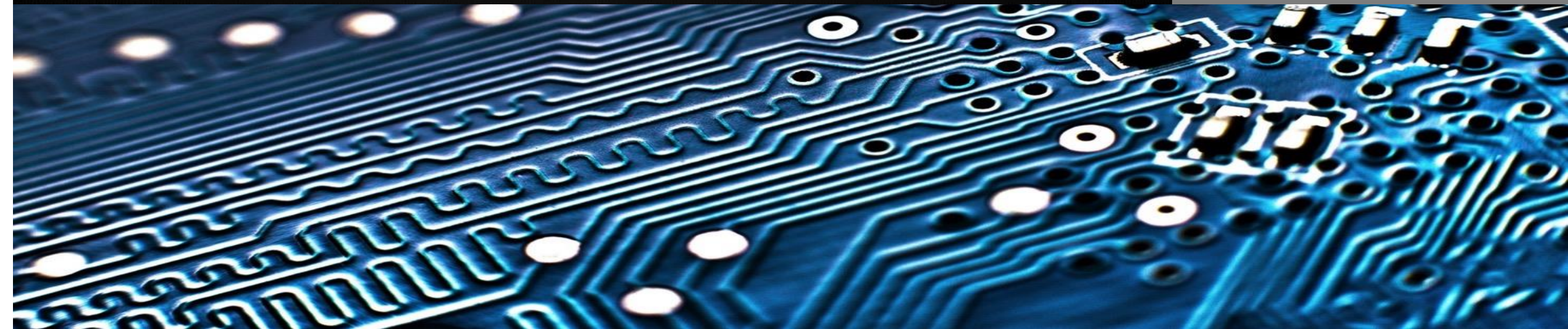
A decorative header featuring white, paper-cut style clouds against a grey gradient background.

The logo of the University System of Georgia, featuring a classical building facade within a circular border containing the text "BOARD OF REGENTS OF THE UNIVERSITY SYSTEM OF GEORGIA".

UNIVERSITY SYSTEM OF GEORGIA
Information Technology Services

E-rate Basics

FY2017



What is E-rate?



What is E-rate?

- Federal program overseen by FCC, run by USAC
- \$3.913 billion cap, plus unspent \$ from prior years
- Provides discounts ranging from 20-90% on C1 (broadband, internet and voice services) and 20-85% on C2 (internal connections equipment)
- All services/equipment must be competitively bid on USAC website
- Funding years based on first day of funding
 - FY 2017 = July 1, 2017 – June 30, 2018
 - FY 2016 = July 1, 2016 – June 30, 2017



What is EPC?



What is EPC?

- EPC stands for > E-rate Productivity Center
- New account and application management portal
- All E-rate forms, letters and interactions will be phased into EPC
- You **MUST** be in EPC to apply for E-rate



Establishing your EPC Account

- USAC created EPC account for each applicant and identified an Account Administrator (person who signed FY2015 Form 471)
 - One AA per Billed Entity
- The AA can perform these functions:
 - Create Users
 - Assign Users' Rights/Permissions
 - Change AA to another user
 - Join Consortia
 - Link to Your Consultant
 - Enter Enrollment/NSLP Data



Need an EPC account?

- Contact USAC at **888-203-8100** and ask:
 - Has your EPC account been created?
 - Who is the AA that was established for your entity's account?
 - Has the AA logged in and accepted the Terms and Conditions?
- If you need to change AAs, USAC can help you with this



Accessing EPC...



Search

SCHOOLS AND LIBRARIES (E-RATE)

[EPC LOG IN](#) | [MAKING PAYMENTS](#) | [FORMS](#) | [TOOLS](#)

[USAC Home](#) | [Schools and Libraries Program](#) | [Apply for E-rate](#)

ABOUT THE PROGRAM

- [Getting Started](#)
- [Eligible Services List](#)
- [Document Retention](#)
- [Appeals & Audits](#)
- [Glossary of Terms \(PDF\)](#)
- [FAQs](#)

RESOURCES & TOOLS

- [Apply for E-rate Forms](#)
- [Blog: File Along with Me](#)
- [Reference Area](#)
- [Search Tools](#)
- [Latest News](#)
- [Samples & Examples](#)
- [Trainings & Outreach](#)
- [Submit a Question](#)

APPLICANT PROCESS

APPLY FOR E-RATE

[FY2016 Filing Window](#)

[EPC Maintenance Schedule](#)

Welcome to the E-rate Program! This program provides discounts for Wi-Fi, high-speed broadband, and telecommunications services for schools and libraries throughout the country. There are four steps to receive funding:

- Request bids for service,
- Apply for funding,
- Start receiving services, and
- Invoice USAC.

View the [application process flowchart](#) to keep track of where you are in the process.

[We're here to help!](#) If you need assistance at any step of the process, please feel free to contact us.

Service providers should see our section on [E-rate for Service Providers](#).

One: Request Bids for Service (FCC Form 470)

SERVICE PROVIDER PROCESS

Returning user?

Log in to the E-rate Productivity Center (EPC) to access your forms and messages.

New users should call us at (888) 203-8100 to set up an account in EPC.



Updating Your EPC Account

- Click on Billed Entity (first entity on the Organization list) > Related Actions in left toolbar
- Then perform these functions:
 - Establish other users and assign permissions (if any)
 - Users must create password and accept the terms and conditions
 - Review your “My entities” list on your Landing Page to ensure all buildings are listed
 - Add missing entities by creating a customer service case with USAC
 - Ensure that the addresses are accurate for each building, as well as the “profile” information for each entity
 - Join a consortium, if applicable
 - Link to a consultant, if applicable
 - Update your enrollment/NSLP data
 - Wait until FY2016 PIA is complete

What's my discount?



School District Discount Calculation

- All schools in the school district get the district discount, even if they apply individually or are the only recipient of service.
- Independent schools, not part of a district, calculate their discounts based on their own student population.
- Independent schools, not part of a district, determine urban/rural status based on their own physical address.



School District Example

- School District A (10 schools)
 - Total student population 3,000 students
 - Total students eligible for NSLP = 1,000 students
 - All but one of the schools are located in urban areas, so district = urban
 - $1,000 \text{ students eligible for NSLP} / 3,000 \text{ students} = 33\%$ eligible

School District Example

- School District A

	Category one schools and libraries discount matrix		Category two schools and libraries discount matrix	
	Discount level		Discount level	
% of students eligible for National School Lunch Program	Urban discount	Rural discount	Urban discount	Rural discount
< 1.....	20	25	20	25
1-19.....	40	50	40	50
20-34.....	50	60	50	60
35-49.....	60	70	60	70
50-74.....	80	80	80	80
75-100.....	90	90	85	85

What is eligible?



What's Eligible for Category 1?

Category 1 (to the building):

- **Telecommunications/broadband services**
 - Lit leased fiber and Leased dark fiber
 - Ethernet
 - T-1 lines
 - Cable modem/DSL service
 - Purchase of dark fiber
- **Internet access**
 - Can include Internet and transport charges
 - Filtering is not eligible
- **Voice services** (being phased out by 20%/year)
 - PRIs, VOIP, local, long distance, cellular voice – eligible
 - Data plans, DID blocks, special calling features – not eligible
 - Only exceptions for mobile data plans are for bookmobiles, or where you can prove that they are more cost effective than installing WIFI in the library

Voice Phase Out Schedule

If Your Entity's Discount is (in a given year):	Voice Discount Will Be:				
	FY 2015	FY 2016	FY 2017	FY 2018	FY 2019
20%	No Funding	No Funding	No Funding	No Funding	No Funding
25%	5%	No Funding	No Funding	No Funding	No Funding
40%	20%	No Funding	No Funding	No Funding	No Funding
50%	30%	10%	No Funding	No Funding	No Funding
60%	40%	20%	No Funding	No Funding	No Funding
70%	50%	30%	10%	No Funding	No Funding
80%	60%	40%	20%	No Funding	No Funding
90%	70%	50%	30%	10%	No Funding

What's Eligible for Category 2?

Category 2 (inside the building):

- **Internal connections**
 - Wireless equipment (WAPs/controllers)
 - Internal wiring
 - Routers, switches
 - Firewalls, racks, UPS (to support eligible equip)
 - Caching servers (this is the only eligible server)
- **Basic maintenance of eligible IC**
 - Warranties with separate cost are not eligible
- **Managed internal broadband services**
 - Paying an outside vendor to own/maintain the equipment
 - Paying an outside vendor to maintain library-owned equipment

What is a Category 2 Budget?



Category 2 Budgets

- School budgets are \$150 per student **PRE-DISCOUNT** based on the count of full time and part time students at that school with a floor of \$9,200.
- This is a five-year budget that you can choose to use all in one year or spread out
- Non-instructional facilities (NIFs) – including school NIFs with classrooms and administrative buildings – do not have Category Two budgets.
- Districts or library systems may not average their costs across multiple school or library budgets.

Category 2 Funding Budget Example

- Red School District qualifies for a 50% discount rate.
- There are 1,000 students in total. High School has 550 students but 10 middle school students also take advanced classes there.

School	F/T & P/T Students	Pre-discount Category Two Budget	Post-discount Category Two Budget
Red Elementary	100	$100 * 150 = \$15,000$	$\$15,000 * 0.5 = \$7,500$
Red Middle School	300	$300 * 150 = \$45,000$	$\$45,000 * 0.5 = \$22,500$
Mountain Top ES	50	$50 * \$150 = \$9,200$ (floor!)	$\$9,200 * 0.5 = \$4,600$
Red High School	560	$560 * \$150 = \$84,000$	$\$84,000 * 0.5 = \$42,000$
District Office	0	\$0 (NIFs don't qualify)	\$0 (NIFs don't qualify)

Category 2 Budgets

- C2 Budget Calculator:

<https://sltools.universalservice.org/portal-external/budgetLookup/>

<http://www.fundsforlearning.com/schoolDistCalculator.php>



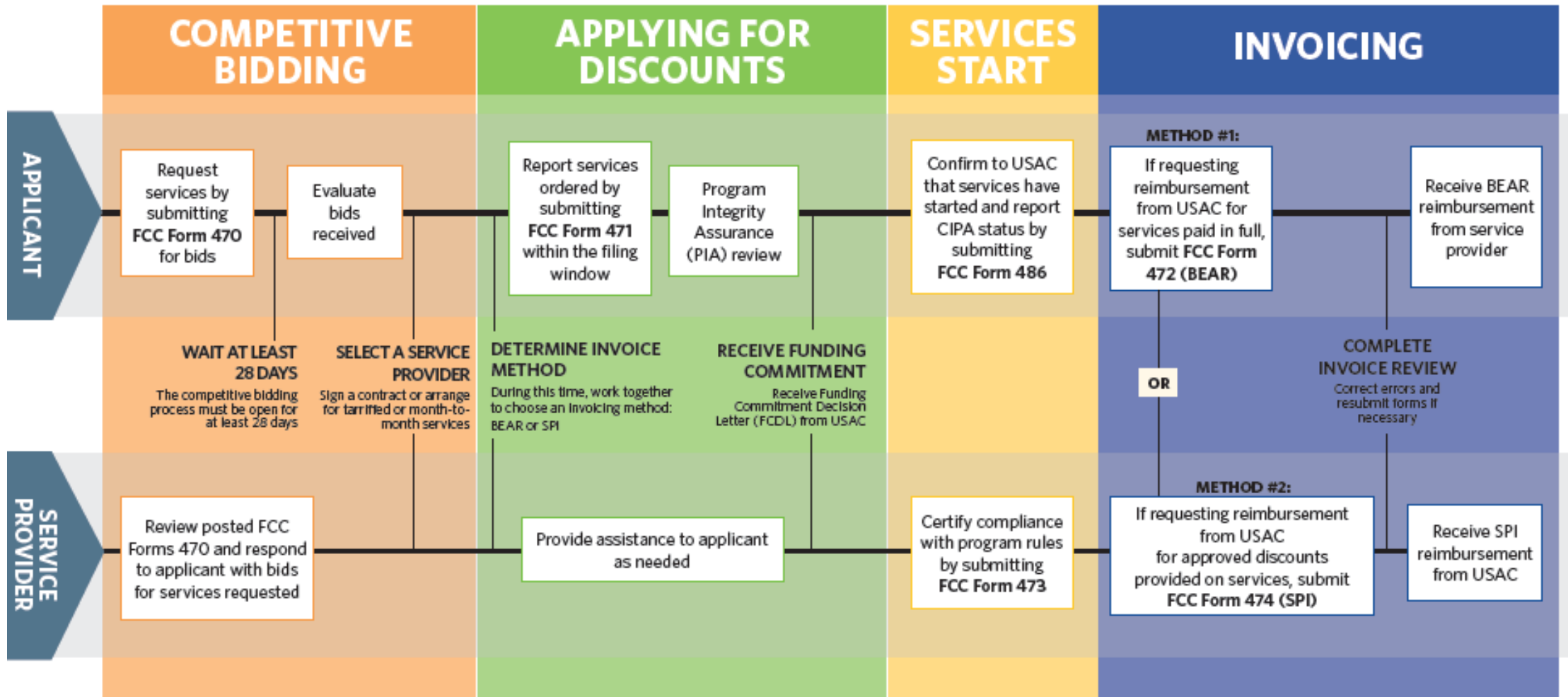
What's the process?



Application Process – 7 Easy Steps

1. Bid All Services/Equipment – **Form 470**
2. Vendor Selection/Bid Evaluation
3. Request E-rate Funding – **Form 471**
4. Application Review – **PIA**
5. Funding Commitment – **FCDL**
6. Turn on Funding/CIPA Compliance – **Form 486**
7. Submit Invoice to USAC – **Form 472 BEAR**
 - If paying invoices in full
 - Also, must submit Form 498 to provide bank routing information for reimbursements if using BEAR
 - (Vendor submits invoice to USAC if you receive discounted bills)

Application Process – 7 Easy Steps



Step 1: Posting the Form 470

Purpose of the Form 470 - opens the competitive bidding process

- Asks for descriptions of the equipment/services you are requesting
- RFPs may be used to describe specific needs and circumstances, but aren't required
- 470 may not required every year
- **Deadline:** Form 470 must be posted online at least 28 days before the Form 471 window close (example: April 15 close = March 18 deadline). File 470 by end of February, if possible

Step 2: Bid Evaluation/Vendor Selection

- After the Form 470 has been posted online, vendors submit proposals to the school or library
 - Proposals must be accepted for a minimum of 28 calendar days, but applicants may accept proposals after this date
- Vendors will contact you if they need additional information
- On 29th day after Form 470 is posted (called the Allowable Contract Date), you may conduct your bid evaluation and select a vendor
- Price of eligible services/equipment **MUST** be the most heavily weighted factor during bid evaluation

Step 2: Bid Evaluation/Vendor Selection

FACTOR	POINTS AVAILABLE	VENDOR 1	VENDOR 2	VENDOR 3
Price of the eligible products and services	30*	15	30	25
Prior experience with the vendor	20	20	0	20
Prices for ineligible services, products, and fees	25	20	15	25
Flexible invoicing: FCC Form 472 or FCC Form 474	15	0	15	15
Local or in-state vendor	10	10	8	7
TOTAL	100	65	68	92

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



Step 3: Filing the 471

Purpose of the Form 471- to request E-rate funds

- Shows discount calculations (data imported from EPC)
- Gathers contract information from EPC
- 470 #, contract signing/expiration dates, contract extensions, etc.
- Or gathers MTM/470 information if no contract
- Asks detailed questions about services or equipment (Item 21)
- Asks which entities (buildings) are receiving the service/equipment (recipients of service)
- **471s are required every year!**

When and How Many to File

- 471 Application Window: Usually runs January – March
 - Be sure to leave enough time for your 470 to be posted at least 28 days
- Can file a single 471 for all C1 requests or multiple
- Must separate C1 and C2 requests on different 471s
- Must be filed in EPC



Step 4: PIA Review

Purpose of Program Integrity Assurance (PIA) - Checks for rule compliance

- Most applicants receive PIA questions regarding:
 - eligible services
 - eligible entities
 - appropriate discount
- Applicants have 15 days to respond
 - Can request a 7 day extension
- PIA is not handled in EPC

Step 5: SLD Issues FCDL

Purpose of FCDL = Funding Commitment Decision Letter - Tells you how much money was committed

- Delivered in EPC (not mailed)
- 471 contact will receive an email notification of FCDL
- Tells you which funding requests are approved or denied and how much \$\$
- If you don't agree with funding decision, file an appeal
 - **Must file within 60 days**
 - Appeal to SLD if they made an error
 - Can then appeal to the FCC if USAC denies
 - Appeal to FCC for waivers and policy issues

Step 6: Filing the Form 486

Purpose of Form 486 - signifies that it's OK for SLD to pay any invoices for that FRN, AND certifies CIPA compliance

- **Deadline:** Must be certified no later than:
 - 120 calendar days after the Service Start Date featured on the Form 486 or
 - 120 calendar days after the date of the Funding Commitment Decision Letter whichever is later
 - Will be done in EPC
 - USAC then issues the Form 486 Approval Letter to vendor and applicant
 - Letter will be in EPC for FY2017

Step 7: Receiving E-rate Funding!

The Invoicing Method is the Applicant's choice

SPI – vendor provides discounts on bills then vendor invoices USAC

- Applicants do nothing except make sure they are receiving the discounts they deserve on bills

or

BEAR – applicant pays bills in full then invoices USAC for reimbursement

- Applicant submits Form 472 – BEAR Form for reimbursement (Can invoice monthly, quarterly, semi-annually, or at end of year)
- Must select one or the other for entire year

What should you be doing now?



What Should You Be Doing Now?

FY2016

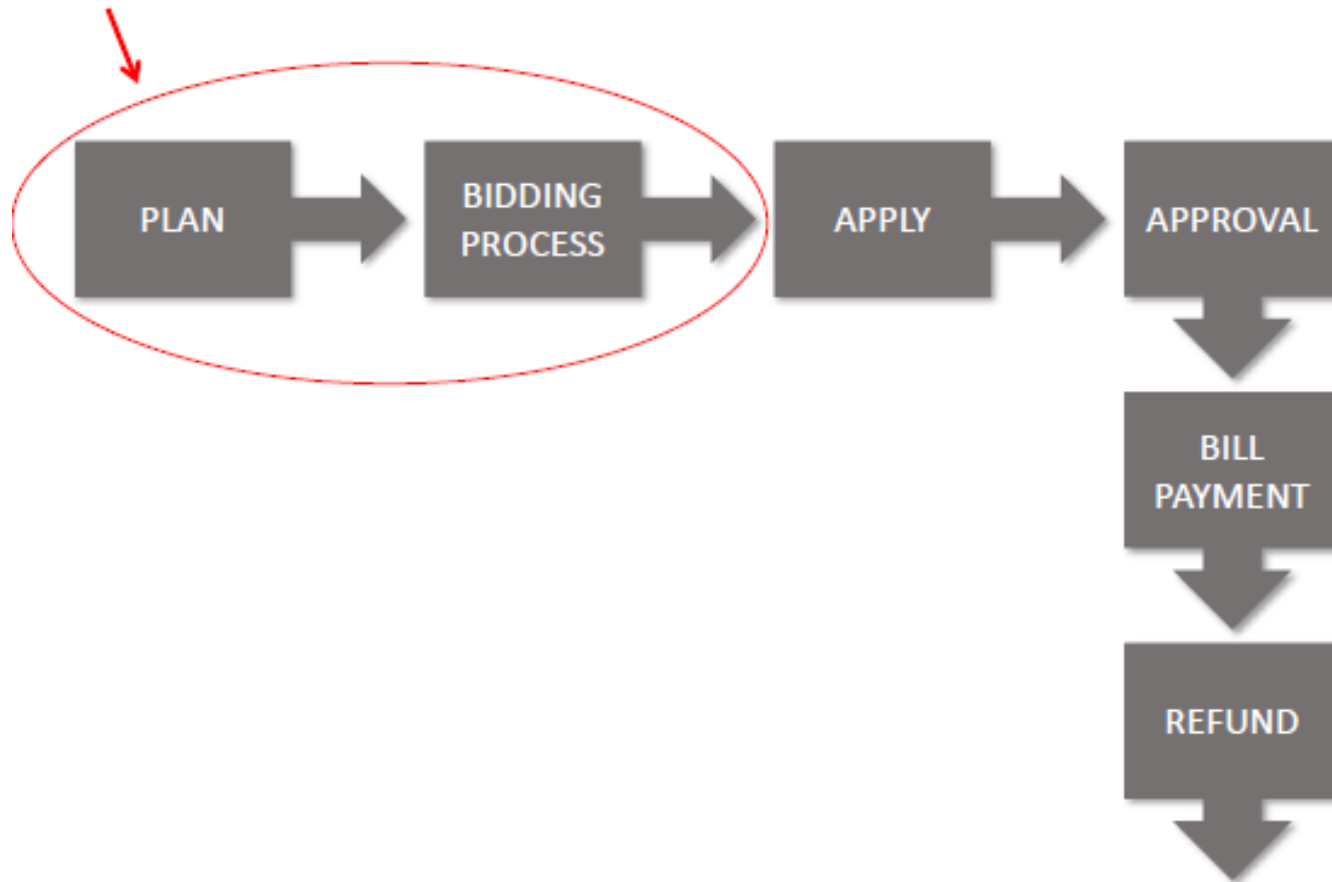
- Wave 13 for FY 2016
 1. Check EPC to see if you have been funded
 2. Don't forget to file a Form 486 in EPC

FY2017

- What do you need to apply for in FY2017?
 - 1) Set up your EPC Portal
 - 2) Decide what services/equipment you will need for FY2017
 - 3) File Form 470 to competitively bid the services or equipment
 - No need to file 470 if your services are covered under a multi-year contract
 - Wait 28 days, evaluate bids, award/sign contracts
 - 4.) Form 471 deadline likely to be mid-late March

What Should You Be Doing Now?

You Are Here



Questions?



USAC Client Service Bureau (CSB) **888-203-8100**

- 'Submit a Question' on SLD website
- Contact USAC from your EPC Portal

Ga E-rate Team

- Gae-rate@usg.edu
- www.gae-rate.usg.edu

Want More E-rate Training?

- USAC trainings and tutorials available at:
<http://www.usac.org/sl/tools/e-rate-productivity-center/default.aspx>
- Ga E-rate training videos and step-by-step instructions at:
http://www.gae-rate.usg.edu/erate_toolbox



Helpful Links

- [Schools & Libraries Website](#)
- [EPC Login](#)
- [E-rate Forms](#)
- [USAC Search Tools](#)
- [Eligible Services List](#)
- [Ga E-rate Website](#)

