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Filing FCC Form 470 – Description of Services Requested and Certification Form

Form Assistance
You can find information about this form and the competitive bidding process on the FCC Form 470 Filing webpage.

If you have any questions about completing this or other universal service forms, please contact the Schools and Libraries (E-rate) Program Client Service Bureau (CSB) at (888) 203-8100 between 8:00 a.m. and 8:00 p.m. ET. You can also create a customer service case by selecting the Contact Us link on either your landing page or using the Actions tab in the E-rate Productivity Center (EPC):

- The Reports tab > My Landing Page; or

![My Landing Page screenshot]

- The Actions tab

![Actions tab screenshot]
EPC Account User Rights

User Accounts
To request a user account, contact CSB. For information on how to contact CSB, see Form Assistance in this user guide.

User Roles and Permissions
Only you and your organization’s consultants (if you are using a consultant) may file program forms on behalf of your organization. Permission rights are provided on a “form type” basis — that is, applicants and their consultants may have different rights for different FCC forms.

Available rights for the FCC Form 470 form include:
- **Full rights** – Can start, edit, and certify the form.
- **Partial rights** – Can start and edit the form, but cannot certify the form. (The form is automatically routed to the organization’s full-rights users for certification.)
- **View-only rights** – Can view forms created by other users; cannot start, edit, or certify forms.

Only an organization’s EPC account administrator can modify permissions. The EPC account administrator can use the Manage Organization function to change the organization’s profile, add users and modify permissions. Any changes made to the organization’s profile are automatically populated in the form up until the time the form is certified. You can also call CSB for assistance with modifying permissions.

EPC Form Navigation

Progress Bar
The progress bar at the top of each form page helps you track the progress of completing the form.

<table>
<thead>
<tr>
<th>Basic Information</th>
<th>Service Requests</th>
<th>Technical Contact Information</th>
<th>Procurement Information</th>
<th>FCC Form 470 Review</th>
<th>Certifications &amp; Signature</th>
</tr>
</thead>
</table>

Saving, Sharing, and Discarding the Form
The bottom of each page provides you with these options:

- **Back** – Go back to the previous page.
- **Discard Form** – Discard the entire form. When you confirm that you want to discard a form, the draft form will no longer be available in USAC’s system.
- **Save & Share** – Send the form in its current state to another partial or full-rights user in your organization. Once shared, the form appears in the **Tasks** list of the new user, who can edit or certify the form, depending on permissions.
**NOTE:** If you choose this option, the form will disappear from your *Tasks* list. You *will not be able re-enter the form* unless the new user saves & shares with you.

- If a form has been shared with you:
  1. Go to your *Tasks*
  2. Select *Create FCC Form 470*
  3. Accept the task to view, edit or complete the form.

- **Save & Continue** – Save the form so it appears in your *Tasks* list with the most recent edits and proceed to the next page to continue entering form information.

**Exiting the Form and Returning Later**
Select **Save & Continue** before you exit the form. When you return, select the task name on the *Tasks* tab to start from where you left off on completing the form.

**Required Fields**
Required fields are followed by a blue asterisk (*).

**Red System Prompts**
While filling out your form, you may receive system messages in red that provide information about data validation or mandatory fields if the field is not filled out correctly or is missing required information.
Online Help
To display additional information about a specific field in the form, select the adjacent question mark icon, and hover text will appear.

Pop-Up Confirmation Messages
The EPC system displays pop-up messages to verify that you want to take certain actions within the form. For example, when you click the Discard Form button, a pop-up message will inform you of the following:

- Your form will be canceled.
- Your form will no longer be retrievable.

If you do not wish to proceed, this pop-up message provides you with an opportunity to cancel a proposed action.

Follow a Record
You can receive alerts about a form in your News tab by following the record.

- To Follow a record, select the newspaper icon with a + plus sign in the upper right corner of the form’s main page. Once the icon includes a ✓ check mark, you will be following this specific form and will receive news alerts.
- To Unfollow the form and stop receiving news alerts, select the same icon, and you will see a + plus sign again.

Followed  Unfollowed
Begin the Form: Basic Information
Organization Details and Application Nickname

1. Log in to the E-rate Productivity Center (EPC).
2. On My Landing Page, select FCC Form 470.

3. Review Billed Entity Information. If it is incorrect, contact your EPC account administrator to update your organization’s profile. You may also call CSB for assistance. When the information in your EPC profile is updated, the entity information is automatically updated in the FCC Form 470.
4. Enter an Application Nickname of your choosing to help you quickly identify and receive information about your form. Choose a nickname that you will remember and helps meet your record keeping needs. The nickname can be very simple; for example, if you are filing two FCC Forms 470, one nickname might be Category One and the other Category Two.
5. When you finish reviewing the information on this page, select Save & Continue to continue to the next page.

Application Type and Recipients of Service
The Basic Information for your organization includes:
- Applicant type (e.g. library, school district)
- Number of eligible entities (i.e. how many eligible schools are in the school district)
- Recipients of service (i.e. who will receive the services requested on this form)
1. Review the information on this page.
2. To make changes, contact your EPC account administrator or create a customer service case to request updates to your applicant entity’s profile. These updates will then populate in your form if the form has not yet been certified.
3. After you finish reviewing the information, select Save & Continue to go to Consultant and Contact information.

Consultant and Contact Information

The Consultant and Contact Information page on the form identifies your consultant(s). Consultant information also appears in the organization profile under Additional Information → Related Organizations → Consulting Firms section, when applicable.

**NOTE:** Consultant information must appear in this section of the form if you are using one or more consultants.

1. Under Consultant Information, review consultants associated with your organization.

2. If you have a consultant(s) and do not see them listed, contact your EPC account administrator or create a customer service case to request updates to your applicant entity’s profile. These updates will then populate in your form if the form has not yet been certified.
3. Under **Contact Information**, select **Yes** or **No** to identify whether you are the main contact person for your FCC Form 470.

If you select **Yes**, the page automatically populates with your information.

If you select **No**, enter the contact person’s name or email address to initiate a search for the contact person. Once the contact person is identified through the search, the saved information for the contact person will populate the field and appear on the page.

**NOTE:** Only an individual who is associated with your organization can be a contact person.

4. Select **Save & Continue** to proceed to the next page.

### Service Requests

The **Service Requests** section identifies the **category or categories of service** and the service types for which you are seeking bids, identifies details about the services, and allows an upload of associated documents or “RFPs.” The Eligible Services List (ESL) for each funding year provides guidance on the eligibility of products and services under the E-rate Program.

#### Categories of Service for Bids

1. Select **Category One**, **Category Two**, or both to indicate the service(s) for which you are requesting bids.

   **Category 1**
   - Data Transmission and/or Internet Access

   **Category 2**
   - Basic Maintenance of Internal Connections
   - Internal Connections
• Managed Internal Broadband Services

2. Select **Save & Continue** to proceed to uploading RFPs.

Request for Proposals (RFP) for Service Requests

RFP documents provide more details about your requests for potential bidders. Some services require an RFP. For more guidance, visit our website.

**NOTES:** If you include an RFP with your FCC Form 470, it must be uploaded prior to certifying the form. If you are uncertain whether or not you will provide an RFP, you may upload a placeholder document and replace it later.

- Prior to certifying your FCC Form 470, you may upload and remove RFP documents.
- After the form is certified, you may add additional documents, but you cannot remove RFP documents attached to your FCC Form 470.

Upload an RFP

1. If you are issuing an RFP document for requested services, select **Yes**. Otherwise, select **No** and **Save & Continue** to proceed to the next page.
2. If you select **Yes**, either select **UPLOAD** to choose the document from its location on your computer or drag the document from your computer onto **Drop file here**.

**NOTE:** Always upload a copy of the actual RFP document. Do not upload a document that only contains a link to the RFP.

3. Inspect the uploaded RFP document to confirm it was uploaded.

**Remove an RFP**

An RFP document can only be removed when it is not associated with another service request.

1. Hover-over the uploaded RFP icon until it turns into an “X.”

2. Select the “X” to delete the uploaded document.

**Assign RFPs to Service Requests**

The **RFPs for Service Requests** page indicates the RFP documents to be used for service requests. If an RFP document applies to specific services only, you will be able to assign the RFP document to a specific request later during the form completion process.

1. Select the checkbox(es) next to the RFPs that apply to all new Category One and/or all new Category Two services.
2. Select **Save & Continue** to add service requests.

**Service Requests**

This page allows you to add, edit, or remove services requests and provide additional information.

**Add Narrative**

This page features a **Narrative** field which can be used to provide potential bidders with additional information about specific services that may help them respond with a bid. Complete the **Narrative** section with information such as:

- A summary of the service.
- Information that applicants want to communicate to potential bidders.
- Disqualification factors.

**NOTE:** Narrative information should not conflict with RFP content.

1. When the narrative is complete, select Add New Service Request for Category One, and continue to the next page. If you are only requesting Category Two services, go to the Category Two Service Requests section below.

**Category One Service Requests**

1. First you will assign your service requests with a specific “function” from a drop-down menu.

**NOTE:** The drop-down menu for Category One services on the FCC Form 470 changed on July 1, 2018. The new menu options will apply to FCC Forms 470 filed for FY2019.
2. Choose the Function that applies to your request from the drop-down menu and select Add.
Please select the option below that matches the services for which you are seeking bids.

### Add New Service Request

**Function**

- Internet Access and Transport Bundled (non-fiber)
- Transport Only – No ISP Service Included (non-fiber)
- Internet Access: ISP Service Only (no transport circuit included)
- Leased Dark Fiber and Leased LiFiber
- Self-Provisioned Network (Applicant Owned) and operated Network and Services Provided Over Third-Party Networks
- Network Equipment
- Maintenance & Operations
- Cellular Data Plan/ Air Card Service
- Other

*Please select a value*
3. After the screen refreshes, enter service details for all the required fields.

**NOTE:** The information requested will vary according to the function you choose.

**Example:**
- **Quantity** – The number of items you are requesting.
- **Unit** – Automatically populates based on the selected function.
- **Number of entities served** – The number of schools and/or libraries that will receive this service.
- **Installation, Activation and Initial Configuration** – **Yes** or **No** based on your needs.
- **RFPs** – Select any RFP(s) that apply to the requested service. **NOTE:** RFPs are automatically associated with this request if you previously indicated that an RFP applied to all Category One services.

After you enter the requested information, select Add.

4. To enter an additional service request, select **Add New Service Request** again and repeat the steps above; or
5. To edit an existing service request, select the service request line and then select **Edit Service Request**; or

6. To delete a service request, select the line and then select **Remove Service Request**.

7. Before continuing to Category Two service requests, complete the **Installment Payment Plan** section (if applicable), located under Category One service requests.
Installment Payment Plan

**NOTE:** This section will only appear for service requests that could include special construction charges.

1. Select **Yes** if you seek an installment payment plan for the non-discount portion of special construction charges associated with a service request(s). Select **No** if you are not seeking an installment payment plan. (For more information, see the Eligible Fiber Services FAQs, Question #35.)
2. If you selected **Yes**, enter information in the required fields:
   a) Use the drop-down menus to select the minimum and maximum years (1 to 4) for the installment payments.
   b) Select the radio button to indicate your payment preference (**Annual** or **Monthly**).
3. If you have Category Two service requests to enter, scroll to the next section. If you do not have Category Two service requests, select **Save & Continue** to proceed to the next page.
Category Two Service Requests
Add Internal Connections, Basic Maintenance of Internal Connections, and Managed Internal Broadband Services Requests

1. Under **Service Requests: Category Two**, complete the **Narrative** field.
2. Select **Add New Service Request**.

3. On the **Add New Service Request** page:
   a) Select the **Service Type**. (If you are not sure which service type to request, consult the [FCC’s Eligible Services List](#). You may also contact CSB for further assistance.
   b) Select the **Function** and then select **Add**.

4. After the screen refreshes, enter service details for the selected function type.
5. After you enter the details, select **Add**.
6. To add additional Category Two requests select **Add New Service Request** and **repeat the steps above**. The steps to add requests for Basic Maintenance of Internal Connections and Managed Internal Broadband Services are similar.

7. To edit or delete an existing service request, check the box next to the service request line item then select **Edit Service Request** or **Remove Service Request**.

8. If all service requests are complete, select **Save & Continue**.

**Technical Contact Information**
1. Select **Yes** if there is a technical contact person who can provide additional information for your FCC Form 470 and the services or products that you are seeking. Otherwise, select **No** and then select **Save & Continue**.

2. If you select **Yes**, the screen will refresh, and you can enter contact details one of two ways:
   a) **Search EPC System** – Locate the technical contact person by typing in the person’s name.
   b) **Enter Details Manually** – Complete the required fields. NOTE: This will NOT create a new user in EPC.

3. After you select or enter the technical contact person, select **Save & Continue** to proceed to the next page.
Procurement Information

1. If there are state or local requirements that service providers must adhere to when bidding on your services, select **Yes**. If there are none, select **No**.

2. If you select **Yes**, the page will refresh with a text box, and you can provide a description of the requirements. You may also use the text box to explain any other restrictions on bidding procedures.

<table>
<thead>
<tr>
<th>State or Local Procurement Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are there state or local procurement/competitive bidding requirements that apply to the procurement of services sought?</td>
</tr>
<tr>
<td>[ ] Yes</td>
</tr>
<tr>
<td>If applicable, provide a description of state or local procurement rules and/or restrictions on how or when service providers may contact you or an other bidding procedures.</td>
</tr>
<tr>
<td>All vendors must be in compliance with the Virginia Public Procurement Act.</td>
</tr>
</tbody>
</table>

3. To proceed, select one of two options:
   a) **Review FCC Form 470** – Proceed to the next page to review and certify (See Review FCC Form 470).

   b) **Save & Share** – Send the completed form to another partial or full-rights user in your organization to review, edit or complete the form. When the system prompts you with a confirmation message, select **Yes** to proceed with sharing or **No** to cancel sharing.

**NOTE:** If you choose this option, the form will disappear from your Tasks list. You will not be able re-enter the form unless the form is saved and shared back to you.
FCC Form 470 Review

1. When you select **Review FCC Form 470**, the system generates a PDF version of the form and sends a task to your **Tasks** list. Wait one minute on this screen while the system generates the form.

2. After one minute, go to your **Tasks** and select **Review FCC Form 470**.

FCC Form 470 Draft

1. Select the Download Document Link to download the PDF version of the FCC Form 470 to your computer.

2. Open the PDF, review the content, and verify that the data is correct and consistent with what you entered on the form.
3. To make changes to your form, select **Back**.
4. If the PDF is accurate, proceed with form certification according to your permission level:
Partial-Rights Users

1. Select **Send for Certification**, as you don’t have permissions to certify the form.

2. When the system notifies you that your form will be sent to the full-rights users in your organization, select **Yes** to proceed.

Full-Rights Users

1. Select the checkbox to certify that the information in the PDF version of the FCC Form 470 is correct.

You have two options:

2. Select **Send for Certification** to send the form to other full-rights users in your organization. **NOTE:** If you choose this option, the form will disappear from your **Tasks** list. You will not be able to re-enter the form. After the system notifies you that your form will be sent to the full-rights users in your organization, select **Yes** to proceed; or

3. Select **Continue to Certification** to certify the form yourself. When the system notifies you that your form will be sent directly to certification, select **Yes**.
Full-Rights Users Certifying FCC Form 470 from Partial-Rights or from Other Full-Rights User

See [Full-Rights User Certifying FCC Form 470 from Partial-Rights User](#) below.

Certifications and Signature

Certify FCC Form 470

1. When the **Certify FCC Form 470** page appears, carefully read the certification text.
2. Select each checkbox to confirm compliance and certification.

   - After all boxes are checked, select **Certify**. This action is equivalent to providing your electronic signature.
   - Read the message regarding the certification and select **Yes** if you agree.
When you select **Yes** on the confirmation message, the form will be certified and will be posted on the USAC website. The form task will disappear from your **Tasks** list.

**Full-Rights User Certifying FCC Form 470 from Partial-Rights User**

A full-rights user receives a task to certify an FCC Form 470 when the form is submitted by a partial-rights user or another full-rights user and sent for certification.

1. **On the Tasks page**, select the task.
2. **When prompted**, accept the task.
3. **Select the Download Document Link** to download the PDF version of the FCC Form 470 to your computer.
4. Open the PDF, review the content, and verify that the data is correct and consistent with what was entered on the form.
5. To make any necessary corrections, return to EPC and select Edit to return to the form’s Basic Information section.

Continue through each form section and make any necessary changes.
6. Generate a new PDF and review again. Once the PDF is correct, click the checkbox to indicate that the information is accurate and then select Continue to Certification.

7. When the Certify FCC Form 470 page appears, carefully read the certification text.
8. Select each checkbox to confirm compliance and certification.
9. After all boxes are checked, select **Certify**. This action is equivalent to providing your electronic signature.

10. Read the message regarding the certification and select **Yes** if you agree.

When you select **Yes** on the confirmation message, the form will be certified and will be posted on the USAC website. The form task will disappear from your **Tasks** list.

After **FCC Form 470 Certification**

Certified FCC Forms 470 are posted to USAC’s EPC portal and on USAC’s open source data platform. You can also view the forms, their attachments, and summary information from the tools in the **FCC Form 470 Tools** section of the **Tools** page on USAC’s website. You can view information from the basic information section of each FCC Form 470 in the **E-rate Open Competitive Bidding: Basic Information (FCC Form 470 and Related Information)** dataset on the open source data platform.
FCC Form 470 Receipt Notification

When the form is received by USAC, a notification appears in the News feed for all members of your organization. This notification confirms that the form has been certified, provides the Allowable Vendor Selection/Contract Date for your form, and explains next steps (including how to submit modifications).

It is important that you review this form now to make sure the products and services you require have been correctly posted and, if necessary, take any appropriate corrective action as soon as possible. You are allowed to correct certain errors on your form but not others. For fields that allow a correction, you will be able to edit the information in the form field directly.

To determine what corrections are allowable and why, see the “List of correctable ministerial and clerical errors” on our website.

NEXT STEPS
- Make sure that you wait 28 days before you select your service provider(s) and sign any contracts.
- Use the Form 470 Application Number shown above in any Form 471. Block 5 Funding Request that cites this Form 470. Share this number with those schools and/or libraries who may wish to cite this Form 470 in their Form(s) 471.
- Follow all applicable state and local procurement laws and be prepared to demonstrate compliance with these laws.
- Watch our website for information about the Form 471 filing window. You can view your entire Form 470 by clicking the link below.

 FY2019 FCC Form 470 - ABC School Dist.
1 minute ago Comment Hide Info
Application Number 190000030
Entity Number 208
Allowable Contract Date Jul 20, 2018
Search and Export Results
To export form search results, select the **Search and Export Certified FCC Form 470** link on the **Actions** tab.
FCC Form 470 Modifications

Allowable Modifications

A certified FCC Form 470 can be modified by applicants and consultants who have either partial or full-rights permissions. Sometimes modifications require a full-rights user’s approval of modifications made by a partial-rights user. Additional information about which modifications are allowable and when a new form must be filed can be found on the Ministerial & Clerical Errors webpage.

- **Edit Application Nickname** – No approval by full-rights user needed.
- **Add an RFP Document** – No approval by full-rights user needed. This edit is only allowed for FCC Forms 470 that were certified with at least one associated RFP document.
- **Change Main Contact Person** – Full-rights user approval needed. USAC must also approve this modification.
- **Edit Technical Contact** – Full-rights user approval needed. USAC must also approve this modification.

Submitting Modifications

1. Log in to [EPC](https://www.ercot.com).
2. Locate the form you want to edit from either My Landing Page or the Records tab.
   
   (a) From My Landing Page, scroll to FCC Forms and Post-Commitment Requests and search for Certified forms.

   (b) On the Records tab, select FCC Forms 470.
3. Filter the forms by two fields:
   a) **Filed by my Organization** – Select Yes.
   b) **Status** – Select Certified.
   c) You can also filter further by funding year and service type

   The system lists the certified forms that are filed by your organization.

4. Locate and select the FCC Form 470 number of the form you want to modify.
5. Select **Related Actions**.

6. On the **Related Actions** page, review the list of available actions for the certified FCC Form 470.

**Edit the Application Nickname on a Certified FCC Form 470**

1. On the **Related Actions** page, select **Edit Application Nickname**.
2. Enter the new **Application Nickname**.

3. Select **Submit**. The nickname for the FCC Form 470 is changed.
Add an RFP Document to a Certified FCC Form 470

If the FCC Form 470 has an associated RFP document, you can add more documents using the **Add an RFP Document** function.

1. On the Related Actions page, select **Add an RFP Document**.

2. When the list of associated RFP documents opens, select **UPLOAD** or drag the document onto **Drop file here**.
3. Select each checkbox for a related service to link the new RFP to a service request. You can link the RFP to all Category One or Category Two services by checking the box to the left of the **Type** column header under the **Category 1** or **Category 2** section.

4. Select **Submit**.

5. When the confirmation pop-up message appears, note that you cannot make a cardinal change to the scope of the services after your form is certified.

6. If you agree with the statement, select **Yes** to proceed.

The new RFP document will be added to the FCC Form 470.

**Change the Main Contact Person on a Certified FCC Form 470**

1. On the **Related Actions** page, select **Change Main Contact Person**.
2. Begin entering the new contact’s name or email address. The system searches for matches.
3. When you select a name, **Contact Details** appear.

4. Select **Submit** to update the main contact. If you are a partial-rights user, the modification is first sent to the organization’s full-rights users for approval. After a full-rights user’s approval, USAC must also approve the modification.

5. After the modification is approved, you will receive a **News** notification stating that the main contact person has been changed on your FCC Form 470.
Edit the Technical Contact on a Certified FCC Form 470


2. Revise the information entered in one or more fields.

3. Select Submit. If you are a partial-rights user, the modification is first sent to the organization’s full-rights users for approval. After a full-rights user’s approval, USAC must also approve the modification.

4. When the modification is approved, you will receive a News notification stating that the technical contact has been changed on your FCC Form 470.