Applicant Process

Before You Begin

Step 1: Create an EPC Account

Step 2: Competitive Bidding

FCC Form 470 Filing

Letter of Agency (LOA)

Ministerial & Clerical Errors

Open & Fair Process

Free Services Advisory

Consultant Registration Numbers

28-Day Waiting Period

Requirements for Leased Dark Fiber & Self-Provisioned Networks

Gift Rules

Competitive Bidding Exemptions

Step 3: Select Service Providers

Step 4: Apply for Discounts

Step 5: Application Review

Step 6: Start Services

Step 7: Invoice USAC

Before You're Done

‹ Step 1 Step 3 ›

Step 2: Competitive Bidding

What is Competitive Bidding?

Competitive bidding is a formal process to identify and request equipment and services the applicants need, so that potential service providers can review those requests and submit bids for them.

Additional Resources

Competitive Bidding Infographic

Competitive Bidding FAQs

This process is designed to be fair and open, and requires the applicant to select the most cost-effective provider based on its bid evaluation factors. The price of the eligible equipment and services must be given the most weight during the bid evaluation process.

The entity that will run the competitive bidding process may include an applicant, a state procurement agency, or another entity that an applicant has authorized to negotiate on its behalf with a Letter of Agency (LOA). This entity must certify an FCC Form 470 (Description of Services Requested and Certification) in the E-Rate Productivity Center (EPC) and must be prepared to receive and evaluate bids and negotiate with service providers.

Filing an FCC Form 470

The FCC Form 470 for the upcoming funding year is generally available in EPC one year before the start of the funding year.

Services provided under tariff or on a month-to-month basis, require an FCC Form 470 to be posted each year. However, if a multi-year contract results from a completed competitive bidding process, it is not necessary to post a new FCC Form 470 in subsequent funding years until the existing contract has expired and a new contract is required.

After the FCC Form 470 is certified, USAC will issue an FCC Form 470 Receipt Notification Letter (RNL) in the entity's EPC News feed. Applicants can edit some fields in a certified FCC Form 470. Allowable changes include:

- editing an application name
- changing the main contact person and/or technical contact person
- making minor, non-substantial updates to a request for proposal (RFP)

Applicants must wait at least 28 days from the date the FCC Form 470 is certified before closing the competitive bidding process. Changes to the FCC Form 470 that materially affect the competitive bidding process require applicants to restart the 28-day waiting period before selecting a service provider, signing a contract, or certifying an FCC Form 471.

If a consultant is assisting you with the application process, you must go to your organization profile in EPC, add your consultant in the **Manage Your Organization Relationships** area of your EPC account, and identify your consultant on your FCC Form 470.

Requests for Proposals

The entity filing an FCC Form 470 may also issue an RFP, in addition to the FCC Form 470. In general, an RFP is a formal bidding document that describes the project and requested equipment and services in sufficient detail, so that potential bidders understand the scope, location, and any other requirements. However the term "RFP" or "RFP document" generically means any bidding document that describes the applicant's project and requested equipment and services in more detail than in the fields provided on the FCC Form 470.

E-Rate program rules do not require applicants to issue an RFP. Generally, an applicant is not required to issue an RFP unless it is a requirement of that entity's state or local procurement rules or regulations. However, an entity that has issued or will issue an RFP, must upload that document concurrently with the FCC Form 470 in EPC. Do not upload a document containing a link to the RFP. The actual RFP or RFP document must be uploaded with the FCC Form 470.

EPC requires an RFP to provide more details with your FCC Form 470 if you are requesting the options for:

- "Leased Dark Fiber and Leased Lit Fiber"
- "Self-Provisioned Network and Services Provided Over Third Party Networks"
- "Network Equipment"
- "Maintenance & Operations"
- "Cellular Data Plan/Air Card Service"
- "Other"

Open and Fair Competitive Bidding Process

The entity filing the FCC Form 470 must ensure that the competitive bidding process is open and fair:

- All bidders must be treated the same.
- No bidder can have advance knowledge of the project information.
- There are no secrets in the process – such as information shared with one bidder but not with others – and all bidders must know what is required of them and information must be shared with all bidders.

- With limited exceptions, service providers and potential service providers cannot give gifts to applicants.
- In addition, the value of free equipment and services (e.g., price reductions, promotional offers, free equipment) generally must be deducted from the pre-discount cost of funding requests.

Next Steps

Once the competitive bidding process has closed, the entity that filed the FCC Form 470 must evaluate the bids received and select the service provider(s) that will provide the requested equipment and services as described further in the next step, Selecting Service Providers.

Source: https://www.usac.org/e-rate/applicant-process/competitive-bidding/ · page last modified Aug 5, 2026 · captured Nov 1, 2026

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

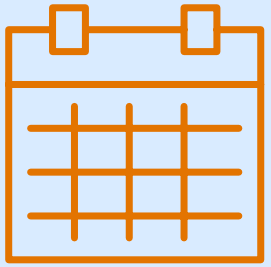
3 Ensure an open and fair process
- Provide any FCC Form 470, RFP and other information/updates in EPC for all potential bidders for at least 28 days
- "Open" means there are no secrets in the process and that all bidders know what is required of them
- "Fair" means that all bidders are treated the same 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 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: 8/28/2024

Available for Public Use

FAQs
Learn
Videos
Webinars
E-Rate News Brief
In-Person E-Rate Training Events
EPC Training Site
FAQs
All Topics
Basic Maintenance of Internal Connections (BMIC)
Calculating Discount Rates
Competitive Bidding & FCC Form 470
Consortia
Eligible Fiber Services
Eligible Services
Library
Low Cost High Speed Internet Access
Non-Instructional Facilities (NIFS)
Tribal Applicants

FAQs

Competitive Bidding & FCC Form 470

Q1: When can I file an FCC Form 470?

A1:
You can file an FCC Form 470 for FY2025 now. The FCC Form 470 for FY2025 became available on September 19, 2024.

Q2: What is an RFP and is one required?

A2:
A Request for Proposal (RFP) is a detailed form of solicitation for equipment and services that provides any additional details necessary for potential bidders to respond. Program applicants may issue RFPs in addition to filing the FCC Form 470. An RFP may be known by a variety of names, for example, an Invitation for Bids (IFB) or Request for Quotes (RFQ). In most instances, RFPs are not specifically required as part of the E-Rate program, but you must issue one if it is required by FCC rules or by your state or local competitive bidding or procurement rules. If you are issuing an RFP and/or one or more RFP documents, you are required to upload those documents to your FCC Form 470. Applicants should make sure their latest RFP is available for a full 28 days before selecting a service provider.

Q3: How do I count the 28-day competitive bidding waiting period? Do I exclude weekends and holidays?

A3:
The 28-day waiting period starts the calendar day (including weekends and holidays) you certify your FCC Form 470. The day you certify the form is day one. For example, if you certify on 1/1/2024, your Allowable Contract Date is 1/29/2024. The Allowable Contract Date (ACD) is the earliest date on which an applicant can sign a contract for contracted services or enter into an arrangement for tariffed (T) or month-to-month (MTM) services with a service provider. The ACD can be found in the Receipt Notification Letter posted on your News tab in EPC. The letter is posted shortly after you certify your FCC Form 470.

- To assist applicants and ensure they meet their 28-day minimum, EPC calculates the date when their 28-day waiting period ends.

- Applicants now have the ability to add a new RFP to any non-cancelled FCC Form 470 in EPC. In doing so they are prompted to answer the substantial change question. If they answer yes, then the ACD is automatically recalculated. See the FCC Form 470 Allowable Contract Date Changes slides in E-Rate Program Overview 2024 Applicant and Service Provider Training presentation.
- Remember, the 28-day waiting period is a **minimum requirement**. You can wait longer than 28 days.
- For more information and to view the ACD infographic, please visit the 28-Day Waiting Period page.

Q4: What changes can I make to my FCC Form 470?

A4:
You can make the following changes to a certified FCC Form 470:

- Edit the nickname you created for your form.
- Change the main contact person on the form.
- Edit the technical contact person you identified on the form.
- Add an RFP document.
    - For FY2025, users can now upload an RFP document to any non-canceled Form 470, even if that Form 470 did not originally have an RFP. This grants applicants more flexibility if they need to make a change to their form.

Q5: How do I make corrections to the FCC Form 470?

A5:

- Navigate to the form in EPC. You can do this in two ways:
    - Go to the bottom of your landing page and search for and locate your form using the search criteria provided, or
    - Click the **Records** tab, choose **FCC Forms 470**, and use the search criteria provided to locate your form.
- Choose **Related Actions** from the menu.
- Click the link for the action you want to take from the menu.

Q6: My FCC Form 470 does not show the correct number of entities. What do I need to do?

A6:
We strongly recommend updating the entities in your EPC entity profile before you start a form. CSC can help you create entities, add and remove entities, and create annexes as needed. If you do this work before you submit and certify your FCC Form 470, the number of entities should be correct.

However, if your entity count is still not correct, you can add an RFP document to your form to explain the discrepancy (for example, if services are delivered to annexes that have a different address, but EPC did not count them as separate entities).

Q7: What service/function should I list this service/product under on the FCC Form 470?

A7:

You may not be sure exactly where on the FCC Form 470 to list particular equipment or services. If they appear to fit into more than one category of service or service type, you should:

- List the equipment or service under all of the categories or service types where it fits, and
- Provide a detailed explanation of the services you are requesting in the narrative field of the FCC Form 470 and/or your RFP or RFP document.

Q8: Is an FCC Form 470 always required?

A8:

No. There are some limited situations where applicants do not need to submit and certify an FCC Form 470:

- If you have a multi-year contract that is still in effect and the costs/services are still within the terms of the establishing FCC Form 470. However, you do need to file a new FCC Form 471 each funding year and use the prior supporting FCC Form 470.
- Commercially Available Business class Internet Option (CABIO) Category 1 (C1) services are exempt from the FCC Form 470 posting requirement if they meet certain requirements.
- Category Two (C2) equipment or services requested by libraries totaling a pre-discount cost of $3,600 or less annually per library are exempt from the FCC Form 470 posting requirement if they meet certain requirements.

Q9: What if there is only one service provider in my area? Am I still required to file an FCC Form 470?

A9:

Yes. If you are receiving services under tariff or on a month-to-month basis, you must file an FCC Form 470 each year.
You do not have to file an FCC Form 470 if:

- You are under a multi-year contract that covers your services for the upcoming funding year.
- You have a contract with voluntary extensions, and you and your service provider agree to exercise an extension that covers your services for the upcoming funding year.

- You order a commercially available, business-class internet access service that meets specific requirements.

Q10: What should I do if I submitted and certified an FCC Form 470 and left off some services?

A10:

The clearest way to proceed is to submit and certify a new FCC Form 470 and include all of the services you want on that form and its associated RFP and/or RFP documents.

You may also attach one or more RFP documents to your existing form to add the services that were omitted under a particular category of service. Keep in mind that the addition of those services will probably be a substantial change, and you must restart your 28-day waiting period from the date you add the document to your FCC Form 470. For FY2025, if you are making a substantial change, the allowable contract date will automatically update in EPC to extend by 28 days. If you are unsure whether adding a new service is a substantial change, err on the side of caution and restart the 28-day waiting period.

A third option is to submit and certify a new FCC Form 470 that contains only the additional services. If you choose this option, be very clear whether you want bids that include all of the equipment and services in both FCC Forms 470 and if you are willing to accept separate bids for the services included on each form.

For more information on the FCC Form 470 and the competitive bidding process, you can refer to the following resources available on the USAC website:

- Applicant Step 1 – Competitive Bidding
- Applicant Step 2 – Selecting Service Providers
- Instructional videos on how to file the FCC Form 470.

Other guidance documents

- Competitive Bidding Infographic
- Eligible Services Overview
- Document Retention

Q11: What if I don't receive any bids?

A11:

It is possible that a project receives one or no bids. When that happens, you have some options. After waiting the 28 days, you can proactively solicit bids. If you are currently receiving service, you can consider a current bill as a bid response. However, you should confirm that your current provider is willing to continue to provide service and to verify the cost of that service for the upcoming funding year. If you only receive one bid, you can accept it if it's cost effective. You should create a memo to document the situation.

Q12: What can I do if I only receive one bid? Can I choose it?

A12:

Yes, but only if it is cost-effective. If the service does not appear to be cost-effective based on your evaluation, you can solicit bids from other service providers and evaluate those bids as well.

If the bid is cost-effective, send yourself an email or create a memo to the file indicating that you only received one bid. Retain that email or memo and your evaluation with your other competitive bidding documentation.

Q13: Do I have to choose the bid with the lowest price?

A13:

No. You choose the evaluation factor(s) you will use to evaluate the bids you receive. You can choose as many or as few factors as you like.

You must include the **price of the equipment and services** that are eligible for E-Rate discounts as an evaluation factor, and that price factor **must be weighted more heavily than any other single factor** in your evaluation.

You can refer to the USAC website for guidance on constructing an evaluation. That guidance also includes a sample bid evaluation matrix.

Q14: As a service provider, how do I submit a bid on the equipment and services requested?

A14:

As a service provider, you should use the FCC Form 470 tool to search and view certified FCC Form 470 service requests.

Another tool you can use is the Open Data platform. It allows users to view, filter, and search for FCC Forms 470 and extract a variety of data about posted FCC Forms 470 such as the scope of the work, the category of service requested, geographic location, applicant type, and other information.

Once you find a request on which you want to bid, review the FCC Form 470 carefully, especially the narrative sections. Look for any attachments or Request for Proposals, or "RFP documents." Applicants who have specific requirements on preparing and submitting bids should provide that information there.

If there are no specific requirements provided, contact the contact person (or the technical contact person, if one is identified) for any additional information. Do not submit questions or bids directly to USAC.

Q15: Can I submit a bid after 28 calendar days have passed?

A15:

Yes, you may submit a bid after the Allowable Contract Date unless the applicant's requirements state otherwise. However, many applicants may select a service provider **on** the Allowable Contract Date, and applicants are **not**

required to consider bids received after they have selected a service provider.

To avoid confusion, applicants are encouraged to include a date when bids are due or will no longer be considered. Service providers are also encouraged to submit bids within 28 calendar days after an FCC Form 470 is posted as well.

Q16: What do I do if I get "Robobids", SPAM bids, or bids that are not responsive to the equipment and services I am requesting?

A16:

Unresponsive Bids, "SPAM" Bids and "Robobids." All bids received should be retained during the competitive bidding process. Disqualification factors can be applied to bids received that do not meet minimum bid requirements, do not include site- or project-specific details, and/or are not responsive to the applicant's requests. Applicants may include language in their FCC Form 470 narrative or request for proposal (RFP), such as "SPAM and/or robotic responses will not be considered valid bid responses and will be disqualified from consideration." By doing this, applicants can disqualify bids based on this factor. The decision to disqualify any non-responsive bids should also be memorialized and retained to demonstrate compliance with the E-Rate competitive bidding rules.

Source: https://www.usac.org/e-rate/learn/faqs/competitive-bidding-fcc-form-470/ · all answers shown expanded · captured Nov 1, 2026

Available for Public Use



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E-Rate CABIO Internet Bidding Exemption
&
Category 2 Bidding Exemption for Libraries



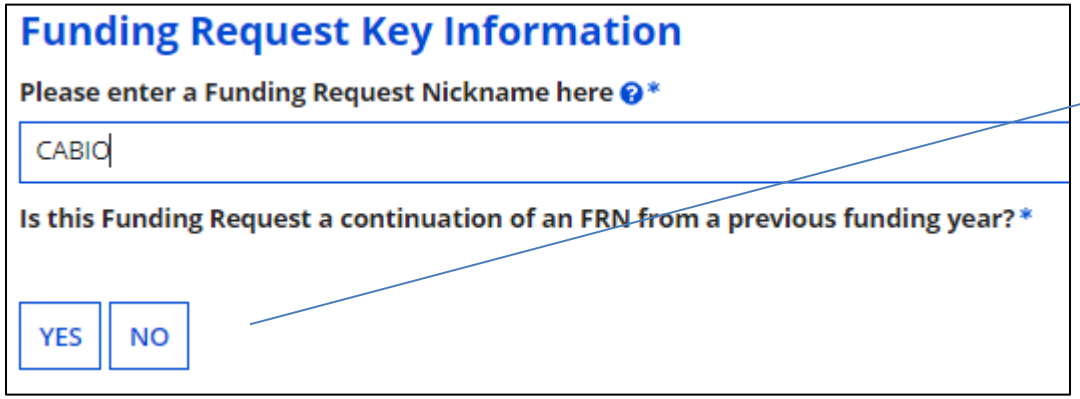
CABIO Internet Bidding Exemption

Commercially Available Bundled Internet Option

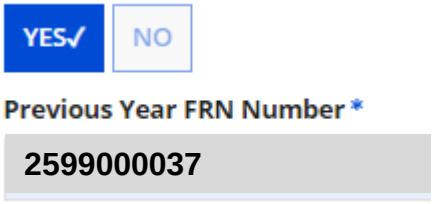
- Schools and libraries seeking "Commercially-Available Business Class Internet Services" are not required to file a Form 470
- **Commercially Available** means that it is publicly available to non-residential customers (such as enterprise, small business, or other government customers) in the same form and at the same rates that it is offered to schools or libraries
  - In layman's terms, this means an internet service that is available on a vendor's website for its business customers.
  - Typically, only Cable-Modem, DSL, or a shared Internet Service
- **Minimum speeds** must be 100 Mbps downstream and 10 Mbps upstream per building
- Prediscount annual cost must be $3,600 or less per building
  - Cost must be per-building and cannot be averaged across multiple buildings
  - $3,600 includes any installation costs, equipment rental, taxes and fees

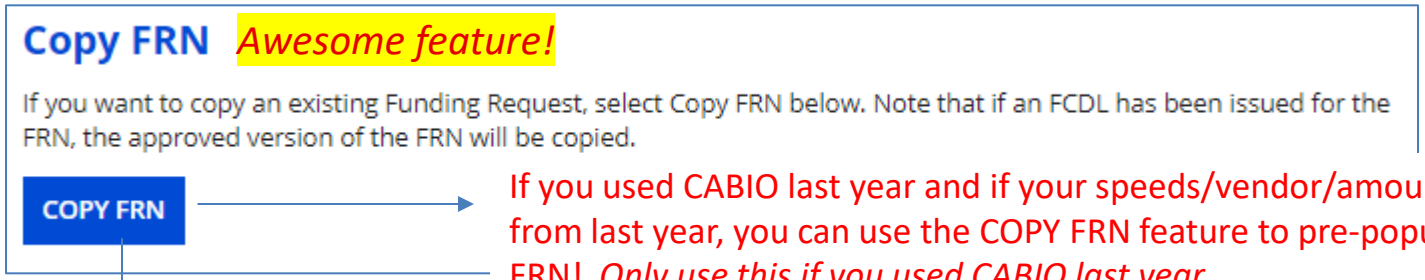
The CABIO option is geared toward small libraries and small schools not on the State Network and that are using cable modem-type services

Form 471 Answers for CABIO

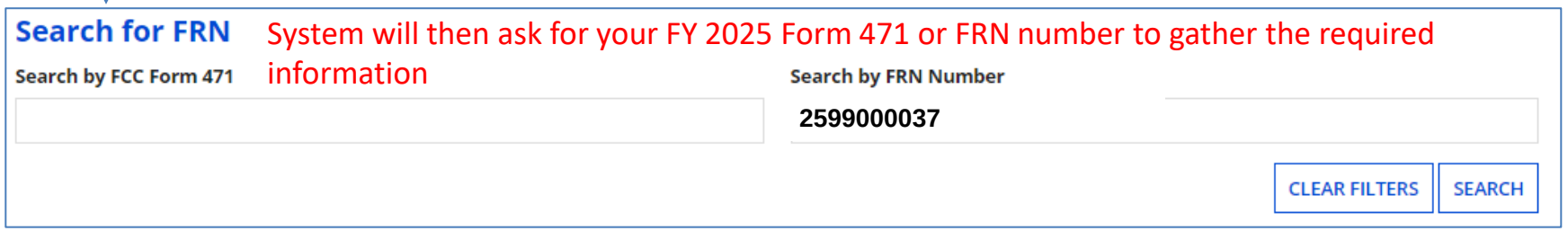


If you mark YES, system will ask for your FY 2025 FRN number





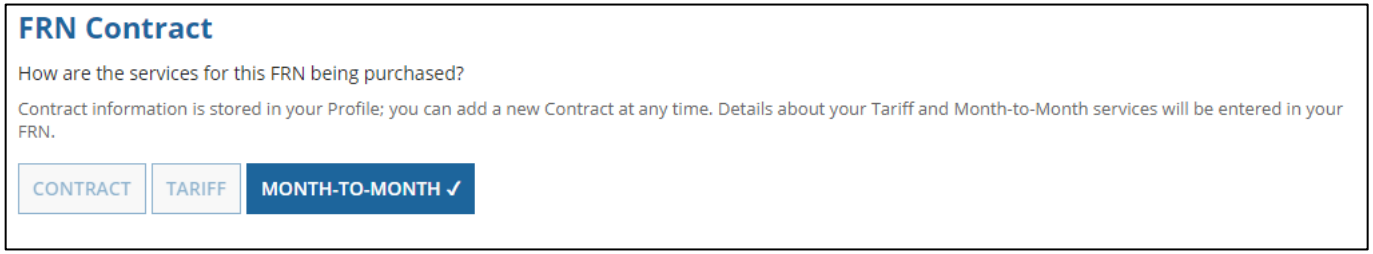
If you used CABIO last year and if your speeds/vendor/amounts haven't changed from last year, you can use the COPY FRN feature to pre-populate your FY 2025 FRN! *Only use this if you used CABIO last year.*



System will then ask for your FY 2025 Form 471 or FRN number to gather the required information

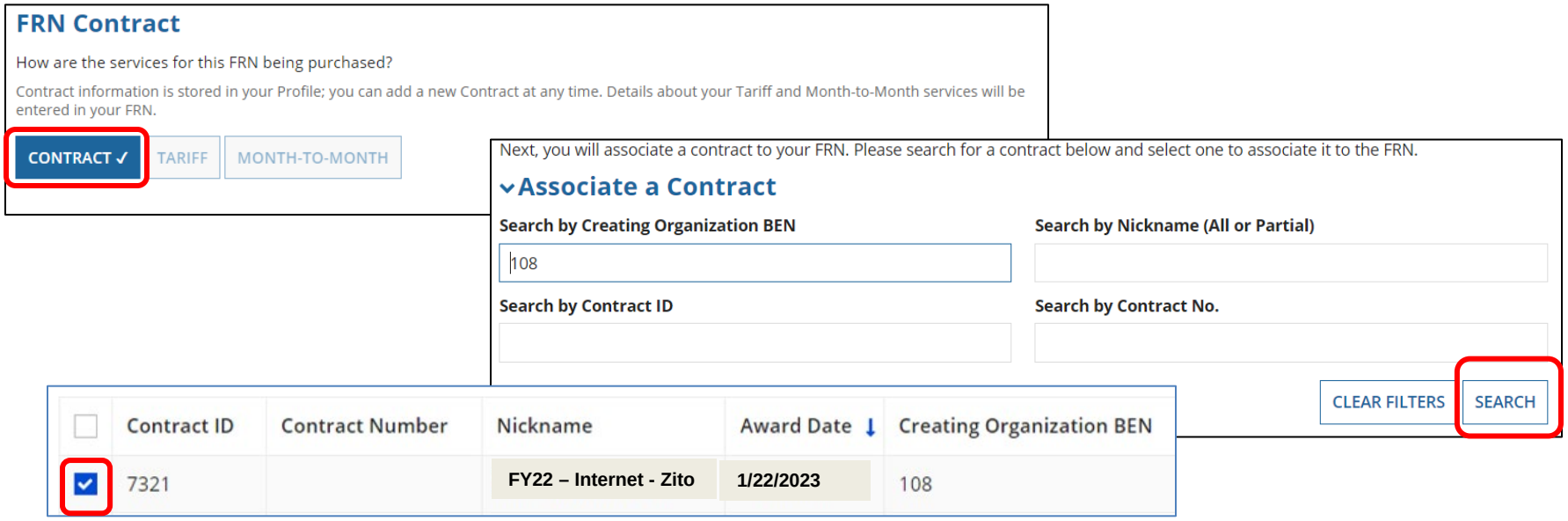
CABIO, MTM Services

- MTM Services: Applicants can elect to purchase CABIO services on a month-to-month basis and not sign a contract
  - Proceed directly to the Form 471

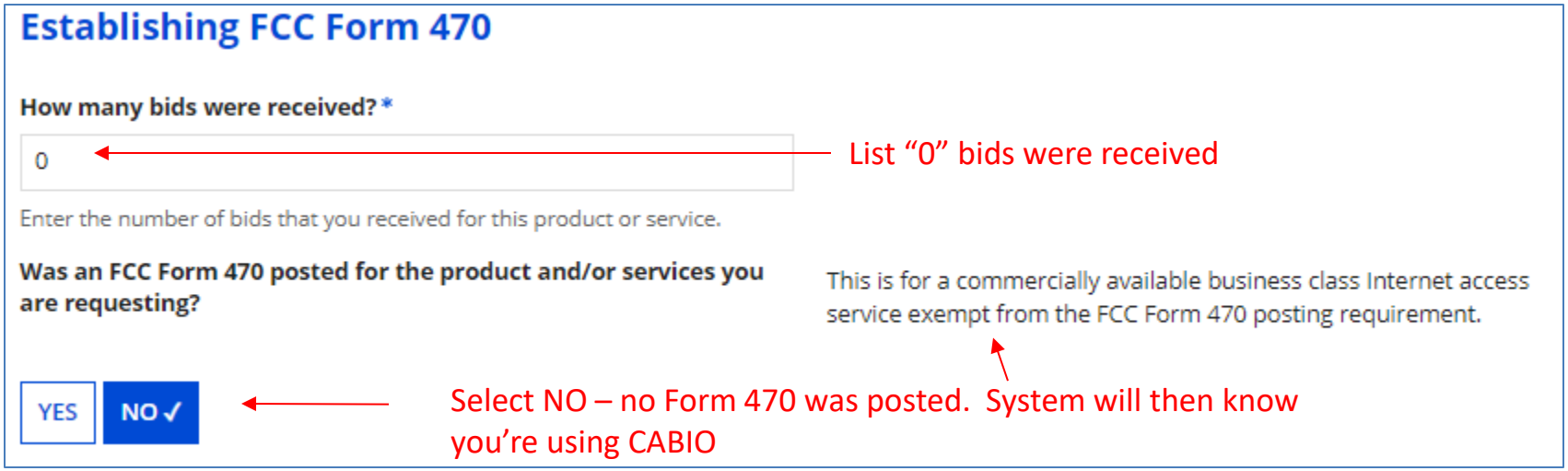


CABIO, Contracted Services

- Contracted Services: Applicants using CABIO *may* sign multi-year or one-year vendor contracts, but they're not required
  - If a new contract is signed, the applicant should first create a Contract Record in EPC, then proceed to the Form 471 and follow these steps on the Form 471 to link the FRN to the Contract Record:



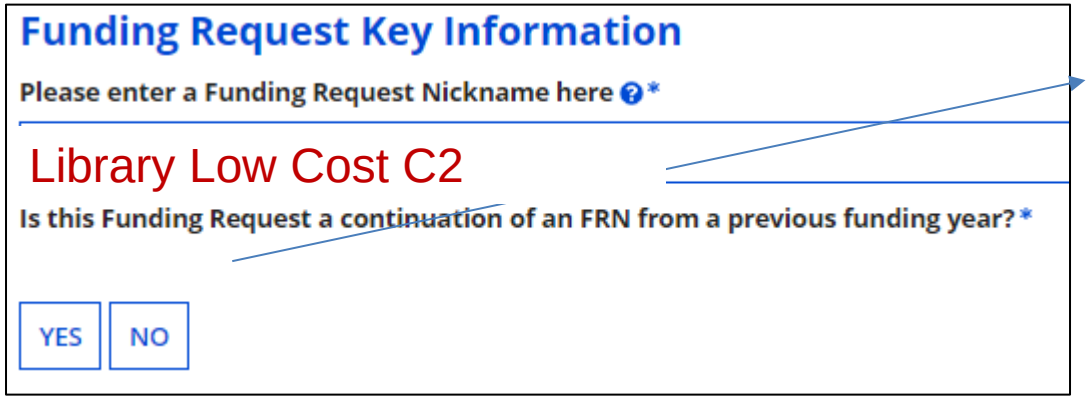
More Form 471 Answers



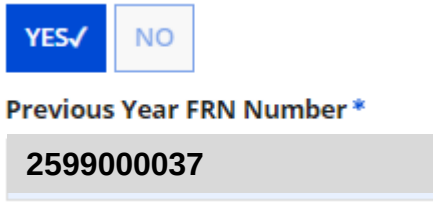
Libraries Low Cost C2 Bidding Exemption (LLCC2)

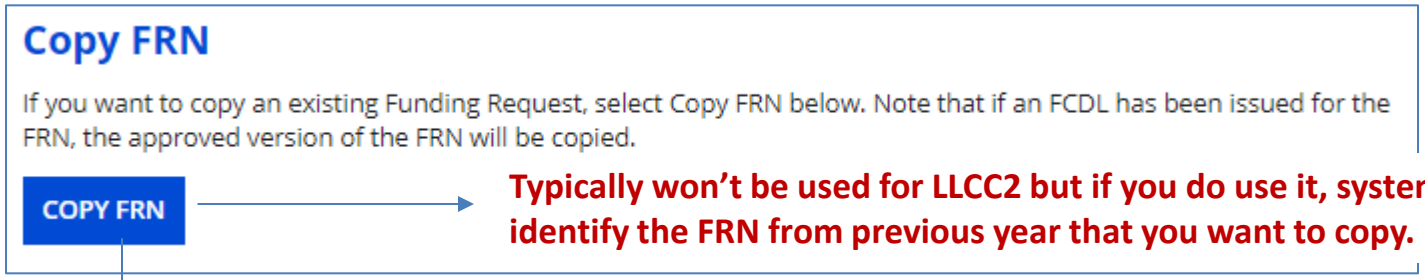
- Beginning in FY 2024, libraries that apply for C2 funding that totals a pre-discounted amount of $3,600 or less per library in a single funding year are exempt from posting FCC Form 470.
  - "**LLCC2**" exemption
  - Costs must be based on actual costs of equipment and services
  - Costs may not be averaged across multiple libraries

Form 471 Answers for LLCC2

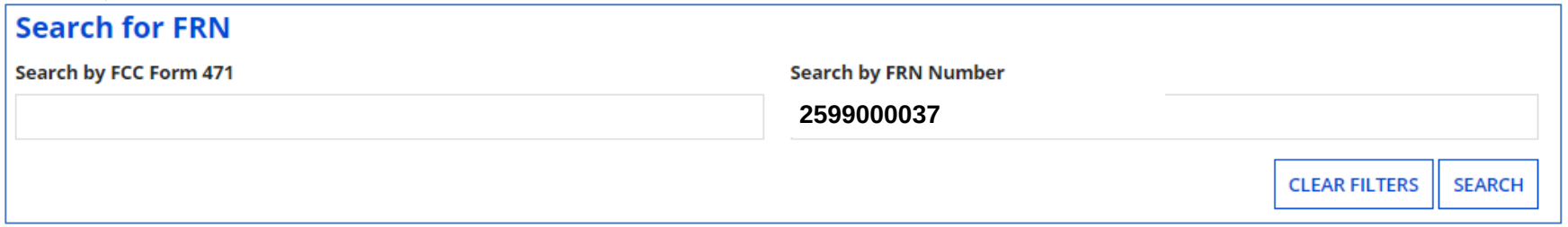


Typically the answer is No unless there is a multi-year agreement for C2 services. If you choose "yes," system will ask for last year's FRN



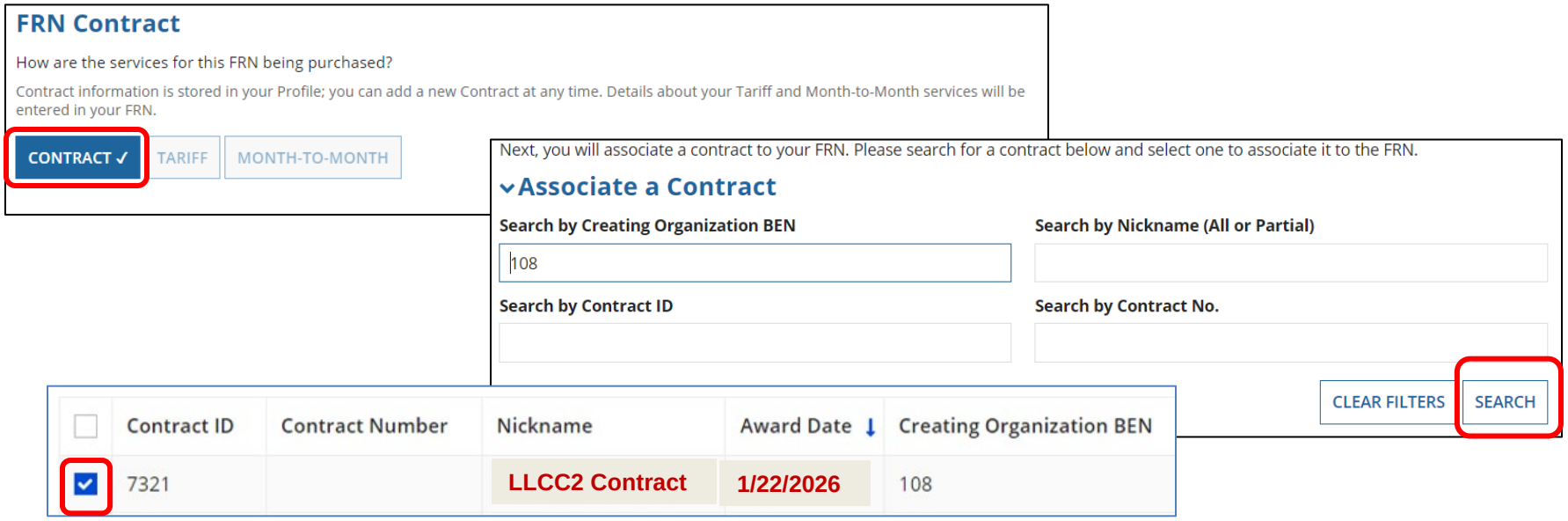


Typically won't be used for LLCC2 but if you do use it, system will require you to identify the FRN from previous year that you want to copy.

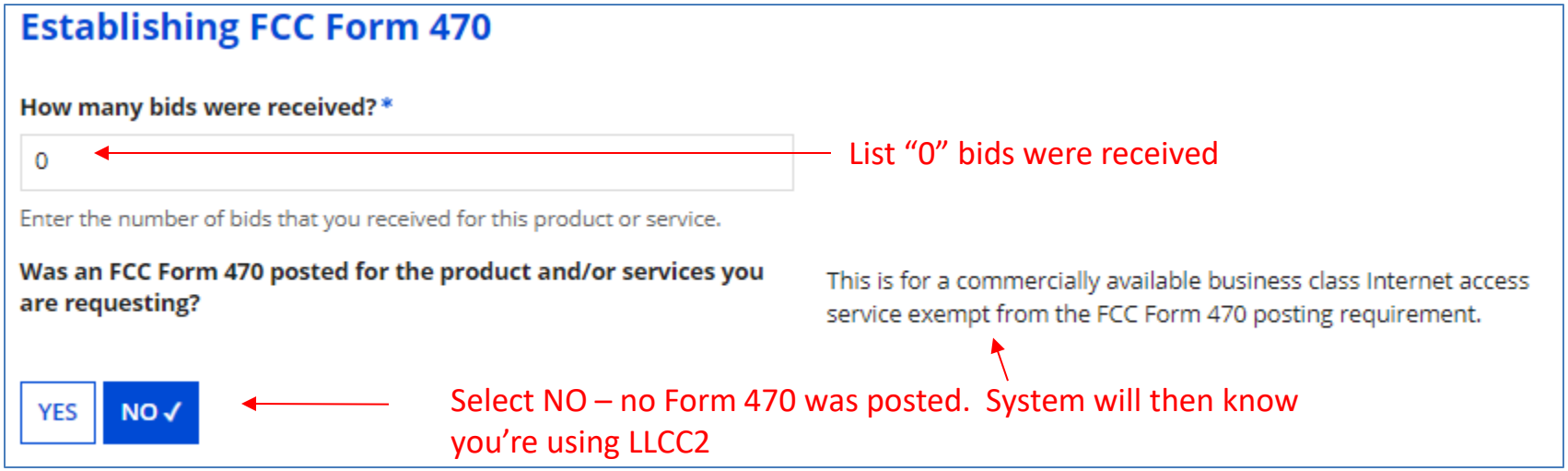


LLCC2 Contracted Services

- Contracted Services: Applicants are required to sign an agreement for all C2 purchases.
  - If a new contract is signed, the applicant should first create a Contract Record in EPC, then proceed to the Form 471 and follow these steps on the Form 471 to link the FRN to the Contract Record:



Form 471 Answers



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- Step 2: Competitive Bidding
  - FCC Form 470 Filing
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  - Open & Fair Process
  - Free Services Advisory
  - Consultant Registration Numbers
  - 28-Day Waiting Period
  - Requirements for Leased Dark Fiber & Self-Provisioned Networks
  - Gift Rules
  - **Competitive Bidding Exemptions**
- Step 3: Select Service Providers
- Step 4: Apply for Discounts
- Step 5: Application Review
- Step 6: Start Services
- Step 7: Invoice USAC
- Before You're Done

Competitive Bidding Exemptions

Category 1 – Low Cost, High-Speed Internet Access

Commercially Available Business class Internet Option (CABIO) Category 1 (C1) equipment and services are exempt from filing the FCC Form 470 if they meet all of the following requirements:

- Commercially available: This means that it is publicly available to non-residential customers (such as enterprise, small business, or other government customers) in the same form and at the same rates that it is offered to schools or libraries. Therefore, it may not be purchased through a master contract signed for just certain customers, even if the contract includes schools and libraries.
- Low cost: This means that the total annual pre-discount cost for the service, including any one-time costs such as installation, does not exceed $3,600 per year per school or library.
- High-speed: This means that the service must provide bandwidth speeds of at least 100 Mbps downstream and 10 Mbps upstream and provide basic conduit access to the Internet at those required minimum speeds.

An applicant utilizing the CABIO exemption should:

- Create your contract record (How to Create a Contract Record "CABIO")
- File your FCC Form 471 funding application to request E-Rate support

Category 2 – Low Cost, Category Two (Libraries only, effective Funding Year 2024 and later)

- Beginning in FY2024, library applicants seeking E-Rate support for Category 2 equipment and services that total a pre-discounted amount of $3,600 or less per library in a single funding year are exempt from filing the FCC Form 470. These costs must be based on the actual cost of the equipment and services requested and cannot be averaged across a number of libraries.
- An applicant utilizing this exemption should create a contract record. (How to Create a Contract Record)

Source: https://www.usac.org/e-rate/applicant-process/competitive-bidding/competitive-bidding-exemptions/ · page last modified Sep 26, 2025 · captured Nov 1, 2026

FAQs
Learn
Videos
Webinars
E-Rate News Brief
In-Person E-Rate Training Events
EPC Training Site
FAQs
All Topics
Basic Maintenance of Internal Connections (BMIC)
Calculating Discount Rates
Competitive Bidding & FCC Form 470
Consortia
Eligible Fiber Services
Eligible Services
Library
Low Cost High Speed Internet Access
Non-Instructional Facilities (NIFS)
Tribal Applicants

FAQs

Low Cost High Speed Internet Access

Q1: Do I always have to post an FCC Form 470 and conduct a competitive bidding process to receive E-Rate program funding for Internet Access (C1 only)?

A1:

Your Internet Access may qualify for an exemption from the FCC Form 470 posting requirement if it meets all of the following conditions:

1. It is commercially available. This means that it is publicly available to non-residential customers (such as enterprise, small business, or other government customers) in the same form and at the same rates that it is offered to schools or libraries. Therefore, it may not be purchased through a master contract signed for just certain customers, even if the contract includes schools and libraries.
2. It is low cost. This means that the total annual pre-discount cost for the service, including any one time costs such as installation, does not exceed $3,600 per year per school or library.
3. It is high speed. This means that the service must provide bandwidth speeds of at least 100 Mbps downstream and 10 Mbps upstream.
4. It provides access to the Internet at those minimum speeds. This means that the service type on your application must be “Internet Access” and you receive basic conduit access to the Internet at the required minimum speeds.

Q2: If I am exempt from filing FCC Form 470, how do I start the application process?

A2:

An applicant who is exempt from filing an FCC Form 470 should take the following steps

- Create your contract record (see video “Creating a Contract Record for CABIO Services”)
- File your FCC Form 471 funding application to request E-Rate support

Q3: Must the Internet Access meet all the criteria to qualify for funding?

A3:
Yes, you must be able to meet all of the criteria listed above to be exempt from the FCC Form 470 posting and other competitive bidding requirements.

Q4: I don't have a service provider that can offer those bandwidth speeds. Can I still use this exemption?

A4:
No. If the available commercial offerings do not meet all four criteria listed above, including the bandwidth requirements, you must post an FCC Form 470 and comply with all of the program's competitive bidding requirements before receiving E-Rate program support for your Internet Access.

Q5: Can I use this exemption to get support for a telecommunications broadband circuit?

A5:
No, this exemption requires that the service provides access to the Internet, and is not available for all broadband connections. Funding requests citing this exemption must be in the "Internet Access" service category.

Q6: What types of Internet connections can this be used for? For example, must the connection be provided over fiber or over cable?

A6:
Although this exemption allows for connections over a variety of technologies, remember that not all Internet connections are provided at the minimum broadband speeds.

Q7: I have three libraries that need Internet Access. Company A advertised in the local paper that it provides Internet Access at 100 Mbps downstream and 20 Mbps upstream for a cost of $250 per month per location with no installation charge. Would this offering be eligible for the exemption?

A7:
Yes, it would be eligible for this exemption because it is available to the public, meets the minimum broadband speeds, and the cost per library outlet is $250 * 12 months = $3,000 per year, which is below the $3,600 annual cap.

Q8: I have two schools that are interested in this exemption. The Internet Access cost for one school is $3,000 per year, but the cost for the second school is $4,000 per year. Can I average the cost for the two schools to fall below the $3,600 per entity annual limit?

A8:
No, the pre-discount annual total cost for the service at each location must fall at or below the $3,600 limit. Assuming that it meets all of the other criteria, you could use this exemption to purchase the Internet Access services for the first school at $3,000 per year, but you would have to post an FCC Form 470 and conduct a competitive bidding process for the second school since it exceeds the cost limit.

Q9: I'd like to use this exemption to purchase Internet Access for my administrative office, which is a non-instructional facility. Is that allowed?

A9:
Yes, you may use this exemption for Internet Access service delivered at non-instructional facilities, such as an administrative office.

Q10: I am already receiving Internet Access for my LAN/WLAN but it is not sufficient to meet all of my needs. Can I use this exemption as a way to supplement my existing Internet Access at a particular school or library?

A10:
No. If you request Internet Access under this exemption, you cannot receive other Internet Access service for the same location as well.

Source: https://www.usac.org/e-rate/learn/faqs/low-cost-high-speed-internet-access/ · all answers shown expanded · captured Nov 1, 2026

Applicant Process

Before You Begin

Step 1: Create an EPC Account

Step 2: Competitive Bidding

FCC Form 470 Filing

Letter of Agency (LOA)

Ministerial & Clerical Errors

Open & Fair Process

Free Services Advisory

Consultant Registration Numbers

28-Day Waiting Period

Requirements for Leased Dark Fiber & Self-Provisioned Networks

Gift Rules

Competitive Bidding Exemptions

Step 3: Select Service Providers

Step 4: Apply for Discounts

Step 5: Application Review

Step 6: Start Services

Step 7: Invoice USAC

Before You're Done

‹ Before You Begin Step 2 ›

Letter of Agency (LOA)

A Letter of Agency (LOA) establishes that applicant entities have authorized the person identified in the letter to act on their behalf. An LOA is evidence that establishes the relationship between the authorized person executing any program forms, and the entities featured on those forms.

The person certifying the FCC Form 471 affirms that he or she is the person authorized to submit and certify to the accuracy of the application.

This person must be authorized to represent any and all of the entities for which discounts are sought in the funding requests featured on the application. During its review of the FCC Form 471, USAC may require copies of the documentation that confirms this person's authorization to represent all of the entities featured on the FCC Form 471.

Consortium Letters of Agency

A consortium LOA is most commonly signed by consortium members and kept on file by their consortium leader to verify their knowledge of their membership and participation in the consortium. Consortium members and agents can also use a project agreement, a contract, a letter agreement, or other similar document to establish this authorization.

The consortium LOA must be signed and dated on or before the date the FCC Form 471 was certified.

The document establishing the above authorization must contain all of the following:

- The name of the person filing the application (the consortium leader)
- The name of the person authorizing the filing of the application (the entity who will receive discounted services, such as a consortium member)
- The specific timeframe the LOA or authorizing document covers (for example, Funding Year (FY) 2018)
- The signature, signature date, and title of an official who is an employee of the entity who is authorizing the filing of the application (the entity who will receive discounted services, such as a consortium member); and
- A description of type of services covered by the LOA or authorizing document (the description of services can be as general as "all Schools and Libraries (E-Rate) program eligible services" or it can be more restrictive).

The timeframes of these authorizations cannot be open-ended, such as “until terminated by either party.”

In certain situations, other documentation may be accepted as proof of authorization. For example, for consortium applications, the consortium lead member must either collect LOAs from each consortium member or be able to provide some other proof that each consortium member knew it was represented on the application.

Consortia which have a statutory or regulatory basis and mandatory participation by schools or libraries must be able to provide documentation supporting this certification, including copies of the relevant state statute or regulation.

Refer to this sample Letter of Agency for further guidance.

Source: https://www.usac.org/e-rate/applicant-process/competitive-bidding/letter-of-agency-loa/ · page last modified Sep 3, 2026 · captured Nov 1, 2026

Applicant Process

Before You Begin
Step 1: Create an EPC Account
Step 2: Competitive Bidding
FCC Form 470 Filing
Letter of Agency (LOA)
Ministerial & Clerical Errors
Open & Fair Process
Free Services Advisory
Consultant Registration Numbers
28-Day Waiting Period
Requirements for Leased Dark Fiber & Self-Provisioned Networks
Gift Rules
Competitive Bidding Exemptions
Step 3: Select Service Providers
Step 4: Apply for Discounts
Step 5: Application Review
Step 6: Start Services
Step 7: Invoice USAC
Before You're Done

‹ Before You Begin Step 2 ›

Consultant Registration Numbers

A consultant is defined as any non-employee of the entity applying for funding that assists in filling out the application materials for a fee. Consulting firms, for purposes of being identified in the E-Rate Productivity Center (EPC), may be organizations with one or more employees or they may be individuals.

A consulting firm must obtain a Consultant Registration Number (CRN), a unique eight-digit identification number assigned by USAC. Employees of a consulting firm do not obtain individual CRNs; instead, they use the CRN of the consulting firm that employs them.

Applicants that use the consultant's services must identify the consultant by entering the consulting firm's CRN in the applicant's EPC account profile, and adding individual consultants within the consulting firm as existing users.

How to Obtain a Consultant Registration Number (CRN)

To request a CRN or to change information linked to an existing CRN, a consultant should call the Customer Service Center (CSC) at (888) 203-8100 and be prepared to provide the following consultant information:

- Consulting firm name
- Consulting firm street address, city, state, and zip code
- Consulting firm telephone number
- Consulting firm email address

Provide the following information for the person who should be assigned as the consultant firm's account administrator in EPC:

- Account administrator's name
- Account administrator's job title
- Account administrator's address
- Account administrator's telephone number
- Account administrator's email address

If the firm already has a CRN on file and if there are no changes to any of the contact information, USAC will provide the CRN over the phone.

If there is no CRN on file, USAC will create a new record. If there are changes required to an existing record, please call CSC at (888) 203-8100 or open a customer service case in EPC.

How to Add a Consultant to Your EPC Account

1. Link the consulting firm to your organization through the **Manage Organization Relationships** link.
2. Add the individual consultant (the employee of the consulting firm who is working with you) to your organization as a user through the **Add or Remove Users** link.
3. Assign user rights to the individual consultant using the **Manage User Permissions** link.

Permission Levels for Consultants

When you assign user rights to your consultant, you can choose from three permission levels:

- **Full rights**: They can complete and certify forms on your behalf, update profile information, and receive all communications regarding this BEN from USAC on the E-Rate program.
- **Partial rights**: They can complete (but not certify) forms, and update profile information.
- **View-only rights**: They can review (but not update) forms and profile information.

Consultants Cannot Be an Applicant's Account Administrator

It is especially important that the school/library does not make their consultant the "account administrator." For security purposes, the account administrator must be an employee of the school or library.

Schools and libraries can only link consultants with accounts in EPC to their organization. Do not create an account for the consultant through the school/library.

Instead, the consultant needs to create their account through their consulting organization (which has its own, separate EPC account), and then ask the school/library to link them to the school/library organization.

Source: https://www.usac.org/e-rate/applicant-process/competitive-bidding/consultant-registration-numbers/ · page last modified Apr 9, 2025 · captured Nov 1, 2026

Applicant Process

Before You Begin
Step 1: Create an EPC Account
Step 2: Competitive Bidding
FCC Form 470 Filing
Letter of Agency (LOA)
Ministerial & Clerical Errors
Open & Fair Process
Free Services Advisory
Consultant Registration Numbers
28-Day Waiting Period
Requirements for Leased Dark Fiber & Self-Provisioned Networks
Gift Rules
Competitive Bidding Exemptions
Step 3: Select Service Providers
Step 4: Apply for Discounts
Step 5: Application Review
Step 6: Start Services
Step 7: Invoice USAC
Before You're Done

‹ Before You Begin Step 2 ›

Open & Fair Process

Applicants must ensure an open and fair competitive bidding process.

In the FCC Form 470 (Description of Services Requested and Certification Form), the applicant describes the types of products and services desired. The competitive bidding process begins when the FCC Form 470 is certified in the E-Rate Productivity Center (EPC). The applicant must be ready to accept bids once the FCC Form 470 is certified. Service providers will review the applicant's FCC Form 470 through EPC and submit bids to provide the requested products and services. Applicants report the selected products and services on the FCC Form 471 (Description of Services Ordered and Certification Form).

Request for Proposals

A request for proposal (RFP) is not required in most circumstances, but providing one could help service providers better understand the services you seek bids on. An RFP describes the project undertaken and contains sufficient details to inform potential bidders of the scope, location, and any other requirements for the project.

If an RFP exists, the applicant must upload the document as part of the online FCC Form 470 filing process. If state or local procurement regulations impose additional requirements, such as eligibility requirements for bidders, these requirements must also be noted on FCC Form 470.

Conducting an Open and Fair Competitive Bidding Process

The goal of the competitive bidding process is to have as many bidders as possible respond to an FCC Form 470, RFP, or other solicitation method so that the applicant can receive better service and lower prices. The applicant must take an affirmative role in evaluating bids. Applicants may not delegate the evaluation role to anyone associated with a service provider.

When reviewing bids, the applicant must conduct a fair and open competitive procurement.

- **"Open"** means there are no secrets in the process – such as information shared with one bidder but not with others – and that all bidders know what is required of them.

- **"Fair"** means that all bidders are treated the same and that no bidder has advance knowledge of the project information.

The FCC Form 470, RFP, or other solicitation method should be clear about the type and quantity of products and services the applicant is seeking and must be based directly on the applicant's technology needs. In addition, the applicant must avoid using generic or encyclopedic service descriptions on their FCC Form 470, RFP, or other solicitation method. Generic or encyclopedic requests will inhibit service providers from composing a responsive bid without additional information or insight into the applicant's bid solicitation.

- Examples of a generic FCC Form 470 or service description include "all eligible services," "any Schools and Libraries (E-Rate) program products," or "all telecom services."
- Examples of an "encyclopedic" service description are replications of the entire Eligible Services List or a "grocery" list of services that does not cover a specific service or product.

In order to be sure that an open and fair competition is achieved, any marketing discussions held with service providers must be neutral, so as not to taint the competitive bidding process. For example, the applicant should not have a relationship with a service provider prior to the competitive bidding process that would unfairly influence the outcome of a competition or would furnish the service provider with "inside" information or allow it to unfairly compete in any way. Similarly, applicants must avoid conflicts of interest in the bidding process.

Similarly, applicants must avoid conflicts of interest in the bidding process. For example, a conflict of interest exists when the applicant's consultant is associated with a service provider that is selected and is involved in determining the services sought by the applicant and the selection of the applicant's service provider(s).

Source: https://www.usac.org/e-rate/applicant-process/competitive-bidding/open-fair-process/ · page last modified Sep 2, 2026 · captured Nov 1, 2026

Applicant Process

Before You Begin
Step 1: Create an EPC Account
Step 2: Competitive Bidding
FCC Form 470 Filing
Letter of Agency (LOA)
Ministerial & Clerical Errors
Open & Fair Process
Free Services Advisory
Consultant Registration Numbers
28-Day Waiting Period
Requirements for Leased Dark Fiber & Self-Provisioned Networks
Gift Rules
Competitive Bidding Exemptions
Step 3: Select Service Providers
Step 4: Apply for Discounts
Step 5: Application Review
Step 6: Start Services
Step 7: Invoice USAC
Before You're Done

‹ Before You Begin Step 2 ›

Free Services Advisory

Applicants and service providers are prohibited from using Schools and Libraries (E-Rate) program funds to subsidize the procurement of ineligible or unrequested products and services or from participating in arrangements that directly or indirectly reduce the applicant's non-discount share.

Basic Principles

Funding requests or applications inconsistent with the following principles are contrary to program rules and will be denied.

- **Account for Promotional or Fringe Benefit Value**: The value of all price reductions, promotional offers, and "free" products or services must be deducted from the pre-discount cost of services indicated in funding requests.
- **No Cost-Shifting**: Costs, trade-in allowances, and discounts must be fairly and appropriately derived. For example, the cost for eligible components may not be inflated in order to compensate for discounts of other components not included in funding requests.
  - Applicants may not trade in equipment purchased with program funds sooner than five years after the date that the equipment was installed.
  - Once five years have elapsed, applicants may trade in equipment and may use money received from the trade-in to "pay" the applicant's non-discount share on other eligible equipment.
- **Eligible/Ineligible Cost Allocation**: A proportionate cost allocation is required between eligible and ineligible components.
  - The FCC Form 471 funding request(s) and the applicant's inventory or asset register must identify the ineligible components including product name, model number, and location.

In addition, applicants and service providers are cautioned that willful violations of program rules can result in criminal penalties.

Examples

Example 1: Applicant receives a discount for services received.

Assume that a service provider's regular price for a service is $100, but that it will offer the applicant a 20 percent price reduction. The funding request for this service must specify $80 as the pre-discount cost, and the applicant must pay its

share of this $80 cost. It is a violation of program rules to submit a funding request in excess of the actual cost expected to be charged and paid.

Example 2: A discounted or free service is provided in exchange for applicant purchase of an eligible service.

Assume that a service provider offers to provide an eligible service for $200, and also offers a 60 percent discount on a $300 ineligible service when both the eligible and ineligible service are purchased together. (The 60 percent discount means that the applicant would need to pay only 40 percent of the usual $300 cost.)

Because such an arrangement may have the effect of using program support to subsidize ineligible services, any discounts (or free services) must be allocated proportionately. For this example, the pre-discount cost of the eligible service should be shown as $128, as illustrated in the following calculations:

	Eligible Service	Ineligible Service	Total
Usual cost for both services	$200	$300	$500
Quoted cost for both services	$200	$120 ($300 usual cost reduced by 40% discount)	$320
Percent of usual cost to be paid	64% ($320 / $500)		
Proportional cost of eligible service	$128 (64% of $200)		

Example 3: A request for proposal (RFP) specifies both eligible and ineligible services and seeks only a single price for the mixed-eligibility bundle.

Assume that an applicant issues an RFP that seeks internet access (eligible), high speed broadband (eligible), and web-hosting (ineligible). Responses received provide only a single cost for the bundled package.

A funding request that provides only a single cost for both eligible and ineligible components cannot be approved under program rules. Eligible and ineligible products and services must have separated costs, so that the ineligible components can be subtracted from funding requests.

A limited exception exists to the requirement for separated pricing. In some cases, an eligible product or service can include ineligible components on an ancillary basis, and the full package can be eligible for support if certain conditions are met.

For example, a service provider's standard internet access service also provides email as a standard component, and this offering is the most cost-effective solution without considering the ineligible features, then the full cost can be submitted as the pre-discount cost in a funding request. The distinction in this case is that the added feature is ancillary, it is not specifically requested by the

applicant, and it is a part of the standard internet access package from the service provider.

Example 4: A service provider offers a discount for prompt payment.

Assume that an arrangement between a service provider and an applicant is for a service with a cost of $1,000, but that the service provider offers a 10 percent discount if the applicant portion is paid within 30 days. The amount eligible for funding in this case is the net cost to the applicant for payment within 30 days, or $900. Applicants must choose the most cost-effective solution, and certify to USAC that funds are on hand to pay the applicant share.

Therefore, applicants are expected to take advantage of payment discounts, when offered, and must seek support only toward the actual costs (in this case, $900) expected to be paid.

Example 5: A service provider donates funds to a grant organization, earmarked for an applicant.

Assume that an applicant seeks an eligible technology upgrade that costs $100,000. The service provider donates $10,000 to a grant organization, with a stipulation that the money goes to the applicant. This is a violation of program rules.

Program rules do not restrict applicants from accepting grants from bona fide organizations, nor do they restrict service providers from attempting to help applicants obtain grants from such organizations, so long as the grants and organizations are completely independent of the service provider.

Additional Requirements and Restrictions

The examples provided here are representative. Similar arrangements that effectively subsidize procurements or provide greater discounts than the applicant is entitled to would also be violations of program rules.

Any party with a potential financial interest in the E-Rate program is subject to the guidance provided. For example, a subcontractor to a service provider may not engage in the prohibited activities described here.

Applicants are required to maintain records of the competitive bidding process, including all bids obtained and the factors used in evaluating the responses and the determination of the winning bidder. These records must be provided to USAC or auditors on request.

Source: https://www.usac.org/e-rate/applicant-process/competitive-bidding/free-services-advisory/ · page last modified Apr 9, 2025 · captured Nov 1, 2026

Applicant Process

Before You Begin
Step 1: Create an EPC Account
Step 2: Competitive Bidding
FCC Form 470 Filing
Letter of Agency (LOA)
Ministerial & Clerical Errors
Open & Fair Process
Free Services Advisory
Consultant Registration Numbers
28-Day Waiting Period
Requirements for Leased Dark Fiber & Self-Provisioned Networks
Gift Rules
Competitive Bidding Exemptions
Step 3: Select Service Providers
Step 4: Apply for Discounts
Step 5: Application Review
Step 6: Start Services
Step 7: Invoice USAC
Before You're Done

‹ Before You Begin Step 2 ›

Gift Rules

E-Rate program rules impose significant restrictions on applicants and consultants regarding the direct or indirect solicitation or acceptance of gifts from service providers or prospective service providers. Gifts are defined as gratuities, favors, entertainment, loans, or any other thing else of value to or between anyone associated with the applicant or service provider.

The purpose of these restrictions is to ensure a fair and open competitive bidding process that is free from any conflicts of interest. Any soliciting, offering, acceptance, or receipt of gifts between involved parties is considered a competitive bidding violation that could put your E-Rate funding at risk.

There are limited exceptions to the gift prohibition, which mirror federal government regulations. Exceptions to the gift rule include items worth $20 or less. Applicants may not accept gifts with a retail value greater than $20, which include but are not limited to gifts for attending seminars; marketing calls; loans of products, including those characterized as on-site product demonstrations; services or equipment; or trainings.[1] For example, meals and/or prizes at conferences are permitted if they are worth $20 or less.

The combined value of items received by any individual may not exceed $50 from any one source per funding year (period from July 1 to June 30). "One source" includes all employees, officers, representatives, agents, independent contractors, and directors of a service provider.

You should also be aware of the prohibition on the provision of free services. Applicants and service providers are prohibited from using E-Rate program funds to subsidize the procurement of ineligible or unrequested products and services or from participating in arrangements that directly or indirectly reduce the applicant's non-discount share of costs.

Service providers may provide charitable donations, as long as those contributions are not given to circumvent the competitive bidding rules, including requiring applicants to pay for their non-discount portion of eligible costs. For example, donations for literacy programs, scholarships, and capital improvements can be made as long as such contributions are not directly or indirectly related to E-Rate procurement activities or decisions.

Gifts from a service provider employee that are given to family or friends that work for a school or library must be purchased with the service provider employee's

personal funds (without reimbursement from the employer) and cannot be related to a business transaction or business relationship.

In addition, schools, libraries, and service providers remain subject to applicable state and local restrictions regarding gifts. To the extent that a state or local provision is more stringent than the FCC gift rule requirements, violation of the state or local restriction constitutes a violation of the FCC rule.

If applicants suspect a violation, they must promptly return the item, dispose of it, or pay the donor its market value. Applicants should keep a record of this return, disposal, or payment on file in case of future questions.

Restrictions on gifts apply all year, not just during the competitive bidding process.

View the Gift Rules video in the E-Rate Videos page.

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[1] While the FCC waived certain of the provisions relating to the provision of free products and/or services during the pandemic, those rules expired June 30, 2022. *See Petition for Waiver of Comcast Corporation for Lift Zone Initiative*, CC Docket No. 02-6, Order, 36 FCC Rcd 14349 (WCB 2021).

Source: https://www.usac.org/e-rate/applicant-process/competitive-bidding/gift-rules/ · page last modified Apr 9, 2025 · captured Nov 1, 2026

Service Provider Process

Step 1: Obtain a 498 ID/SPIN

Step 2: Respond to Applicant Bid Requests

Lowest Corresponding Price

Step 3: Sign Service Agreement With Applicant and Certify Compliance

Request Confidentiality

Service Provider Electronic Notifications

File the FCC Form 473

Step 4: Start Services

Step 5: Invoice USAC

Electronic Invoicing

How to File the FCC Form 474 in EPC

Post-Filing Corrections and Other Considerations

‹ Step 1 Step 3 ›

Lowest Corresponding Price

Lowest corresponding price (LCP) is defined as the lowest price that a service provider charges to nonresidential customers who are similarly situated to a particular applicant (school, library, or consortium) for similar services. See 47 C.F.R. § 54.500.

A similarly situated applicant is one that is located in the service provider's geographic service area (i.e., the area in which the service provider is seeking to serve customers with any of its E-Rate program services). See First Report and Order, 12 FCC Rcd 8776, 9032, para. 486.

Similar services include those provided under contract, as well as those provided under tariff. First Report and Order, 12 FCC Rcd 8776, 9032, para. 485. See also Fourth Order on Reconsideration, 13 FCC Rcd 5318, 5398, para. 133.

Service providers cannot charge applicants a price above the LCP for E-Rate program services. See 47 C.F.R. § 54.511(b).

This ensures that:

- Service providers do not charge applicants more than they would charge their other customers for the same services. See First Report and Order, 12 FCC Rcd 8776, 9031-32, para. 484; and
- Any lack of experience in negotiating in a service market does not prevent applicants from receiving competitive prices. See First Report and Order, 12 FCC Rcd 8776, 9031, para. 484.

A service provider – regardless of the size of the company or the category of service provided – must ensure that the LCP is provided to applicants. The applicant is not obligated to ask for it but must receive it. See 1996 Universal Service Order, 12 FCC Rcd 87, 383, para. 540.

Service providers cannot avoid the obligation to offer the LCP by arguing that none of their non-residential customers are identically situated to an applicant or that none of their service contracts cover services identical to those sought by an applicant. See First Report and Order, 12 FCC Rcd 8776, 9033, para. 488.

The service provider's obligation to provide the LCP is not tied to a response to an FCC Form 470 or request for proposal (RFP). The service provider must

actually charge a rate that is the LCP, not just offer the LCP in a bid response. See 47 C.F.R. §§ 54.511(b), 54.500.

If a service provider does not know that a customer participates in the E-Rate program and therefore does not charge the LCP rate, the service provider must actually charge the LCP once it realizes that the customer participates in the program. See 47 C.F.R. §§ 54.511(b), 54.500.

An applicant may request lower rates if the rate offered by the service provider does not represent the LCP. See 47 C.F.R. § 54.504(c)(1).

Service providers may request higher rates from the FCC if they can show that the lowest corresponding price is not compensatory. See 47 C.F.R. § 54.504(c)(2). This can occur when the service provider can show that it faces demonstrably and significantly higher costs to serve the applicant. Factors that could affect the cost of service include, but are not limited to, volume, mileage from facility, and length of contract. See First Report and Order, 12 FCC Rcd 8776, 9033, para. 488.

In addition, please note that:

- There is a rebuttable presumption that rates offered within the previous three years are still compensatory. See First Report and Order, 12 FCC Rcd 8776, 9034, para. 489 and Fourth Order on Reconsideration, 13 FCC Rcd 5318, 5398, para. 133.
- Promotional rates offered by a service provider for a period of more than 90 days must be included among the comparable rates upon which the LCP is determined. See 47 C.F.R. § 54.511(b).

Source: https://www.usac.org/e-rate/service-providers/step-2-responding-to-bids/lowest-corresponding-price/ · page last modified Jun 6, 2025 · captured Nov 1, 2026

Tariffed Services and Non-Contract Services

What are tariffed services?
Tariffed services are those data transmission services that have terms and conditions, including pricing, set forth in documents called tariffs that are on file with a state Public Utility Commission (PUC) and/or the Federal Communications Commission (FCC). Tariff service refers only to data transmission telecommunications services, and not Internet access service. Internet access service providers are not regulated by state PUCs and do not file tariffs.

What are non-contract services?
Some telecommunications companies that provide Category 1 data transmission services are not regulated by state public utility commissions and/or do not file tariffs. These companies may offer services on a month-to-month basis and may not require customers to sign a contract. Also, Internet access service providers may offer month-to-month non-contract services. Additionally, some state legislatures may have eliminated the requirement for telecommunications common carriers to file tariffs with the state PUC and these companies may simply provide non-contract services as well.

Under the E-Rate program, USAC does not recognize multi-year tariff arrangements. Multi-year tariff arrangements must be treated as contracts.

Only Category 1 services may be provided as a tariff or month-to-month, non-contractual arrangement.

All Category 2 services and/or equipment purchases must be purchased pursuant to a signed contract. Please refer to the separate document concerning contracts for more information.

How should tariff and non-contract services be handled on my Form 470?
Applicants seeking discounts for services purchased without a contract arrangement – either via a tariff or a price quote from a vendor -- must request bids for these services each year via the Form 470. This 470 posting must be done after USAC releases the upcoming funding year's version of the Form 470. Usually the Form 470 for the upcoming funding year becomes available sometime on or around July 1. Some applicants simply rely on July 1 as the earliest date for which they can post their Form 470 for the next year in the case of tariffed or month-to-month services. (For example: if you are seeking E-Rate discounts for the program year beginning July 1, 2021, you would normally submit the 470 on or after July 1, 2020).

How should I handle tariffed and non-contract services on my Form 471?
After your Form 470 has been posted on the USAC E-Rate Web Site for 28 days, you must evaluate all bids received and select the most cost-effective bidder. If your current service provider does not submit a bid, you may rely on a recent bill as a bid. If your current service provider offers the most cost effective service, you may continue using this vendor; otherwise, you are required to change vendors to receive service from the most cost effective bidder. Before selecting the most cost-effective vendor, you must consider all proposals received in response to your Form 470.