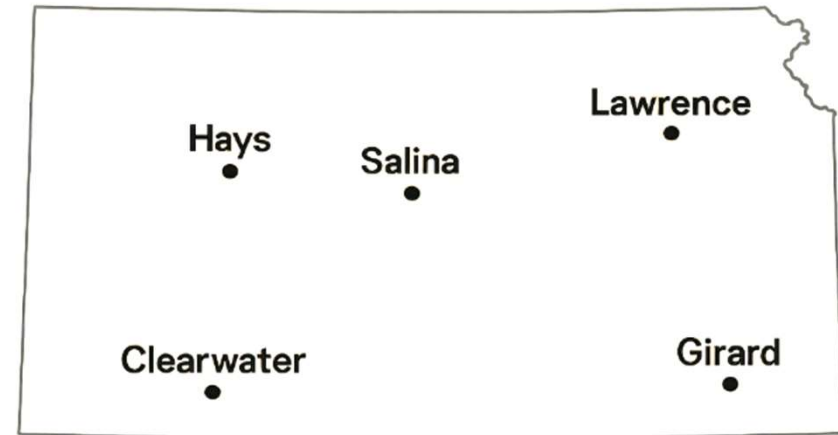


E-Rate 2026 for Kansas Schools



Don Dietrich, Lori Thompson, Valerie Thompson

BTU Consultants, LLC

(Includes content from [USAC Training September 2025](#))



E-Rate 2026 Agenda

8:30am – 10:15am

- E-Rate News, Refresh & Updates

 - Websites and Resources

 - Your E-Rate History and Open Data

- Preparing for E-Rate

 - Changes for 2026 Application

 - CIPA, Cat2 Budgets, Categories, Eligible Items & Locations

- Applying for E-Rate & Competitive Process

 - Forms 470, 471 – FRN Line-Item Details

BREAK

10:30am – 12:30pm

- E-Rate Approval and Acceptance Process

 - PIA Review, Forms 486 & Form 500

 - Form 498, BEARs and Discounts

 - USAC Open Data downloads

 - Record Keeping and Change Control

 - Appeals & Audits

What's New for 2026?

June 27, 2025



Supreme Court Decision Preserves E-rate Funding

On June 27, 2025, the U.S. Supreme Court issued its decision in *Federal Communications Commission v. Consumers' Research*, a closely watched case concerning the constitutionality of the Universal Service Fund (USF) and the FCC's authority to administer it through contributions from telecommunications providers.

The Court, in a 6-3 vote, upheld the FCC's authority to collect and distribute USF contributions under its existing statutory framework.

Implications for the E-rate Program

The Court's decision to uphold the FCC's authority to administer and collect contributions for the Universal Service Fund (USF) ensures the continued operation of the E-rate program under its current structure. E-rate, which provides critical funding to help schools and libraries afford high-speed broadband and internal network infrastructure, will not face immediate disruption.

<https://www.fundsforlearning.com/news/2025/06/supreme-court-decision-preserves-e-rate-funding-new/>

What's New for 2026?

New Cat2 Budget Multipliers and Funding Floor

The C2 budget multipliers and the funding floor for each five-year funding cycle are set once at the beginning of the cycle and apply to the entire cycle.

In June 2025, the FCC announced C2 budget funding floors and multipliers for the FY2026-2030 funding cycle (see [DA 25-471](#)).

- The **school multiplier** is \$201.57 per student.
- The **funding floor** is \$30,175 (i.e. <150 students)

Applicants will be required to validate their student counts in the first year they apply for category two support during the FY2026-2030 cycle. Their category two budget will be set for the five-year period.

What's Still Going on in 2026?

Cyber Security Pilot Program



Cybersecurity Resource Recommendations



The Federal Communications Commission (FCC) is launching the [Schools and Libraries Cybersecurity Pilot Program](#) to provide up to \$200 million to selected schools and libraries to defray the costs of cybersecurity equipment and services. Given the critical importance of strong cybersecurity protections for K-12 schools' and libraries' networks, the FCC, in consultation with the Cybersecurity and Infrastructure Security Agency (CISA) and the Department of Education (ED), provide the following cybersecurity guidance and recommended resources to help keep networks and data safe. We recognize that schools and libraries often face budget and resource constraints, so these recommendations highlight free and low-cost options and focus on the most impactful initial steps. The [Cybersecurity Pilot Program](#) offers flexibility to allow each potential applicant to structure its request based on its unique needs and these resources are intended to serve as a guide for possible procurement approaches.

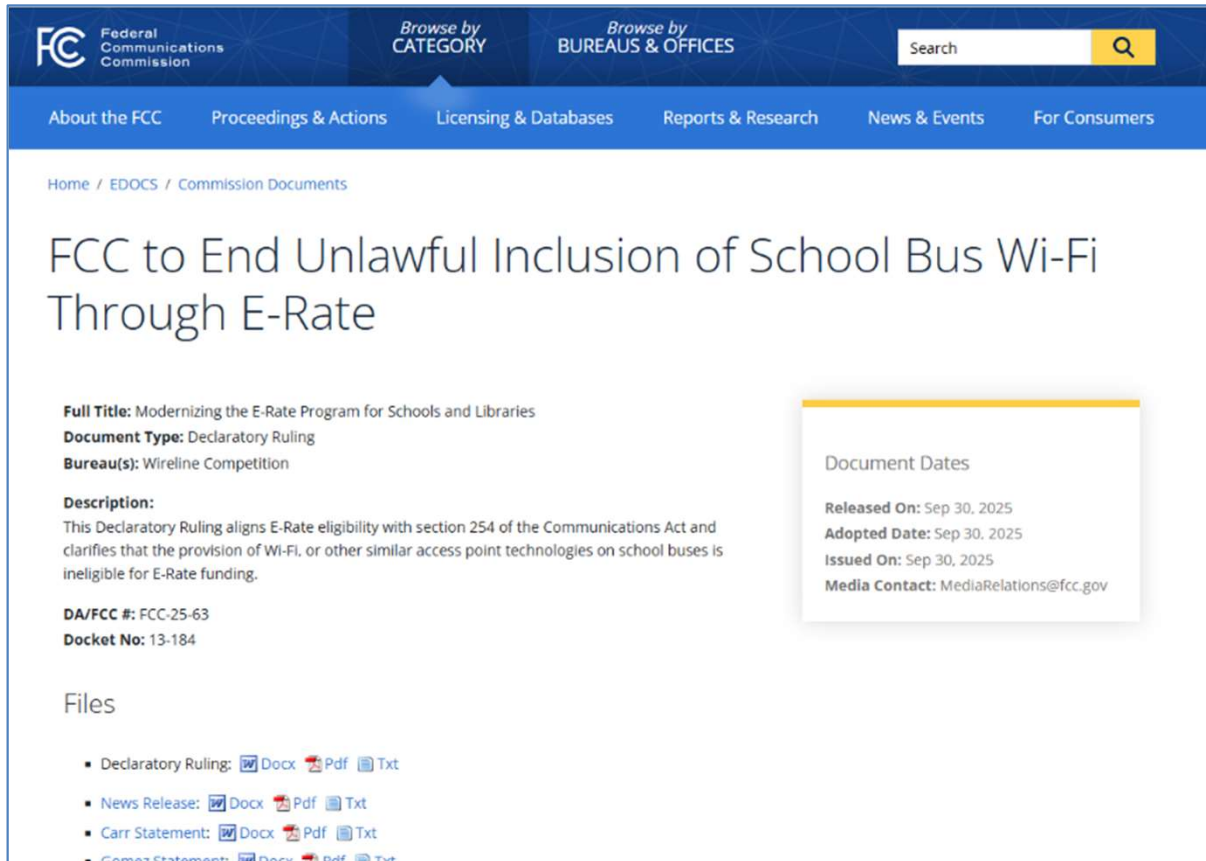
Which risks should I focus on first? Schools and libraries should consider the most common ways malicious cyber actors exploit technology to gain access to networks as identified in the joint CISA/ED [K-12 Critical Infrastructure Brief: Defensible and Resilient](#). These include:



← This document contains links to additional resources for cybersecurity

Hotspots & Bus WiFi Gone for 2025 and forward

FCC Reverses Eligibility of BusWiFi & Hotspots



The screenshot displays the FCC's official website. At the top, the FCC logo is on the left, and navigation links for 'Browse by CATEGORY' and 'Browse by BUREAUS & OFFICES' are in the center. A search bar is on the right. Below this, a blue navigation bar contains links: 'About the FCC', 'Proceedings & Actions', 'Licensing & Databases', 'Reports & Research', 'News & Events', and 'For Consumers'. The main content area shows the breadcrumb 'Home / EDOCS / Commission Documents' followed by the title 'FCC to End Unlawful Inclusion of School Bus Wi-Fi Through E-Rate'. Below the title, the 'Full Title' is 'Modernizing the E-Rate Program for Schools and Libraries', the 'Document Type' is 'Declaratory Ruling', and the 'Bureau(s)' is 'Wireline Competition'. A 'Description' section explains that the ruling aligns E-Rate eligibility with section 254 of the Communications Act, making Wi-Fi on school buses ineligible for E-Rate funding. It also lists 'DA/FCC #: FCC-25-63' and 'Docket No: 13-184'. To the right, a 'Document Dates' box shows 'Released On: Sep 30, 2025', 'Adopted Date: Sep 30, 2025', 'Issued On: Sep 30, 2025', and 'Media Contact: MediaRelations@fcc.gov'. At the bottom, a 'Files' section lists downloadable documents: 'Declaratory Ruling', 'News Release', 'Carr Statement', and 'Gomez Statement', each with links for Docx, Pdf, and Txt formats.

FCC Federal Communications Commission

Browse by CATEGORY Browse by BUREAUS & OFFICES

Search

About the FCC Proceedings & Actions Licensing & Databases Reports & Research News & Events For Consumers

Home / EDOCS / Commission Documents

FCC to End Unlawful Inclusion of School Bus Wi-Fi Through E-Rate

Full Title: Modernizing the E-Rate Program for Schools and Libraries
Document Type: Declaratory Ruling
Bureau(s): Wireline Competition

Description:
This Declaratory Ruling aligns E-Rate eligibility with section 254 of the Communications Act and clarifies that the provision of Wi-Fi, or other similar access point technologies on school buses is ineligible for E-Rate funding.

DA/FCC #: FCC-25-63
Docket No: 13-184

Document Dates
Released On: Sep 30, 2025
Adopted Date: Sep 30, 2025
Issued On: Sep 30, 2025
Media Contact: MediaRelations@fcc.gov

Files

- Declaratory Ruling: [Docx](#) [Pdf](#) [Txt](#)
- News Release: [Docx](#) [Pdf](#) [Txt](#)
- Carr Statement: [Docx](#) [Pdf](#) [Txt](#)
- Gomez Statement: [Docx](#) [Pdf](#) [Txt](#)

Handouts for today...available on KSDE Website

Copy of this
presentation (.ppt)

E-Rate Binder set of
folders (Windows)

E-Rate Project
Tracking Template
& Example (.xls)

Draft Eligible
Services FY2024
(.pdf)

Form 470 Item 13
requirements
(.docx)

Form 470 Response
Log Template &
Example (.xls)

Sample Bid
Evaluation (.xls)

Sample RFPs (new)
(.docx and .xls)

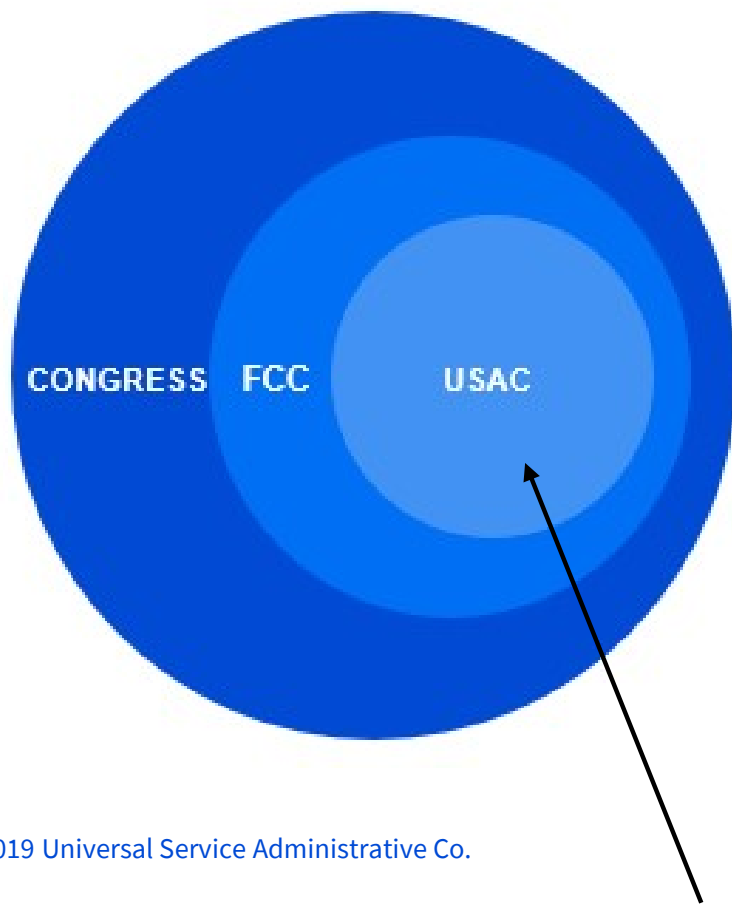
Asset Inventory
USAC Sample (.pdf)

SLD EPC Getting
Started Guide (.pdf)

Sample E-Rate
Contract 2024
(.docx)

Overview

WHO MAKES THE RULES?

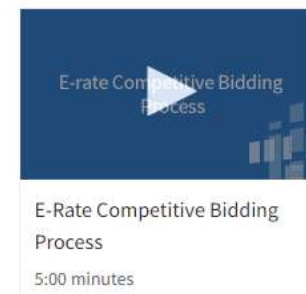
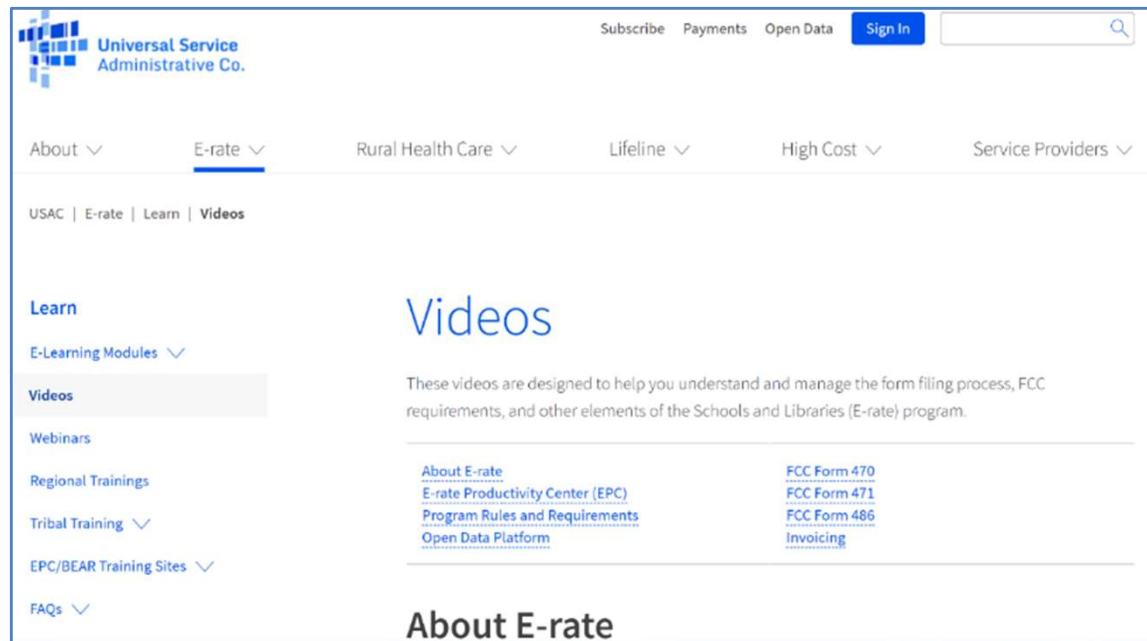


©2019 Universal Service Administrative Co.

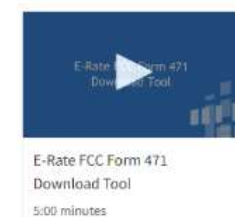
- Congress wrote the Telecommunications Act of 1996, which directed the Federal Communications Commission (FCC) to establish the E-rate Program and other programs.
- The FCC issues orders that set rules and policies for the program and gives direction to the Universal Service Administrative Company (USAC)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

SLD – Schools and Libraries Division is one division within USAC

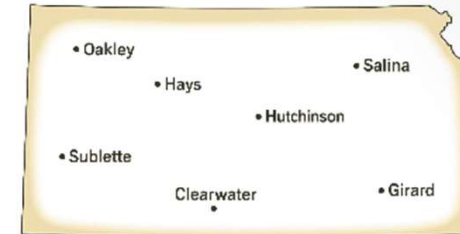
E-Rate 2026 – USAC Online Training Series



Open Data Platform



E-Rate 2026 – KS Resources



Kansas E-rate

[Home](#) [E-rate Overview](#) [E-rate Training](#) [Kansas Funding Map](#) [Resources](#)

Contact a representative at a Kansas service center to explore options for E-rate assistance:

Service Center	Location	E-rate Contact Name	E-rate Contact Email	Phone Number	URL
ESSDACK	Hutchinson	Brian Dater	briandater@essdack.org	620-931-2531	https://essdack.org/
Orion Education & Training	Clearwater	Tori Bohannon	tbohannon@orioneducation.org	620-584-3300	https://orioneducation.org
Southeast Kansas Education Service Center	Girard	Denise Grasso	denise.grasso@greenbush.org	620-724-6281	www.greenbush.org
Northwest	Oakley	Daniel C. Thornton	dthornton@nkesc.org	785-672-3125	www.nkesc.org
Smoky Hill	Salina	Tamera Burke	TBurke@smokyhill.org	785-825-9185	www.smokyhill.org
Smoky Hill	Hays	Deb Stewart	DSteward@smokyhill.org	785-621-4414	www.smokyhill.org
Southwest Plains	Sublette	Traci Taylor	traci.taylor@swplains.org	620-675-8804	www.swprsc.org

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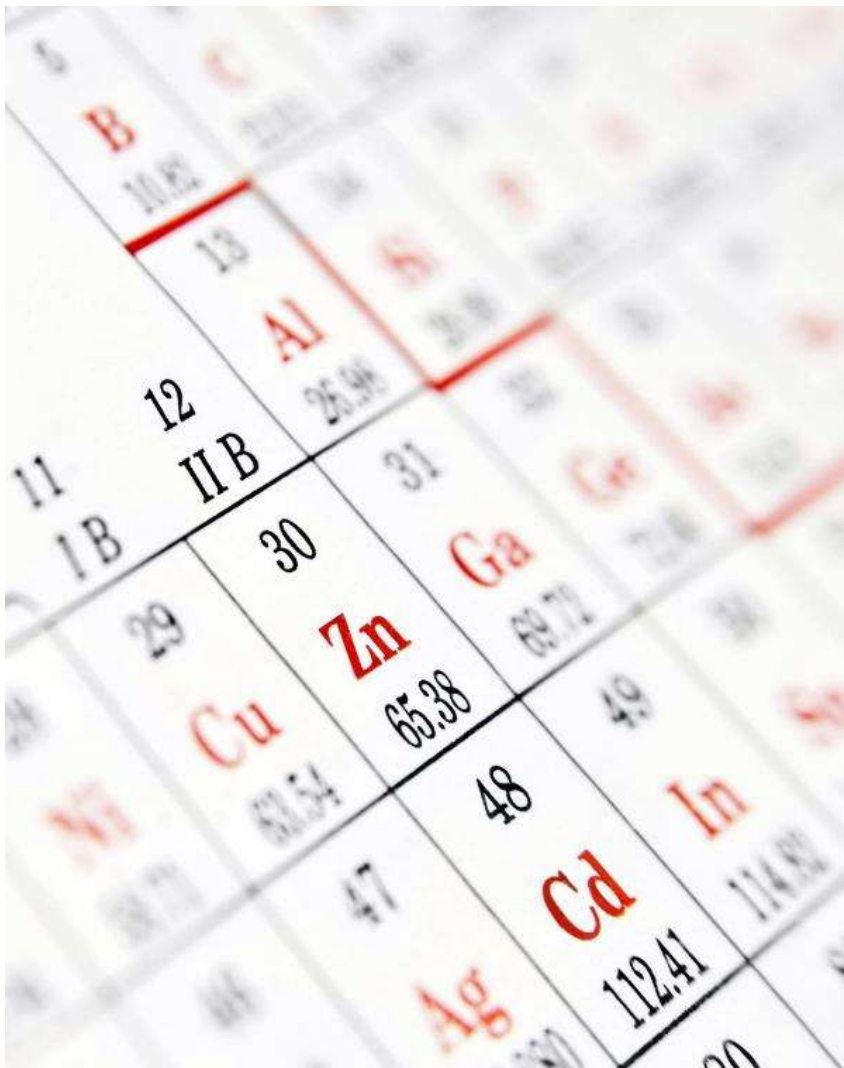
Email: erate@ksde.org

The Kansas State Department of Education does not discriminate on the basis of race, color, religion, national origin, sex, disability, or age in its programs and activities. ([more information...](#))

To accommodate people with disabilities, on request, auxiliary aides and services will be provided and reasonable modifications to policies and programs will be made. To request accommodations or for more information please contact the Office of General Counsel at gc@ksde.org or by 785-296-3201.

[KS Service Centers](#)

First Some Buzzwords...



- BEN – Billed Entity Number - A unique number assigned by USAC to each billed entity (school, library, or consortium) that pays for services.
- FRN – Funding Request Number - A unique number that USAC assigns to each funding request in an FCC Form 471.
- FY – Funding Year – see next slide
- NIF – Non-Instructional Facility - A school building without classrooms or a library building without public areas.
- SPIN – Service Provider ID Number - A unique number that USAC assigns to each service provider once that service provider has submitted the FCC Form 498 to USAC.

Funding Year

- A Funding Year (FY) starts on July 1 and ends the following June 30.
 - **FY2022 started on July 1, 2022 and ends on June 30, 2023.**
 - **FY2023 starts on July 1, 2023 and ends on June 30, 2024.**
- **Delivery and installation of services**
 - **Recurring services** (e.g., monthly internet access) must be delivered during the funding year.
 - **Non-recurring services** (e.g., equipment installations) can generally be installed through September 30 following the close of the funding year.
 - The September 30 deadline can sometimes be extended, either automatically or by request.
 - Delivery and installation can sometimes start before the funding year (i.e., before July 1).

Know Your Role

Applicants

- Register in the E-rate Productivity Center (EPC)
- File FCC Form 470 and attach RFP documents
- Evaluate bids and select the winning service provider, using price of the eligible products and services as the primary factor in your selection process.
- File FCC Form 471 during the application window
- Respond to inquiries from PIA
- File FCC Form 486
- File FCC Form 498 and file FCC Form 472 (BEAR) if applicable
- Document your compliance with FCC rules on an on-going basis.
- Retain documentation for at least ten years from last date of service delivery.

Today



Mar 2026



Oct 2026

Fair and Open Competition:

Available for Public Use

Open and Fair Guidelines

- All applicants must comply with all E-Rate, state, and local procurement requirements.
- Applicants cannot have a relationship with service providers that would unfairly influence the outcome of the competitive bidding process.
- Applicants cannot give anyone inside competitive information.
- Applicants cannot have ownership interest in the company of a service provider's which is competing for services.
- Applicants **must** describe the desired products and services with sufficient specificity to enable interested parties to bid.
- Applicants cannot receive gifts or donations from service providers that violate or seek to circumvent FCC rules.
- Applicants **are not** required to show "proof" of E-Rate participation or share their bid evaluation information with any service provider.

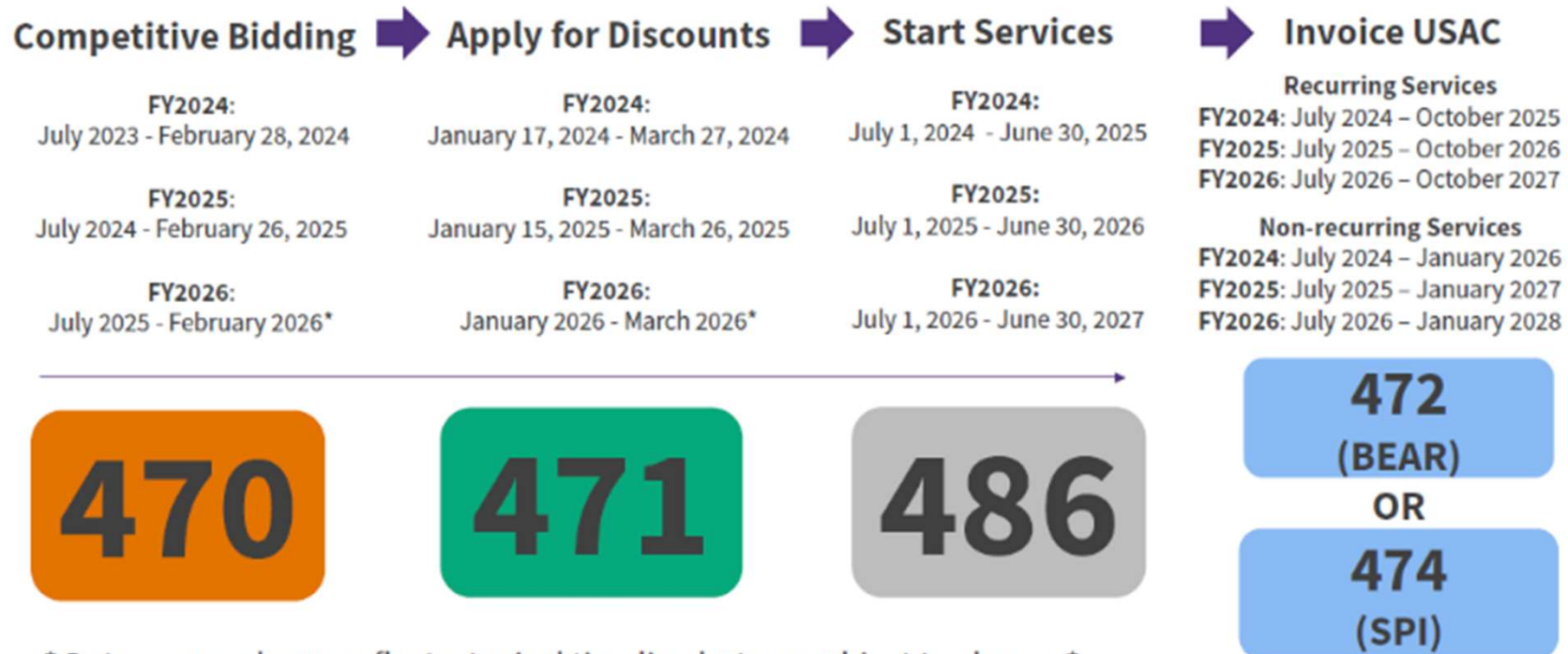
26

Available for Public Use

E-Rate Process — (E-Rate in 24 30 hours / year)

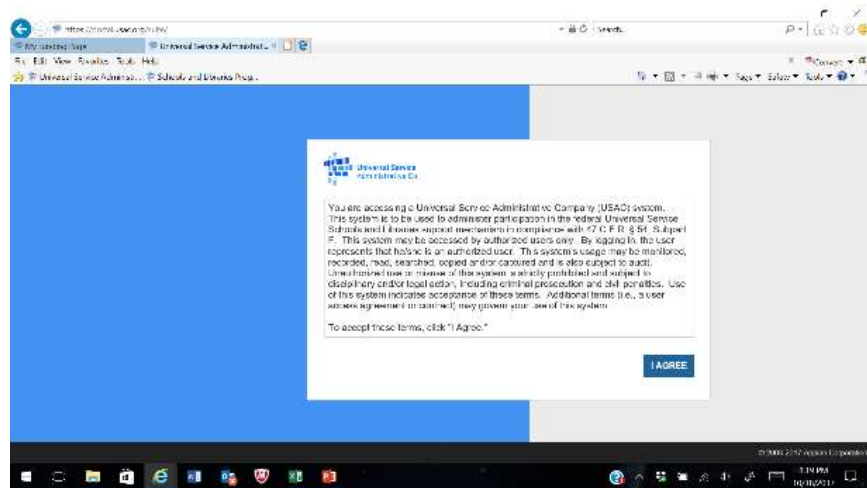
- Begin every new funding year with ...
 - E-Rate 20xx Folder
 - [E-Rate Project Tracking spreadsheet](#)
 - [E-Rate Binder](#)
- Document all activity as the funding year unfolds
- Draft & revise in Excel – cut & paste into EPC
- Schedule tasks vs respond to deadlines
- You will be working on 2 or 3 folders (years) at once

Applicant Forms and Important Dates Reminder



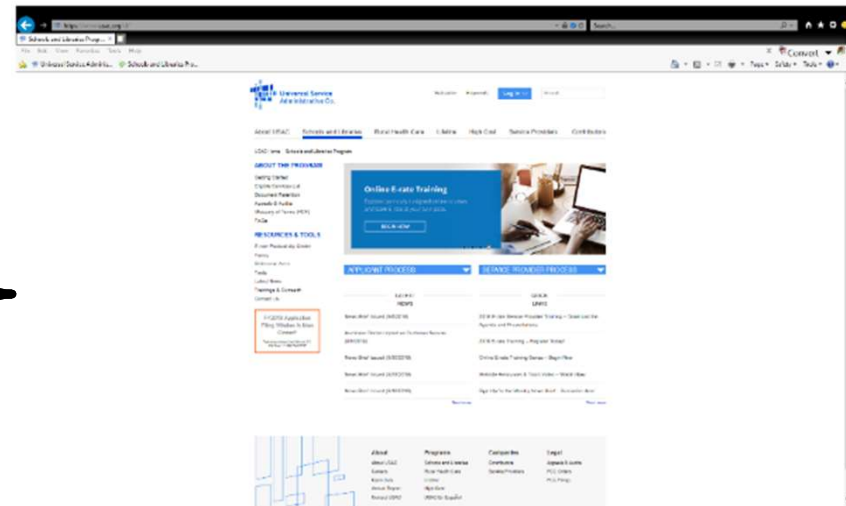
* Date ranges shown reflect a typical timeline but are subject to change.*

EPC Portal vs SLD (USAC) Website



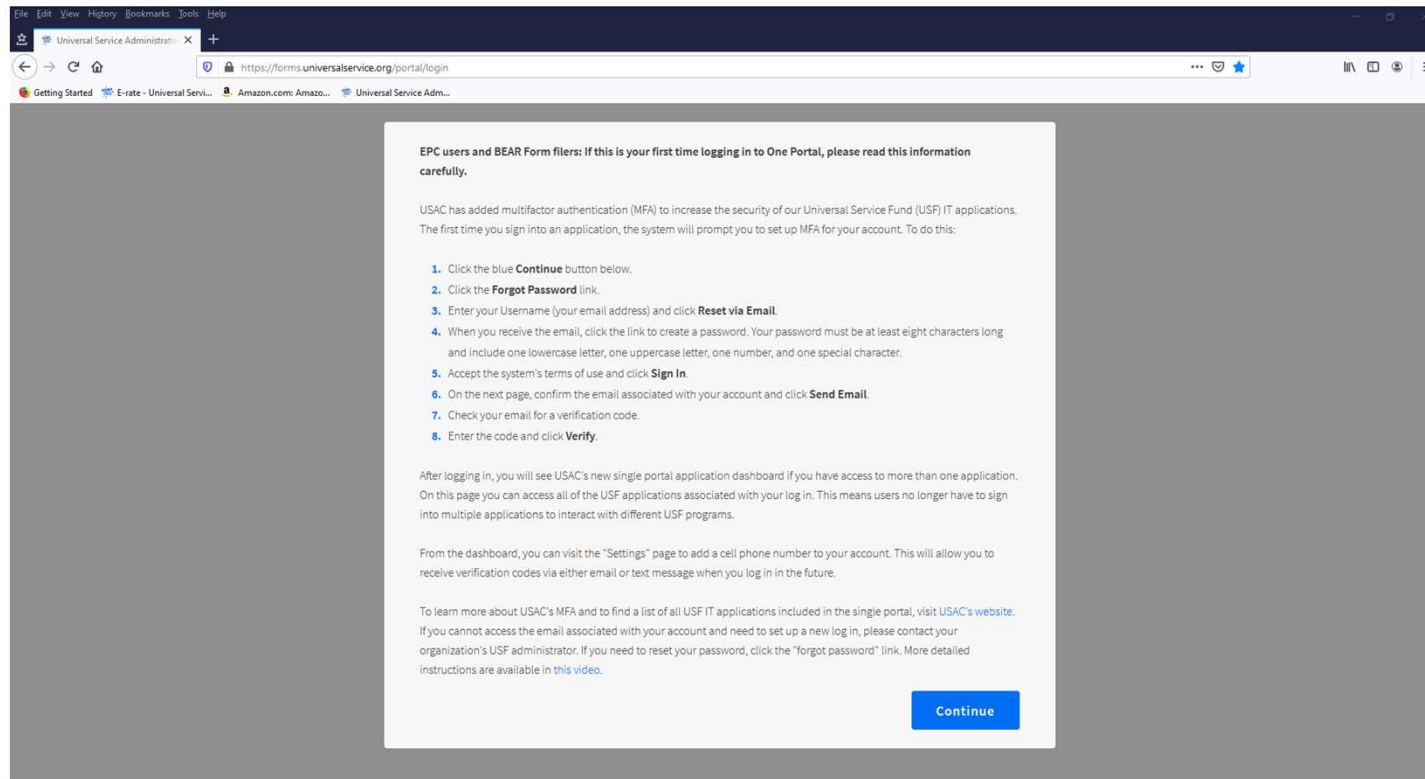
- Login Required
- Contains all info for YOUR school or district
- All Forms filed here

- NO Login Required
- Public website
- Contains info on E-Rate Program
- OPEN Data is here
- No Forms filed here



One Portal – first time login

<https://forms.universalservice.org/portal/login>



The screenshot shows a web browser window with the URL <https://forms.universalservice.org/portal/login>. The page displays instructions for first-time login for EPC users and BEAR Form filers. The instructions are as follows:

EPC users and BEAR Form filers: If this is your first time logging in to One Portal, please read this information carefully.

USAC has added multifactor authentication (MFA) to increase the security of our Universal Service Fund (USF) IT applications. The first time you sign into an application, the system will prompt you to set up MFA for your account. To do this:

1. Click the blue **Continue** button below.
2. Click the **Forgot Password** link.
3. Enter your Username (your email address) and click **Reset via Email**.
4. When you receive the email, click the link to create a password. Your password must be at least eight characters long and include one lowercase letter, one uppercase letter, one number, and one special character.
5. Accept the system's terms of use and click **Sign In**.
6. On the next page, confirm the email associated with your account and click **Send Email**.
7. Check your email for a verification code.
8. Enter the code and click **Verify**.

After logging in, you will see USAC's new single portal application dashboard if you have access to more than one application. On this page you can access all of the USF applications associated with your log in. This means users no longer have to sign into multiple applications to interact with different USF programs.

From the dashboard, you can visit the "Settings" page to add a cell phone number to your account. This will allow you to receive verification codes via either email or text message when you log in in the future.

To learn more about USAC's MFA and to find a list of all USF IT applications included in the single portal, visit [USAC's website](#). If you cannot access the email associated with your account and need to set up a new log in, please contact your organization's USF administrator. If you need to reset your password, click the "forgot password" link. More detailed instructions are available in [this video](#).

Continue

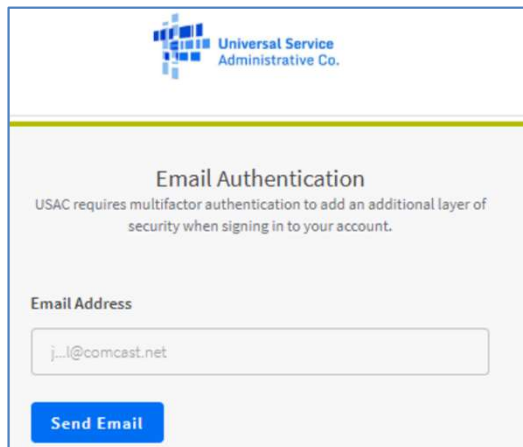
One Portal – first time login

- Just click on 'Forgot password'

- Enter EPC Username (email address)
- Click on 'Reset Via Email'
- Message will display saying to check your email and follow instructions to get back to login screen

One Portal – first time login

- Enter new password and verify
 - At least 8 characters
 - Upper and lower case
 - At least 1 special character
 - Cannot match any of your recent passwords



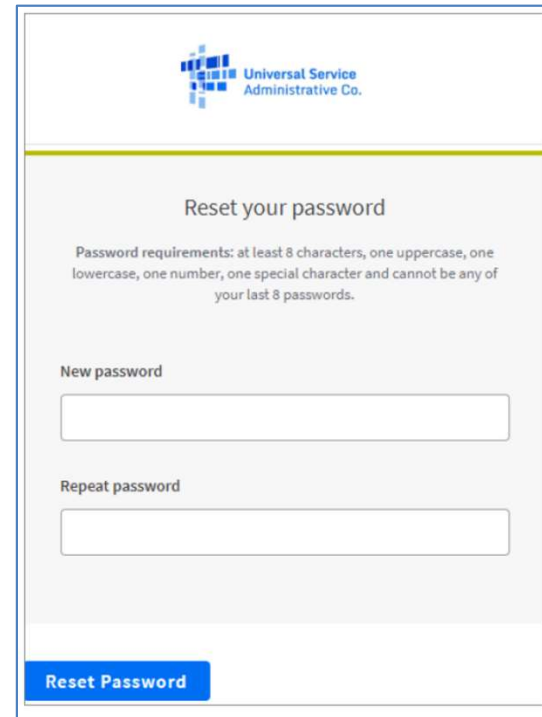
Universal Service Administrative Co.

Email Authentication

USAC requires multifactor authentication to add an additional layer of security when signing in to your account.

Email Address

[Send Email](#)



Universal Service Administrative Co.

Reset your password

Password requirements: at least 8 characters, one uppercase, one lowercase, one number, one special character and cannot be any of your last 8 passwords.

New password

Repeat password

[Reset Password](#)

- Verify your email address and click 'Send Email'

One Portal – first time login

- Check your email for 6 digit passcode
- Enter passcode and click Verify

Make Your Selection

- Select **Continue** to go to your program's system.
- Select **Manage My Authentication Settings** to update either your email address or phone number to access your account.

[Manage My Authentication Settings](#)[Continue](#)



Email Authentication

USAC requires multifactor authentication to add an additional layer of security when signing in to your account.

✓

Passcode has been sent to the following email address!

Email Address

j...l@comcast.net

Enter passcode

946118

Re-send Email

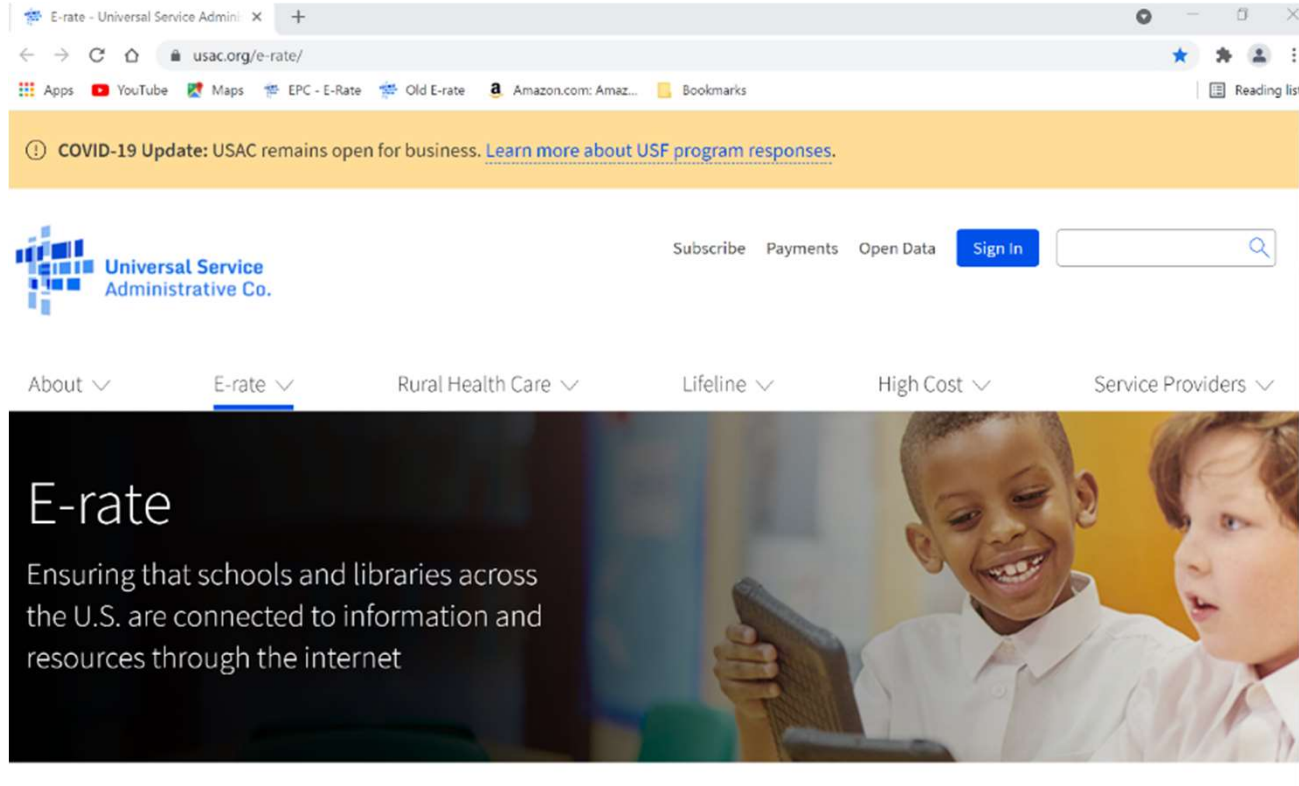
Verify

- Continue to EPC or
- You can setup phone as alternate device

E-Rate Productivity Center – Next Steps

- [Logon to confirm](#) your identity as Administrator
- Add users and/or consultants
- Grant rights
 - Full or Partial for Forms 470, 471, 486 etc.
 - School Official or General Financial Contact for 498
- Check all existing entities for correctness (don't forget NIFs)
- Update your Enrollment / NSLP data – your Cat2 budget depends only on your enrollment. Your total budget for the next 5 years will be set when you submit your first Form 471 for Category 2 items.

SLD Website



<http://www.usac.org/sl/>

SLD website – your school’s E-Rate History

- Form 471 Funding Tools and Open Data
 - Form 471 Summary Report – “[Funding Tools - FRN Status Tool](#)” – shows high level details on each FRN by Funding Year by BEN
 - Open Datasets – contain information on all details of Forms 470, 471 and 472 and 474 (BEARs and SPIs). [“USAC Open Datasets”](#)
 - *Open Datasets have both Original and Current data for each FRN. Current is actual, approved data (after PIA).*



Form 471 Summary Report - by BEN by Year

Funding Year	Application Number	Funding Request Number	Service Provider Name	FRN Total Pre-Discount Costs	Disc %	Funding Commitment Request	Invoicing Mode	Total Disbursement Amount	Status
2025	251004820	2599004312	CIRBN LLC	\$ 13,636.56	60%	\$ 8,181.94	NOT SET		Approved
2025	251004820	2599004317	CIRBN LLC	\$ 9,000.00	60%	\$ 5,400.00	NOT SET		Approved
2025	251006026	2599021291	CDW Government LLC	\$ 3,708.00	60%	\$ 2,224.80			
Total Cat1				\$ 26,344.56		\$ 15,806.74		\$ -	
Total Funding Year				\$ 26,344.56		\$ 15,806.74		\$ -	
2024	241004930	2499004569	CIRBN LLC	\$ 13,636.56	60%	\$ 8,181.94	NOT SET		Need Invoices for BEAR
2024	241004930	2499004574	CIRBN LLC	\$ 9,000.00	60%	\$ 5,400.00	NOT SET		Need Invoices for BEAR
2024	241004947	2499035866	Kajeet, Inc.	\$ 15,999.20	60%	\$ 9,599.52	SPI	\$ 5,071.08	Discounts Underway
Total Cat1				\$ 38,635.76		\$ 23,181.46		\$ 5,071.08	
Total Funding Year				\$ 38,635.76		\$ 23,181.46		\$ 5,071.08	
2023	231001693	2399000739	CIRBN LLC	\$ 13,636.56	60%	\$ 8,181.94	BEAR	\$ 8,181.94	Complete
2023	231001693	2399000746	CIRBN LLC	\$ 9,000.00	60%	\$ 5,400.00	BEAR	\$ 5,400.00	Complete
Total Cat1				\$ 22,636.56		\$ 13,581.94		\$ 13,581.94	
2023	231001764	2399000803	Heart Technologies, In	\$ 110,176.03	60%	\$ 66,105.62	BEAR	\$ 66,105.62	Complete
2023	231001764	2399000825	Heart Technologies, In	\$ 430,568.62	60%	\$ 258,341.17	BEAR	\$ 258,341.17	Complete
Total Cat2				\$ 540,744.65		\$ 324,446.79		\$ 324,446.79	
Total Funding Year				\$ 563,381.21		\$ 338,028.73		\$ 338,028.73	
2022	221013177	2299015975	CIRBN LLC	\$ 13,636.56	60%	\$ 8,181.94	BEAR	\$ 8,181.94	Complete
2022	221013177	2299015978	CIRBN LLC	\$ 9,000.00	60%	\$ 5,400.00	BEAR	\$ 5,400.00	Complete
Total Cat1				\$ 22,636.56		\$ 13,581.94		\$ 13,581.94	
Total Funding Year				\$ 22,636.56		\$ 13,581.94		\$ 13,581.94	
2021	211005382	2199005901	CIRBN LLC	\$ 9,000.00	60%	\$ 5,400.00	BEAR	\$ 5,400.00	Complete
2021	211005382	2199005903	CIRBN LLC	\$ 13,636.56	60%	\$ 8,181.94	BEAR	\$ 8,181.94	Complete
Total Cat1				\$ 22,636.56		\$ 13,581.94		\$ 13,581.94	
Total Funding Year				\$ 22,636.56		\$ 13,581.94		\$ 13,581.94	



Form 471 Line-Item Report

Application Number	Funding year	Form Version	FRN Line Item Number	Product Type	Make	Equipment Model	FRN Line		
							FRN Line One- Time Eligible Unit Cost	One- Time Quantity	FRN Line Total Eligible Cost
231001764	2023	Current	2399000803.001	Switch	Meraki	MS225-48FP-HW	\$ 3,630.39	21	\$ 76,238.19
231001764	2023	Current	2399000803.002	License	Meraki	LIC-MS225-48FP-5YR	\$ 638.44	21	\$ 13,407.24
231001764	2023	Current	2399000803.003	Switch	Meraki	MS225-24P-HW	\$ 2,687.69	2	\$ 5,375.38
231001764	2023	Current	2399000803.004	License	Meraki	LIC-MS225-24P-5YR	\$ 399.02	2	\$ 798.04
231001764	2023	Current	2399000803.005	Connectors	Meraki	MA-CBL-40G-3M	\$ 159.79	21	\$ 3,355.59
231001764	2023	Current	2399000803.006	License	Meraki	LIC-MX450-ENT-5YR	\$ 11,001.59	1	\$ 11,001.59
231001764	2023	Current	2399000803.007	License	Meraki	LIC-MX450-SEC-5YR	\$ -	1	\$ -
									\$ 110,176.03
231001764	2023	Current	2399000825.001	Cabling	Other	Various	\$ 140,495.62	1	\$ 140,495.62
231001764	2023	Current	2399000825.002	Installation, Acti	Panduit	Installation	\$ 290,073.00	1	\$ 290,073.00
									\$ 430,568.62

[Mahomet Line-Item Report 2023.xlsx](#)

[E-Rate Request for Discount on Services: FRN Line Items \(FCC Form 471 and Related Information\)](#)

GETTING READY TO APPLY



E-Rate Annual Cycle - 7/1/xx through 6/30/xx

Verify Portal Information

NOW

Plan & File Form 470

Assess Technology Needs / Budgets
Gather Discount Information



Oct - Nov

Develop Competitive RFPs (if required)

Nov - Dec

Advertise

Vendor Conference(s)
Vendor Responses Received

System / Vendor Selection

Board Approvals
Contract Negotiation

Dec - Jan

Final Contracts Signed

Jan

Forms Submission to SLD (Form 471)

Feb/Mar 2026

Implementation (Form 486 / 500 / 472)

July – June

E-Rate Process – Case Study

- “Interview yourself” to fill in the blanks in [Project Tracking Spreadsheet](#)
 - What fields need to be changed and what fields stay the same from last year to this?
 - What services are under multi-year contract and do not need a Form 470?
 - What new services are needed and what existing services can go away?
- Build your annual calendar from today through 471 filing

E-Rate Program Rules – Basic Requirements

- Focus on delivery of Broadband and WiFi
- Competitive Process – requests must be posted for 28 calendar (not business) days
- All funds must be used for
 - eligible goods and services
 - installed at eligible facilities
 - provided by eligible service providers
- **All records must be kept for 10 YEARS – from the last activity on the application!!!**

You may need CIPA compliance for E-Rate



CIPA

Children's Internet Protection Act (CIPA)

- School and library authorities must certify that they are enforcing a policy of Internet safety that includes measures to block or filter Internet access for both minors and adults to certain visual depictions.
- CIPA compliance is required for:
 - **Category One** – Internet access, and
 - **Category Two** – internal connections, managed internal broadband services, and basic maintenance of internal connections

CIPA Requirements

CIPA requirements:

1. Internet Safety Policy

- Internet safety policy (For schools, the policy must also include monitoring the online activities of minors.)

2. Technology Protection Measure

- A technology protection measure is a specific technology that blocks or filters Internet access.

3. Public Notice and Hearing or Meeting

- Publish a public notice and hold at least one public hearing or meeting to address a proposed technology protection measure and Internet safety policy.

CIPA Requirements

Available for Public Use

CIPA: Public Notice and Hearing or 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.



ELIGIBLE GOODS AND SERVICES



Eligible Services List (ESL) 2026

[Draft Eligible Services List 2026](#)



PUBLIC NOTICE

Federal Communications Commission
45 L Street NE
Washington, DC 20554

News Media Information 202 / 418-0500
Internet: <https://www.fcc.gov>
TTY: 1-888-835-5322

DA 25-921

Released: September 30, 2025

WIRELINE COMPETITION BUREAU SEEKS COMMENT ON PROPOSED ELIGIBLE SERVICES LIST FOR THE E-RATE PROGRAM

WC Docket No. 13-184

Comment Date: October 15, 2025
Reply Comment Date: October 30, 2025

The Wireline Competition Bureau (Bureau), pursuant to section 54.502 of the Federal Communications Commission's (Commission) rules, seeks comment on the proposed funding year (FY)

E-Rate Eligibility - What's Covered

- **Category 1 – no budget limit – technology neutral**
 - Data Transmission (WAN Services)
 - *Internet Access – no longer includes School Bus WiFi or offsite Hotspots*
- **Category 2 - \$201.57/student FY2026-2030**
 - Internal Broadband and WiFi - LAN/WAN wired and wireless components including cabling, switches, routers, racks, UPS. Includes installation and maintenance on all eligible items (no servers). Includes licenses and operating system software.
 - Basic Maintenance – only for work actually performed
 - MIBS - Managed LAN and Wi-Fi (can include both equipment and 'management' - does not have to come from same supplier)

E-Rate Eligibility - What's Covered

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Categories of Services

- **Category One (C1)**

- Data Transmission and/or Internet Access
- ~~Bus Wi-Fi~~
- ~~Off-premises Wi-Fi hotspots~~
- ~~Wi-Fi Hot spots is the only C1 equipment and/or service with a budget~~
- Visit the [Eligible Services List](#) on our website

- **Category Two (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 (FY2021-2025)
- See [Category Two Budgets](#) page

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What's Not Covered - same as forever

- Servers, Voice and Video equipment
- Computers, Telephone instruments, Video Cameras
- Power infrastructure
- Physical security or construction
- Application Software
- Internet Content
- Consulting Services, Training, Personnel Costs

Eligible Fiber Services 2026 – Cat1



Fiber Options Supported By E-rate

- **Leased Lit Fiber:** A fiber-based broadband service where the service provider owns and manages the network, and the E-rate applicant pays a recurring fee to have data transported over the network.
- **Leased Dark Fiber (including IRUs):** The E-rate applicant leases a portion of a provider-owned and maintained fiber network and separately pays to have that fiber lit in order to transmit information over that fiber.
- **Self-Provisioned Network:** Complete 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 owns and maintains that network or portion.

Note: Although included as a fiber option, applicants may seek support for self-provisioned networks using technologies other than fiber.

Eligible Services 2026 – Cat1

- Category 1 – Dark Fiber Clarifications
 - Modulating electronics and equipment necessary to “light” the dark fiber are now eligible as Category 1 funds
 - Special construction charges for dark fiber may include the costs of installing fiber from the service provider’s existing network all the way into the applicant’s building
 - There are many technical requirements for 470/RFP if seeking “self-provisioned fiber”
 - **FORM 470 and RFP CANNOT STATE A PREFERENCE FOR ANY SPECIFIC TECHNOLOGY if asking for dark or self-provisioned**

Eligible Services 2026 – Cat2

- Category 2 – Internal Connections and Maintenance
 - Internal Connections
 - *Cabling, switches, access points, UPS's...can also include installation, initial configuration and operator training*
 - Basic Maintenance of Internal Connections – no changes
 - *Break-fix materials and labor to repair any eligible device – usually filed based on estimates and equipment inventory. Cannot include Network Monitoring*
 - Managed Internal Broadband Services – no changes
 - *Outsourced operations and management of your network. Equipment can be owned by district or vendor. Usually fixed fee – monthly or annual. May include Network Monitoring*
 - *Can be in addition to normal BMIC services*
 - *Many new vendors are catering to this market (Wyebot, SecureDesigns...)*

ELIGIBLE LOCATIONS

E-Rate Eligible Locations — only four types of entities exist

- Parent — usually a district
- Child — usually a school ([entity sub-types](#))
- Annex — usually part of a school
- [NIF - Non-Instructional Facility](#)

SCHOOLS:

- Administrative buildings
- School bus barns and garages
- Cafeteria offices
- Facilities associated with athletic activities

LIBRARIES:

- Administrative buildings
- Bookmobile garages
- Interlibrary loan facilities
- Library technology centers

E-Rate Eligible Locations – Category 2

- Category 2 services for administrative sites (NIFs) are NOT eligible unless those services are “essential for the effective transport of information to a classroom or library”.

E-Rate Eligible Locations – update your list

- What locations (entities) are you responsible for ?
- Update all Entity Information in EPC
 - School Names, addresses...
 - Enrollment and Free & Reduced
 - Part time Students are no longer allowed
- What is this year's C2 budget for the district ?
- What is this year's discount rate?
- If necessary use 'One Number' total for Enrollment
(enter at bottom of home page under Cat2 Budget)
- Add all information to EPC and [Project Spreadsheet](#)

Category Two Budget for 2026

- Every Billed Entity will have a Cat2 Budget of \$201.57/student for the period from 2026-2030
- The Funding Floor (per school minimum) is \$30,175
- C2 budget is determined when the first C2 Form 471 is certified. ***It will not change for the period.***
- Total Cat2 Budget will be ***managed by district*** not by individual school
- Budget is PRE-DISCOUNT. Ex: with 1000 students and a 50% discount your budget is \$201,570.00 and the discount you receive is \$ 100,785.00.

E-Rate Category 2 for 2026

Entity Name	Entity Number	Physical Address	Physical City	User-Entered Urban/Rural Status	C2 School Student Count	Number of Full-Time Students	Number of NSLP Students	y Eligibility Program (CEP)
Lincoln Trail Elem School	72264	102 E State St	Mahomet	Rural	739	739	153	No
Mahomet-Seymour High School	72263	302 W State St	Mahomet	Rural	956	956	159	No
Mahomet-Seymour Jr High School	72265	201 W State St	Mahomet	Rural	736	736	170	No
Middletown School	72266	101 N Division St	Mahomet	Rural	807	807	170	No
Sangamon Elementary School	72267	601 W Main St	Mahomet	Rural	0	0	0	No
				Enrollment	3238	3238	652	
				Discount	60%			
Mahomet Transportation	16023154	101 North Division	Mahomet					No
Mahomet-Seymour Admin Building	16030543	101 North Division	Mahomet					No
Cat2 Budget 2026-2030 @ \$201.57	\$ 652,684							
Approved 2026 - Remaining 2027	\$ -							
Approved 2027 - Remaining 2028	\$ -							
Approved 2028 - Remaining 2029	\$ -							
Approved 2029 - Remaining 2030	\$ -							
Approved 2030	\$ -							

Keep track of Cat2 funds used to know what's available. You can use a Form 500 to return unused funds for re-use in coming year.

[EPC will show your original and current Cat2 Budget](#)

DISCOUNTS

E-Rate Discounts – No changes for schools

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Discount Matrix

Income <i>Measured by percentage of students eligible for NSLP</i>	Urban Status Discount Rate	Rural Status Discount Rate
Less than 1%	20%	25%
1% to 19%	40%	50%
20% to 34%	50%	60%
35% to 49%	60%	70%
50% to 74 %	80%	80%
75% to 100%	90% for C1, 85% for C2	
	Tribal Libraries: FY23 and earlier: 90% for C1, 85% for C2 FY24 and later: 90% C1 & C2	

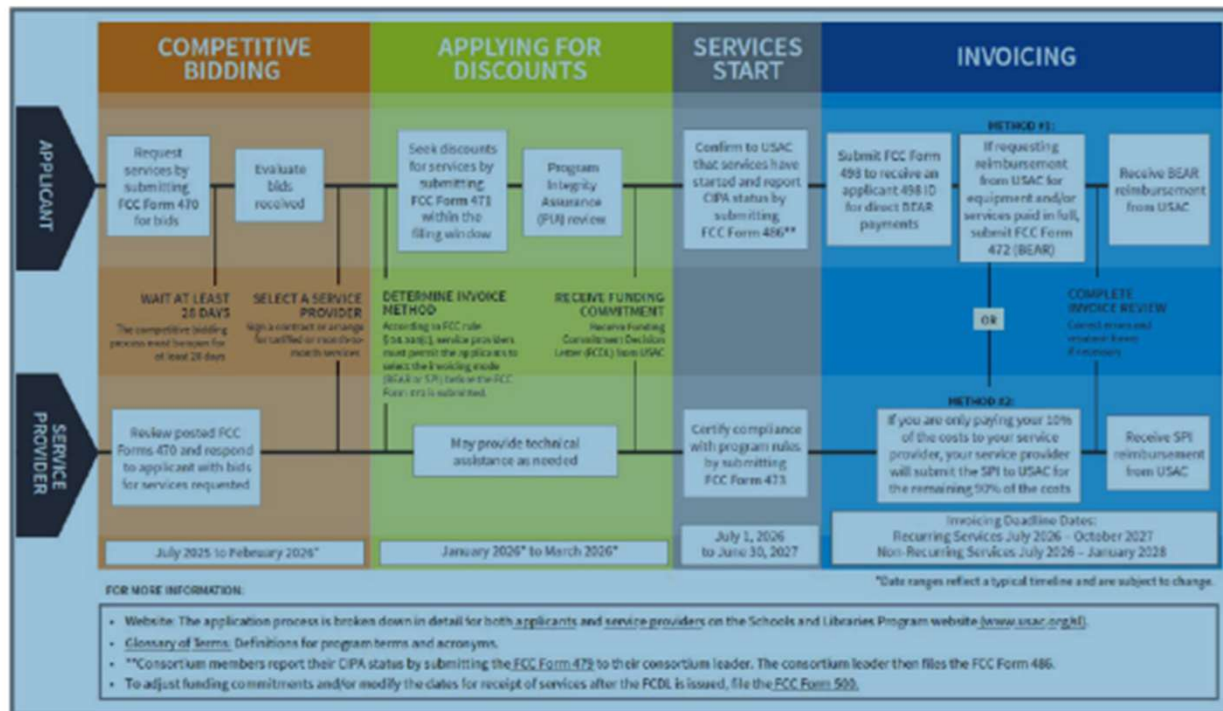
- National School Lunch Program (NSLP), Category One (C1) Services, Category Two (C2) Services
- The maximum discount rate for FY2024 and later C2 equipment and services was increased by the FCC in FCC 23-56 from 85% to 90% for tribal libraries with NSLP percentages between 75-100%

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Calculating Discounts - two variables

- The percentage of students eligible for the National School Lunch Program (NSLP) or an equivalent measure of poverty
- The urban or rural status of the county or census tract in which the school or library building is located
- Find both at <http://e-rateks.ksde.org/resources.aspx>

The E-Rate Application Process: FY2026



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470

471

486

472
(BEAR)
OR
474
(SPI)

Applying for E-Rate Form 470



E-Rate Form 470 – What's it for?

- Filing Form 470 opens a competitive bidding process
 - can also issue a Request for Proposals (RFP)
- RFP is not required under FCC rules
- Form 470 'smart' menus
 - Your selections determine your next questions
 - Drop down menus that prevent errors and omissions
 - You can always backup and start over
 - Remember the difference between Internet and WAN

E-Rate Form 470 – Gotcha's

- You must wait at least 28 days from the submission date before signing a contract for services – this is the ACD
- If you are under a multi-year contract from a previous year, you do not need to file a Form 470 every year
- If you are under Month-Month or Tariff rates, you must file a Form 470 every year
- Include willingness to accept multi-year contracts and any restrictions on them
- Must include any pass/fail requirements!!
- If you include Basic Maintenance on your 470 you must include it on your RFP ***(RFP and Form 470 specs must match)***

E-Rate Form 470 – Gotcha's

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Competitive Bidding Tip

When unsure whether a service falls under one of two service types, you are allowed to request bids for **both** service types.

For example, if you are unsure whether a service falls under Internal Connections or Basic Maintenance of Internal Connections, you have the option to seek bids for both.



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E-Rate Form 470 – 28 Day Rule

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28-Day Waiting Period Review and Reminders

Applicants must wait at least 28 days after certifying their [FCC Form 470](#) before selecting a service provider, executing any contracts for contracted services, or signing and submitting an [FCC Form 471](#). **The allowable contract date (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.**

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

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

- **When does the waiting period start?** *The 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 a part 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.*

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E-Rate Form 470 – 28 Day Rule

Allowable Contract Date Infographic

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

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

Remember

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



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

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

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

E-Rate Form 470

Competitive Bidding Requirements: Imposing Restrictions

- You cannot list specific make and model of products or services sought without also allowing equivalent products and/or services to be bid.
 - “XYZ manufacturer's router model 345J or equivalent”
- Bidder disqualification criteria must be spelled out in FCC Form 470 and/or RFP and be available to all potential bidders.
- EPC will automatically add the “or equivalent” language for you in the FCC Form 470, but remember to double check the language in your RFP, if you are issuing one, to include the words “or equivalent.”
- If you have bid disqualification factors, you must list them in your FCC Form 470.

E-Rate Form 470 – specify a cutoff date!

- Consider adding “State or Local Procurement Requirements” to protect yourself...
 - Responses must be received via email only to email@myschool.org.
 - Responses must include detailed pricing and descriptions.
 - ***Responses must be rec’d ON OR BEFORE the Allowable Contract Date.***
 - Vendor must agree to SLD (SPI) invoicing.
 - Multi-year contracts and voluntary extensions accepted.
 - Vendor is aware of and agrees to follow SLD guidelines on Lowest Comparable Price.
 - **SPAM and/or robotic responses will not be considered valid bid responses and will be disqualified from consideration.**
 - Failure to comply with any of the items above may be grounds for disqualification.

E-Rate Process

- Draft 470 descriptions into [Project Tracking Spreadsheet](#)
- Put in enough detail to allow a fair bid based on 470 specifications alone or...
- Put in a reference to an RFP
 - Can be a one-page description
 - Can be a formal RFP document
 - You must upload a copy

E-Rate Form 470 - Reminder

Reminder - Changes to Form 470 for 2025/2026

- Ability to upload RFP documents after certification
 - Will ask you if this is a “Substantial Change” and automatically reset the Allowable Contract Date
 - Could be easier to just cancel and re-issue a new Form 470
- Ability to cancel Form 470 and view canceled forms



E-Rate Form 470

FCC Form 470 - Funding Year 2026

Basic Information

Service Requests

Technical Contact Information

Procurement Information

FCC Form 470 Review

Certifications & Signature

> FCC Notice Required By The Paperwork Reduction Act (OMB Control Number: 3060-0806)

< Billed Entity Information

School District 10595
1 Pine Street
Rockville, MD 20850
012-345-6789
school_dist_10595@mailinator.com

Billed Entity Number: 9646
FCC Registration Number: 0123456789

Application Nickname

Please enter an application nickname here. *

DISCARD FORM

SAVE & SHARE

SAVE & CONTINUE

[Form 470](#)



E-Rate Project Tracking Spreadsheet

471 #	Total Pre-Discounted										
Att#	Cat	Description	2025 FRN	2026 FRN	Vendor	SPIN	Amount	% Disc	Total E-Rate Funding	Total District Funding	2026 Notes
1.1	471#	Internet	Dedicated Internet	2599004312	CIRBN LLC	143036797	\$ 13,636.56	60%	\$ 8,181.94	\$ 5,454.62	Needs new 470
1.2		Internet	Data Transmission	2599004317	CIRBN LLC	143036797	\$ 9,000.00	60%	\$ 5,400.00	\$ 3,600.00	No 470 for 2026-Contract through 06-30-28
1.3	471#	Hotspot Usage	Hotspot Usage	2599021291	CDW-G	143005588	\$ 3,708.00	60%	\$ 2,224.80	\$ 1,483.20	??
Total Cat1							\$ 26,344.56		\$ 15,806.74	\$ 10,537.82	
1-Feb	471#	Int Conns				143005588	\$ -	60%	\$ -	\$ -	
Total Cat2							\$ -		\$ -	\$ -	
Total This Year							\$ 26,344.56		\$ 15,806.74	\$ 10,537.82	

Project Tracking Example 2026

What's Next...

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Next Steps After The 28-Day Waiting Period



- The **Allowable Contract Date** occurs at the end of the 28-day waiting period. This is the earliest date on which an applicant can select a service provider and sign a contract for services or enter into an arrangement for tariffed or month-to-month services with a service provider.

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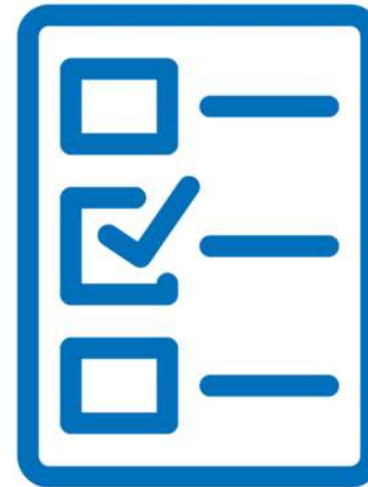
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Issues in Competitive Bidding

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What If You Receive No Bids?

- If applicants receive no bids or only one bid, they can:
 - Proactively solicit bids after waiting the 28 days.
 - Ask their current provider to submit a bid.
 - Accept the one bid, if it is cost effective.
- Be sure to create a memo for your E-Rate files to document the situation.



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Vendor Selection – if there's not a formal RFP

- You must document and retain your vendor selection process
- Use this template or one of your own to record Form 470 responses from vendors
- Keep logs of all vendor emails
- Can also use for bid evaluations

E-Rate Form 470 Service Provider Response and Selection Log						
Use this form to log all vendor contacts regarding non-RFP items on this Form 470. Document Service Provider Selection and assign FRN numbers only after the Allowable Contract Date. Form 470 items that are described by a formal RFP should be documented elsewhere.						
Funding Year:	2023		Contact Name:	(Your Name)		
Applicant Name:	Sample School District		Latest Update:	11/16/2022		
BEN:	(Your BEN)		470 Posting Date:	11/16/2022		
Form 470 No.:	(Your 470#)		470 Allowable Contract Date:	12/14/2022		
470 Date Closed:	12/16/2022		470 Review/Selection Date:	12/16/2022		
Form 470 Description:	Cat1 Internet NoRFP and Cat2 Cabling with RFP + Addendum					
Use Item Descriptions from Form 470	Date	Vendor Name / SPIN	Mode of Contact	Notes, Comments and Actions Taken	Bid?	Winner
Telecommunications						
Dedicated Internet at minimum of 1gb/sec up to 10gb/sec. Provide incremental pricing.	11/28/22	Frontier	Email	Bid for pricing at both locations plus optional router. 3yr/1gb w/router would be \$890 + \$2010 + \$50 = \$2950/mo		
	12/15/22	Volo	Email	Bid for both locations at 1gb is \$2,600/mo + \$13,940 Installation		
	12/16/22	CIRBN	Email	Incumbent service provider - 2.5gb for \$1136.38/mo		X
	No other bids rec'd					
Category 2						
See RFP for structured cabling - mandatory walkthru	12/15/22	Consolidated	Email	Proposal for \$506,663.68 as four separate proposals.		
	12/16/22	Heart	Email	proposal for \$435,568.62		X
	No other bids rec'd					

[Form 470 Response Log Spreadsheet](#)

Vendor Selection – if there is a formal RFP

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Evaluating Bids: Sample Bid Evaluation Matrix

- Evaluate your bids using a matrix, filled in with your chosen factors and point values.

Factor	Points Available	Vendor 1	Vendor 2	Vendor 3
Price of eligible equipment and services	50	15	50	35
Prior experience with vendor	20	20	0	20
Service provider bonded	20	7	13	20
Local or in-state vendor	10	10	8	7
Total	100	52	71	82

Result: Vendor #3 wins. Note that this may not be the lowest cost vendor.

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[How to Construct a Bid Evaluation \(EPC Website\)](#)

[Sample Bid Eval](#)

Vendor Selection – Do You Need a Contract?

- YES – for Category 1 FRNs that are not Tariff or MTM
- YES – for all Category 2 FRNs
- Applicants must have a signed contract or ***other legally binding agreement*** in place prior to submitting their FCC Forms 471 to USAC.
- Contracts can cover more than one year or contain extensions, but applicant must have indicated these options in the Form 470

Contracts must be entered into EPC prior to 471

- Gather all information on your contract or have a soft copy on file
- [Enter via Portal](#)
- Contracts can be corrected only up to the point of submission – no changes after that

[Signed Contract Kajeet - MS 2024](#)

[Sample E-Rate Contract 2026](#)

E-Rate Process – Case Study

- Draft bid results into [Project Tracking Spreadsheet](#)
- You will need this information for the Form 471
- For each FRN you should have...
 - Service Provider and SPIN
 - Description, Quantity and Unit Cost (Cat1 and Cat2)
 - Total Monthly and/or Total One-Time Costs
 - Form 470 Reference if needed (470's are pre-loaded)
 - Contract Reference if needed (Contracts are pre-loaded)
 - Recipients of Service and Cost Allocation if needed

Applying for E-Rate Form 471



Requesting Funding

FCC Form 471

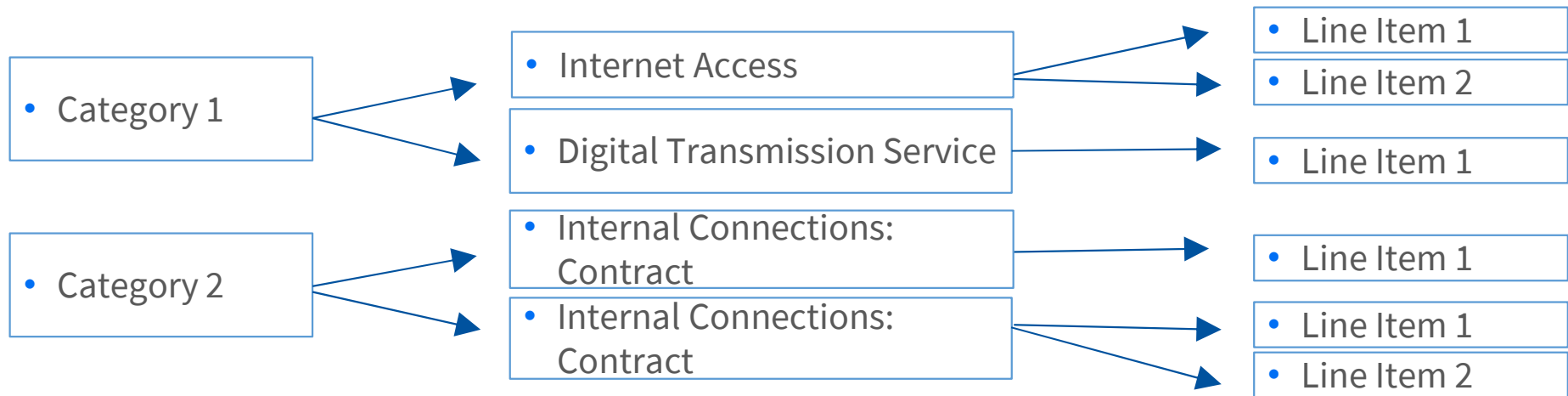
- File one per category of service

Funding Request

- Add one per service type, service provider, FCC Form 470, contract/service agreement
- Provides summary information
- Each request is identified by an ID number called a Funding Request Number (FRN)

FRN Line Item

- Add one or more per FRN
- Provides details about the individual services or products listed on the funding request



E-Rate Form 471 – What will you need

- EPC access
- Entity and Discount data (already entered)
- Contract information (already entered)
- Funding Request data (from [Project Tracking Spreadsheet](#))
 - Manuf / Make / Model
 - Unit Cost / Quantity and Cost Allocation (if required)
 - *Recipients of Services – only if needed internally*
- Certification authority

E-Rate Form 471

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Requesting Funding: Helpful Reminders

- The category of service and service type for an FRN must match the category of service and service type that appeared on the FCC Form 470.
- Separate your taxes and fees into a separate FRN line item.
- If you are purchasing a multiple of something, remember to list the quantity and the unit cost, and do not bundle all costs under a quantity of one.

E-Rate Form 471

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Eligible Equipment or Services: Key Reminders

- Equipment and services fall into a particular **Category of Service**.
- Commitments for different categories of service can be for different term lengths.
 - Internal Connections – **All years** of the contract can be billed in a single funding year
 - e.g., For a 3-year contract for 100% eligible Internal Connections equipment or services at a pre-discounted amount of \$12,000, the full amount of \$12,000 could be entered into a single FRN for that funding year.
 - BMIC – Only the **current year** of service can be included in a single funding year and multi-year contract amounts must be prorated.
 - e.g., For a 3-year contract for 100% eligible BMIC services at a total pre-discounted amount of \$12,000, the FRN could only request 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.

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E-Rate Form 471

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Eligible Equipment or Services: Key Reminders

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

How To Determine

Contact the manufacturer or Customer Service Center (CSC) to determine a particular equipment item or service's eligibility before submitting your FCC Form 471 to:

1. Determine eligibility under E-Rate, and
2. Confirm the category of service for that eligibility.

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E-Rate – Remove Ineligible Costs

Vendor Cost Allocation Links: Some manufacturers have websites to help applicants determine if the products they're listed on their Form 471s are E-rate eligible, partially eligible, or 0% eligible.

- * Cisco/Meraki - <https://www.ciscoerate.com/ProductEligibility/>
- * Fortinet - <http://erateproviderservices.com/fortinet-home/product-eligibility/>
- * HP Aruba - <https://www.arubanetworks.com/eratetool/>
- * Juniper - <https://www.juniper.net/assets/us/en/local/pdf/faqs/9030313-en.pdf>
- * Palo Alto - https://www.paloaltonetworks.com/content/dam/pan/en_US/assets/pdf/technology-solutions-briefs/panw-e-rate-eligibility.pdf
- * Sophos - <http://erateproviderservices.com/sophos-home/product-eligibility/>

[See link in your handouts: Manufacturers' Eligibility Percentages](#)

E-Rate Form 471 – Online

OMB 3060-0806
FCC Form 471

Approval by OMB
December 2018



Description of Services Ordered and Certification Form 471

Universal Service
Administrative Co.

FCC Form 471

Application Information

Nickname MS 471 01 Cat1 2025
Funding Year 2025

Application Number 251004820
Category of Service Category 1

Billed Entity

MAHOMET-SEYMOUR C U SCH DIST 3
1301 S Bulldog Dr MAHOMET IL 61853
217-586-4415
jlynn@ms.k12.il.us

Contact Information

Kyle Williams
217-586-2161
kwilliams@ms.k12.il.us

Billed Entity Number 136287
FCC Registration Number 0011915816
Applicant Type School District

[Example Form 471](#)
[Form 471 Online](#)

E-Rate Form 471 – after you certify

- Update [Project Tracking Spreadsheet](#) with FRN info
- Review all documentation in E-Rate Binder
- Check all quantities and dollar amounts
- If you made a mistake, you should file a RAL Modification request in EPC as soon as possible (under Form 471/Related Actions/RAL Modification)
- Prepare for PIA review

PIA Review – What is it ?

Forms 471 are reviewed by Program Integrity Assurance (PIA) for compliance with program rules concerning areas such as:

- Competitive bidding process
- Contracts
- Discount Calculation
- Sufficient Budget
- Establishing Form 470
- Cost Effectiveness
- Duplicative Services (Two Internet Lines)

PIA Review → Review Inquiries

Outreach – Initial Review - Commitment

- Initial Reviewer should send you an email pointing you to your EPC portal for responses
- Some Form 471 applications see Selective Review (SRIR)
- Some Form 471s see Special Compliance Review (SCRIR)
- All review documents between applicant and SLD are thru EPC portal – but you can email or call the reviewer
- Log all activity to [Project Tracking Spreadsheet](#)
 - *Hint – use the SLD Call Log tab...60 day rule*
 - *SLD may change reviewers on you!!*

PIA Review – Corrections Allowed

Clerical Corrections

Examples:

- Entered the incorrect amount (i.e., data entered \$100 instead of \$1,000)
- Omitted an entity from the Block 4
- Provided the incorrect Form 470 number on the Form 471
- Selected the wrong category of service
- Submitted an unsigned contract to PIA
- Omitted an FRN
- ***YOU ARE ALLOWED TO CORRECT ERRORS
– BUT NOT TO CHANGE YOUR MIND***

E-Rate Approval & Acceptance!

- You will receive an FCDL (Funding Commitment Decision Letter) for each Form 471 that you submit
 - You will receive email from SLD pointing you to EPC
 - FCDL is in the NEWS feed of EPC – or search ‘Notifications’ from Landing Page
 - Shows status of individual funding requests in downloadable .csv file
- *If this is for Cat2 you should download the Form 471 Detailed Report [from OPEN DATA that shows CURRENT details and approved amounts.](#)*
- *Many times the equipment that you are approved for will be different that the equipment that you applied for*
- *Save this as your documentation for equipment inventory.*



E-Rate Approval & Acceptance

ALWAYS Appeal a decision you don't agree with

Call BTU Hotline for assistance

866-372-8302

Accepting E-Rate Funds

Form 486

E-Rate Form 486

- Notifies USAC that services have started and invoices can be paid
- Verifies / Modifies Service Start Date
 - *Start date cannot be prior to 7/1 of the Funding Year or 486 will go into 'Review'*
- Certifies that CIPA is in force (if required) and meets requirements.
- Be careful - Service Providers can consider this as “permission to invoice” and USAC will not inform you.

E-Rate Form 486 Deadline

- Form 486 must be filed no later than
 - 120 days after the Service Start Date or
 - 120 days after the date of the FCDL
whichever is later.
- If the Form 486 is late, the date 120 days before the Form 486 online filing or postmark date will become the start date for discounted services and funding may be reduced. *(i.e. they take back the money one month at a time for each month you are late).*

E-Rate Implementation Deadlines

Service delivery deadlines

- Recurring Services (June 30)
- Non-recurring Services (September 30)

For Category 2 - you can request extensions (Form 500) but your request must be filed before current deadline.



E-Rate Form 486 – this is the easy part

Records / FCC Forms 486

MS 486 01 Cat1 2025 - #401782

Summary

Associated FRNs

Review Inquiries

News

Related Actions

In-Review

Outreach

Review Completed

Notification Issued

▼ FCC Form 486 Form Details

View Status (+)

Funding Year 2025

Submitting Organization MAHOMET-SEYMOUR C U SCH DIST 3 (BEN: 136287)

Created By Don Dietrich

Created On 8/21/2025 2:03 PM EDT

▼ Billed Entity Information

MAHOMET-SEYMOUR C U SCH DIST 3

1301 S Bulldog Dr

MAHOMET, IL 61853

217-586-4415

jlynn@ms.k12.il.us

Billed Entity Number: 136287

FCC Registration Number: 0011915816

Applicant Type: School District

▼ Main Contact

Name Kyle Williams

Email kwilliams@ms.k12.il.us

Phone Number 217-586-2161

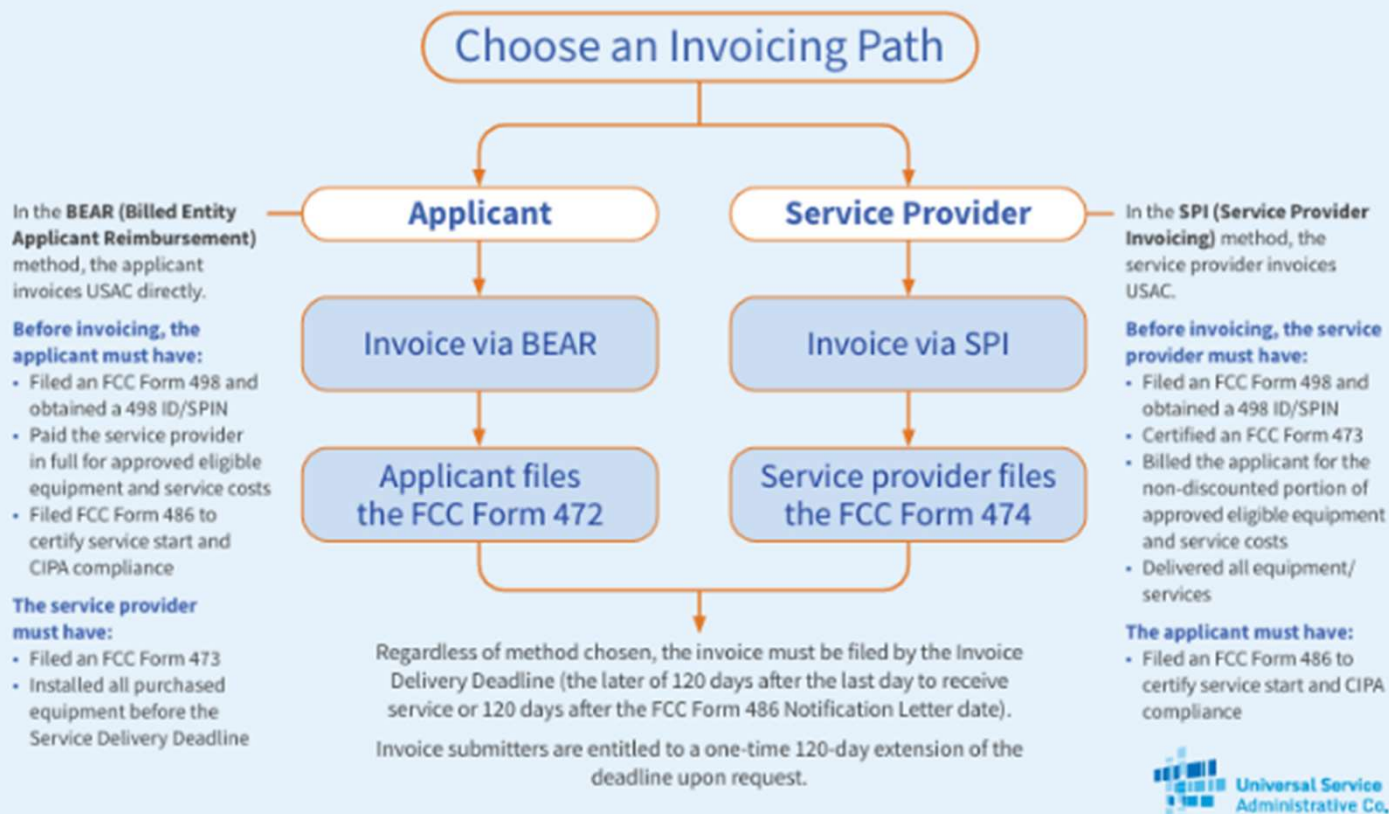
▼ Service Information

FRN Number	Application Number	FRN Nickname	Category of Service	SPIN	Service Provider	Actual Service Start Date
2599004312	251004820	CIRBN Internet 2025	Category 1	143036797	CIRBN LLC	7/1/2025
2599004317	251004820	Fiber to HS 2025	Category 1	143036797	CIRBN LLC	7/1/2025

Certifications

Select an Invoicing Method in E-Rate

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



BEAR Process



FCC Form 498

What You Need: Applicant Identification Numbers

You will need three identification numbers:

- (1) Federal Employer Identification Number (EIN/Tax ID)
 - Note: This EIN/Tax ID must match information on file with FCC (FRN)
- (2) DUNS Number
- (3) FCC Registration Number (FRN) or (CORES ID)

BEAR Process

What You Need: Bank Information

- Bank Information
 - Bank Name
 - Account Number
 - Routing Number (nine-digit number)
 - (Note the order of the fields!)
- Note: This cannot be a consultant's bank account.

BEAR Process



FCC Form 498

How to Access the FCC Form 498: My Landing Page

News Tasks (11) Records **Reports** Actions Sam IndependentLibrary1 - Appeal

My Landing Page

Funding Request Report | FCC Form 479 | FCC Form 471 | FCC Form 486 | Appeal | Manage Users | Manage Organizations | USAC Website | Contact Us | Help

Welcome **USAC Independent Library 1** [Click name](#)

Notifications

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

Notification	Description	Issued Date	Generated By	Generated On
No items available				

My Entities

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- Click on Organization Name
- Click on Related Actions

BEAR Process

- Click on the checkerboard
- Then click on “EPC Invoice”



Click on “File FCC Form 472

E-Rate Form 500 – *it's only six questions*

- Change FRN Start Date
- Contract Extensions
- FRN Extensions – Cat2 time to complete work
- FRN Reductions/Cancellations
 - Cat1 – returns funds to overall SLD Budget
 - Cat2 – returns funds to your Cat2 Budget
- [Form is online](#) in EPC – takes less than 5 mins

Category 2 Record Keeping

- You must retain records of all equipment and services including the location, serial number, date etc.
 - Make up your own tool or use SLD example:
[Asset Inventory samples-checklist-inventory-list from USAC](#)

ASSET REGISTER (Inventory List): Little Red School House School District																			
There have been many requests for USAC to provide guidance with respect to what information should be included as you maintain products for which you have received E-Rate discounts. Below is an example of an inventory tracking worksheet that may be helpful. In addition, retaining this type of information will be very helpful if USAC requests this information in the future. This example is not mandatory or intended to serve any other purpose than to respond to requests for guidance.																			
ATF App Number	FRN	Applicant Name	SEN	Fund Year	Category of Service	Equipment Description	Serial #	Make & Model	Date of Purchase	USAC Invoice #	Install Date	Original Location	Current Location	Replacement Date (if applicable)	Customer ID #	Customer ID #	Bill amount	Notes	
111111	1234567	Little Red School House SD	78901	2004	Internal Access	Modem	IS 1000A1023 34567	Proxim USG Modem V.32 22K	15-Jul-04	123123	15-Jul-04	Little Blue School 101 Room NW			1-Jul-04	ABC 1001		\$ 500.00	
111111	1234567	Little Red School House SD	78901	2004	Internal Connections	Email server	123-45 678	Zenon XPS100	15-Jul-04	212121	15-Jul-04	Yellow HS Admin 101 Room #4252	Yellow HS MT Room #999	22-Feb-07	1-Jul-04	ABC 1002		\$ 500.00	Server was replaced as a result of an electrical fire. Replace serial # 15 123 45-678
111111	2345678	Little Red School House SD	78901	2004	Internal Connections	Switch	4567891011	Acme X311 Switch	1-Aug-04	212121	1-Aug-04	Yellow High School Admin 101 Room #4252	Yellow HS MT Room #999	22-Feb-07	1-Aug-04	ABC 1003		\$ 1,000.00	Switch was replaced as a result of an electrical fire. Replace serial # 12 345 678910
111111	2345678	Little Red School House SD	78901	2004	Internal Connections	UPS		Power Sentry 3000	2-Aug-04	212121	2-Aug-04	Yellow HS Admin 101 Room #4252	Yellow HS MT Room #999	22-Feb-07	1-Aug-04	ABC 1004		\$ 250.00	
111111	2345678	Little Red School House SD	78901	2004	Internal Connections	UPS		Power Sentry 3000	2-Aug-04	212121	2-Aug-04	Purple MS 2nd Floor 101				ABC 1005		\$ 250.00	
Additional information to keep in mind:																			
- Label all equipment with FRN and FY. - Keep a schematic/network diagram of all equipment and the location in the building(s) including drops/wall jacks. - Maintain records of equipment for at least 5 years. - Keep maintenance details, what equipment has been serviced, the hours spent, who performed the service, date the service occurred.																			
Transfer of equipment information:																			
3 years after the date of purchase, equipment can be transferred to other eligible entities. - Equipment can be transferred from a closed location to other eligible entities within 3 years of the date of purchase.																			

Additional information to keep in mind:

- Label all equipment with FRN and EY.
- Keep a schematic/network diagram of all equipment and the location in the building(s) including drops/wall jacks.
- Maintain records of equipment for at least 5 years.
- Keep maintenance drills (what equipment has been serviced, the hours spent, who performed the service, date the service occurred).

Transfer of equipment information:

- 3 years after the date of purchase, equipment can be transferred to other eligible entities.
- Equipment can be transferred from a closed location to other eligible entities within 3 years of the date of purchase.

Revised 12/2007

Service Substitutions

- Use if you change (buy) *anything* that varies from what you described on your 471 & Item 21
- No FORM, [just follow instructions in EPC](#)
- *Check your Category 2 projects for changes*
- *Vendors may not be paid for equipment or services that do not match your Form 471 detail*
- *The downloaded Form 471 Detailed Report shows the specific equipment that USAC has approved.*

SPIN (Service Provider ID Number) Changes

- CORRECTIVE changes will be approved (correct errors, mergers, acquisitions etc.)
- OPERATIONAL changes are usually not approved unless the original provider goes out of business
- Usually approved (or denied) in a few weeks
- Vendors will be notified
- [File Online in EPC](#)

Split FRN – if cutover of Cat1 is delayed...

SLD will not pay for duplicative services

- If your new Internet provider was supposed to start on July 1 but didn't cutover until Aug 1...
 - Then instead of 12 mos of new provider funding
 - You need 11 mos of new provider funding
 - You need 1 month of old provider funding
- Open a customer service case to request a SPLIT FRN to re-allocate funds – call BTU for assistance

Dual Internet Lines...

Available for Public Use

USAC Does Not Pay For Duplicative Services

- **Duplicative services** are services that provide the same functionality for the same population in the same location during the same period of time. *USAC cannot fund duplicative services.*
- **Backup services** are services sought to reduce reliance on any single service provider's network during an outage and are considered duplicative.
- Services that provide necessary bandwidth requirements, such as multiple T-1 lines when appropriate for the population served and the services to be received, may not be considered duplicative. However, the applicant must still evaluate and choose the most cost-effective option from the bids received.

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Available for Public Use

Record Retention – *“if it isn’t written down it didn’t happen”*

- Setup an electronic ~~and paper~~-file for each funding year
- Email yourself and retain all emails
- Make a spreadsheet across years
- Monitor at least monthly
- Build an [E-Rate Binder](#)

Must Retain for 10 YEARS after end of svcs

Audit and Assurance Division (AAD) 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		

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Audit/Assessment Process

Initial Document Requests

- PQA -<https://www.usac.org/wp-content/uploads/e-rate/documents/SL-Documents.pdf>
- SCAP -<https://www.usac.org/wp-content/uploads/about/documents/pdf/audit/Supply-Chain-Audit-Checklist.pdf>
- BCAP -<https://www.usac.org/wp-content/uploads/e-rate/documents/resources/e-rate-program-list-of-documents-to-retain.pdf>

Final Tips

- Start early
- Set up / update your EPC
- Document everything
- Email yourself to memorialize
- Build and retain an “E-Rate Binder” (10 years)
- Plan for an audit

471 Filing Window FY 2026

- opens at noon (EST)
on ????
- closes at 11:59pm
(EST) on ????
- ***LAST DAY FOR Form
470 is ????***





Kansas Resources

Kansas Department of Education

<http://e-rateks.ksde.org/>

Email to erate@ksde.org

Jenni Marlatt

Public Service Administrator

Kansas K-12 E-Rate Coordinator

Information Technology

(785) 296-7931

jmarlatt@ksde.org

www.ksde.org

Kansas State Department of Education

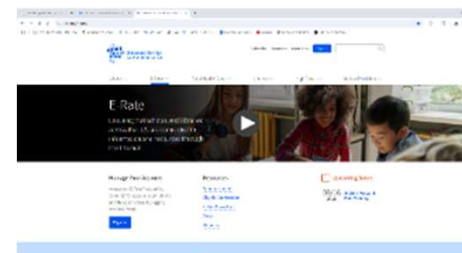
LANDON STATE OFFICE BUILDING

900 SW JACKSON STREET, SUITE 301

TOPEKA, KS 66612

More Resources

- **Funds for Learning:**
- <http://www.fundsforlearning.com>
- **E-Rate Central:**
- <https://e-ratecentral.com/>
- **SLD Home Page:**
- <https://www.usac.org/e-rate/>





Information & Assistance BTU Kansas E-Rate Support Hotline

866-372-8302

Our Goal: Answer all questions – escalate or provide references and contacts as required.

Resources include:

SLD / FCC and affiliated agencies & hotlines

KS Dept of Education



Information & Assistance BTU Kansas E-Rate Support Hotline

We Can Provide Advice on:

SLD forms 470, 471, 486, 472, 500

Eligibility of goods, services and locations

Strategy for writing an appeal

SPIN Change, Service Subs, Invoice Extensions

We Cannot:

Prepare, complete or submit FCC forms

Act on behalf of an entity



Information & Assistance

BTU Consulting, LLC

Toll Free Support Hotline – 866-372-8302

Email to:

Lori Thompson: lori@btu-consultants.com

Valerie Thompson: valerie@btu-consultants.com

Don Dietrich's email: ddietrich@e-rateprofessionals.com

Don Dietrich's Cell Phone: 314-378-1667

Questions ?