting 28 days, and evaluating bids (Kalamazoo Order).
  - More information available on the Selecting Service Providers page.
- Applicants need to have evidence (signed contract or written notification to your service provider) of a legally binding agreement in place before submitting the FCC Form 471.
- Applicants must carefully consider **all bids received** and then select the most cost-effective service offering, using price as the primary factor in the bid selection. Other factors may be used in the bid evaluation process, but price of the eligible equipment and services must be weighted most heavily.
- An applicant can still participate if only one bid or no bids were received.

Receipt Notification Letter (RNL)

- After posting FCC Form 470, USAC issues a Receipt Notification Letter (RNL) in your EPC News feed.
- **Review your submitted FCC Form 470 carefully**. If you need to make corrections, do the following:
  - For minor changes (see the Ministerial and Clerical Errors page on the E-Rate website), locate the form in EPC, and choose "Related Actions" to submit allowable corrections.
  - For significant changes to your form, you must **file a new FCC Form 470 or restart your 28-day waiting period**.
- The Receipt Notification Letter contains your Allowable Contract Date, which is 28 days after the certification date of your FCC Form 470.

State Master Contracts

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

Requesting Services: Requests for Proposals

- **Requests for Proposals (RFPs)** may be created to describe specific needs and circumstances in more detail.
- RFP documents are any documents that provide additional information to potential bidders on the scope or details of your project.
  - For most types of service requests, RFPs are not required.
    - However, you must issue an RFP for some requests or if you are required to do so by state, Tribal, or local rules.
    - In addition, RFPs are required for self-provisioned networks and dark fiber requests.
- Services on your FCC Form 470 and RFP must match.
- All RFPs and RFP documents must be attached to your FCC Form 470 in EPC.

What's New for FY2027 and Upcoming in FY2028

- **FY2027 Updates to the FCC Form 470**
  - Updated guiding language on the Category Two service selection screen
  - Ineligible service selection items have been removed (Bus Wi-Fi and Hotspots)
  - Additional manufacturer options are available
  - "Or equivalent" language is now a part of selecting "other"
- **FY2028 Bidding Portal**
  - "Beginning in funding year (FY) 2028, service providers will be required to respond to applicants' FCC Form 470 requests for services by submitting their bids into a Universal Service Administrative Company (USAC)-managed bidding portal, and applicants will be required to upload all bid evaluation and vendor selection documents, including contracts, to the portal after they select their service providers." FCC-26-30

Selecting Service Providers

Evaluating Bids

Open and Fair

- **Open** = there are no secrets in the process; information shared with one bidder must be shared with all.
- **Fair** = all bidders are treated the same, fairly, and equally.

See the Open & Fair Process page on our website for more information.



Create A Bid Evaluation Matrix

- To evaluate incoming bids, create a **bid evaluation matrix** or similar document.
- Develop evaluation criteria or factors to assess the bids.
  - You can have one or multiple factors.
  - You may also have disqualifying factors.
- Assign each evaluation factor a point value or percentage.
  - The price of the **eligible equipment and services** must be the most heavily weighted factor.
  - Other factors can be considered, but they must be weighted less than the price of eligible equipment and services.

Sample Bid Evaluation Matrix

Factor	Points Available	Vendor 1	Vendor 2	Vendor 3
Price of the eligible products and services	50*	20	50	40
Prior experience with the vendor	25	25	0	25
Prices for ineligible services, products, and fees	15	10	5	15
Local or in-state vendor	10	10	0	0
Total	**100**	**65**	**55**	**80**

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

Special Cases

- If you only receive one bid, you accept it if it's cost effective.
- If you receive zero bids, you may solicit bids.
- Duplicative (backup or redundant) services are not eligible for E-Rate support.
- Be sure to abide by our gift rules, which are in effect throughout the funding year.
- If you have any question on these issues, please Contact Us.

28-Day Waiting Period Review and Reminders

- Applicants must wait at least 28 days after certifying their FCC Form 470 before selecting a service provider, executing any contracts for contracted services, or signing and submitting an FCC Form 471. The allowable contract date is the earliest date on which an applicant can select a service provider. See your Receipt Notification Letter.
- Your state or local procurement regulations may require a longer waiting period or impose additional requirements.

28-Day Waiting Period Review and Reminders

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

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

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

- **When does the waiting period start?** *The calendar day **after** you certify your FCC Form 470, the day you certify is day one. For example, if you certify on 1/1/2026, the waiting period starts on 1/1/2026, and your Allowable Contract Date is 1/29/2026. If you add a Request for Proposals after certifying the FCC Form 470, you may be required to restart the 28-day waiting period.*
- **Do weekends count as a part of the 28 days?** *Yes, the 28-day period is based on calendar days.*
- **When can you select a vendor?** *After the 28-day waiting period (unless your FCC Form 470 lists a later bid deadline.)*
- **When's the last day you can select a vendor?** *You must select the most cost-effective service offering before you submit the FCC Form 471.*
- **When can you stop receiving bids?** *You may set a bid deadline and include it to your narrative or RFP. This deadline must be at least 28 days after verifying your FCC Form 470 or longer depending on state rules. If you **do not add a deadline to your narrative or RFP**, you must accept bids up until you evaluate bids and make a vendor selection. These deadlines should be memorialized in your records.*

Available for Public Use

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Allowable Contract Date (ACD) Infographic

CALENDAR

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	**Certified FCC Form 470** 1 Day 1	2 Day 2	3 Day 3	4 Day 4
5 Day 5	6 Day 6	7 Day 7	8 Day 8	9 Day 9	10 Day 10	11 Day 11
12 Day 12	13 Day 13	14 Day 14	15 Day 15	16 Day 16	17 Day 17	18 Day 18
19 Day 19	20 Day 20	21 Day 21	22 Day 22	23 Day 23	24 Day 24	25 Day 25
26 Day 26	27 Day 27	28 Day 28	**Allowable Contract Date** 29 Day 29	30	1	2

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

Remember

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

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

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

https://www.usac.org/e-rate/applicant-process/competitive-bidding/28-day-waiting-period/

Contracts

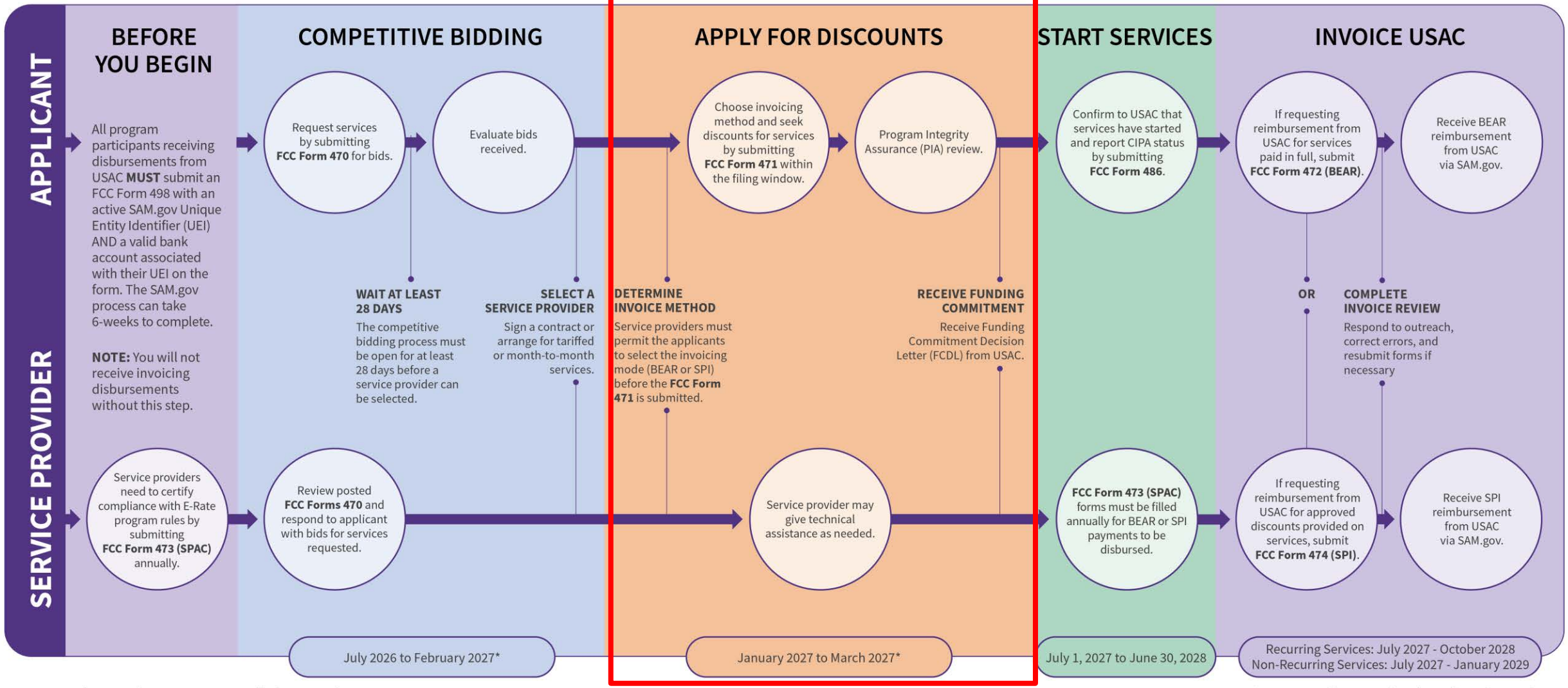
- Applicants must have a signed contract or other legally binding agreement in place and loaded in EPC **prior to submitting their FCC Forms 471 to USAC**.
- Applicant must not sign a contract before the Allowable Contract Date (ACD), which is 28 days after the FCC Form 470 is filed or the RFP is posted, whichever is later. For example, if you file your FCC Form 470 on January 1, you may select (sign a contract with) a service provider **on or after January 29**.
- **Signed contracts constitute the best evidence that a legally binding agreement exists and must not be signed before the minimum 28-day period is completed.**
- **A verbal offer and/or acceptance will not be considered evidence of the existence of a legally binding agreement.**
- Learn more on the State Master Contracts webpage.
- **Instructional Videos:**
  - How to Create a Contract Record (5:58 mins)
  - How to Create a Contract for Low-Cost High-Speed Internet (4:55 mins)

Applying for Discounts

Discounts are calculated and reported to USAC on FCC Form 471

What is the FCC Form 471?

To start the E-Rate Application Process, you MUST have access to the E-Rate Productivity Center (EPC) to submit forms. If you need assistance, reach out to the E-Rate Customer Service Center at (888) 203-8100.



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https://www.usac.org/about/sam-gov-uei-requirement/

FCC Form 471 Overview

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

Your FCC Form 470 and FCC Form 471 Must Match

- Your FCC Form 471 must only request equipment and services cited from the FCC Form 470.
- Applicants should ensure that all equipment/services being requested on the FCC Form 471 were competitively bid via the FCC Form 470.
- If you bid for two Category Two (C2) service types on your FCC Form 470 and invoice USAC for three C2 service types, this implies that additional information, other than what was competitively bid for, may have influenced the selection of service provider.
  - This discrepancy **cannot** be corrected after competitive bidding ends.
  - You are allowed to select all three service types on your FCC Form 470 if you are unsure of what service types will be provided.
  - To avoid a competitive bidding violation, if there is time before the FCC Form 471 deadline, you would need to recertify a new FCC Form 470 with the additional service type, wait an additional 28 days, and select a service provider **after** the updated 28th day.

Select How to Invoice on FCC Form 471

- Applicants select their invoice method (FCC Form 472 (BEAR) or 474 (SPI)) for each FRN when submitting their FCC Form 471.
- Applicants are encouraged to discuss their selection(s) with their service provider(s) before the application is submitted, but it is the **applicant's choice** prior to submission of the FCC Form 471 (47 CFR § 54.514(c))
- Mode Changes are made through the RAL process when submitted after completing their FCC Form 471 and before the FCDL is issued. Future EPC changes will be rolled out to allow applicants to change the invoicing mode through the FCC Form 500.
- FCC Form 471 eLearningModule (eLM) & User Guide

Common FCC Form 471 Application Errors

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

Eligible Equipment or Services: Key Reminders

- E-Rate Eligibility: Equipment or services may be partially eligible under E-Rate depending on the nature of the services and the Eligible Services List (ESL) for a particular year.
- Applicants are responsible for determining before filing FCC Form 471:
  1. Total Costs, and
  2. Ineligible portions

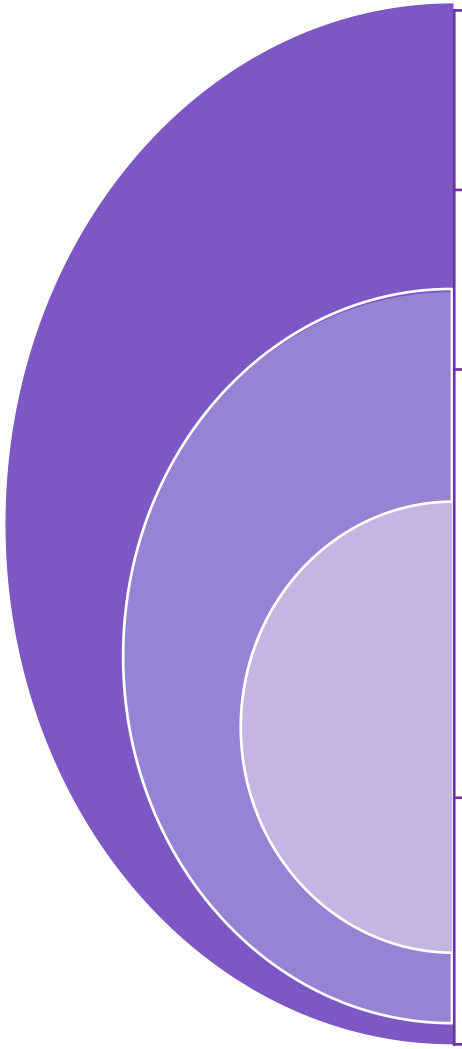
How To Determine

- Contact the manufacturer or Customer Service Center (CSC) to determine a particular equipment item or service's eligibility before submitting your FCC Form 471 to:
  - Determine eligibility under E-Rate, and
  - Confirm the category of service for that eligibility.

Funding Commitment Decision Letter Terms Defined

- Pre-Discount: Total cost of the equipment/services before the E-Rate discount is applied.
- Discount Amount: Pre-discount amount times discount rate.
- Post-Discounts and Invoicing Amounts:
  - Total Eligible Charges times discount rate equals FRN committed amount on the FCDL.
  - The “Commitment Request” in EPC is the amount eligible for funding and payment through the E- Rate program and for payment during the invoicing process.
- Non-Discount Amount: Amount applicant pays for the services/equipment using non-E-Rate funds. The non-discount amount cannot be paid or credited by the service provider.

Relationship Between Unique Numbers



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

Transitioning Services

- Transition of Services is when an applicant changes from one service and/or one service provider to another during a funding year. The actual cutover dates may occur during the middle of the funding year and may change from the original planned transition dates.
- **Notifying USAC and Updating Your FCC Form 471:**
  - FCC Form 471 is in review: Applicant should submit a RAL Request
  - FCC Form 471 has been processed: Applicant should submit a SPIN Change or Service Sub Request
    - Changing Service Providers: Processed through a SPIN Change Form
    - Changing Services: Processed through the submission of a Service Substitution Form

Transitioning Services

- Program rules prohibit the funding of duplicative services (including the same service to the same locations at the same time).
  - The applicant can apply for funding related to services from the incumbent, and the new provider that will be taking over during the applicable funding year will supply planned cutover dates.
  - Ensure that the two FRNs for the transitioning service do not request funding for a time period that exceeds 12 months (e.g., if one FRN requests funding for four months, then the other FRN should only request funding for eight months.) The service period for these two FRNs **cannot** overlap, and the total service period of these two FRNs **cannot exceed 12 months**.

Transitioning Services

- **Scenario:** The cutover date is not at the start of the funding year, the applicant does not know when the new service provider will cut over, or the cutover date changes:
  - Work with the new provider to determine a realistic estimate of the cutover date.
    - The applicant should then request funding for services from the incumbent and the new provider on separate FRNs on the same application (not to exceed 12 months combined).
  - If the cutover date changes, then the applicant can file a post-commit (SPIN and/or Service Sub) request to address this change.
    - If necessary, the original FRN can be split into an additional FRN by USAC during the post-commitment process, but the total funding for the related FRNs is limited to the original commitment amount and cannot exceed 12 months of service.

Transitioning Services: Circuits Example

Cutover on the **Same** Date

- Submit two FRNs on the same FCC Form 471 application for all of the circuits.
  - One FRN for the existing service.
  - One FRN for the new service.
  - The cutover date that the applicant previously established with the service provider(s) will inform the service start and end dates for these FRNs.

Cutover on **Different** Dates

- The applicant should take into account the various transition dates for each circuit when determining how many FRNs they will submit, grouping those with a similar transition date together on the same FRN.
- Submit two FRNs for each circuit.
  - One for the existing service.
  - One for the new service.
  - The cutover date that the applicant previously established with the service provider(s) will inform the service start and end dates for these FRNs.

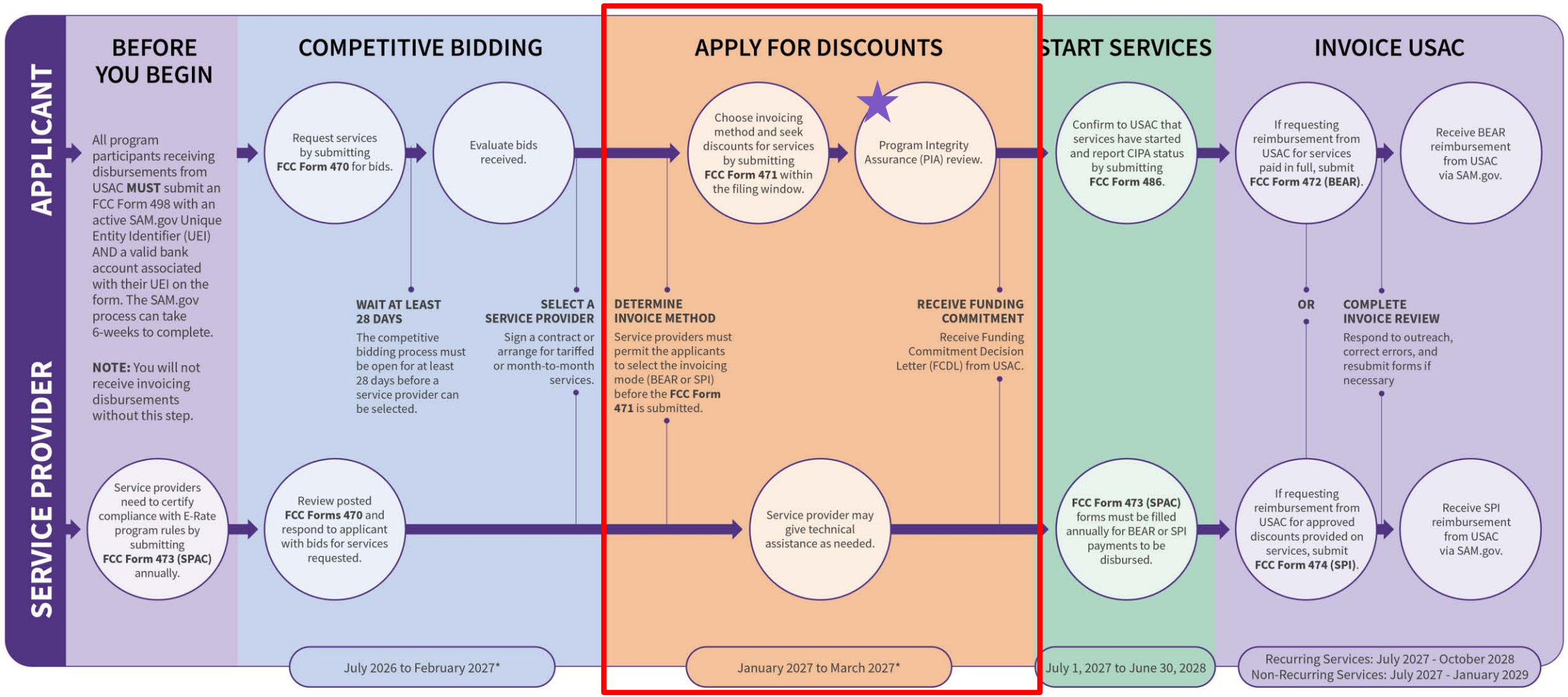
Transitioning Services: Filing SPIN and/or Service Substitution

- **Narrative**: Explain that due to a Transition of Service issue, the applicant seeks to alter the service start and end dates for specific FRNs. The narrative should include the existing service FRN(s), and new service FRN(s), in addition to the specific changes the applicant would like made to the service start and end dates (i.e., cutover dates). An example narratives:
  - Service Provider Name1 (SPIN1) will provide Ethernet at 3G starting on 7/1/2026 and ending on 11/30/2026. Service Provider Name2 (SPIN2) will provide Ethernet at 20G starting on 12/1/2026 to 6/30/2027.
- Submit forms as soon as the cutover date is verified so that USAC can make the necessary adjustments to the affected FRNs.
- SPIN EPC Change User
- EPC User Guide: Service Substitutions

Application Review

Program Integrity Assurance (PIA) Review

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



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

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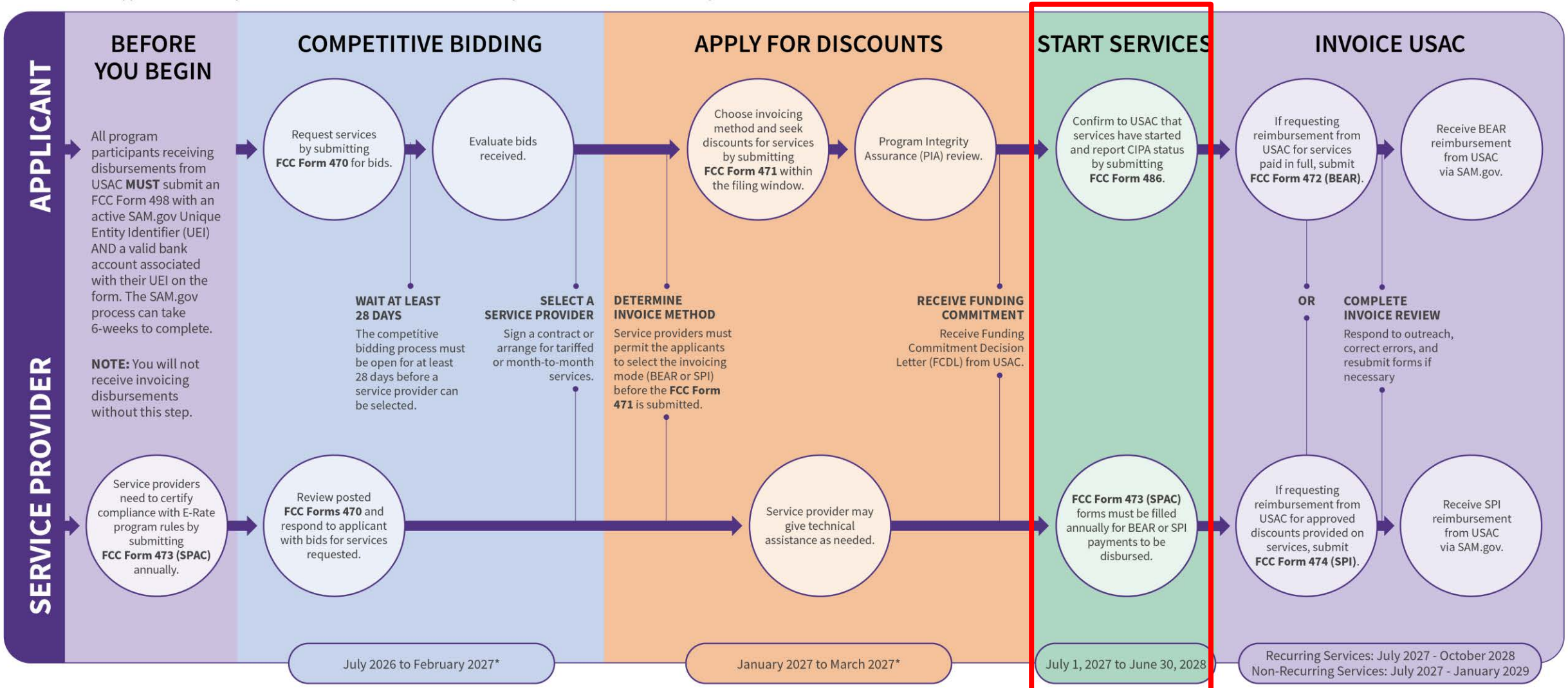
Before Your PIA Review – Review Your FCC Form 471

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

Starting Services

What is the FCC Form 486/473?

To start the E-Rate Application Process, you MUST have access to the E-Rate Productivity Center (EPC) to submit forms. If you need assistance, reach out to the E-Rate Customer Service Center at (888) 203-8100.



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https://www.usac.org/about/sam-gov-uei-requirement/

FCC Form 486: Receipt of Service Confirmation and Children's Internet Protection Act Certification Form

- Submit FCC Form 486 to tell USAC when your services have started.
- Services should start before the deadline noted in your Funding Commitment Decision Letter (FCDL).
- The FCC Form 486 **must be certified** no later than (whichever is later):
  - 120 days after the Service Start Date (SSD) reported on the FCC Form 486, or
  - 120 days after the date of the FCDL.
- Late submission of the FCC Form 486 can impact your commitment.
- Verify your Children's Internet Protection Act (CIPA) compliance.
- The standalone filing requirement for FCC Form 486 will be phased out Funding Year 2028, and the required CIPA compliance certifications will be integrated into the FCC Form 471. Applicants must continue to meet standard Form 486 deadlines until the transition is complete.



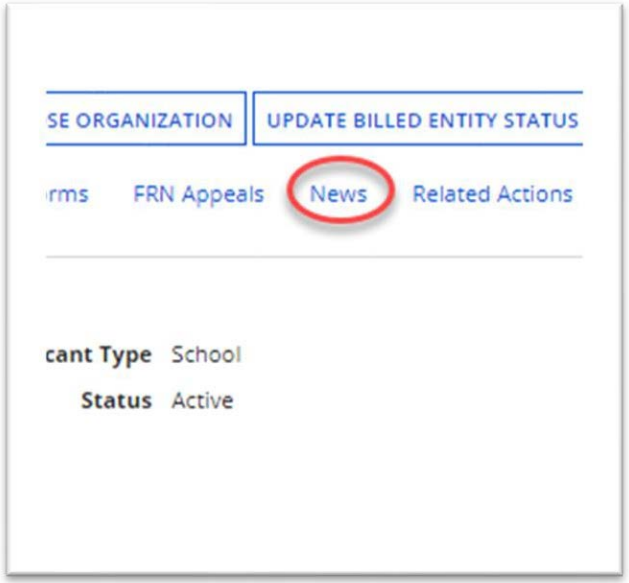
July 1, 2026,
to
June 30, 2027

FCC Form 486 Notifications

- After you submit the FCC Form 486, USAC sends you and your service provider:
  - A confirmation of receipt.
  - A letter informing you of USAC's decision.
- After USAC has approved your FCC Form 486 and services have started, you or your service provider may begin invoicing USAC for the discounted amount of the costs of the approved equipment and services.

Respond to Any "Urgent Reminder" Notification

- If you receive an "urgent reminder" regarding your FCC Form 486, it means you appear to have missed the deadline to certify based on the service start date reported on the FCC Form 471.
- USAC delivers this letter in your **News** Feed within the E-Rate Productivity Center (EPC).
- Applicants have 15 days from the date of the letter to submit and certify the FCC Form 486 without penalty (if the service start date reported on the FCC Form 471 was the actual service start date).



File Service Provider Annual Certification (SPAC)

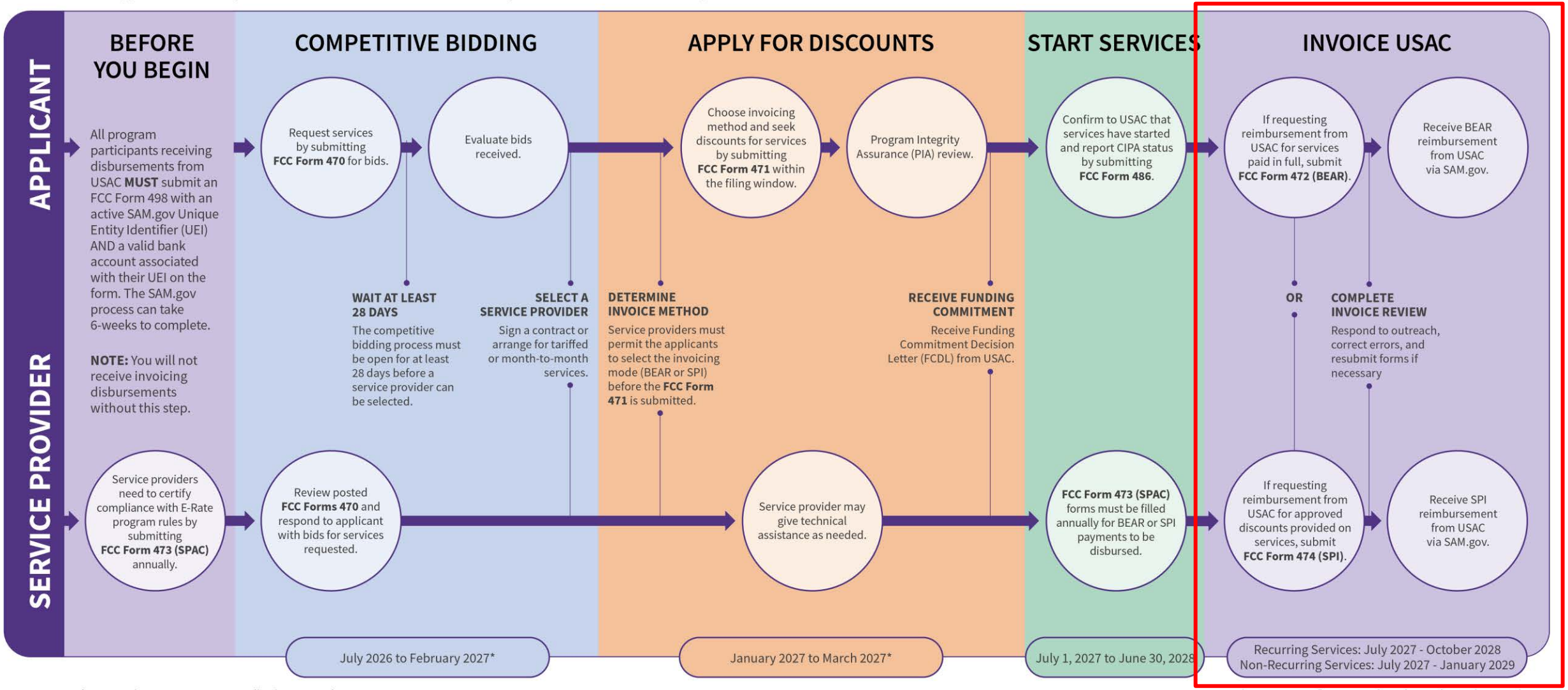
- Service providers must file an FCC Form 473 (Service Provider Annual Certification (SPAC) Form) to certify that they will comply with Schools and Libraries (E-Rate) program rules and guidelines.
- FCC Forms 473 are filed in the E-Rate Productivity Center (EPC). Only full-rights users can certify an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

FCC Form 473

Invoicing Overview

What is the FCC Form 472/474?

To start the E-Rate Application Process, you MUST have access to the E-Rate Productivity Center (EPC) to submit forms. If you need assistance, reach out to the E-Rate Customer Service Center at (888) 203-8100.



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

https://www.usac.org/about/sam-gov-uei-requirement/

Invoicing Methods

- The invoicing method is chosen by the applicant.
  - Must be decided before certification of FCC Form 471 (Description of Services Ordered and Certification Form).
  - Method is specific to the Funding Request Number (FRN).
  - Non-reversible once the method is chosen.
- Two Options:
  - FCC Form 472 (Billed Entity Applicant Reimbursement (BEAR) Form)
  - FCC Form 474 (Service Provider Invoice (SPI) Form)
- Once USAC processes an invoice for an FRN, the method of invoicing is set for that FRN and cannot be changed.
- Billed rates much not exceed contracted rates and USAC will only pay up the committed and contracted rates.

472
(BEAR)

OR

474
(SPI)

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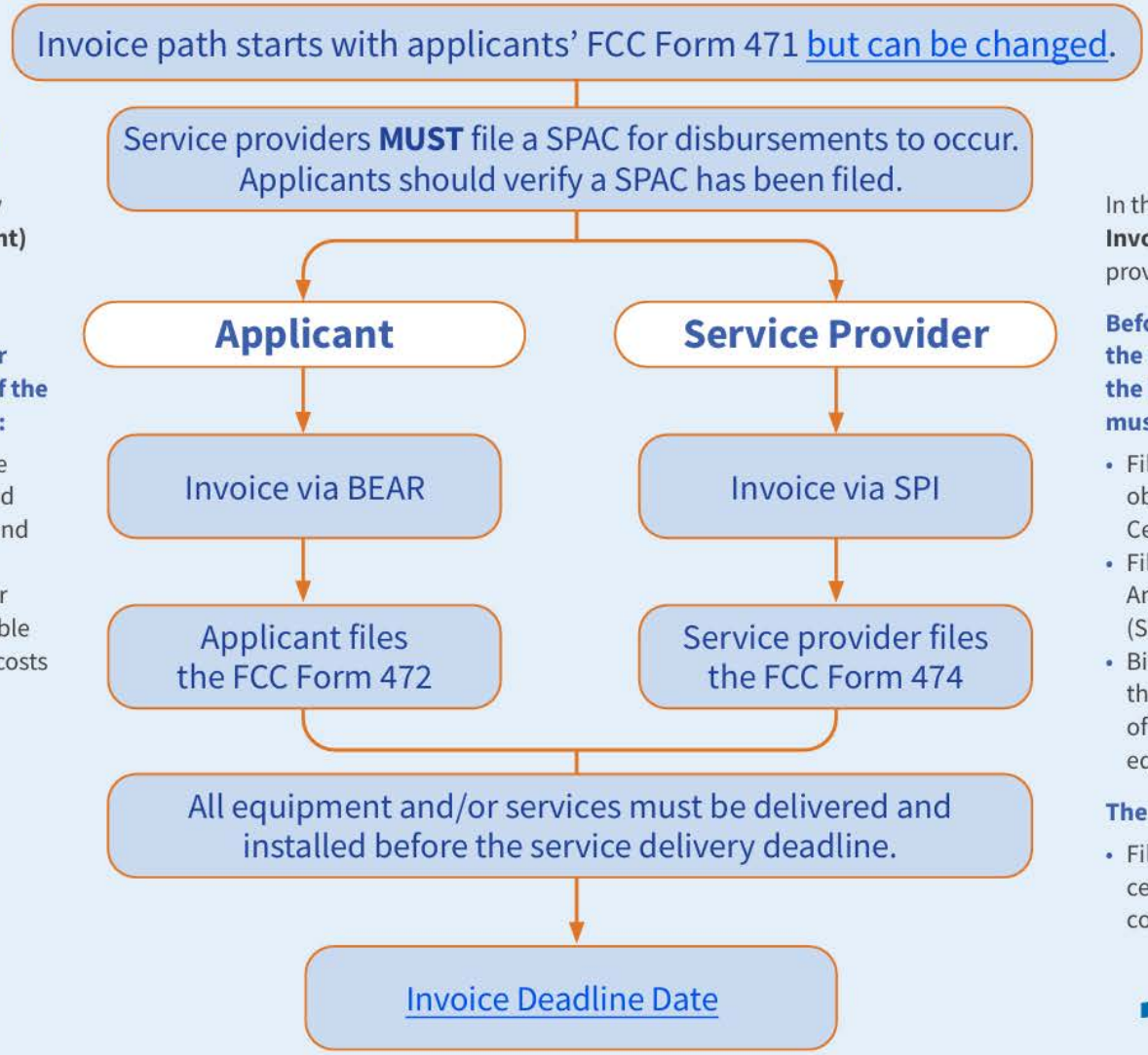
Two Methods of E-Rate Invoicing

Applicants in the E-Rate program can choose how to receive reimbursement from USAC for the discounted portion of the cost of their approved, eligible services and/or equipment.



BEAR Method

In the **BEAR (Billed Entity Applicant Reimbursement)** method, the applicant invoices USAC directly.

Before invoicing USAC for the discounted portion of the bill, applicant must have:

- Ensured that the Service Provider's SPAC was filed
- Filed an FCC Form 498 and obtained a 498 ID/SPIN
- Paid the service provider in full for approved eligible equipment and service costs
- Filed FCC Form 486 to certify service start and CIPA compliance

The service provider must have:

- Filed an FCC Form 473

SPI Method

In the **SPI (Service Provider Invoicing)** method, the service provider invoices USAC.

Before invoicing USAC for the discounted portion of the bill, the service provider must have:

- Filed an FCC Form 498 and obtained a 498 ID/SPIN Certified an FCC Form 473
- Filed a Service Provider Annual Certification Form (SPAC)/FCC Form 473
- Billed the applicant for thenon-discounted portion of approved eligible equipmentand service costs

The applicant must have:

- Filed an FCC Form 486 to certify service start and CIPA compliance

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When To File an invoice

- File after equipment and/or services are delivered and paid.
- Reminder, indicate your method on FCC Form 471:
  - For the BEAR Method, applicants pay service provider in full.
  - For the SPI Method, service providers bill applicant for their non- discount share first.
- You can request an invoice deadline extension before or up to 15 days after the original invoice filing deadline
- File invoices **on or before** the invoice filing deadline:
  - Generally, October 28 for recurring services.
  - Generally, January 28 for non-recurring services.
  - If the deadline falls on a weekend or federal holiday, the deadline is extended to 11:59 p.m. ET on the following business day.
  - Filers are entitled to one, 120-day Invoicing Deadline Extension per FRN.
  - You must file your invoice or deadline extension request **before** the invoice deadline.
  - Extensions are filed by the applicant and service providers within EPC.

472
(BEAR)

OR

474
(SPI)

Invoice Deadline Extension

- Filers are entitled to one, 120-day invoice deadline extension per FRN.
- You can file an invoice deadline extension request even if you do not use or need it.
- Because of changes made in FCC 26-30, invoice filers have a one-time, 60-day grace period to resubmit corrected versions of invoices that were timely filed before the invoice filing deadline but rejected by USAC after the invoicing deadline..
- Extension requests are filed by the applicant and service providers within EPC.
- If you miss the deadline to file an invoice or request an extension, you must request and be granted a waiver of the invoice filing deadline from the FCC.

Invoicing Reminders

- Contract Expiration date (CED) versus Invoice Deadline Date (IDD)
  - CED – USAC will not pay for services delivered outside of the contract expiration end date. For example, if the CED is 3/1/2025 and the funding year spans from 7/1/2024 - 6/30/2025, we can only pay until the contract expiration date of 3/1.
  - Incorrect CED can be fixed via an FCC Form 500.
  - IDD is the last day to submit an invoice to USAC for an approved FRN.

Invoicing Appeals

- If your timely-filed invoice is rejected or modified, you have two options:
  - If it is before the IDD, resubmit a corrected invoice.
  - If it is after the IDD, you have the right to appeal the decision.
    - Note: Once the changes in FCC 26-30 are made effective, a timely-filed invoice that is rejected near the IDD will also extend the IDD by 60 days and permit refiling, if appropriate.
    - If it is rejected a second time, you have the right to appeal the decision.
- Appeals must be filed **first** with USAC.
- You have **60 days** to appeal to USAC.
- Appeals filed more than 60 days after the decision date are automatically dismissed, and a waiver must be filed with the FCC.
- If USAC denies the appeal, you have **60 days** to appeal that denial to the FCC.
- Waivers of the Commission's rules, such as the invoice deadline rule, can only be sought from the FCC. An appeal of a timely-filed invoice that is rejected or modified does **not** require a waiver of the invoice deadline rule.
- Additional information on the appeals and waivers is available on USAC's website.

E-Rate Program Compliance

Document Retention

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

Document Retention (cont.)

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

Protecting the USF and E-Rate Program

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

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

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

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

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

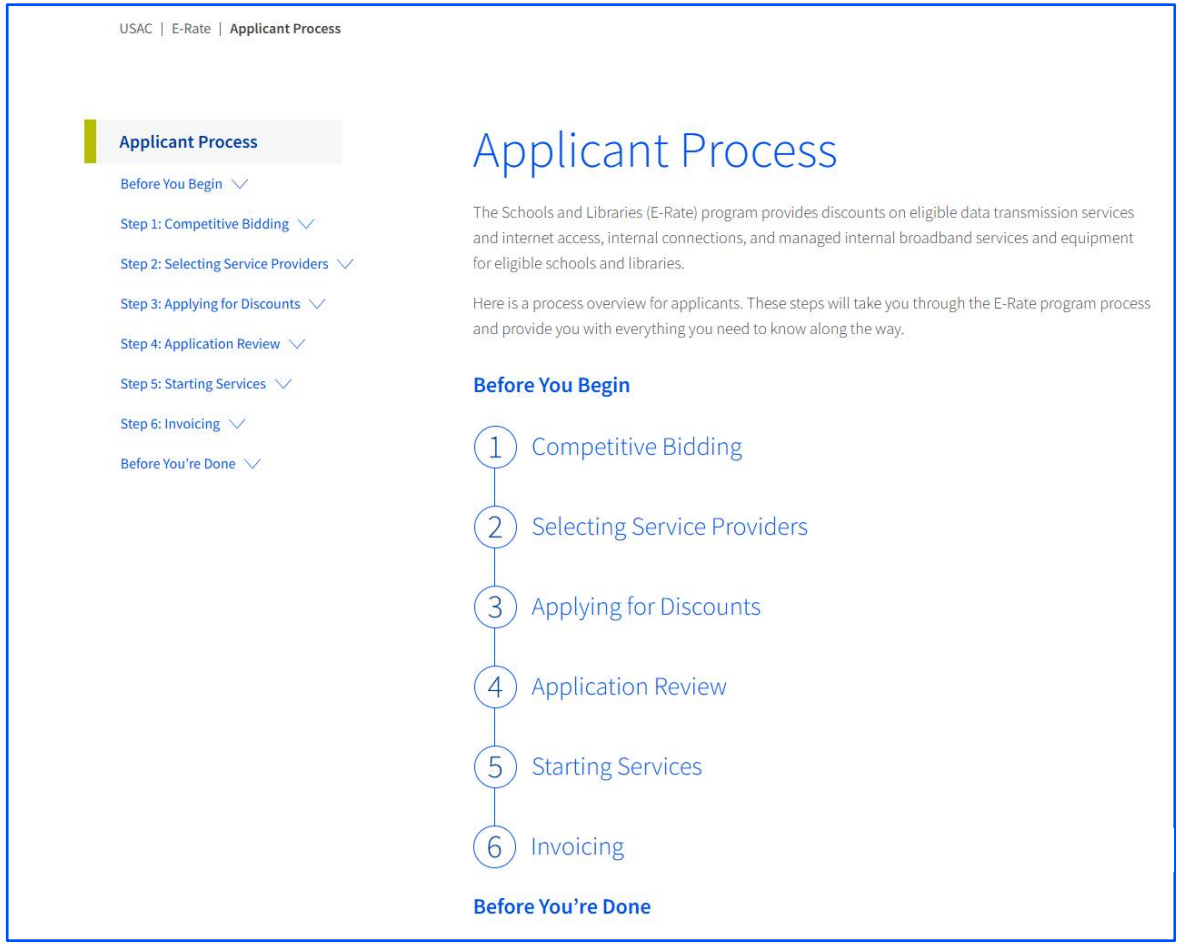
E-Rate Tools and Resources

E-Rate Tools and Resources: Interactive User Guides/eLMs

- Interactive User Guide/eLearning Module (eLM) Features
  - Interactive modules incorporating multiple learning styles.
  - Self-paced EPC walk throughs.
  - Review of E-Rate program rules and processes.
  - Links to resources on the E-Rate website.
- Program Training and Overview Material
- **Interactive User Guides and eLMs for Form Filings and Commitments**
  - Pre- and Post-Commitment Processes: Admin Window, FCC Forms 470, 471, 472, and 473/474, FCC Form 498, FCC Form 486 and CIPA Video.
- EPC Invoicing for Service Providers Videos & eLMs
- Open Data Platform Videos
- Accessible on the USAC E-Rate Videos webpage and each respective form's webpage.

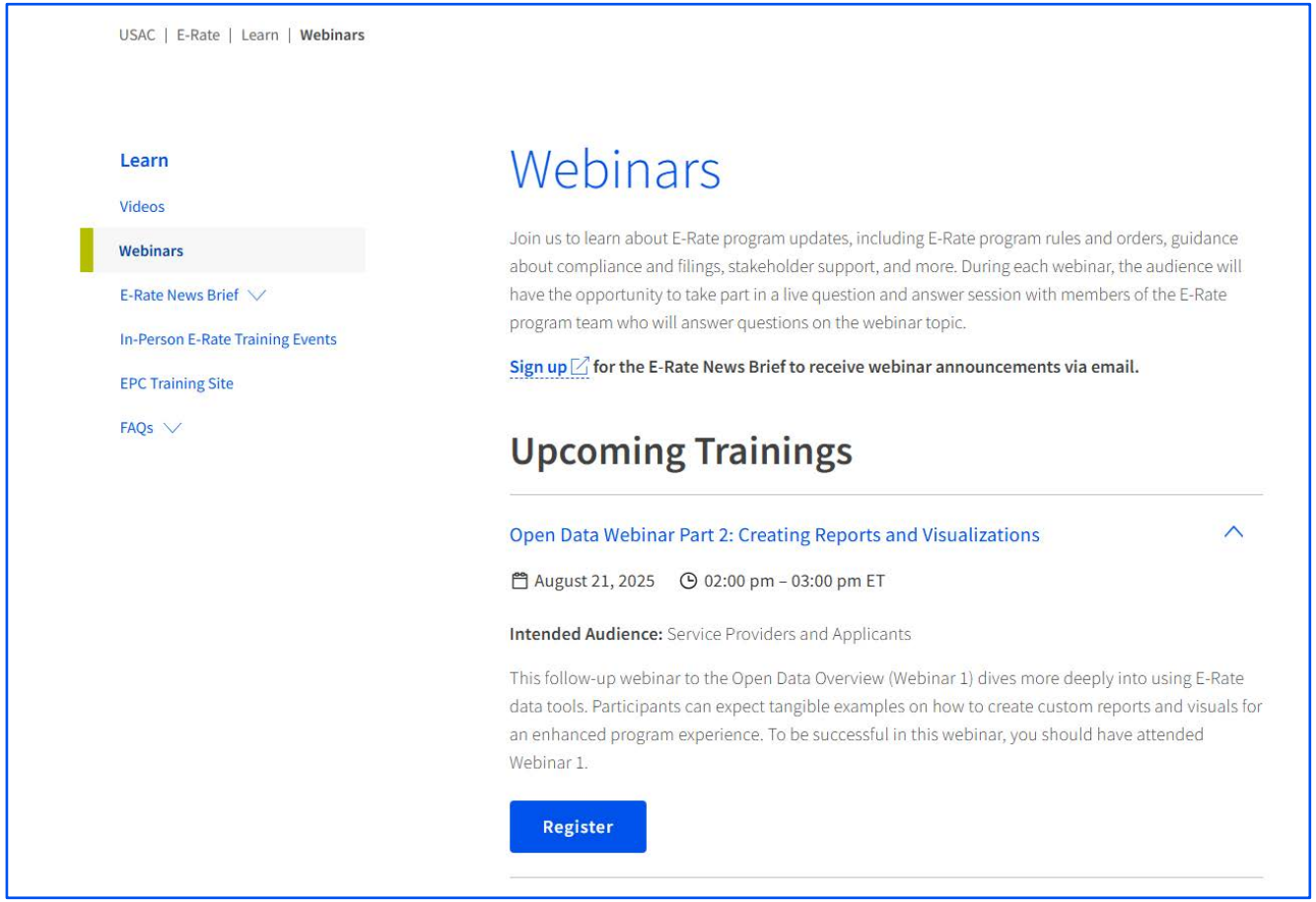
E-Rate Tools and Resources: Website

- Step-by-step articles covering the entire application process for applicants and service providers
- Announcements
- FAQs
- Interactive User Guides
- Videos
- Webinars
- Infographics
  - FCC Form 470, Invoicing, etc.
- The E-Rate website is accessible here.



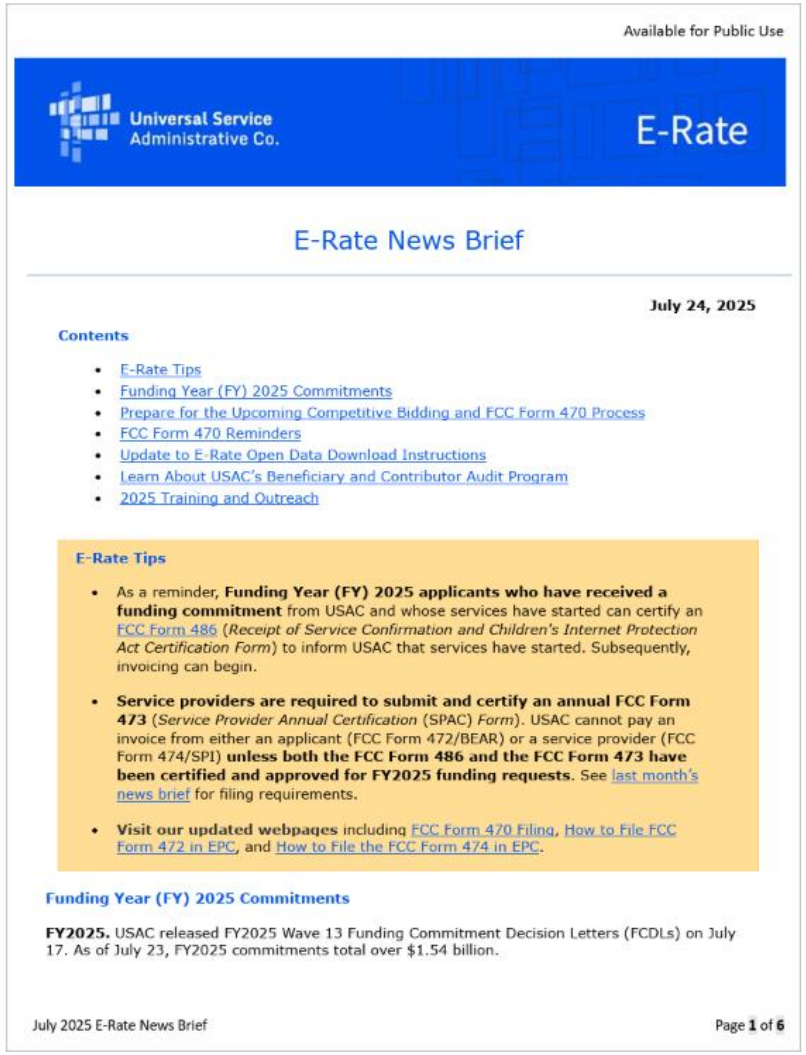
E-Rate Tools and Resources: Webinars

- Online training
- Opportunities for Q&A
- Recordings available on the Webinar page of E-Rate's website.
- Hosted throughout the year.
- The Webinars page is accessible here.



E-Rate Tools and Resources: News Brief

- Provides reminders, updates, tips and tricks.
- Sent monthly via email.
- Subscribe here.



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Universal Service Administrative Co. E-Rate

E-Rate News Brief

July 24, 2025

Contents

- E-Rate Tips
- Funding Year (FY) 2025 Commitments
- Prepare for the Upcoming Competitive Bidding and FCC Form 470 Process
- FCC Form 470 Reminders
- Update to E-Rate Open Data Download Instructions
- Learn About USAC's Beneficiary and Contributor Audit Program
- 2025 Training and Outreach

E-Rate Tips

- As a reminder, **Funding Year (FY) 2025 applicants who have received a funding commitment** from USAC and whose services have started can certify an FCC Form 486 (*Receipt of Service Confirmation and Children's Internet Protection Act Certification Form*) to inform USAC that services have started. Subsequently, invoicing can begin.
- **Service providers are required to submit and certify an annual FCC Form 473** (*Service Provider Annual Certification* (SPAC) *Form*). USAC cannot pay an invoice from either an applicant (FCC Form 472/BEAR) or a service provider (FCC Form 474/SPI) **unless both the FCC Form 486 and the FCC Form 473 have been certified and approved for FY2025 funding requests**. See last month's news brief for filing requirements.
- **Visit our updated webpages** including FCC Form 470 Filing, How to File FCC Form 472 in EPC, and How to File the FCC Form 474 in EPC.

Funding Year (FY) 2025 Commitments

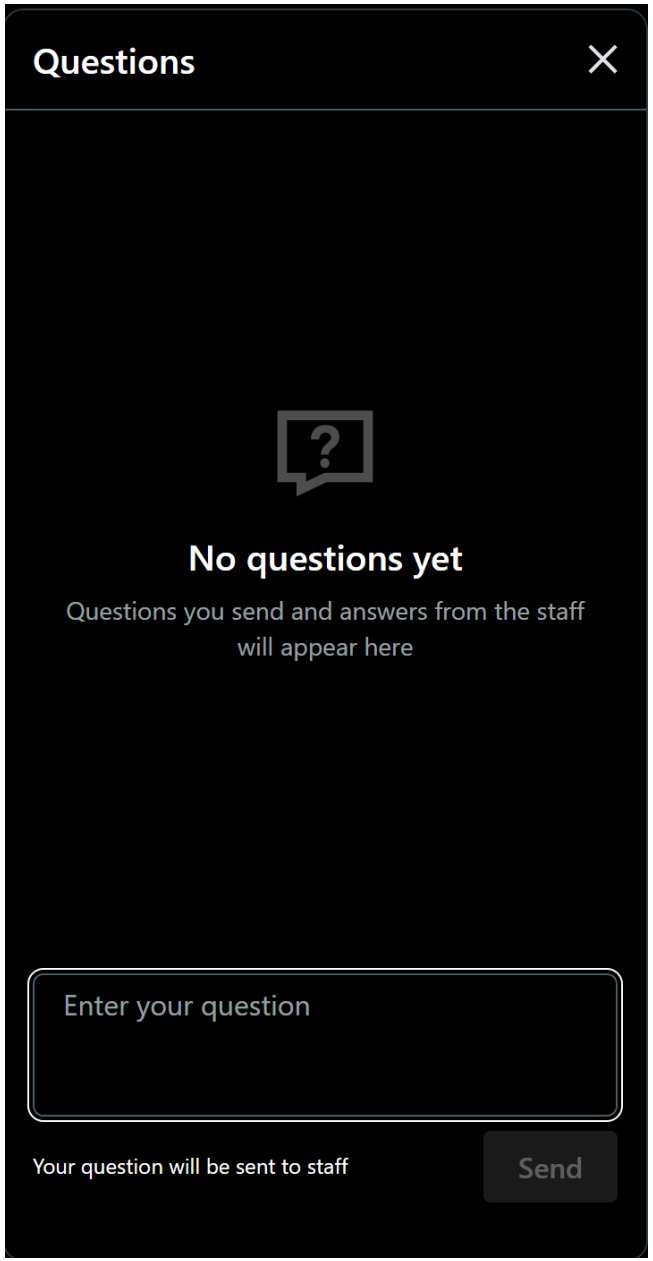
FY2025. USAC released FY2025 Wave 13 Funding Commitment Decision Letters (FCDLs) on July 17. As of July 23, FY2025 commitments total over $1.54 billion.

July 2025 E-Rate News Brief Page 1 of 6

Live Q&A

Submit your questions **about today's topics**:

- FCC Form 470
- Competitive Bidding
- Selecting Service Provider
- FCC Form 471
- Applying for Discounts
- SPAC
- Invoicing



Q&A Tips

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

Questions?

E-Rate Customer Service Center (CSC)



Call us at (888) 203-8100

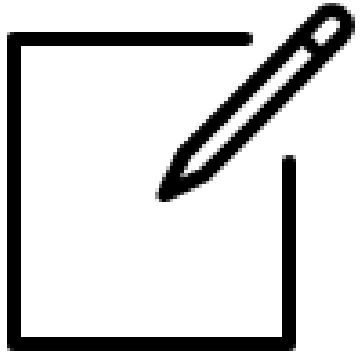
Monday – Friday 8 a.m. to 8 p.m. ET



Create a customer service case

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

Share Your Thoughts



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

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Thank You!

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