



E-Rate Program Overview

Applicant and Service Provider Training
September 18, 2025

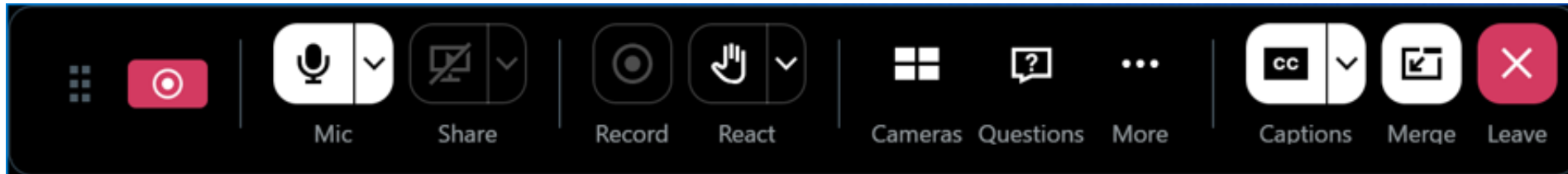
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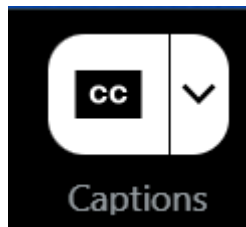
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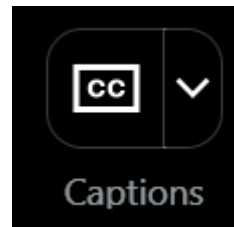
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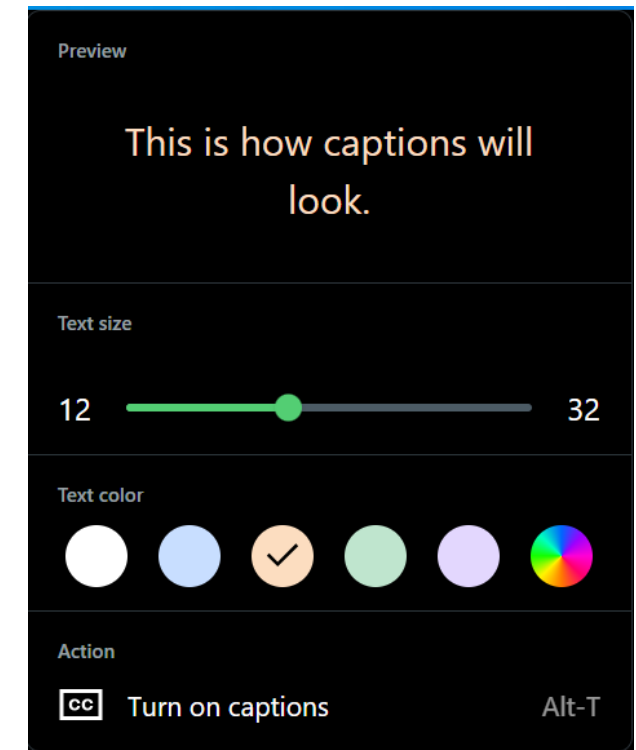
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Captions ON



Captions OFF



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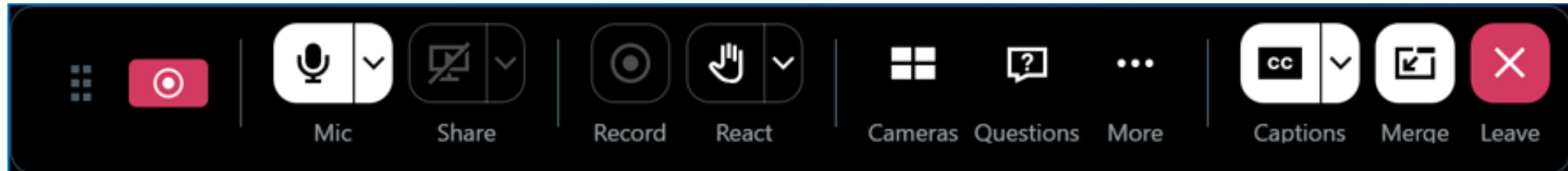
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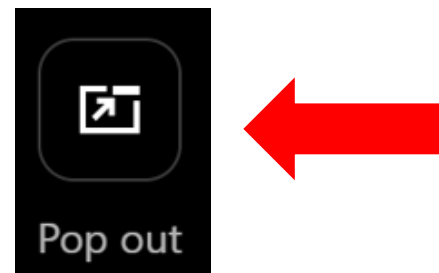
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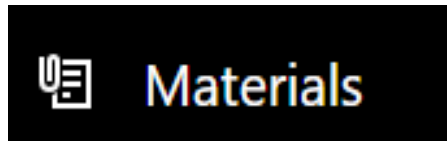


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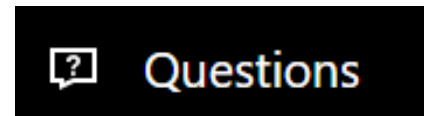


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Questions

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No questions yet

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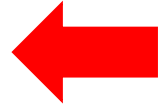
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E-Rate Fall Training Series 2025

✓ E-Rate Program Overview - September 18



- ☐ Pre-Commitment - September 25
- ☐ Category Two Budgets - October 16
- ☐ EPC Admin Window - October 21
- ☐ Post-Commitment - October 23
- ☐ Invoicing - October 30
- ☐ Eligible Services - November 6

The screenshot shows the E-Rate Webinars page. The navigation bar includes links for About, E-Rate (selected), Rural Health Care, Lifeline, High Cost, and Service Providers. Below the navigation bar, there's a breadcrumb trail: USAC | E-Rate | Learn | Webinars. The main content area is titled 'Webinars' and includes a description: 'Join us to learn about E-Rate program updates, including E-Rate program rules and orders, guidance about compliance and filings, stakeholder support, and more. During each webinar, the audience will have the opportunity to take part in a live question and answer session with members of the E-Rate program team who will answer questions on the webinar topic.' There is a 'Sign up' link with an external icon for the E-Rate News Brief to receive webinar announcements via email. On the left sidebar, there are links for Learn, Videos, Webinars (highlighted), E-Rate News Brief, In-Person E-Rate Training Events, EPC Training Site, and FAQs.

- The E-Rate Fall Training Webinar Series is suitable for all E-Rate experience levels.
- Webinars are recommended for both applicants and service providers.
- Please visit the E-Rate [Webinars](#) page for additional information including course descriptions, registration links for future webinars, and access to recordings and handouts from previous webinars.

Meet Our Team



Cedric Watkins

Program Analyst | E-Rate



Lisette Manns

Associate Manager | E-Rate

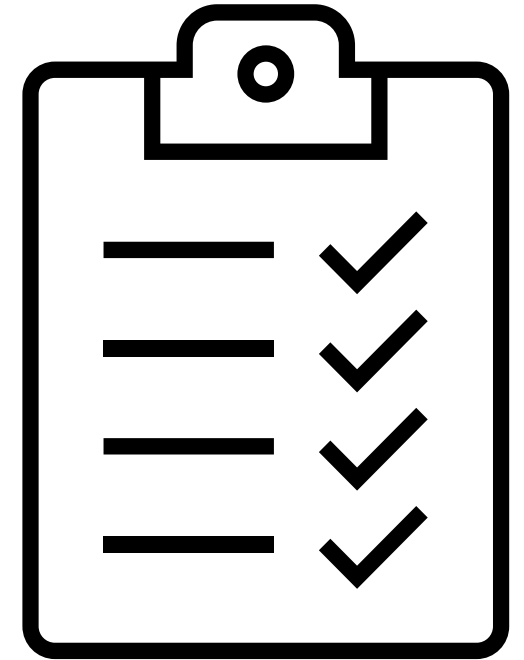


Shawn Jensen

Associate Manager | E-Rate

Agenda

- USAC Overview
- E-Rate Program Overview
- FY 2026 Program Updates & Reminders
- Entity Eligibility
- Eligible Services Overview
- E-Rate Application Process Overview



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.



High Cost Program

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



E-Rate Program

Funding for broadband services in eligible schools and libraries.

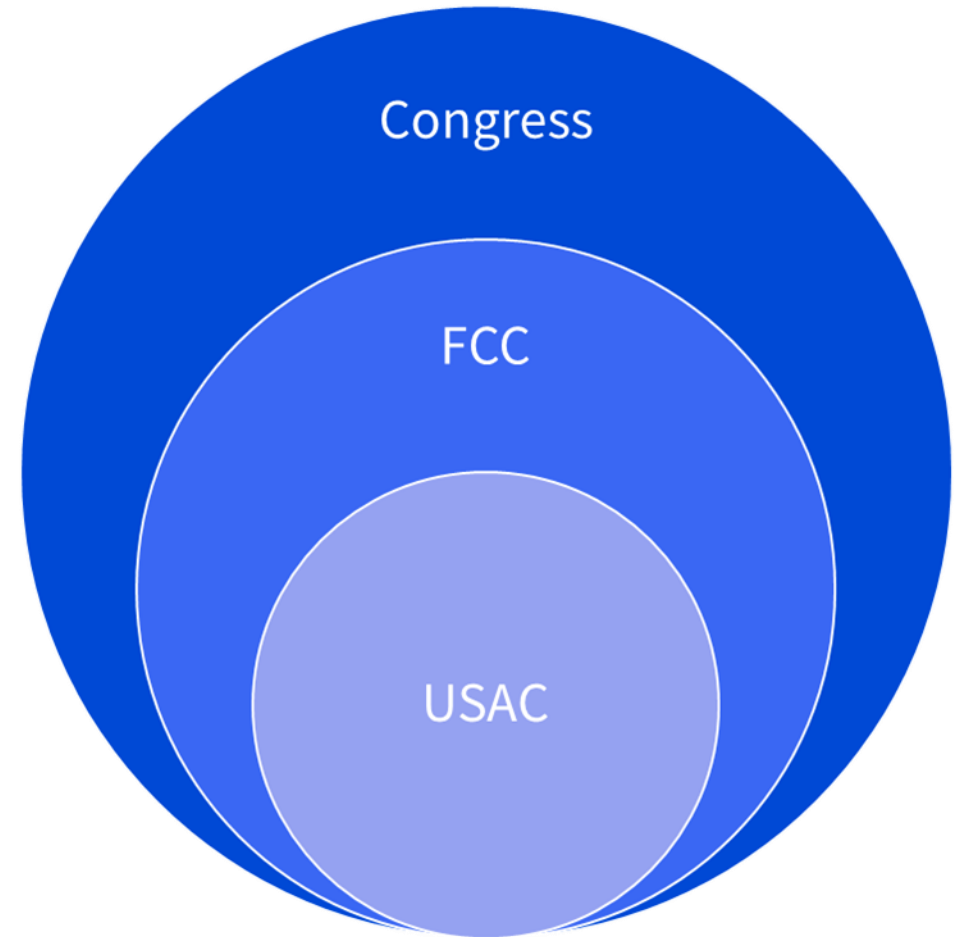


Rural Health Care Program

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

Who Makes The Rules?

- Congress enacted the Telecommunications Act of 1996, which directed the 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 USAC.
- USAC is responsible for the day-to-day administration of the E-Rate program.



What is E-Rate?

- The E-Rate program provides support to schools and libraries across the nation to obtain affordable, high-speed broadband services and internal connections to connect students and library patrons with learning opportunities and services.



How is This Accomplished Through E-Rate?

- The E-Rate Program provides **discounts of up to 90 percent** to eligible schools (K-12), libraries, and groups of schools and libraries (e.g., consortia, districts, systems) for eligible internet access, data transmission services, and internal connections (e.g., Wi-Fi equipment, cabling, and basic maintenance services) that are competitively bid and approved on the application (FCC Form 471).
- These discounts result in a reduction in the costs of the equipment and services to the schools or libraries requesting funding through the E-Rate program.
- For example: A library with a 90 percent discount rate purchasing \$1,000 in eligible broadband services would pay its 10 percent non-discount share of costs (i.e., \$100) to the service provider. The **E-Rate program would pay the remaining 90 percent (i.e., \$900)** to the service provider.

E-Rate Program Overview

Provides funding to help schools and libraries obtain affordable telecommunications and internet access.

FY2025
Program Cap **\$5.06B**

Eligible Applicants

Public and private schools (K-12), libraries, and groups of schools and libraries (e.g. consortia, school districts, library systems), as well as Tribal schools, libraries, and Tribal college and university (TCU) libraries that also serve as a public library

Eligible Services

Schools and libraries are eligible for discounts between 20% and 90% of the costs of eligible equipment and services. The applicant pays the remaining share (e.g., a 90% applicant pays \$100 on a \$1,000 request). *Discount varies based on the school or library’s level of poverty, urban/rural status, and the type of service.

Category 1

Services that support connectivity to schools and libraries. For example, data transmission and Internet access service, including special construction services for network builds.

Category 2

Services that support connectivity within schools and libraries. This includes internal connections (e.g., routers, cabling, or other equipment needed for a Wi-Fi network); managed internal broadband services (MIBS), and basic maintenance of internal connections (BMIC).

Top C1 Purchases:

- Leased lit fiber
- Internet access provided over fiber or copper
- Commercially available internet access
- Cable provider internet
- Satellite internet

Top C2 Purchases:

- Internal Connections (IC): Cabling, routers, switches, modems, wireless access points, right to use licenses
- Basic Maintenance of Internal Connections: Repair and upkeep of eligible IC
- Managed Internal Broadband Services: Managed Wi-Fi agreements

Funding Year 2026 Program Updates & Reminders

FY2026– 2030 Category Two (C2) Budget Management

FY2026 will be the first year of the FY2026-2030 funding cycle.

- Unused funds from the FY2021 – 2025 Category Two (C2) budget will not roll over to the FY2026 – 2030 funding cycle.
- The E-Rate C2 Budget Tool FY2021+ provides data on the FY2021-FY2025 C2 budget cycle. It is available on the Tools page along with a video on how to use the tool and a glossary of terms.
 - The tool will be updated to show C2 budget forecast data for the FY2026-FY2030 C2 budget cycle.
- 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- 2030 cycle.

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**
- **\$30,175.00 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.

Establishing Your C2 Budget for this Cycle

- Update your entity profile in EPC during the Administrative Window
 - This information determines your discount
 - For instructions, please see the [Admin Window eLM](#).
- **Forecast Budget:** Beginning in the FY2026-2030 budget cycle, all entities will have a Forecast budget status based on the information in their EPC profile. This means that any updates you make to the entity profile will automatically reflect in an updated budget amount, without the need to request a replacement budget.

News Tasks (91,946) Records Reports Actions

Records / Applicant Entities
#126423 - FAIRFAX COUNTY PUBLIC SCHOOLS

Summary Customer Service Modifications Additional Information Discount Rate **Category Two Budget** Contracts FCC Forms FRN Appeals News Related Actions

Category Two Budget Status

Category Two Budget information presented below reflects data starting in FY2016.

▼ 2026-2030

▼ 2026-2030 (Budgeted Entity)

► Show column definitions

Budget Status	Budget	Total In-Review Requested Costs	Total Committed Costs	Total In-Review Requested and Committed Costs	Remaining Budget
Forecast	\$31,284,611.00	-	-	-	\$31,284,611.00

Your student count has changed relative to the count used to establish your existing C2 budget. To request a replacement C2 budget in 2025, click [Request Replacement C2 Budget](#).

Category Two Budget Details

Funding Year	Budget Status	Budget	Funding Year In-Review Requested Costs	Total In-Review Requested Costs	Funding Year Committed Costs	Total Committed Costs	Total In-Review Requested and Committed Costs	Remaining Budget
2026	Forecast	\$31,284,611.00	-	-	-	-	-	\$31,284,611.00
2027	-	-	-	-	-	-	-	-
2028	-	-	-	-	-	-	-	-
2029	-	-	-	-	-	-	-	-
2030	-	-	-	-	-	-	-	-

5 items

SHOW ALLOCATION BREAKDOWN

► 2021 - 2025

Your district's schools manage the Category Two Budget information for the FY2015 to FY2020 budget cycle. Please visit the associated school profiles for more details.

Establishing Your C2 Budget for this Cycle (cont.)

- **Preliminary Budget:** The entity has **certified** a Form 471 application within the FY2026-2030 C2 budget cycle. This means that the entity has certified the accuracy of the budget data currently in the entity profile.
- **Confirmed Budget:** Program Integrity Assurance (PIA) review of FY2026-2030 C2 Form 471 application is **complete**. The C2 budget in the entity profile is now **fixed**. It can only be changed via an Appeal for the current FY. Beginning in FY2027, the entity can request a replacement C2 budget if the student count has increased for the next year.

FCC Form 473 Service Provider Annual Certification (SPAC) Form

- Service providers are required to file a SPAC Form to certify their compliance with E-Rate program rules.
- FCC rules require service providers to annually submit a SPAC Form for each [Service Provider Identification Number](#) (SPIN) for **every funding year** that they participate in the E-Rate program. See 47 C.F.R. § 54.504(f).
- **TIMING:** Service providers must file their SPAC Form before any [FCC Forms 472](#) (BEAR) or [FCC Forms 474](#) (SPI) invoices can be processed and paid by USAC.
- Service providers can file a SPAC Form in EPC after the FCC Form 471 application filing window opens for the upcoming funding year and should do so before the end of the applicable funding year (i.e., June 30th). Applicants should contact their service provider if the form has not been filed by the end of the funding year (i.e., June 30). Service providers who fail to file the SPAC form and prevent an applicant from timely filing their BEAR forms may be referred to the FCC EB for further action (see [DA-25-394](#)).
- If an applicant's service provider went out of business, you may be eligible for relief under order (see [DA-25-394](#)), please contact USAC's Customer Service Center (CSC) for assistance.
- To view the status of the SPAC for any given funding year, please use the [E-Rate FRN Status Tool 2016+](#) in Open Data.



Entity Eligibility

Eligible Service List

C1 and C2 Services

Types of Eligible Services

What Entities Are Eligible?

The Eligible Services List (ESL)

- Each year, before the opening of the [FCC Form 471 filing](#) window, the FCC releases a list containing general guidance on the equipment and services that are E-Rate eligible for the upcoming funding year.
- The ESL also provides helpful information such as **eligibility conditions** for each [category of service](#) for the funding year.
- Applicants can only receive funding for eligible equipment and services that are being used for [educational purposes](#).



Eligible Services List (ESL)

- The Eligible Services List will be posted on E-Rate's [Eligible Services List](#) webpage when it is released.
- The ESL Order has five sections, with the actual Eligible Service List posted last.
 - Introduction – A preface to the contents of the Order.
 - Background – Discusses the FCC's seeking of comments, and related actions, prior to issuing the Order.
 - Discussion – Detailed discussion of scope of modifications in the Eligible Services List.
 - Appendix A – List of Commenters.
 - Appendix B – FY2026 Eligible Service List.

Categories of Service

- Category 1 Services are services needed to support broadband connectivity **to** eligible schools and/or libraries.
- Category 2 Services are:
 - Services needed for broadband connectivity **within** schools and/or libraries.

Note: Equipment and services may be fully or only partially eligible for E-Rate Support.

Categories of Service

- **Category One (C1)**
 - Data Transmission and/or Internet Access
 - Visit the [Eligible Services List](#) on our website
- **Category Two (C2)**
 - Internal Connections, Managed Internal Broadband Services, and Basic Maintenance of Internal Connections
 - Applicant has a budget or limit on how much funding can be requested
 - Budget covers a five-year period (FY2026-2030)
 - See [Category Two Budgets](#) page

Category One Services – Service to the Entity Examples

- Leased lit fiber or leased dark fiber
- Internet access
- Satellite service
- DS-1 (T-1), DS-3 (T-3), etc.
- DSL
- Broadband over power lines

Category One Services – Service to the Entity – Eligible Costs

- Eligible costs associated with Category One services:
 - Monthly charges
 - Special construction
 - Installation and activation charges
 - Software
 - Modulating electronics/equipment necessary to make an eligible Category One broadband service functional
 - Maintenance and operations charges, including costs of for software needed for the operation of or maintenance of network equipment
 - The FY2025 Eligible Services List clarified that the software necessary to operate or maintain Category One equipment is eligible.

Types of Category Two Service

- **Internal Connections (IC)** – The equipment and services used to bring broadband into, and provide it throughout, schools and libraries.
- **Basic Maintenance of Internal Connections (BMIC)** – Basic maintenance and technical support appropriate to maintain reliable operation for eligible broadband internal connections.
- **Managed Internal Broadband Services (MIBS)** – Third-party operation, management, and monitoring of eligible broadband internal connections (owned or leased equipment).

Category 2 services have a **five-year budget** based on student count (schools) or square footage (libraries).

The type of Category 2 service you select must be consistent between your FCC Form 470 and FCC Form 471.

Category Two Service Type Examples

- Internal Connections
 - Cabling, routers, switches, and modems
 - Right-to-use software or Client Access Licenses
- Basic Maintenance of Internal Connections (BMIC)
 - The repair and upkeep of eligible cabling, routers, switches and modems
 - Multi-year maintenance service subscriptions
 - Note: Only maintenance services **provided in the applicable funding year** are eligible in that year (i.e., one year of a 3-year subscription should be requested on a current year funding request and invoiced a year at a time over the 3-year period).
- Managed Internal Broadband Services (MIBS)
 - Managed Wi-Fi agreement

What Entities are Eligible?

- **Schools** – Elementary and secondary schools as defined by the Elementary and Secondary Education Act.
 - For-profit schools are not eligible.
 - Schools with endowments of \$50 million or greater are not eligible.
 - Educational Service Agencies are eligible in some states and territories.
- **Libraries (includes Tribal Libraries and Tribal College and University Libraries)**
- **Non-Instructional Facilities**
- **Consortia of Eligible Entities – (a consortium of eligible schools and/or libraries)**
 - A Tribal government can create a consortium and include its Tribally-controlled schools and libraries as consortium members, and a Tribal government employee can act as the contact person for the consortium leader.

Library Eligibility

- A library must be eligible for assistance from State Library administrative agency under the Library Services Technology Act (LSTA), as amended by the Museum and Library Services Act of 2018.
- A library may be designated as a Tribal library by a Tribal Council (e.g., pursuant to a Tribal Resolution) and becomes eligible for USF support as long as the following three characteristics are true:
 - Regularly scheduled hours,
 - Staff, and
 - Materials available for library users.
- The library's budget must be completely separate from that of any school.
 - Please note, however, that **Tribal Colleges and University (TCU)** libraries can apply for E-Rate support when they are also serving as a public library in their community by having dedicated library staff, regular hours, and a collection available for public use. E-Rate support is restricted to TCU library use only (see FCC 23-56 issued on July 21, 2023).
 - Equipment and services supporting the TCU library's needs are eligible for E-Rate support. Only in instances where broadband support is requested for a portion of the network serving the Tribal College or University will cost allocation be required.
 - Broader connectivity requirements of the higher education institution are not eligible for E-Rate funding.
- Cannot operate as a for-profit business.

E-Rate Tribal Entity

- The definition was updated for FY24 in the FCC 23-56 and the Federal Register:
 - An entity is “Tribal” for purposes of E-Rate funding if it is a **school operated by or receiving funding** from the Bureau of Indian Education (BIE), *or*
 - If it is a **school or library operated by** any Tribe, Band, Nation, or other organized group or community, including any Alaska native village, regional corporation, or village corporation (as defined in, or established pursuant to, the Alaska Native Claims Settlement Act (43 U.S.C. 1601 et seq.)) that is recognized as eligible for the special programs and services provided by the United States to Indians because of their status as Indians.
- Check the tribal box in your entity’s profile in the E-Rate System (EPC) during the **administrative window** (typically **October – January**). Starting this year, you will also be asked to provide your Tribal affiliation. Designation provides Tribal Libraries with:
 - Access to higher discount rates for Tribal libraries at the 85% discount rate for Category Two (C2) (services and equipment within the library).
 - Access to a higher C2 funding floor for Tribal libraries.

Non-Instructional Facility 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 only).
 - **Examples of NIFs on library property** include, but are not limited to:
 - Bookmobile garages;
 - Interlibrary loan facilities; and
 - Library technology centers.
 - **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.
- In FY24, **Category Two** services are allowed for NIFs when they are for essential shared equipment located at a NIF and eligible E-Rate purposes as long as the most cost-effective solution is chosen. The NIF's usage of the shared equipment will no longer be required to be cost-allocated in these instances.
- More information is available on the [Non-Instructional Facility](#) page.

Consortium Eligibility

- A consortium (plural consortia or consortiums) is a **group of E-Rate eligible entities** that seek competitive bids or E-Rate funding for eligible equipment and services on behalf of its members. Consortia are not themselves eligible for discounted services, but they can conduct competitive bidding processes and/or apply for eligible equipment and services on behalf of their members.
- Schools and libraries can come 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 come together and work with the consortium leader to conduct the competitive bidding and application processes on their behalf.
- The [consortium leader](#) is responsible for ensuring that necessary certifications are made, responding to USAC inquiries on behalf of members, and maintaining records.

Understanding Entity Types

- 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.



E-Rate Application Process Overview

- Before You Begin
- Application Cycle Overview
- Step-by-Step Application Overview

Before You Begin

Before You Begin: New Schools and Libraries

Follow the steps below to prepare your E-Rate program application:

1. Obtain an [FCC Registration Number](#).
2. Obtain a [Billed Entity Number \(BEN\)](#) and create a user profile in the [E-Rate Productivity Center \(EPC\)](#).
3. Designate your entity's Tribal status by [checking the Tribal box](#).
4. Solicit bids for eligible services and equipment by completing an [FCC Form 470](#) and wait at least [28 days](#) before selecting your service provider(s). If your purchase meets the requirements under [Commercially Available Business Internet Access](#) or the Library Category Two \$3,600 exception in the E-Rate rules, proceed to start services without completing this step.
5. Create your Contract Record and file your [FCC Form 471](#) funding application to request E-Rate support.

Special Information for Tribal Governments

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 as an entity is not eligible for discounted services, but they can run competitive bidding processes and/or apply for discounted services on behalf of their eligible member entities. Any schools or libraries can come together to form a consortium.

Before You Begin: 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.

- **First-time Filers**
 - If you are new to the E-Rate program, you will need a user account in the E-Rate Productivity Center (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.

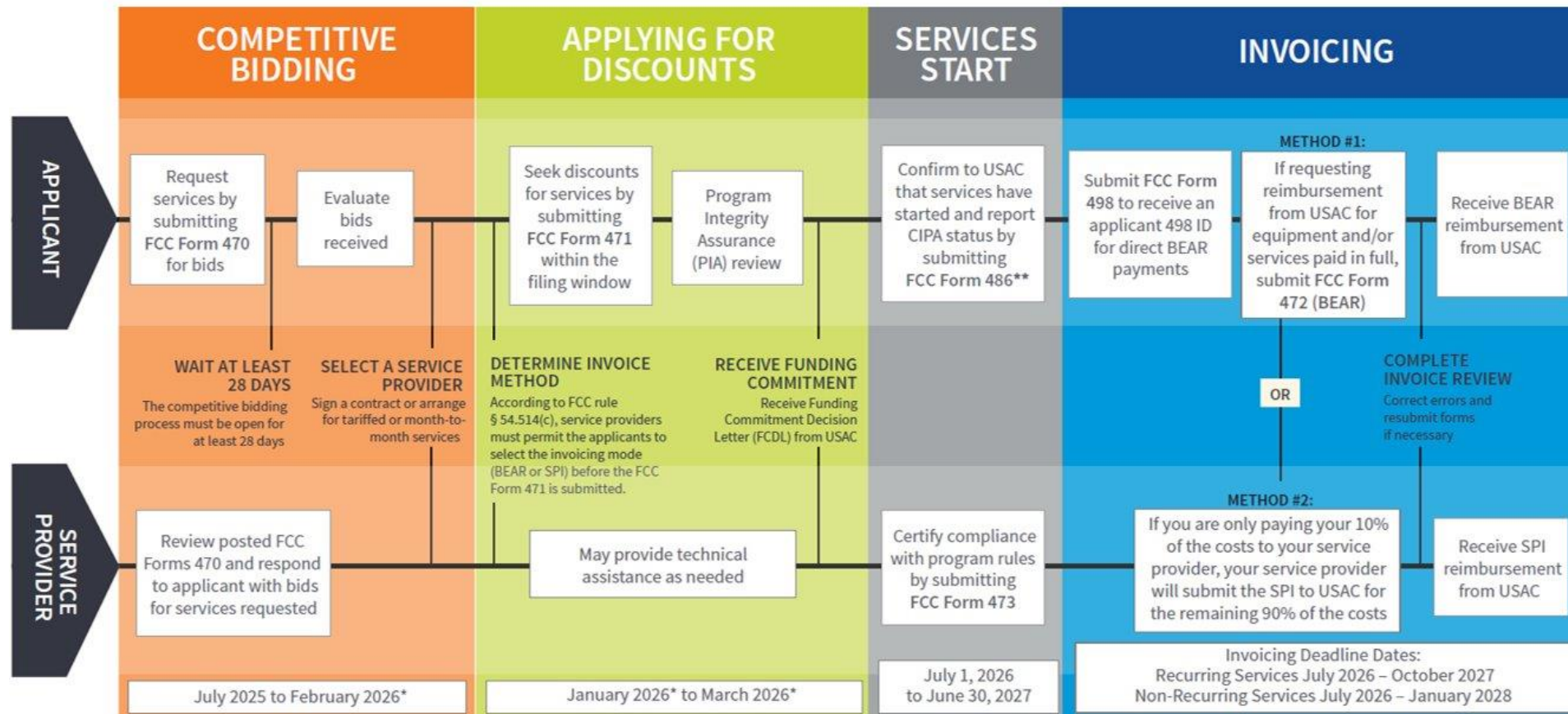
The administrative window closes – and the applicant profiles are locked – shortly before the FCC Form 471 application filing window opens in January. The administrative window will open in October and will close in January.

The Account Administrator

- Every parent organization (independent school, independent library, school district, library system, consortium, service provide and consultant) in EPC needs an **account administrator**.
- **Account Administrators:**
 - Create new users
 - Modify the rights of existing users (user permissions)
 - Modify information about their organization
 - Link or unlink their organization to consulting firms and consortia
 - Modify (change) the account administrator
 - Add or confirm Tribal status

Application Cycle Overview

The E-Rate Application Process: FY2026



FOR MORE INFORMATION:

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

- 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.

Applicant Forms and Important Dates Reminder

Competitive Bidding ➡ Apply for Discounts ➡ Start Services ➡ Invoice USAC

FY2024:
July 2023 - February 28, 2024

FY2025:
July 2024 - February 26, 2025

FY2026:
July 2025 - February 2026*

FY2024:
January 17, 2024 - March 27, 2024

FY2025:
January 15, 2025 - March 26, 2025

FY2026:
January 2026 - March 2026*

FY2024:
July 1, 2024 - June 30, 2025

FY2025:
July 1, 2025 - June 30, 2026

FY2026:
July 1, 2026 - June 30, 2027

Recurring Services
FY2024: July 2024 – October 2025
FY2025: July 2025 – October 2026
FY2026: July 2026 – October 2027

Non-recurring Services
FY2024: July 2024 – January 2026
FY2025: July 2025 – January 2027
FY2026: July 2026 – January 2028

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471

486

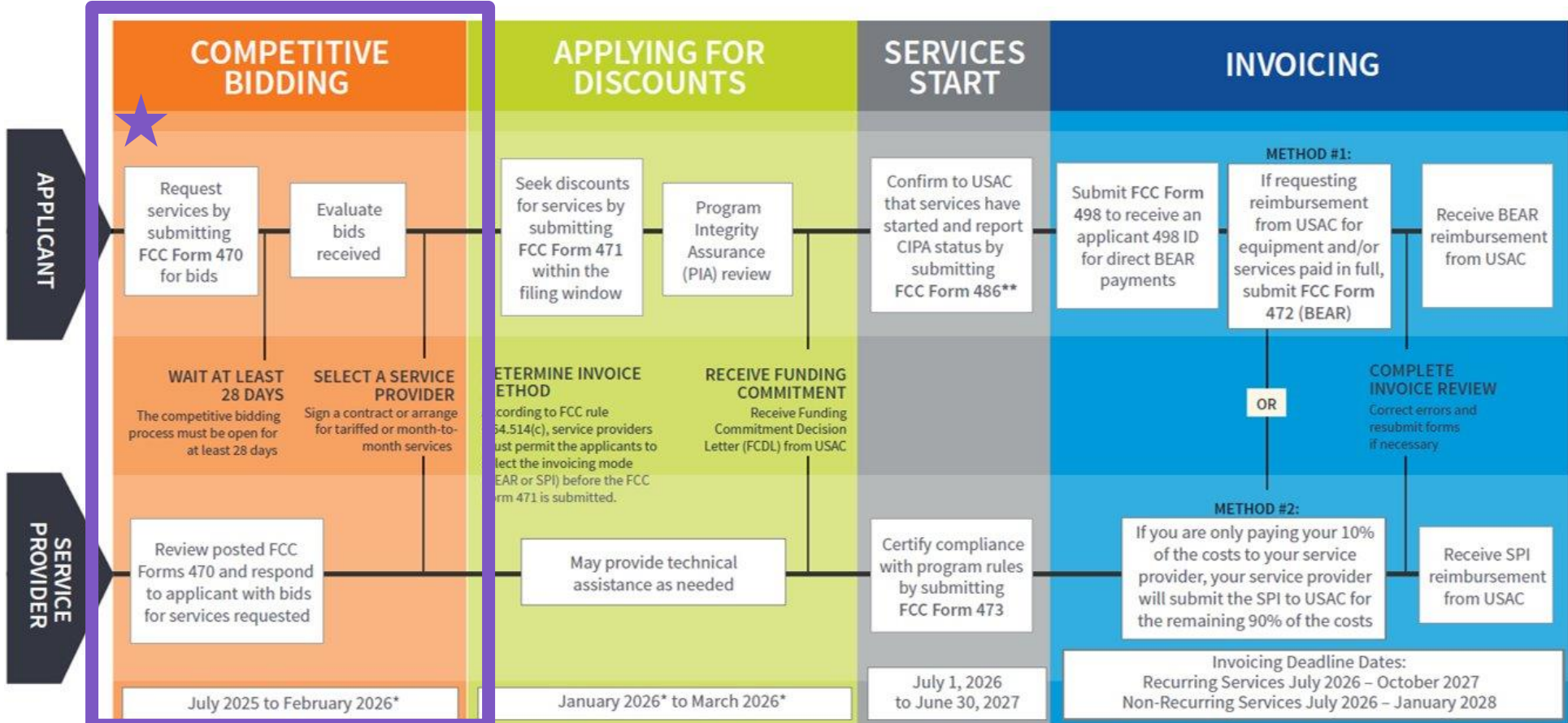
472
(BEAR)
OR
474
(SPI)

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

Competitive Bidding

FCC Form 470

What is the FCC Form 470?



FOR MORE INFORMATION:

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

- 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.

What is Competitive Bidding?

- Competitive bidding is the formal process for applicants to choose the service providers who will provide the requested equipment and services.
- Service providers review the applicant's FCC Form 470 for requested equipment and services, any procurement requirements, and then submit bids.



FCC Form 470: Description of Services Requested and Certification Form

The logo for FCC Form 470, featuring the number 470 in a bold, black, sans-serif font inside an orange rounded square.

FCC Form 470 Overview

- 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 equipment and services must be the most heavily weighed factor.
 - Wait at least 28 days before selecting a service provider.

Requesting Services

- Start your competitive bidding process by filing an FCC Form 470.
 - You may provide a Request for Proposal (RFP) document as well, but it is not required.
 - If included, the RFP document should be added when the FCC Form 470 is certified. If filed separately, you must restart your 28-day waiting period before selecting a service provider.
- Your FCC Form 470 (with or without RFP document) 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 Requirements

- If you are a first-time E-Rate applicant, you can receive services under an existing contract under limited circumstances described below.
 - You can remain with an existing contract if it is still the most cost-effective solution after posting an FCC Form 470, waiting 28 days, and evaluating bids (Kalamazoo Order).
 - More information available on the [Selecting Service Providers](#) page.
- Applicants need to have evidence (signed contract or written notification to your service provider) of a legally binding agreement in place before submitting the FCC Form 471.
- Applicants must carefully consider **all bids received** and then select the most cost-effective service offering, using price as the primary factor in the bid selection. Other factors may be used in the bid evaluation process, but price of the eligible equipment and services must be weighted most heavily.
- An applicant can still participate if only one bid or no bids were received.

Competitive Bidding – Exemptions

All purchases must go through a competitive bidding process, with some exemptions:

- 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**.
- Since FY2024, library requests for **Category 2 (C2)** equipment and services totaling \$3,600 or less annually per library are exempt from competitive bidding requirements if it is cost-effective.

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.
- Alternatively, 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 in their bid evaluation process.

Requesting Services: Requests for Proposals

- **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.
 - In addition, RFPs are required for self-provisioned networks and dark fiber requests.
- 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.

THE COMPETITIVE BIDDING PROCESS

allows applicants to identify and request products and/or services so that potential service providers can review those requests and submit bids for them.



The process consists of five steps:

- 1** Get Ready to File
 - Perform a needs assessment
 - Review your state and local procurement rules
 - Review the [Eligible Services](#) List
- 2** [File and certify an FCC Form 470](#)
 - Provide sufficient information for potential vendors to provide a comprehensive bid (e.g., for managed internal broadband services specify the exact equipment/services to be managed)
 - Potential bidders (service providers) cannot help you file FCC Form 470
 - You have the option to submit a Request for Proposals (RFP) with your form
 - There are [competitive bidding exemptions](#) for certain Category 1 and Category 2 (libraries only) equipment/services
 - After you certify your FCC Form 470, USAC issues a Receipt Notification Letter (RNL) with your Allowable Contract Date (ACD) – the earliest date you can enter into an agreement or sign a contract
- 3** Ensure an [open and fair process](#)
 - Provide any FCC Form 470, RFP and other information/updates in EPC for all potential bidders for at least 28 days
 - “Open” means there are no secrets in the process and that all bidders know what is required of them
 - “Fair” means that all bidders are treated the same and that no bidder has project information others do not
 - Abide by the [Gift Rules](#)
- 4** Wait **at least 28 days** before selecting a service provider
 - The ACD (included on your RNL) is 28 days after the FCC Form 470 is **certified**
 - The day you **certify** the FCC Form 470 is day 1. If the FCC Form 470 is certified on the 1st of the month, you may select a service provider **on or after** the 29th of the month
 - If you later **change the information** needed to respond to the bid, you must restart the 28 days
 - If you issue an RFP on a later date, you must restart the 28 days
 - * State or Local procurement rules may require a longer waiting period
- 5** [Select a service provider](#)
 - Select a service provider after your ACD and before certifying the FCC Form 471
 - Consider all responsive bids
 - Use a [Bid Evaluation Matrix](#)
 - Ensure price is the primary evaluation factor (highest weighted factor). Only the costs of eligible goods/services should be evaluated in this criterion
 - Enter into a legally binding agreement and document selection date (after the minimum 28-day waiting period)
 - Upload your legally binding agreements and contracts to EPC



Retain all competitive bidding documentation, including the Bid Evaluation Matrix, for ten years after the last day you receive services or the end of that funding year, using whichever date is later.



Universal Service
Administrative Co.

Link to Competitive Bidding Infographic:

<https://www.usac.org/wp-content/uploads/e-rate/documents/resources/Competitive-Bidding-Infographic-08.27.2024.pdf>

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 equipment 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 equipment 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)
 - More details available in the Appendix Section of this slide deck

Sample Bid Evaluation Matrix

Factor	Points Available	Vendor 1	Vendor 2	Vendor 3
Price of the eligible products and services	50*	20	50	40
Prior experience with the vendor	25	25	0	25
Prices for ineligible services, products, and fees	15	10	5	15
Local or in-state vendor	10	10	0	0
Total	100	65	55	80

**This number must be higher than all other numbers in the same column.*

Special Cases

- If you only receive one bid, you accept it if it's cost effective.
- If you receive zero bids, you may solicit bids.
- Duplicative (backup or redundant) services are not [eligible](#) for E-Rate support.
- Be sure to abide by our [gift rules](#), which are in effect throughout the funding year.
- Find out more information on special cases in our Fall Training: Pre-Commitment Webinar on September 25, 2025.

If you have any question on these issues, please [Contact Us](#).

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 or the RFP is posted, whichever is later. For example, if you file your FCC Form 470 on January 1, you may select (sign a contract with) a service provider **on or after January 29.**
- **Signed contracts constitute the best evidence that a legally binding agreement exists and must not be signed before the minimum 28-day period is completed.**
- **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.
- **Instructional Videos:**
 - [How to Create a Contract Record](#) (5:58 mins)
 - [How to Create a Contract for Low-Cost High-Speed Internet](#) (4:55 mins)

Allowable Contract Date (ACD) Infographic

CALENDAR						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	Certified FCC Form 470 Day 1	2 Day 2	3 Day 3	4 Day 4
5 Day 5	6 Day 6	7 Day 7	8 Day 8	9 Day 9	10 Day 10	11 Day 11
12 Day 12	13 Day 13	14 Day 14	15 Day 15	16 Day 16	17 Day 17	18 Day 18
19 Day 19	20 Day 20	21 Day 21	22 Day 22	23 Day 23	24 Day 24	25 Day 25
26 Day 26	27 Day 27	28 Day 28	Allowable Contract Date Day 29	30	1	2

Remember

If the 470 narrative or RFP does not include a bid submission deadline



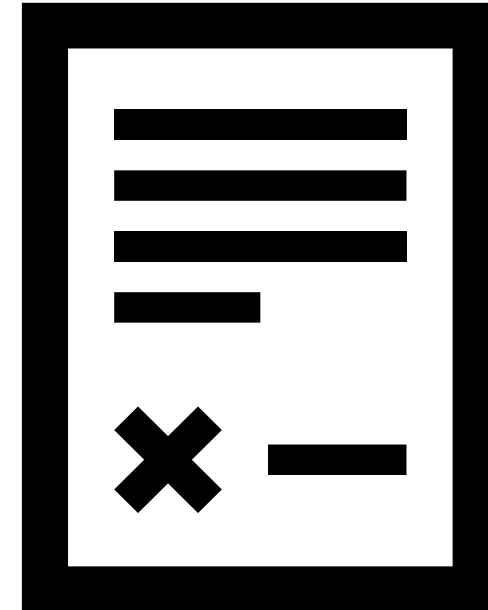
then applicants are **required** to accept all bids up until they conduct their evaluation.

•This is the earliest you can select a vendor.¹
•You can wait up until you certify FCC Form 471 to select a vendor.²

¹ This may vary based on state and local procurement rules.
² You must select a vendor before the filing window closes.

Enter Into a Legally Binding Agreement

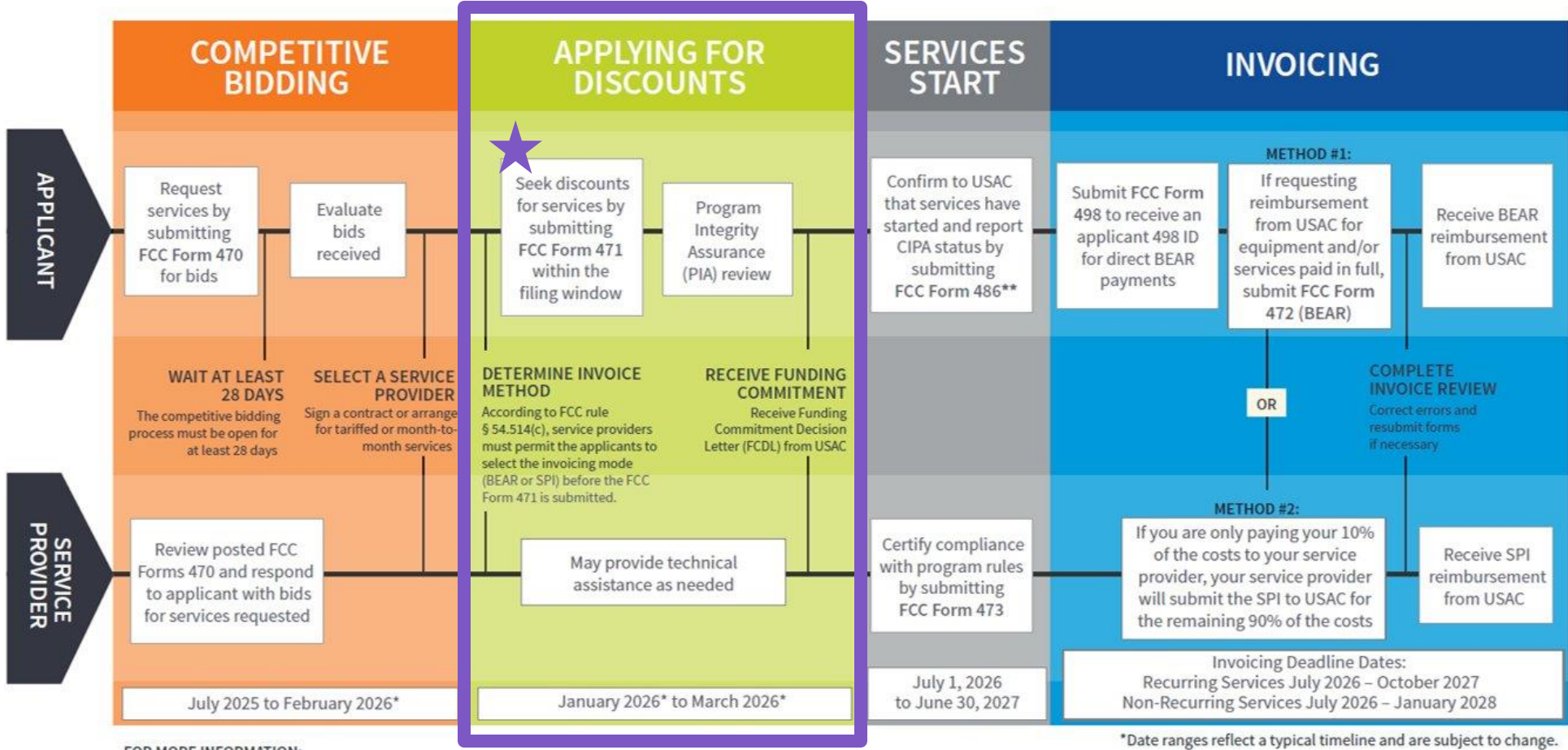
- After selecting a service provider, legally enter into a [binding agreement](#) with them.
- Sign something (a contract, purchase order, etc.) requesting the services from the provider(s).
- Upload the evidence to your [Contract Profile](#) in EPC.



Applying for Discounts

Discounts are calculated and reported to USAC on FCC
Form 471

What is the FCC Form 471?



- 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.

Review Resources for Calculating Entity Discounts

- Entity 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/Tribal 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.

Discount Matrix

Income <i>Measured by percentage of students eligible for NSLP</i>	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	
	Tribal Libraries: FY23 and earlier: 90% for C1, 85% for C2 FY24 and later: 90% C1 & C2	

- National School Lunch Program (NSLP), Category One (C1) Services, Category Two (C2) Services
- The maximum discount rate for FY2024 and later C2 equipment and services was increased by the FCC in FCC 23-56 from 85% to 90% for tribal libraries with NSLP percentages between 75-100%

Filing FCC Form 471

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**.
- 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).

Eligible Software: Key Reminders

- Software can fall into two service types.
- Commitments for different types of software can be for different term lengths.
 - Right to Use Licenses Purchased with Internal Connections – **All years** of the license contract can be billed in a single funding year.
 - For a 3-year contract for 100% eligible licenses at a pre- discounted amount of \$12,000, the full amount of \$12,000 could be entered into a single funding request number (FRN) for that funding year.
 - Software updates are considered basic maintenance of internal connections (BMIC) – Only the **current year** of service can be included in a single funding year, and multi-year software contract amounts must be prorated.
 - For a 3-year contract for 100% eligible BMIC services at a total pre-discounted amount of \$12,000, the FRN could only reflect a single year of expenses, or \$4,000, in a **single funding year**. BMIC services can only be invoiced after they are actually provided/performed.

Eligible Equipment or Services: Key Reminders

- **E-Rate Eligibility:** Equipment or services may be partially eligible under E-Rate depending on the nature of the services and the Eligible Services List (ESL) for a particular year.
- **Applicants are responsible for determining before filing FCC Form 471:**
 1. Total Costs, and
 2. Ineligible portions

How To Determine


Contact the manufacturer or Customer Service Center (CSC) to determine a particular equipment item or service's eligibility before submitting your FCC Form 471 to:

1. Determine eligibility under E-Rate, and
2. Confirm the category of service for that eligibility.

Funding Commitment Decision Letter (FCDL) Terms Defined

- **Pre-Discount:** Total cost of the equipment/services before the E-Rate discount is applied.
- **Discount Amount:** Pre-Discount Amount *times* discount rate.
- **Post-Discounts & Invoicing Amounts:**
 - Total Eligible Charges *times* discount rate equals FRN committed amount on the FCDL.
 - The “Commitment Request” in EPC is the amount eligible for funding and payment through the E-Rate program and for payment during the invoicing process.
- **Non-Discount Amount:** Amount applicant pays for the services/equipment using non-E-Rate funds. The non-discount amount cannot be paid or credited by the service provider.

Relationship Between Unique Numbers



Choose Category 1 or 2	C1 or C2 are filed on separate FCC Form 471s
Application Number FCC Form 471	Each FCC Form 471 is assigned a unique number
Funding Request Number (FRN) Each FCC Form 471 can have one or multiple FRNs	Each FRN must have all of the following information in common: Billed entity number (BEN), contact information, category of service (C1 or C2), service type (data transmission and/or internet access, internal connections, BMIC, managed internal broadband services), FCC Form 470, service provider (SPIN), purchase type (contract, month-to-month, tariff), contract ID (if you have one), service start and end dates.
FRN Line Item	Each FRN Line Item must have all of the following information in common: Equipment or service, rates and quantities, and recipients of service (ROS). Each may have unique or overlapping ROS. Duplicative or redundant services are ineligible.

E-Rate FCC Form 471 Application Terms

- **Application Number** – A unique number that USAC assigns to each FCC Form 471. Each BEN can have one or more applications. Category 1 (C1) and Category 2 (C2) services must be on different applications. BENs applying for both categories of service will need at least two applications.
- **Funding Request Number (FRN)** - A unique number that USAC assigns to each funding request in an FCC Form 471. Each FCC Form 471 application can have one or multiple FRNs.
 - Each FRN must have all of the following information in common: BEN, contact information, Category of Service (C1 or C2), 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), and dates of service.
- **FRN Line Item** - A unique number assigned to each Line Item within the FRN, beginning with the funding request number. For example, the first line item within FRN 2499059243 would be number 2499059243.001. Each FRN can have one or multiple line items.
 - Each FRN line item must have all of the following information in common: Equipment or service, rates and quantities, recipients of service.

E-Rate FCC Form 471 Application FAQs

1. What is the specific equipment or service, and which category does it fall under?

- C1: Data Transmission or Internet Access
- C2: Internal Connections, Basic Maintenance of Internal Connections (BMIC), or Managed Internal Broadband Services (MIBS)
- If you are requesting both C1 and C2 services, you will need to put these requests on **different FCC Form 471 applications**.

2. Is this a contracted or month-to-month service or multiple contracts?

- Services under different contracts, or services provided on a month-to-month basis, must be under **different FRNs**.
- If services are being provided by **multiple service providers**, then **separate FRNs** must be created.

3. What is the exact type of equipment or connection being requested?

- C1 Example: Fiber Ethernet vs. Copper Cable Modem
 - Since both fall under Data Transmission/Internet Access, they may be able to share an FRN using separate line items.
- C2 Example: Switch vs. a License Providing Basic Maintenance Services
 - Since these are separate service types (i.e., Internal Connections and Basic Maintenance of Internal Connections) they require separate FRNs.

4. Are the recipients of service or the dates of service different?

- If either are different, **different FRNs** must be created.

Common FCC Form 471 Application Errors

1. Not correctly classifying the Category of Service or Equipment/Service type on the FCC Form 470

- Determine the equipment/services you need and contact the Customer Service Center (CSC) to verify correct classification of the equipment/services.
- Competitively bid for all necessary equipment and service types by filing an accurate FCC Form 470 that describes the equipment and service(s).

2. Filing an inaccurate FRN with the wrong equipment/service type

- Work with your service provider to ensure that equipment/services are accurately represented on the FCC Form 471.
- Contact the Customer Service Center (CSC) or your Program Integrity Assurance (PIA) reviewer with any questions.

3. Failing to remove ineligible services/equipment.

- Work with your service provider to determine whether your requested equipment/services are 100% eligible.
- Remove any ineligible amounts when creating your FRN(s).

Transitioning Services

- Transition of Services is when an applicant changes from one service and/or one service provider, to another during a funding year. The actual cutover dates may occur during the middle of the funding year and may change from the original planned transition dates.
- **Notifying USAC & Updating your FCC Form 471:**
 - FCC Form 471 is in review: Applicant should submit a RAL Request
 - FCC Form 471 has been Processed: Applicant should submit a SPIN Change or Service Sub Request
 - Changing Service Providers: Processed through a SPIN Change Form.
 - Changing Services: Processed through the submission of a Service Substitution Form.

Transitioning Services

- **Program rules prohibit the funding of duplicative services** (including the same service to the same locations at the same time.)
 - The applicant can apply for funding related to services from the incumbent and the new provider that will be provided during the applicable funding year providing planned cutover dates for each provider.
 - Ensure that the two FRNs for the transitioning service do not request funding for a time period that exceeds 12 months (e.g., if one FRN requests funding for four months, then the other FRN should only request funding for eight months.) The **service period for these two FRNs cannot overlap** and the **total service period** of these two FRNs cannot **exceed 12 months**.

Transitioning Services

- **Scenario:** The cutover date is not at the start of the funding year or the applicant does not know when the new service provider will cut over, or the cutover date changes:
 - Work with the new provider to determine a realistic estimate of the cutover date.
 - The applicant should then request funding for services from the incumbent and the new provider on separate funding requests numbers (FRNs) on the same application (not to exceed 12 months combined).
 - If the cutover date changes, then the applicant can file a post-commit (SPIN and/or Service Sub) request to address this change.
 - If necessary, the original FRN can be split into an additional FRN by USAC during the post-commitment process but the total funding for the related FRNs is limited to the original commitment amount and cannot exceed 12 months of service.

Transitioning Services: Circuits Example

Cutover on the **Same** Date

- Submit two FRNs on the same FCC Form 471 application for all of the circuits.
 - One FRN for the existing service.
 - One FRN for the new service.
 - The cutover date that the applicant previously established with the service provider(s) will inform the service start and end dates for these FRNs.

Cutover on **Different** Dates

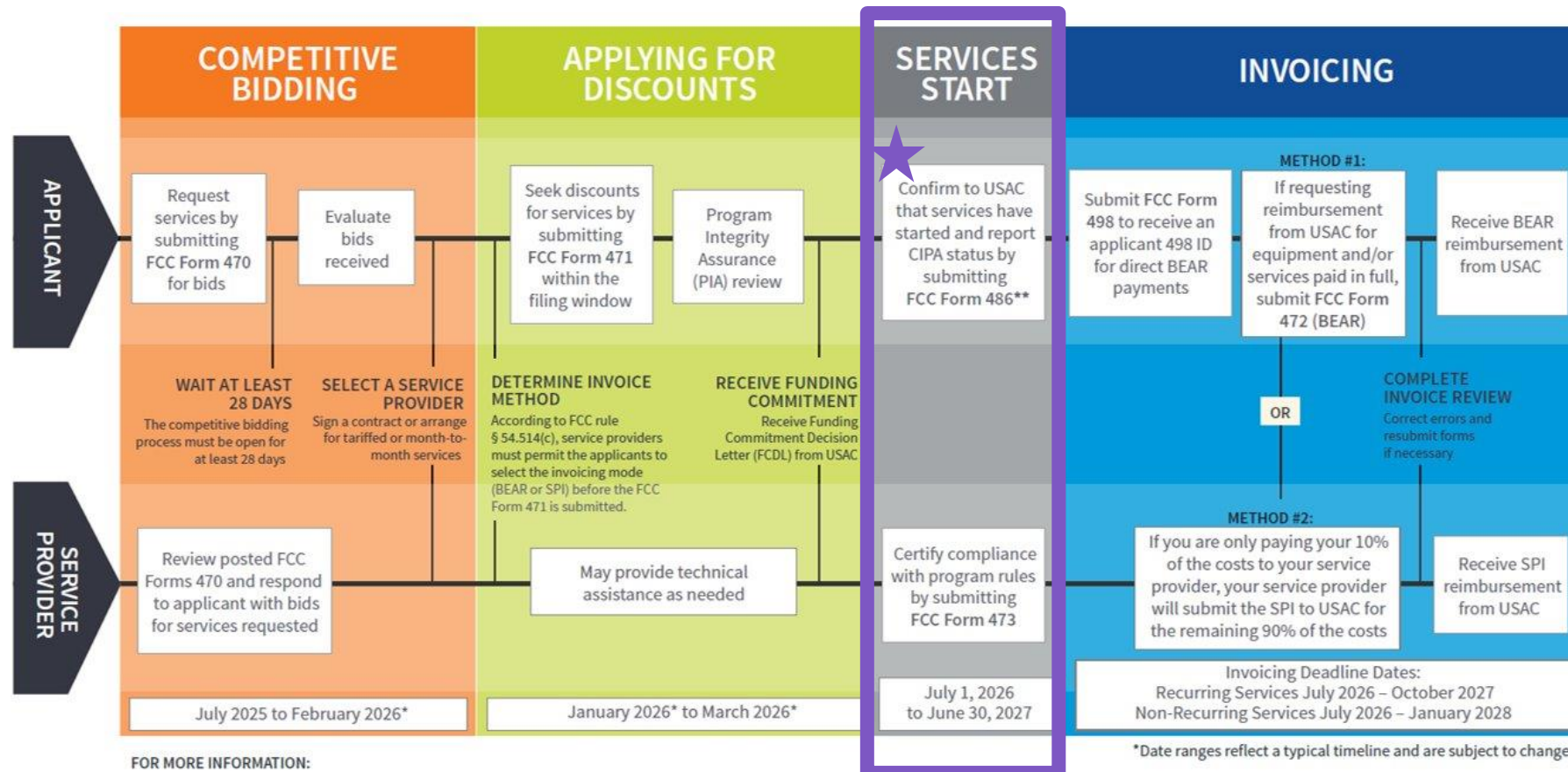
- The applicant should take into account the various transition dates for each circuit when determining how many FRNs they will submit, grouping those with a similar transition date together on the same FRN.
- Submit two FRNs for each circuit.
 - One for the existing service.
 - One for the new service.
 - The cutover date that the applicant previously established with the service provider(s) will inform the service start and end dates for these FRNs.

Transitioning Services: Filing SPIN and/or Service Substitution

- **Narrative:** Explain that due to a Transition of Service issue, the applicant seeks to alter the service start and end dates for specific FRNs. The narrative should include the existing service FRN(s), and new service FRN(s), in addition to the specific changes the applicant would like made to the service start and end dates (i.e., cutover dates). An example narratives:
 - *Service Provider Name1 (SPIN1) will provide Ethernet at 3G starting on 7/1/2026 and ending on 11/30/2026. Service Provider Name2 (SPIN2) will provide Ethernet at 20G starting on 12/1/2026 to 6/30/2027.*
- Submit forms as soon as the cutover date is verified so that USAC can make the necessary adjustments to the affected FRNs.
- [SPIN EPC Change User](#)
- [EPC User Guide: Service Substitutions](#)

After Your FCC Form 471

What is the FCC Form 486/473?



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 FC DL is issued, file the FCC Form 500.

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

- 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**.

Start Services
486

FY2026 Dates

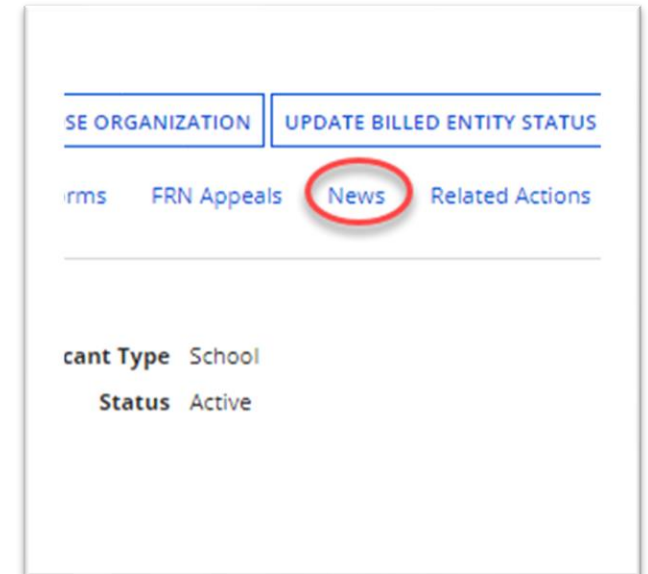
July 1, 2026,
to
June 30, 2027

FCC Form 486 Notifications

- After you submit the FCC Form 486, USAC sends you and your service provider:
 - A confirmation of receipt.
 - A letter informing you of USAC's decision.
- After USAC has approved your FCC Form 486 and services have started, you or your service provider may begin invoicing USAC for the discounted amount of the costs of the approved equipment and services.

Respond to Any "Urgent Reminder" Notification

- If you receive an "urgent reminder" regarding your FCC Form 486, it means you appear to have missed the deadline to certify based on the service start date reported on the FCC Form 471.
- USAC delivers this letter in your **News** Feed within the E-Rate Productivity Center (EPC).
- Applicants have 15 days from the date of the letter to submit and certify the FCC Form 486 without penalty (if the service start date reported on the FCC Form 471 was the actual service start date).



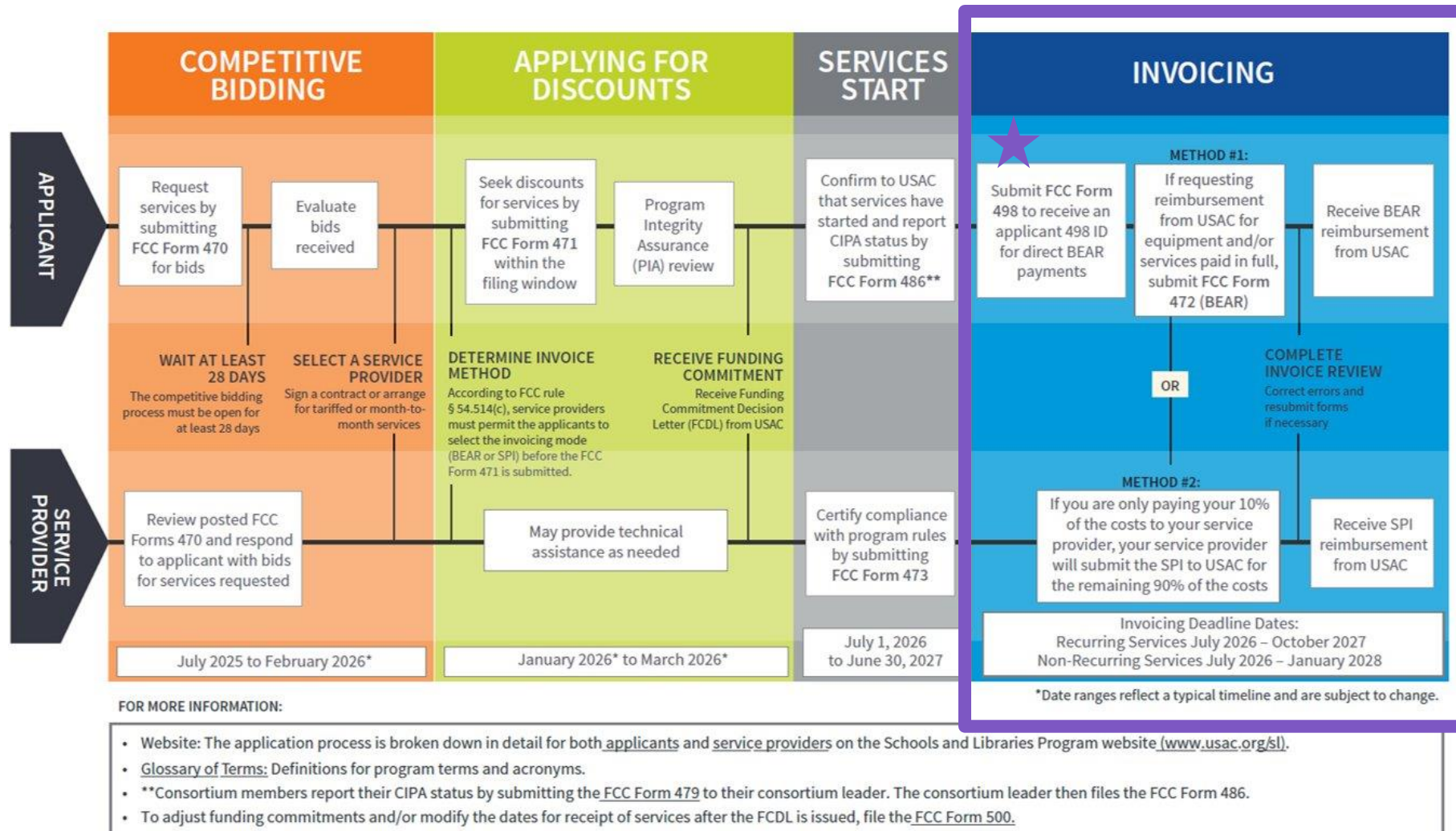
File Service Provider Annual Certification (SPAC)

- Service providers must file an [FCC Form 473](#) (Service Provider Annual Certification (SPAC) Form) to certify that they will comply with Schools and Libraries (E-Rate) program rules and guidelines.
- FCC Forms 473 are filed in the E-Rate Productivity Center (EPC). Only full-rights users can certify an FCC Form 473.
- An FCC Form 473 is required for each [Service Provider Identification Number](#) (SPIN)/498 ID **every funding year** they participate in the E-Rate program
- The FCC Form 473 must be on file with USAC **before USAC pays an invoice**.
- Use the [Service Provider Download Tool](#) to view data from EPC (i.e. SPIN, SPAC field).
- View the Service Provider Course 1 [e-Learning Module](#); see module 2 for information on the FCC Form 473/SPAC form.

SPAC
473

Invoicing Overview

What is the FCC Form 472/474?



Invoicing Essentials

- Invoices for **2016 and after** are processed in **EPC**
- Invoices from **2015 and before** are processed via **customer service case**
 - FY 2015 invoices and earlier remain in the legacy system
 - Download the form dated 2016 in the existing format, complete it, then open a customer service case to get the invoice processed
- **Disbursements are weekly**
- The program rules remain the same for the:
 - 10-year documentation retention period
 - Eligibility of equipment and services

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 specific to the Funding Request Number (FRN).
 - Non-reversible once the method is chosen.
- Two Options:
 - FCC Form 472 (Billed Entity Applicant Reimbursement (BEAR) Form)
 - FCC Form 474 (Service Provider Invoice (SPI) Form)
- Once USAC processes an invoice for an FRN, the method of invoicing is set for that FRN and cannot be changed.
- Billed rates must not exceed contracted rates and USAC will only pay up to the committed and contracted rates.

**BEAR FCC
Form
472**

**SPI FCC
Form
474**

When to File an Invoice

- File after equipment and/or services are delivered and paid.
- Reminder, indicate 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.
 - Filers are entitled to one, 120-day Invoicing Deadline Extension per FRN
 - You must file your invoice or deadline extension request BEFORE the invoice deadline
 - [Extensions are filed by the applicant and service providers within EPC](#)

**BEAR FCC
Form
472**

**SPI FCC
Form
474**

Invoice Deadline Extension

- Filers are entitled to one, 120-day invoice deadline extension per FRN.
- You can file an invoice deadline extension request even if you do not use or need it.
- You must file your invoice deadline extension request **BEFORE** the invoice deadline.
- [Extension requests are filed by the applicant and service providers within EPC.](#)
- If you miss the deadline to file an invoice or request an extension, you must request and be granted a waiver of the invoice filing deadline from the FCC.

Invoicing Reminders

- Payments:
 - BEAR Invoices: Applicant pays the service provider **in full within 90 days of receiving services and before invoicing USAC.**
 - SPI Invoices: Applicant pays the service provider their **non-discounted** portion within **90 days of receiving services.**
- **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 Recipient(s) of Service.**
- Invoiced amount to USAC must be for **actual charges**, not the amount committed through the E-Rate program.
- Manual calculations for **prorated** amounts must be accurate.
- Billed rates **must not** exceed the contracted rate. USAC will **only pay** up to the **contracted rate**.
- Make sure all equipment purchased is **installed** and in use before the **Service Delivery Date**.
- Establish a process to **prevent duplicate** invoice submission.
- When closing an entity, make sure all invoices have been paid before putting in the request.

Invoicing Appeals

- If your timely-filed invoice is rejected or modified, you have two options:
 - If it is before the IDD, resubmit a corrected invoice.
 - If it is after the IDD, you have the right to appeal the decision.
- Appeals must be filed **first** with USAC.
- You have **60 days** to appeal to USAC.
- Appeals filed more than 60 days after the decision date are **automatically dismissed**, and a waiver must be filed with the FCC.
- If USAC denies the appeal, you have **60 days** to appeal that denial to the FCC.
- Waivers of the Commission's rules, such as the invoice deadline rule, can only be sought from the FCC. An appeal of a timely-filed invoice that is rejected or modified does **not** require a waiver of the invoice deadline rule.
- Additional information on the appeals and waivers is available on [USAC's website](#).

E-Rate Program Compliance

Document Retention

- Applicants and service providers are required to [retain documentation](#) that demonstrates compliance with the statutory or regulatory requirements for all E-Rate program purchases of equipment and services **for a period of at least 10 years** after the latter of the last day of the applicable funding year or the service delivery deadline for the funding request.
- 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.
- For example, for recurring internet access service for FY2023, both the applicant and the service provider must retain all records until **at least** June 30, 2034.

Document Retention (cont.)

- Keep all records such as:
 - Request for Proposal documents
 - Winning and losing bids
 - Vendor correspondence
 - Evaluation matrices
 - Documentation and memos of zero or one bid received (if applicable)
 - Other competitive bidding documentation
 - Asset and Service Inventories
- Records can be kept electronically: Use file names and folder names that are specific and descriptive to help you locate them more easily.
- The [Document Retention List](#) is available in the Resources section of the USAC website.

Protecting the USF and E-Rate Program

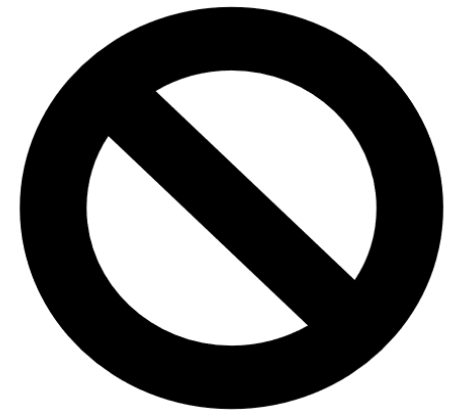
As we focus on preventing fraud, waste, and abuse, it is **extremely important** to take document retention seriously, ensure compliance with program rules, and avoid the appearance of fraudulent activity.

Beneficiaries must comply with program rules and provide USAC, as well as the FCC, with full and correct information upon request.

- E-Rate is a federal program established by the FCC under 47 C.F.R. Part 54.
- Violations of E-Rate program rules, certifications, and/or the United States Code (U.S.C.) are subject to criminal prosecution and financial recovery.
- Please visit our website for more information on [Program Integrity](#).

In our role as stewards of the E-Rate program, USAC must:

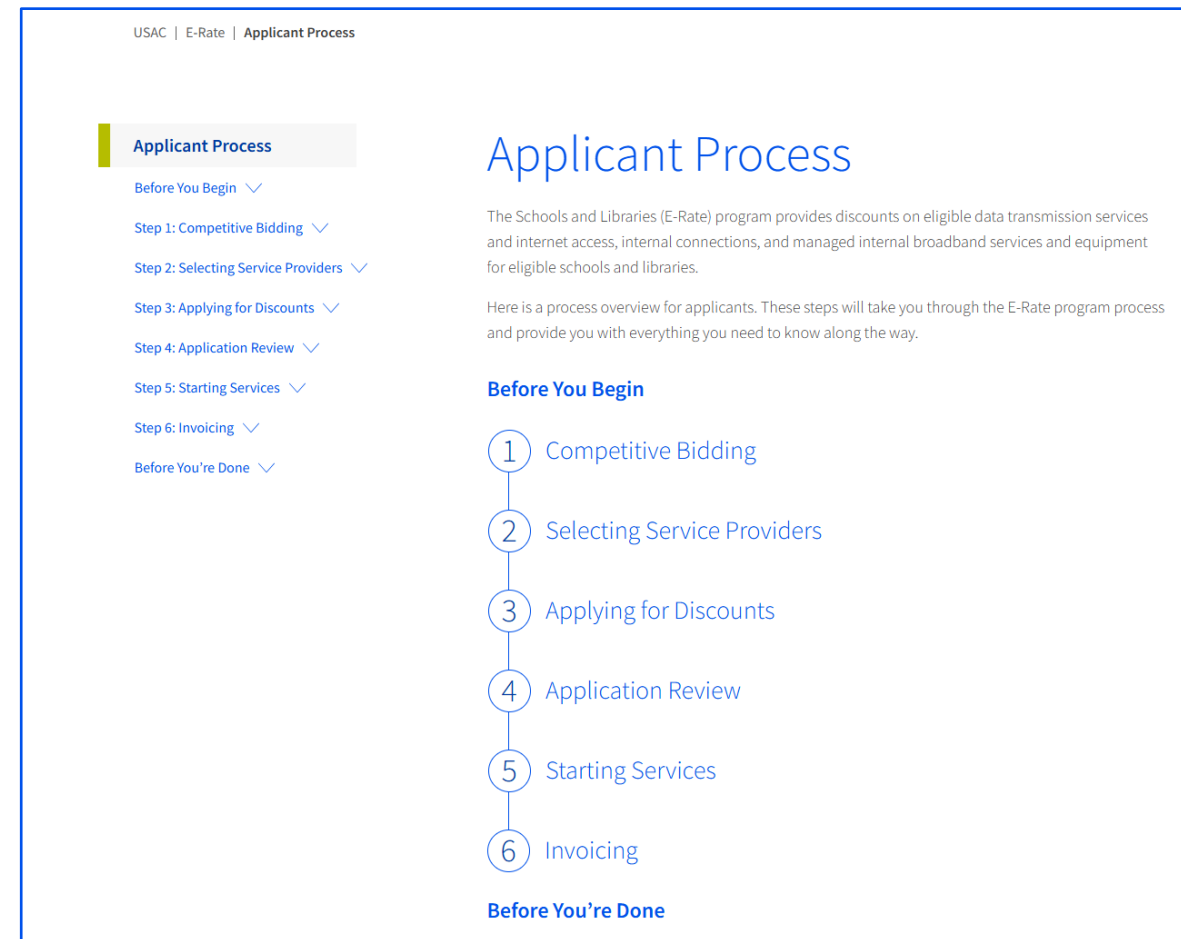
- Process and evaluate information received from program participants and universal service fund contributors.
- Conduct [audits](#) to ensure that funds are being used properly.
- Support investigations by law enforcement for E-Rate and USF.



E-Rate Tools and Resources

E-Rate Tools and Resources: Website

- Step-by-step articles covering the entire application process for applicants and service providers
- [Announcements](#)
- [FAQs](#)
- [Interactive User Guides](#)
- [Videos](#)
- [Webinars](#)
- Infographics
 - [FCC Form 470](#), [Invoicing](#), etc.
- The E-Rate website is accessible [here](#).

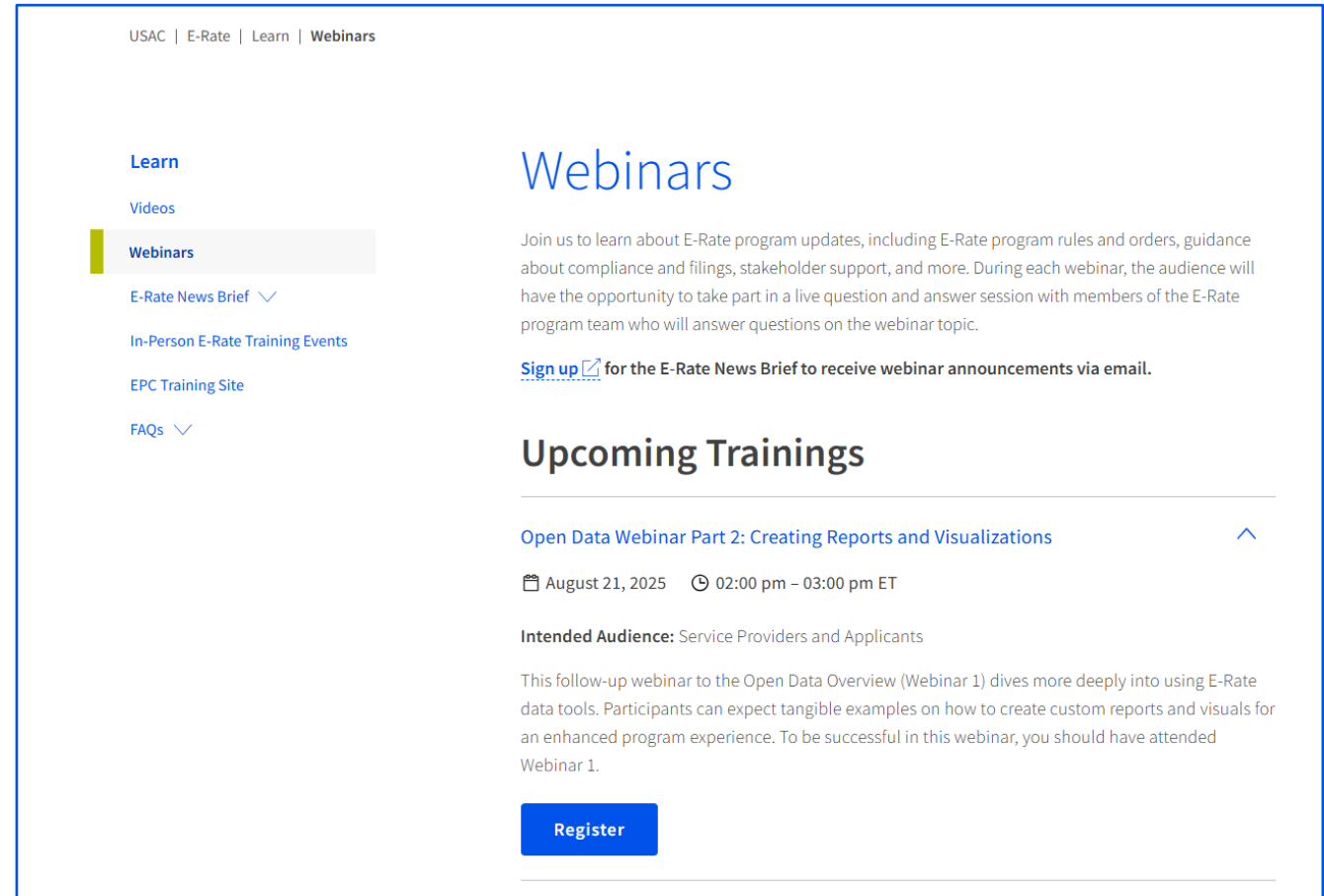


E-Rate Tools and Resources: Interactive User Guides/eLMs

- Interactive User Guide/eLearning Module (eLM) Features
 - Interactive modules incorporating multiple learning styles.
 - Self-paced EPC walk throughs.
 - Review of E-Rate program rules and processes.
 - Links to resources on the E-Rate website.
- Interactive User Guides for the pre and post commitment processes: [Admin Window](#), FCC Forms [470](#), [471](#), [472](#), and [473/474](#).
- New Interactive User Guide for Open Data coming soon.
- Accessible on the [videos page](#) of E-Rate's website and each respective form's webpage (linked above).

E-Rate Tools and Resources: Webinars

- Online training
- Opportunities for Q&A
- Recordings available on the Webinar page of E-Rate's website.
- Hosted throughout the year.
- The Webinars page is accessible [here](#).



The screenshot shows the 'Webinars' page on the E-Rate website. The top navigation bar includes 'USAC | E-Rate | Learn | Webinars'. A left sidebar menu has 'Learn' (with a sub-link 'Videos'), 'Webinars' (highlighted with a yellow bar), 'E-Rate News Brief' (with a dropdown arrow), 'In-Person E-Rate Training Events', 'EPC Training Site', and 'FAQs' (with a dropdown arrow). The main content area is titled 'Webinars' and contains a paragraph about joining to learn about E-Rate program updates. Below this is a link to 'Sign up' for the E-Rate News Brief to receive webinar announcements via email. The section 'Upcoming Trainings' features a card for 'Open Data Webinar Part 2: Creating Reports and Visualizations' scheduled for August 21, 2025, from 02:00 pm to 03:00 pm ET. The intended audience is 'Service Providers and Applicants'. A description of the webinar is provided, and a blue 'Register' button is at the bottom.

USAC | E-Rate | Learn | Webinars

Learn

Videos

Webinars

E-Rate News Brief ▾

In-Person E-Rate Training Events

EPC Training Site

FAQs ▾

Webinars

Join us to learn about E-Rate program updates, including E-Rate program rules and orders, guidance about compliance and filings, stakeholder support, and more. During each webinar, the audience will have the opportunity to take part in a live question and answer session with members of the E-Rate program team who will answer questions on the webinar topic.

[Sign up](#) for the E-Rate News Brief to receive webinar announcements via email.

Upcoming Trainings

[Open Data Webinar Part 2: Creating Reports and Visualizations](#) ^

📅 August 21, 2025 ⌚ 02:00 pm – 03:00 pm ET

Intended Audience: Service Providers and Applicants


This follow-up webinar to the Open Data Overview (Webinar 1) dives more deeply into using E-Rate data tools. Participants can expect tangible examples on how to create custom reports and visuals for an enhanced program experience. To be successful in this webinar, you should have attended Webinar 1.

[Register](#)

E-Rate Tools and Resources: News Brief

- Provides reminders, updates, tips and tricks.
- Sent monthly via email.
- Subscribe [here](#).

Available for Public Use

 Universal Service Administrative Co. **E-Rate**

E-Rate News Brief

July 24, 2025

Contents

- [E-Rate Tips](#)
- [Funding Year \(FY\) 2025 Commitments](#)
- [Prepare for the Upcoming Competitive Bidding and FCC Form 470 Process](#)
- [FCC Form 470 Reminders](#)
- [Update to E-Rate Open Data Download Instructions](#)
- [Learn About USAC's Beneficiary and Contributor Audit Program](#)
- [2025 Training and Outreach](#)

E-Rate Tips

- As a reminder, **Funding Year (FY) 2025 applicants who have received a funding commitment** from USAC and whose services have started can certify an [FCC Form 486](#) (Receipt of Service Confirmation and Children's Internet Protection Act Certification Form) to inform USAC that services have started. Subsequently, invoicing can begin.
- **Service providers are required to submit and certify an annual FCC Form 473** (Service Provider Annual Certification (SPAC) Form). USAC cannot pay an invoice from either an applicant (FCC Form 472/BEAR) or a service provider (FCC Form 474/SPI) **unless both the FCC Form 486 and the FCC Form 473 have been certified and approved for FY2025 funding requests.** See [last month's news brief](#) for filing requirements.
- **Visit our updated webpages** including [FCC Form 470 Filing](#), [How to File FCC Form 472 in EPC](#), and [How to File the FCC Form 474 in EPC](#).

Funding Year (FY) 2025 Commitments

FY2025. USAC released FY2025 Wave 13 Funding Commitment Decision Letters (FCDLs) on July 17. As of July 23, FY2025 commitments total over \$1.54 billion.


July 2025 E-Rate News Brief Page 1 of 6

Live Q&A

Submit your questions
about today's topics:

- FCC Form 470
- Competitive Bidding
- Selecting Service Provider
- FCC Form 471
- Applying for Discounts
- SPAC
- Invoicing

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?

E-Rate Customer Service Center (CSC)



Call us at (888) 203-8100

Monday – Friday 8 a.m. to 8 p.m. ET

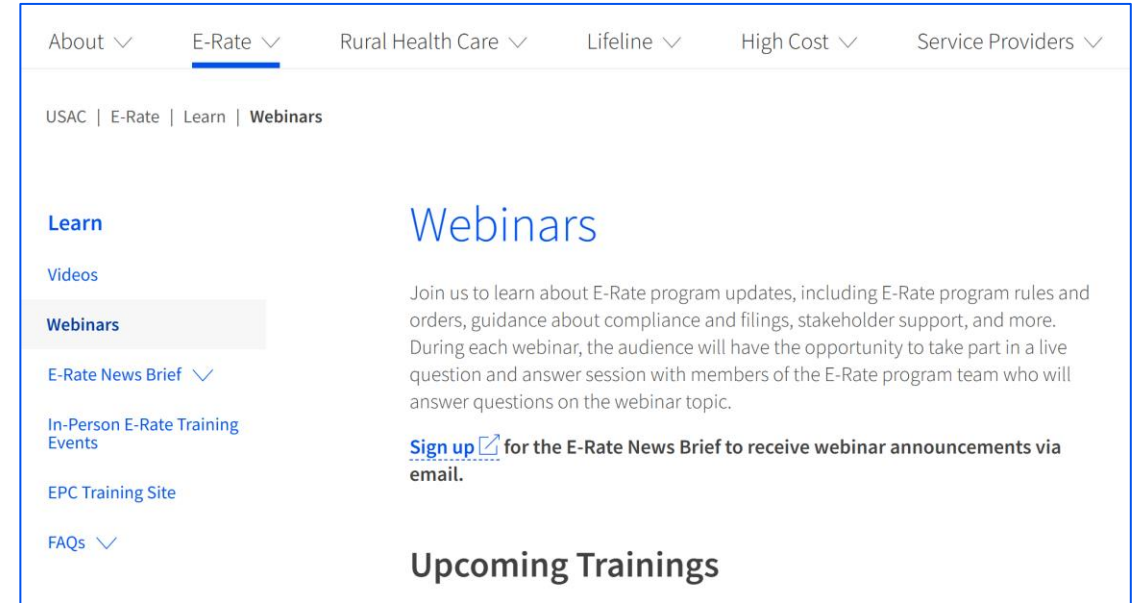
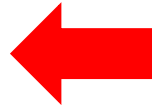


Create a customer service case

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.

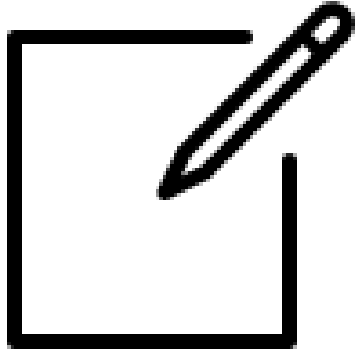
E-Rate Fall Training Series 2025

- ✓ E-Rate Program Overview - September 18
- ❑ **Pre-Commitment** - September 25
- ❑ Category Two Budgets - October 16
- ❑ EPC Admin Window - October 21
- ❑ Post-Commitment - October 23
- ❑ Invoicing - October 30
- ❑ Eligible Services - November 6



- The E-Rate Fall Training Webinar Series is suitable for all E-Rate experience levels.
- Webinars are recommended for both applicants and service providers.
- Please visit the E-Rate [Webinars](#) page for additional information including course descriptions, registration links for future webinars, and access to recordings and handouts from previous webinars.

Share Your Thoughts



- We want to hear about your webinar experience.
- A survey will appear on your screen at the end of the webinar.
- If you are not able to complete the survey today, a link to it will be emailed to you within two business days.
- We appreciate your feedback!

Thank You!





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