

FY2022 E-Rate Program Overview for Tribal Schools and Tribal Libraries

February 3, 2022



Universal Service
Administrative Co.

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- Audio is available through your computer's speakers
 - The audience will remain on mute
 - **Enter questions at any time using the “Questions” box**
 - If your audio or slides freeze, restart the webinar
 - **A copy of the slide deck is in the “Handouts” section of webinar panel**
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- **Please indicate if you are a Tribal leader as we will answer Tribal leader questions first.**

Meet Our Team



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Agenda

- USAC Overview
- Program Overview
- Eligibility Overview
- Important Terminology
- Application Process: Step-By-Step Overview
- Get Started: Requesting an Entity Profile for New E-Rate Applicants

Universal Service Administrative Company

Overview

Who We Are: The Universal Service Administrative Company

The Universal Service Administrative Company (USAC) is an independent, not-for-profit organization designated by the Federal Communications Commission (FCC) as the permanent administrator of the USF and its four programs.

- **The Universal Service Fund (USF):** Exists to ensure that all people in the United States have access to quality, affordable connectivity service.



Lifeline Program

Discounted phone and internet service to eligible low-income consumers.



E-Rate Program

Funding for broadband services to eligible schools and libraries.



Rural Health Care Program

Funding for telecom and broadband services for eligible rural health care providers.



High Cost Program

Reduced rates for telecom and broadband services in eligible high-cost areas.

Who We Are: The Universal Service Administrative Company

In response to the COVID-19 pandemic, Congress created multiple temporary programs to help people stay connected during this disruptive period. The FCC designated USAC to administer these programs.

- **COVID-19 Broadband Programs**



**Affordable
Connectivity
Program**



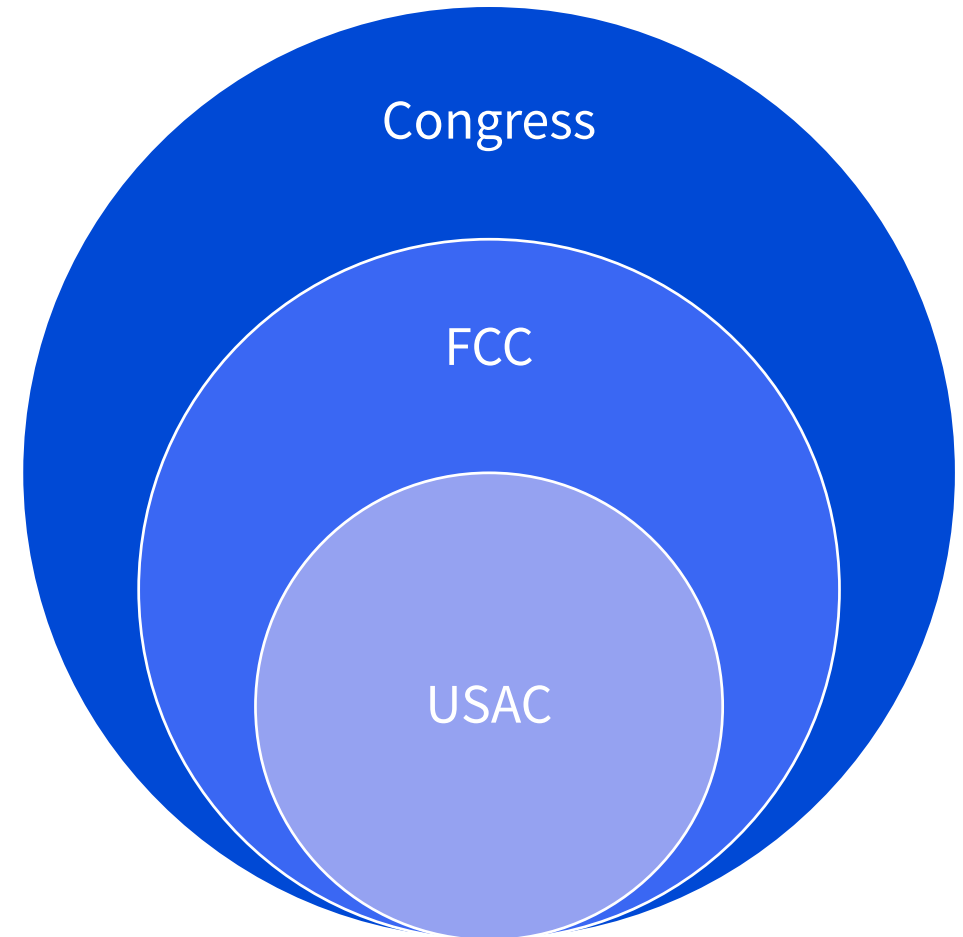
**Emergency
Connectivity Fund
Program**



**COVID-19 Telehealth
Program**

Who Makes The Rules?

- Congress enacted the Telecommunications Act of 1996, which directed the Federal Communications Commission (FCC) to establish the E-Rate program and the other USF programs.
- The FCC sets rules and policies for the program and gives direction to the Universal Service Administrative Company (USAC).
- USAC is responsible for the day-to-day administration of the E-Rate program.



Program Overview

Schools and Libraries (E-Rate) Program



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What is E-Rate?

- E-Rate helps schools and libraries across the U.S. ensure that they can obtain high-speed internet access and telecommunications at affordable rates.



How is This Accomplished Through E-Rate?

- The E-Rate Program provides discounts up to 90 percent to eligible public or private schools (K-12), libraries, and groups of schools and libraries (e.g., consortia, districts, systems) for E-Rate eligible internet access and data transmission services and internal connections (e.g., Wi-Fi equipment, cabling, and basic maintenance services) competitively bid and approved on the Application (FCC Form 471).
- These discounts result in a reduction of the costs for these service/equipment to the schools or libraries requesting funding from the E-Rate.
- For example: A library with a 90 percent discount purchasing \$1,000 in eligible broadband services would pay the non-discount share of \$100, while the E-Rate program would pay \$900 in discounts.

What Can Be Purchased?

- Eligible E-Rate services and equipment outlined in the Eligible Services List.
- Examples of frequent types of equipment/services purchased by libraries through E-Rate in Funding Year 2021:
 - Category 1 (C1) services are data transmission services and internet access services.
 - For example, Ethernet, Lit Fiber, Cable Modem, Microwave, DSL, Satellite Service,
 - Category 2 (C2) services are needed for broadband connectivity within schools and libraries.
 - For example, Access Points, Cabling, Switches, Routers and Antennas

Competitive Bidding – Exceptions

- All purchases must go through a competitive bidding process, with some exceptions.
- Exceptions:
 - Multi-year contracts that have already been competitively bid through the FCC Form 470 process.
 - C1 services for Commercially Available Business-Class Internet Access if all of the following are met:
 - It is **commercially available**. This means that it is publicly available to non-residential customers (such as enterprise, small business, or other government customers) in the same form and at the same rates that it is offered to schools or libraries. Therefore, it may not be purchased through a master contract signed for just certain customers, even if the contract includes schools and libraries.
 - It is **low cost**. This means that the total annual pre-discount cost for the service, including any one-time costs such as installation, **does not exceed \$3,600 per year per school or library**.
 - It is **high-speed**. This means that the service must provide **bandwidth speeds of at least 100 Mbps downstream and 10 Mbps upstream**.

Competitive Bidding – State/Tribal-Wide Contract Purchasing

- A state master contract is a contract that is competitively bid and put in place by a state government entity for use by an eligible entity. When competitively bidding the state master contract, a state/Tribal wide agency can submit a statewide FCC Form 470 that applicants can reference if they are purchasing from the state master contract.
- Alternately, if the state master contract was not competitively bid using an FCC Form 470, the applicant may file an FCC Form 470 and consider the state master contract as one of the bids received.

At a Glance: E-Rate Applicant Process Overview

- Pre-Plan [Before You Begin](#)
- Step 1 [Competitive Bidding](#)
- Step 2 [Selecting Service Providers](#)
- Step 3 [Applying for Discounts](#)
- Step 4 [Application Review](#)
- Step 5 [Starting Services](#)
- Step 6 [Invoicing](#)
- Review [Before You're Done](#)

Applicant Forms and Important FY2022 Dates

Step 1 Competitive Bidding

July 2021

to

February 22, 2022*

(*The last date that you can file and certify an FCC Form 470 and still have time to wait the required 28 days and submit your FCC Form 471 before the window closes on March 22 at 11:59 p.m. ET.)

470



Step 3 Apply for Discounts

January 12, 2022

to

March 22, 2022

at 11:59 p.m.

471



Step 5 Start Services

July 1, 2022

to

June 30, 2023

486



Step 6 Invoice USAC

Recurring Services
July 2022 – October 2023*

Non-recurring Services
July 2022 – January 2024*

472
(BEAR)

OR

474
(SPI)

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

E-Rate Eligibility Overview

Entities

Services



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Entity Eligibility

Schools Eligibility

- Must provide elementary and/or secondary education, as determined under state law.
- Cannot have an endowment exceeding \$50 million.
- Cannot operate as a for-profit business.
- Activities primarily for educational purposes that occur on school property.

Libraries Eligibility

- Budget must be separate from any school budget.
- Cannot operate as a for-profit business.
- Must be eligible for assistance from state library administrative agency under Library Services Technology Act (LSTA), as amended by the Museum and Library Services Act of 2018.
 - Tribal Library Eligibility Update: The FCC updated sections 54.500 and 54.501(b)(1) of the FCC's E-Rate program rules to amend the definition of library and to clarify that Tribal libraries are eligible for E-Rate support.

Spotlight: Tribal Library Eligibility

- A library may be designated as a Tribal library by a Tribal Council (e.g., pursuant to a Tribal Resolution).
 - Tribal libraries designated by a Tribal Council should have three characteristics commonly associated with Institute of Museum & Library Services (IMLS) grants to Native American libraries:
 - Regularly scheduled hours,
 - Staff, and
 - Materials available for library users.
-
- FAQ: Are Tribal College libraries eligible?
A. No. Libraries must be independent entities, whose budgets are completely separate from any schools (including, but not limited to elementary schools, colleges, and universities).

Non-Instructional Facility (NIF) Eligibility

- A Non-Instructional Facility (NIF) is a school building without classrooms or a library building without public areas. Non-instructional facilities on school and library property are eligible to receive discounts on data transmission services and internet access services (Category One services).
 - Examples of NIFs on school property include, but are not limited to:
 - Administrative buildings;
 - School bus barns and garages; and
 - Facilities associated with athletic activities.
 - Examples of NIFs on library property include, but are not limited to:
 - Bookmobile garages;
 - Interlibrary loan facilities; and
 - Library technology centers.
- More information is available on the [Non-Instructional Facility](#) page.

Educational Service Agency (ESA) Eligibility

- FCC rules do not specifically define or address Educational Service Agencies (ESAs).
- Federal law defines an ESA as a “regional public multiservice agency authorized by state statute to develop, manage, and provide services or programs to local educational agencies.”
- ESAs are known by a variety of names, including:
 - Educational Service Units (ESUs),
 - Local Educational Agencies (LEAs), and
 - Board of Cooperative Educational Services (BOCES).
- To determine whether an ESA is eligible to receive E-Rate program support as an applicant:
 - USAC must verify that the ESA provides elementary or secondary education as determined under state law:
 - Whether the entity provides elementary or secondary education to its student population, and
 - Whether the ESA facility is eligible for support because elementary or secondary education, as defined in state law, is provided at that facility.
- More information is available on the [Educational Service Agencies](#) page.

Consortium Eligibility

- A consortium (plural consortia or consortiums) is a group of E-Rate eligible entities that seeks competitive bids or E-Rate funding for eligible services on behalf of its members. Schools and/or libraries can form consortia for the purposes of the E-Rate program to aggregate demand in order to lower prices and promote more efficient use of shared facilities.
 - Consortia are not themselves eligible for discounted services, but they can run competitive bidding processes and/or apply for discounted services on behalf of their members.
 - Schools and libraries can join together to form consortia.
- There are two common reasons why applicants will choose to form a consortium:
 - One is to aggregate demand for lower prices; and
 - The other is to provide expertise to assist small entities with the application process. These small entities can join together and allow the consortium leader to run the processes on their behalf.

Consortium Eligibility – Tribal Government Information

SPOTLIGHT

A Tribal government can create a consortium for its Tribally controlled schools and libraries, and a Tribal government employee can act as the consortium leader.

- The [consortium leader](#) is responsible for ensuring that necessary certifications are made, responding to USAC inquiries on behalf of members, and maintaining records.
 - Consortium leaders must be authorized by each member to act on behalf of consortium members
- Review the [Registration Checklist for New Tribal Libraries](#) (PDF)

Services Eligibility

ELIGIBILITY – Equipment/Services

- Each year, the FCC issues a list of equipment and services that are eligible for the upcoming funding year.
 - Review the Funding Year 2022 [Eligible Services List](#).
 - Certain equipment may only be partially eligible for reimbursement through E-Rate. Contact the manufacturer or CSC if you are not sure.
- **Category One (C1)** services are not capped by a budget but must be cost-effective.
- **Category Two (C2)** services are limited by a pre-discount budget.
 - Budget period is five years.
 - Budget is calculated based on number of students (schools) or square footage (libraries).
 - **NOTE:** Libraries shall calculate the pre-discount amount based on the total area for all floors, in square feet, of each library outlet separately including all areas enclosed by the outer walls of the library outlet and occupied by the library and those areas off-limits to the public.
 - Beginning in FY2021, the budget is calculated at the school district or library system level, not at the individual site level.
 - Independent schools and libraries have their own independent budgets.

ELIGIBILITY – Equipment/Services

- **Category One (C1)** includes equipment and services from the service provider to the schools and/or libraries (demarcation point).
 - Data Transmission and/or Internet Access
 - Examples of Category One (C1) services:
 - Leased lit or dark fiber
 - Wireless services (e.g., microwave)
 - Satellite service
 - T-1, T-3, etc.
 - DSL

ELIGIBILITY – Equipment/Services

- **Category Two (C2)** includes equipment and services needed for broadband connectivity within schools and libraries.
 - **Three service types:**
 - Internal Connections (IC)
 - e.g., Routers, switches, Cabling, wireless access points)
 - Basic Maintenance of Internal Connections (BMIC)
 - e.g., Basic maintenance of eligible internal connections
 - Managed Internal Broadband Services (MIBS)
 - e.g., Managed internal broadband services (managed Wi-Fi)
- Specific equipment is either fully or partially eligible for E-Rate funding.
 - Eligibility for specific equipment can be determined by contacting the manufacturer or CSC.
 - Example of E-Rate Payments based on Equipment Eligibility:
 - 100% Eligible Equipment: Total cost of equipment approved * Discount Rate
 - 65% Eligible Equipment: Total cost of equipment approved * 65% * Discount Rate

ELIGIBILITY – Calculating Budget for C2 Services

- **Category Two (C2)** multipliers and funding floor are set by the FCC.
 - For the FY2021–FY2025 cycle:
 - The school multiplier is \$167.00 per student.
 - The library multiplier is \$4.50 per square foot for all libraries.
 - The funding floor is \$25,000.00.
 - Applicants are eligible for the \$25,000 funding floor when the C2 budget calculation for an entity results in a figure below the \$25,000.
 - If the total student count or square footage changes during the five-year funding cycle, applicants may request a C2 budget recalculation, but they are not required to do so.
- **Reminder:** Libraries shall calculate the pre-discount amount based on the total area for all floors, in square feet, of each library outlet separately including all areas enclosed by the outer walls of the library outlet and occupied by the library and those areas off-limits to the public.

Eligible Fiber Services: Special Construction

- Special construction charges are the upfront, non-recurring costs of deploying new or upgraded network facilities to eligible entities.
- Special construction charges eligible for Category One (C1) support consist of three components:
 - Construction of network facilities;
 - Design and engineering; and
 - Project management.
- Applicants may seek funding for special construction charges in connection with leased lit fiber, leased dark fiber, and self-provisioned networks.

Eligible Fiber Services: State/Tribal Match Funding

- If a state provides eligible schools and libraries with funding for special construction charges for high-speed broadband that meets the FCC's long-term connectivity targets, the E-Rate program will increase an applicant's discount rate for these charges up to an additional ten percent to match the state funding on a one-to-one dollar basis.
- State funding can be funds authorized directly by a state legislature or provided by one or more state agencies.

SPOTLIGHT

For Tribal schools and libraries, the E-Rate program will also match special construction funding provided by states, Tribal governments, or other federal agencies on a one-to-one basis, up to an additional ten percent for the applicant's discount rate. Total E-Rate support with matching funds may not exceed 100 percent.

- More information is available on the [Additional Discount to Match State/Tribal Funding for Special Construction](#) page.

Eligible Fiber Services: State/Tribal Match Funding

- [State or Tribal Match](#) Eligibility Requirements:
 - The broadband service must meet the FCC's long-term connectivity targets.
 - The funding must be from an eligible source.
 - The terms and conditions associated with the state funding must not conflict with E-Rate program rules.
 - The total amount of support, including matching funds, may not exceed 100 percent of the cost of the project.
 - State (or Tribal) match funds are available for special construction only—applicants should create separate funding requests on their FCC Forms 471 for special construction.
- Applicants seeking additional E-Rate discounts to match state funding for special construction must submit information with their FCC Form 471 filing that USAC will use to determine:
 - Whether the state funding is from an eligible source;
 - That any terms and conditions associated with the state funding are not in conflict with E-Rate rules;
 - The appropriate calculation of the additional E-Rate discount, if any; and
 - Whether the project meets the FCC's connectivity targets.

Important E-Rate Terminology

E-Rate Productivity Center (EPC)

Funding Year

Filing Window

Identifying Numbers (BEN, SPIN, CRN)

Funding Request Number (FRN)

Service Start Date

Children's Internet Protection Act (CIPA)



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E-Rate Productivity Center (EPC)

- **E-Rate Productivity Center (EPC)** is the account and application management portal for the E-Rate program.
- Applicants use this tool to:
 - Manage and complete E-Rate program processes,
 - Receive notifications,
 - Open customer service cases, and
 - Contact customer service.
- Instructional Step-by-Step Videos are available on the [Videos](#) page.
- **Note:** Setting up new user and entity profiles in the EPC can take several days to complete depending on a number of factors, including the number of entities joining a consortium and the availability of designated users to activate their accounts. See the [Before You Begin](#) page or the [Registration Checklist for New Tribal Libraries](#) (PDF).

Funding Year

- A Funding Year (FY) starts on July 1 and ends the following June 30.
 - **FY2022 starts 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).

Filing Window

- All FCC Forms 471 are filed during the FCC Form 471 application filing window.
 - The filing window generally opens in mid-January and closes in mid-March in advance of the start of the funding year (the FY 2022 filing window is open from January 12, 2022 through March 22, 2022).
- Applications (FCC Forms 471) filed outside of the filing window are not considered for funding and will need a waiver from the FCC.
- **FCC Window Waiver**
 - USAC cannot approve appeals or waiver requests that ask for a waiver of the E-Rate program rules—you must file a request for waiver with the FCC.
 - Basic instructions for filing the FCC Window Waiver Requests is on the [FCC Form 471 Filing](#) page.

**Apply for
Discounts**

471

Identifying Numbers

- **Billed Entity Number (BEN)** - Assigned to each **applicant entity** in the system.
 - Each entity that receives and pays bills is assigned a **Billed Entity Number (BEN)**.
 - For example: independent schools, school districts, independent libraries, library systems, consortia, educational service agencies.
 - Schools in a school district, libraries in a library system, and NIFs also have entity numbers.
- **Service Provider Identification Number (SPIN)** - Assigned to participating providers.
 - Service providers may have more than one SPIN due to:
 - Different business units or service areas.
 - Mergers and acquisitions.
- **Consultant Registration Number (CRN)** - Assigned to each consultant in the system.
 - A consultant may be a single individual or a consulting firm with multiple employees.

Funding Request Number (FRN)

- Applying for discounts
 - You list the equipment and/or services and identify the costs for those equipment and/or services on the FCC Form 471.
 - Each of these funding requests is assigned a number – a Funding Request Number (FRN).
 - You can have one or multiple FRNs on your FCC Form 471.
- FRNs are specific to:
 - Recipient(s) of Service (ROS)
 - Category of service
 - Service type (Data Transmission and/or Internet Access, Internal Connections, BMIC, Managed Internal Broadband Services)
 - FCC Form 470
 - Service provider (SPIN)
 - Contract, if you have one
- An FRN can have one or many types of equipment and/or services, as long as the equipment and/or services have all the above in common.

Service Start Date

- What is my Service Start Date (SSD)?
 - If the SSD occurs:
 - Before the start of the funding year, the start date is the first day of the funding year: July 1, 2022.
 - i.e., For installations that started on May 25, 2022 before the funding year, the SSD is July 1, 2022 of the funding year.
 - Starts on any day during the funding year (between July 1, 2022 and June 20, 2023), then the first day is the actual start date.
 - i.e., For services starting August 7, 2022 of the funding year, the SSD is August 7, 2022 of the funding year.

Start Services

486

Funding Year 2022

July 1, 2022

to

June 30, 2023

Children's Internet Protection Act (CIPA)

- Applicants must certify compliance with the Children's Internet Protection Act (CIPA) to be eligible for E-Rate program discounts on Category One internet access and all Category Two services – internal connections, managed internal broadband services, and basic maintenance of internal connections.
- **CIPA requirements** include the following three items:
 1. Internet Safety Policy;
 2. Technology Protection Measure; and
 3. Public Notice and Hearing or Meeting.
- In general, **school and library authorities must certify that:**
 1. They have complied with the requirements of CIPA;
 2. They are undertaking actions, including any necessary procurement procedures, to comply with the requirements of CIPA; or
 3. CIPA does not apply because they are receiving discounts for telecommunications services only.
- Learn more on the [CIPA](#) page.

Questions?

Application Process

Step-by-Step Overview



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What is the Application Process?

Pre-Plan	<u>Before You Begin</u>
Step 1	<u>Competitive Bidding</u>
Step 2	<u>Selecting Service Providers</u>
Step 3	<u>Applying for Discounts</u>
Step 4	<u>Application Review</u>
Step 5	<u>Starting Services</u>
Step 6	<u>Invoicing</u>
Review	<u>Before You're Done</u>

Applicant Forms and Important Dates

Step 1 Competitive Bidding

July 2021

to

February 22, 2022

(The last date that you can certify an FCC Form 470 and still have time to wait the required 28 days and certify your FCC Form 471 before the window closes on March 22 at 11:59 p.m. ET.)

470

Step 3 Apply for Discounts

January 12, 2022

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Step 5 Start Services

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Step 6 Invoice USAC

Recurring Services
July 2022 – October 2023*

Non-recurring Services
July 2022 – January 2024*

472
(BEAR)

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

Avoid Conflict of Interest

- Applicants must ensure an open and fair competitive bidding process, FCC Form 470.
- Applicants may not delegate the evaluation role to anyone associated with a service provider.
- When reviewing bids, the applicant must conduct a fair and open competitive procurement.
 - **“Open”** means there are no secrets in the process – such as information shared with one bidder but not with others – and that all bidders know what is required of them.
 - **“Fair”** means that all bidders are treated the same and that no bidder has advance knowledge of the project information.
- E-Rate program rules impose significant restrictions on applicants and consultants regarding the direct or indirect solicitation or acceptance of gifts from service providers or prospective service providers.
- **Applicants must avoid conflicts of interest in the bidding process.**
 - For example, a conflict of interest exists when the applicant’s consultant is associated with a service provider that is selected and is involved in determining the services sought by the applicant and the selection of the applicant’s service provider(s).
- Learn more on the [Open & Fair Process](#) page and the [Gift Rules](#) page.

Document Retention

- You must keep all [documentation](#) for at least 10 years from the last date to receive service.
 - Here are some examples of documentation that would be needed for pre-planning and step one:
 - Evidence of eligibility for E-Rate participation
 - Proof of square footage
 - Competitive Bidding/Evaluation Matrix
 - For multi-year contracts, this means 10 years from the contract expiration date.
- Retain receipt and delivery records relating to pre-bidding, bidding, contracts, application process, invoices, provision of services, and other matters relating to your applications.
 - i.e., For recurring internet access service for FY2022, both the applicant and the service provider **must retain all records** until at least June 30, 2033.

Step 1: Competitive Bidding

FCC Form 470

FCC Form 470: Description of Services Requested and Certification Form

FCC Form 470 Overview

- **Step 1:** Use FCC Form 470 to start your competitive bidding process.
 - Prepare to evaluate bids.
 - Create an evaluation matrix using the price of the eligible services or equipment as the primary factor.
 - You may use other bid evaluation factors, but price of the eligible services and equipment must be the most heavily weighed factor.
 - Wait at least 28 days before moving to Step 2: Select a Service Provider.

**Competitive
Bidding**

470

FY2022 Dates

July 2021
to
February 22, 2022

Requesting Services

- The FCC Form 470 opens the competitive bidding process.
- It notifies potential bidders of the types and quantities of equipment and/or services requested.
- Only the applicant or its authorized representative can prepare, sign, or submit the FCC Form 470.

**Competitive
Bidding
470**

Competitive Bidding Requirements

- The competitive bidding process must be open and fair.
 - **Open** = information shared with one bidder must be shared with all.
 - **Fair** = bidders must be evaluated fairly and equally.
- **28-Day Waiting Period**
 - FCC Form 470 must be posted on the USAC website for a minimum of 28 days before you select a vendor and file an FCC Form 471.
- You must comply with all E-Rate, state, Tribal, and/or local procurement requirements.

**Competitive
Bidding
470**

Requesting Services: Requests for Proposal

- **Requests for Proposals (RFPs)** may be created to describe specific needs and circumstances in more detail.
- RFP documents are any documents that provide additional information to potential bidders on the scope or details of your project.
 - For most types of service requests, RFPs are not required. However, you must issue an RFP for some requests or if you are required to do so by state, Tribal, or local rules.
 - Services on your FCC Form 470 and RFP must match.
 - All RFPs and RFP documents must be attached to your FCC Form 470 in EPC.

**Competitive
Bidding**

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”
- 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.”
- Bidder disqualification criteria must be included in FCC Form 470 and/or RFP and be available to all potential bidders.
- **Related Resources**
 - Relevant Training: **Competitive Bidding (FCC Form 470) and Guiding Statements Overview and Office Hour**
 - [Watch the Recording](#)
 - [Slide Deck](#)
 - [FCC Form 470 Services Guiding Statements Reference Table \(FY2022\)](#) (PDF)

**Competitive
Bidding
470**

Competitive Bidding Requirements: Lowest Corresponding Price

- **Service providers are required** to offer applicants their services at the lowest corresponding prices charged to other similarly situated customers throughout their geographic service area.
- This rule ensures that you are not charged more than similarly situated non-residential customers for the same services because of E-Rate program participation.
- Exceptions can be made if the provider can show that they face significantly higher costs to serve this customer due to volume, mileage from facility, and/or length of contract.
- Applies to all service providers and for all service arrangements (tariff, month-to-month and contracted services).

**Competitive
Bidding**

470

Requesting Services: FCC Form 470 Receipt Notification Letter

- After posting FCC Form 470, USAC issues a **Receipt Notification Letter (RNL)** in your EPC News feed.
- Review your submitted FCC Form 470 carefully.
- If you need to make corrections:
 - For non-substantive changes, locate the form in EPC and choose “Related Actions” to submit allowable corrections.
 - For a material change to your requests, you must file a new FCC Form 470.

**Competitive
Bidding**

470

Pro-Tip: Review Resource for Competitive Bidding

- Review the Related User Guides:
 - [FCC Form 470 Filing EPC System Guide FY2022](#) (PDF)
 - [FCC Form 470 Services Guiding Statements Reference Table \(FY2022\)](#) (PDF)
- Instructional videos on FCC Form 470 are available online:
 - [How to File an FCC Form 470](#) (26:04 mins)
 - [How to Search for FCC Form 470](#) (12:25 mins)
 - [E-Rate Competitive Bidding Process](#) (5:00 mins)
- Keep information about Eligible Services on hand:
 - [FY2022 Eligible Services List](#) (PDF)
 - Eligible Services 101 Webinar [Slide Deck](#) (PDF)

Pro-Tip: Review Resource for Competitive Bidding

- Training
 - Recorded Training:
 - Competitive Bidding (FCC Form 470) and Guiding Statements Overview and Office Hour
 - [Watch the Recording](#)
 - [Slide Deck](#)
 - **Upcoming Training**
 - **Session 2: FCC Form 470 Walkthrough for Tribal Applicants (The First Form) - [Register](#)**
February 8, 2022 at 4 p.m. ET
 - **Session 3: Office Hours for Tribal Applicants - [Register](#)**
February 15, 2022 at 4 p.m. ET

Step 2: Selecting Service Providers

Evaluating Bids

Evaluating Bids

- To evaluate incoming bids, create a bid evaluation matrix or similar document.
- Develop evaluation criteria or factors to assess the bids.
 - You can have one or multiple factors.
- Assign each evaluation factor a point value or percentage.
 - **The price of the eligible products and services must be the most heavily weighted factor.**
 - Other factors, including other non-price factors, can be considered as well; but they cannot be weighted equally or higher than price of the eligible goods and services.
- The vendor with the most overall points is the winner.
- **Resources**
 - Review the [How to Construct an Evaluation Matrix](#) webpage
 - Download a [Sample Bid Evaluation Matrix](#) (PDF)

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 products 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.

Evaluating Bids: Zero or One Bid Received

- If you receive only one bid, and it is cost-effective, you may accept it.
 - Document your decision with a memo or email to your file.
- If you did not receive any bids, you can solicit bids after the 28-day waiting period.
 - Reach out to vendors in the area.
 - Ask your current service provider to submit a bid or confirm they are willing to continue your current services at the same cost.

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.
- Backup or redundant services – services sought to reduce reliance on any single service provider's network during an outage – 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.
- USAC cannot fund duplicative services.

Fair and Open Competition: Gift Rules

- Receipt or solicitation of gifts by applicants from service providers (and vice versa) and potential service providers is a competitive bidding violation.
- Service providers may not offer or provide any gifts or thing of value to applicant personnel involved in the E-Rate program.
- Gift prohibitions are always applicable, not just during the competitive bidding process.
- Exceptions for gifts must be limited to items worth \$20 or less, including meals or prizes, and cannot to exceed \$50 from one service provider to each individual per funding year.
- Watch our [Gift Rules video](#) for more details on the gift rules.
- **FCC E-Rate Gift Rule Waiver Extended through the end of FY2021**
In light of the ongoing COVID-19 pandemic, the FCC found good cause to extend its waiver of the E-Rate program gift rule through June 30, 2022, the end of FY 2021. (See [DA 21-1257](#)).

Contracts

- Applicants must have a signed contract or other legally binding agreement in place and loaded in EPC prior to submitting their FCC Forms 471 to USAC.
- Applicant must not sign a contract before the Allowable Contract Date (ACD), which is 28 days after the FCC Form 470 is filed.
- Signed contracts constitute the best evidence that a legally binding agreement exists.
- A verbal offer and/or acceptance will not be considered evidence of the existence of a legally binding agreement.
- Learn more on the [State Master Contracts](#) webpage.
- **Resource**
 - **Instructional Video:** [How to Create a Contract Record](#) (5:58 mins)

Pro-Tip: Review Resource for Selecting Service Providers

- [Selecting Service Providers](#) webpage
- Review the [How to Construct an Evaluation Matrix](#) webpage
- **Reminder**
 - Your [FCC Form 470](#) and your request for proposal (RFP), if you issued one, must both have been publicly available for the same [28-day period](#) before you can close your competitive bidding process.
 - Once you have chosen your service provider(s) and signed a contract (if applicable), you can file an FCC Form 471 to apply for discounts as soon as the [FCC Form 471](#) application filing window opens.
 - Document Retention
 - You must keep all [documentation](#) for at least 10 years from the last date to receive service.
 - For multi-year contracts this means 10 years from the contract expiration date.

Step 3: Calculating Discounts

Discounts are calculated and reported to USAC on
FCC Form 471

FCC Form 471: Description of Services Ordered and Certification Form

- **Step 3:** Apply for Discounts using FCC Form 471
- Provide information about your requests
 - Discount level
 - Costs of services
 - Service providers

**Apply for
Discounts**

471

FY2022 Dates

January 12, 2022
to
March 22, 2022
at 11:59 p.m.

Discounts – Overview

- Discounts depend on two factors:
 - The percentage of students eligible for the National School Lunch Program (NSLP) school district.
 - The urban or rural status of the school district or library system.

**Apply for
Discounts**

471

FY2022 E-RATE COVID-19 RESPONSE UPDATE

- Due to the ongoing impact of the COVID-19 pandemic, the FCC acknowledges that it may be challenging to provide student enrollment and NSLP numbers as of October 1, 2021.
 - In preparation for the FY2022 application filing window, applicants will be permitted to provide full-time student enrollment numbers from their most recently approved FCC Form 471/NSLP profile information (including FY2020 or FY2021).
 - Applicants can use their more recently approved FCC Form 471 student enrollment/NSLP information available.
 - This includes providing full-time student enrollment numbers from the most recently approved FCC Form 471 and the most recent and available NSLP information, even if this information is across different school/funding years.

Discounts – NSLP Calculations

- **School District NSLP Calculations**

- Determine the total number of students eligible for NSLP in the school district.
- Determine the total number of students in the school district.
- Divide the first number by the second number.

- **Library NSLP Calculation**

- Determine the main branch of the library.
- Determine the school district in which the main branch of the library is located.
- Use the NSLP percentage calculation for that school district.

**Apply for
Discounts**

471

Discounts – Consortium Discount

- The discount calculation for a consortium is the simple average of the discounts of its members.
- However, the discount for a consortium on a particular application (FCC Form 471) is calculated based on the members of the consortium that are featured on that application.

Discount Matrix

Income Measured by percentage of students eligible for NSLP	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	90% for C1, 85% for C2

- National School Lunch Program (NSLP)
- Category One (C1) Services
- Category Two (C2) Services

Pro-Tip: Review Resource for Calculating Discounts

- Review the [Before You Begin](#) webpage
- Discounts range from 20 to 90 percent of the cost of eligible services. You can:
 - Refer to the program's [discount matrix](#) for basic information on discount percentages, and
 - Review information on [calculating your discount](#) to find out what your discount would be.
- **Reminders**
 - Applicants seeking additional E-Rate discounts to [match state funding for special construction](#) must submit information with their FCC Form 471 filing that USAC will use to determine eligibility.
 - Schools and libraries can apply on their own or they can form [consortia](#) to aggregate demand and thereby negotiate lower prices. The entity leading the consortium may or may not be eligible for discounts.

Pro-Tip: Review Resource for Calculating Discounts

- **Instructional Videos on FCC Form 471**
 - Category One (C1)
 - [Category One: Starting Your FCC Form 471](#) (3:38 mins)
 - [Category One: Creating Funding Requests](#) (9:25 mins)
 - [Category One: Certification](#) (4:30 mins)
 - Category Two (C2)
 - [Category Two: Starting Your FCC Form 471](#) (4:32 mins)
 - [Category Two: Creating Funding Requests](#) (13:03 mins)
 - [Category Two: Certification](#) (4:31 mins)
- Upcoming Training
 - **Session 4: FCC Form 471 Walkthrough for Tribal Applicants (The Second Form) - [Register](#)**
March 8, 2022 at 4 p.m. ET
 - **Session 5: Office Hours for Tribal Applicants - [Register](#)**
March 15, 2022 at 4 p.m. ET

Step 4: Application Review

Program Integrity Assurance (PIA)

Application Review (Program Integrity Assurance (PIA))

- General Time Frame: From Application Submission Date to September.
- All applications go through an initial review and a final review.
- This may involve questions from Program Integrity Assurance (PIA) on one or more of the following:
 - Eligibility of the entities receiving service
 - Eligibility of the services requested
 - Discount calculations
 - Contracts
 - The competitive bidding process
- You have [15 days to respond](#) to PIA questions.
- You can ask for more time if you need it, but keep in mind that this will add more time to the review process.
- Your [service provider\(s\) can assist](#) you with preparing responses to USAC's questions except for questions about your service provider selection process.

Pro-Tip: Review Resource for Application Review

- Read more info on the [Application Review](#) webpage
- Relevant Training
 - Program Integrity Assurance (PIA) Review and Selective Review
 - [Webinar slides](#) (May 26, 2021) for information about:
 - Application Review Process
 - Preparing for PIA Review
 - PIA Inquiries
 - Selective Review
 - Funding Decisions
 - Updating Your Contract Information

Step 5: Starting Services

Service Start Dates

FCC Form 486: Receipt of Service Confirmation and Children's Internet Protection Act Certification Form

- **Step 5:** Submit FCC Form 486 to tell USAC when your services have started.
- Services should start before the deadline noted in your Funding Commitment Decision Letter (FCDL).
- The FCC Form 486 **MUST be certified** no later than (whichever is later):
 - 120 days after the Service Start Date (SSD) reported on the FCC Form 486, or
 - 120 days after the date of the Funding Commitment Decision Letter (FCDL).
- Late submission of the FCC Form 486 can impact your commitment.
- Verify **your Children's Internet Protection Act (CIPA) compliance**.
- Answer USAC review questions.

Start Services

486

FY2022 Dates

July 1, 2022
to
June 30, 2023

Review: Children's Internet Protection Act (CIPA)

- Applicants must certify compliance with the Children's Internet Protection Act (CIPA) to be eligible for E-Rate program discounts on Category One internet access and all Category Two services – internal connections, managed internal broadband services, and basic maintenance of internal connections.
- **CIPA requirements** include the following three items:
 1. Internet Safety Policy;
 2. Technology Protection Measure; and
 3. Public Notice and Hearing or Meeting.
- In general, **school and library authorities must certify that:**
 1. They have complied with the requirements of CIPA;
 2. They are undertaking actions, including any necessary procurement procedures, to comply with the requirements of CIPA; or
 3. CIPA does not apply because they are receiving discounts for telecommunications services only.
- Learn more on the [CIPA](#) page

Reminder: Service Start Date

- **Review: What is my Service Start Date (SSD)?**
 - The first day of the funding year, when services start on or before July 1.
 - e.g., Equipment installations that started on May 25 before the funding year, the SSD is July 1 of the funding year.
 - Any day after July 1, but before June 30 of the funding year, on which services were actually started.
 - e.g., For services starting on August 7 of the funding year, the SSD is August 7 of the funding year.

Start Services

486

When Do I File the FCC Form 486?

- The FCC Form 486 **MUST** be certified no later than:
 - 120 days after the Service Start Date (SSD) reported on the FCC Form 486, or
 - 120 days after the date of the Funding Commitment Decision Letter (FCDL), whichever is later.

Start Services
486

Review: Important Dates

Service Delivery Date

Equipment Service Delivery Date (SDD)

- To be eligible for program support, eligible services must be received during a specific period of time related to the particular funding year for which discounts are requested.
- In general, non-recurring services must be delivered and installed between July 1 of the relevant funding year and September 30 following the June 30 close of that funding year.
- For Funding Year 2022, the program year begins on July 1, 2022, ends on June 30, 2023, and all equipment is required to be installed by September 30, 2023, unless an extension is granted.

Start Services
486

July 2020						
Su	Mo	Tu	We	Th	Fr	Sa
			✗	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

15 months

September 2021						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	✗		

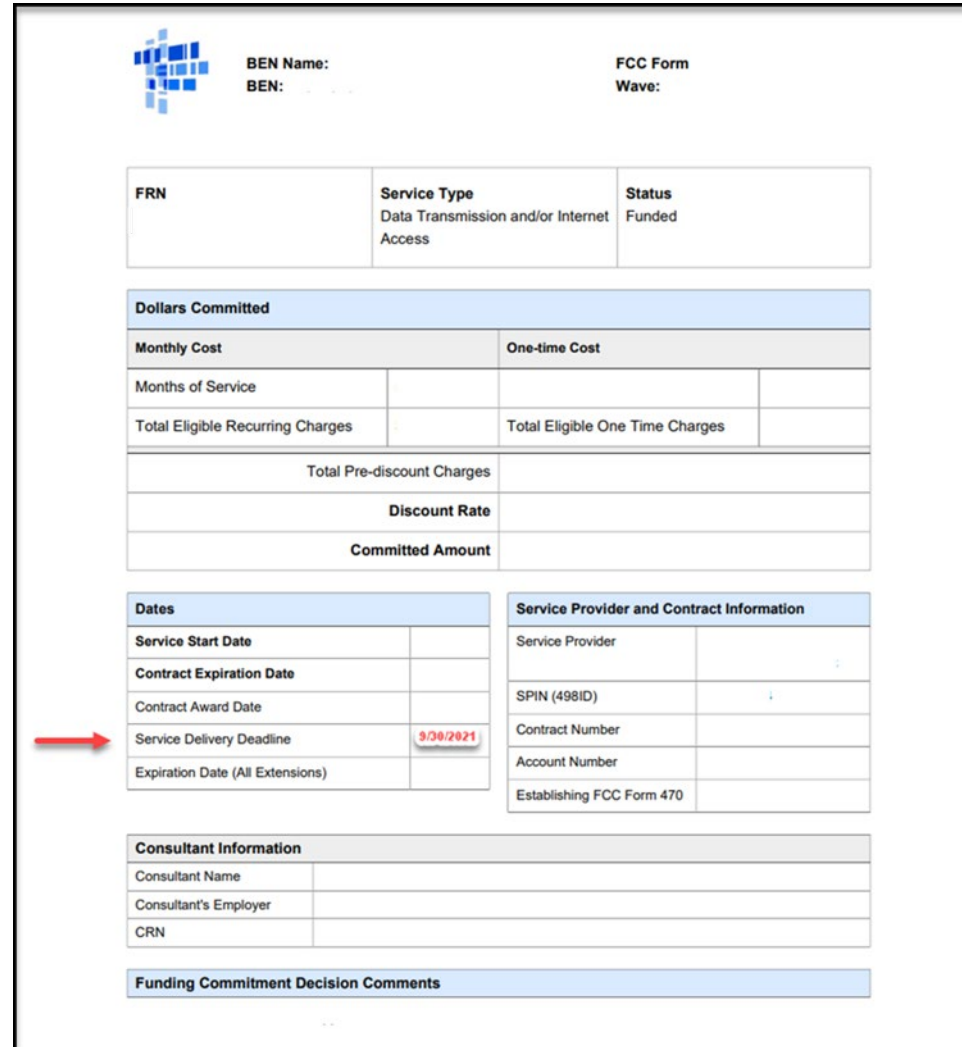
Service Delivery Deadlines

- The Service Delivery Date (SDD) for each Funding Request Number (FRN) is provided in a table.
- The table is located on the Funding Commitment Decision Letter (FCDL) and/or the Revised Funding Commitment Decision Letter (RFCDL) on the last page under “Dates.”
- Service Delivery Deadlines are subject to change based on FCDL/RFCDL.
 - Use [Open Data](#) to confirm your Service Delivery Deadlines.
 - This data can be located in the [FRN Status dataset](#).
 - Step-by-step instructions can be found in the E-Rate News Brief: [October 22, 2021](#).

Start Services

486

Location of Service Delivery Deadline on FCDL/RFCDL



The screenshot displays the FCC Form 470 interface. A red arrow points to the 'Service Delivery Deadline' field in the 'Dates' section, which is highlighted with a red border and contains the date '9/30/2021'.

BEN Name:
 BEN:
 FCC Form Wave:

FRN	Service Type Data Transmission and/or Internet Access	Status Funded
------------	---	-------------------------

Dollars Committed			
Monthly Cost		One-time Cost	
Months of Service			
Total Eligible Recurring Charges		Total Eligible One Time Charges	
Total Pre-discount Charges			
Discount Rate			
Committed Amount			

Dates		Service Provider and Contract Information	
Service Start Date		Service Provider	
Contract Expiration Date		SPIN (498ID)	
Contract Award Date		Contract Number	
Service Delivery Deadline	9/30/2021	Account Number	
Expiration Date (All Extensions)		Establishing FCC Form 470	

Consultant Information	
Consultant Name	
Consultant's Employer	
CRN	

Funding Commitment Decision Comments

Pro-Tip: Review Resources for Starting Services

- [Starting Services](#) webpage
- Instructional Videos
 - [How to File the FCC Form 486](#) (5:46 mins)
 - [Children's Internet Protection Act \(CIPA\)](#) (7:00 mins)

Step 6: Invoicing

Invoice Delivery Deadlines

Invoicing Methods

- The invoicing method is chosen by the applicant.
 - Must be decided before certification of FCC Form 471 (Description of Services Ordered and Certification Form)
 - Method is Funding Request Number (FRN) specific
 - Non-reversible once the method is chosen
- Two Options (more info on next slides):
 - FCC Form 472 (Billed Entity Applicant Reimbursement (BEAR) Form)
 - FCC Form 474 (Service Provider Invoice(SPI) Form)
- NOTE: Once USAC processes an invoice for a Funding Request Number (FRN), the method of invoicing is set for that FRN and cannot be changed.

BEAR Form

472

SPI Form

474

FCC Form 472: Invoice USAC (BEAR Form)

- Billed Entity Applicant Reimbursement (BEAR) Form
 - Submit and certify an FCC Form 498 to provide your banking information and backup documents to USAC for review.
 - Pay your customer bill (issued by your service provider) in full and maintain documentation associated with your FCC Form 472 (BEAR Form).
 - Bill for approved services delivered to the approved Recipient(s) of Service (ROS) at quantities and rates not to exceed what was listed on the FCC Form 471.
 - The E-Rate program record retention period is at least 10 years.
 - Answer any USAC review questions.

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

Invoice USAC 472

FY2022 Dates

Recurring Services Invoicing Dates

July 2022 – October 2023*

Non-recurring Services Invoicing Dates

July 2022 – January 2024*

FCC Form 474: Service Provider Invoice USAC (SPI Form)

- Service Provider Invoice (SPI) Form
- Your service provider will invoice USAC for the discount amount using the FCC Form 474 (SPI Form).
 - You must pay the non-discounted customer share of costs on the customer bill (issued by your service provider) to your service provider.
- Your service provider will only bill for approved services delivered to the approved Recipient(s) of Service (ROS) at quantities and rates not to exceed what was listed on the FCC Form 471.
- Answer any USAC review questions.

Invoice USAC
474

FY2022 Dates

**Recurring Services
Invoicing Dates**

July 2022 – October 2023*

**Non-recurring Services
Invoicing Dates**

July 2022 – January 2024*

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

When to File an Invoice

- File after equipment and/or services are delivered and paid.
- Reminder, indicated your method on FCC Form 471:
 - For the BEAR Method, applicants pay service provider in full.
 - For the SPI Method, service providers bill applicant for their non-discount share first.
- You can choose the frequency.
- **Important! File invoices on or before the invoice filing deadline:**
 - Generally, October 28 for recurring services.
 - Generally, January 28 for non-recurring services.
 - If the deadline falls on a weekend or federal holiday, the deadline is extended to 11:59 p.m. ET on the following business day.

BEAR Form

472

SPI Form

474

Service Delivery Deadline (SDD)

- **Non-recurring services** must be **delivered and installed** within 15 months after the beginning of the funding year.
 - FY2022: Between July 1, 2022 and September 30, 2023*
NOTE: This timeframe does not represent the invoice deadline.
 - Certain recipients may receive extensions of the deadline for delivery and installation of these non-recurring services, which can occur for various reasons, including but not limited to:
 - A Funding Commitment Decision Letter (FCDL) is issued by USAC on or after March 1 of the funding year.
 - The applicant requested an extension because the service provider was unable to complete delivery and installation for reasons beyond the service provider's control.

BEAR Form

472

SPI Form

474

* Date ranges reflect a typical timeline, but are subject to change on FCDL/RFCDL Dates.

Invoice Deadline Date (IDD)

- The invoice filing deadline is:
 - 120 days after the last date to receive service;
 - 120 days after the date of the FCC Form 486 Notification Letter; or
 - 120 days after a Revised Funding Commitment Decision Letter (RFCDL) approving a post-commitment change or a successful appeal of a previously denied or reduced funding request, whichever is later.
 - i.e., the invoice deadline for FY 2022 recurring services will occur in October 2023.*
 - If the deadline falls on a weekend or federal holiday, the deadline is extended to 11:59 p.m. ET on the following **business day**.

BEAR Form

472

SPI Form

474

* Date ranges reflect a typical timeline, but are subject to change on FCDL/RFCDL Dates.

Invoice Deadline Extension

- Filers are entitled to request one 120-day Invoicing Extension per FRN.
- You can file an invoice deadline extension request even if you do not use or need it.
- [Extensions are filed by the applicant and service providers throughout EPC.](#)
- If the deadline to file an invoice or to request an invoice deadline extension is missed, a request for waiver of the invoice deadline must be filed with the FCC and approved before any additional payments can be made.

Pro-Tip: Review Resources for Invoicing

- Review Previous Training: E-Rate Invoicing Process (December 16, 2020)
 - [Webinar slides](#)
 - [Key Takeaways](#)
- Upcoming Training:
 - **Invoice Training - [Register](#)**
February 10 at 2 p.m. ET
- Instructional Videos
 - [FCC Form 472 \(BEAR Form\)](#) (5:20 mins)
 - [FCC Form 474 \(SPI Form\)](#) (10:36 mins)
 - [E-Rate Invoicing Open Data Set and Tool Demo](#) (25:46 mins)

Pro-Tip: Review Resources for Invoicing

- Invoicing Deadlines are subject to change based on FCDL/RFCDL
 - Use [Open Data](#) to confirm your Invoicing Deadlines
 - This data can be located in the [FRN Status dataset](#)
 - Step-by-step instructions can be found in the E-Rate News Brief: [October 22, 2021](#)
- Disbursement Data: [E-Rate Invoice Disbursements Data Lookup Tool](#)

Questions?

Ready to Get Started

Create User Profiles and Billed Entity Numbers

Before You Start: EPC Administrative Window

The EPC Administrative Filing Window is the period during which applicants can make updates to their profile information in EPC to prepare for the upcoming FCC Form 471 application filing window. During the administrative window, applicants can update their student counts, National School Lunch Program (NSLP) participation rates, contact information, and request a Category Two (C2) Budget recalculation.

When the EPC Administrative Window is Closed:

- **First-time Filers**
 - If you are new to the E-Rate program, you will need a user account in EPC.
 - For security purposes, you will also need a login and password for One Portal, our multi-factor authentication security system.
 - If you are new to the program, our Customer Service Center (CSC) at (888) 203-8100 can help you set up your organization's EPC profile and your account administrator.
- **Existing EPC User Accounts** – The EPC Administrative Window is closed. You will not be able to make changes to your EPC profile when the administrative window is closed. If you need to modify some information in an entity profile when the profiles are locked, contact the CSC for further guidance.

Organization Type: Parent Entities and Child Entities

- A parent entity makes decisions on behalf of the child entity, such as filing program forms on their behalf.
- A parent entity may also be responsible for managing their child entity's information in EPC.
- In general, organization accounts in EPC are assigned to parent entities, and their associated child entities are listed on those accounts.
- The **three most common parent-child relationships** in EPC are:
 - A school district (parent entity) to the individual schools and non-instructional facilities (NIFs) that are part of that school district (child entities).
 - A library system (parent entity) to the individual library outlets/branches and NIFs that are part of that library system (child entities).
 - A consortium leader (parent entity) to the members of the consortium (child entities).
- In general, a parent entity must have a BEN to identify itself in its role as a parent entity. The parent entity represented by this entity number is not itself eligible for discounts.

Account Administrator and User Profiles

- Every parent organization (independent school, independent library, school district, library system, consortium) in EPC needs an account administrator.
- Consultants and service providers also need account administrators for their EPC accounts.
- **Account Administrators can:**
 - Create new users
 - Modify the rights of existing users
 - Modify information about their organization
 - Link or unlink their organization to consulting firms and consortia
 - Modify (change) the account administrator
- Review the [EPC Administrative Window Webinar Slides](#) (November 18, 2021) for more background

Check The Tribal Box

- Check the “Tribal” box located in the entity profile of the E-Rate Productivity Center (EPC).
 - **For data reporting purposes**, any eligible E-Rate applicant may self-identify as a Tribal school or library in their EPC entity profile if the majority of students or library patrons served are Tribal members; the school or library is located partially or entirely on Tribal land; is a school operated by or receiving funding from the Bureau of Indian Education (BIE); or is a school or library operated by a Tribal Nation.
- Checking the box helps USAC understand who is participating in the program. We can:
 - Provide Tribal outreach and training; and
 - Assess Tribal training efforts through participation.
- [Instructional](#) video is available online and step-by-step slides are available in this slide deck’s appendix.

“Get Started” Checklist for New Tribal Libraries

- Obtain an FCC Registration Number issued by FCC’s [Commission Registration System \(CORES\)](#)
 - Gather the following information before contacting the Customer Service Center for an [EPC Account and Billed Entity Number](#) (BEN):
 - ☐ Entity’s legal name
 - ☐ Physical address
 - ☐ Mailing address or PO Box, if different than physical address
 - ☐ County name
 - ☐ Telephone number
 - ☐ Information about the organization (e.g., is it an independent library? Part of a library system? Part of a library consortium?)
 - ☐ For libraries that are part of a library system: the library system’s entity number is used to link child libraries appropriately to its parent entity (e.g., Te-Moak Tribe of Shoshone Library System is the parent entity, while the individual branches as the child entities).
 - ☐ Organization sub-type(s): public, private, religious, Tribal, new construction, etc.
 - ☐ Email address for the EPC account administrator (must be an employee of the entity organization)
 - ☐ FCC Registration Number (for all entities that file program forms)
 - ☐ The square footage of library buildings receiving discounted service, as well as whether the entity is the main branch in a library system
 - **Please designate your entity as a Tribal entity** ([instructions](#) are available) to help us track Tribal participation.
 - **Create and file your FCC Form 470** to start competitive bidding (FY2022 deadline for in-window filing is [February 22, 2022](#))
 - **Wait at least 28 Days** before filing FCC Form 471
 - **File FCC Form 471** (FY2022 deadline is [March 22, 2022](#))
 - **Retain Documentation**
- Resource:** Download a copy of the [Registration Checklist for New Tribal Libraries](#) (PDF).

Ready to start or need help?

E-Rate Customer Service Center (CSC)

(800) 203-8100

Monday through Friday between 8 a.m. and 8 p.m. ET.

Pro-Tip: Review Resources

- [Entity Numbers](#) webpage
- Review the [EPC Administrative Window Webinar Slides](#) (November 18, 2021) for more background

Questions?

Upcoming Trainings

- **FY2022 E-Rate Tribal Training Series**
 - **Session 1: E-Rate Tribal Info Session**
Today's session. A recording will be available on the [E-Rate Tribal Training](#) page.
 - **Session 2: FCC Form 470 Walkthrough for Tribal applicants (The First Form) - [Register](#)**
February 8, 2022 at 4 p.m. ET
 - **Session 3: Office Hours for Tribal Applicants - [Register](#)**
February 15, 2022 at 4 p.m. ET
 - **Session 4: FCC Form 471 Walkthrough for Tribal applicants (The Second Form) - [Register](#)**
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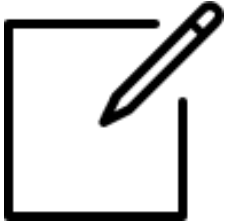
Resources

- [E-Rate Tribal Training webpage](#)
- [E-Rate Webinars](#)
- [Video Tutorials](#)
- [E-learning Modules](#)
- [E-Rate Program Applicant Document Retention List](#)

Additional Resources

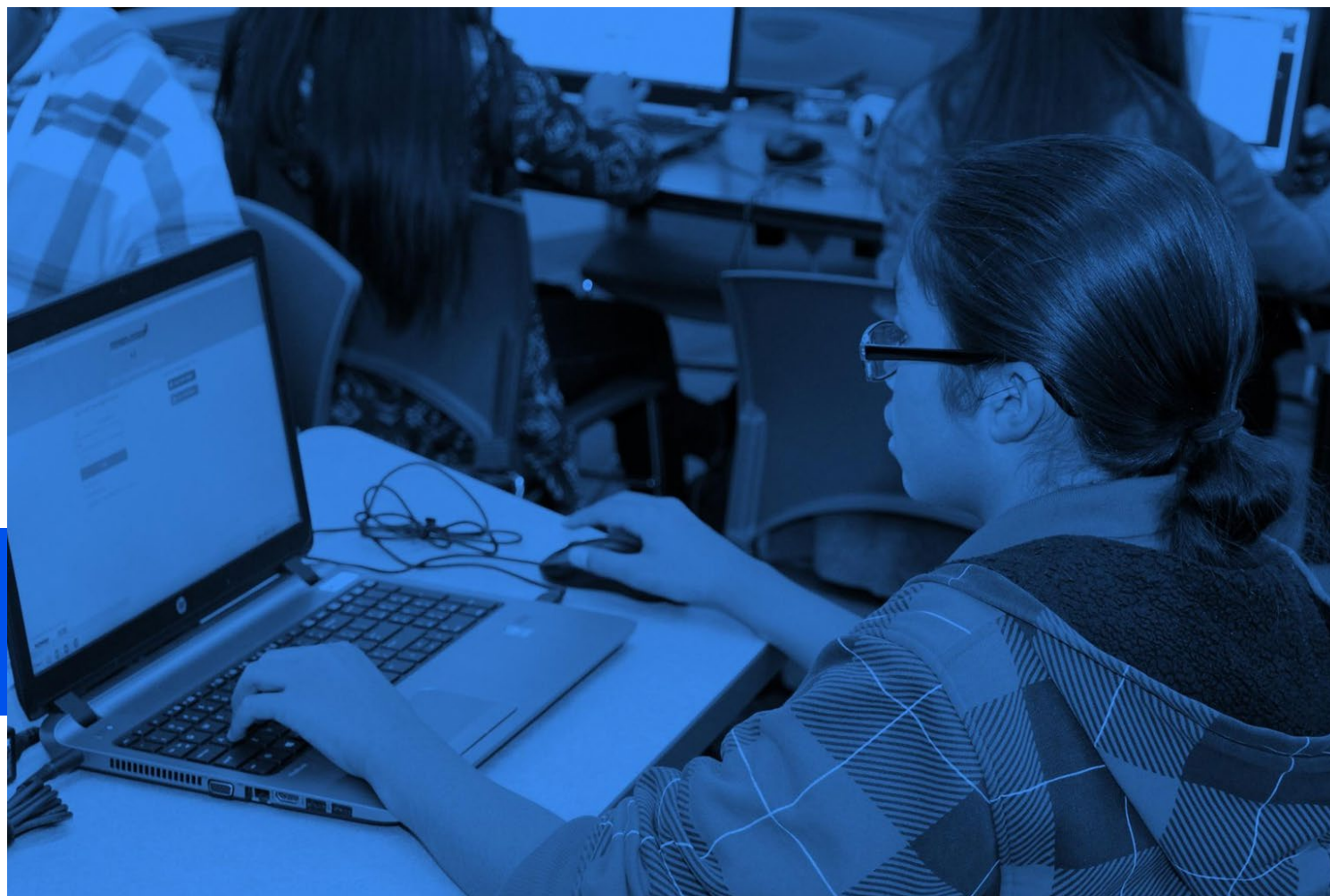
- [Subscribe](#) to the E-Rate News Brief and the E-Rate Tribal e-Newsletter
 - Deadline reminders
 - Training announcements
- Customer Service Center (CSC)
 - Call us at (888) 203-8100
 - Monday – Friday, 8 a.m. to 8 p.m. ET
- For Tribal Partners: The [USAC Tribal Liaison](#) can help guide you to public resources, call centers, or program teams. You can contact USAC's Tribal Liaison at TribalLiaison@usac.org.

Take Our Survey



- We want to hear about your webinar experience.
- Expect an email from invites@mailersurveygizmo.com with a unique survey link in 1-2 business days.
- We appreciate your feedback!

Thank You!



Appendix

Check the “Tribal” box located in the entity profile of the E-Rate Productivity Center (EPC).



Universal Service
Administrative Co.

Check The Tribal Box

- Check the “Tribal” box located in the entity profile of the E-Rate Productivity Center (EPC).
 - **For data reporting purposes**, any eligible E-Rate applicant may self-identify as a Tribal school or library in their EPC entity profile if the majority of students or library patrons served are Tribal members; the school or library is located partially or entirely on Tribal land; is a school operated by or receiving funding from the Bureau of Indian Education (BIE); or is a school or library operated by a Tribal Nation.
- Checking the box helps USAC understand who is participating in the program. We can:
 - Provide Tribal outreach and training; and
 - Assess Tribal training efforts through participation.

Finding the Tribal Entity Check Box in EPC

- Go to your landing page in the E-Rate Productivity Center (EPC).
- Find the **My Entities** section of your landing page.
- Choose an entity (school or library) to update.
- From the entity profile page, click the **Manage Organization** button in the upper right-hand corner.
 - Libraries can find the Tribal Library check box under the **Applicant Attributes** section.
 - Schools can find the Tribal School check box under the **School Information** section.
- Review the [Instructional Video](#) (3:00 min)

Step One

- Choose the entity (school or library) you want to update.

My Entities

Entity	Entity Number	City	State	Zip Code
Library System 13001	8810	Washington	DC	20036
Library 1 In System 13001	9077	Alexandria	VA	23257
Library 2 In System 13001	9079	Alexandria	VA	23687
Library 3 In System 13001	9081	Alexandria	VA	23171
Library 4 In System 13001	9083	Alexandria	VA	23159

Step Two

- Click the **Manage Organization** button.

NewsTasks (2)RecordsReportsActions

Records / Applicant Entities

#9077 - Library 1 In System 13001

MANAGE ORGANIZATION

MANAGE ANNEXES

Summary

Modifications

Additional Information

Category Two Budget

Contracts

FCC Forms

News

Related Actions

Organization Details

Name

Library 1 In System 13001

Entity Number

9077

FCC Registration Number

0123456789

Applicant Type

Library

Status

Active

Contact Information

Physical Address

1 Main Street
Alexandria, VA 23257

Phone Number

123-456-7890

Mailing Address

1 Main Street
Alexandria, VA 23257

Email

library_1_system_13001@mailinator.com

Website URL

Applicant Attributes

Latitude

Not Found

User-Entered Latitude

Longitude

Not Found

User-Entered Longitude

Urban/Rural Status

Not Found

User-Entered Urban/Rural Status

Rural

Library Sub-Type

☒ Public Library

☐ Private Library

☐ Academic

☐ Research

☒ Tribal Library

☐ Bookmobile

☐ Kiosk

☐ New Construction Library

Is this library part of a library system?

Yes

Square Footage

7000

Locale Code

12

Main Branch located in School District

CHAPEL HILL-CARRBORO CITY DIST (BEN 15747)
CHAPEL HILL, NC

116

Step Three

- For Tribal libraries, check the “Tribal Library” box in **Applicant Attributes**.

▼ Applicant Attributes
Latitude Not Found
Longitude Not Found
Urban/Rural Status Not Found
Library Sub-Type
☒ Public Library
☐ Private Library
☐ Academic
☐ Research
☒ Tribal Library
☐ Bookmobile
☐ Kiosk
☐ New Construction Library
☒ Main Branch
☐ State Library Agency - Library

Step Four

- For Tribal schools, check the “Tribal School” box in **Applicant Information**.

Applicant Information

Latitude

Not Found

Longitude

Not Found

Urban/Rural Status

Not Found

School Sub-Type

☒ Public School

☐ Private School

☐ Pre-K

☐ Head Start

☐ Adult Education

☐ Juvenile Justice

☐ Dormitory

☐ Charter School

☐ Tribal School

☐ New Construction School

☐ Swing Space

☐ Detention Center

☐ General-Use School

☐ ESA School

☐ BIE

☐ ESA School District with no Sc

Is this school part of

Yes



Universal Service
Administrative Co.