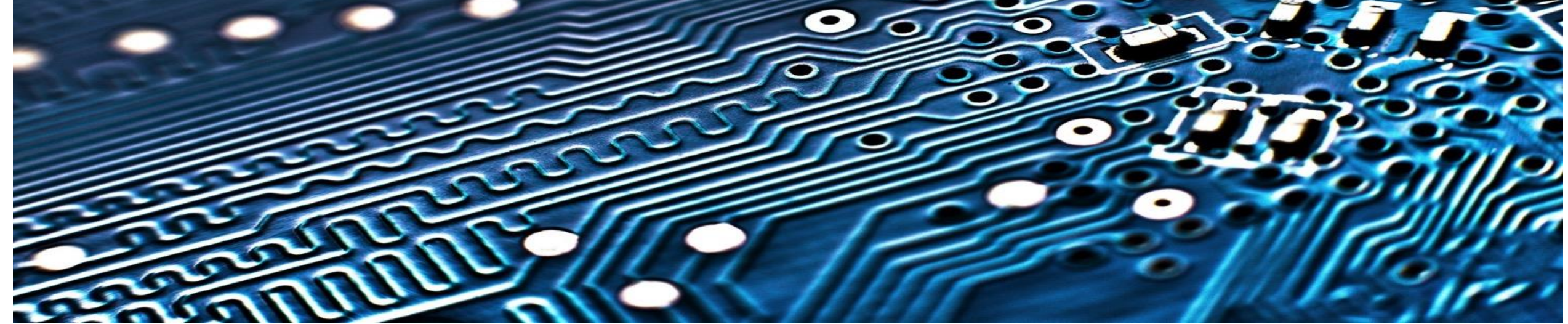


**UNIVERSITY SYSTEM OF GEORGIA**  
Information Technology Services

The top right section features a grey background with several white, stylized clouds. Below the clouds is the official logo of the University System of Georgia, which includes a building icon and the text "BOARD OF REGENTS OF THE UNIVERSITY SYSTEM OF GEORGIA". To the right of the logo, the text "UNIVERSITY SYSTEM OF GEORGIA" is written in a bold, white, sans-serif font, with "Information Technology Services" in a smaller font below it.

# E-rate Basics

## FY2017

The middle section has a dark, textured background. The title "E-rate Basics" is centered in a large, white, serif font, and "FY2017" is centered below it in a smaller, white, sans-serif font.

# 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  GO

## 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.

[Log In](#)

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>



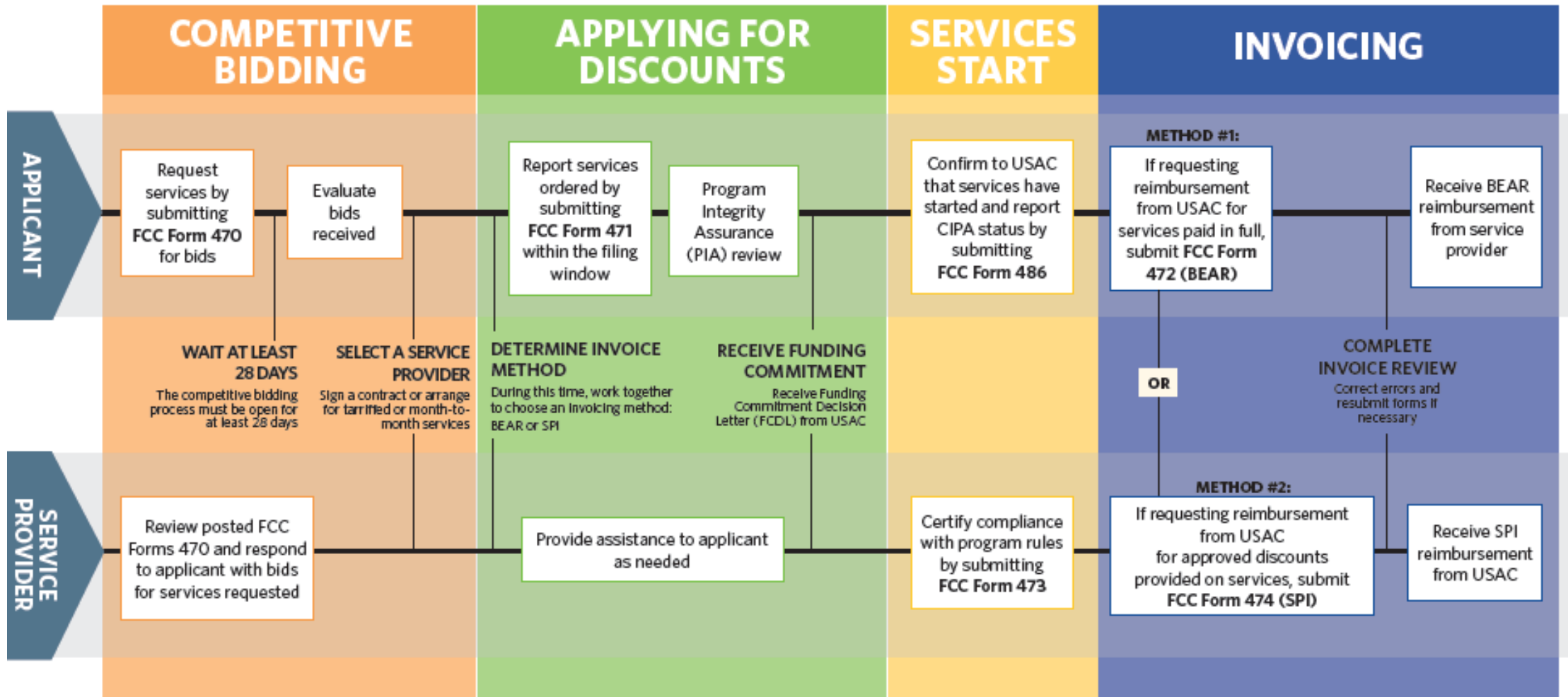
What's the process?



# 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 29<sup>th</sup> 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
<b>TOTAL</b>	<b>100</b>	<b>65</b>	<b>68</b>	<b>92</b>

\*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**

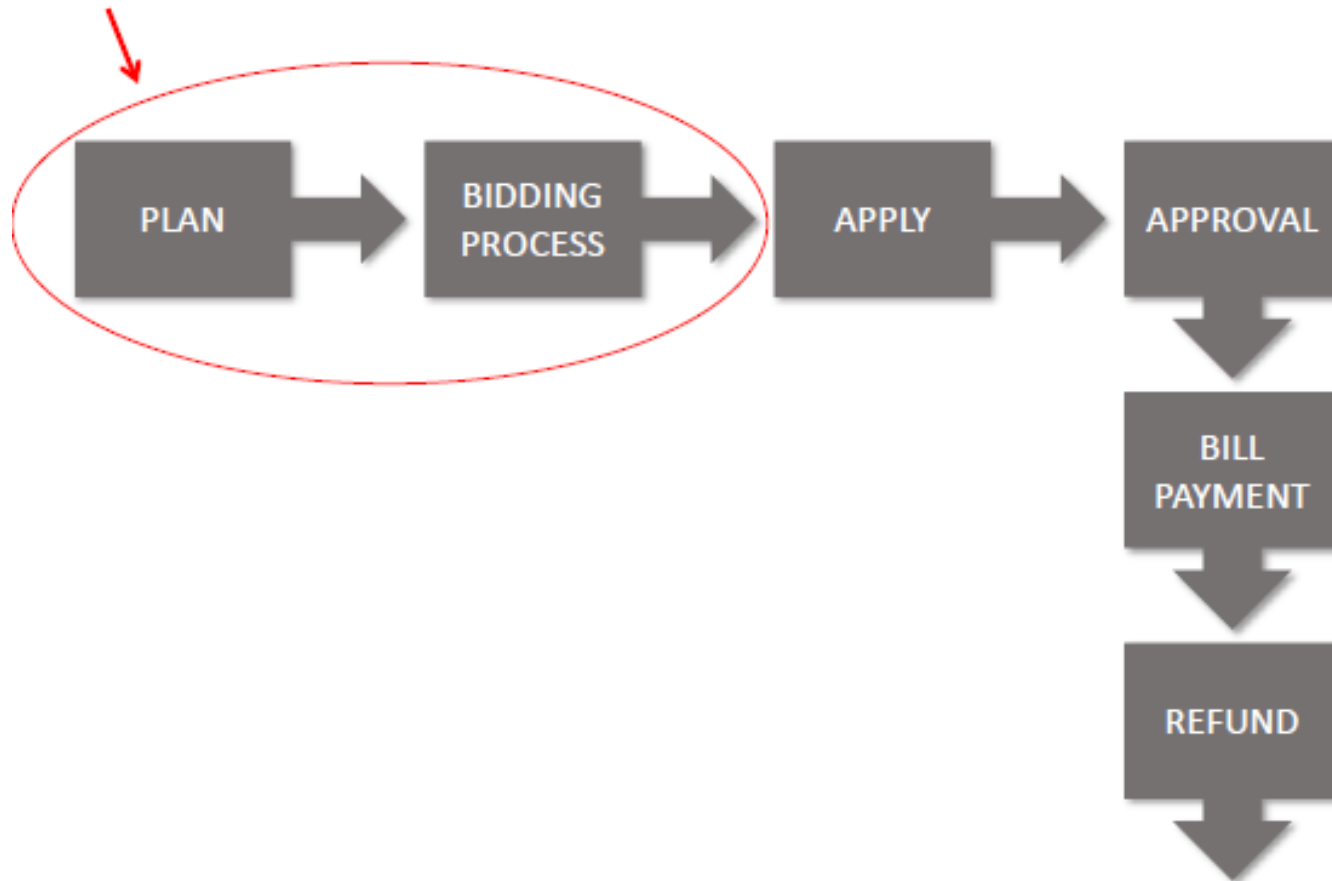
- Wave 13 for FY 2016
  1. Check EPC to see if you have been funded
  2. Don't forget to file a Form 486 in EPC

## **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](mailto:Gae-rate@usg.edu)
- [www.gae-rate.usg.edu](http://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](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](#)

