

FY2026 E-Rate Roadshow



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State E-Rate Coordinator

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VISION

To create a world-class educational system that gives students the knowledge and skills to be successful in college and the workforce, and to flourish as parents and citizens



MISSION

To provide leadership through the development of policy and accountability systems so that all students are prepared to compete in the global community



1

ALL Students Proficient and Showing Growth in All Assessed Areas



2

EVERY Student Graduates from High School and is Ready for College and Career



3

EVERY Child Has Access to a High-Quality Early Childhood Program

EVERY School Has Effective Teachers and Leaders

4



EVERY Community Effectively Uses a World-Class Data System to Improve Student Outcomes

5



EVERY School and District is Rated "C" or Higher

6

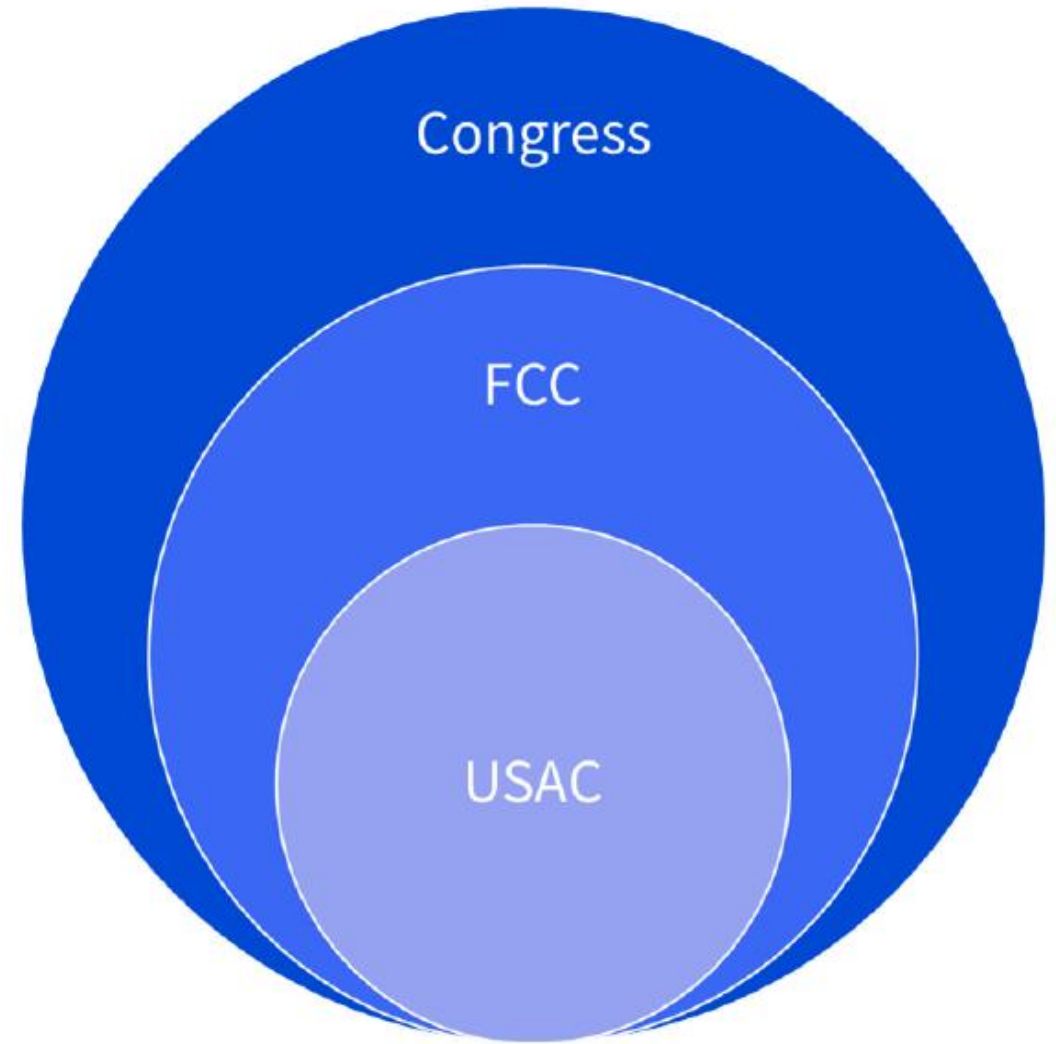


Agenda

- I. E-Rate Overview
- II. Application Process
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Overview

- Who makes the rules?
 - Congress wrote the Telecommunications Act of 1996, which directed the Federal Communications Commission (FCC) to establish the E-Rate Program and other programs.
 - The FCC issues orders that set rules and policies for the program and gives direction to the Universal Service Administrative Company (USAC) through orders.
 - USAC is responsible for the day-to-day administration of the E-Rate Program.



Program Overview

Provides funding to help schools and libraries obtain affordable telecommunications and internet access.

FY2025
Program Cap \$5.06B

Eligible Applicants

Public and private schools (K-12), libraries, and groups of schools and libraries (e.g. consortia, school districts, library systems), as well as Tribal schools, libraries, and Tribal college and university (TCU) libraries that also serve as a public library

Eligible Services

Schools and libraries are eligible for discounts between 20% and 90% of the costs of eligible equipment and services. The applicant pays the remaining share (e.g., a 90% applicant pays \$100 on a \$1,000 request). *Discount varies based on the school or library’s level of poverty, urban/rural status, and the type of service.

Category 1

Services that support connectivity to schools and libraries. For example, data transmission and Internet access service, including special construction services for network builds.

Category 2

Services that support connectivity within schools and libraries. This includes internal connections (e.g., routers, cabling, or other equipment needed for a Wi-Fi network); managed internal broadband services (MIBS), and basic maintenance of internal connections (BMIC).

Top C1 Purchases:

- Leased lit fiber
- Internet access provided over fiber or copper
- Commercially available internet access
- Cable provider internet
- Satellite internet

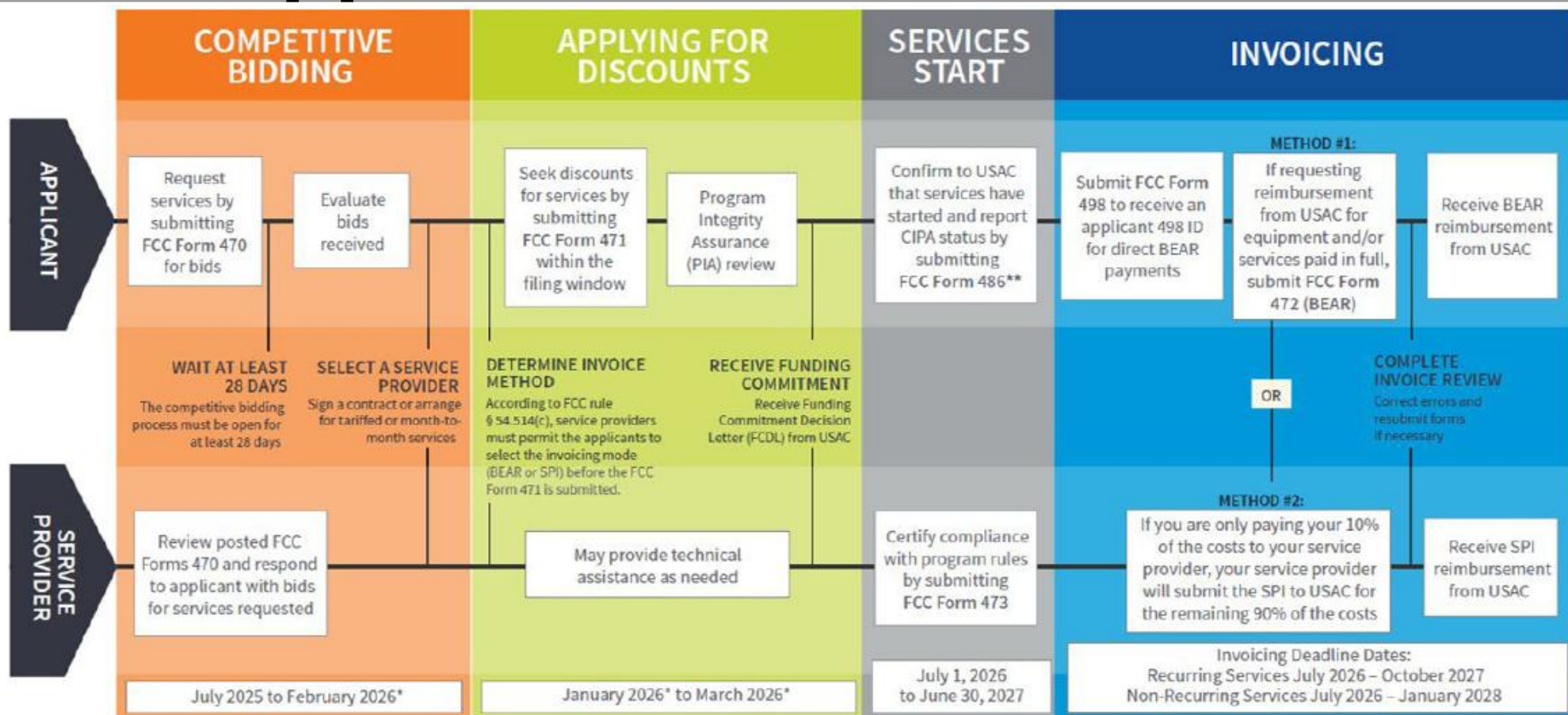
Top C2 Purchases:

- Internal Connections (IC): Cabling, routers, switches, modems, wireless access points, right to use licenses
- Basic Maintenance of Internal Connections: Repair and upkeep of eligible IC
- Managed Internal Broadband Services: Managed Wi-Fi agreements

Importance to Mississippi

- \$884,534,552.47 committed to Mississippi since 1998
- \$23,192,952.18 has been committed to Mississippi just for 2025
- The average discount for schools and libraries is 85%
- Every public school district in the state participates in E-Rate
- 98% of public libraries participate in E-Rate
- 100% of public schools have broadband internet fiber connections

E-Rate Application Process: FY2026



FOR MORE INFORMATION:

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

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

Tools & Resources

- USAC E-Rate website
 - <https://www.usac.org/e-rate/>
 - Announcements
 - Eligible Services List
 - E-Rate News Brief
 - Tools
 - Webinars
 - FAQs
 - Interactive User Guides

FY26 E-Rate Program Updates

FY2026 – 2030 Category 2 Budget

- FY2026 is the first year of the FY2026-2030 Funding cycle.
- Unused funds from the FY2021 – 2025 Category Two (C2) budget will not roll over to the FY2026 - 2030 funding cycle.
- The E-Rate C2 Budget Tool FY2021+ provides data on the FY2026 - 2030 C2 budget cycle. It is available on the Tools page along with a video on how to use the tool and a glossary of terms.
 - The tool will be updated to show C2 budget forecast data for the FY26-30 C2 budget cycle.
 - Applicants will be required to validate their student counts in the first year they apply for C2 support during the FY26-30 cycle.

FY2026 – 2030 C2 Budget Cycle Updates

FY2021-2025 C2 Budget Cycle

Libraries

- \$4.50/square foot
- \$25,000 funding floor
- Tribal libraries were eligible for up to \$55,000

Schools

- \$167/student
- \$25,000 funding floor

FY 2026-2030 C2 Budget Cycle

Libraries

- \$5.43/square foot
- \$30,175 funding floor
 - This means a library with less than 5,558 square feet ($\$5.43/\text{square foot} \times 5,557 \text{ square feet} = \$30,174.51$) receives the funding floor of \$30,175.
- Tribal libraries are eligible for up to \$66,385.
 - This means a Tribal library with less than 12,226 square feet ($\$5.43/\text{square foot} \times 12,225 \text{ square feet} = \$66,381.75$) receives the Tribal library funding floor of \$66,385.

Schools

- \$201.57/student
- \$30,175.00 funding floor
 - This means a school with fewer than 150 students ($\$201.57/\text{student} \times 149 \text{ students} = \$30,033.93$) receives the funding floor of \$30,175.

Establishing Your C2 Budget for this Cycle

- Update your entity profile in EPC during the Administrative Window
 - This information determines your discount
 - For instructions, please see the [Admin Window eLM](#).
- **Forecast Budget:** Beginning in the FY2026-2030 budget cycle, all entities will have a Forecast budget status based on the information in their EPC profile. This means that any updates you make to the entity profile will automatically reflect in an updated budget amount, without the need to request a replacement budget.

The screenshot displays the EPC system interface for 'Records / Applicant Entities' under the entity '#126423 - FAIRFAX COUNTY PUBLIC SCHOOLS'. The 'Category Two Budget' tab is selected, showing the 'Category Two Budget Status' section. A note indicates that the budget information reflects data starting in FY2016. The '2026-2030' budget cycle is expanded, showing a 'Forecast' status. A table summarizes the budget details for the 2026-2030 period, with the 'Forecast' status highlighted in a green box. Below this, a 'Category Two Budget Details' table shows the funding year, budget status, and budget amount for each year from 2026 to 2030. The 'Forecast' status is also highlighted in a green box in this table. A 'SHOW ALLOCATION BREAKDOWN' button is visible, and a note at the bottom states that the district's schools manage the Category Two Budget information for the FY2015 to FY2020 budget cycle.

Records / Applicant Entities
#126423 - FAIRFAX COUNTY PUBLIC SCHOOLS

Summary Customer Service Modifications Additional Information Discount Rate **Category Two Budget** Contracts FCC Forms FRN Appeals News Related Actions

Category Two Budget Status

Category Two Budget information presented below reflects data starting in FY2016.

▼ 2026-2030

▼ 2026-2030 (Budgeted Entity)

► Show column definitions

Budget Status	Budget	Total In-Review Requested Costs	Total Committed Costs	Total In-Review Requested and Committed Costs	Remaining Budget	
Forecast	\$31,284,611.00	-	-	-	\$31,284,611.00	Hide Details

Your student count has changed relative to the count used to establish your existing C2 budget. To request a replacement C2 budget in 2025, click [Request Replacement C2 Budget](#).

Category Two Budget Details

Funding Year	Budget Status	Budget	Funding Year In-Review Requested Costs	Total In-Review Requested Costs	Funding Year Committed Costs	Total Committed Costs	Total In-Review Requested and Committed Costs	Remaining Budget
2026	Forecast	\$31,284,611.00	-	-	-	-	-	\$31,284,611.00
2027	-	-	-	-	-	-	-	-
2028	-	-	-	-	-	-	-	-
2029	-	-	-	-	-	-	-	-
2030	-	-	-	-	-	-	-	-

5 items

[SHOW ALLOCATION BREAKDOWN](#)

► 2021 - 2025

Your district's schools manage the Category Two Budget information for the FY2015 to FY2020 budget cycle. Please visit the associated school profiles for more details.

Establishing Your C2 Budget for this Cycle

- **Preliminary Budget:** The entity has **certified** a Form 471 application within the FY2026-2030 C2 budget cycle. This means that the entity has certified the accuracy of the budget data currently in the entity profile.
- **Confirmed Budget:** Program Integrity Assurance (PIA) review of FY2026-2030 C2 Form 471 application is **complete**. The C2 budget in the entity profile is now **fixed**. It can only be changed via an Appeal for the current FY. Beginning in FY2027, the entity can request a replacement C2 budget if the student count has increased for the next year.

Transitioning Services

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

Funding Caps – Devices and Internet

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

Transitioning Services: Example

Cutover on the **Same** Date

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

Cutover on **Different** Dates

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

Transitioning Services: Spin / Service Substitute

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

Administrative Window

Admin Window

- The administrative window allows applicants to update their profiles in the E-rate Productivity Center (EPC).
 - Will close shortly before the Funding Year (FY) 2026 FCC Form 471 application filing window opens.
- Why is there an administrative window?
 - Libraries and consortia depend on static student counts to accurately calculate their discounts.
 - For consistency, certain entity information cannot be changed during the application filing window.

FY26 Admin Window

- Admin open for 2-3 months prior to Form 471 window
 - Open now – October 15, 2025 – January 2026
- Used for:
 - E-Rate discounts
 - NSLP
 - CEP -- 25%
 - Alternative method
 - Category 2 budgets
 - Different from enrollment data
 - Change budget only if there is an increase
- ****Admin Window changes from year to year**

Admin Window

- **Entity Profiles**

- Update information on parent and child entities

- **Contract records**

- These can be created after the admin window closes.
 - File these requests BEFORE Form 471 is started

- **C2 budget tool**

- This tool will show updated C2 budgets the day after you change your profile information.

- **School districts with ten or fewer schools**

- We recommend that you enter your student counts individually by school to maximize the number of options available for your C2 budget calculation.

EPC Account Administrator

- Account Administrators can:
 - Create new users
 - Modify the rights of existing users
 - Modify information about their organization
 - Link or unlink their organization to consulting firms
 - Modify (change) the Account Administrator
 - Deactivate users who no longer work for the organization.

EPC – User Permissions

NewsTasksRecordsReportsActions

SUappian

Manage User Permissions

Organization Details

Name

School District 10

Address

100 Main Street
Natchez, MS 39120
Adams

Mailing Address

100 Main Street
Natchez, MS 39120
Adams

FCC Registration Number

1231231232

Organization Type

Applicant

Phone Number

555-555-3333

Email

school.district10.user1@mailinator.com

User Permissions

☒ EPC User Permissions

☐ CBR User Permissions

In the table below, you can designate the permissions that you wish to give to each of your users for the various tasks you can complete in the portal. This table will continue to grow as more functionality comes online.

- Full rights users can start, complete, submit and certify forms.
- Partial rights users can start and enter data in the form, but cannot submit and certify them.
- View Only users can only see forms created by other people in your organization but cannot create forms themselves.
- Form 498 School or Library Officials can start, complete, submit, certify, modify, and deactivate Forms 498.
- Form 498 General Financial Contacts can start, complete, and submit Forms 498, but cannot certify new or updated Forms 498 or deactivate existing Forms 498.
- Post-Commitment Full and Partial rights user can start, complete, and submit Spin Change and Service Substitution requests. Post-Commitment View Only rights can view the submitted Spin Change and Service Substitution requests.

Name	Email	Apply All	470 Permission	471 Permission	BEAR/472 Permission	498 Permission	Post-Commitment Permission	486 Permission	Appeals Permission
School District 10 User 1	school.district10.user1@mailinator.com		Full	Full	Full	School or Library Official	Full	Full	Full

CANCEL

SUBMIT

District Discount

INCOME Measured by % of students eligible for the National School Lunch Program (NSLP)	CATEGORY ONE (C1)		CATEGORY TWO (C2)	
	URBAN Discount	RURAL Discount	URBAN Discount	RURAL Discount
Less than 1%	20%	25%	20%	25%
1% to 19%	40%	50%	40%	50%
20% to 34%	50%	60%	50%	60%
35% to 49%	60%	70%	60%	70%
50% to 74%	80%	80%	80%	80%
75% to 100%	90%	90%	85%	85%

Updating Entity / Student

- Update School names / addresses / type
- Update student counts
 - Full time student count
 - Free/reduced lunch (NSLP)
 - CEP base year
- Category 2 budget student count

FY2026 CEP

- The minimum allowable Community Eligibility Provision (CEP) % changed from 40% to 25% starting in FY 2024.
- Applicants are no longer required to submit a Receipt Acknowledgement Request (RAL) for CEP % between 25-39%.
- Applicants can now update the CEP % in their EPC entity profile for 25%+.
- Reminder: Check the base year to ensure it is updated to the start of your CEP cycle.
 - If base year is 2021 or 2022, a new/updated base year needs to be entered!

Eligible Services & Categories

Eligible Services List

- Each year, the FCC issues a list of services that are eligible for the upcoming funding year.
- **Category One** includes services from the service provider to the schools and/or libraries (demarcation point).
 - Data Transmission and/or Internet Access
- **Category Two** includes services and equipment needed for broadband connectivity within schools and libraries.
 - Three service types –
 - Internal Connections
 - Basic Maintenance of Internal Connections (BMIC)
 - Managed Internal Broadband Services (MIBS)

Eligible Services List (ESL)



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[Rural Health Care](#) ▾

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[Service Providers](#) ▾

[USAC](#) | [E-Rate](#) | [Applicant Process](#) | [Before You Begin](#) | **[Eligible Services List](#)**

Applicant Process

[Step 1](#) >

[Before You Begin](#) ^

[Before You Begin](#)

[School and Library Eligibility](#)

[Bus Wi-Fi Overview](#)

[Off-Premises Wi-Fi Hotspots Overview](#)

[Consortia](#)

[Non-Instructional Facilities \(NIFs\)](#)

[Non-Traditional Education Eligibility](#)

[Educational Service Agencies](#)

Eligible Services List

The Eligible Services List (ESL) for each funding year provides guidance on the eligibility of products and services under the Schools and Libraries Program.

[ESL Glossary](#)

[Frequently Asked Questions](#)

[2025 Eligible Services List](#)

[2024 Eligible Services List](#)

[2023 Eligible Services List](#)

[2022 Eligible Services List](#)

[2021 Eligible Services List](#)

[2020 Eligible Services List](#)

Category 1 & 2

- Category 1
 - Services needed to support broadband connectivity to eligible schools and/or libraries
- Category 2
 - Services needed for broadband connectivity within schools and/or libraries
 - Services needed to bring broadband into and provide it throughout schools and libraries.
- Equipment and services may be fully or only partially eligible for E-Rate Support.

Categories of Service

- Category 1 (C1)
 - Data Transmission and/or Internet Access
- Category 2 (C2)
 - Internal Connections, Managed Internal Broadband Services, and Basic Maintenance of Internal Connections
 - Applicant has a budget or limit on how much funding can be requested
 - Budget covers a five-year period (FY2026 – 2030)

Category 1 Services

- Leased lit fiber or leased lit dark fiber
- Internet access
- Satellite service
- T-1,T-3, etc.
- DSL
- Broadband over power lines

Category 1 Services Eligible Costs

- Monthly charges
- Special construction
- Installation and activation charges
- Software
- Modulating electronics/equipment necessary to make an eligible Category 1 broadband service functional
- Maintenance and operation charges, including costs for software needed in the operation of or maintenance of network equipment

Category 2 Services

- Services or equipment that go inside the school or library
 - Subcategories:
 - Internal Connections (IC)
 - Basic Maintenance of Internal Connections (BMIC)
 - Managed Internal Broadband Services (MIBS)
 - Maximum discount – 85%
 - 5-year budget cycle (Based on number of students multiplied by \$201.57)
 - Equipment received from April 1 of start year through September 30 of end year (15 months)
 - Can apply for 1 year extension if needed (Request must be made by September 30)

Basic Maintenance of Internal Connections

- Basic Maintenance of Internal Connections is the **repair and upkeep of eligible internal connections**.
 - The two types of Basic Maintenance Internal Connections are:
 - **In-Person Services**, which include on-site repairs (Time and Material Contracts)
 - **Remote Services**, which include Maintenance Support Services (such as, basic technical support, configuration changes, bug fixes, patches, software upgrades, support service subscription licenses, technical support licenses)
 - The equipment being maintained must be eligible in order for the maintenance to be eligible for E-Rate support. If repair or replacement work is performed under a maintenance contract, USAC only reimburses for the **actual work performed**.

BMIC Examples: Included

- Repair and upkeep of eligible hardware
 - Wire and cable maintenance
 - Configuration Changes
 - Basic technical support including online and telephone-base technical support
 - Software upgrades and patches including bug fixes and security patches
 - Licenses that provide maintenance functionality
-
- Any license that provides **maintenance functionality** should be requested under **BMIC** on the FCC Form 470/471 (not client access or right to use licenses).

BMIC Examples: Excluded

- Actual equipment
 - These are eligible under Internal Connections
- Unbundled warranties
- Network management services, including 24-hour network monitoring
 - These are eligible under MIBS
- Management, operation and monitoring on eligible broadband internal connections
 - These are eligible under MIBS
- Maintenance on ineligible equipment
- Internal connections software (including Right to Use and Client Access Licenses to make equipment functional): Internal connections software allows the equipment to function and distribute high-speed broadband. They do **not** provide support or maintenance and are therefore ineligible as BMIC. Such software is eligible as **Internal Connections**.

Mixed Functionality

- Some equipment has mixed BMIC & Internal Connections functionality
 - Some vendor licenses may include both BMIC & IC functionality such as Right-to-use and maintenance services on the same license
 - Split the license based on functionality in separate FRNs – BMIC & IC
 - Contact the manufacturer or USAC's Customer Service Center (CSC) to obtain the breakdown for specific functionality that is included in a specific mixed services license
- During competitive bidding process make sure the Form 470 has both BMIC and IC listed
- Applicant may need to contact USAC if classification is wrong on Form 471
 - RAL – before FCDL
 - Service Substitution – after FCDL

Changing Service Types after Submitting Form 471

- All services must be properly bid during the FCC Form 470 process.
- Be sure to confirm that you are posting for all service categories for which you are requesting bid responses on the FCC Form 470.
- FCC Forms 470 with the correct service type are required for corrections to be made on the FCC Form 471.
- To request changes identified **after** the FCC Form 471 is certified and **before** the FCDL is issued:
 - Submit a Receipt Acknowledgement Letter (RAL) modification request
- To request changes identified **after** the FCDL is issued:
 - Submit a Service Substitution request with a detailed narrative
 - Background information
 - Calculation for changes (single vs. multi-year)
 - Reason for the correction

Multi-Year Maintenance Support Services

- These are preventive and remedial services that physically repair or optimize hardware, including maintenance under contract and per-incident repair
- Services are only eligible for **one funding year** at a time.
- You must apply for funding for each year separately.
 - Example: A 3-year maintenance contract for \$12,000 can be submitted for reimbursement for each funding year associated for a maximum of \$4,000 per funding year.
 - Prorate the cost of the service for one year and only invoice after the services are received **for the applicable funding year**.
 - If services extend outside the funding year window, the invoice will be modified to only pay the current funding year services.
 - Inform the reviewer which year of the **multi-year** contract you are invoicing for.
 - Example: 3-year maintenance contract for **FY2024–2027**. When submitting your request for your 2nd year, indicate that fact to the reviewer.

Category 1 & 2 Budget

- **Category One (C1)** services are not limited in cost as long as they are cost- effective (except as noted below).
 - The recently-adopted Wi-Fi Hotspot Order adopts a budget and funding caps for Wi-Fi hotspots and services.
 - Delivered between July 1, 2026 – June 30, 2027
- **Category Two (C2)** services are limited by a pre-discount cost ceiling (the “Category Two budget”)
 - Budget period is five years
 - Budget is calculated based on:
 - Schools: Number of full-time students in the school
 - Delivered between July 1, 2026 – September 30, 2027
 - Can be extended for up to 1 year

Category 2 Budget

- **C2 budgets changed to a fixed, five-year cycle.**
- C2 multipliers and funding floor are set once at the beginning of the cycle.
- They apply to the entire cycle.
- They will be announced in advance of the cycle, adjusted for inflation once, before the cycle starts, and rounded to two digits (dollars and cents).
- For the FY2026-FY2030 cycle:
 - The school multiplier is \$201.57 per student.
 - The minimum funding floor is \$30,175.00.
 - Special funding for 10 schools or less.
- C2 budgets are pre-discount
- NIFs are not eligible

Advanced Installation

- Some **Category One** non-recurring equipment can be installed as early as January 1, prior to the July 1 start of the funding year, if certain conditions are met.
- **Category Two** non-recurring services can be installed beginning April 1 before the start of the funding year.



Advanced Installation – Cat 1

- Advanced installation for non-recurring **Category One** equipment and services can occur provided the following conditions are met:
- The construction begins after selection of the service provider
- The service provider must be selected pursuant to an FCC Form 470 posting
- A Category One recurring service must depend on the installation of the infrastructure
- The Category One recurring service's actual start date is on or after July 1 of the funding year.

Advanced Installation - Cat 2

- Advanced installation of non-recurring **Category Two** equipment and services:
- Services cannot start until after the **28-day competitive bidding process** is completed and the service provider is selected.
- Funding is not guaranteed until USAC issues a Funding Commitment Decision Letter.

**** Reminder**

- Funding is not guaranteed until USAC issue a Funding Commitment Decision Letter (FCDL)
- Invoices – Form 472 and Form 474 – cannot be dated before July 1 of the funding year

Fiber Types

1. Leased lit fiber

The applicant pays a monthly fee to the service provider who provides the fiber, the connections, the network equipment, and the data transport and/or internet access service. The service provider also manages and maintains the network.

2. Leased dark fiber

The applicant leases a portion of a fiber network owned by a service provider and pays separately for the network equipment, maintenance and operations, and data transport and/or internet access service over that fiber.

3. Self-provisioned network

Applicant ownership of a high-speed broadband network. The applicant hires a vendor to construct the network or a portion of the network, and thereafter completely or partially owns and maintains that network or portion. An E-Rate eligible entity may share the services and equipment used to construct and/or operate a self-provisioned network supported by E-Rate funding with an ineligible third-party entity so long as the ineligible third-party entity pays its fair share of the costs, i.e., its pro-rata portion of the undiscounted costs of the network.

Fiber Types

3. Self-provisioned network cont.

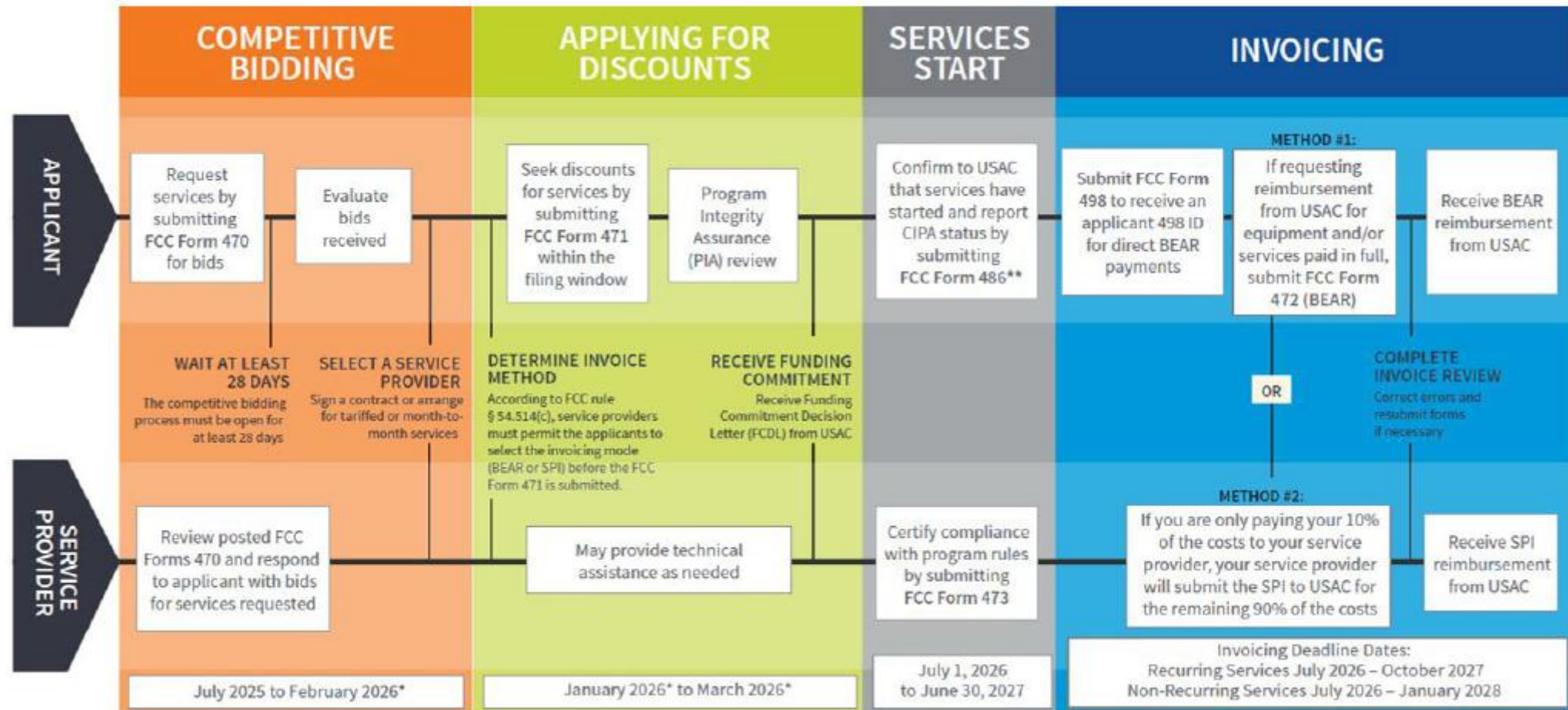
- Self-provisioned networks are a technology-neutral eligible service. Applicants may self-provision a fiber network, but applicants may also self-provision networks using other technologies (i.e., fixed microwave) or a mix of fiber and other technologies. In light of this, the FCC adopted a technology-neutral competitive bidding standard for self-provisioned networks – service provided over third-party networks.
- If an applicant specifies a requested bandwidth that other providers can supply, the technology-neutral competitive bidding standard expands the competitive bidding pool and helps to ensure that applicants requesting E-Rate support for self-provisioned networks only do so when it is the most cost-effective service option to meet their connectivity needs. It is possible that based on the applicant's bandwidth specifications that fiber may be the only option for receiving the requested bandwidth.

Questions



Application Process

E-Rate Application Process



Application Process Overview

E-Rate Step	Suggested Timeline
1. Assess Needs / Create Plan	August – November
2. Update EPC Profiles – Admin Window	October – January (closes 3 days prior to Form 471)
3. Bid all new services / equipment (Form 470)	July – December
4. Bid evaluation (after 28-day Form 470 waiting period)	August - February
5. Board Approval / Sign Contracts	September – February
6. Request E-Rate funding – Form 471	January – March (TBD by USAC)
7. Application review (PIA)	April – August
8. Funding Commitment – FCDL	April – August
9. Turn on funding / CIPA Compliance – Form 486	FCDL Receipt or service start date
10. Receive services	July (start year) – June (end year)
11. Pay vendor	July (start year) – June (end year)
12. Submit invoice to USAC (Payment) applicant - BEAR /Vendor - Form 474	Anytime after start of service – must be filed by October 28 of end year without extension request.

Applicant Forms and Important Dates Reminder

Competitive Bidding ➡ **Apply for Discounts** ➡ **Start Services** ➡ **Invoice USAC**

FY2024:

July 2023 - February 28, 2024

FY2025:

July 2024 - February 26, 2025

FY2026:

July 2025 - February 2026*

FY2024:

January 17, 2024 - March 27, 2024

FY2025:

January 15, 2025 - March 26, 2025

FY2026:

January 2026 - March 2026*

FY2024:

July 1, 2024 - June 30, 2025

FY2025:

July 1, 2025 - June 30, 2026

FY2026:

July 1, 2026 - June 30, 2027

Recurring Services

FY2024: July 2024 – October 2025

FY2025: July 2025 – October 2026

FY2026: July 2026 – October 2027

Non-recurring Services

FY2024: July 2024 – January 2026

FY2025: July 2025 – January 2027

FY2026: July 2026 – January 2028

470

471

486

472
(BEAR)

OR

474
(SPI)

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

Competitive Bidding Steps



THE COMPETITIVE BIDDING PROCESS

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



The process consists of five steps:

- 1** Get Ready to File
 - Perform a needs assessment
 - Review your state and local procurement rules
 - Review the [Eligible Services](#) List
- 2** [File and certify an FCC Form 470](#)
 - Provide sufficient information for potential vendors to provide a comprehensive bid (e.g., for managed internal broadband services specify the exact equipment/services to be managed)
 - Potential bidders (service providers) cannot help you file FCC Form 470
 - You have the option to submit a Request for Proposals (RFP) with your form
 - There are [competitive bidding exemptions](#) for certain Category 1 and Category 2 (libraries only) equipment/services
 - After you certify your FCC Form 470, USAC issues a Receipt Notification Letter (RNL) with your Allowable Contract Date (ACD) – the earliest date you can enter into an agreement or sign a contract
- 3** Ensure an [open and fair process](#)
 - Provide any FCC Form 470, RFP and other information/updates in EPC for all potential bidders for at least 28 days
 - “Open” means there are no secrets in the process and that all bidders know what is required of them
 - “Fair” means that all bidders are treated the same and that no bidder has project information others do not
 - Abide by the [Gift Rules](#)

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

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

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



Retain all [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.



MISSISSIPPI
DEPARTMENT OF
EDUCATION

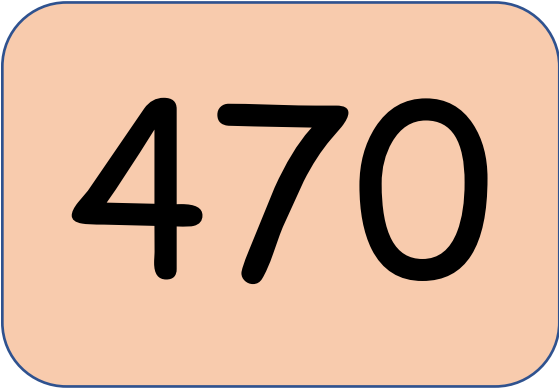
Applicant Role

- Determine services needed, file FCC Form 470 and RFP
- Run competitive bidding process
- Select winning bidder, with price of eligible products and services as primary factor
- Respond to PIA
- File other applicant forms (FCC Forms 471, 486, 472, 500, etc.)
- Document compliance with FCC rules on an ongoing basis
- Retain documentation for at least ten years from last date of service delivery
- Form 470 can be cancelled by Account Administrator (**New**)

What are my needs?

- Check with your schools to identify their needs
 - More Bandwidth?
 - Expanded Wi-Fi?
 - Access Points?
- Check with your Budget Officer to see what your Technology Budget looks like
 - Don't ever try to go where your budget can't take you
- Check your C2 Budget Tool to see if you have enough to purchase C2 services
- Check with your Superintendent to see what your districts goals are in relation to what your students or library patrons actually need
 - Don't ever try to go where the Superintendent does not want to go

Posting the Form 470



470

- Competitive Process
- Competitive Bidding
- Request for Proposal (RFP)
- Recurring vs Non-Recurring
- State Procurement Rules
- Reverse Auction
- Contracts

When to file Form 470?

- Must be posted in EPC at least 29 days prior to the close of the Form 471 window
 - **Example:**
 - Form 471 window deadline is March 25
 - February 24 is Form 470 deadline
 - Do not wait this long!!!
 - Always give yourself several days to evaluate bids, negotiate contracts, seek board approval, sign contracts, upload contract, etc.
 - All items listed above must be completed prior to filing Form 471
 - Always give yourself enough time just in case something goes wrong

Competitive Process

1. Get ready to file
2. File & certify Form 470
3. Ensure an open & fair process
4. Wait at least 28 days before selecting service provider
5. Select service provider

Competitive Bidding

- Run an open and fair competitive bidding process.
 - **Open** = information shared with one bidder must be shared with all.
 - **Fair** = bidders must be evaluated fairly and equally.
- Wait 28 days before choosing a service provider.
 - FCC Form 470 must be posted on the USAC website for a minimum of 28 days before you select a vendor and file an FCC Form 471.
- Evaluate bids using the price of the eligible services as the primary factor.

Request For Proposal

- Requests for Proposal (RFPs) may be created to describe specific needs and circumstances in more detail.
- USAC refers to an RFP or an RFP document generically.
 - RFP documents are any documents that provide additional information to potential bidders on the scope or details of your project.
 - For most types of service requests, RFPs are not required. However, you must issue an RFP for some requests or if you are required to do so by state/local rules.
 - Services on your FCC Form 470 and RFP must match.
 - All RFPs and RFP documents must be attached to your FCC Form 470 in EPC.
- When unsure about what type of service to request bids for, request bids on both
 - i.e. Internal connections or Basic Maintenance of Internal Connections

Requests for Proposal (RFP)

- RFP not required, except for:
 - State bidding requirements
 - All dark fiber or self provisioned fiber projects
- USAC considers any bidding documents provided to a vendor an RFP
- If using an RFP
 - All documents must be uploaded in EPC at time of Form 470 posting
 - Cannot cite to a website bidding advertisement
 - Any changes must be given to all vendors after application is submitted
 - Changes must be added to Form 470
 - 28-day clock will restart

Common Bidding Errors

- Provide **sufficient information** for potential bidders to **provide a comprehensive bid** (e.g., for managed internal broadband services specify the exact equipment/services to be managed). Include all information needed on the FCC Form 470/RFP for potential vendors to provide a comprehensive bid.
- Ensure **price is the primary evaluation factor** (highest weighted factor). Only the costs of *eligible* equipment/services should be evaluated in this criterion.
- Potential bidders (i.e., service providers) cannot help you complete or file the FCC Form 470.
- Retain all necessary competitive bidding **documentation** for ten (10) years after the last day you receive services or the end of that funding year, whichever date is later.
- Ensure that **all equipment/services you request on the FCC Form 471 is listed on the FCC Form 470/RFP** (including all bandwidth speeds).
 - Specifically for Internet Access/Data Transmission Services, applicants should ensure that speeds of services requested on the FCC Form 471 are reflected on the FCC Form 470/RFP.
- Select a service provider **after your allowable contract date and before certifying the FCC Form 471**.

Mixed Eligibility- Products & Services

- **Mixed eligibility** refers to equipment and services for which only a portion is eligible for discounts under the E-Rate program.
- In general, a cost allocation, separating the eligible and ineligible costs, is required if an equip mentor service:
 - Contains both eligible and ineligible components — for example, a data T1 circuit (eligible) that also has channels on the circuit dedicated to voice services (ineligible);
 - Is utilized for eligible and ineligible uses — for example, a server that is used for both caching (eligible) and video distribution (ineligible); or
 - Is delivered to both eligible and ineligible locations— for example, broadband service delivered to a school run by a church (eligible) and to the church office (ineligible).
- There is no single approved method to allocate eligible and ineligible costs. Your method must use tangible criteria that result in a reasonable allocation.

Evaluating Bids

- After bid due date (at least 29 days) applicant reviews all qualified submissions
- Must have and retain a bid matrix
- Price of eligible services/equipment must be the most heavily weighted factor during evaluation
 - Sample criteria
 - Quality of proposed solution
 - Cost of ineligible items
 - References
 - Experience with vendor
 - Ability to meet installation deadline
- Retain all winning and losing bids and all correspondence between applicant and vendors (winning and losing)

No Bids?

- Document via an email or file memo that no bids were received
- Existing services: can continue to receive services from existing service provider
- New Services/Procurement: Solicit bid from willing vendor
 - Make sure price is cost effective
 - Check marketplace options from other vendors in your area or nearby areas
 - Save research and information to justify buying service for this vendor

Receipt Notification Letter (RNL)

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

Bid Matrix

- To evaluate incoming bids, create a **bid evaluation matrix** or similar document.
- Develop evaluation criteria or factors to assess the bids.
 - You can have one or multiple factors.
 - You may also use disqualifying factors.
- Assign each evaluation factor a point value or percentage.
 - Ensure that **price is the primary evaluation factor**. The **cost** of the **eligible equipment and services** must be the **most heavily weighted factor**. Only the costs of *eligible* goods/services should be evaluated in this criterion.
 - Other factors can be considered, but they must be weighted less than the price of eligible equipment and services.

Bid Evaluation Matrix - Sample

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

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

Form 470 - Example

- FCC revamped Form 470 in attempt to remove “gotchas”

Add New Service Request

- ☒ I seek bids for internet access and/or data transmission service.
- ☐ I seek bids for Category One network equipment or maintenance and operations.

Most common

Both Internet AND data circuit (*use this especially for Internet and cable modem, DSL requests*)

☐ I seek bids for Internet access and data transmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/non-fiber hybrid networks, or non-fiber networks such as cable, DSL, copper, satellite, or microwave).

Commodity Internet only (*no circuit - rare*)

☐ I seek bids for internet access without data transmission service and will arrange for separate data transmission service if required.

Data circuits only (WANs) or dark/lit fiber requests – No Internet (*common for districts and multi-site networks*)

☐ I seek bids to purchase data transmission service only (i.e., that does not include internet access service).

Self-provisioned network (*build/own your own network - rare*)

☐ I seek to build my own network.

Form 470 - Example

- 1st or 3rd Options have additional radial options:

☒ I seek bids for Internet access and data transmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/non-fiber hybrid networks, or non-fiber networks such as cable, DSL, copper, satellite, or microwave).

☐ I seek bids for internet access without data transmission service and will arrange for separate data transmission service if required.

☒ I seek bids to purchase data transmission service only (i.e., that does not include internet access service).

☐ I seek to build my own network.

☒ I seek bids for internet access and/or data transmission service.

☒ I seek bids for Internet access and data transmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/non-fiber hybrid networks, or non-fiber networks such as cable, DSL, copper, satellite, or microwave).

☐ I seek bids for internet access and data transmission services, whether offered by one service provider(s) as a bundled package or offered by one or more service provider as independent services.

☐ I seek bids for data plans or wireless adapters (Air Cards) for mobile devices for commercial wireless service for a school or library that does not have an existing broadband internal connections.

☒ I seek bids for internet access and/or data transmission service.

☐ I seek bids for Category One network equipment or maintenance and operations.

☒ I seek bids to purchase data transmission service only (i.e., that does not include internet access service).

☐ I seek data transmission service without internet access service.

☐ I seek to lease capacity, e.g., a specific number of dark fiber strands or capacity over a leased lit network, that will be used for data transmission service.

Typically, leased lit fiber or microwave
(most common)

Leased dark fiber *(also includes leased lit fiber for comparison)*

Form 470 - Example

- Welcome changes to C2 Form 470!
 - Basic maintenance an “add on” option to equipment request
 - Licenses/software included with equipment request

Use for equipment requests
(most common)

Use if bidding maintenance
ONLY (uncommon)

Use if bidding managed
internal broadband services
(MIBS) (uncommon)

Add New Service Request

- ☐ I seek bids for the equipment needed for broadband connectivity within schools and libraries and/or the related software and right-to-use licenses necessary for the equipment to function.
- ☐ I seek bids for basic maintenance service on eligible equipment and/or support services (e.g., bug fixes, software upgrades, and security patches) appropriate to maintain reliable operation.
- ☐ I seek bids for the operation, management, and monitoring of eligible broadband internal connections.

Service Type Internal Connections	Manufacturer No Preference
Function * Routers and Necessary Software and Licenses	Are you also seeking Installation, Activation and Initial Configuration for this service? * ☐ Yes ☐ No
Quantity * 	
Unit Each	
☐ Please select this option if you would like to create an accompanying Category Two BMIC request for this IC request.	

State Procurement Rules

\$.01 - \$5,000.00	\$5,000.01 - \$75,000.00	Greater than \$75,000	+ E-rate Requirements
May purchase without advertising or otherwise requesting competitive bids	May purchase without advertisement for bids, provided at least two competitive written bids have been obtained	Advertisement & receipt of competitive bids required by law	Post Form 470 and wait 28 days before awarding

The lifecycle cost of an information technology project means the total committed costs of the project, not just the initial or up-front costs. Lifecycle cost includes all costs associated with obtaining the item and maintaining and operating it for its projected lifecycle. Initial or one-time costs might include purchase price, freight, installation, and training. Ongoing costs include such expenses as post-warranty maintenance; support, including help desk charges, upgrade charges, and on-site vendor personnel; and any recurring usage charges.

Reverse Auction / Termed Contracts

- DFA Contact
 - Ross Campbell / Danny Lynch
 - ross.campbell@dfa.ms.gov
 - danny.lynch@dfa.ms.gov
 - 601-359-2004
- Termed Contract (60 months)
 - No Reverse Auction
 - Set time frame of contract
 - Purchase off contract more than 1 time
- Reverse Auction
 - One time purchase
 - Conducted by district or by 3rd party
- Reverse Auction Exemption
 - Submit request to DFA
- Dates: <https://www.dfa.ms.gov/pprb-meetings>

Reverse Auction

- Items to be submitted to DFA
 - Newspaper Ad
 - Agency Bid Bank notification
 - Bid Specs
 - Winning bid
 - Bid Tabulation
 - If not low bid, justification needed

Contracts

- Must be loaded in EPC prior to starting Form 471
- Applicants must have a signed contract or ***other legally binding agreement*** in place prior to submitting their FCC Forms 471 to USAC.
 - Signed contract with Form 470 winning bidder
 - Vendor can sign after Form 471 deadline
- Applicant must not sign a contract before the Allowable Contract Award Date (ACD).
- Signed contracts constitute the best evidence that a legally binding agreement exists.
- A verbal offer and/or acceptance will not be considered evidence of the existence of a legally binding agreement.
- For additional information about State Master Contracts, see the USAC website.
- Types
 - One year
 - Multi-year
 - Can contain voluntary extensions
- Must be loaded in EPC in PDF format

Uploading Contract

- All new contracts must be uploaded into the EPC Contract Module before starting the Form 471
- Assign a very descriptive nickname
 - Example – FY26 CSpire Internet
- Upload copy of contract
- Enter the following information:
 - Form 470 used to bid service
 - Contract signing date
 - Number of bids
 - How many contract extensions, if any
 - Service Provider Identification Number (SPIN)
- Contract expiration date will be added to the Form 471

Contract Changes

- RFP Upload
 - Upload RFP to any non-cancelled Form 470, even if Form 470 did not originally have a RFP
- Substantial Change Question/New Layout to RFP Upload Screen
 - New Yes/No question: Does this new RFP constitute a substantial change to your FCC Form 470
- ACD Automatic Reset
 - When “Yes” is selected for substantial change question, the allowable contract date will automatically update to extend by 28 days.
 - Day of modification/new RFP is day 1, the following day is day 2. ACD on Summary screen will change to reflect new date.
- ACD Automatic Reset Validations
 - ACD cannot be reset if the FCC Form 470 is referenced on an FRN which is not cancelled. Error message will appear.
 - FCC Form 471 cannot be certified if an FRN is citing an FCC Form 470 whose ACD is in the future. Error message will appear.
 - If the offending FCC Form 470 is removed from the application, the FCC Form 471 can be certified.

Contracts – Mistakes to Avoid

- The contract contains the **applicant's signature and date** of when the contract was executed.
- The legally binding agreement contains all the material terms and conditions and contains a written acceptance of the offer.
- The contract/legally binding agreement was negotiated on or after the Allowable Contract Date on the FCC Form 471.
- The contract/legally binding agreement was negotiated/executed on or before the submission of the FCC Form 471.

Add New Contract - EPC

Records / Applicant Entities

#132 - School District 10

MANAGE CONTRACTS

Summary Customer Service Modifications Additional Information Discount Rate Category Two Budget **Contracts** FCC Forms FRN Appeals News Related Actions



Contract 5000-1 – C Spire

The primary services included under Category I include:

- Switched Ethernet and MPLS circuits
- Raw Internet
- PRIs
- SIP trunks
- Centrex Platinum
- Business Lines
- Hosted Firewall and Content Filtering
- IP Addresses

Contract 5000-2 - ATT

The primary services included under Category 2 include:

- ADI Internet – Managed or Unmanaged (Same as MIS)
- BVoIP
 - SIP Handoff
 - PRI Handoff

28-Day Waiting Period

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

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

- **When does the waiting period start?** *The day you certify your FCC Form 470 is day 1. For example, if you certify the FCC Form 470 on 1/1/2025, you may select a service provider on or after the 29th of the month. If you make changes after certifying the FCC Form 470, you may be required to restart the 28-day waiting period.*
- **Do weekends count as apart of the 28 days?** *Yes, the minimum 28-day period is based on calendar days.*
- **When can you select a vendor?** *After the 28-day waiting period (unless your FCC Form 470 lists a later bid deadline.)*
- **When's the last day you can select a vendor?** *You must select the most cost-effective service offering before you submit the FCC Form 471.*
- **When can you stop receiving bids?** *You may set a bid deadline and include it to your narrative or RFP. This deadline must be at least 28 days after certifying your FCC Form 470 or longer depending on state rules. If you **do not add a deadline to your narrative or RFP**, you must accept bids up until you evaluate bids and make a vendor selection. These deadlines should be memorialized in your records.*

Allowable Contract Date

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

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

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

Remember

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



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

¹ This may vary based on state and local procurement rules.

² You must select a vendor before the filing window closes.

Allowable Contract Date Changes

- RFP Upload
 - Allow users to upload an RFP document to any non-cancelled Form 470, even if that Form 470 did not originally have an RFP.
- Substantial Change Question/New Layout to RFP Upload Screen•
 - New Yes/No question: Does this new RFP constitute a substantial change to your FCC Form 470?

The screenshot shows a web interface for adding an RFP to an FCC Form 470. The top navigation bar includes 'News', 'Tasks (70)', 'Records', 'Reports', and 'Actions'. The main heading is 'Add an RFP to FCC Form 470' with a subtitle 'QC Smile School District - Used for Dashboard testing - Test ACD reset - Form #250000201 - Funding Year 2025'. Below this is the 'Upload RFP' section, which contains explanatory text about the 28-day waiting period and a question: 'Does this new RFP constitute a substantial change to your FCC Form 470? *'. There are radio buttons for 'Yes' and 'No'. Further down, there is a warning about the consequences of selecting 'Yes' and a section for uploading the RFP document with an 'UPLOAD' button and a 'Drop file here' prompt. At the bottom, there is a section for 'Associate RFP to Service Request(s)' with a dropdown menu and a category selection.

News Tasks (70) Records Reports Actions

Add an RFP to FCC Form 470
QC Smile School District - Used for Dashboard testing - Test ACD reset - Form #250000201 - Funding Year 2025

Upload RFP

Changes to the FCC Form 470, including uploading a new RFP document, may require applicants to restart the 28-day waiting period before selecting a service provider, signing a contract, or submitting and certifying an FCC Form 471. Ministerial or clerical errors, such as updating contact information, do not require a reset of the 28-day waiting period. However, changes that materially affect the competitive bidding process, such as changing the services or equipment being requested, do require restarting the 28-day waiting period.

If you are requesting bids for additional equipment, services, or recipients of service not included on the original FCC Form 470, you may need to file a new FCC Form 470.

Please review the [USAC.org](#) for additional guidance.

Does this new RFP constitute a substantial change to your FCC Form 470? *

☐ Yes

☐ No

If you select yes, the 28-day waiting period will reset, and the Allowable Contract Date on your FCC Form 470 will be updated accordingly. If the new Allowable Contract Date prevents you from certifying the FCC Form 471 before the application window closes, you must request a waiver from the Commission after certifying the FCC Form 471.

Uploading a new RFP document with substantial changes and not waiting the minimum 28 days may result in denial of funding.

Please add an RFP here

UPLOAD Drop file here

Associate RFP to Service Request(s)

Category 1: Data Transmission and/or Internet Access

Please select the service request(s) that apply to this RFP. (optional) Show

Allowable Contract Date Changes

- ACD Automatic Reset
 - When “Yes” is selected for substantial change question, the allowable contract date will automatically update to extend by 28 days.
 - Day of modification/new RFP is day ONE. ACD on Summary screen will change to reflect new date.
- ACD Automatic Reset Validations
 - ACD cannot be reset if the FCC Form 470 is referenced on an FRN which is not cancelled. Error message will appear.
 - Form 471 cannot be certified if an FRN is citing an FCC Form 470 whose ACD is in the future. Error message will appear.
 - If the offending FCC Form 470 is removed from the application, the app can be certified.

Waiting on Bids

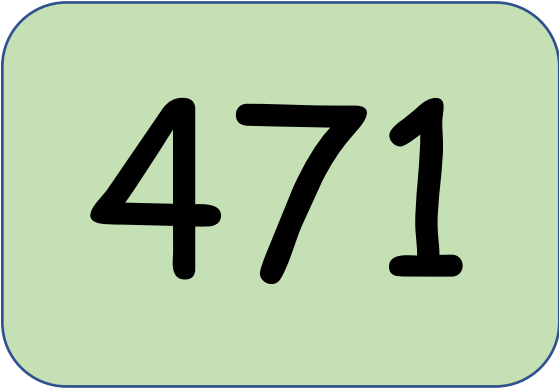
- After applicants file and certify their FCC Form 470, they must wait a minimum of 28 days before selecting a service provider.
- Use the 28-day waiting period to:
 - Receive bids.
 - Respond to service provider inquiries regarding your project.
 - Be sure that any information provided to one service provider is provided to all bidders.
- Evaluate the bids using your factors and bid evaluation matrix.

Steps after 28-Day Waiting Period

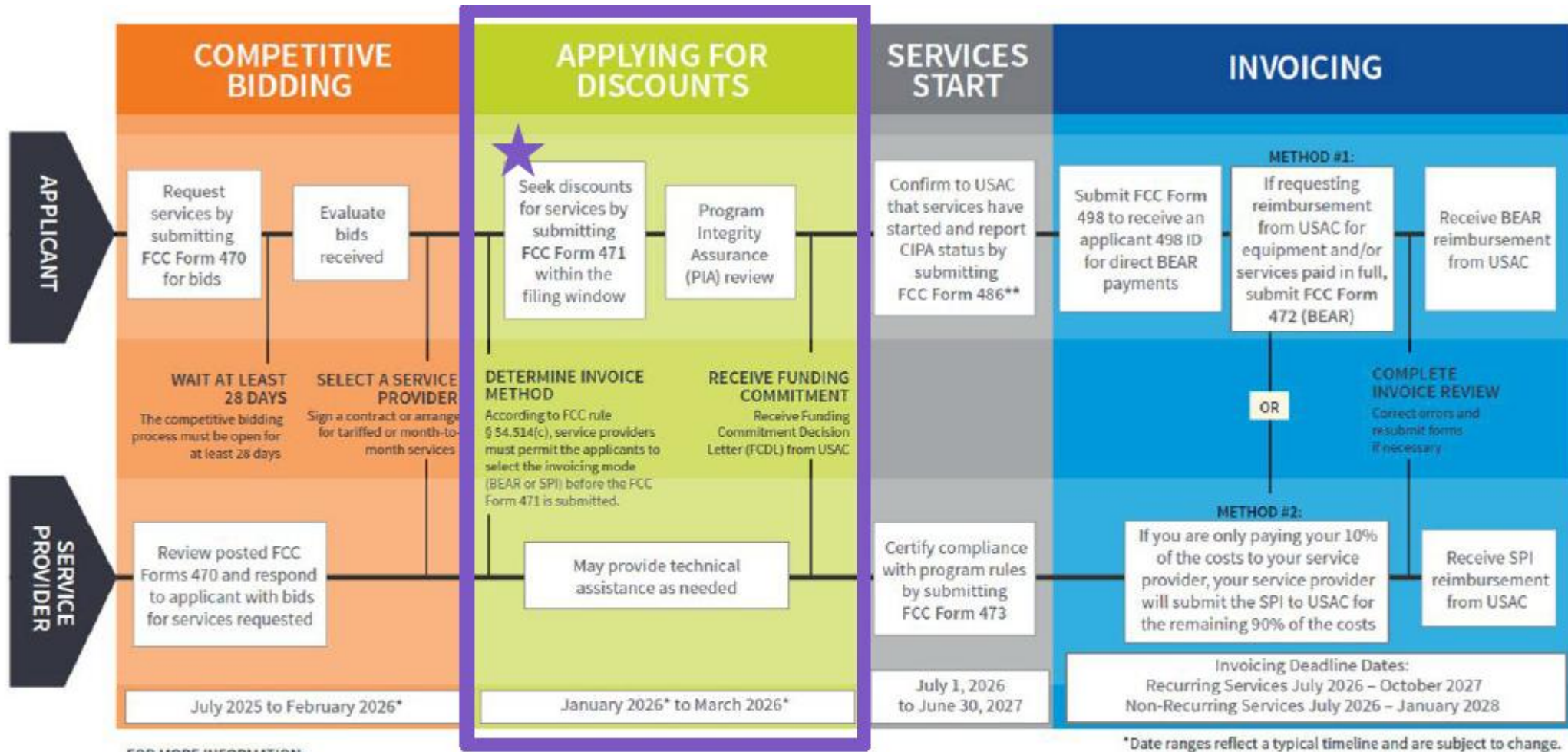


Form 471

- Guidelines
- Filing Window Discounts



471



FOR MORE INFORMATION:

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

Form 471

- Provide information about your requests (discount level, costs of services, service providers)
- Applicants must:
 - Include information on the recipients of service and service providers
 - Provide detailed descriptions of services including costs and dates of service and/or the requested equipment
 - Certify compliance with program rules.
- Verify all items on application are:
 - Included in Form 470 and competitively bid
 - 28-day rule complied with
 - Listed in the Eligible Services List
- 90% used by district entity
 - No cost allocation

Form 471 – Filing Window

- Filing Window – generally opens mid-January and closes mid-March
- FY2026 will close in mid-March.
- The filing window generally opens in mid-January and closes in mid-March in advance of the start of the funding year
- *Applications (FCC Forms 471) filed outside of the filing window are not considered for funding

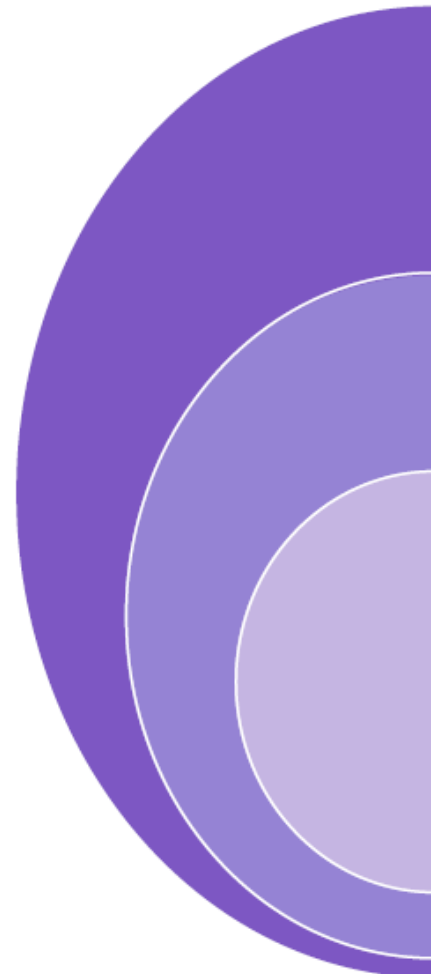
Common Form 471 Errors

- Not correctly classifying the category of service or equipment/service type on the Form 470
- Filing inaccurate Funding Request Number (FRN) with the wrong equipment or service type
- Failing to remove ineligible services and equipment

Eligible Software Category

- Software can fall into two service types
- Commitments for different types of software can be for different term lengths.
 - Right to Use Licenses Purchased with Internal Connections – **All years** of the license contract can be billed in a single funding year.
 - For a 3-year contract for 100% eligible licenses at a pre-discounted amount of \$12,000, the full amount of \$12,000 could be entered into a single funding request number (FRN) for that funding year.
- Software updates are considered basic maintenance of internal connections (BMIC) – Only the **current year** of service can be included in a single funding year, and multi-year software contract amounts must be prorated.
 - For a 3-year contract for 100% eligible BMIC services at a total pre-discounted amount of \$12,000, the FRN could only reflect a single year of expenses, or \$4,000, in a **single funding year**. BMIC services can only be invoiced after they are actually provided/performed.

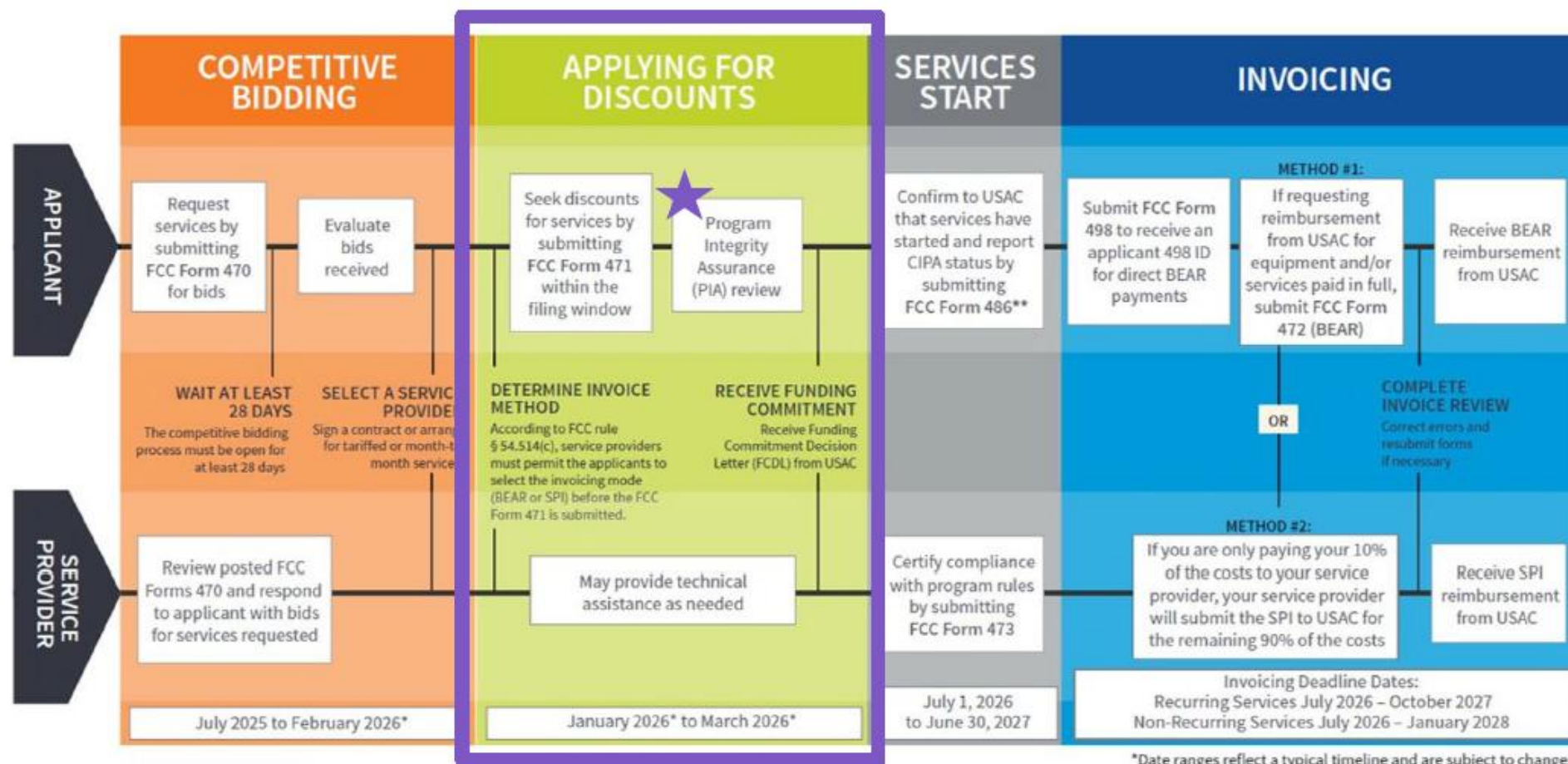
Relationship between Unique Numbers



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

Program Integrity Assurance Review (PIA)

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



Before PIA Review

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

Funding Commitment Decision Letter

- After the program integrity assurance review process has been completed, USAC issues a Funding Commitment Decision Letter (FCDL) containing USAC's decisions on your funding requests.
- You can find this decision in the Newsfeed in your organization's EPC account.
- You should review this decision carefully, as it contains important information both for planning to start services and for completing the additional steps in the application process.
- If you disagree with one or more of the decisions in your FCDL, you can appeal to USAC.

Form 486



486

- Guidelines
- Start Date
- Filing Form 486

Form 486 - Continued

- Applicants file the FCC Form 486 to:
 - Notify USAC that **services have started** for the Funding Request Numbers (FRNs) listed on the FCC Form 471.
 - Report the status of compliance of the entities on those FRNs with the **Children's Internet Protection Act (CIPA)**.

Form 486 Service Start Date

- What is my Service Start Date (SSD)?
 - The first day of the funding year if services start on or before July 1..
 - Any day after July 1, but before June 30 of the funding year that services were actually started.
- For installations that started on May 25 before the funding year, the SSD is July 1 of the funding year.
- For services starting August 7 of the funding year, the SSD is August 7 of the funding year.
- The FCC Form 486 **MUST** be certified no later than 120 days after the **Service Start Date reported on the FCC Form 486** or 120 days after the date of the **Funding Commitment Decision Letter (FCDL)**, whichever is later.

FCC Form 486 Notification Letter

Lee Bray
MISSISSIPPI DEPARTMENT OF EDUCATION
359 NORTH WEST STREET SUITE 118
JACKSON, MS 39201

7/11/2022

FUNDING YEAR 2022: 7/1/2022 - 6/30/2023
FCC Form 486 Application Number: 279840
Applicant's FCC Form 486 Nickname: CSpire Circuits FY22

This letter is to notify you that the Universal Service Administrative Company (USAC) has received and accepted a certified FCC Form 486, Receipt of Service Confirmation Form, from you. Information about your commitment may have changed. Please review the [FCC Form 486 Notification Letter Report](#) to confirm the information you provided. This information is also being shared with the service provider(s) identified on each Funding Request Number (FRN).

If you need assistance, contact our Client Service Bureau toll-free at (888) 203-8100, or submit a customer service case in the E-rate Productivity Center (EPC) by selecting "[Contact Us](#)" from the menu in the top right corner of your landing page.

Next steps

Discuss with your service provider whether you would like discounts on your bills or to pay your bills in full and be reimbursed for discounts.

- Applicants invoice USAC before the invoice deadline using the applicant invoice method [FCC Form 472, Billed Entity Applicant Reimbursement (BEAR) Form] for reimbursements of discounts after paying the service provider bills in full.

Child Internet Protection Act - CIPA

- Guideline
- Internet Safety Policy
- Technology Protection Measure (Filter)
- Public Notice and Hearing or Meeting
- Documentation

CIPA

- Requires that schools and libraries enforce certain safety measures that protect against access by adults and minors to obscene content on the internet.
- Three requirements include:
 - Internet Safety Policy
 - Technology Protection Measure
 - Public Notice and Hearing or Meeting
- The school or library must maintain documentation demonstrating that they are working toward compliance (in the first year) or in compliance (second year and thereafter).

CIPA – Internet Safety Policy

The Internet Safety Policy (ISP) must address:

- Access by minors to inappropriate matter on the internet and World Wide Web
 - The safety and security of minors when using electronic mail, chat rooms, and other forms of direct electronic communications;
 - Unauthorized access including "hacking" and other unlawful activities by minors online;
 - Unauthorized disclosure, use, and dissemination of personal information regarding minors; and
- Measures designed to restrict minors' access to materials harmful to minors.

Additional requirements for schools:

- Must also include monitoring the online activities of minors.
- Must provide for educating minors about appropriate online behavior, including interacting with other individuals on social networking websites and in chat rooms, cyberbullying awareness, and response.

CIPA – Technology Protection Filter

- A technology protection measure is a specific technology that blocks or filters internet access.
 - Entities must enforce the operation of the technology protection measure during the use of its computers with internet access.
 - A person authorized by the authority with responsibility for administration of the school or library may disable the technology protection measure during use by an adult to enable access for bona fide research or other lawful purpose.
- Decisions about what matter is inappropriate for minors are made by the local community (school board, local educational agency, library, or other authority).

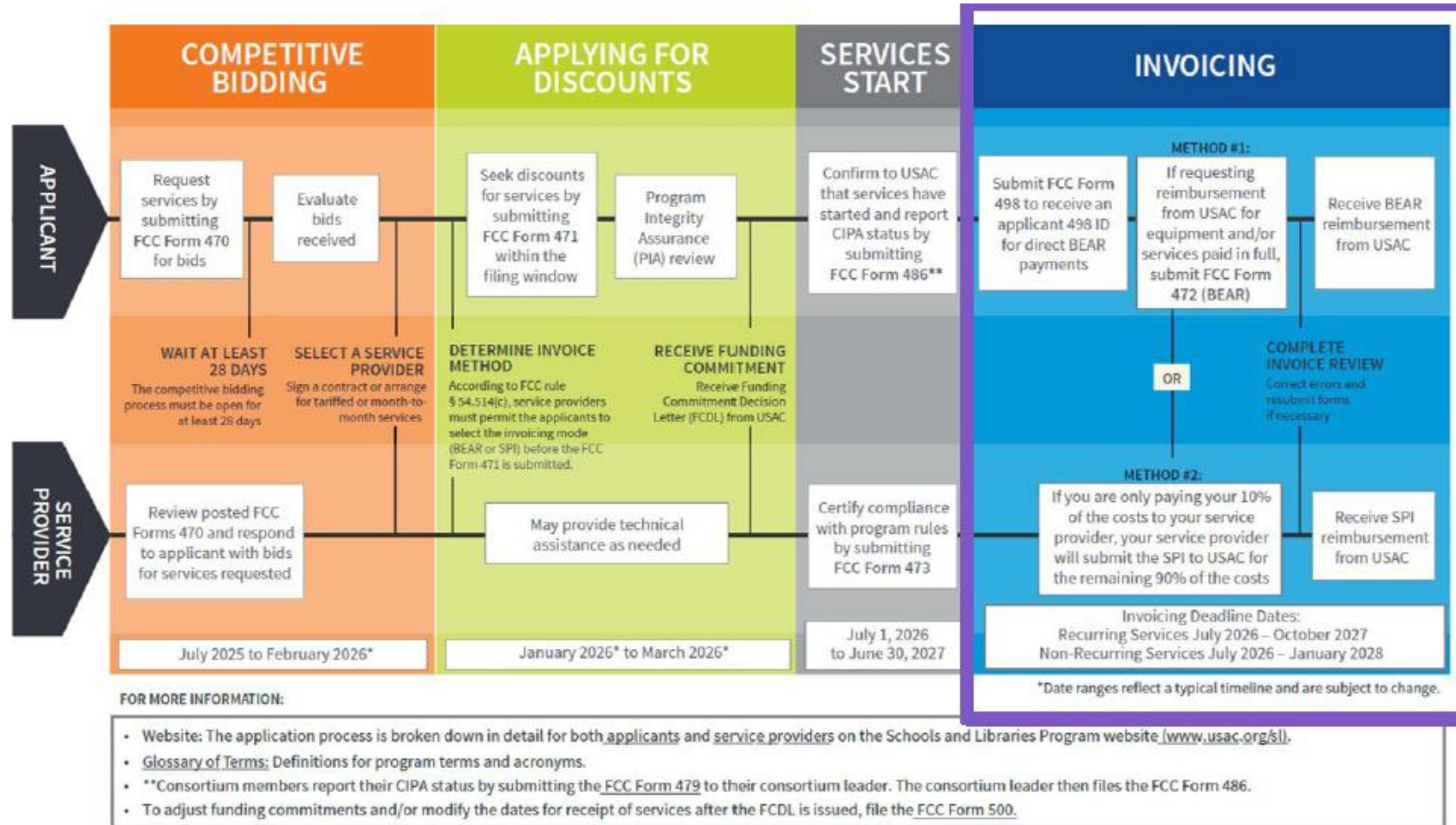
CIPA – Public Notice & Hearing / Meeting

- You must provide **public notice** and hold at least **one public hearing or meeting** to address the internet safety policy.
- For private schools, public notice means notice to your constituent group.
- Additional meetings are not necessary– even if the policy is amended – unless those meetings are required by state or local rules or the policy itself.
- Document meeting

Equipment Transfer and Labeling

- Label equipment and record asset with purchase year
 - Make/model/serial #/building/room/FRN/date installed
 - Update list when equipment is moved
 - Asset inventory kept for 10 years from date of purchase
- Equipment transfer
 - Between eligible schools for first 5 years
 - Do not have to notify USAC
 - Update internal inventory list when move occurs
 - After 5 years, items can be disposed of, sold, transferred, etc. or moved to a NIF.

Invoicing

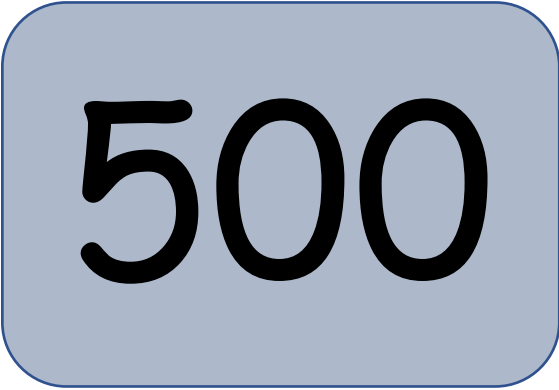


Form 498

498

- List all banking process information
- Is it up to date?
 - Current Bank Account
 - Current Bank Routing Number
- Have you checked it lately??
- Will require Sam.gov UEI if changes are made
- <https://www.usac.org/e-rate/applicant-process/invoicing/obtain-an-applicant-498-id/>

Form 500



500

- Adjusting Approved Funding
- When to file
- <https://www.usac.org/e-rate/applicant-process/before-youre-done/fcc-form-500-filing/>

Form 500 – Adjusting Approved Funding

- Requests specific changes to your funding commitments after USAC issues your FCDL, such as:
 - Extending the contract expiration date listed on FCC Form 471.
 - Changing the service start date listed on FCC Form 486.
 - Cancellation or reduction of a Funding Request Number (FRN).
 - Requesting an extension of the deadline for delivery of non-recurring services.
- FCC Form 500 for Category Two funding reductions
 - If you do not use all of the Category Two funding commitment, you can submit FCC Form 500 to return funds committed but not invoiced to your five-year Category Two budget.
- FCC Form 500 for FY2016 and forward:
 - File and certify in EPC.
- NOTE: If you do not use all of a Category Two funding commitment, file an FCC Form 500 to return committed funds and attach a spreadsheet with a detailed allocation for all of your affected entities.

Form 472 - BEAR



472

- Applicant Reimbursement
- Filed in EPC
- Filed at applicant determined intervals
- <https://www.usac.org/e-rate/applicant-process/invoicing/fcc-form-472-filing/>

BEAR / SAM.GOV

- EPC E-Rate Invoice
- Waffle Icon – EPC Invoice
- Sam.gov
 - Renewed annually
 - UEI will be required in EPC
 - Replacing DUNS

BEAR Permissions

- No USAC request needed
- BEAR permission located on User Permission page
- If user already had BEAR permission – credentials should have moved into EPC access
- If not, AA will have to add BEAR permission

Invoicing Dashboard

Invoicing Dashboard

Good Morning, Welcome to E-Rate!
Althea Smith

My Organization | **My Forms and Requests** | My Pending Tasks | My Pending Inquiries

Application Type: FCC Form 472

Search: Search FCC Forms 472 | APPLICATION STATUS: Certified

BEN	BEN Name	FCC Form 472 Number	FCC Form 472 Nickname	FCC Form 472 Status	Certified By	Certified On
12345	PUBLIC SCHOOL 1	BEAR202211111	School1internet	Certified	Jane Doe	11/15/2022 12:49 PM EST
12345	PUBLIC SCHOOL 1	BEAR202222222	School C2	Certified	Jane Doe	11/10/2022 12:49 PM EST
12345	PUBLIC SCHOOL 1	RFAR202233333	internet1	Certified	Jane Doe	8/10/2022 12:49 PM EST
12345	PUBLIC SCHOOL	BEAR202233333	internet2	Certified	Jane Doe	8/10/2022 12:49 PM EST

4 items

Invoice Line Items

Invoice Line Item	Funding Request Number	Discount Amount Billed to USAC	Invoice Line Status
20000541	2299058985	\$18.40	Certified
20000542	2299058983	\$16.80	Certified

Audit & Assurance Division Overview

PQA	SCAP	BCAP
Determines improper payment rates for USF programs	Assesses compliance with FCC Rules as it relates to national security threats to the communications supply chain	Assesses compliance with FCC Rules for USF programs
Evaluates the accuracy of data submitted for USF purposes and USAC's internal disbursement processes (a high-level review)	Evaluates whether program participants have used USF funds and federal subsidies to purchase any equipment or services provided or manufactured by Covered Companies.	Evaluates the accuracy of data submitted for USF purposes (a detailed review)
Identifies overpayments that must be recaptured	Identifies, in consultation with the FCC, what corrective action is appropriate	Identifies correct contribution obligations (for contributor audits)/overpayments that must be recaptured (for beneficiary audits)
Prompts other corrective actions to decrease improper payment rates	Initiates other corrective actions to increase compliance	Initiates other corrective actions to increase compliance
Deters waste, fraud and abuse		
Identifies FCC Rules that may require the attention of USAC or FCC management		

E-Rate Audits

- **3 Types**

- **Pre-Commitment Audit – Selective Review**

- Often a competitive bidding review
 - Requires all winning/losing bids, vendor correspondence, bid evaluation
 - Completed by separate team outside of PIA review
 - If you pass SR, then application goes to PIA review

- **PQA Assessment Audit**

- Random FRNs selected among disbursements for certain “window”
 - Requires nearly all same documentation to be submitted as larger BCAP audit but for a FRN, not all FRNs in a funding year
 - ~350 per year
 - Used to determine ‘Improper Payment Rate’ for entire E-Rate program

- **BCAP Audit**

- Large audit of all FRNs in a funding year

Audit / Assessment Duration

- PQA Assessment – 3 months*
- SCAP Audit – 8 months*
- BCAP Audit – 9 months*

*Note: The above audit/assessment durations are estimates. The length of an audit/assessment depends on many factors, including the timeliness of providing documentation to AAD, complexity of documentation being reviewed, and audit issues encountered.

Invoice Decision Codes

- USAC processes the invoice request and issues its [invoicing decision](#).
- When the invoice mode is BEAR, the applicant and the service provider receive a copy of the FCC Form 472 BEAR Notification Letter.
- Service providers will receive a remittance statement after filing a SPI Form.
- Invoice Decision Codes explain the reason for any modifications or denials.
- Invoice information is also available in Open Data.
- For more details on a particular invoice, contact the USAC Customer Service Center.



Universal Service
Administrative Co.

Available for Public Use

Decision Code	Plain Language Decision Explanation	Historical Decision Explanation (Letters issued before October 1, 2020)
40	Either a Customer Billed Date or a Shipping Date to Customer must be entered on this invoice line.	Either Billed Date or Shipped Date must be entered.
41	Either a Customer Billed Date or a Shipping Date to Customer, but not both, must be entered on this invoice line.	Both Bill and Ship Date cannot be entered
42	The Total (Undiscounted) Amount was not provided on the invoice line.	Total (Undiscounted) Amount for Service per FRN (Not Provided)
44	The Discount Amount Billed to SLC was not provided on the invoice line.	Discount Amount Billed to SLC (Null or Zero)
48	The undiscounted amount multiplied by the discount percentage for this FRN is lower than the requested invoice amount.	Discount Amt. Billed Not Valid
60	The service provider has not certified an FCC Form 473 for the funding year.	Service provider must be certified
67	The Shipping Date to Customer is after the Contract Expiration Date or the Service End Date (whichever is earlier).	Ship Date > [%s] days (486) Early Term Dt
68	The Shipping Date to Customer is after the Contract Expiration Date or the Service End Date (whichever is earlier).	Ship Date> [%s] days 471 Term or Cnt Ext
75	The Customer Billed Date entered on the invoice line is outside of the funding year for this FRN.	Billed Date after [%s] fund yr;one time cost
76	The Customer Billed Date entered on the invoice line is outside of the funding year for this FRN.	Billed Date after [%s] fund yr;mnthly cost
77	The Shipping Date to Customer entered on the invoice line is outside of the funding year for this FRN.	Shipped Date after [%s] fund yr;one time cost
78	The Shipping Date to Customer entered on the invoice line is outside of the funding year for this FRN.	Shipped Date after [%s] fund yr;mnthly cost
80	This invoice was submitted after the invoicing deadline for the FRN.	Invoice Received Date is later than Invoice Received Extension Date for FRN
81	The Customer Billed Date entered on the invoice line is after the Invoice Deadline Date.	Bill Date [%s] > [%s] Billed Extension Date; one time cost



MISSISSIPPI
DEPARTMENT OF
EDUCATION

Invoicing Appeals

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

Documentation

- Ensure adequate documentation is retained for 10 years to:
- Support amounts invoiced to the E-Rate program
- Demonstrate compliance with FCC rules
- Demonstrate that the costs of equipment and services requested for E-Rate support were properly allocated between eligible and ineligible items, locations or recipients of service
- Detailed Document Retention requirements are available on USAC's website.

Documentation

- Maintain a reconciliation worksheet that includes:
 - Service provider bill number
 - Billed service/product
 - Quantity and per unit cost
 - Extended billed amount
- Ensure:
 - Sum of all the extended bill amounts agrees to the total (undiscounted).
 - Amount for equipment or service requested on the BEAR form can be traced to the actual copies of the service provider bills.

Document Retention

- **Applicants and service providers** are required to retain documentation that demonstrates compliance with the statutory or regulatory requirements for all E-Rate program purchases of equipment and services **for a period of at least 10 years** after the last day of the applicable funding year or the service delivery deadline for the funding request.
- Winning **service providers** must retain records related to the purchase and delivery of E-Rate eligible equipment, signed and executed contracts, bidding information, invoices, provision of services, and other matters relating to equipment and services.
- For example, for **recurring internet access service** for FY2026, both the **applicant and the service provider** must retain all records until **at least** June 30, 2036.

Document Retention

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

<https://www.usac.org/wp-content/uploads/e-rate/documents/resources/e-rate-program-list-of-documents-to-retain.pdf>

Questions???



The Portal



E-Rate Productivity Center (EPC)

- Account Administrator Updates
- Account Administrator Roles
- Create User
- Student Counts
- Parent / Child Changes
- Profile Changes
- C2 Budget Section
- Examples

Account Administrators

- Every parent organization (independent school, independent library, school district, library system, consortium) in EPC needs an account administrator.
 - Consultants and service providers also need account administrators for their EPC accounts.
 - **Account administrators can:**
 - Create new users.
 - Modify the rights of existing users.
 - Modify information about their organization.
 - Link or unlink their organization to consulting firms and consortia.
 - Modify (change) the account administrator.

Managing Users

- From your landing page, choose **Manage Users**.

My Applicant Landing Page



Portal-UAT

**Universal Service
Administrative Co.**

Welcome, Library System 13001!

Pending Inquiries

Type

-- Select a Type --

Funding Year

-- Select a Funding Year --

Application/Request

-- Enter an Application/Request ID or Nickname --

[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#) |
[Appeal](#) | [IDD Extension](#) | [FCC Form 500](#) | [SPIN Change](#) | [Service](#)
[Substitution](#) | **[Manage Users](#)** | [Manage Organizations](#) | [USAC Website](#) |
[Contact Us](#) | [Help](#)

User Permissions

Document1 - Word

File Home Insert Design Layout References Mailings Review View Developer Acrobat Tell me what you want to do...

Catherine W

#11111 - ABC SCHOOL DISTRICT

Summary Customer Service Modifications Additional Information Discount Rate Category Two Budget Contracts FCC Forms FRN Appeals News **Related Actions**

Manage User Permissions

Organization Details

Name	ABC SCHOOL DISTRICT	FCC Registration Number	11111
Address	123 Main Street SPRINGFIELD, NY 11111 New York	Organization Type	Applicant
Mailing Address	123 Main Street SPRINGFIELD, NY 11111 New York	Phone Number	111-111-1111
		Email	

User Permissions

In the table below, you can designate the permissions that you wish to give to each of your users for the various tasks you can complete in the portal. This table will continue to grow as more functionality comes online.

- Full rights users can start, complete, submit and certify forms.
- Partial rights users can start and enter data in the form, but cannot submit and certify them.
- View Only users can only see forms created by other people in your organization but cannot create forms themselves.
- Form 498 School or Library Officials can start, complete, submit, certify, modify, and deactivate Forms 498.
- Form 498 General Financial Contacts can start, complete, and submit Forms 498, but cannot certify new or updated Forms 498 or deactivate existing Forms 498.
- Post-Commitment Full and Partial rights user can start, complete, and submit Spin Change and Service Substitution requests. Post-Commitment View Only rights can view the submitted Spin Change and Service Substitution requests.

Name	Email	Apply All	470 Permission	471 Permission	472 Permission	498 Permission	Post-Commitment Permission	486 Permission	Appeals Permission
Althea Smith	asmith@ABCschooldistrict.net	▼	Full ▼	Full ▼	Full ▼	School or Library Official ▼	Full ▼	Full ▼	Full ▼
ROBERT SMITH	rob@ABCschooldistrict.net	▼	Full ▼	Full ▼	Full ▼	No Access ▼	Full ▼	Full ▼	Full ▼

CANCEL **SUBMIT**

Entity Profile Changes

- Parent and child entity attributes section now consistently labeled **Applicant Information**
- Layout improved for readability
- **C2 Budget Information** for both schools and libraries
- Student counts for school districts
 - Entered separately for discounts and C2 budgets
 - School districts can enter one number on the school district profile for C2 budget purposes.

Parent Update Information

- From the landing page, click the parent entity name, either from the Welcome message at the top of the page or the first entry in the **My Entities** section.

My Applicant Landing Page

Training
**Universal Service
Administrative Co.**

Welcome, School District 400100!

Pending Inquiries

Type: -- Select a Type --
Application/Request: -- Enter an Application/Request ID or Nickname --
Funding Year: -- Select a Funding Year --

APPLY FILTERS CLEAR FILTERS

Pending COMAD Inquiries are not included.

Application/Request Number	Type	Nickname	Inquiry Name	Outreach Type	Date Sent	Due Date	Extn.	Status
No items available								

Notifications

Notification Type: Please select a value
Funding Year: -- Select a Funding Year --
Status: ☒ All
☐ Generated
☐ Not Generated

Notification	Description	Issued Date	Generated By	Generated On
No items available				

My Entities

Entity	Entity Number	City	State	Zip Code
School District 400100	17308	Washington	DC	20005
School 1 in District 400100	18006	DC	DC	20005
School 2 in District 400100	18007	DC	DC	20005
School 3 in District 400100	18008	DC	DC	20005

Parent Entity Profile

- You can then update many of the fields in the organization's entity profile.

Records / Applicant Entities
#17308 - School District 400100

Summary Customer Service Modifications Additional Information Discount Rate Contracts FCC Forms FRN Appeals News **Related Actions**

Modify An Organization

Name * School District 400100	Organization Type Applicant
Physical Address	
Address Line 1 * 700 12th St NW #900	Zip Code * 20005
Address Line 2 	Zip Code Extension
City * Washington	County * Please select a County
State * DC	Please ensure that the address, city, state, and zip code are correct

Child Entity Profile

- From the landing page's **My Entities** section, click the child entity name.

My Applicant Landing Page

 **Training**
Universal Service Administrative Co.

Welcome, [School District 400100!](#)

[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#) | [Appeal](#) | [IDO Extension](#) | [FCC Form 500](#) | [SPIN Change](#) | [Service Substitution](#) | [Manage Organizations](#) | [USAC Website](#) | [Contact Us](#) | [Help](#)

Pending Inquiries

Type: Application/Request:

Funding Year:

[APPLY FILTERS](#) [CLEAR FILTERS](#)

Pending COMAD inquiries are not included.

Application/Request Number	Type	Nickname	Inquiry Name	Outreach Type	Date Sent	Due Date	Extn.	Status
No items available								

Notifications

Notification Type: Status: ☒ All ☐ Generated ☐ Not Generated

Funding Year:

Notification	Description	Issued Date	Generated By	Generated On
No items available				

My Entities

Entity	Entity Number	City	State	Zip Code
School District 400100	17308	Washington	DC	20005
School 1 in District 400100	18006	DC	DC	20005
School 2 in District 400100	18007	DC	DC	20005
School 3 in District 400100	18008	DC	DC	20005

Child Entity Profile

- From the child entity profile, click **MANAGE ORGANIZATION**.
- You can then update the child entity in the same way you updated the parent entity.

Records / Applicant Entities

#18006 - School 1 In District 400100

[Summary](#) [Additional Information](#) [Category Two Budget](#) [Contracts](#) [FCC Forms](#) [News](#) [Related Actions](#)

[MANAGE ORGANIZATION](#)

Organization Details

Name	School 1 In District 400100	Applicant Type	School
Entity Number	18006	Status	Active
FCC Registration Number	0123456789		

Contact Information

Physical Address	700 12th St NW #900 DC, DC 20005 District Of Columbia	Phone Number	123-456-7890
Mailing Address	700 12th St NW #900 DC, DC 20005 District Of Columbia	Email	s1_in_sd_400100@testmail.usac.org
		Website URL	

Applicant Attributes

Latitude	Not Found	User-Entered Latitude	
Longitude	Not Found	User-Entered Longitude	
Urban/Rural Status	Not Found	User-Entered Urban/Rural Status	Rural
School Sub-Type	☒ Public School ☐ Private School ☐ Pre-K	Community	No

Gift Rules

Gift Rules

- Receipt or solicitation of gifts by applicants from service providers (and vice versa) is a competitive bidding violation.
- Service providers may not offer or provide any gifts or thing of value to applicant personnel involved in E-Rate.
- Gift prohibitions are always applicable – not just during the competitive bidding process.
- Exceptions for gifts – limited to items worth \$20 or less, including meals or prizes, and cannot exceed \$50 from one service provider to each individual per funding year.
- Watch our Gift Rules video for more details on the gift rules.

Gift Rules

Gift Rule Prohibitions

- Gift prohibitions are applicable year-round, not just during the competitive bidding process
- Prohibition including soliciting and receiving any gift or thing of value from an applicant or a service provider participating in or seeking to participate in the E-Rate.
- Service providers may not offer or provide any gifts to applicant personnel involved in the E-Rate or vice versa.

Gift Rules

Gift Rule Exceptions Examples

- “Modest refreshments not offered as part of a meal, items with little intrinsic value intended for presentation, and items worth \$20 or less, including meals, may be offered or provided , and accepted by any individuals or entities subject to this rule, if the value of these items received by any individual does not exceed \$50 from one service provider per funding year.” See 47 C.F.R. § 54.503(d)(1).
- Single source =
all employees, officers, representatives, agents, contractors, or directors of the service provider.

Gift Rules - Examples

- A Service Provider has offered a school district employee lunch at a local sandwich shop three times during the course of the year. The value of the school district employee's meal is \$9 each time. The total value of the gifts is \$27. No other gifts are received by this employee from this provider.

Gift Rules - Examples

- A Service Provider has offered a school district employee lunch at a local sandwich shop three times during the course of the year. The value of the school district employee's meal is \$9 each time. The total value of the gifts is \$27. No other gifts are received by this employee from this provider.
- **OK** - The meals fall in the \$20 per instance and \$50 per year exception and there is no rule violation.

Gift Rules - Examples

- A school employee and his spouse are invited by a service provider to attend a play and tickets have a face value of \$30 each. The aggregate market value of the gifts offered on this single occasion is \$60.

Gift Rules - Examples

- A school employee and his spouse are invited by a service provider to attend a play, tickets to which have a face value of \$30 each. The aggregate market value of the gifts offered on this single occasion is \$60.
- **Not ok** – The tickets are \$40 more than the \$20 limit. The employee may not accept the gift of the evening of entertainment. He and his spouse may attend the play only if he pays the full \$60 value of the two tickets.

Gift Rules - Examples

- A service provider's spouse is the town librarian. The service provider takes the librarian to dinner at the cost of \$40 and gives them a \$100 gift.

Gift Rules

- A service provider's spouse is the town librarian. The service provider takes the librarian to dinner at the cost of \$40 and gives them a \$100 gift.
- **OK** - The service provider may give the librarian a birthday gift exceeding \$20 as long as it is not reimbursed by the company and is being given based on their personal relationship.

Gift Rules

- Three service provider employees invite a tech director to join them at a golf tournament at their company's expense. The entry fee is \$500 per foursome.

Gift Rules

- Three service provider employees invite a tech director to join them at a golf tournament at their company's expense. The entry fee is \$500 per foursome.
- **Not OK** - The tech director cannot accept the gift even though he has an amicable relationship with the service provider employees. Since the fees are paid by the company, it is the business relationship, not the personal relationship and there may be business motivation behind the gift.

Gift Rules – Charitable Donations

- Gift rules are not intended to discourage charitable donations as long as the donations:
 - Are not directly or indirectly related to E-Rate procurement activities or decisions, and
 - Are not given with the intention of circumventing competitive bidding or other FCC rules

Charitable Donations

- Gifts solicited or accepted indirectly
- “A gift which is solicited or accepted indirectly includes a gift: (1) Given with the employee’s knowledge and acquiescence to his parent, sibling, spouse, child, or dependent relative because of that person’s relationship to the employee, or (2) Given to any other person, including any charitable organization, on the basis of designation, recommendation, or other specification by the employee except as permitted for the disposition of perishable items or payments made to charitable organizations in lieu of honoraria.” See 5 C.F.R. § 2635.203(f).

Charitable Donations

- Gifts solicited or accepted indirectly
- Donations made indirectly through a third party, such as a non-profit, would be prohibited if the organization is used as a shell to disguise a directed gift.
 - A service provider directing its foundation to provide a cash donation equal to the value of the applicant's non-discount share is a prohibited donation.
- Service provider cannot direct the donation and must relinquish control of the gift once provided to a non-profit.

Gift Rules – Charitable Donations

- Allowable Charitable Donations
- Paid-for-exchange services at market rates, such as the purchase of advertising space, is neither a gift nor a charitable donation as long as it is not intended to influence the competitive bidding process.
 - For example, service providers purchasing advertising space on the high school football score board, for which they pay market rates, would not cause any violations.

Charitable Donations

- Potentially Allowable Charitable Contributions
- Cash, equipment, including sporting, musical or playground equipment, *may* be permissible if they benefit the school or library as a whole and broadly serve an educational purpose.
 - For example, a donation of books for a literacy campaign, given to a school by an E-Rate service provider, would be acceptable donation that benefits the school and broadly serves an educational purpose.

Charitable Donations

- Gifts solicited or accepted indirectly
- Example:
 - An employee must decline a gift of a personal computer pursuant to this rule and may not suggest that the gift be given instead to one of five charitable organizations, whose names are provided by the employee.
 - A service provider cannot donate computers to raffle with the caveat that they go to E-Rate recipients, or specific individuals or schools, or a subset of schools and libraries.

Charitable Donations

- Not Allowable
- Donations given for the purpose of influencing the competitive bidding process are rule violations.
 - Donations could either be directly from the service provider or solicited or accepted indirectly through a non-profit organization.

Charitable Donations

- Unallowable Charitable Contributions
- Service providers cannot offer special equipment discounts or equipment with service arrangements to E-Rate recipients that are not currently available to some other class of subscribers or segment of the public.
 - Free phone/tablet with purchase of service contract must be available to non-E-Rate customers as well
- Donations to cover the applicant's non-discount share

Charitable Donations

- Unallowable Charitable Contributions
- Equipment for a specific individual or group of individuals associated with or employed by an E-Rate participant.
 - Service provider may not give a gift to a teacher who helps draft a district's RFP for E-Rate eligible equipment, even if that teacher does not ultimately help select the E-Rate service provider.

Gifts – Conferences & Training Sessions

- Prizes
- Raffle tickets, prizes, or door prizes that have a retail value of over \$20 violate the gift rules unless the event is open to the public.
 - “Open to the Public” means the event is free of charge and that members of the public at large typically attend such a gathering.
 - State Fair would qualify
 - State District IT Directors meeting would not qualify

Gifts – Conferences & Training Sessions

- Widely Attend Gatherings
- “Widely attended gatherings” allow for free attendance and meals or refreshments at that event. See 5 C.F.R. § 2635.203(g)
 - Gathering is widely attended if:
 - Employee’s attendance must be in the interest of the agency (i.e. school or library) and further its programs and operations, and
 - It is expected that a large number of persons will attend, and
 - Persons with a diversity of views or interests will be present.

Gifts – Conferences & Training Sessions

- Conferences – Permissible Actions
- Food, refreshments, instruction and documents given to all attendees at Widely Attended Gatherings are permissible.
- Trainings offered by state, regional or local government bodies or non-profits or trade associations that include those bodies are not considered vendor promotional training
 - Vendor promotional training means training provided by any person for the purpose of promoting its products or services. See 5 C.F.R. § 2635.203(g)

Gifts – Conferences & Training Sessions

- Conferences – Permissible Actions
- Service providers can host, sponsor, or conduct E-rate training, as long as they do not provide any gift that exceeds the gift exceptions
 - Service providers cannot help with preparation or completion of forms, or determining the services listed on the FCC Form 470 and/or RFP.

Gifts – Conferences & Training Sessions

- Conferences – Impermissible Actions
- Training or conference regarding one or few vendors services would not meet the definition of a Widely Attended Event even if many people attended.
 - Travel expenses, lodging, meals, and entertainment associated with the event would be considered gifts and therefore violations.
 - Free attendance when it would otherwise cost to attend is also a violation.
- Meals at a Widely Attended Gatherings not provided to all attendees would be subject to gift limits

Gifts – Conferences & Training Sessions

- Conferences – Registration Fees
- Service providers can offer an “educational discount” on the attendance fee to a Widely Attended Event as long as it is available to **all** employees of schools and libraries.
- Applicants cannot accept free attendance, paid by a service provider, even if the school or library has assigned the employee to attend the event.
- A Service provider cannot pay for or reimburse expenses for an applicant to speak at a conference on behalf of that service provider, or in any other setting, e.g. newspaper or magazine.

Links

- Mississippi E-Rate Page – <https://www.mdek12.org/OTSS/e-rate>
- E-Rate Central - <https://e-ratecentral.com/>

USAC Information

- Website – <http://usac.org/sl>
- EPC Portal – <https://forms.universalservice.org/portal/login>
- Client Service Center (CSC) – 1-888-203-8100

Questions???



Where to Go For Help

State E-Rate Coordinator

- Lee Bray – 601-359-5544 / lbray@mdek12.org

Client Service Center

- Call – 1-888-203-8100
- They are extremely knowledgeable and can see the “backend”

USAC’s EPC Website: www.usac.org/sl

- Contains FAQs
- User Guides
- Video Tutorials