E-Rate Training Agenda 9/9/2025

Topic	Presenter	Time*	Details
Introduction	Catherine Willis	9:00-9:05	Welcome and house-keeping items
Program Overview and FY2025 Program Updates	Catherine Willis and Allison Kahan	9:05-9:30	E-Rate program summary and updates for the new Category Two (C2) budget cycle, and reminders concerning the SPAC and transitioning services.
Eligible Services	Bernie Manns	9:30-10:25	Eligible services list review, types of eligible service, BMIC details, advance installation and basic fiber concepts.
Break		10:25-10:35	
Competitive Bidding (FCC Form 470)	Shawn Jensen	10:35-11:20	CB and FCC Form 470 overview, SP role, contracts, RFPs, Vendor communications, requirements for leased dark fiber and self-provisioned networks, evaluation matrix, CB exemptions.
FCC Form 471	Bernie Manns	11:20-12:00	FCC Form 471 application overview and requesting funding, application review process, and funding commitments.
Lunch		12:00-1:25	
Improving E-Rate	E-Rate Staff	1:25-2:10	A listening session for attendees to share what's going well, how E-Rate can improve program administration, and answer your questions.
AAD	Rashonda Ward	2:10-2:50	Audit overview, what happens during an audit, what will be asked of the program participant, general timeline.
Break		2:50-3:00	
Invoicing	Pam Lloyd	3:00-3:55	Invoicing overview, preparing to Invoice, filing an FCC Form 498, filing an invoice, invoice reviews, record retention and Open Data, and key takeaways.
Closing Remarks	Catherine Willis	3:55-4:00	Thank you for joining us!

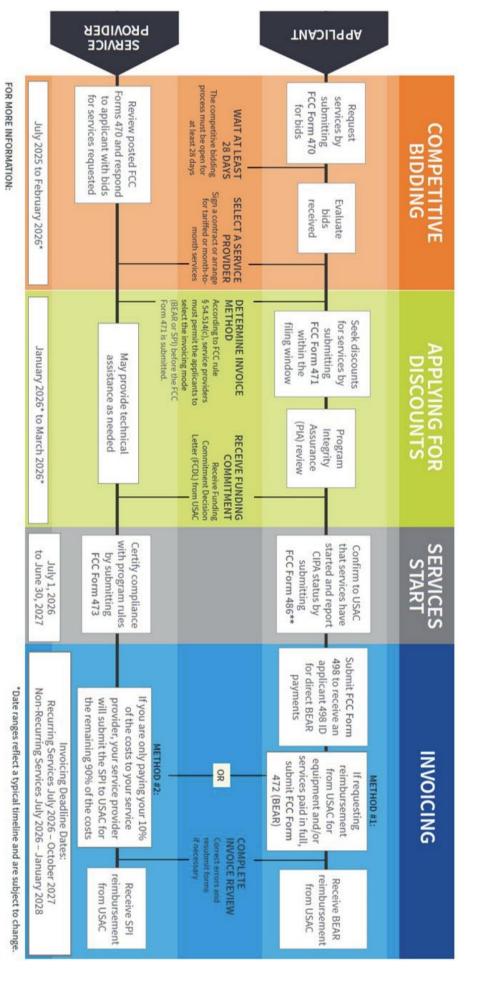*Times may fluctuate due to question-and-answer sessions

Lunch/Coffee Spots

Training Materials

![Universal Service Administrative Co.]

E-Rate Process Graphic

COMPETITIVE BIDDING

APPLICANT

Request services by submitting FCC Form 470 for bids

Evaluate bids received

WAIT AT LEAST 28 DAYS
The competitive bidding process must be open for at least 28 days

SELECT A SERVICE PROVIDER
Sign a contract or arrange for tariffed or month-to-month services

SERVICE PROVIDER

Review posted FCC Forms 470 and respond to applicant with bids for services requested

July 2025 to February 2026*

APPLYING FOR DISCOUNTS

Seek discounts for services by submitting FCC Form 471 within the filing window

Program Integrity Assurance (PIA) review

DETERMINE INVOICE METHOD
According to FCC rule § 54.514(c), service providers must permit the applicants to select the invoicing mode (BEAR or SPI) before the FCC Form 471 is submitted.

RECEIVE FUNDING COMMITMENT
Receive Funding Commitment Decision Letter (FCDL) from USAC

May provide technical assistance as needed

January 2026* to March 2026*

SERVICES START

Confirm to USAC that services have started and report CIPA status by submitting FCC Form 486**

Certify compliance with program rules by submitting FCC Form 473

July 1, 2026 to June 30, 2027

INVOICING

METHOD #1:
If requesting reimbursement from USAC for equipment and/or services paid in full, submit FCC Form 472 (BEAR)

Receive BEAR reimbursement from USAC

Submit FCC Form 498 to receive an applicant 498 ID for direct BEAR payments

OR

METHOD #2:
If you are only paying your 10% of the costs to your service provider, your service provider will submit the SPI to USAC for the remaining 90% of the costs

COMPLETE INVOICE REVIEW
Correct errors and resubmit forms if necessary

Receive SPI reimbursement from USAC

Invoicing Deadline Dates:
Recurring Services July 2026 – October 2027
Non-Recurring Services July 2026 – January 2028

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

FOR MORE INFORMATION:

- **Website:** The application process is broken down in detail for both applicants and service providers on the Schools and Libraries Program website (www.usac.org/sl).
- **Glossary of Terms:** Definitions for program terms and acronyms.
- **Consortium members report their CIPA status by submitting the FCC Form 479 to their consortium leader. The consortium leader then files the FCC Form 486.
- To adjust funding commitments and/or modify the dates for receipt of services after the FCDL is issued, file the FCC Form 500.