New Form 471 Walk-through for FY 2015



Presented by Debra M. Kriete, Esq. South Dakota State E-rate Coordinator January 21, 2015

E-rate 2.1: More Changes



- Second FCC E-rate Modernization issued on December 11, 2014
- Includes more NEW rules, clarifies others and opines on items from 2.0 Order that were submitted for reconsideration
- Some new rules are to begin in 2015, others in 2016

E-Rate 2.1: A LOT More \$\$

- \$1.5 billion additional funding each year
 - Funds are added to existing cap of \$2.4 Billion for a new annual cap of \$3.9 Billion for FY 2015
 - Will continue to be inflation adjusted in future years
- Additional funding from reserves of at least \$1 billion for each of the next 2 years
- FY 2015 and FY 2019: \$4.9 billion available
- Substantial likelihood that all requests for C1 and C2 funding at all discount levels may be funded

E-Rate 2.1

- Clarifies rules surrounding eligibility of wireless (cellular) data plans and air cards
 - Eligibility narrowed to very limited situations
 - Bookmobiles and very small school buildings
 - Must show installation of permanent wireless equipment is not cost effective or physically feasible
 - If you are going to apply, file this FRN on a completely separate application and be prepared to answer many PIA questions

E-Rate 2.1

- Revised, more sensible definition of Urban
 - Schools and libraries in "urbanized areas" and "urban clusters" in which the population is less than 25,000 will be considered rural for purposes of discount calculation
- Category 2 "Budget" approach of \$150 per student/building is effective for five years
 - Previously this was going to possibly sunset after 2 years
- One-time C1 construction charges may be applied for in a lump sum for next 4 years
 - Previously had to apply over 3 years if charges were \$500,000 or more

Reminders:

- Form 471 Window is <u>OPEN NOW</u>
- Form 471 Filing Window closes at 11:59 pm
 Eastern Time on Thursday March 26, 2015
- Last possible day to post Form 470 for 2015/2016 is <u>February 26, 2015</u>
- DO NOT miss these deadlines!
- Build in more time than past years!!

What's New in the Form 471?

- New updated interface
- May use different browsers: Firefox, Safari, Chrome, IE
- New questions new information must be provided
- Block 5 has two parts
 - Traditional FRN information
 - Item 21 attachment is embedded in form
- Updated and optional template for Block 4 discounts
- New optional templates for Item 21
- Cannot copy/paste Block 4 from last year's form

1 Entity # for Each School

- How is "school" defined for E-rate purposes?
 - Based on state law definition
 - If the LEA is a separate listing in the State Educational Directory, the LEA is a "school" for E-rate purposes and requires a separate entity #
- School ≠ physical building
- SLD wants to know what services and equipment are in each specific "school"
- May need to request additional entity number for each LEA
- See list of entity #s posted to list serve

Category 1 Voice Phone Service 471

- Key differences in this year's Form 471:
 - Voice service must be in a separate FRN
 - If you receive Internet and voice service from same vendor, create 2 separate FRNs, one for voice and one for Internet
 - Smartphone plans must be cost allocated
 - May apply for voice charges
 - Must deduct separate text message charges
 - Must deduct data related charges
 - Aircards are generally ineligible and need to be deducted from cellular bill

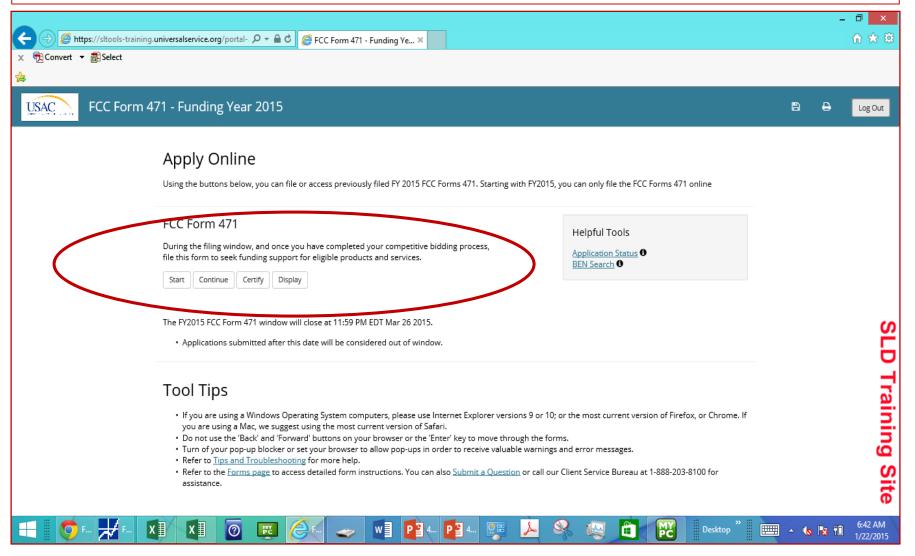
Cellular Cost Allocations

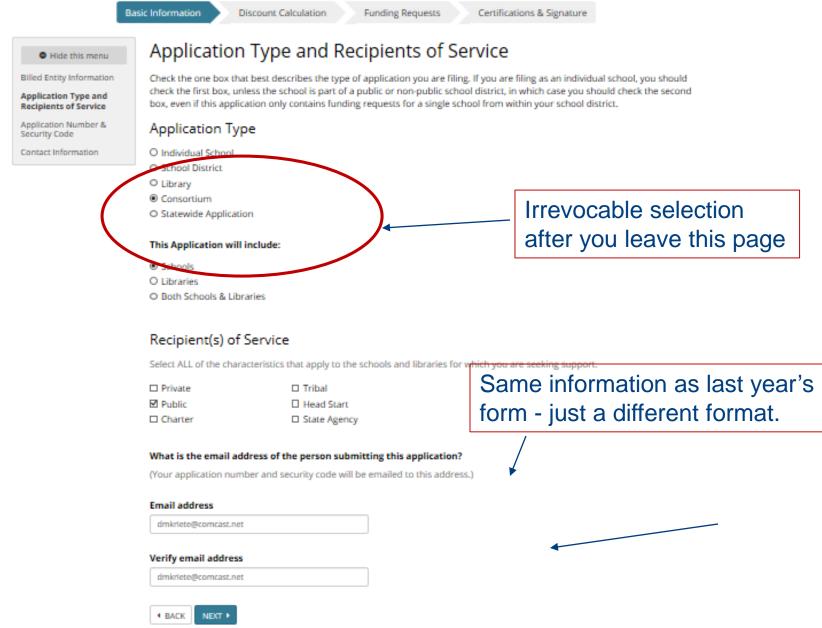
- Ask your specific cellular representative for their cost allocations for your specific Smartphone and cellular plans
- If you cannot obtain specific information:
 - Deduct separate itemized text message charge from voice plans (if a separate line item)
 - Deduct 50% of Smartphone charges to remove data charges

Other C1 Information

- # of phone lines
- Speed (mbps) for phone line
 - Use 1 mbps for POTS lines and cellular lines
- Speed (mbps) for DSL or cable modem lines
 - Review bill for this information
 - Check vendor's website if not on bill
 - Contact company to ask

The New Form 471 Interface





Applicant: SOUTH DAKOTA STATE DEPT OF ED

Basic Information

Discount Calculation

Funding Requests

Certifications & Signature



Billed Entity Information

Application Type and Recipients of Service

Application Number & Security Code

Contact Information

Application Number and Security Code

You will need this information in order to log back into the application.

Application Number: 996077

Security Code: 19831

System-assigned; write it down in safe place

This information has been emailed to dmkriete@comcast.net.

New this year

If you would like to give this application a nickname, enter it here

Form 471 Webinar Test South Dakota

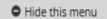
◆ BACK NEXT ▶

Basic Information

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Billed Entity Information

Application Type and Recipients of Service

Application Number & Security Code

Contact Information

Contact Information

Next, you will identify the individuals assisting in seeking E-rate support.

Is a consultant assisting you?

If a consultant has/is assisting you with your E-rate process, you must identify them. A consultant is any non-employee of the entity applying for funding that assists in filling out the application materials for a fee.

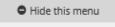


You decide -You or your Consultant???

Contact Person's Name		
Debra Kriete		
All questions regarding this application wil	I he sent to the email address that you provide h	elow
	ll be sent to the email address that you provide b	elow.
All questions regarding this application wil	ll be sent to the email address that you provide be	elow.

Is the contact person's address and telephone number the same as that of the Billed Entity?





Billed Entity Information

Application Type and Recipients of Service

Application Number & Security Code

Contact Information

Contact Information

Next, you will identify the individuals assisting in seeking E-rate support.

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Is the consultant acting as the contact person for this application?

Do NOT designate your consultant as the contact person for this application and selection appears a valid email address for them appears above.

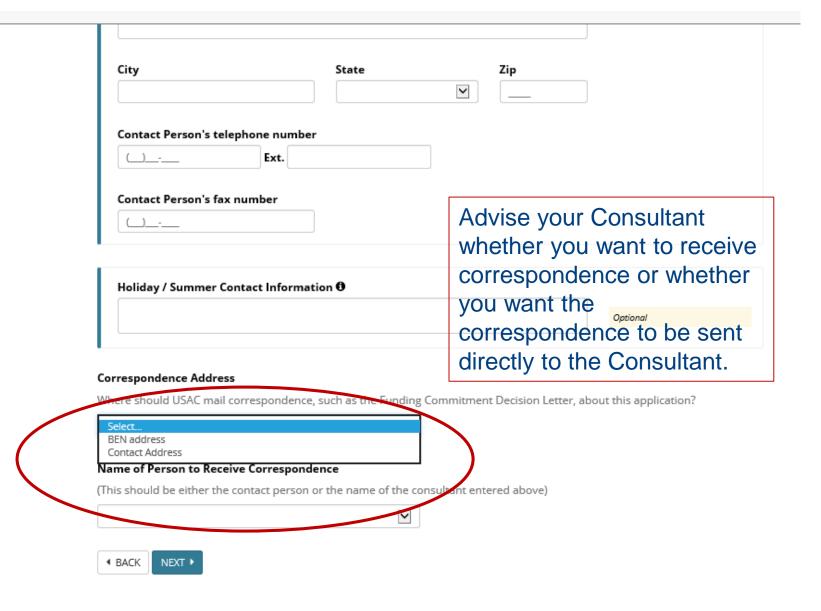


If you are using a consultant, you must have a Letter of Agency and your consultant MUST obtain a Consultant Registration # and report it

<u>A consultant = anyone who</u> is not an employee of your school who is completing your application.

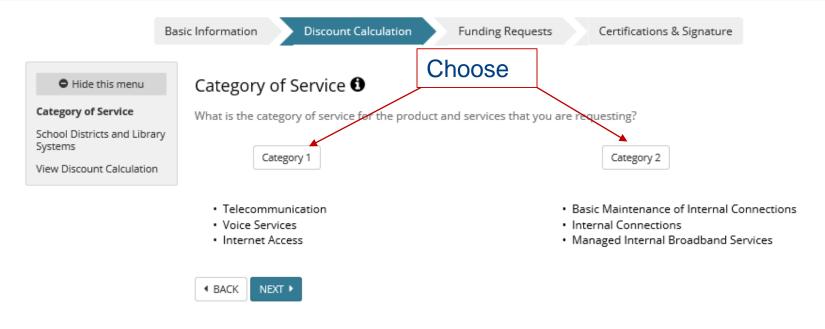
Is the contact person's address and telephone number the same as that of the Billed Entity?

City		State	Zip	_
Contact Person's t	elephone numbe	er		
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City	Sta	ate		Zip		
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Contact Person's fax n	ımber					
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Holiday / Summer Con	act Information 🗗					
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	The person of the			,		
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Debra Kriete						
Debra Kriete NEXT						

STATE DEPT OF ED - Form 471 Webinar Test South Dakota

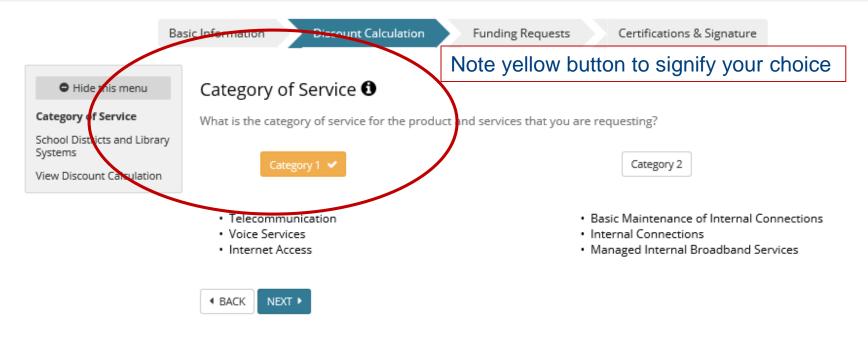




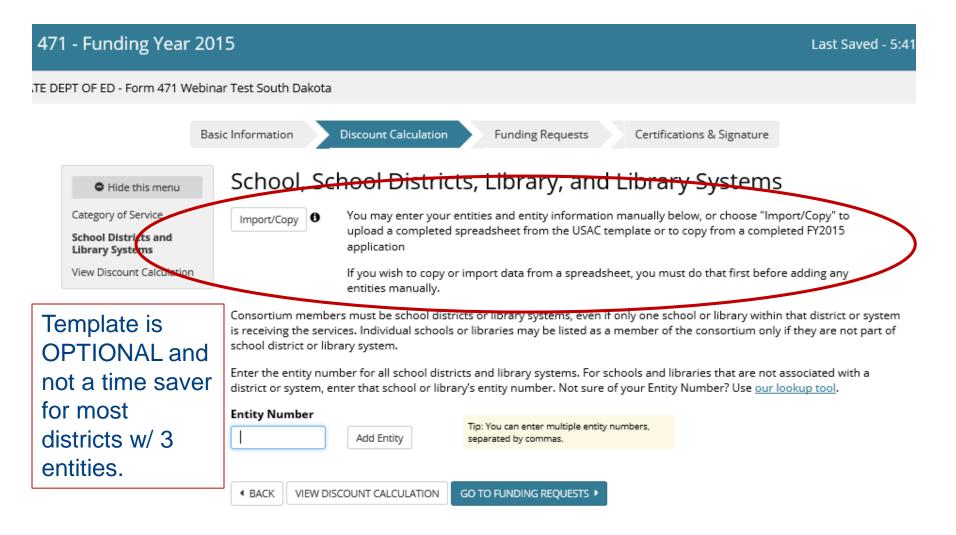
471 - Funding Year 2015

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This is the NEW Block 4 for providing discount information AND answering NEW connectivity-related questions.



71 - Funding Year 2015 Last Saved - 5:41 A

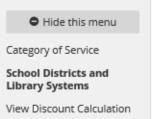
DEPT OF ED - Form 471 Webinar Test South Dakota

Basic Information

Discount Calculation

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School, School Districts, Library, and Library Systems

Import/Copy 0

You may enter your entities and entity information manually below, or choose "Import/Copy" to upload a completed spreadsheet from the USAC template or to copy from a completed FY2015 application

If you wish to copy or import data from a spreadsheet, you must do that first before adding any entities manually.

Consortium members must be school districts or library systems, even if only one school or library within that district or system is receiving the services. Individual schools or libraries may be listed as a member of the consortium only if they are not part of school district or library system.

Enter the entity number for all school districts and library systems. For schools and libraries that are not associated with a district or system, enter that school or library's entity number. Not sure of your Entity Number? Use our lookup tool.

District Entity # required here

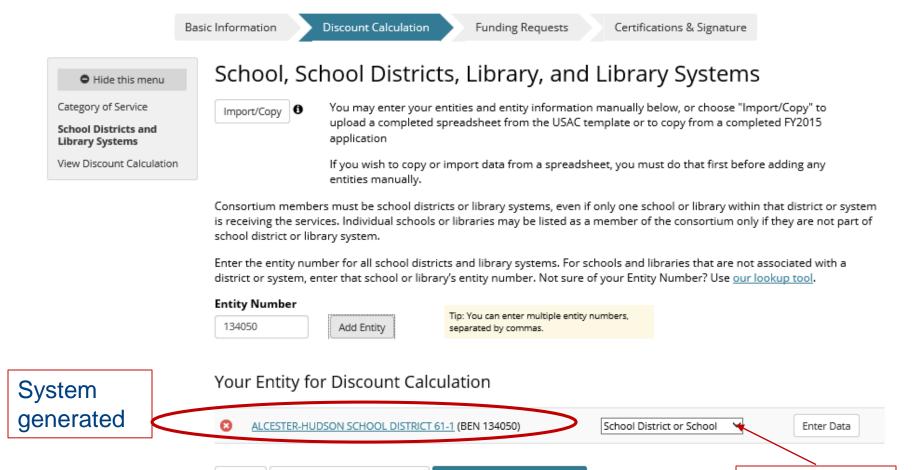


You choose

from drop

down box

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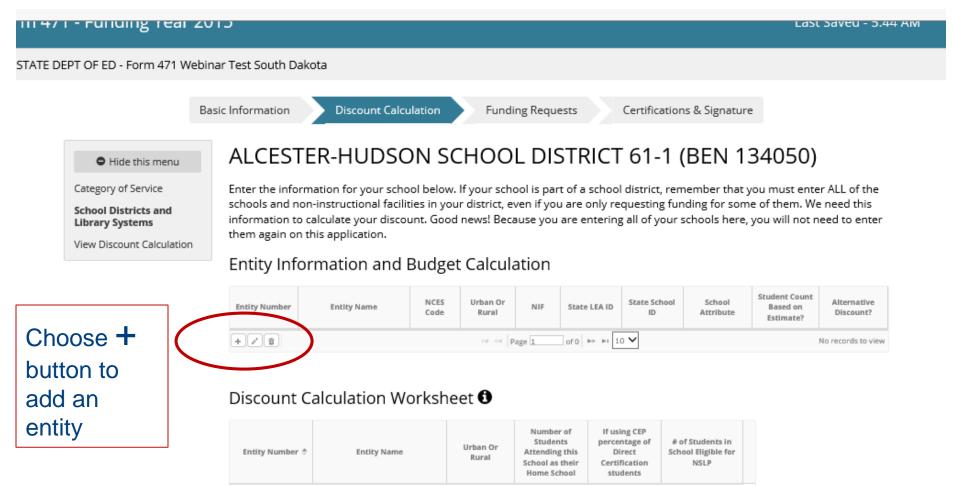


GO TO FUNDING REQUESTS >

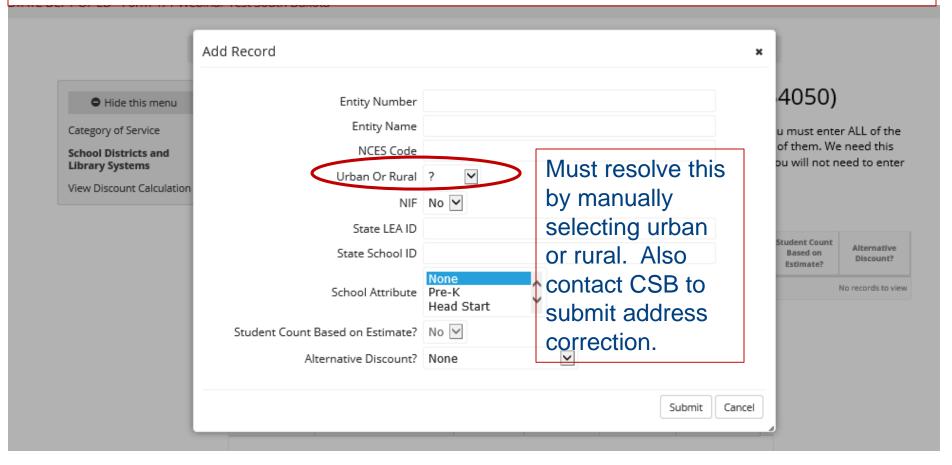
VIEW DISCOUNT CALCULATION

◆ BACK

This is the page where you enter each school's entity # and NSLP/enrollment numbers.



Same information as prior years – just a different format. Note for school attributes, you may select multiple attributes. Full list = Pre-K, Head Start, Adult Education, Juvenile Justice, ESA

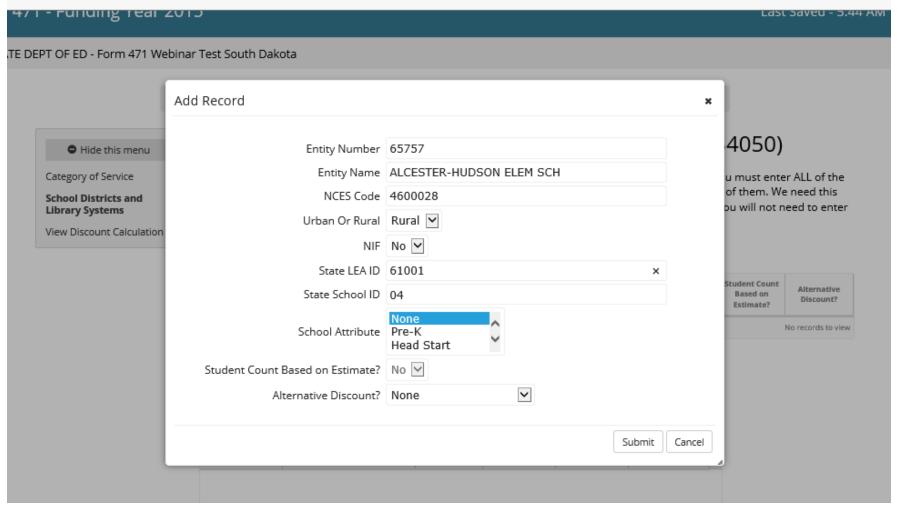


After entering Entity #, System will pre-populate Name and NCES Code.

If Name is incorrect, contact CSB to submit correction.

If NCES code is incorrect, write over the correct code.

NCES Code, State LEA ID and State School ID fields *are optional*.



New screen for entering # of students and # of NSLP students

Basic Information

Discount Calculation

Funding Requests

Certifications & Signature



Category of Service

School Districts and Library Systems

View Discount Calculation

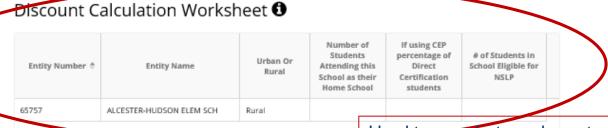
ALCESTER-HUDSON SCHOOL DISTRICT 61-1 (BEN 134050)

Enter the information for your school below. If your school is part of a school district, remember that you must enter ALL of the schools and non-instructional facilities in your district, even if you are only requesting funding for some of them. We need this information to calculate your discount. Good news! Because you are entering all of your schools here, you will not need to enter them again on this application.

Entity Information and Budget Calculation

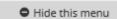
Shows info already data-entered

Entity Number	Entity Name	NCES Code	Urban Or Rural	NIF	State LEA ID	State School ID	School Attribute	Student Count Based on Estimate?	Alternative Discount?
65757	ALCESTER-HUDSON ELEM SCH	4600028	Rural	No	61001	04	None	No	None
+/1			141 -<41 P	age 1	of 0 >> >= 1	· •			View 1 - 1 of 1



Hard to see, but you have to hover over this field and click to be able to open it for data entry.

28



Category of Service

School Districts and Library Systems

View Discount Calculation

ALCESTER-HUDSON SCHOOL DISTRICT 61-1 (BEN 134050)

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Entity Information and Budget Calculation

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65757	ALCESTER-HUDSON ELEM SCH	4600028	Rural	No	61001	04	None	No	None
+/1	© View1-1 of 1								

Discount Calculation Worksheet 6

Entity Number 💠	Entity Name	Urban Or Rural	Number of Students Attending this School as their Home School	If using CEP percentage of Direct Certification students	# of Students in School Eligible for NSLP
65757	ALCESTER-HUDSON ELEM SCH	Rural			

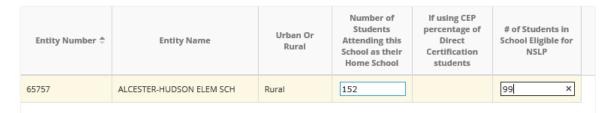
Category of Service
School Districts and
Library Systems
View Discount Calculation

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65757	ALCESTER-HUDSON ELEM SCH	4600028	Rural	No	61001	04	None	No	None
+ / 🛍							View 1 - 1		

Discount Calculation Worksheet 6



Notice the yellow color to indicate where to enter the data and what section you are working in. Also: you may first enter all of the Entity Information above and then enter the # of students and # of NSLP students for all buildings after that, OR you can complete both the Entity Info and Discount Calculation Worksheet by entity.

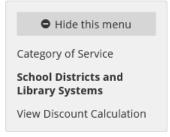
ant: SOUTH DAKOTA STATE DEPT OF ED - Form 471 Webinar Test South Dakota

Basic Information

Discount Calculation

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ALCESTER-HUDSON SCHOOL DISTRICT 61-1 (BEN 134050)

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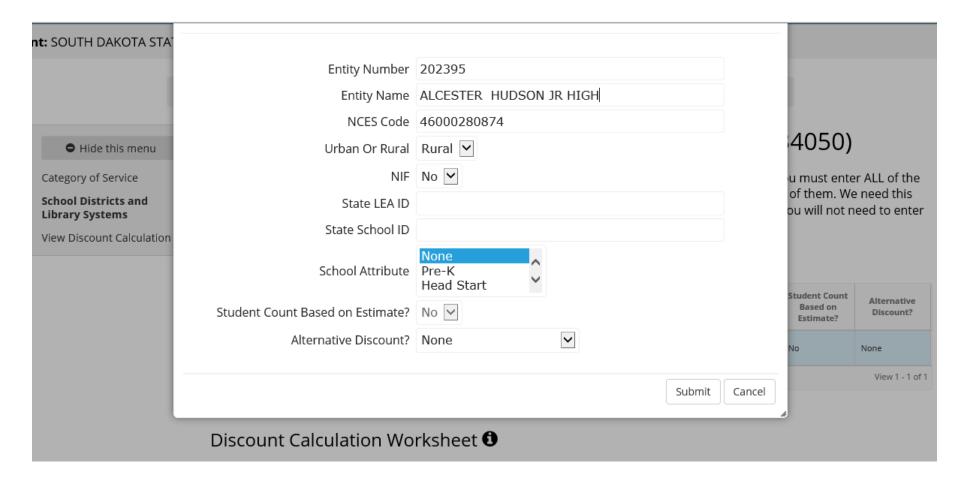
Entity Information and Budget Calculation



Discount Calculation Worksheet 1

Same steps required for each of the other two schools in the District.

Information for Alcester Hudson Jr. High



Entity Number \$	Entity Name	Urban Or Rural	Number of Students Attending this School as their Home School	If using CEP percentage of Direct Certification students	# of Students in School Eligible for NSLP
65757	ALCESTER-HUDSON ELEM SCH	Rural	152		99
202395	ALCESTER HUDSON JR HIGH	Rural	52		12
65756	ALCESTER-HUDSON HIGH SCHOOL	Rural	83		21

Delete worksheet

System automatically sums # of students and # of NSLP students per District to compute new simple average discount.

Calculate Discount Rate

Urban	Total Number of Students	Total Number of Students in	Percentage of Students in	Category 1
Rural	Enrolled in District	District Eligible for NSLP	District Eligible for NSLP	Discount Rate
Rural	287	132	46%	70%



Summary Discount Page for this District For Consortia applications, each District would be a separate worksheet.

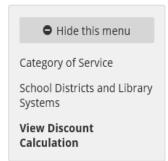
Applicant: SOUTH DAKOTA STATE DEPT OF ED - Form 471 Webinar Test South Dakota

Basic Information

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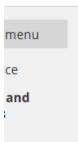
Consortium Discount

Based on the information that you provided, your consortium discount is set forth below.

Entity #	Name of Consortium Member	Category Discount Rate
134050	ALCESTER-HUDSON SCHOOL DISTRICT 61-1	70%
	Sum of Member Discounts	70
	Number of Members	1
	Category Consortium Discount	70%

Now that your discount calculations are complete, we are ready to move on to your funding requests. Click next to continue.

◆ BACK TO ENTITY LIST NEXT ▶



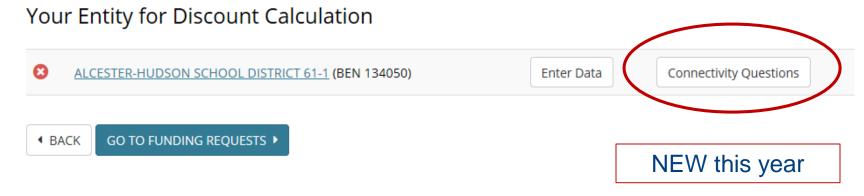
School, School Districts, Library, and Library Systems

Import/Copy 6

You may enter your entities and entity information manually below, or choose "Import/Copy" to upload a completed spreadsheet from the USAC template or to copy from a completed FY2015 application

If you wish to copy or import data from a spreadsheet, you must do that first before adding any entities manually.

Enter the entity number for all school districts and library systems. For schools and libraries that are not associated with a district or system, enter that school or library's entity number. Not sure of your Entity Number? Use our lookup tool.



ALCESTER-HUDSON SCHOOL DISTRICT 61-1 (BEN 134050)

Next, tell us about the current connectivity in your school district.

Connectivity Questions

Does the school district (or school, if not part of a district) have Internet access of

- Oless than 100 Mbps per 1,000 users (students and staff) < 0.1 mbps per student and staff
- O at least 100 Mbps per 1,000 users but less than 1Gbps per 1,000 users
- Oat least 1 Gbps per 1,000 users

0.1 mbps or > but < than 10 mbps per student and staff

10 mbps or more per student and staff.

How many of the schools in the school district have Wide Area Networking connections that are scalable to 10 Gbps?

0

Must provide a number in each of these below. 0 can be used.

How many schools in your school district have LAN/WLAN capacity and coverage?

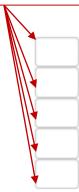
Completely sufficient to support the educational or library activities conducted here

Mostly sufficient to support the educational or library activities conducted here

Sometimes sufficient to support the educational or library activities conducted here

Rarely sufficient to support the educational or library activities conducted here

Not sufficient to support the educational or library activities conducted here



If you answer that less than all buildings have completely adequate LAN/WLAN coverage, these questions automatically appear on the form and you must select all that apply.

For those schools and libraries that do not have sufficient LAN/WLAN capacity and coverage to support the educational objectives or library activities conducted at that location, is the reason (check all that apply):

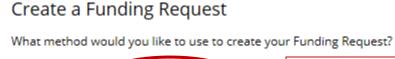
☐ Equipment too costly
☐ Installation too costly
☐ Broadband connection speed to building is too slow
☐ Inadequate local area network (LAN) services/internal networks and wiring
□ Outdated equipment
☐ Lack of training and technical support
☐ Inconsistent service/frequent outages and down time
☐ Physical structure or layout of building(s)
☐ Other: If so, please provide it here



Main Page for New FRN Section – Old Block 5



Funding Requests





Finished Entering Funding Requests?

If you've entered all of your data, you may go to the next step.

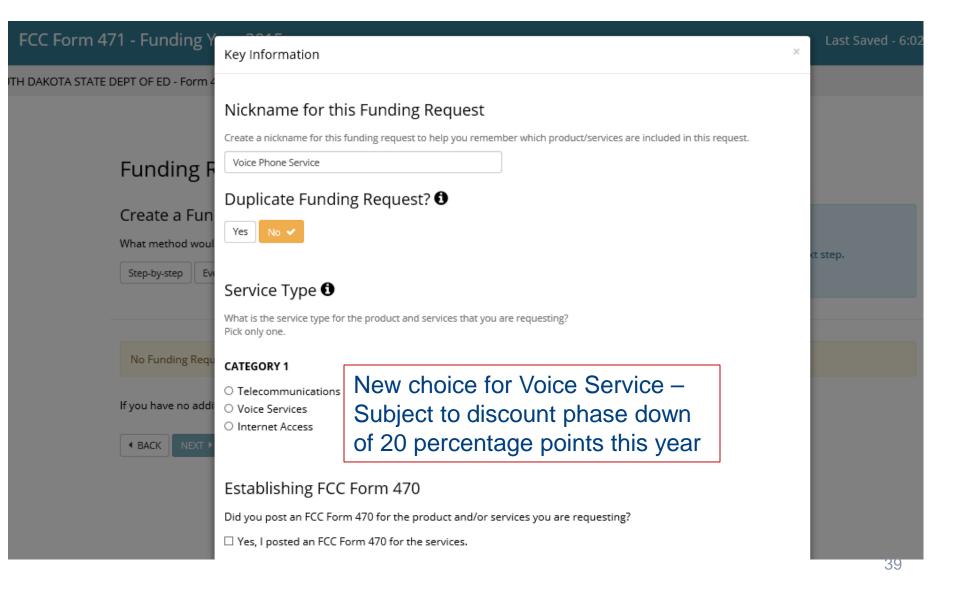
Certify & Submit Your Application

No Funding Requests have been created yet. Please use one of the buttons above to create a Funding Request.

If you have no additional Funding Requests to create, proceed to the "Certifications and Signature" section.



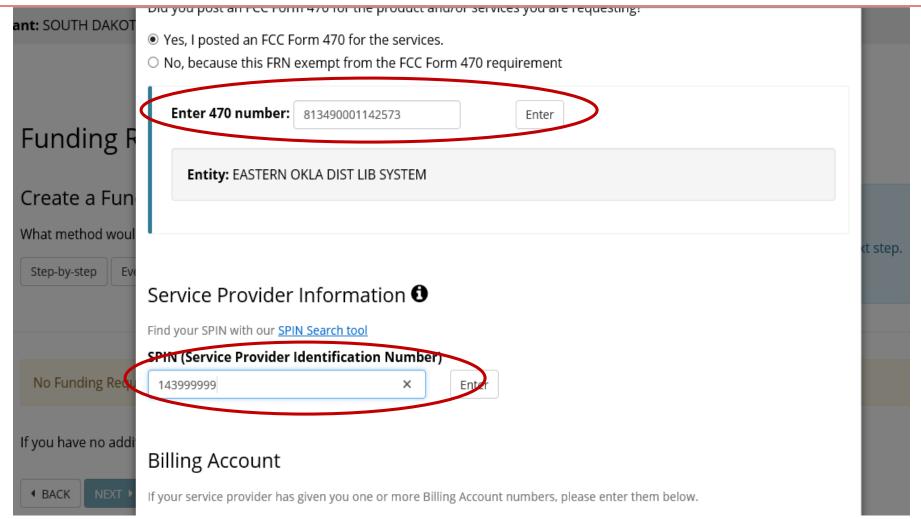
Create a Name for the FRN, Select the Category Type

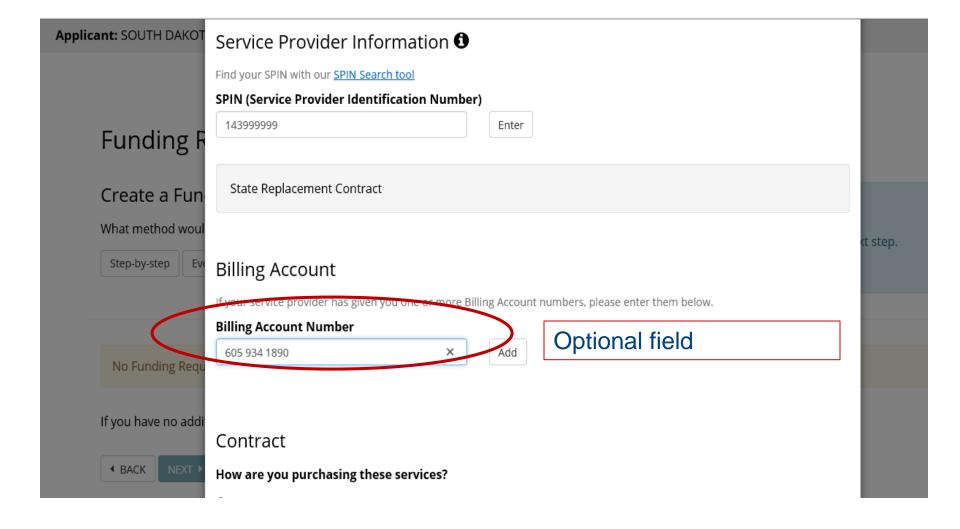


Enter your 14 Digit Form 470

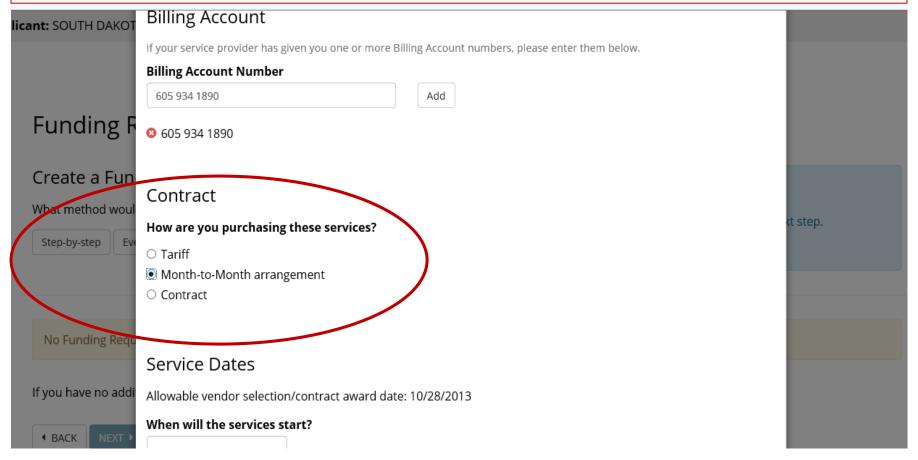
Make sure you enter this information on or after the 28 day from the 470 posting date (Allowable Contract Date)

Enter 9 digit SPIN for Service Provider

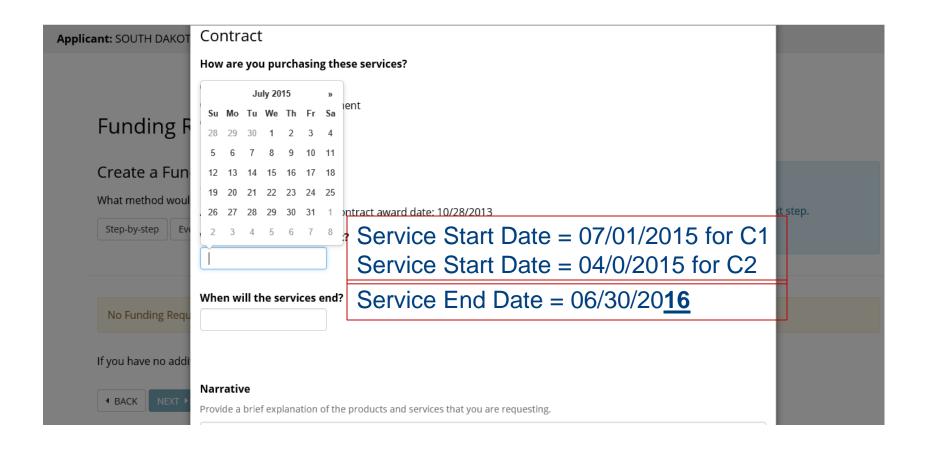




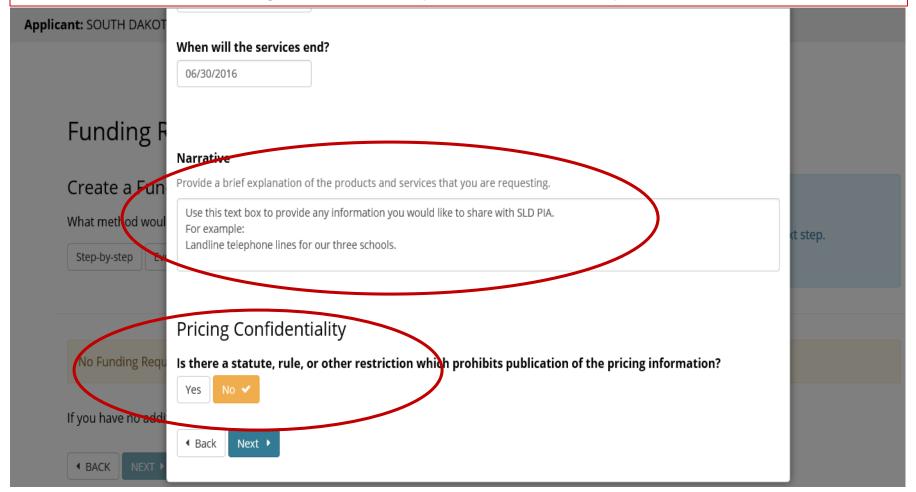
Must indicate whether service is MTM (non-contract), Tariff or Contract. If you don't have a contract, select "MTM" Note: all Category 2 funding requests MUST have a signed contract.



Pop-up Calendar for Service Start Date and Service End Dates

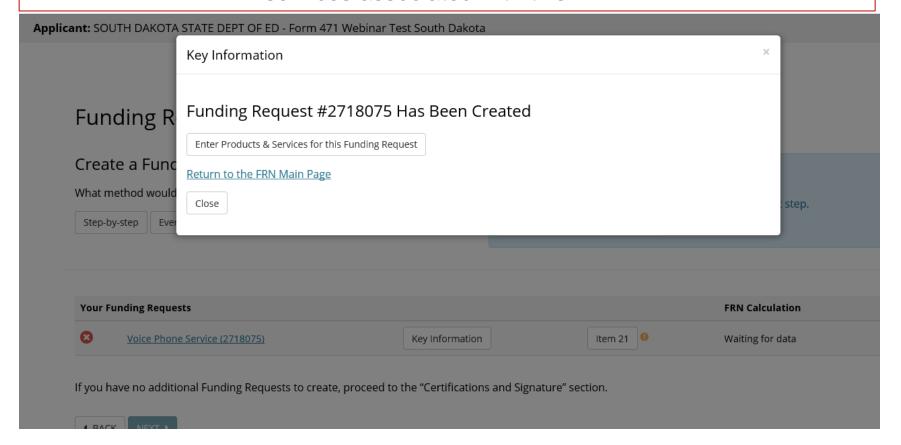


Narrative Box is an optional text box Provide a description of your services here Pricing Confidentiality box should always be NO

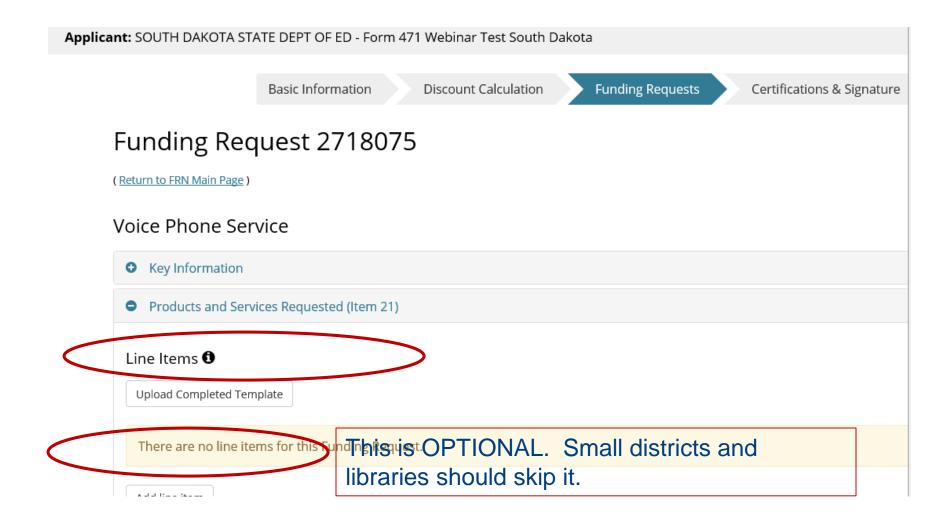


You have created your FRN but you're not done!

Now it's time to enter the Item 21 related information to itemize the specific services associated with this FRN.



Item 21 Page also called "Products and Services Requested"



Select "Add line item" to begin this section.

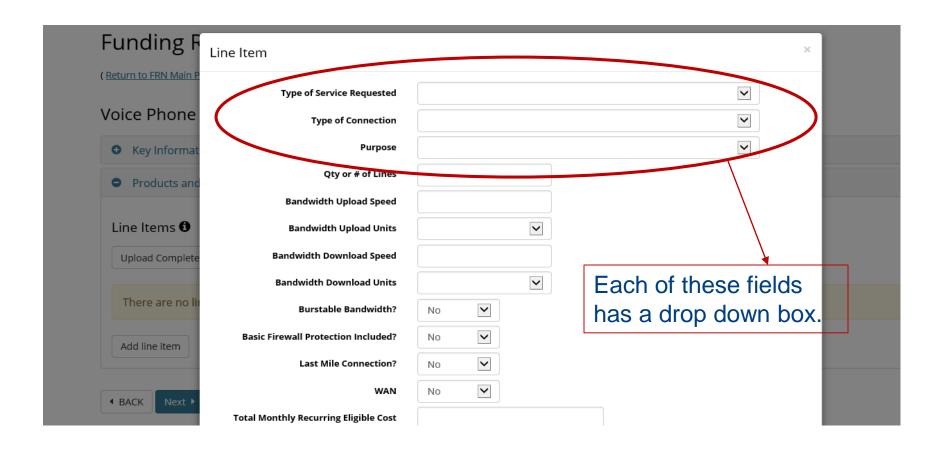
Funding Request 2718075

(Return to FRN Main Page)

Voice Phone Service

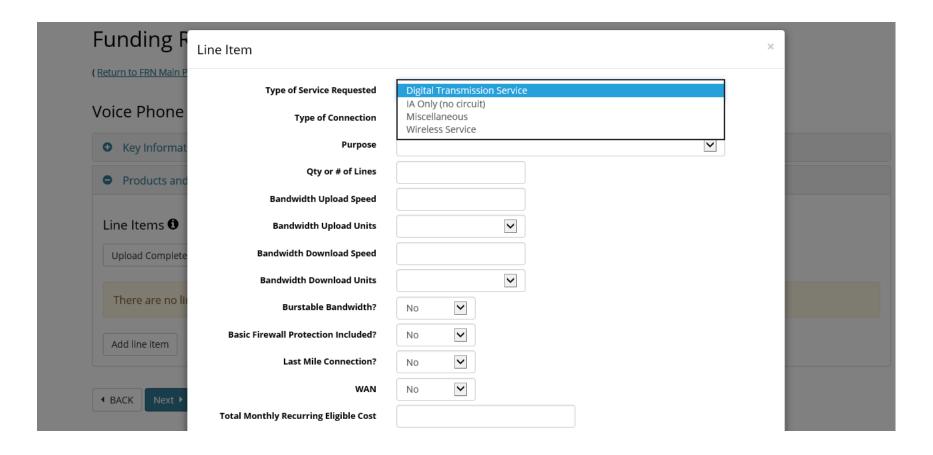


This pop-up screen appears after you select "Add Line Item."

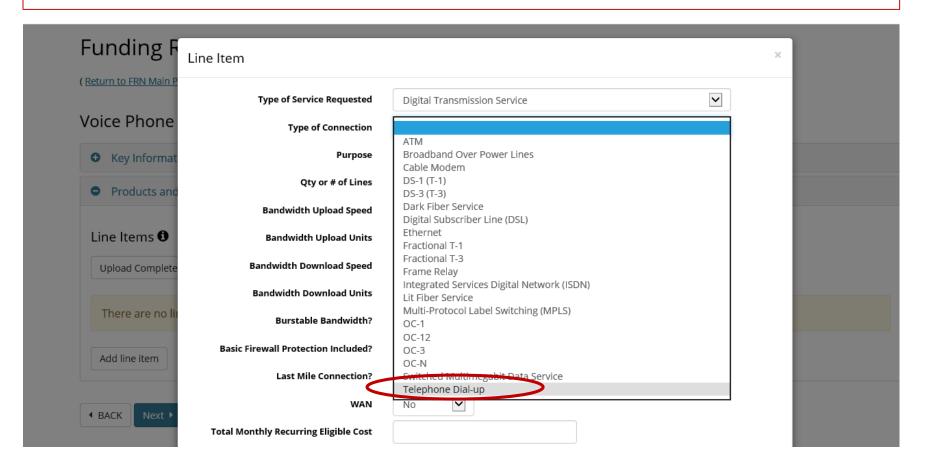


Type of Service: Select Digital Transmission Service for all phone service FRNs

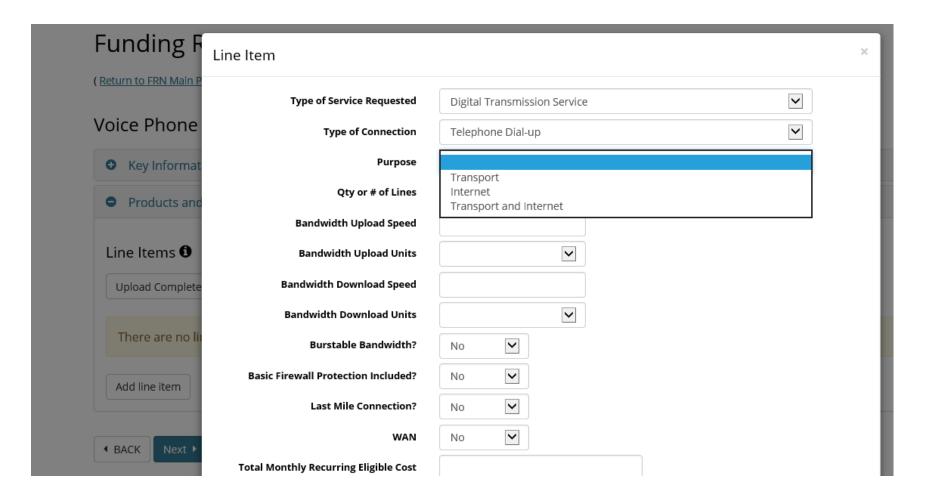
(both landline and cellular)



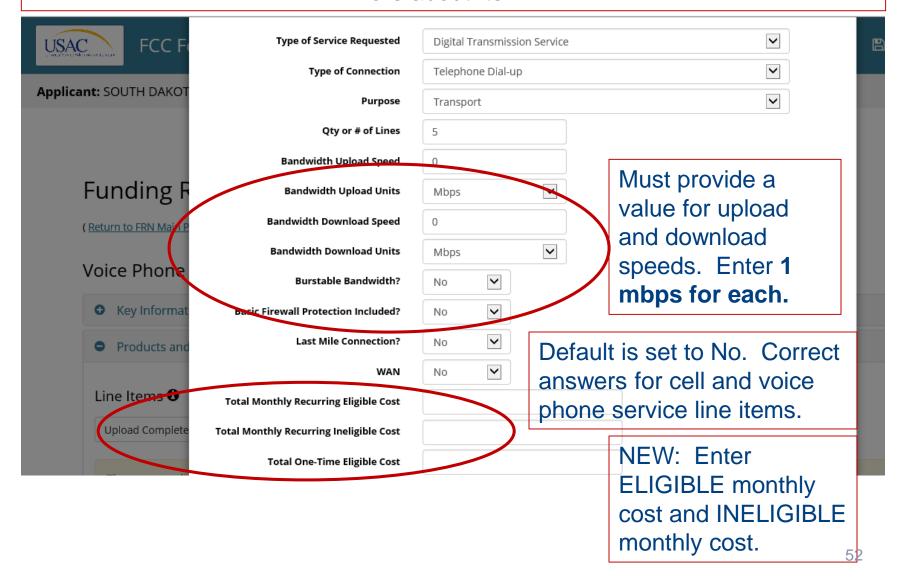
Type of Connection = Telephone Dial Up for most voice phone lines. Select this also for Cellular.



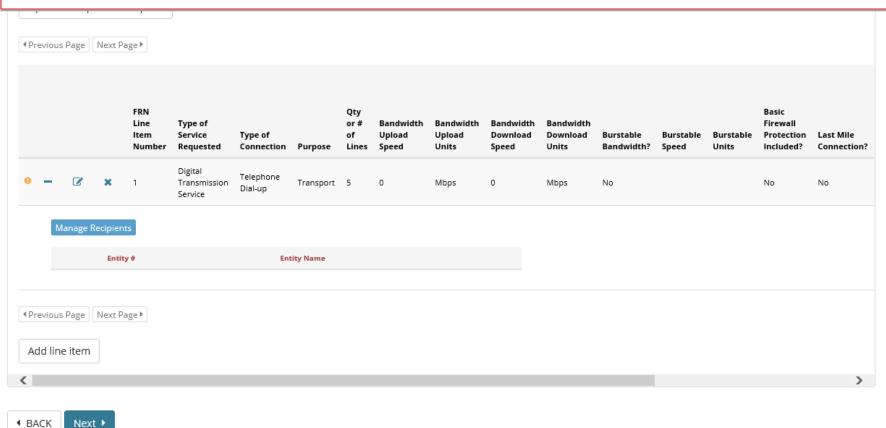
Purpose = Transport for voice and cellular lines



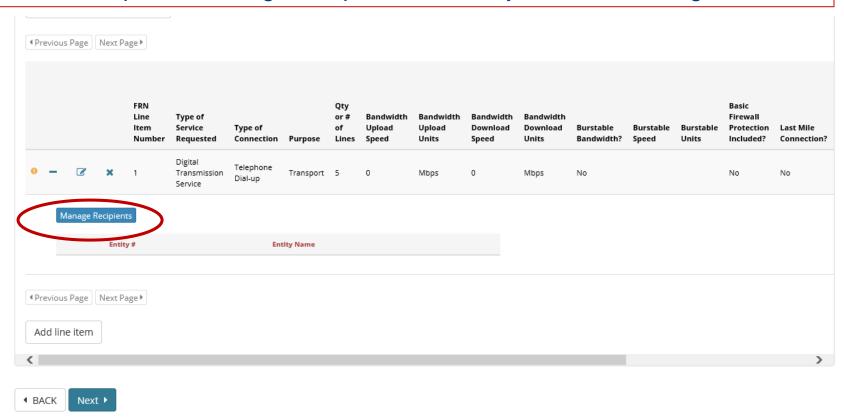
More about Item 21



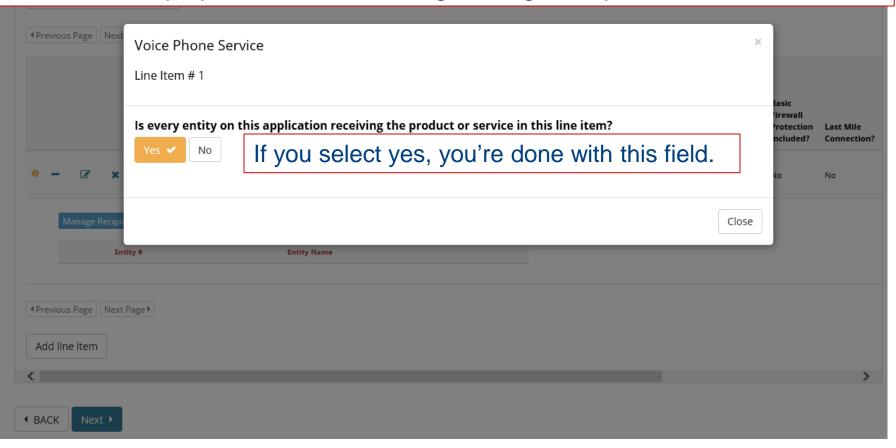
A **Line Item** for this FRN has been created. Usually a voice or cellular FRN will have one line item. If you have different kinds of services on your bill, enter another line item to describe that service.

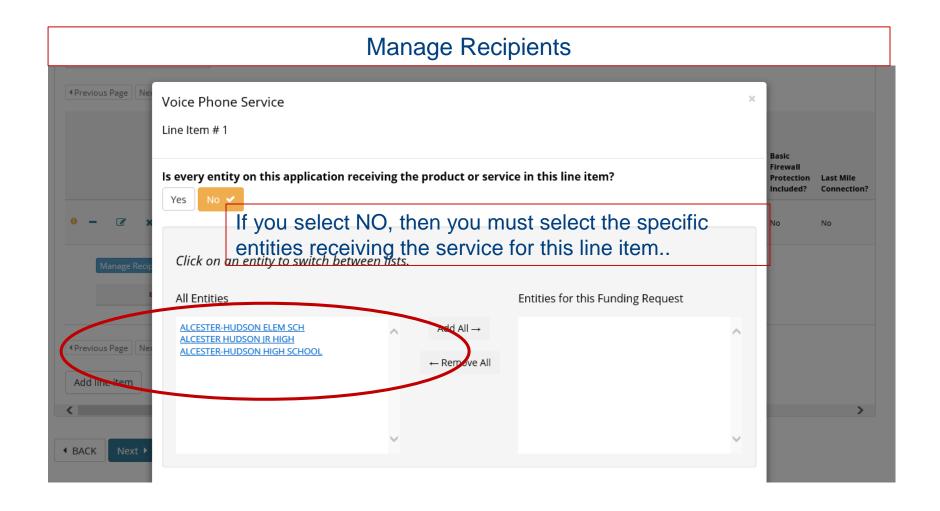


Next step is to "Manage Recipients" – identify entities receiving service.

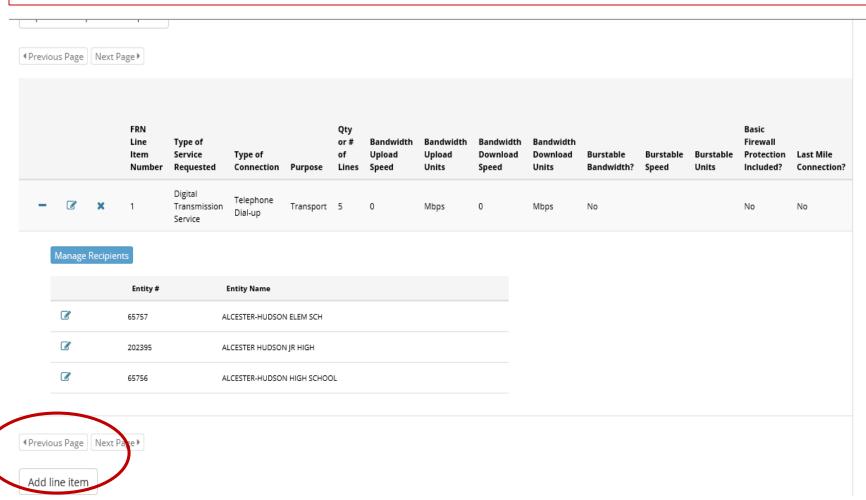


Pop-up screen after selecting "Manage Recipients" button.

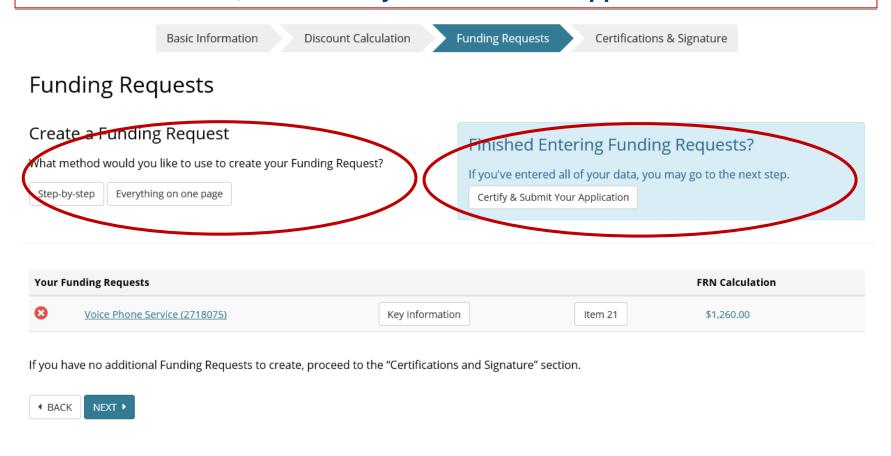




The screen that appears after you complete "Manage Recipients." If you have another line item, you would add it here.



If you have another Funding Request, begin here by selecting **Next.** If you're done, select **Certify & Submit Your Application.**



Certification Page – wording of some of the certifications have changed

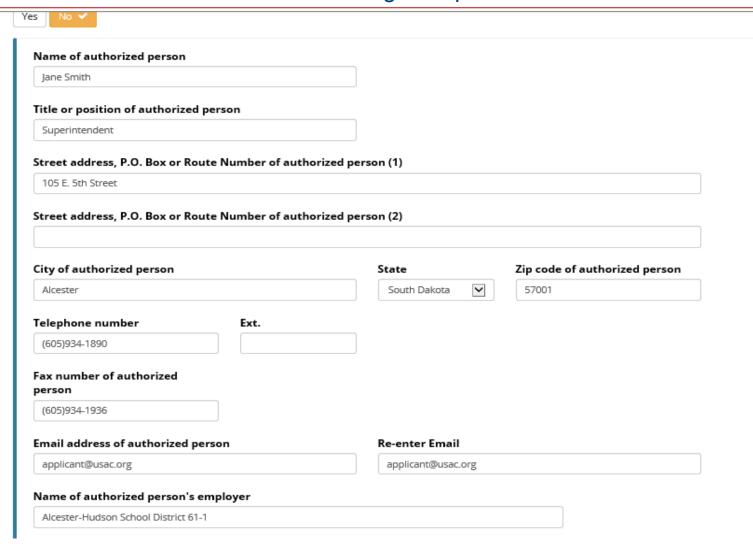
ceruncations & signature

- ✓ I certify that the entities listed in Block 4 of this application are eligible for support because they are:
- ✓ schools under the statutory definitions of elementary and secondary schools found in the No Child Left Behind Act of 2001, 20 U.S.C. §§ 7801(18) and (38), that do not operate as for-profit businesses and do not have endowments exceeding \$50 million; and/or
- ✓ I certify that the entity I represent or the entities listed on this application have secured access, separately or through this program, to all of the resources, including computers, training, software, internal connections, maintenance, and electrical capacity, necessary to use the services purchased effectively. I recognize that some of the aforementioned resources are not eligible for support. I certify that the entities I represent or the entities listed on this application have secured access to all of the resources to pay the discounted charges for eligible services from funds to which access has been secured in the current funding year. I certify that the Billed Entity will pay the non-discount portion of the cost of the goods and services to the service provider(s).

A Total funding year pre-discount amount on this FCC Form 471	\$1,800.00
B Total funding commitment request amount on this FCC Form 471	\$1,260.00
C Total applicant non-discount share	3340.69
D Total budgeted amount allocated to resources not eligible for E-rate support	Applicant \$\$ required here.
Total amount necessary for the applicant to pay the non-discount share of the the resource necessary to make effective use of the discounts	services requested on this application AND to secure access to \$540.00

□ Check this box if you are receiving any of the funds in Item E directly from a service provider listed on any of the FCC Forms 471 filed by this Billed Entity for this funding year, or if a service provider listed on any of the FCC Forms 471 filed by this Billed Entity for this funding year assisted you in locating

More Certification Page Requirements



Select Review Application before submitting

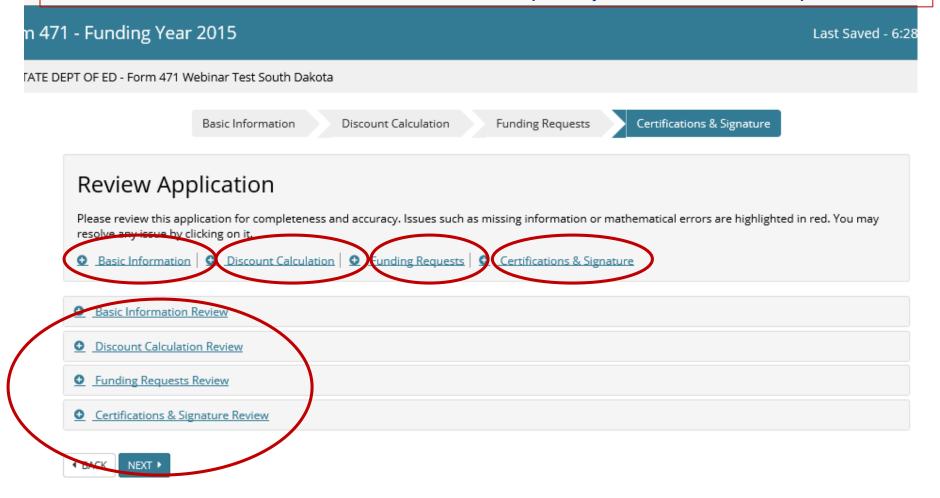
person		
(605)934-1936		
Email address of authorized person	Re-enter Email	
applicant@usac.org	applicant@usac.org	
Name of authorized person's employer		
Alcester-Hudson School District 61-1		
Submit 9 Cortify Your Application		
Submit & Certify Your Application		
1. Review Application		
Review this application to ensure it is complete and accurate.		
Review Application		
2. Submit Application		
After you submit this application, it can't be changed.		
Submit Application		
3. Certify		
All applications must be certified in order to be processed.		LISAC
Certify Online Display and Print Certification Certify Later		Universal Service Administrative Constanty

Certify Online

Display and Print Certification

Certify Later

IMPORTANT: In order to be able to print out your application, you must click on each of the buttons of each section to expand your form and then print it.



Debra Kriete

dmkriete@Comcast.net

888 232 0241

QUESTIONS?