



E-Rate: Tribal Teleconference

E-Rate Program Participant Webinar

April 14, 2026

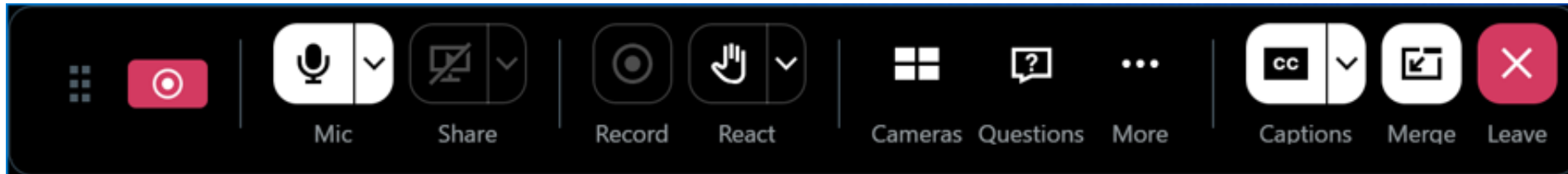
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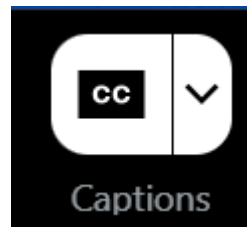
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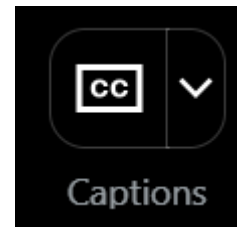
- Attendees control their own captioning



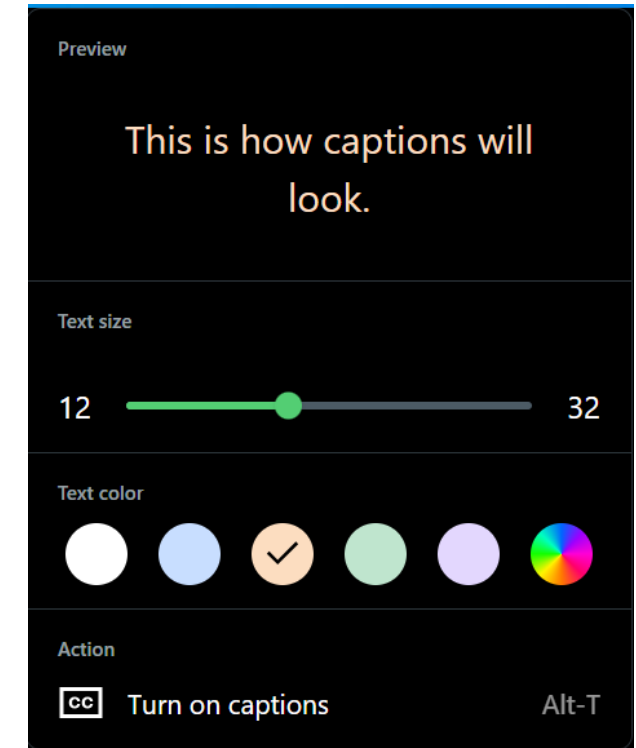
- You control the **font size** and **color** on CC
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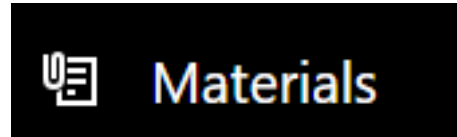


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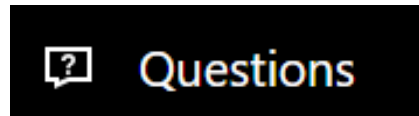


Housekeeping – Materials & Questions

- A copy of the slide deck is in the **Materials** section of the webinar panel



- Enter questions at any time using the **Questions** box



- If the slides freeze, restart the webinar

Questions ×

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No questions yet

Questions you send and answers from the staff will appear here

Enter your question

Your question will be sent to staff Send

E-Rate Customer Service Center (CSC)



Call us at (888) 203-8100

Monday – Friday 8 a.m. to 8 p.m. ET



Create a customer service case

1. Log in to the [E-Rate Productivity Center \(EPC\)](#)
2. Select the **Contact Us** link from the upper right menu on the landing page.

Meet Our Team



Cedric Watkins

Tribal Library Advocate and Analyst | E-Rate

Communicates the E-Rate program's objectives and policies with stakeholders.

Cedric.Watkins@usac.org



Gem Shandiin Labarta

Tribal Liaison | Shared Services

Provides clear, accurate, real-time support to Tribal stakeholders.

Gem.labarta@usac.org

Upcoming Dates

- May Tribal Teleconference
 - One USAC – May 12, 2026, at 4 p.m. ET – [Register](#)
- Rural Health Care
 - Authorizations and User Management in RHC Connect – April 15, 2026, at 2 p.m. ET – [Register](#)
 - Consortium Best Practices – April 22, 2026, at 2 p.m. ET – [Register](#)
- Lifeline
 - Understanding and Resolving National Lifeline Accountability Database (NLAD) Error Codes – May 13, 2026, at 3 p.m. ET – [Register](#)
- Service Providers
 - Office Hours: How to Fill Out an FCC Form 499-Q – April 14, 2026, at 2 p.m. ET – [Register](#)

Agenda

- FY 2026 Updates & Reminders
- Understand the E-Rate Program
- Starting the Competitive Bidding Process
- Applying for Discounts
- Program Integrity Assurance
- Certify Compliance
- Invoice USAC
- Appeal a USAC Decision

Funding Year 2026 Program Updates and Reminders

FY2026–FY2030 Category Two (C2) Budget Management

FY2026 is the first year of the FY2026-FY2030 C2 funding cycle.

- Unused funds from the FY2021-FY2025 C2-budget will not roll over.
- To get a forecasted estimate of the C2 budget, use the [E-Rate C2 Budget Tool FY2021+](#). The tool provides data on the C2 budget cycles. It is available on the [Tools](#) page along with a [video](#) on how to use the tool and a [glossary of terms](#).
- **Applicants will be required to validate their student counts or library square footage in the first year they apply for C2 support during the FY2026-FY2030 cycle.**
- For more information, please visit our [Category Two Budgets](#) webpage and our [Category Two Budget Management Guide](#).

FY2026-2030 C2 Budget Cycle Updates

FY2021-2025 C2 Budget Cycle

Libraries

- \$4.50/square foot
- \$25,000 funding floor
- Tribal libraries were eligible for a \$55,000 funding floor

Schools

- \$167/student
- \$25,000 funding floor

FY 2026-2030 C2 Budget Cycle

Libraries

- **\$5.43/square foot**
- **\$30,175 funding floor**
 - This means a library with less than 5,558 square feet ($\$5.43/\text{square foot} * 5,557 \text{ square feet} = \$30,174.51$) is eligible for the funding floor of \$30,175.
- Tribal libraries are eligible for a \$66,385 funding floor.
 - This means a Tribal library with less than 12,226 square feet ($\$5.43/\text{square foot} * 12,225 \text{ square feet} = \$66,381.75$) is eligible for the Tribal library funding floor of \$66,385.

Schools

- **\$201.57/student**
- **\$30,175 funding floor**
 - This means a school with fewer than 150 students ($\$201.57/\text{student} * 149 \text{ students} = \$30,033.93$) is eligible for the funding floor of \$30,175.

SAM.gov Unique Entity Identifier (UEI) Requirement

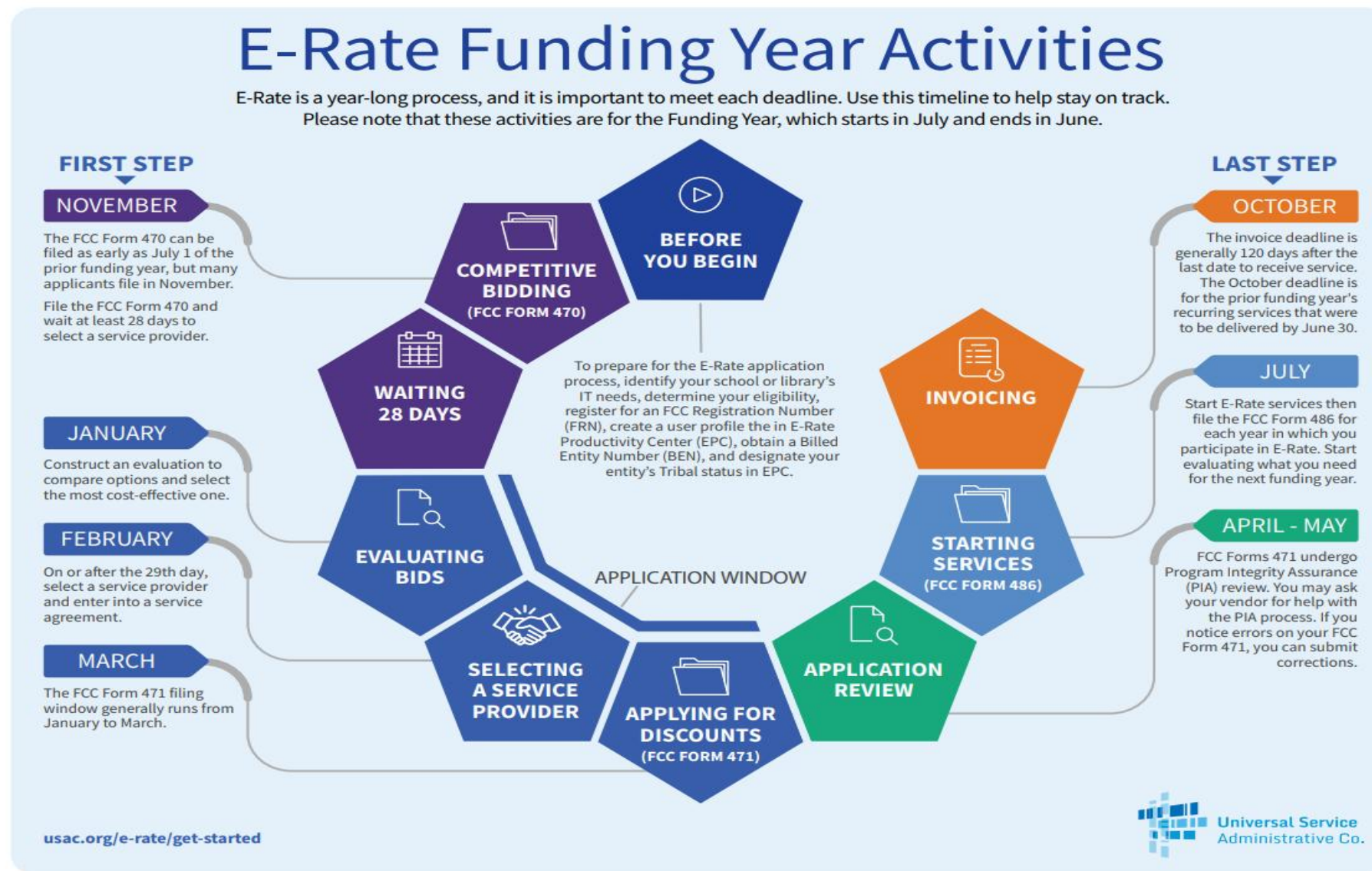
- Beginning August 2026, USAC will begin using SAM.gov banking information to remit payment for all Universal Service Fund (USF) invoices and requests for reimbursement.
- **All service providers and all E-Rate participants that use the BEAR invoicing method to receive USF disbursements** must have a Unique Entity Identifier (UEI) on their FCC Form 498, an active SAM.gov account, **and** must have a valid bank account associated with the SAM.gov account.
- Service providers and E-Rate participants who receive funding from USAC should confirm that their FCC Form 498 includes a UEI and active SAM.gov account and that it is connected to the correct bank account—specifically, the bank account that is designated to accept USF disbursements. To prepare for this change, USAC will contact service providers and E-Rate applicants by email to ensure they met these requirements.
- Service providers and E-Rate applicants that do not have an UEI, and those that only have a SAM.gov generated UEI but not an active SAM.gov account connected with a bank account, must visit SAM.gov and complete the registration process. **This process can take up to six weeks, so USAC recommends starting as soon as possible.**
- Service providers and BEAR applicants will have to annually register with SAM.gov to keep their account active. USAC will not be able to process disbursements if the payee's SAM.gov account is inactive.
- For more information, visit USAC's [SAM.gov UEI Requirement webpage](#).

Understanding the E-Rate Program

Program Overview

E-Rate Funding Year Activities

E-Rate is a year-long process, and it is important to meet each deadline. Use this timeline to help stay on track. Please note that these activities are for the Funding Year, which starts in July and ends in June.



Applicant Process - Overview

Pre-Commitment Steps

Request services
(FCC Form 470),
run a competitive bid
process, and select a
vendor

Request funding
(FCC Form 471)
and undergo
application review

Post-Commitment Steps

Confirm the start of
services and status of
Children's Internet
Protection Act
(CIPA) compliance
(FCC Form 486)

Request
reimbursements **(FCC
Form 472)**
OR receive discounts
(FCC Form 474)

- [E-Rate Program At a Glance for New Applicants](#)
- Call our Customer Service Center at (888) 203-8100 to set up an account in the E-Rate Productivity Center (EPC) and make sure your school or library has a Billed Entity Number (BEN).

Know Your Role

Applicants	Service Providers
<ul style="list-style-type: none"> • Determine services needed, file FCC Form 470 (and Request for Proposal (RFP), if desired). • Run competitive bidding process. • Select the most cost-effective bid. • Respond to Program Integrity Assurance (PIA) review. • File other applicant forms (FCC Forms 471, 486, 472, 500, etc.). • Document compliance with FCC rules on an ongoing basis. • Retain documentation for at least 10 years from last date of service delivery. 	<ul style="list-style-type: none"> • Respond to FCC Form 470 and RFP. • May assist with responding to Program Integrity Assurance on technical services questions (but not competitive bidding). • File service provider forms (FCC Forms 473, 474, etc.). • Document compliance with FCC rules on an ongoing basis. • Retain documentation for at least 10 years from last date of service delivery. • Contribute to the Universal Service Fund, even if not participating in the E-Rate Program. See the Service Providers page on USAC's website.

Starting the Competitive Bidding Process

Competitive Bidding

The **applicant** starts the [competitive bidding process](#) by posting an FCC Form 470 and Request for Proposal documents, if applicable, to the USAC website.

- These include specific requirements for service providers to follow during the competitive bidding process.
- Use the [FCC Form 470 Tools](#) within Open Data to view and export requested services details.

Service providers [review the information and bid on the requested services](#).

- Submit bids, including all information requested by the applicant, using the method provided in the FCC Form 470 or RFP documents.
 - Can be found typically through an email or online form.
- The bid should include information on E-Rate eligibility percentage and category of service.
- The bid should be responsive to the services being requested.

How Applicants Select a Service Provider

- Applicants must wait **at least 28 days** after certifying their FCC Form 470, and then they:
 - [Evaluate the bids received](#) (See [sample evaluation matrix](#))
 - Select a service provider **on or after the 29th day**
 - The day the applicant certifies the FCC Form 470 counts as Day 1. For example, if they file and certify an FCC Form 470 on September 1, they may select a service provider on or after September 29.
- **The price of eligible equipment and services** must be the **primary** selection criterion (weighted more heavily than any other single criterion).

Open and Fair

- **Open** = there are no secrets in the process; information shared with one bidder must be shared with all.
- **Fair** = all bidders are treated the same, fairly, and equally.

See the [Open & Fair Process](#) page on our website for more information.



How Applicants Select a Service Provider (cont.)

- Applicants must first [enter into an agreement](#) to provide services. They are required to wait at least 28 days. In some cases, the applicant's state or local procurement rules or regulations may require them to wait longer.

Services can start on or after July 1. Be sure that eligible equipment and services are delivered:

- To the right recipient of service
 - In the correct quantities and rates
- See the updated [28-Day Waiting Period](#) page for more information.

Applying for Discounts

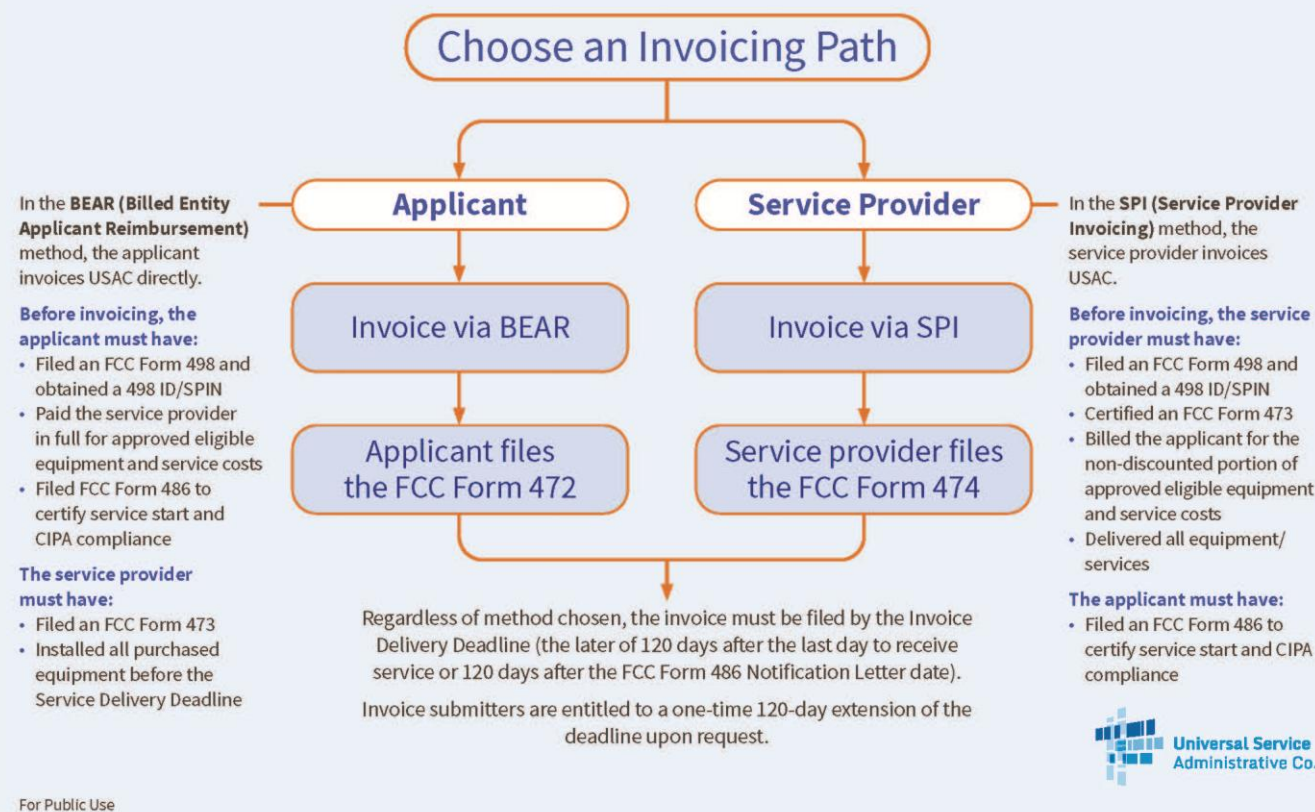
FCC Form 471 Overview

- Applicants file an [FCC Form 471](#) (Description of Services Ordered and Certification Form) to request funding for eligible services and equipment for the upcoming funding year.
- Applicants must:
 - Include information on the recipients of services and service provider(s);
 - Provide detailed descriptions of services including costs and dates of service and/or the requested equipment; and
 - Certify compliance with program rules.
- The filing window for the FCC Form 471 – generally opens in **mid-January** and **closes in mid-March**. This year, it runs from January 21 until April 1.
- You can file FCC Form 471 after you have completed your competitive bidding process (FCC Form 470), waited 28 days, selected your vendor(s), and signed contract(s) (if appropriate).

Select an Invoicing Method

Select an Invoicing Method in E-Rate

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



Your FCC Form 470 and FCC Form 471 Must Match

- Your FCC Form 471 must only request equipment and services cited from the FCC Form 470.
- Applicants should ensure that all equipment/services being requested on the FCC Form 471 were competitively bid via the FCC Form 470.
- If you bid for two Category Two (C2) service types on your FCC Form 470 and invoice USAC for three C2 service types, this implies that additional information, other than what was competitively bid for, may have influenced the selection of service provider.
 - This discrepancy **cannot** be corrected after competitive bidding ends.
 - You are allowed to select all three service types on your FCC Form 470 if you are unsure of what service types will be provided.
 - To avoid a competitive bidding violation, if there is time before the FCC Form 471 deadline, you would need to recertify a new FCC Form 470 with the additional service type, wait an additional 28 days, and select a service provider **after** the updated 28th day.

Retain Documentation

- Applicants and service providers must [retain all documentation](#) for at least 10 years after the latter of the last day of the applicable funding year or the service delivery deadline for the funding year.
 - For example, FY2025, the last day to receive service is June 30, 2026. Documents would need to be retained until June 30, 2036.
- Winning service providers must retain records related to the purchase and delivery of E-Rate eligible equipment, signed and executed contracts, bidding information, invoices, provision of services, and other matters relating to equipment and services.
- Records can be kept electronically.

Program Integrity Assurance

What Is PIA?

- After you file and certify an FCC Form 471 within the filing window, Program Integrity Assurance (PIA) reviewers at USAC check the information on your form for completeness and accuracy and may have additional questions for you to answer.
- Applications go through an initial review and a final review, which may involve questions from PIA reviewers on one or more of the following topics:
 - Eligibility of the entities receiving service;
 - Eligibility of the equipment/services requested;
 - Discount calculations;
 - Contracts; and
 - The competitive bidding process.

Responding to PIA Inquiries

- To avoid delays, provide:
 - Complete responses to all questions; and
 - All requested documentation.
- Who can respond to PIA inquiries?
 - Applicants or authorized representatives of applicants.
 - Service providers **can** assist applicants with PIA inquiries about the equipment/services being provided.
- Contact your reviewer with questions.

Funding Commitment Decision Letter (FCDL)

- When the PIA review is complete, applicants and service providers receive a **Funding Commitment Decision Letter (FCDL)** in their EPC News Feed that they should review carefully.
- The FCDL includes:
 - Approved funding amounts;
 - Modified or denied funding amounts along with the reason(s) for the changes; and
 - Next steps in the E-Rate process.

After Receiving the FCDL

- After the FCDL is delivered, applicants can:
 - Discuss service details with their service provider(s).
 - File the [FCC Form 486](#) once services have started.
- If applicants or service providers disagree with one or more of the decisions in the FCDL, they can [appeal](#) to USAC.
 - Appeals must be lodged within 60 days of the date of the letter.
 - Appeal decisions are delivered via **Revised Funding Commitment Decision Letters (RFCDLs)**.

Questions?

Certify Compliance

Children's Internet Protection Act (CIPA)

- Requires that schools and libraries enforce certain safety measures preventing minors from accessing obscene content on the internet.
- Entities must keep records.
 - Schools and libraries must [maintain documentation](#) demonstrating their CIPA compliance.
 - Maintain documentation showing CIPA compliance for all funding years.
 - In the first year, they may show work toward CIPA compliance unless granted a waiver for the 2nd year. They must be compliant by the 3rd year.
- **Three requirements** of CIPA compliance are:
 - Internet Safety Policy
 - Technology Protection Measure
 - Public Notice and Hearing or Meeting

**FCC Form
473**

Service Provider Annual Certification (SPAC)

- [FCC Form 473](#) (Service Provider Annual Certification (**SPAC**)) is completed by the service provider, who certifies that they will comply with Schools and Libraries (E-Rate) program rules and guidelines.
- SPACs must be filed for **each funding year** a service provider participates in the E-Rate program.
 - Failure to submit a SPAC prevents invoicing USAC by neither the applicant nor the service provider, (depending on the mode selected).
- SPACs are filed through USAC's E-Rate Productivity Center (EPC).
 - Only **full-rights users** can complete and certify an FCC Form 473.
- SPACs are required to be submitted at the [Service Provider Identification Number](#) (SPIN)/498 ID) level. FCC Form 473 must be on file with USAC **before USAC pays an invoice**.
- To quickly review which funding years have completed FCC Form 473 on file with USAC, login to EPC. The information is found on the landing page for your SPIN.
- SPACs may be filed as soon as the FCC Form 471 application filing window opens for the upcoming funding year.

Service Provider Annual Certification (SPAC)

- On May 7, 2025, the FCC released order [DA-25-394](#).
- In this order, the FCC has directed USAC to refer service providers to the FCC Enforcement Bureau, on a go-forward basis, who have refused or failed to submit their annual FCC Form 473 (SPAC), which prevents applicants from receiving reimbursement through the BEAR invoicing process.
- For additional information on FCC Form 473 (SPAC), check out the [e-Learning Module](#).

Invoice USAC

Invoicing Prerequisites

- The applicant and service provider must have **received a [Funding Commitment Decision Letter \(FCDL\)](#)** with a positive commitment.
- The applicant must have **certified an FCC Form 486** and established the actual service start date for their Funding Request Number(s) (FRN(s)).
 - USAC must have reviewed and approved the FCC Form 486 (See [FRN Status Tool](#)).
- The service provider must have **certified an FCC Form 473** in EPC for each SPIN that will be featured on an invoice for that funding year (See [FRN Status Tool](#)).
- The service provider must have started the installation/delivery of funded equipment and services.
- The invoice must be filed before the Invoice Deadline Date.
- Invoice USAC **only** for your FCC Form 471 approved eligible equipment and services, in the correct quantity and rates, and delivered only to the approved Recipients of Service (ROS).
- Invoiced amount must be for **actual charges up to the amount committed** through the E-Rate program. Billed rates must not exceed the contracted rates. USAC will only pay up to the contracted rate.

Invoicing Prerequisites

- Discuss who will be filing invoices and the difference between **BEAR/SPI** methods with the applicant.
 - Billed Entity Applicant Reimbursement (BEAR) invoicing: Applicant invoices USAC
 - Service Provider (SPI) invoicing: Service provider invoices USAC.
- This decision is made on a per-FRN basis and is the **applicant's choice**.
- Once USAC processes an invoice for an FRN, the [invoicing method](#), or "mode" (BEAR or SPI), is set and cannot be changed without formal approval.
- Make sure that you have the **most recent commitment information** from either the FCDL or the [Revised Funding Commitment Letter](#) (in case of post-commitment changes) including discount rate, approved cost of service, FCC Form 471 number, FRN, any service substitutions, etc.

Billed Entity Applicant Reimbursement (BEAR) Invoicing

- Applicant pays the service provider in full.
- Applicant invoices USAC the discounted portion of the bill for approved equipment and services delivered to the approved Recipient(s) of Service at the quantities and rates not to exceed what was listed on the FCC Form 471.

Service Provider Invoicing (SPI)

- **The service provider bills the applicant** for any costs for **ineligible** portions/services and **non-discounted share** before submitting the FCC Form 474.
- Applicant pays the service provider for **ineligible** portions/services and the **non-discount share**.
- Service provider invoices USAC for the discount amount using the FCC Form 474.
- Service providers file the FCC Form 474 in EPC. Only full rights users can:
 - Certify an FCC Form 474.
 - Complete the entire process of submitting and certifying an invoice.

Note: Users with partial rights can send submissions to full right users for certification. These rights are assigned by the Account Administrator.

- The invoiced amount must be actual charges, not the amount **committed** on the Funding Commitment Decision Letter.
- Only include [eligible services](#) on service provider invoices.

Applicants Must Pay Their Non-Discount Share

Regardless of which invoice method has been selected, **all** E-Rate applicants must [pay their non-discount share](#).

- Service providers cannot pay (directly or indirectly) for the applicant's non-discount share.
- Funds cannot come from the service provider or an entity controlled by the service provider.
- Service provider bills cannot be ignored or waived.
- If the applicant cannot show proof of payment during invoice review, the invoice (whether from the applicant or the service provider) may be denied.

Appeal a USAC Decision

When to File an Appeal

- If you disagree with a USAC decision, you have 60 days from the date of that decision to request a **review of the decision**. This request is called an [appeal](#).
 - File your appeal in the E-Rate Productivity Center (EPC).
 - To appeal a decision from funding year 2015 or prior, create a customer service case in EPC, or you may submit an appeal directly to Appeals@usac.org.

Include Pertinent Information in Your Appeal

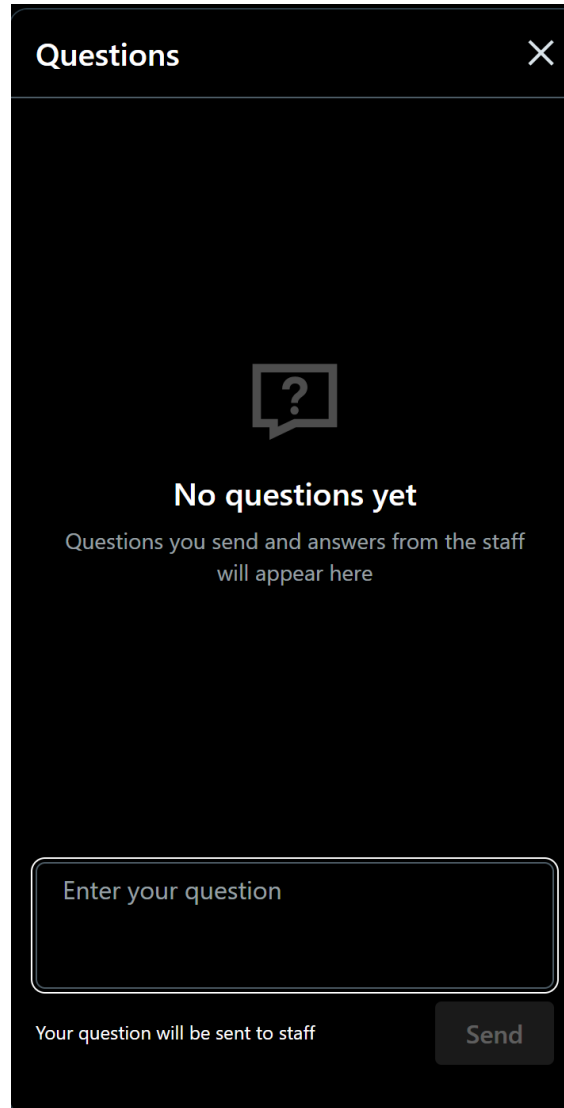
- Applicant's billed entity number (BEN) or Service Provider's SPIN
- Contact information including name, address, telephone number, and email address of the person who can discuss the appeal with USAC in detail
- Nickname for the appeal (to help you identify the appeal)
- Funding year of the decision being appealed
- Funding Request Numbers associated with the appeal

Granting Appeals

- USAC may grant appeals under the following limited circumstances:
 - When the appeal makes clear that USAC made an error in its initial review (for example, the PIA reviewer made an error).
 - You provide USAC with new information and/or documentation it did not provide when the original request was made.
 - When USAC receives a policy clarification, or a new policy impacts the original decision.
- If you are seeking a waiver of an FCC rule, you must file a waiver directly with the FCC.
 - For example, requests to consider FCC Forms 471 filed after the window closed must be directed to the FCC as a window waiver request.

Live Q&A

- Submit your questions about today's topics:
 - FCC Form 471 Review Process
 - Preparing for a PIA Review
 - PIA Inquiries
 - Selective Review
 - Funding Commitment Decision Letters



Questions

?

No questions yet
Questions you send and answers from the staff
will appear here

Enter your question

Your question will be sent to staff

Send

Q&A Tips

- ✓ Type your queries into the “Questions” box in your webinar control panel.
- ✓ Write in full sentences.
- ✓ Ask one question at a time.
- ✓ Click the box to expand it and see all the written answers.

Questions?

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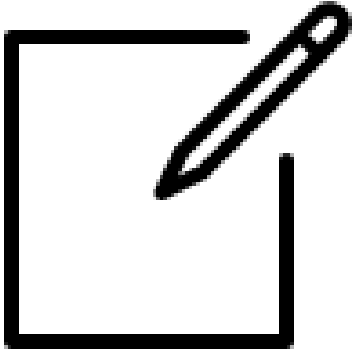
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**Universal Service
Administrative Co.**