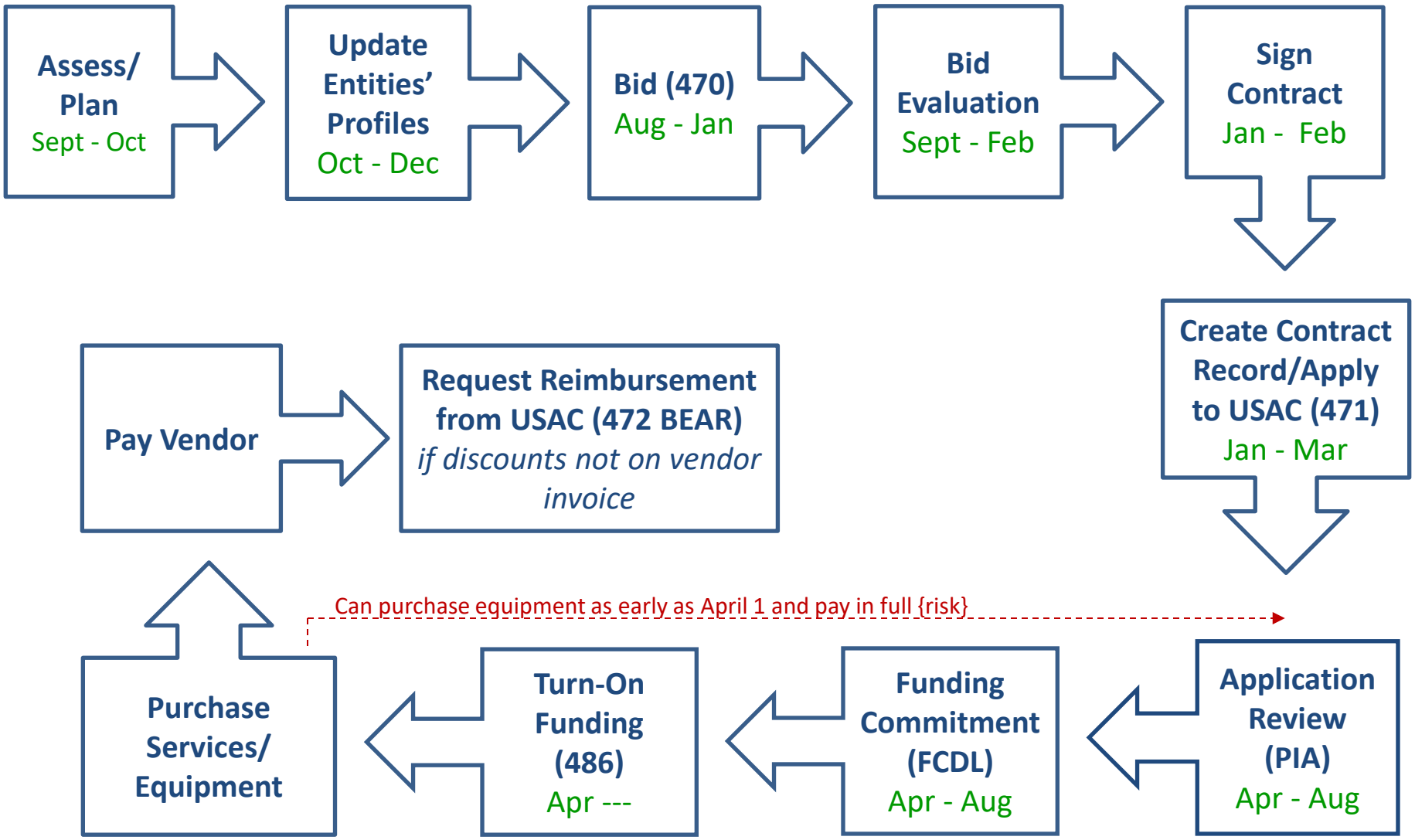
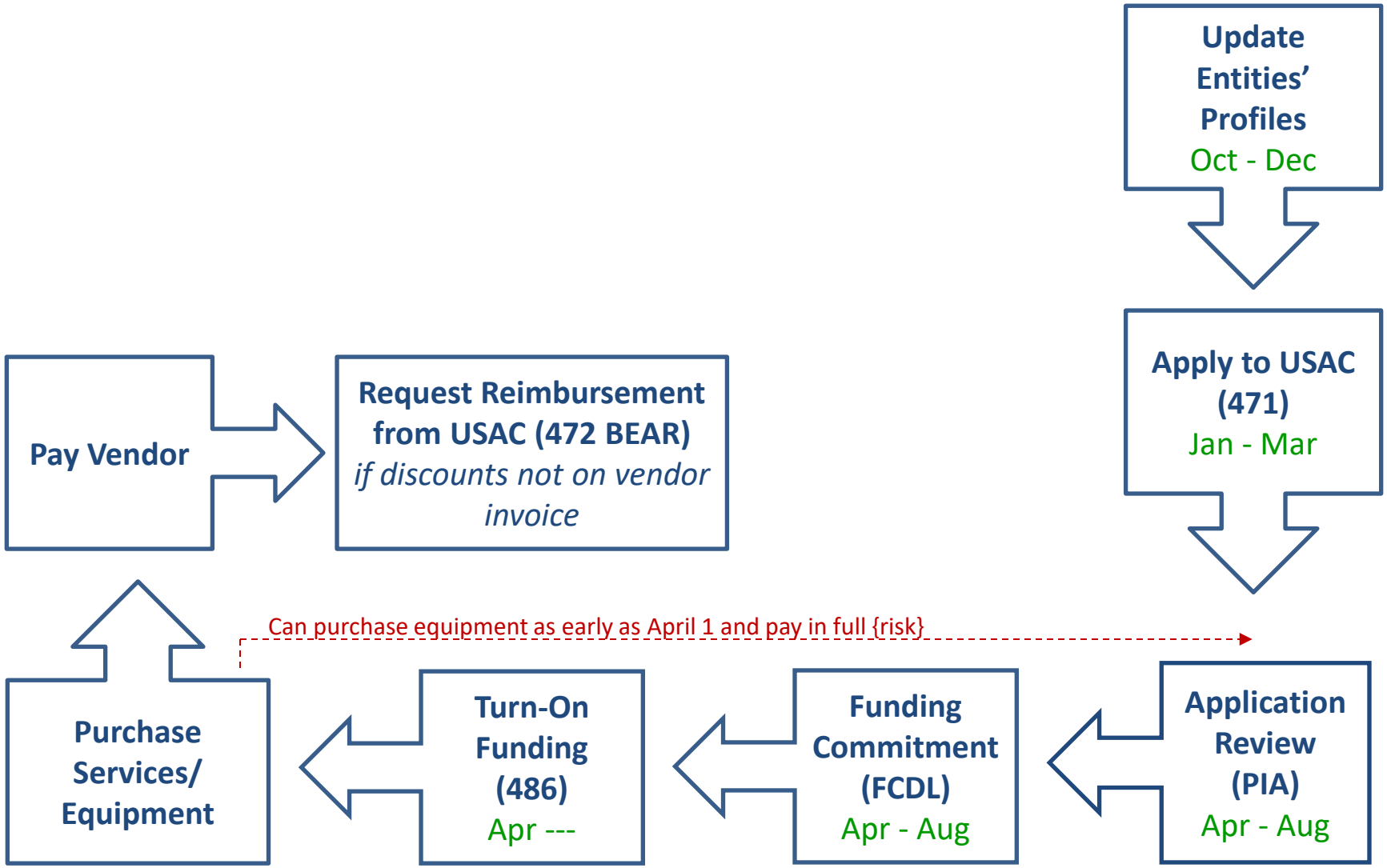
The E-Rate Process: New Contract



The E-Rate Process: Existing Contract



FUNDING YEAR 2027 APPLICATION CYCLE

Form	Description	Sept 2026	Oct 2026	Nov 2026	Dec 2026	Jan 2027	Feb 2027	Mar 2027	Apr 2027	May 2027	June 2027	July 2027	Aug 2027	Sept 2027	Oct 2027	Nov 2027	Dec 2027	Jan 2028	Feb 2028	Mar 2028	Apr 2028	May 2028	June 2028	July 2028	Aug 2028	Sept 2028	Oct 2028	Nov 2028	Dec 2028	Jan 2029
									FY 2026 - Non-Recurring Services/Equipment Purchases - April 1, 2027 - Sept 30, 2028																					
												FY 2027 - Recurring Services - July 1, 2027 - June 30, 2028																		
470	Competitive Bidding Window (min. 29 days)	July 1, 2026- February 25, 2027 *(estimated)* estimated																											
AW	Administrative Window (EPC Profile Updates)		Oct. 21, 2026 - Jan. 8, 2027 *estimated*																										
	Newly Signed Vendor Contracts Uploaded to EPC																												
471	Funding Request Application Window					Jan. 14, 2027 - Mar. 25, 2027 *estimated*																								
PIA/FCDL	PIA Review/Funding Decision Letters (FCDL) Issued								April 2027 - Sept 1, 2027																				
486	CIPA Certification/Turn on Funding																												
472	BEAR Deadline - Recurring Services																									Oct 28			
	BEAR Deadline - Non-Recurring Services																												Jan 28

REMINDERS:

* Form 470's should be filed before a new contract is signed.
* Form 470's must be posted for at least 29 days before bid evaluations are performed and the Form 471 is filed.
* Most public schools require board approval before contracts are signed.
* Contracts must be signed and uploaded into EPC prior to filing the Form 471.
* A Form 471 must be filed EVERY year to receive E-Rate funding.
* A 1-time, 120-day BEAR extension must be requested by the original BEAR deadline.
* Recurring Services = broadband, internet, maintenance services. 12 month funding year.
* Non-Recurring Services = 1-time equipment purchases/C1 installation charges. 18 month funding year.

E-Rate Funding Year Activities

E-Rate is a year-long process, and it is important to meet each deadline. Use this timeline to help stay on track.
Please note that these activities are for the Funding Year, which starts in July and ends in June.



usac.org/e-rate/get-started

Universal Service Administrative Co.

Universal Service Administrative Co.

E-Rate Glossary of Terms

Use this E-Rate Glossary to find commonly-used terms and definitions.

Terms	Programs	Definitions
1ST DEMAND PAYMENT LETTER	E-Rate	The initial letter sent by USAC to recover funds from applicants or service providers that have been disbursed funds in violation of program rules or requirements. This letter comes after a COMAD or RIDF letter has been sent describing the reason for the recovery.
28-DAY WAITING PERIOD	E-Rate	The minimum time period an applicant is required to wait after posting the FCC Form 470 before entering into any contract with a service provider and submitting the FCC Form 471.
2ND DEMAND PAYMENT LETTER	E-Rate	A follow-up request for payment issued 31 days after the 1st Demand Payment Letter to the impacted party or parties who failed to take action to return funds disbursed in violation of program rules or requirements. As of the date of the second letter, recipients are placed on Red Light status. See also Red Light Rule and Red Light status.
498 COMPANY OFFICER	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	The officer of a service provider company who is authorized to certify that data set forth in the FCC Form 498 is true, accurate, and complete. The 498 Company Officer has access to certify forms through USAC's E-File system and occupies a position specified in the company's corporate by-laws (or partnership agreement): typically, president, vice president of operations, vice president of finance, CFO, comptroller, treasurer, or a comparable position. If the reporting entity is a sole proprietorship, the owner must serve as the certifier.

Terms	Programs	Definitions
498 ID/SERVICE PROVIDER IDENTIFICATION NUMBER (SPIN)	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	A unique nine-digit number that USAC assigns to a service provider once that service provider has submitted the FCC Form 498 to USAC. Every service provider is required to have a 498 ID/SPIN to participate in any of the four universal service programs and receive payments from USAC. E-Rate program applicants who select the Billed Entity Applicant Reimbursement (BEAR) invoicing process also need to complete an FCC Form 498 and will receive an applicant 498 ID.
499 COMPANY OFFICER	E-Rate, High Cost, Service Providers	The officer of a service provider company who is authorized to certify that data set forth in the FCC Forms 499-A/Q is true, accurate, and complete. The 499 Company Officer has access to certify forms through USAC's E-File system and occupies a position specified in the company's corporate by-laws (or partnership agreement): typically, president, vice president of operations, vice president of finance, CFO, comptroller, treasurer, or a comparable position. If the reporting entity is a sole proprietorship, the owner must serve as the certifier.
ACCOUNT ADMINISTRATOR	E-Rate	An EPC user who can manage users, permissions, and related entities for an organization such as a school, library, service provider, or consulting firm.
ADMINISTRATIVE AUTHORITY	E-Rate	The relevant authority with responsibility for administration of the eligible school or library who must certify the status of the entity's compliance with the Children's Internet Protection Act (CIPA) in order to receive universal service support.
ALLOWABLE CONTRACT DATE (ACD)	E-Rate	The earliest date on which an E-Rate applicant can sign a contract for contracted services or enter into an arrangement for tariffed or month-to-month services with a service provider. It is calculated as at least 28 days or four weeks after the FCC Form 470 is certified.

Terms	Programs	Definitions
ALTERNATIVE DISCOUNT MECHANISMS	E-Rate	An alternative method for schools that choose not to use NSLP participation numbers to calculate their E-Rate program discounts. Federally approved alternative discount mechanisms cannot be less stringent than the same measure of poverty established for the NSLP. See also National School Lunch Program.
APPEAL	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	A request to reconsider a USAC decision. Any party that wishes to appeal must first do so with USAC before filing an appeal with the FCC. Once USAC has made a decision on an appeal, the party may appeal USAC's decision to the FCC. Parties seeking a waiver of FCC rules should file an appeal directly with the FCC because USAC cannot waive FCC rules. For more information, visit USAC's Appeals page.
APPLICANT	E-Rate, Rural Health Care	The entity applying for universal service support. In the RHC and E-Rate programs, an applicant may be an individual organization or a consortium composed of multiple organizations.
AUDIT	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	An examination of documentation and resources that verify the state of compliance with program rules. USAC conducts audits through the Beneficiary and Contributor Audit (BCAP) and Supply Chain Audit Program (SCAP) programs in accordance with the Generally Accepted Government Auditing Standards.
AUTHORIZED USERS	E-Rate, Rural Health Care, High Cost, Service Providers	The employee(s) of a service provider company, established by the Company Officer or General Contact, authorized to enter and modify company information on FCC Forms 498 and 499 through the E-File application. For more information, visit USAC's Entitlements Guide.
BASIC MAINTENANCE OF INTERNAL CONNECTIONS (BMIC)	E-Rate	Services covering the repair and upkeep of eligible equipment inside a school of library (i.e., within the facility demarcation point). BMIC is a Category Two service type on the E-Rate program's Eligible Services List. See also Category Two Services.

Terms	Programs	Definitions
BEAR NOTIFICATION LETTER	E-Rate	A letter USAC sends to an E-Rate applicant and their service provider after a Billed Entity Applicant Reimbursement form (FCC Form 472) has been processed by USAC. The letter can be accessed from the EPC Newsfeed.
BENEFICIARY AND CONTRIBUTOR AUDIT PROGRAM (BCAP)	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	An audit program through which USAC confirms program compliance and the amounts of recoverable funds among universal service beneficiaries and contributors. BCAP audits may be performed by USAC's internal audit staff or a firm under contract to USAC. For more details, visit USAC's BCAP webpage.
BID	E-Rate, Rural Health Care	A response from a service provider (bidder) to a request for services. RHC and E-Rate program applicants request bids from service providers by posting their service needs to USAC's website for a minimum of 28 days.
BILLED ENTITY	E-Rate	The entity that receives the bill and pays for the supported service. A Billed Entity may be separate from the physical location receiving services.
BILLED ENTITY NUMBER (BEN)	E-Rate	A unique number assigned in EPC to each entity (school, library, school district, library system, or consortium) related to an application or associated funding requests. Whether the entity is a parent entity or a child entity associated to a parent BEN, each receives a distinctive billed entity number in EPC. For more information on creating, modifying, or cancelling a BEN, visit the E-Rate program's Entity Numbers page.
BUNDLED SERVICES COST ALLOCATION	E-Rate	The requirement that E-Rate program recipients cost-allocate non-ancillary ineligible components bundled with equipment or services eligible for E-Rate support (e.g., virtual private networks (VPNs) bundled with internet access.) See also Eligible Services List.

Terms	Programs	Definitions
CATEGORY ONE SERVICES	E-Rate	Services used to connect broadband or internet to eligible locations, or services that provide basic conduit access to the internet. Data transmission services and internet access are Category One services. See also Eligible Services List.
CATEGORY TWO BUDGET	E-Rate	The five-year maximum budget of E-Rate pre-discount funds that an applicant may receive for Category Two (C2) equipment and services within a school district, independent school, library system, or independent library. The C2 budget covers a 5-year budget cycle, with the current cycle running from FY2021-FY2025. The subsequent cycle will run from FY2026-FY2030. For additional details on C2 rules, visit the E-Rate program's Category Two Budgets page.
CATEGORY TWO SERVICES	E-Rate	Internal connections services needed to enable high-speed broadband connectivity and broadband internal connections components. Category Two includes local area networks/ wireless local area networks (LAN/ wireless LAN), internal connections components, basic maintenance of internal connections services, and managed internal broadband services. See also Basic Maintenance of Internal Connections, Managed Internal Broadband Services, and Eligible Services List.
CHILDREN'S INTERNET PROTECTION ACT (CIPA)	E-Rate	A law that mandates certain internet safety and filtering requirements for recipients of E-Rate program discounts for services other than telecommunications services.
CODE OF FEDERAL REGULATIONS (CFR)	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	The general and permanent rules published in the Federal Register by federal government agencies and executive branch departments. Telecommunications rules are located in Title 47 of the CFR. For specific language, see a digital version of the CFR.
COMMISSION	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	A common abbreviation for the Federal Communications Commission (FCC). See also FCC.

Terms	Programs	Definitions
COMMITMENT ADJUSTMENT	E-Rate, Rural Health Care	The process by which a universal service funding commitment is reduced by USAC. See also COMAD Letter.
COMMITMENT ADJUSTMENT (COMAD) LETTER	E-Rate, Rural Health Care	Letter that USAC sends to a USF applicant whose funding commitment needs to be fully or partially adjusted (de-committed), including recovery of funds, if necessary. The letter explains the adjustment reason and amount and details whether universal service funds must be returned as a result of the adjustment. The letter also provides information on how to appeal the adjustment decision. Appeals must be received within 60 days of the date on the COMAD letter.
COMMON CARRIER	E-Rate, High Cost, Service Providers	An organization recognized by a regulatory authority (such as a state public utility commission) as providing telecommunications services to all requesting parties, or an organization that offers such services generally to the public for a fee.
COMMUNITY ELIGIBILITY PROVISION (CEP)	E-Rate	A mechanism for calculating schools' levels of need that E-Rate applicants may use as an alternative to annual determinations of eligibility for free and reduced-cost meals under the NSLP. Schools must have at least 25 percent of their students directly certified to qualify for the CEP. For more information on discount calculations in E-Rate, visit the program's Alternative Discount Mechanisms page. See also National School Lunch Program.
COMPETITIVE BIDDING PROCESS	E-Rate, Rural Health Care	The process through which E-Rate and RHC applicants request bids for telecommunications and broadband services and equipment from service provider companies. USAC program rules stipulate that applicants to either program conduct a "fair and open" competitive procurement by posting bid requests to USAC's online portals for a minimum of 28 days.

Terms	Programs	Definitions
CONSORTIUM	E-Rate, Rural Health Care	A group of entities that apply together for universal service funding. In the E-Rate program, consortia can run competitive bid processes and/or apply for discounts on behalf of their members. In the RHC program, non-rural eligible HCPs may join consortia that are majority (50%+) rural but may not receive universal service support against their costs and expenses.
CONSULTANT	E-Rate, Rural Health Care	A company or individual (non-employee of the entity) selected to perform certain activities related to the application process on behalf of the applicant or service provider for a fee. A Letter of Agency (LOA) or consultant agreement must be in place before the consultant undertakes these activities.
CONSULTANT REGISTRATION NUMBER (CRN)	E-Rate, Rural Health Care	A unique eight-digit identification number assigned by USAC to a consulting firm or individual consultant.
CONTRACT AWARD DATE (CAD)	E-Rate	The date a contract is awarded to a service provider. The CAD, which must be a minimum of 28 days after the day the applicant certifies their FCC Form 470, is needed to certify an FCC Form 471.
CONTRACT EXPIRATION DATE (CED)	E-Rate	The date a contract ends between an applicant and service provider.
CORRECTIVE SPIN CHANGE	E-Rate, Rural Health Care	A change to the SPIN featured on one or more FRNs that corrects a data entry error, reflects a merger or acquisition, or fixes some other type of error. It is not the result of a change to the actual service provider by the applicant.
DATA TRANSMISSION SERVICES AND/OR INTERNET ACCESS	E-Rate	A Category One service type on the Eligible Services List that includes broadband connectivity and basic conduit access to the internet but does not include charges for content, equipment purchases, or other services beyond basic conduit access to the internet. This service type also covers lit or dark fiber and self-provisioned broadband networks. See also Category One Services.

Terms	Programs	Definitions
DEMARCATION POINT OR DEMARC	E-Rate, Rural Health Care	The point at which a service provider's network ends and a customer's local area network (LAN) begins.
DETAILED AUDIT FINDING (FINDING OR DAF)	E-Rate, High Cost	A condition that shows evidence of non-compliance with the FCC rules that were in effect during the audit period. A finding or DAF provides background information and exception details following a USAC audit.
DISCOUNT CALCULATIONS	E-Rate	The method the E-Rate program uses to determine discounts for schools, school districts, libraries, and library systems. E-Rate discounts are calculated using the percentage of students eligible for the NSLP (or an equivalent measure of poverty), the rural or urban status of the school district or library system, and the E-Rate discount matrix. See also National School Lunch Program and Urban/Rural Status.
DISTRICT WIDE DISCOUNT RATES	E-Rate	The policy that all USF funding requests for any school—or combination of schools within a school district—qualify for a single school-district-wide discount rate.
DOCUMENT RETENTION	E-Rate	The policy that E-Rate applicants and service providers must retain documentation related to the application for, receipt, and delivery of discounted services for at least 10 years from the last date of service delivery.
E-CERTIFICATION (E-CERT)	E-Rate, Rural Health Care, High Cost, Service Providers	A process that allows universal service support applicants to certify and submit forms online, eliminating the need for paper copies of forms (and original signatures) and facilitating simpler record-keeping.
E-FILE	E-Rate, Rural Health Care, High Cost, Service Providers	USAC's online forms submission tool. Allows universal service support applicants, contributors, and service providers to register with USAC, submit forms, view invoices, add or remove authorized users, update account information, and more. Accessible at https://forms.universalservice.org/.

Terms	Programs	Definitions
E-RATE PRODUCTIVITY CENTER (EPC)	E-Rate	The account and application management portal for the E-Rate program. E-Rate program participants use this tool to manage program processes, receive notifications, create and submit invoices, and contact customer service.
E-RATE PROGRAM	E-Rate	One of the four universal service programs administered by USAC. Formally known as the Schools and Libraries Program, the program provides discounts to schools and libraries for eligible equipment and services.
EDUCATIONAL SERVICE AGENCY (ESA)	E-Rate	A regional public multiservice agency authorized by state statute to develop, manage, and provide services or programs to local educational agencies.
ELIGIBLE ENTITY	E-Rate	An entity that meets the requirements for eligibility to participate in the E-Rate program.
ELIGIBLE SERVICES	E-Rate, Rural Health Care, High Cost, Service Providers	Equipment and services that are eligible for universal service support. In the E-Rate program, eligible services include data transmission services and/or internet access, internal connections, the maintenance of internal connections, and managed internal broadband services. In the High Cost program, eligible services include the costs of deploying rural voice service (legacy funds) or rural broadband service (modernized funds). In the RHC program, eligible services include broadband connectivity and telecommunications services.
ELIGIBLE SERVICES LIST (ESL)	E-Rate	An FCC-released annual list of the equipment and services eligible for reimbursement through E-Rate. Visit the program's Eligible Services List page to see current- and past-year ESLs.
ELIGIBLE TELECOMMUNICATIONS CARRIER (ETC)	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	A designation given to telecommunications service providers by their state public utility commissions or the FCC, enabling them to participate in universal service programs.

Terms	Programs	Definitions
EMERGENCY CONNECTIVITY FUND (ECF) PROGRAM	USAC General, E-Rate	An FCC initiative that helped eligible schools and libraries cover the costs of internet equipment and services during the COVID-19 pandemic. Introduced in 2021, the $7.171 billion program offered financial support for the purchase of laptops and tablets, Wi-Fi hotspots, modems, routers, and broadband connections to serve unmet needs for off-campus use by students, school staff, and library patrons. The ECF's sunset date was June 30, 2024.
EVALUATION	E-Rate	A mechanism for assessing and choosing a service provider from incoming bids. Note that the price of the eligible products and services must be included as a factor in the evaluation and that factor must be weighted more heavily than any other single factor.
EVERY STUDENT SUCCEEDS ACT	E-Rate	The 2015 law, 20 U.S.C. Section §7801, that provides the statutory definitions of elementary and secondary schools.
FCC FORM 470	E-Rate	An FCC form that schools and libraries complete to establish their eligibility for E-Rate support and formally request bids for E-Rate equipment and services from service providers. The certification of FCC Form 470 in EPC initiates the competitive bidding process. The form must then be posted to USAC's website for a minimum of 28 days before the applicant can select a service provider.
FCC FORM 471	E-Rate	An FCC form that schools and libraries use annually to report services ordered and request discounts for those services. Visit the E-Rate program's FCC Form 471 Filing page for additional information.
FCC FORM 471 APPLICATION FILING WINDOW	E-Rate	The period, generally between mid-January and mid-March prior to the start of the funding year, when applicants request E-Rate program support. See also FCC Form 471.

Terms	Programs	Definitions
FCC FORM 472 (BILLED ENTITY APPLICANT REIMBURSEMENT (BEAR) FORM)	E-Rate	An FCC form that E-Rate program applicants submit to USAC after paying for services in full to request reimbursement for the discount on those services. Applicants may visit E-Rate's applicant invoicing page for additional details about the BEAR invoicing method.
FCC FORM 473 (SERVICE PROVIDER ANNUAL CERTIFICATION (SPAC) FORM)	E-Rate	An FCC form that service providers file annually to certify their compliance with E-Rate program rules and guidelines. The form must be filed before USAC will pay invoices.
FCC FORM 474 (SERVICE PROVIDER INVOICE (SPI) FORM)	E-Rate	An FCC form that service providers submit to USAC to request reimbursement for discounted eligible services provided to E-Rate program applicants. Service providers may visit E-Rate's service provider invoicing page for additional details about the SPI invoicing method.
FCC FORM 479 (CERTIFICATION BY ADMINISTRATIVE AUTHORITY TO BILLED ENTITY OF COMPLIANCE WITH THE CHILDREN'S INTERNET PROTECTION ACT FORM)	E-Rate	An FCC form that E-Rate consortium members (the administrative authority for CIPA purposes) submit annually to their consortium leader to certify that they are in compliance with CIPA. After all FCC Forms 479 are collected, the consortium leader can complete the FCC Form 486. See also Children's Internet Protection Act.
FCC FORM 486 (RECEIPT OF SERVICE CONFIRMATION AND CHILDREN'S INTERNET PROTECTION ACT CERTIFICATION FORM)	E-Rate	An FCC form that E-Rate program applicants file to inform USAC that services have begun and confirm their compliance with CIPA. It must be completed prior to filing a BEAR Form (FCC Form 472) or SPI Form (FCC Form 474) to request reimbursement. See also Children's Internet Protection Act.
FCC FORM 486 NOTIFICATION LETTER	E-Rate	A letter USAC issues to E-Rate program applicants and service providers to indicate that an FCC Form 486 has been successfully processed and invoicing may begin.

Terms	Programs	Definitions
FCC FORM 498	E-Rate, Rural Health Care, High Cost, Service Providers	The FCC form that telecommunications service providers must submit to participate in any of the universal service programs. The form collects contact, remittance, and payment information. Upon completion, the service provider is assigned a nine-digit unique identifier referred to as a 498 ID/Service Provider Identification Number (SPIN). Note: Applicants to the E-Rate program who choose the FCC Form 472 (Billed Entity Applicant Reimbursement (BEAR) Form) payment method must also have filed the FCC Form 498.
FCC FORM 498 COMPANY OFFICER	E-Rate, Rural Health Care, High Cost, Service Providers	See 498 Company Officer.
FCC FORM 498 DELEGATED USERS	E-Rate, Rural Health Care, High Cost, Service Providers	See Authorized Users.
FCC FORM 498 GENERAL CONTACT	E-Rate, Rural Health Care, High Cost, Service Providers	See General Contact.
FCC FORM 500 (FUNDING COMMITMENT ADJUSTMENT REQUEST FORM)	E-Rate	An FCC form that E-Rate program applicants file to submit changes to funding requests after USAC has issued commitments for those requests, including: adjusting the funding year service start date, adjusting the contract expiration date, cancelling an FRN, reducing an FRN, or requesting a service delivery extension.
FCC REGISTRATION NUMBER (FCC RN)	E-Rate, Rural Health Care, High Cost, Service Providers	A 10-digit number assigned by the FCC to a business or individual that registers with the commission. It is associated with an entity’s Taxpayer Identification Number (TIN) and is required before filing FCC Forms 499-A/Q. Originally called CORES ID.

Terms	Programs	Definitions
FEDERAL COMMUNICATIONS COMMISSION (FCC)	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	An independent agency of the U.S. government established in 1934. The FCC is charged with regulating interstate and international communications by radio, television, wire, satellite, and cable in all U.S. states and territories. In 1997, the FCC designated USAC to be the independent not-for-profit corporation to administer the universal service fund, in accordance with its rules. The Commission oversees USAC's administration of the USF.
FSCS CODES	E-Rate	An identifying code for public libraries issued by the Federal State Cooperative System (FSCS), a cooperative program between the federal government and the states. FSCS data on public libraries is received from the Institute of Museum and Library Services (IMLS).
FUNDING COMMITMENT DECISION LETTER (FCDL)	E-Rate	A letter sent to E-Rate program applicants and service providers that details USAC's funding decisions. FCDLs are issued in EPC after USAC completes its PIA review. See also Program Integrity Assurance.
FUNDING REQUEST NUMBER (FRN)	E-Rate, Rural Health Care	A unique identifier that USAC assigns to funding requests in completed FCC Form 462 (RHC program), FCC Form 466 (RHC program), and FCC Form 471 (E-Rate program) applications.
FUNDING YEAR (FY)	E-Rate, Rural Health Care	The time period during which universal service program support is provided. At USAC, funding years begin on July 1 and end on June 30 of the following calendar year: e.g., FY2026 begins July 1, 2026 and ends June 30, 2027.
GENERAL CONTACT	E-Rate, High Cost, Service Providers	The service provider or applicant employee responsible for filling out the FCC Form 498. The General Contact has a unique level of permission in USAC's E-File system, with the ability to submit forms, modify data, and add or remove authorized users.
GENERAL FINANCIAL CONTACT	E-Rate	A person who is authorized by an E-Rate applicant to retrieve information on the FCC Form 498 and obtain access to EPC. They may complete, but not certify, updates to the FCC Form 498.

Terms	Programs	Definitions
GOVERNMENT ACCOUNTABILITY OFFICE (GAO)	E-Rate, High Cost, Service Providers	An independent, nonpartisan government agency within the legislative branch that reports on the programs and expenditures of the federal government. As the supreme audit authority of the government, it studies how taxpayer dollars are spent, evaluates program outcomes, audits expenditures, and issues legal opinions.
HEAD START	E-Rate	A comprehensive child development program that serves preschool-age children and their families. Head Start facilities in some states are eligible for E-Rate program funding. To see which Head Start programs may receive E-Rate funding, visit the program's Eligibility Table for Non-Traditional Education.
IMPROPER PAYMENT	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	Any payment that should not have been made, or that was made in an incorrect amount under statutory, contractual, administrative, or other legally applicable requirements. Improper payments are subject to IPIA and IPERA rules. USAC calculates estimates of improper payment rates via the PQA program and provides this information to the FCC.
INTERNAL CONNECTIONS	E-Rate	Eligible equipment (such as routers, switches, wireless access points, and cabling) considered necessary to transport or distribute broadband within one or more instructional buildings of a single school campus or within one or more non-administrative buildings that comprise a single library branch. A Category Two service type on the ESL. See also Eligible Services List.
INTERNET SERVICE PROVIDER (ISP)	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	An organization that provides services for connecting to the public internet. For the purposes of universal service support, ISPs may be referred to as service providers. See also Service Provider.

Terms	Programs	Definitions
INVOICE	E-Rate	A statement or document that (1) service providers submit to USAC after they have provided or completed service to the universal service support applicant or (2) applicants submit to USAC after they have paid for services in full. Invoices are submitted using the E-File system.
INVOICE DEADLINE EXTENSION	E-Rate	A single, one-time 120-day extension of the deadline to submit an invoice – FCC Form 472 (BEAR Form) or FCC Form 474 (SPI Form). The extension must be requested on or before the invoice deadline.
INVOICE STATUS REPORT (ISR)	E-Rate	A report sent to E-Rate service providers upon USAC's receipt of an FCC Form 474 (SPI Form). The report identifies which invoice line items were accepted, modified, and/or denied. For additional information about invoicing in E-Rate, visit the program's Electronic Invoicing page.
LEGALLY BINDING AGREEMENT	E-Rate	An agreement, enforceable by law, between two or more parties that creates an obligation to do, or not do, something. Also known as a contract. Contract definitions and requirements are contained in each state or territory's contract law.
LETTER OF AGENCY (LOA)	E-Rate, Rural Health Care	A document authorizing the project coordinator of a consortium leader to apply for universal service support on behalf of other members of the consortium. A LOA may also authorize a consultant to act on behalf of an applicant or service provider.
LIBRARY SERVICES AND TECHNOLOGY ACT (LSTA)	E-Rate	The federal law, 20 U.S.C. Section 9121 et seq., that provides the statutory definition of a library.
LOCAL AREA NETWORK (LAN)	E-Rate	A data network that provides connections generally within an eligible school or library to other locations within the school or library.

Terms	Programs	Definitions
LOWEST CORRESPONDING PRICE (LCP)	E-Rate	The lowest price that a service provider charges to non-residential customers who are similarly situated to a particular E-Rate program applicant (school, library, or consortium) for similar services.
MANAGED INTERNAL BROADBAND SERVICES (MIBS)	E-Rate	Services provided by a third party for the operation, management, and monitoring of internal connections components. E-Rate support is limited to eligible expenses or portions of expenses that directly support and are necessary for broadband connectivity within schools and libraries. A Category Two service type on the ESL. See also Eligible Services List.
MANAGED WI-FI	E-Rate	See Managed Internal Broadband Services (MIBS).
MINI-BID	E-Rate	An evaluation process used by E-Rate applicants when a state files an FCC Form 470 and signs state master contracts with more than one service provider. The applicant must evaluate all eligible state master contracts by determining the factors to use for its evaluation, with the price of eligible equipment and services as the most heavily-weighted factor, and demonstrate why the service provider it chooses is the most cost-effective solution.
MINISTERIAL AND CLERICAL (M&C) ERRORS	E-Rate, Rural Health Care	Also known as M&C errors, these are data entry mistakes: e.g., mistyping a number or incorrectly calculating arithmetic. M&C errors on FCC forms may be corrected after the forms are certified by USAC.
NATIONAL SCHOOL LUNCH PROGRAM (NSLP)	E-Rate	A federal program that provides school lunches to eligible students at a free or reduced rate. A school system's NSLP participation rate (i.e., the number of students enrolled in the NSLP divided by the total student population) is one measure of poverty that schools may use to calculate their discount rates in the E-Rate program. For additional information about discount calculations in E-Rate, visit the program's Calculating Discounts page.

Terms	Programs	Definitions
NCES CODES	E-Rate	An identification code for public schools issued by the National Center for Education Statistics (NCES), the primary federal entity for collecting and analyzing data related to education. Private schools may also request NCES codes.
NEWS BRIEF	E-Rate	A monthly newsletter that provides up-to-date E-Rate program information, including important dates, tips regarding the application process, and other breaking news. Visit E-Rate's News Brief page to view past News Briefs and subscribe.
NON-DISCOUNT PORTION	E-Rate	An applicant's share of the cost of eligible equipment and services in the E-Rate program. Also known as the non-discount share, this is the amount the applicant pays after all E-Rate program discounts are applied.
NON-INSTRUCTIONAL FACILITY (NIF)	E-Rate	A school building without classrooms or a library building without public areas. Examples of school NIFs include administrative buildings, bus barns, and cafeteria facilities. Examples of library NIFs include administrative buildings, bookmobile garages, and interlibrary loan facilities. NIFs are eligible to receive E-Rate program discounts on Category One services only. Visit the E-Rate program's NIFs page for additional information.
NOTICE OF PROPOSED RULEMAKING (NPRM)	E-Rate, Rural Health Care, High Cost, Service Providers	An FCC proposal for new rules or changes to existing rules. Following the issuance of an NPRM, the FCC will seek public comments on the proposal.
OFFICE OF MANAGEMENT AND BUDGET (OMB)	E-Rate, High Cost, Service Providers	Part of the Executive Office of the President, OMB reviews and approves FCC forms that are used by USF contributors and universal service program participants, contributors, and service providers.

Terms	Programs	Definitions
ONE PORTAL	USAC General, E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	USAC's single sign-on online dashboard for accessing systems such as EPC, the National Verifier, NLAD, LCS, and RAD, as well as the E-File forms submission tool and many invoicing functions. Certain payment processes are also handled through One Portal. Accessible at https://forms.universalservice.org/portal/login.
OPEN DATA	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	A web portal with datasets and tools available for universal service program data. Users can view, search, filter, and manipulate the data in each dataset and extract that data in a variety of formats. Users can also extract data via API calls. Accessible at https://opendata.usac.org/.
OPERATIONAL SPIN CHANGE	E-Rate	A change by an E-Rate applicant to the service provider on one or more FRNs as a result of a change in the service provider providing the services. Visit the E-Rate program's Operational SPIN Changes page for additional information.
PAYMENT QUALITY ASSURANCE (PQA) PROGRAM	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	A USAC program that assesses payments made to universal service support recipients to determine if the payments were made in accordance with FCC rules. Following these assessments, USAC estimates improper payment rates and provides this information to the FCC.
PREPARER	E-Rate, High Cost, Service Providers	The employee of a telecommunications company that filed FCC Form 499-A/Q who has access to submit and modify data in USAC's E-File system.
PRICING TRANSPARENCY	E-Rate	Provides greater visibility into pricing and technology choices by applicants. Information and pricing regarding the specific services and equipment purchased by schools and libraries are publicly available on USAC's website.

Terms	Programs	Definitions
PROGRAM INTEGRITY ASSURANCE (PIA)	E-Rate	The E-Rate program's process for reviewing FCC Forms 471 to ensure compliance with FCC and program rules. These reviews must be completed before USAC makes funding commitments. USAC sends all communications about PIA through EPC. For additional information about E-Rate's PIA process, visit the program's Application Review page.
PUBLIC NOTICE (PN)	E-Rate, High Cost, Service Providers	A notice issued by the FCC alerting the public of an action taken, a change made, or an upcoming event. PNs are used to announce NOIs, NPRMs, and FNPRMs (Further Notices of Proposed Rulemaking).
QUARTERLY DISBURSEMENT REPORT	E-Rate	A report issued by USAC to E-Rate applicants detailing all invoicing activity for all funding years that occurred during the previous quarter.
RECEIPT ACKNOWLEDGMENT LETTER (RAL)	E-Rate	A letter sent to E-Rate applicants and service providers indicating that a filed FCC Form 471 has been certified. The RAL provides means to correct any mistakes before the FCC Form 471 undergoes PIA review. Visit the E-Rate program's FCC Form 471 Filing page for additional information.
RECOVERY OF IMPROPERLY DISBURSED FUNDS (RIDF)	E-Rate	A letter sent to impacted parties seeking to recover disbursed funds. A RIDF letter is issued when the original approved commitment is correct, but funds were disbursed in error. If no action is taken, demand payment letters will follow providing an opportunity to return the funds. Visit the E-Rate program's Commitment Adjustment page for additional information.
RED LIGHT RULE	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	A requirement that the FCC withhold action on a universal service support application, payment, and/or other requests for benefits when the universal service program participant is delinquent in non-tax debts owed to the FCC or other federal agencies. This rule requires that USAC suspend support to any entity that shares a Tax Identification Number with a company that has a delinquent debt. See also Red Light Status.

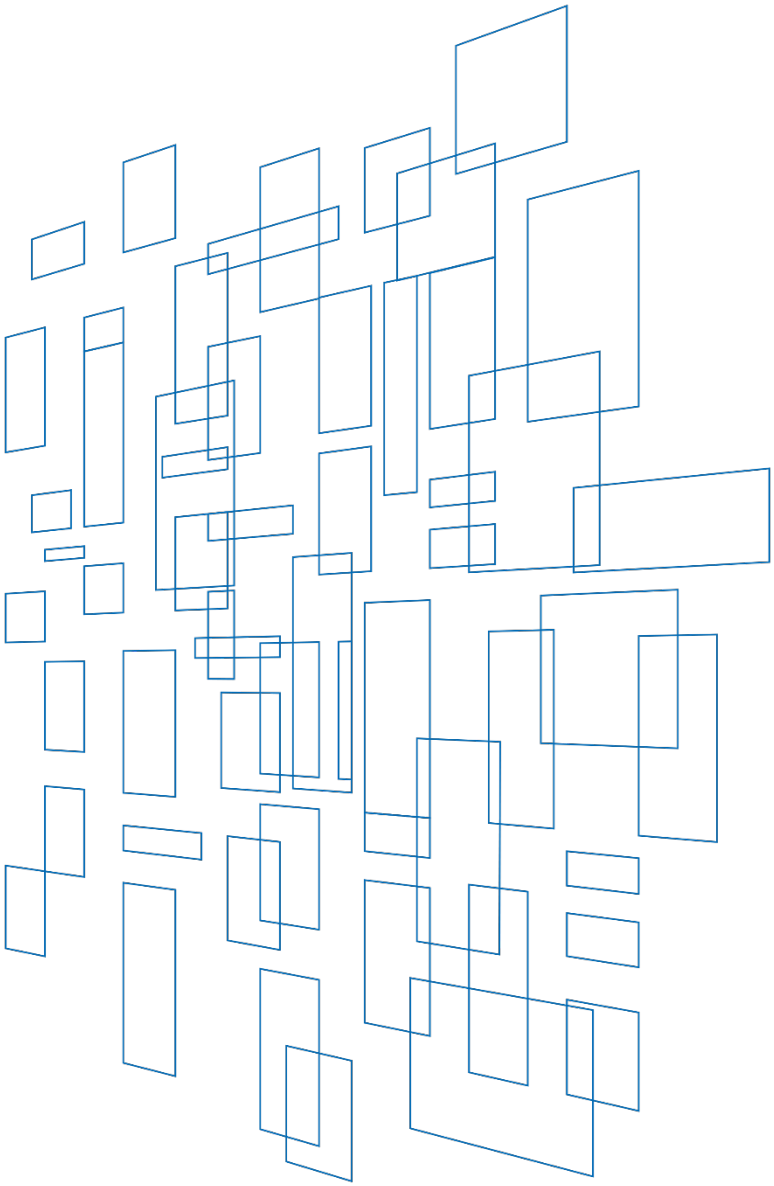
Terms	Programs	Definitions
RED LIGHT STATUS	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	The status of an entity deemed to have violated the Red Light Rule. USAC will not make any disbursements until the entity's delinquency is satisfied, payment arrangements are made, or the Red Light Status is otherwise resolved. See also Red Light Rule.
REMAND	E-Rate	Action taken by the FCC to return applications to USAC for further review.
REQUEST FOR PROPOSAL (RFP)	E-Rate, Rural Health Care	A formal bidding document describing a project and/or requested services in sufficient detail so that potential bidders understand the scope, location, and any other requirements. In the E-Rate and RHC programs, applicants are required to submit an RFP with their universal service support applications under certain conditions. Visit the E-Rate program's Competitive Bidding page for additional detail.
REVISED FUNDING COMMITMENT DECISION LETTER (RFCDL)	E-Rate	A letter USAC issues to E-Rate applicants and service providers when changes to a funding commitment occur, such as the result of an appeal.
SCHOOL OR LIBRARY OFFICIAL	E-Rate	A person who occupies a position of authority for an E-Rate applicant and is responsible for certifying that the information provided on the FCC Form 498 is true, accurate, and complete. This role typically falls to a superintendent, principal, library director, or other administrator and cannot be assigned to a consultant.
SCHOOLS AND LIBRARIES CYBERSECURITY PILOT PROGRAM (PILOT PROGRAM)	E-Rate	A three-year, $200 million FCC program that will evaluate the effectiveness of using Universal Service funding to support cybersecurity services and equipment to protect school and library broadband networks and data. Open to schools, libraries, and consortia of schools and libraries that meet the E-Rate program's eligibility requirements, the Cybersecurity Pilot Program accepted applications in 2024 and announced the applicants selected to participate in early 2025.

Terms	Programs	Definitions
SELECTIVE REVIEW	E-Rate	A component of the E-Rate program's PIA review that follows up on certifications that applicants make on their FCC Forms 471 about the competitive bidding process and the necessary resources to make effective use of requested services. See also Program Integrity Assurance.
SELECTIVE REVIEW INFORMATION REQUEST (SRIR)	E-Rate	A request for information sent to E-Rate applicants when they have been chosen for Selective Review. See also Selective Review.
SERVICE END DATE	E-Rate, Rural Health Care	The date that services will end for an FRN. Also referred to as Service Delivery Deadline, this date aligns with the end of the funding year (June 30) for which support is sought. USAC may adjust this date if it identifies a program violation or a missed deadline.
SERVICE PROVIDER	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	A telecommunications company that participates in at least one of the four universal service programs and provides voice or internet services, equipment, hardware, or software. Types of companies include but are not limited to: competitive access/competitive local exchange carriers (cellular, personal communications, or specialized mobile radio providers), incumbent local exchange carriers, interexchange carriers, internet service providers, interconnected VoIP providers, local resellers (coaxial cable, non-traditional, operator, paging, messaging, payphone, prepaid card, private, and satellite service providers), shared-tenant service providers or building local exchange carriers, SMR (dispatch), toll resellers, or wireless data providers.
SERVICE PROVIDER IDENTIFICATION NUMBER (SPIN)	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	See 498 ID/Service Provider Identification Number (SPIN).
SERVICE START DATE	E-Rate, Rural Health Care	The date that services will commence for an FRN. USAC may adjust this date if it identifies a program violation or a missed deadline.

Terms	Programs	Definitions
SERVICE SUBSTITUTION	E-Rate, Rural Health Care	A change in the equipment or services originally requested for an FRN. For additional detail on service substitutions in E-Rate, visit the program's Service Substitutions page.
SPAC – FCC FORM 473	E-Rate	See FCC Form 473.
SPI – FCC FORM 474	E-Rate	See FCC Form 474.
STATE MASTER CONTRACT (SMC)	E-Rate	A contract that is competitively bid and that a state government implements which can be used by eligible entities within the state to procure equipment or services, or both. Visit the E-Rate program's State Master Contracts page for additional detail about considering an SMC as a bid for service.
STATE REPLACEMENT CONTRACT	E-Rate	A state master contract, filed pursuant to a state-filed FCC Form 470, which can replace an existing state master contract that expires before the end of the upcoming funding year.
TELECOMMUNICATIONS	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	The transmission, between or among points specified by the user, of information of the user's choosing, without change in the form or content of the information as sent and received.
TELECOMMUNICATIONS CARRIER	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	See Common Carrier.
TRIBAL LIBRARY E-RATE ADVOCACY PROGRAM (T-LEAP)	E-Rate, Tribal Nations	A program to support Tribal E-Rate applicants in the E-Rate application process. T-LEAP matches participating public Tribal libraries and Tribal College and University libraries with their own Tribal Library Advocate (TLA) who provides one-on-one assistance in preparing E-Rate applications, applying to the program, invoicing, and performing other post-commitment processes. For more information about T-LEAP and to register, visit USAC's T-LEAP page.

Terms	Programs	Definitions
UNIVERSAL SERVICE	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	The principle that all people in the United States should have access to telecommunications (voice and internet) services at reasonable rates. The USF, and later USAC, were established by the FCC to achieve this objective.
UNIVERSAL SERVICE ADMINISTRATIVE COMPANY (USAC)	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	The independent not-for-profit organization designated by the FCC as the neutral, third-party administrator of the USF and its four programs. Collectively, the fund disbursed more than $8.5 billion in universal service support in 2024.
UNIVERSAL SERVICE FUND (USF)	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	Money collected from telecommunications companies and allocated to the objective of achieving universal service, per the 1996 Telecommunications Act. All interstate and international voice carriers operating in the U.S. must make contributions to the USF equal to a percentage of their interstate end-user revenues. The FCC updates this percentage, known as the contribution factor, quarterly. USAC's role is to collect and disburse the USF.
URBAN/RURAL STATUS	E-Rate	A designation for E-Rate program applicants based on U.S. Census data. Entities in areas defined as rural by the FCC are entitled to additional E-Rate program funding in certain circumstances. Visit the E-Rate program's Urban/Rural Status page for additional details.
WAVE	E-Rate	A group of funding commitment notifications that USAC issues to E-Rate applicants and service providers on a given date. Waves are usually issued weekly.
WHISTLEBLOWER ALERT	E-Rate, Rural Health Care, Lifeline, High Cost, Service Providers	A hotline allowing members of the public to anonymously report suspected violations of universal service program rules to USAC. These reports can be made anonymously via the USAC Whistleblower Alert Form, by emailing WhistleblowerReports@usac.org, by calling (888) 203-8100, or by U.S. mail to: Attn: Fraud Risk GroupUniversal Service Administrative Co.700 12th Street, NW, Suite 900 Washington, DC 20005

Terms	Programs	Definitions
WIDE AREA NETWORK (WAN)	E-Rate	A data* network that provides connections from within a school or library to other locations beyond the school or library. *The voice and video components of a WAN are not eligible for E-Rate discounts.



Schools and Libraries (E-Rate) Program Overview

Revised May 2025

Universal Service Administrative Co.

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Program Overview

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

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

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

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

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

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

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

The Eligible Services List

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

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

Certify FCC Form 470 to Open Competitive Bidding for Desired Services

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Appeals

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

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

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

Other Forms

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

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

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

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

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

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

Retention of Records and Audits

Program participants must maintain all E-Rate program records for at least 10 years after the latter of

the last day of the applicable funding year or the service delivery deadline for the funding request, whichever is later, to be in compliance with program rules. The records must be made available if requested for audits or other inquiries or investigations.

How to Get More Information

All of the material covered in this overview is available on USAC's website at USAC.org.

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

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

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

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

E-Rate Program Timetable and List of Deadlines

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

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

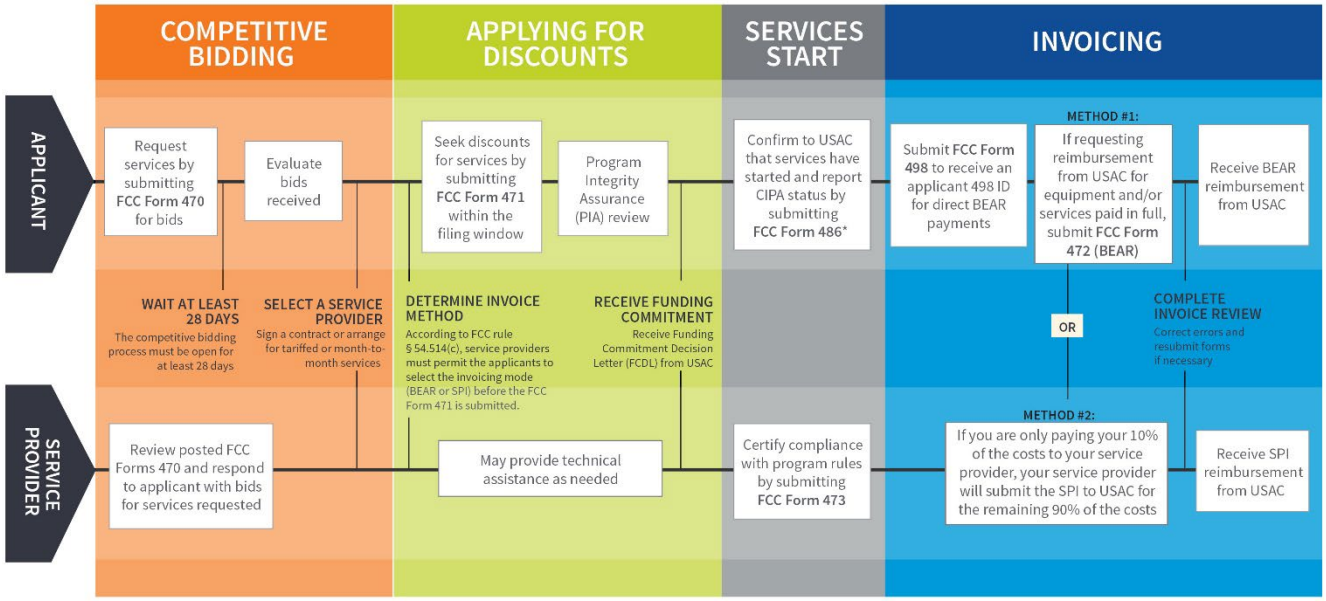
*All deadlines are moved to the next business day if the deadline falls on a weekend or federal holiday.

Universal Service Administrative Co.

Schools and Libraries (E-Rate) Program
APPLICATION PROCESS

BEFORE YOU BEGIN:

APPLICANTS: Applicants must first have an entity number and an E-rate Productivity Center (EPC) account.
SERVICE PROVIDERS: Service providers must first obtain a Service Provider Identification Number (SPIN /service provider 498 ID) by submitting FCC Form 498.



FOR MORE INFORMATION:

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

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