



E-Rate Funding Year 2025 for Kansas Schools

Don Dietrich

BTU Consultants, LLC

(Includes content from [USAC Training October 7, 2024](#))



E-Rate 2025 Agenda

8:30am – 10:15am

E-Rate News, Refresh & Updates

Hotspots and Cybersecurity

Websites and Resources

Your E-Rate History and Open Data

Preparing for E-Rate

Changes for 2025 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 2025?

[WiFi Hotspot Details - BTU](#)



FACT SHEET: Supporting Wi-Fi Hotspots to Connect Students and Library Patrons

Latest Modernization to the E-Rate Program Will Support Connectivity for Educational Purposes as Congress Intended

"It should be the standard practice that students or anyone who can't afford internet at home can check out a Wi-Fi hotspot from their local library. This update is how we'll help close the Homework Gap and support folks on the wrong side of the digital divide so they can fully participate in modern civic and commercial life."

– FCC Chairwoman Jessica Rosenworcel

What's New for 2025?

Cyber Security Pilot Program





**Schools and Libraries
Cybersecurity Pilot Program**

The Federal Communication Commission's (FCC) Schools and Libraries Cybersecurity Pilot Program (Pilot Program) will provide up to \$200 million in Universal Service Fund support to eligible schools and libraries to defray the cost of eligible cybersecurity services and equipment. The three-year Pilot Program aims to address cybersecurity threats facing schools and libraries, including being targeted by malicious actors who seek to steal personal information, compromise online accounts, cause online harm or embarrassment, or otherwise disable/disrupt critical networks that provide broadband connectivity.

Administered by the Universal Service Administrative Company (USAC) with oversight from the FCC, the Pilot Program will follow many of the processes used in the E-Rate program, including competitive bidding, requests for eligible service and equipment, and a reimbursement process.

The FCC and USAC will offer robust training to help interested parties navigate the Pilot Program's selection and application process. Further training will also be provided to program participants regarding the Pilot Program's competitive bidding, funding application, and reimbursement processes.

To learn more about the Pilot Program, visit www.usac.org/e-rate/cyber-security-pilot-program.



- Includes Links to:
 - Eligible Services List
 - Getting Started Guide
 - FAQ's
 - Signup for Newsletter
- Signup period ends 11/1/24

[USAC Cybersecurity Website](#)

What's New for 2025?

July 26, 2024



US Court Rules USF Mechanism Unconstitutional

The U.S. Court of Appeals for the Fifth Circuit recently ruled the current Universal Service Fund (USF) mechanism unconstitutional. Here are the key points and implications of this decision:

- **Current Status:** The existing E-rate rules and programs remain in effect. The court remanded the case to the FCC but did not vacate the USF mechanism. *The status quo continues for the indefinite future.*
- **Circuit Split:** This decision creates a split among the circuit courts (the USF was deemed constitutional in both the 6th and 11th Circuits).
- **Appeal Process:** The government is expected to request a stay on the decision, likely to be granted because of the split between the 5th, 6th, and 11th Circuits.
- **Strong Precedent:** There is a strong precedent for the USF being upheld as a fee, not a tax. Even the conservative 5th Circuit was nearly split, with two Republican judges dissenting.

The E-rate and other USF-supported programs will continue without interruption for the time being and we do not anticipate any change to the program. The USF-programs are considered mission critical and play an important role in the telecommunications ecosystem of the United States. It will likely take a year for the Supreme Court to consider the case. In the unlikely event that the Supreme Court upholds the 5th Circuit's decision (over the other two Circuits), the Supreme Court is likely to give Congress and/or the FCC some time to reform the USF process. The flow of support to USF beneficiaries is likely to remain in place for the foreseeable future.

We will continue to monitor the situation closely and provide updates as new information becomes available.



<https://www.fundsforlearning.com/news/2024/07/us-court-rules-usf-mechanism-unconstitutional/>



What's New for 2025?

Changes to Form 470

- Ability to upload RFP documents after certification
- Ability to cancel Form 470 and view canceled forms
- Added drop down menus for Hotspot devices and services
- Added selection for School Bus WiFi devices and services

[See USAC Newsbrief of Aug 28, 2024](#)

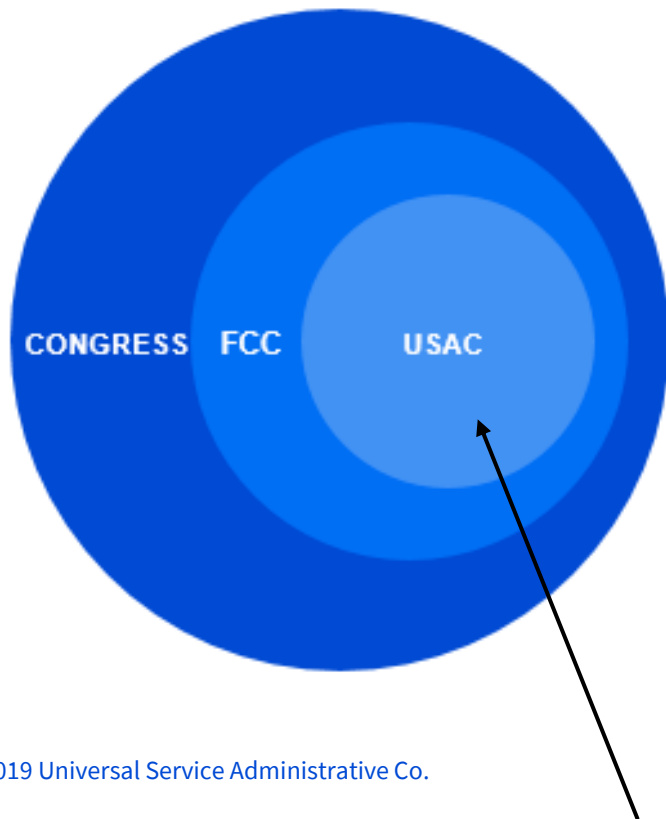


Handouts for today...available on KSDE Website

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?



- 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.

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SLD – Schools and Libraries Division is one division within USAC

E-Rate 2025 – USAC Online Training Series

Universal Service Administrative Co.

Subscriber Payments Open Data Sign In

About E-rate Rural Health Care Lifeline High Cost Service Providers

USAC | E-rate | Learn | Videos

Learn

E-Learning Modules

Videos

Webinars

Regional Trainings

Total Training

EPC/BEAR Training Sites

FAQs

Videos

These videos are designed to help you understand and manage the form filing process, FCC requirements, and other elements of the Schools and Libraries (E-rate) program.

About E-rate
E-rate Productivity Center (EPC)
Program Rules and Requirements
Open Data Platform

FCC Form 476
FCC Form 471
FCC Form 488
Invoicing

About E-rate

E-Rate Competitive Bidding Process

5:00 minutes

Open Data Platform

E-Rate Entity Search Tool

2:00 minutes

E-Rate C2 Budget Tool FY2021

13:30 minutes

E-Rate FCC Form 471 Download Tool

5:00 minutes

E-Rate 2025 – Additional Resources

KANSAS
STATE DEPARTMENT OF
EDUCATION
Home E-rate Overview E-rate Training Kansas Funding Map Resources

Kansas E-rate

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 Duter	brianduter@essdack.org	620-931-2531	https://essdack.org/
Orion Education & Training	Clearwater	Toi 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. Thomson	dthomson@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	DSeward@smokyhill.org	785-621-4414	www.smokyhill.org
Southwest Plains	Sublette	Traci Taylor	traci.taylor@sveplains.org	620-675-8804	www.svprtc.org

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Email: erate@ksde.org

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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).

Today



Mar 2025



Oct 2025

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.

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.

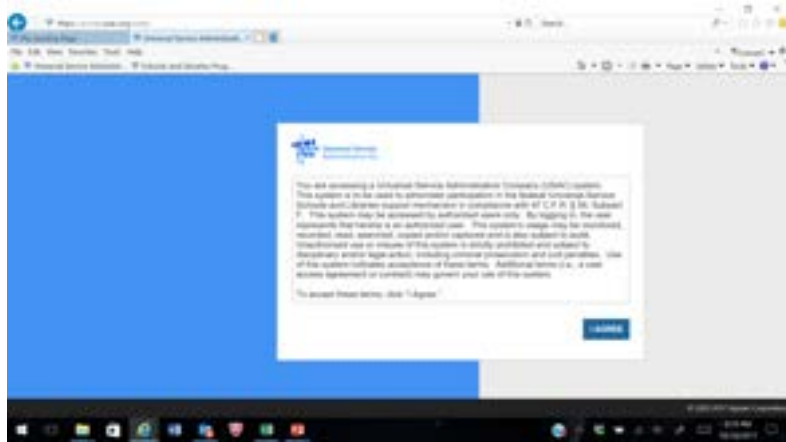
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E-Rate Process — (E-Rate in 24 30 hours / year)

- 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

EPC Portal vs SLD (USAC) Website



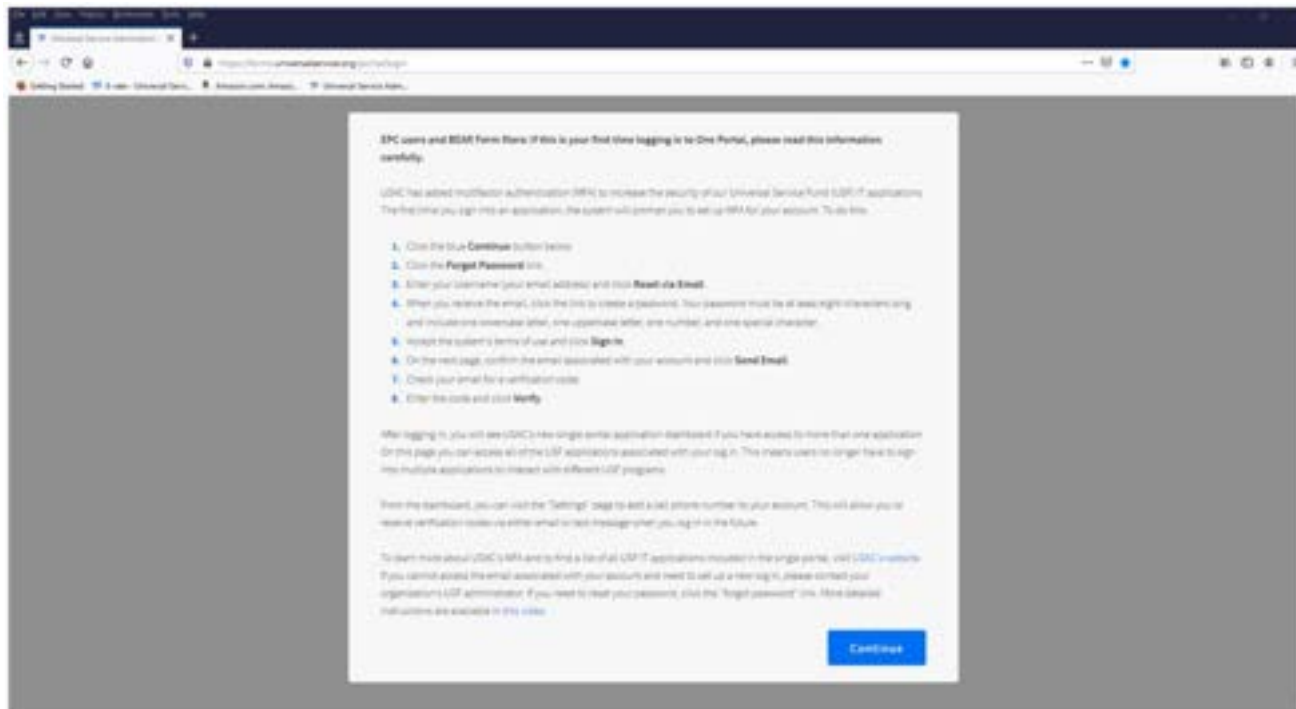
- Login Required
- Contains all info for YOUR school or district
- All Forms filed here

- 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>



One Portal – first time login

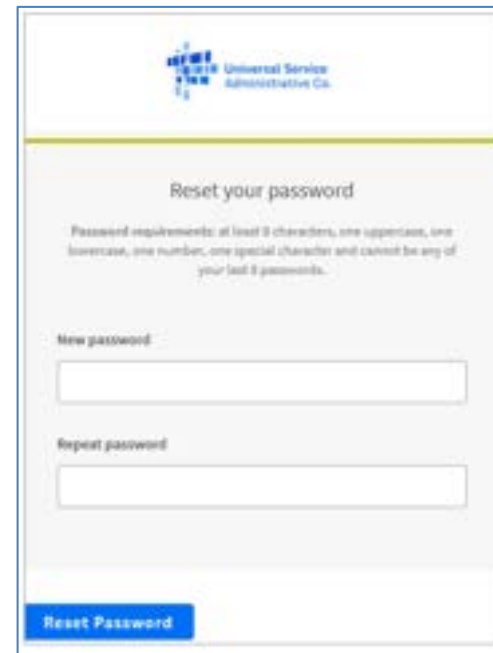
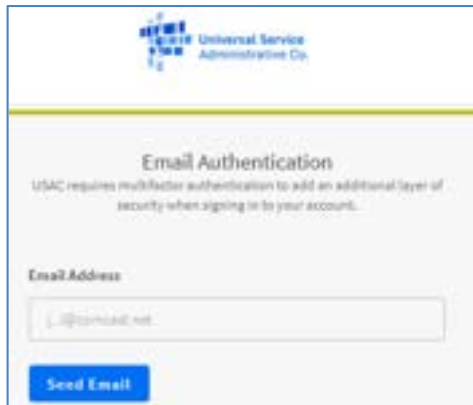
- Just click on 'Forgot password'



- 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

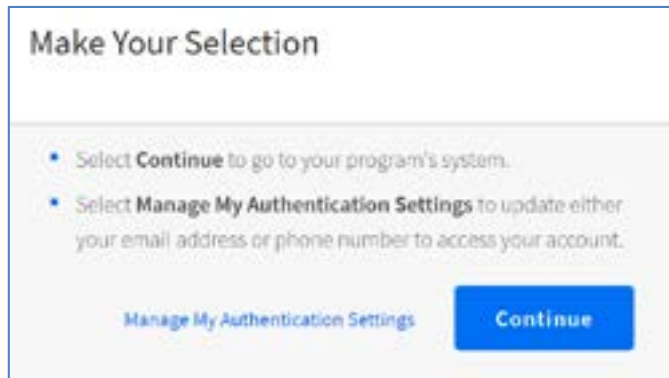
- Enter new password and verify
 - At least 8 characters
 - Upper and lower case
 - At least 1 special character
 - Cannot match any of your recent passwords



- Verify your email address and click 'Send Email'

One Portal – first time login

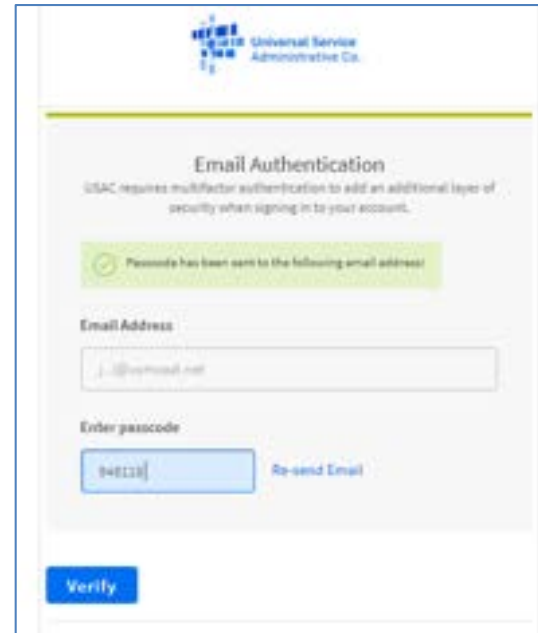
- Check your email for 6 digit passcode
- Enter passcode and click Verify



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**



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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

Enter passcode
 [Re-send Email](#)

Verify

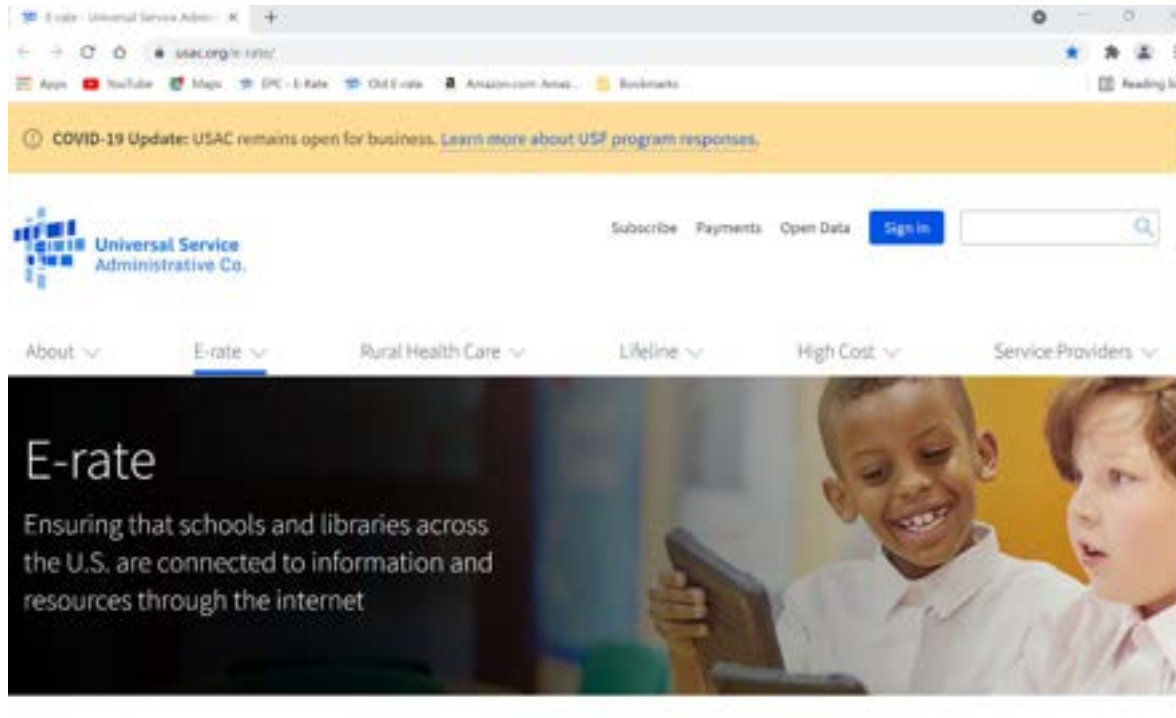
- Continue to EPC or
- You can setup phone as alternate device



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 – **ONLY if your enrollment went up. If your enrollment went down you are allowed to stay with your 2021 numbers – or just enter one number for 'District Enrollment' (bottom of main page)**

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

471												
FRN	Application Number	Service Provider Name	Fund Year	486 Service Start Date	Last Date to Invoice	Cmntd Total Cost	Cmntd Disc	Cmntd Funding Request	Invoicing Mode	Total Authorized Disbursement	Status	
2499004569	241004930	CIRBN LLC	2024	07/01/24	10/28/2025	\$ 13,636.56	60%	\$ 8,181.94	NOT SET			
2499004574	241004930	CIRBN LLC	2024	07/01/24	10/28/2025	\$ 9,000.00	60%	\$ 5,400.00	NOT SET			
2499035866	241004947	Kajeet, Inc.	2024	07/01/24	1/28/2026	\$ 15,999.20	60%	\$ 9,599.52	SPI	\$ 503.16		
Total Cat1						\$ 38,635.76		\$ 23,181.46		\$ 503.16		
Total 2024						\$ 38,635.76		\$ 23,181.46		\$ 503.16		
2399000739	231001693	CIRBN LLC	2023	07/01/23	10/28/2024	\$ 13,636.56	60%	\$ 8,181.94	NOT SET		Need Invoices for BEAR	
2399000746	231001693	CIRBN LLC	2023	07/01/23	10/28/2024	\$ 9,000.00	60%	\$ 5,400.00	NOT SET		Need Invoices for BEAR	
Total Cat1						\$ 22,636.56		\$ 13,581.94		\$ -		
2399000803	231001764	Heart Technologies.	2023	07/01/23	1/28/2025	\$ 110,176.03	60%	\$ 66,105.62	BEAR	\$ 66,105.62	Completed	
2399000825	231001764	Heart Technologies.	2023	07/01/23	1/28/2025	\$ 430,568.62	60%	\$ 258,341.17	BEAR	\$ 258,341.17	Completed	
Total Cat2						\$ 540,744.65		\$ 324,446.79		\$ 324,446.79		
Total 2023						\$ 563,381.21		\$ 338,028.73		\$ 324,446.79		
2299015975	221013177	CIRBN LLC	2022	07/01/22	10/30/2023	\$ 13,636.56	60%	\$ 8,181.94	BEAR	\$ 8,181.94	Completed	
2299015978	221013177	CIRBN LLC	2022	07/01/22	10/30/2023	\$ 9,000.00	60%	\$ 5,400.00	BEAR	\$ 5,400.00	Completed	
Total Cat1						\$ 22,636.56		\$ 13,581.94		\$ 13,581.94		
Total 2022						\$ 22,636.56		\$ 13,581.94		\$ 13,581.94		
2199005901	211005382	CIRBN LLC	2021	07/01/21	2/27/2023	\$ 9,000.00	60%	\$ 5,400.00	BEAR	\$ 5,400.00	Completed	
2199005903	211005382	CIRBN LLC	2021	07/01/21	2/27/2023	\$ 13,636.56	60%	\$ 8,181.94	BEAR	\$ 8,181.94	Completed	
Total Cat1						\$ 22,636.56		\$ 13,581.94		\$ 13,581.94		
Total 2021						\$ 22,636.56		\$ 13,581.94		\$ 13,581.94		
2099002425	201002626	CIRBN LLC	2020	07/01/20	2/25/2022	\$ 9,000.00	60%	\$ 5,400.00	BEAR	\$ 5,400.00	Completed	
2099018678	201002626	CIRBN LLC	2020	07/01/20	2/25/2022	\$ 13,636.56	60%	\$ 8,181.94	BEAR	\$ 8,181.94	Completed	
Total Cat1						\$ 22,636.56		\$ 13,581.94		\$ 13,581.94		
2099028861	201002628	Graybar Electric Co	2020	07/01/20	1/28/2022	\$ 32,774.12	60%	\$ 19,664.47	SPI	\$ 19,664.47	Completed	
2099028862	201002628	Heart Technologies.	2020	07/01/20	5/31/2022	\$ 24,957.92	60%	\$ 14,974.75	BEAR	\$ 14,974.75	Completed	
2099042046	201002628	Heart Technologies.	2020	07/01/20	5/31/2022	\$ 14,593.26	60%	\$ 8,755.96	BEAR	\$ 8,755.96	Completed	
Total Cat2						\$ 72,325.30		\$ 43,395.18		\$ 43,395.18		
Total 2020						\$ 94,961.86		\$ 56,977.12		\$ 56,977.12		



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

<i>Verify Portal Information</i>	<i>NOW</i>
<i>Plan & File Form 470</i> <i>Assess Technology Needs / Budgets</i> <i>Gather Discount Information</i>	<i>Oct - Nov</i>
<i>Develop Competitive RFPs (if required)</i>	<i>Nov - Dec</i>
<i>Advertise</i> <i>Vendor Conference(s)</i> <i>Vendor Responses Received</i>	
<i>System / Vendor Selection</i> <i>Board Approvals</i> <i>Contract Negotiation</i>	<i>Dec - Jan</i>
<i>Final Contracts Signed</i>	<i>Jan</i>
<i>Forms Submission to SLD (Form 471)</i>	<u><i>Feb/Mar 2025</i></u>
<i>Implementation (Form 486 / 500 / 472)</i>	<i>July – June</i>

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

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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) 2025

Draft Eligible Services List 2025



PUBLIC NOTICE

Federal Communications Commission
45 L Street NE
Washington, DC 20554

News Media Information 202 / 418-0500
Internet: <https://www.fcc.gov>

DA 24-743

Released: July 31, 2024

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

WC Docket No. 13-184

Comment Date: August 30, 2024
Reply Comment Date: September 16, 2024

Changes from 2023 – **WiFi on School Buses and Hotspots**

E-Rate Eligibility - What's Covered

- **Category 1 – no budget limit – technology neutral**
 - Data Transmission (WAN Services)
 - *Internet Access – now including School Bus WiFi and offsite Hotspots*
- **Category 2 - \$167/student ~~2021–2025~~ 2025 (final year – new Cat2 budget in 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

Available for Public Use

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 2025 – 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 2025 – 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 2025 – Cat1 – Bus WiFi

Available for Public Use

School Buses: Competitive Bidding

- —School bus Wi-Fi is subject to all existing E-Rate rules and requirements, including those related to competitive bidding, cost allocation, and discounting rules.
- Applicants who entered into multi-year agreements for Bus Wi-Fi in the Emergency Connectivity Fund (ECF) program are **not exempt** from competitive bidding requirements.
- The competitive bidding exemption for Commercially Available Business Class Internet Option (CABIO) services **does not apply to bus services**. It only applies to services delivered to a school or library building.
- Service provider selection must be consistent with E-Rate program rules including selecting the most cost-effective service offering(s), using **price of the eligible equipment and services as the primary factor** in the evaluation matrix.

Eligible Services 2025 – Cat1 – Bus WiFi

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School Buses: Restrictions on Usage

- Equipment and services must primarily be utilized for **educational purposes** as defined by E-Rate rules.
- There are no new user or Children's and Internet Protection Access (CIPA) restrictions adopted for Bus Wi-Fi. All restrictions must be consistent with those placed on building-based broadband networks.
- Wi-Fi should **only be active during school bus normal operating hours** (i.e., when students are being transported to and from school or school-related activities) or when there is a **clear educational purpose** for enabling school bus Wi-Fi connections outside of these hours. Bus Wi-Fi service must be disabled outside of these hours and cannot be utilized for community purposes.
- Security cameras for buses are ineligible for E-Rate support.

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Eligible Services 2025 – Cat1 – Hotspots

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Wi-Fi Hotspots: E-Rate Eligible

- **Wi-Fi hotspot:** a device that is intended to **provide Wi-Fi connectivity to a hotspot user as its sole function.**
- Wi-Fi hotspots will be **eligible as Category One (C1) network equipment** necessary to make C1 wireless Internet services functional.
- Wi-Fi hotspot funding requests limited to fixed, **three-year budget cycle.** First cycle funding years (FY) 2025 – FY 2027.
- Off-premises **Wi-Fi hotspots equipment** and **mobile wireless Internet services** requests will be prioritized *after* on-premises Category 1 and 2 equipment and service requests, in the event demand exceeds available funding.

File on separate Form 471 – same for BusWiFi

Eligible Services 2025 – Cat1 – Hotspots

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Eligible Equipment and Services

- **To be E-Rate eligible, Wi-Fi hotspots must:**
 - Be portable.
 - Be a single device (i.e., not a set of linked devices).
 - Be for use with a commercially available mobile wireless Internet service.
- **What is NOT eligible for E-Rate funding:**
 - Multi-functional devices (e.g., smartphones, PCs, notebooks, tablets, customer premises equipment, routers or switches, and wireless access points, etc.).
 - Wireless services delivered to any broadband-enabled end user devices (e.g., laptops, tablets), fixed wireless connections and the related equipment, private 5G/LTE networks, fiber, and network expansion or construction.
- In addition, 1:1 Wi-Fi hotspot initiatives are not allowed, and each Wi-Fi hotspot must have an associated line of service to be eligible for E-Rate funding. Wi-Fi hotspots may not be warehoused/stored for future use or as replacements for lost, damaged, or stolen Wi-Fi hotspot devices.



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[SLD FAQ's on Hotspots 10-14-24](#)

Eligible Services 2025 – 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 2025

- Every Billed Entity will have a Cat2 Budget of \$167/student for the period from 2021-2025
- The Funding Floor (per school minimum) is \$25k
- 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 \$167,000.00 and the discount you receive is \$ 83,500.00



E-Rate Category 2 for 2025

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
Lincoln Trail Elem School	72264	102 E State St	Mahomet	Rural	739	739	153
Mahomet-Seymour High School	72263	302 W State St	Mahomet	Rural	956	956	159
Mahomet-Seymour Jr High School	72265	201 W State St	Mahomet	Rural	736	736	170
Middletown School	72266	101 N Division St	Mahomet	Rural	807	807	170
Sangamon Elementary School	72267	601 W Main St	Mahomet	Rural	0	0	0
				Enrollment	3238	3238	652
				Discount	60%		
Mahomet Transportation	16023154	101 North Division	Mahomet				
Mahomet-Seymour Admin Building	16030543	101 North Division	Mahomet				
	Per EPC 06-25-24						
Cat2 Budget 2021	\$ 540,746.00						
Cat2 Awarded 2021	\$ -						
Cat2 Awarded 2022	\$ -						
Cat2 Awarded 2023	\$ 540,744.65						
Cat2 Awarded 2024							
Cat2 Available 2025	\$ 1.35						

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%

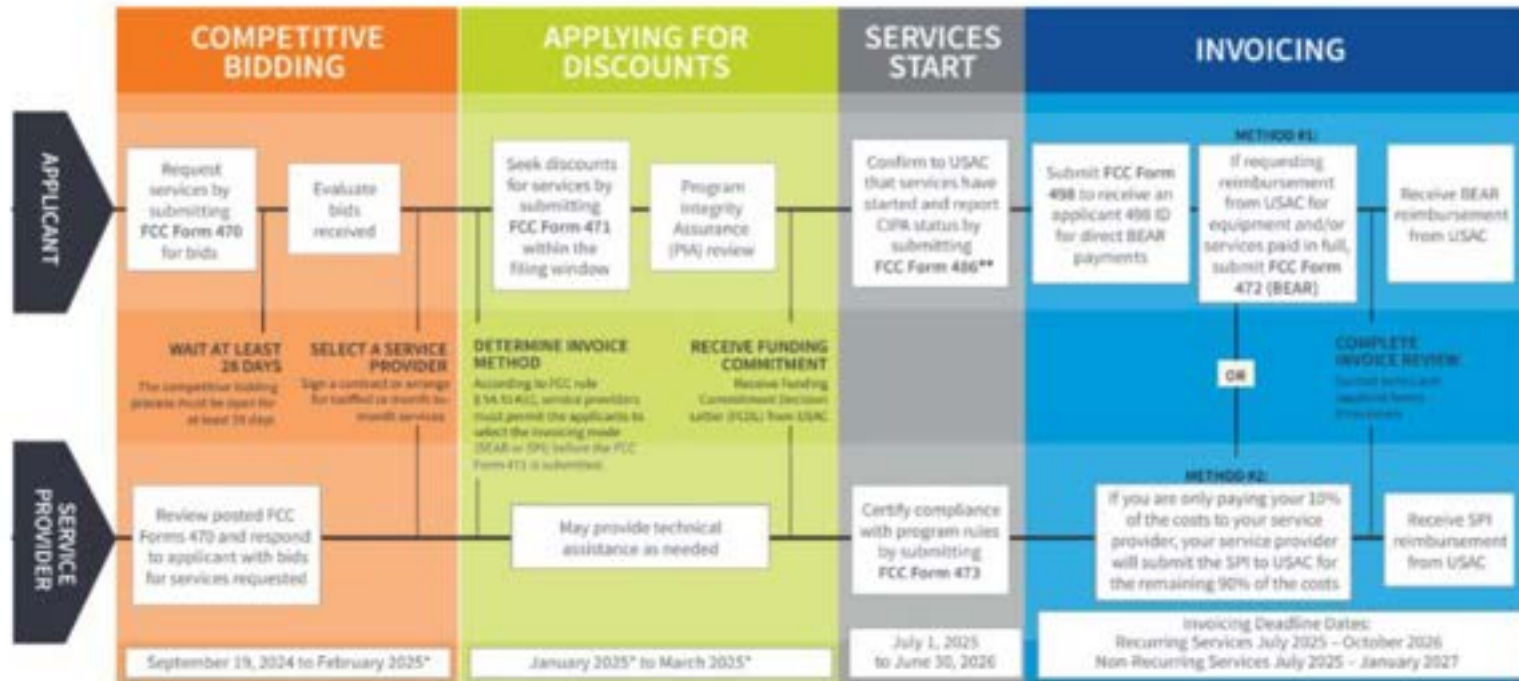
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Calculating Discounts - two variables

- 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>

Applying for E-Rate Form 470

The E-Rate Application Process: FY2025



470

471

486

472 (BEAR) OR 474 (SPI)

and are subject to change.

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
 - **Special / New menus for Hotspots, BusWiFi**

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.*

E-Rate Form 470 – 28 Day Rule

Allowable Contract Date Infographic

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 ²	30	1	2
Day 26	Day 27	Day 28	Day 29			

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.

¹This is the earliest you can select a vendor.
²You can wait up until you certify FCC Form 471 to select a vendor.³

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 Item 21 level pricing and descriptions.
 - ***Responses must be received 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

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FY 2025 FCC Form 470 Updates (Available September 19, 2024)

- Adding "Mobile Service for Use on Buses"
 - Can be found under: "I seek bids for internet access and/or data transmission service."
- Adding "School Bus Wi-Fi Network Equipment"
 - Can be found under: "I seek bid for Category One network equipment or maintenance operations."
- Adding "I seek bids for wireless Internet services that can be delivered with a Wi-Fi hotspot for off-premises use."
 - Can be found under: "I seek bids for Internet access and/or data transmission service."
- Adding "I seek bids for Wi-Fi hotspots for off-premises use."
 - Can be found under: "I seek bids for Category One network equipment or maintenance and operations."
- To learn how to file the FCC Form 470 to request Wi-Fi on school buses or Wi-Fi hotspots for off-premises use, visit our [webpage](#).

E-Rate Form 470

More Changes to Form 470 for 2025

- 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 2025

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 10895 1 Pine Street Rockville, MD 20850 012-345-6789 school_dist_10895@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 # Att#	Cat	Description	2023 FRN	2024 FRN	Vendor	SPIN	Total Pre-Discounted Amount	% Disc	Total E-Rate Funding	Total District Funding	2024 Notes
1.1	471#	Internet	Dedicated Internet	2399000739	CIRBN LLC	143036797	\$ 13,636.56	60%	\$ 8,181.94	\$ 5,454.62	25gb/sec at \$1,136.38/mo -thru 2026
1.2		Internet	Data Transmission	2399000746		143036797	\$ 9,000.00	60%	\$ 5,400.00	\$ 3,600.00	Leased Lit Fiber ES-HS -no 470 - Contract thru 2028
Total Cat1							\$ 22,636.56		\$ 13,581.94	\$ 9,054.62	
2.1	471#	Int Conns	Cabling and Closet Upgrades	2399000825	Heart Technologies, Inc.	143007515	\$ -	60%	\$ -	\$ -	
2.2		Int Conns	Switch Upgrades	2399000803		143007515	\$ -	60%	\$ -	\$ -	
Total Cat2							\$ -		\$ -	\$ -	
Total This Year							\$ 22,636.56		\$ 13,581.94	\$ 9,054.62	

[Project Tracking Example 2023](#)

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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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						
<i>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.</i>						
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					
<i>Use Item Descriptions from Form 470</i>	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	CRBN	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 \(EPC Website\)](#)

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 2025](#)

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

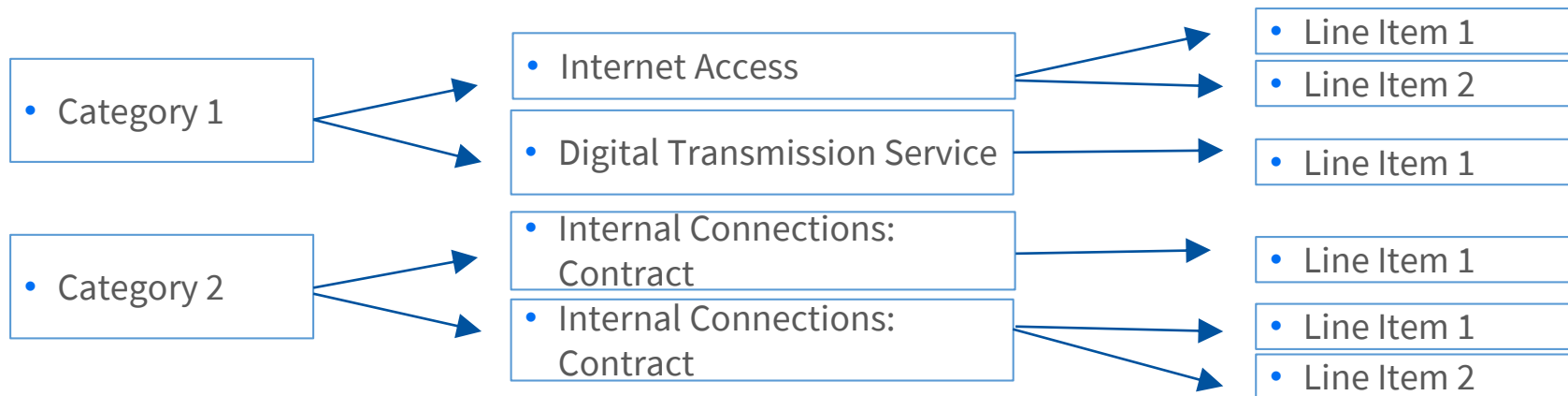
- File one per category of service

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.

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.



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 02 Cat1 Bus WiFi 2024
Funding Year 2024

Application Number 241004947
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

Don Dietrich
314-378-1667
ddietrich@btu-consultants.com

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

[Example Form 471](#)



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 Form 486
MS 486 01 Cat1 2024 - #343959

Summary | Associated FRNs | Review Inquiries | News | Related Actions

In-Review | Outreach | Review Completed | Notification Issued

▼ FCC Form 486 Form Details

View Status (+)

Funding Year 2024

Submitting Organization MAHOMET SEYMOUR C U SCH DIST 3 (BEN: 136287)
Created By Don Detrich
Created On 5/7/2024 11:42 AM EDT

▼ Billed Entity Information

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

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

▼ Main Contact

Name: Don Detrich
Phone Number: 214 378 1667
Email: ddetrich@btu-consultants.com

▼ Service Information

FRN Number	Application Number	FRN Nickname	Category of Service	SPIN	Service Provider	Actual Service Start Date
2699001574	241064930	Fiber to HS 2024	Category 1	143036797	ORBN LLC	7/1/2024
2699004569	241064930	ORBN Incomet 2024	Category 1	143036797	ORBN LLC	7/1/2024
2699035866	241064947	School Bus W/P 2024	Category 1	143084849	Kajeet, Inc.	7/1/2024

Certifications

BEAR Process

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

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 499 | FCC Form 471 | FCC Form 486 | Appeal | Manage Users | Manage Organizations | USAC Website | Contact Us | Help

USAC O&M EAT
Welcome, USAC Independent Library 1 **Click name**

Notifications

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

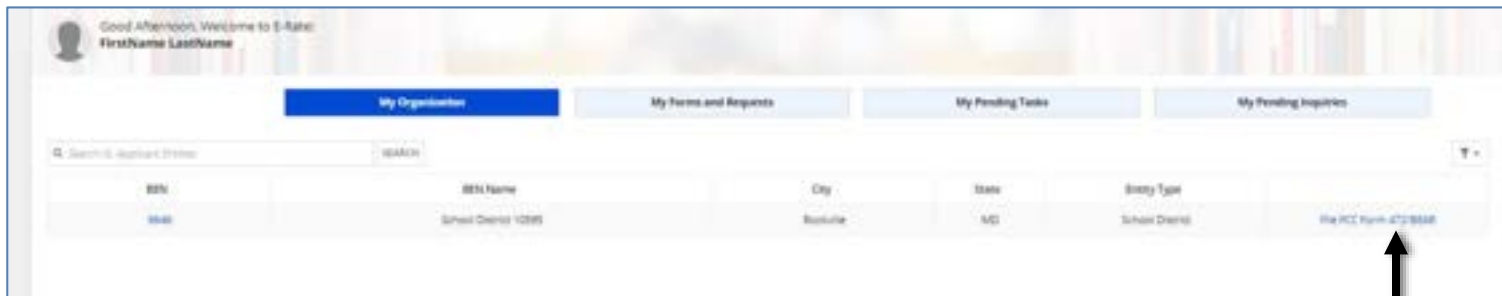
Notification	Description	Issued Date	Generated By	Generated On
No items available				

My Entities

- 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 records for which you have received E-Proc 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 is quoted this information in the future. This is simple to use mandatory or intended to serve any other purpose than to respond to requests for guidance.

BTU App Number	Year	Applicant Name	DOB	Fund Type	Category of Service	Equipment Description	Serial	Make & Model	Date of Purchase	USAC Invoice #	Invoice Date	Original Location	Current Location	Acquisition Cost (E-Proc)	Current Value	Est. Useful Life	Notes
00000	2020	Little Red School House SD	9801	500	General	Printer	12345678	HP Color LaserJet Pro MFP E85500	11/18/20	00000	11/18/20	Little Red School House SD	Little Red School House SD	1,400.00	1,200.00	3	
00001	2020	Little Red School House SD	9801	500	General	Desk	87654321	Steel	11/18/20	00000	11/18/20	Little Red School House SD	Little Red School House SD	1,200.00	1,000.00	3	This is reported as a part of an additional purchase order 11/18/20
00002	2020	Little Red School House SD	9801	500	General	Chair	11111111	High Back Office Chair	11/18/20	00000	11/18/20	Little Red School House SD	Little Red School House SD	22,000.00	1,800.00	3	This has reported as a part of an additional purchase order 11/18/20
00003	2020	Little Red School House SD	9801	500	General	Table	22222222	Table	11/18/20	00000	11/18/20	Little Red School House SD	Little Red School House SD	22,000.00	1,800.00	3	
00004	2020	Little Red School House SD	9801	500	General	Chair	33333333	Chair	11/18/20	00000	11/18/20	Little Red School House SD	Little Red School House SD	22,000.00	1,800.00	3	
00005	2020	Little Red School House SD	9801	500	General	Chair	44444444	Chair	11/18/20	00000	11/18/20	Little Red School House SD	Little Red School House SD	22,000.00	1,800.00	3	

Additional information to keep in mind:

- Label all equipment with P/N and EIT
- Keep a schematic/wiring diagram of all equipment and the location in the building(s) including drop/wall ports
- Monitor location of equipment for at least 3 years
- Keep maintenance records for all equipment for how long, 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 12/2021

Category 2 Equip Moves – as of July 1, 2021

Available for Public Use

Category Two Budgets - First Full Budget Cycle (FY2021-FY2025)

Additional differences from the test period (continued)

- School districts and library systems can transfer equipment between schools within a school district and libraries within a library system.
 - No longer required to notify USAC of these equipment transfers.
 - Transferor and recipient must maintain detailed records documenting the transfer and the reason for the transfer for at least five years.
 - Schools, libraries, and consortia must maintain asset and inventory records of equipment purchased and the actual locations of such equipment for at least 10 years after purchase.
- School districts and library systems must wait until July 1, 2021 to transfer equipment that is less than three years old if they do not want to be subject to the requirement to notify USAC of the transfer.



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 retail 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

Audits – *they're still here...*

- BCAP (Beneficiary and Contributor Audit Program)
 - Full on-site audit – randomly selected – covers one funding year (all FRNs) - lasts weeks – involves your accounting and legal folks
- PQA (Payment Quality Assurance)
 - Nobody onsite – randomly selected – very common – covers one invoice payment – handled via email.

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



FY 2025 Window

471 Filing Window:

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:

<http://www.eratecentral.com/>

SLD Home Page:

<https://www.usac.org/e-rate/applicant-process/>



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