



E-Rate Pre-Commitment Process

September 25, 2025

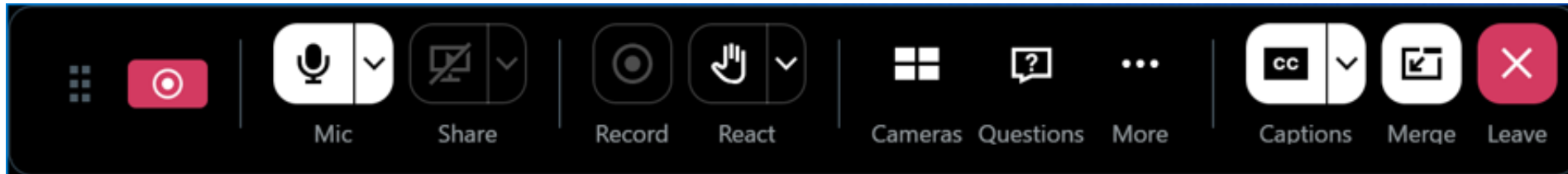
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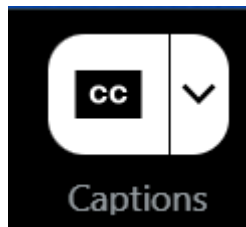
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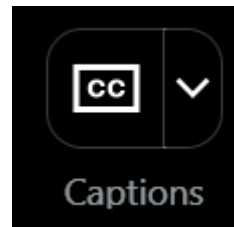
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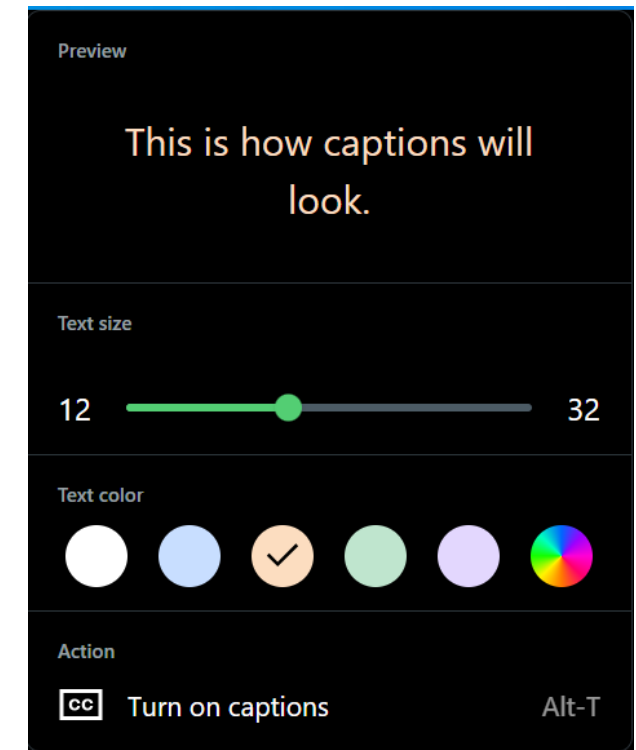
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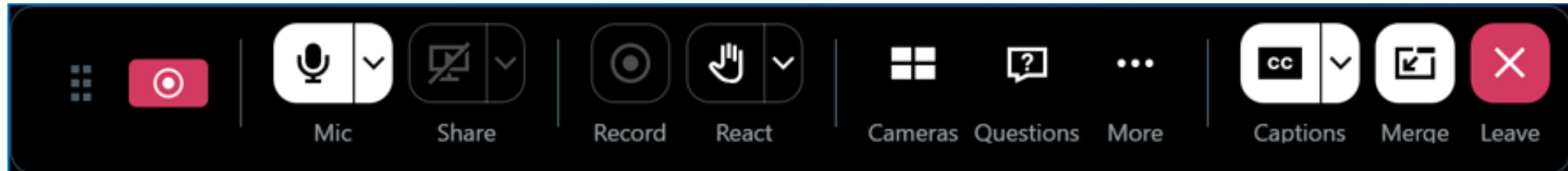
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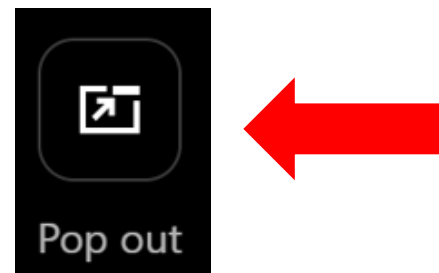
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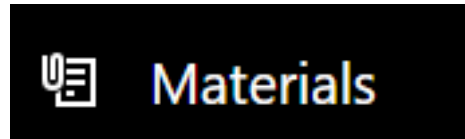


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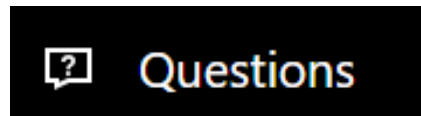


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Questions

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E-Rate Customer Service Center (CSC)



Call us at (888) 203-8100

Monday – Friday 8 a.m. to 8 p.m. ET



Create a customer service case

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

MEET THE TEAM



Cedric Watkins

Program Analyst | E-Rate



Shawn Jensen

Program Manager | E-Rate



Lisette LaForge

Program Manager | E-Rate

Agenda

- Applicant Process
- Competitive Bidding Overview
- File and Certify an FCC Form 470
- Select a Service Provider
- What is the FCC Form 471?
- Application Review
- Resources
- Q&A

Applicant Process

Know Your Role in the E-Rate Process: Applicants

Applicants	Service Providers
<ul style="list-style-type: none">• Determine services needed, file FCC Form 470.• Conduct the competitive bidding process.• Select winning bidder with price of eligible equipment and services as primary factor.• Respond to Program Integrity Assurance (PIA) questions.• File other applicant forms (FCC Forms 471, 486, 472, 500, etc.).• Document compliance with FCC rules (ongoing).• Retain documentation for at least 10 years from last date of service delivery.	<ul style="list-style-type: none">• Respond to FCC Form 470 and any RFP.• May assist with responding to PIA questions on technical services questions (but not competitive bidding).• File service provider forms (FCC Forms 473, 474, etc.).• Document your compliance with FCC rules (ongoing).• Retain documentation for at least 10 years from last date of service delivery.

Applicant Process - Overview

Pre-Commitment Steps

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

Request funding
(FCC Form 471)
and undergo
application review

Post-Commitment Steps

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

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

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

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

470

471

486

472
(BEAR)
OR
474
(SPI)

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

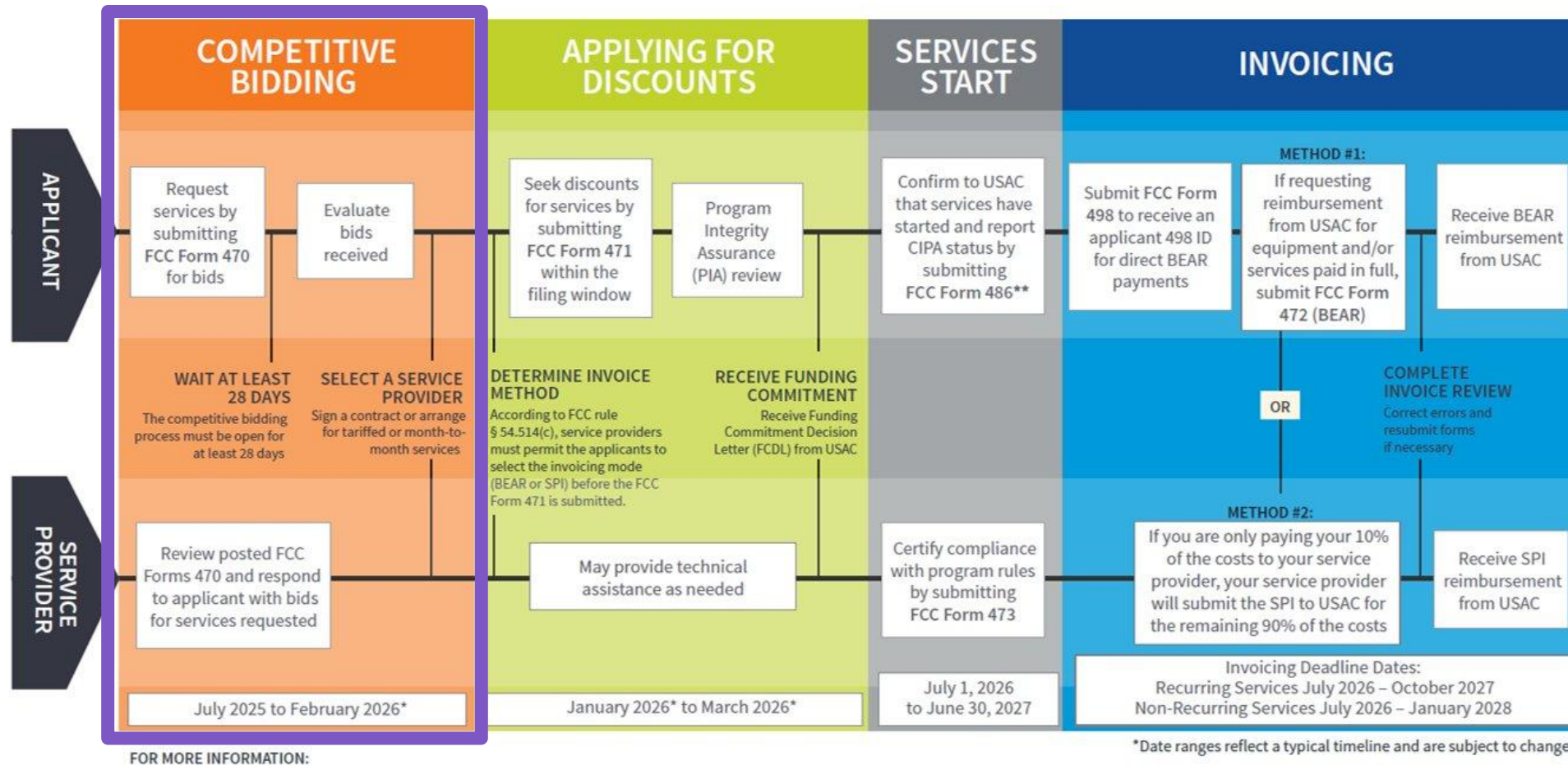
Competitive Bidding Overview

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.



The E-Rate Application Process: FY26



- 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.

Competitive Bidding Steps



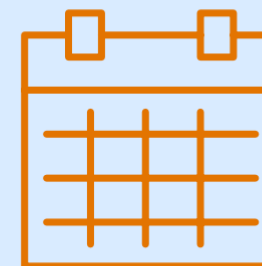
THE COMPETITIVE BIDDING PROCESS

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>

Get Ready to Request Bids

Plan Your Project

Plan the scope of your project and the equipment and services needed.

- Review any state or local competitive bidding and procurement (purchasing) requirements that apply to you.
- Review the [FCC Form 470 Guiding Statements Table](#) to assist with determining the services needed and being requested.
- Understand concepts of [Entity Eligibility](#) and [Service Eligibility](#)
 - Review the [Eligible Services List \(ESL\)](#) for the current funding year to see what equipment and services are eligible for E-Rate program funding.

Be Aware Of “Mixed Eligibility” Products/Services

- **Mixed eligibility** refers to equipment and services for which only a portion is eligible for discounts under the E-Rate program.
- In general, a [cost allocation](#), separating the eligible and ineligible costs, is required if an equipment or service:
 - Contains both eligible and ineligible components — for example, a data T1 circuit (eligible) that also has channels on the circuit dedicated to voice services (ineligible);
 - Is utilized for eligible and ineligible uses — for example, a server that is used for both caching (eligible) and video distribution (ineligible); or
 - Is delivered to both [eligible and ineligible locations](#) — for example, broadband service delivered to a school run by a church (eligible) and to the church office (ineligible).
- There is no single approved method to allocate eligible and ineligible costs. Your method must use tangible criteria that result in a reasonable allocation.

File and Certify an FCC Form 470

File an FCC Form 470

- The applicant must file and certify an [FCC Form 470](#) to initiate the competitive bidding process.
 - Describe your desired services and requirements with sufficient specificity for service providers to be able to submit responsive bids.
 - No generic descriptions (e.g., all Digital Transmission Services).
 - You may also include additional bidding documentation such as a [Request for Proposals](#) (RFP) with your FCC Form 470.
 - RFP generically refers to any bidding document that describes the applicant's project and requested equipment and services in more detail.
 - Services requested on the FCC Form 470 and RFP **must** match.

When to File the FCC Form 470

- The FCC Form 470 must be filed every year for services provided under tariff, on a month-to-month basis, or for those seeking new services under contract.
- It must be filed **at least** 28 days before filing FCC Form 471.
 - Multi-year contracts: You **do not** need to file a new FCC Form 470 if the contract is still in effect and the costs/services are still within the terms of the establishing FCC Form 470 (but you do still need to file a new FCC Form 471 requesting E-Rate support each funding year).
 - After the contract's initial term is over, you will need to recompetete the contract.
- Competitive Bidding Exemptions:
 - Category One: [Low-Cost High-Speed Internet Access](#)
 - Category Two: [Low Cost Internal Connections \(Libraries only\)](#)

Receipt Notification Letter (RNL)

- After posting FCC Form 470, USAC issues a Receipt Notification Letter (RNL) in your EPC News feed.
- Review your submitted FCC Form 470 carefully. If you need to make corrections, do the following:
 - For minor changes (see the [Ministerial and Clerical Errors](#) page on the E-Rate website), locate the form in EPC, and choose “Related Actions” to submit allowable corrections.
 - For significant changes to your form, you must file a **new** FCC Form 470 or restart your 28-day waiting period.
- The Receipt Notification Letter contains your Allowable Contract Date, which is 28 days after the certification date of your FCC Form 470.

Keep Equipment and Service Requests General

- Do not list the specific make and model of equipment and services sought without also considering equivalent alternatives.
 - Example: “XYZ manufacturer's router model 345J **or equivalent**”
 - EPC will automatically add the “**or equivalent**” language in the FCC Form 470 unless the applicant selects "Other" for the Manufacturer Description. In this case, the applicant will manually write in "or equivalent" when entering their description.
 - Remember to double check your RFP if using one.

Disqualification Factors

- You can disqualify bids if they don't meet the requirements. Bidder disqualification criteria must:
 - Be spelled out in FCC Form 470 and/or RFP, and
 - Be available to **all** potential bidders.
- The following items are examples of bid disqualification reasons:
 - Service provider not registered with the state procurement office.
 - Service provider does not have a Service Provider Identification Number (SPIN), also known as the service provider's [498 ID](#).
 - Service provider must have an FCC RN.
 - Service provider is not bonded.
 - Service provider's bid must directly address requested equipment and services.

Competitive Bidding Tip

When unsure whether a service falls under one of two service types, you are allowed to request bids for **both** service types.

For example, if you are unsure whether a piece of equipment or a service falls under Internal Connections or BMIC, you have the option to seek bids for both.



Ensure an Open and Fair Process

Open and Fair

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

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



Open and Fair Guidelines

- All applicants must comply with all E-Rate, state, and local procurement requirements.
- Applicants cannot have a relationship with service providers that would unfairly influence the outcome of the competitive bidding process.
- Applicants cannot give anyone inside competitive information.
- Applicants cannot have ownership interest in the company of a service provider that is competing for services.
- Applicants **must** describe the desired equipment and services with sufficient specificity to enable interested parties to bid.
- Applicants cannot receive gifts or donations from service providers that violate or seek to circumvent FCC rules.
- Applicants **are not** required to show “proof” of E-Rate participation or share their bid evaluation information with any service provider.

Create A Bid Evaluation Matrix

- 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.
 - You may also have disqualifying 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 can be considered, but they must be weighted less than the price of eligible equipment and services.

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.

Abide by the Gift Rules

- [Receipt or solicitation of gifts](#) by applicants from service providers (and vice versa) is a competitive bidding violation.
- Service providers may not offer or provide any gifts or thing of value to applicant personnel involved in E-Rate.
- Gift prohibitions are always applicable – not just during the competitive bidding process.
- Exceptions for gifts – limited to items worth \$20 or less, including meals or prizes, and cannot exceed \$50 from one service provider to each individual per funding year.
- Watch our [Gift Rules video](#) for more details on the gift rules.

Wait at Least 28 Days

28-Day Waiting Period Review and Reminders

Applicants must wait at least 28 days after certifying their [FCC Form 470](#) before selecting a service provider, executing any contracts for contracted services, or signing and submitting an [FCC Form 471](#). The allowable contract date is the earliest date on which an applicant can select a service provider. See your Receipt Notification Letter.

Your state or local procurement regulations may require a longer waiting period or impose additional requirements.

Frequently Asked Questions (FAQs) on the 28-day waiting period:

- **When does the waiting period start?** *The calendar day **after** you certify your FCC Form 470, the day you certify is day one. For example, if you certify on 1/1/2025, the waiting period starts on 1/1/2025, and your Allowable Contract Date is 1/29/2024. If you add a Request for Proposals after certifying the FCC Form 470, you may be required to restart the 28-day waiting period.*
- **Do weekends count as a part of the 28 days?** *Yes, the 28-day period is based on calendar days.*
- **When can you select a vendor?** *After the 28-day waiting period (unless your FCC Form 470 lists a later bid deadline.)*
- **When's the last day you can select a vendor?** *You must select the most cost-effective service offering before you submit the FCC Form 471.*
- **When can you stop receiving bids?** *You may set a bid deadline and include it to your narrative or RFP. This deadline must be at least 28 days after verifying your FCC Form 470 or longer depending on state rules. If you **do not add a deadline to your narrative or RFP**, you must accept bids up until you evaluate bids and make a vendor selection. These deadlines should be memorialized in your records.*

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.

FCC Form 470: Allowable Contract Date Changes

- RFP Upload
 - Allow users to upload an RFP document to any non-cancelled Form 470, even if that Form 470 did not originally have an RFP.
- Substantial Change Question/New Layout to RFP Upload Screen
 - New Yes/No question: Does this new RFP constitute a substantial change to your FCC Form 470?

The screenshot shows the 'Add an RFP to FCC Form 470' screen in the Appian interface. The top navigation bar includes 'News', 'Tasks (70)', 'Records', 'Reports', and 'Actions'. The user's profile is visible in the top right corner.

Add an RFP to FCC Form 470
 QC Smile School District - Used for Dashboard testing - Test ACD reset - Form #250000201 - Funding Year 2025

Upload RFP

Changes to the FCC Form 470, including uploading a new RFP document, may require applicants to restart the 28-day waiting period before selecting a service provider, signing a contract, or submitting and certifying an FCC Form 471. Ministerial or clerical errors, such as updating contact information, do not require a reset of the 28-day waiting period. However, changes that materially affect the competitive bidding process, such as changing the services or equipment being requested, do require restarting the 28-day waiting period.

If you are requesting bids for additional equipment, services, or recipients of service not included on the original FCC Form 470, you may need to file a new FCC Form 470.

Please review the [USAC.org](https://www.usac.org) for additional guidance.

Does this new RFP constitute a substantial change to your FCC Form 470? *

☐ Yes
☐ No

If you select yes, the 28-day waiting period will reset, and the Allowable Contract Date on your FCC Form 470 will be updated accordingly. If the new Allowable Contract Date prevents you from certifying the FCC Form 471 before the application window closes, you must request a waiver from the Commission after certifying the FCC Form 471.

Uploading a new RFP document with substantial changes and not waiting the minimum 28 days may result in denial of funding.

Please add an RFP here

UPLOAD Drop file here

Associate RFP to Service Request(s)

Category 1: Data Transmission and/or Internet Access

Please select the service request(s) that apply to the RFP uploaded above.

Allowable Contract Date (ACD) Changes (cont.)

- ACD Automatic Reset
 - When “Yes” is selected for substantial change question, the allowable contract date will automatically update to extend by 28 days.
 - Day of modification/new RFP is day ONE. ACD on Summary screen will change to reflect new date.
- ACD Automatic Reset Validations
 - ACD cannot be reset if the FCC Form 470 is referenced on an FRN which is not cancelled. Error message will appear.
 - Form 471 cannot be certified if an FRN is citing an FCC Form 470 whose ACD is in the future. Error message will appear.
 - If the offending FCC Form 470 is removed from the application, the app can be certified.

While You Wait

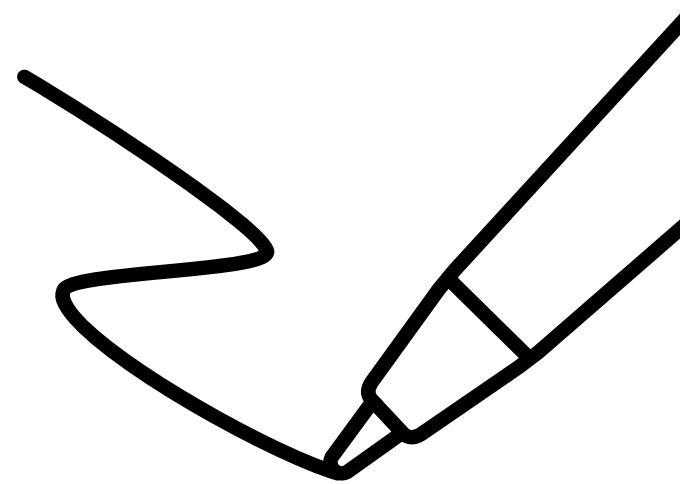
- After applicants file and certify their FCC Form 470, they must wait a minimum of 28 days before selecting a service provider.
- Use the 28-day waiting period to:
 - Receive bids.
 - Respond to service provider inquiries regarding your project.
 - Be sure that any information provided to one service provider is provided to all bidders.
- Evaluate the bids using your factors and bid evaluation matrix.

Next Steps After the 28-Day Waiting Period



What If You Receive No Bids?

- If applicants receive no bids or only one bid, they can:
 - Proactively solicit bids after waiting 28 days.
 - Ask their current provider to submit a bid.
 - Accept the one bid, if it is cost effective.
- Be sure to create a memo for your E-Rate files to document the situation.

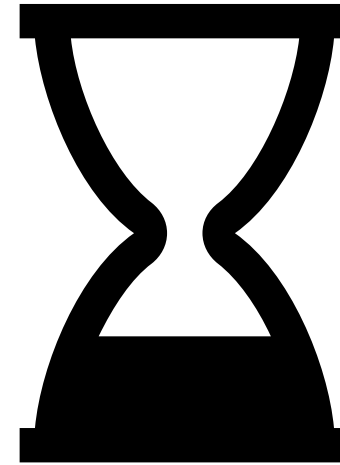


Select a Service Provider

Allowable Contract Date

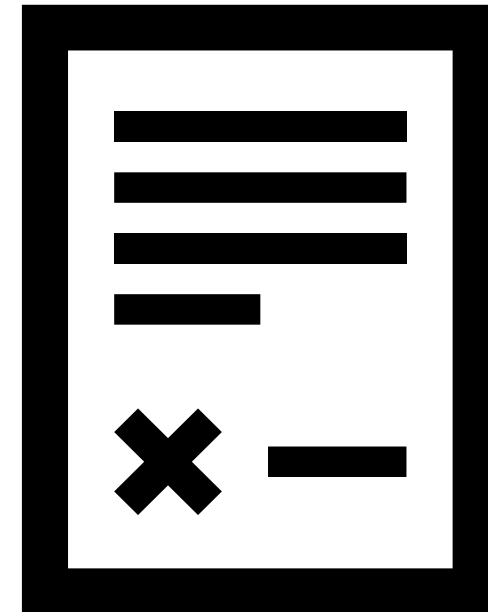
- Wait 28 days
- Evaluate all bids
- Select the service provider(s)

Reminder: Your Allowable Contract Date is printed on your Receipt Notification Letter.



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.



Additional Information

USAC Does Not Pay for Duplicative Services

- **Duplicative services** are services that provide the same functionality for the same population in the same location during the same period of time. USAC cannot fund duplicative services.
- **Backup services** are services sought to reduce reliance on any single service provider's network during an outage and are considered duplicative.
- Services that provide necessary bandwidth requirements, such as multiple T-1 lines when appropriate for the population served and the services to be received, may not be considered duplicative. However, the applicant must still evaluate and choose the most cost-effective option from the bids received.

State Master Contracts

- A [state master contract](#) (SMC) is competitively bid and put in place by a state government for use by entities in that state.
- If the state files an FCC Form 470:
 - The applicant cites the state's FCC Form 470 on its FCC Form 471.
 - The applicant is required to follow the applicable provisions of the state master contract and state and local procurement laws.
 - No separate bidding documents or contracts are required by the applicant citing the state's FCC Form 470, other than what is required by the state master contract and state and local procurement laws.
 - The signed state master contract between the state and the service provider must meet the FCC signed contract requirement.

Bid Awards

- **Single winner:** Single vendor wins the bid
- **Multiple Award Schedule:** State awards contract for same equipment and services to multiple vendors that can serve the same population.
 - If the state awards contracts to multiple service providers, the applicant must conduct a bid evaluation for all service providers able to provide services to the applicant under these contracts (a mini-bid process).
 - Justify vendor selection.
 - Remember to include in your mini-bid all contracts on the multiple award schedule that provide the services sought.

Common Missteps and Bidding Errors

- Failure to provide **complete and accurate** information on the FCC Form 470 and RFP, such as:
 - Correct category and service type.
 - Appropriate details on the project, deadlines, and other necessary requirements.



Common Missteps and Bidding Errors (cont.)

- Failure to retain all competitive bidding documents.
 - Retain the Bidding Matrix showing that:
 - Price was the most highly-weighted factor.
 - You carefully considered all bids received.
 - Retain winning and losing bids.
 - If you only received one bid, create a memo to document that fact for your files.



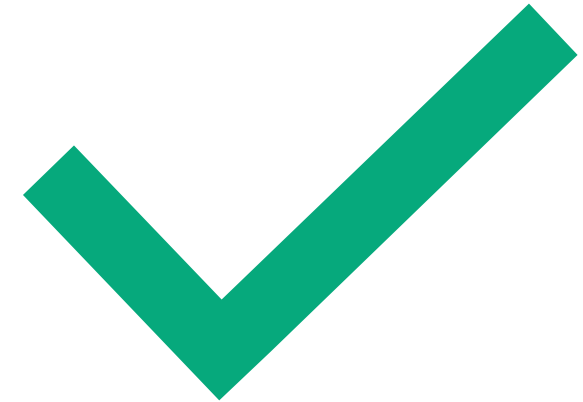
Common Missteps and Bidding Errors (cont.)

- Failure to wait **the full 28-day waiting period**.
 - Count from the date of certification on the FCC Form 470.
 - Be sure to select a service provider **on or after** the Allowable Contract Date.



Avoid Mistakes: Establish Your Contract Correctly

- ☐ The contract contains the applicant's signature and date of when the contract was executed.
- ☐ The legally binding agreement contains all the material terms and conditions and contains a written acceptance of the offer.
- ☐ The contract/legally binding agreement was negotiated on or after the Allowable Contract Date on the FCC Form 470.
- ☐ The contract/legally binding agreement was negotiated/executed on or before the submission of the FCC Form 471.



The Service Provider's Role

Know Your Role in the E-Rate Process: Service Providers

Applicants	Service Providers
<ul style="list-style-type: none">• Determine services needed, file FCC Form 470.• Conduct the competitive bidding process.• Select winning bidder with price of eligible equipment and services as primary factor.• Respond to Program Integrity Assurance (PIA) questions.• File other applicant forms (FCC Forms 471, 486, 472, 500, etc.).• Document compliance with FCC rules (ongoing).• Retain documentation for at least 10 years from last date of service delivery.	<ul style="list-style-type: none">• Respond to FCC Form 470 and any RFP.• May assist with responding to PIA questions on technical services questions (but not competitive bidding).• File service provider forms (FCC Forms 473, 474, etc.).• Document your compliance with FCC rules (ongoing).• Retain documentation for at least 10 years from last date of service delivery.

Service Providers – Bid on Services

- The **applicant** starts the [competitive bidding process](#) by posting one or more FCC Forms 470 and Request(s) for Proposals (RFP) documents, if applicable, to the USAC website.
 - These documents may include specific requirements for service providers to follow during the competitive bidding process.
- **Service providers** [review the information and bid on the requested services](#).
 - Use [FCC Form 470 tools](#) to search and view FCC Form 470 service requests and RFPs.
 - The bid should include information on E-Rate eligibility percentage and category of service.
 - The bid should be responsive to the equipment and services being requested.



Open and Fair – Service Providers

To help ensure an open and fair process, service providers should:

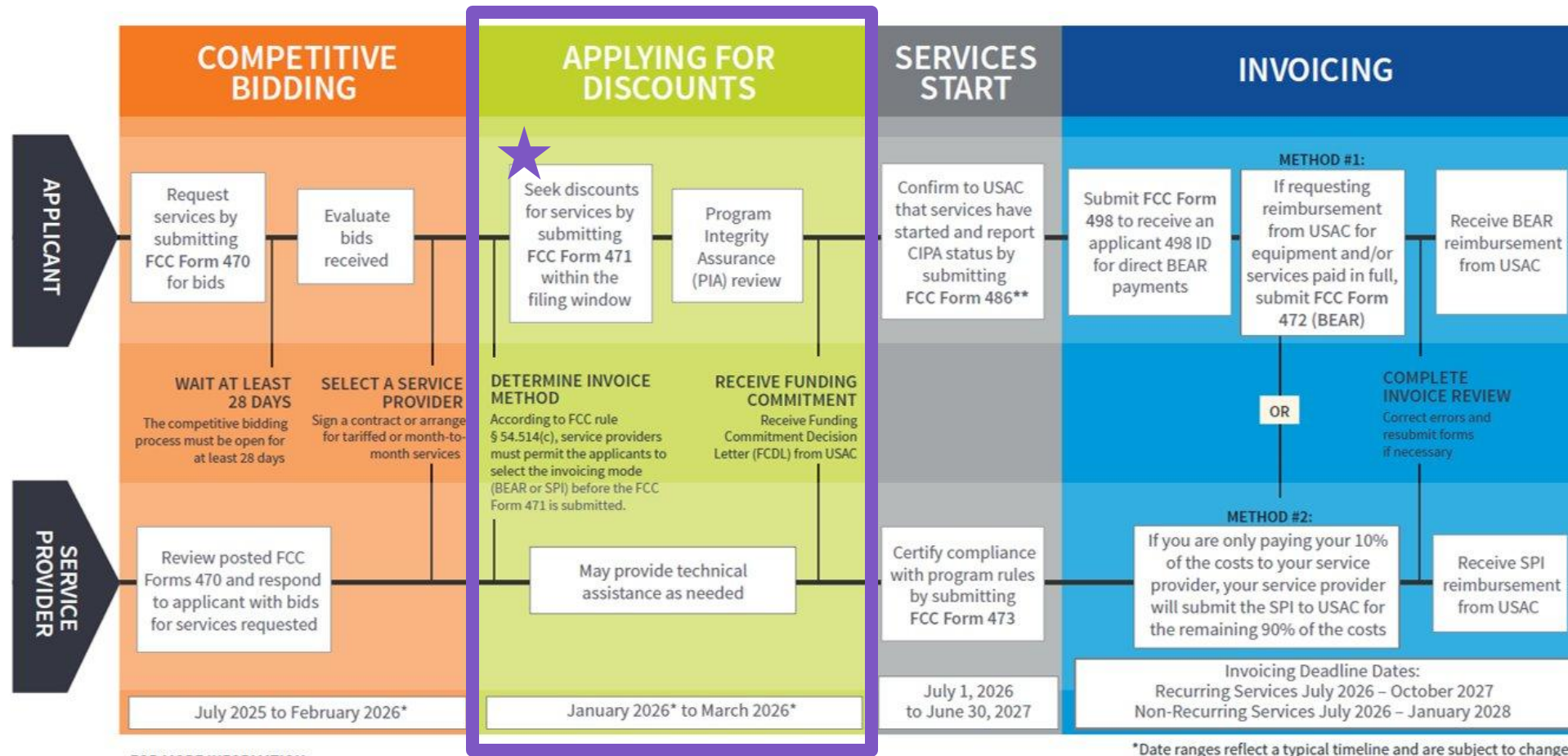
- **Review all the requirements**, including the FCC Form 470 and any RFP(s).
- Provide a responsive bid to what was requested by the applicant.
- Ask questions if the information provided by the applicant is unclear.
- Separate the eligible, mixed bucket, and **ineligible services** in your bid response.
- **Do not offer gifts, free services, devices, or non-E-Rate discounts** to make your response more attractive.
- **Do not offer to help** an applicant if you are also planning to respond to their bid request.

Lowest Corresponding Price (LCP)

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

What is the FCC Form 471?

What is the FCC Form 471?



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.

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).


Your FCC Form 470 and FCC Form 471 Must Match

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

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. C1 and 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 2399059243 would be number 2399059243.001. 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, and recipients of service (ROS).

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 FAQs

- **What is the specific equipment or service, and which category does it fall under?**
 - C1: Data Transmission and/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.
- **Is this a contracted or month-to-month service? Are there 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.
- **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.
- **Are the start date or end date of services different?**
 - If either are different, different FRNs must be created.

Common FCC Form 471 Application Errors

- **Not correctly classifying the category of service or equipment/service type on the Form 470**
 - Determine the equipment/services you need and contact the CSC to verify correct classification of equipment and services.
 - Competitively bid for all necessary equipment and service types by filing an accurate Form 470 that accurately describes the equipment and service(s).
- **Filing an inaccurate Funding Request Number (FRN) with the wrong equipment or service type**
 - Work with your service provider to ensure that equipment and services are accurately represented on the FCC Form 471.
 - Contact the CSC or your Program Integrity Assurance reviewer with any questions.
- **Failing to remove ineligible services and equipment**
 - Work with your service provider to determine whether your requested equipment and services is 100% eligible.
 - Remove any ineligible amounts when creating your FRNs(s).

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.

How to File FCC Form 471

- After you have selected a service provider and made sure that your profile contains the most accurate data, gather information you will need to file your FCC Form 471 (see [FCC Form 471 Checklist](#))
- File FCC Form 471 through the E-Rate Productivity Center
- For more information on the FCC Form 471 application process, see [FCC Form 471 Videos](#) on USAC's website.

**Apply for
Discounts
471**

FY2026 Dates

January 2026

To

March 2026

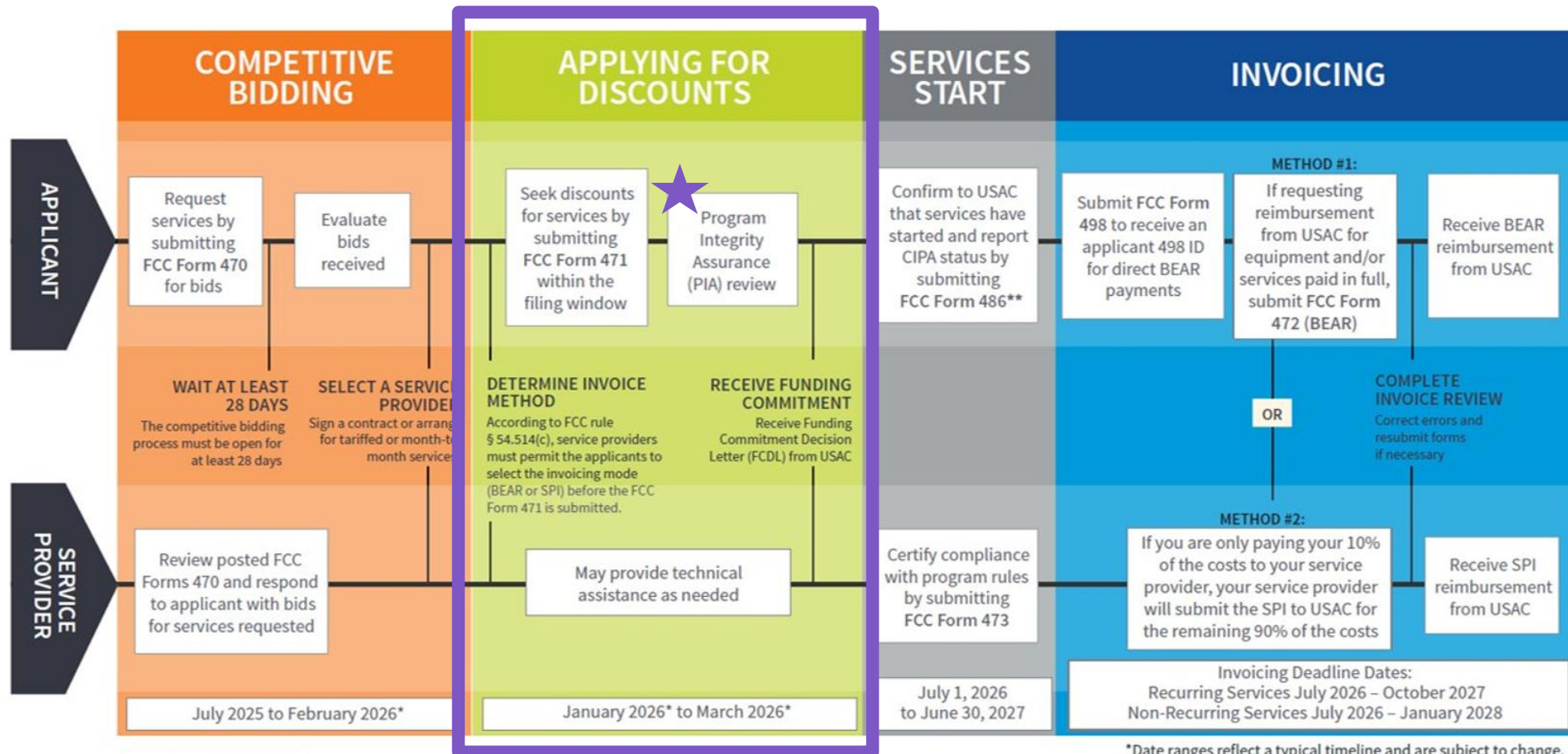
“Out of Window” Applications

- In FY2024, if you had certified your FCC Form 470 after **February 27, 2024**, you would still have needed to wait 28 days before certifying FCC Form 471.
- You would not have been able to certify your FCC Form 471 before the filing window closed on March 27.
- In this situation, file and certify the FCC Form 471 **as soon as** you have waited 28 days and selected the most cost-effective service offerings. You will then need to file a waiver request with the FCC. Basic instructions for filing the FCC Window Waiver Requests are on the [FCC Form 471 Filing](#) page.

Application Review

Program Integrity Assurance (PIA) Review

After applicants certify an FCC Form 471 within the filing window, PIA reviewers check the information on the form for completeness and accuracy.



Before Your PIA Review – Review Your FCC Form 471

- After certifying your FCC Form 471, and while you are waiting for your program integrity assurance review, there are some areas you should double-check for accuracy.
- If you find any information that should be corrected or updated, you can submit a [Receipt Acknowledgment Letter \(RAL\) Modification Request](#).
- If you are using a new or existing contract on your FCC Form 471, you must have a contract record uploaded to your EPC profile.
 - To create that record, go to your organization page and click **Contracts**, then **Manage Contracts** and **Add a New Contract**.

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 10 years** after the last day of service delivery or end of the funding year, whichever date is later.
 - 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.
- Keep all records such as:
 - RFP 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

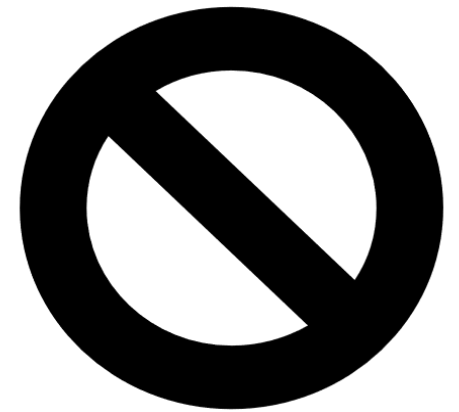
As we focus on preventing fraud, waste, and abuse, it is **extremely important** to take document retention seriously, ensure compliance with program rules, and avoid the appearance of fraudulent activity.

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 assistance](#).

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.



Funding Commitments

Funding Commitment Decision Letter

- After the program integrity assurance review process has been completed, USAC issues a Funding Commitment Decision Letter (FCDL) containing USAC's decisions on your funding requests.
- You can find this decision in the Newsfeed in your organization's EPC account.
- You should review this decision carefully, as it contains important information both for planning to start services and for completing the additional steps in the application process.
- If you disagree with one or more of the decisions in your FCDL, you can [appeal](#) to USAC.

Resources: Competitive Bidding

- [Competitive Bidding Page](#)
- [Competitive Bidding Infographic](#)
- [Competitive Bidding FAQs](#)
- [28-Day Waiting Period Page](#)
- [How to File an FCC Form 470 eLM](#)
- [Guiding Statements Video](#)
- [Guiding Statements Reference Table](#)
- [Applicant Process Page](#)
- [Service Provider Process Page](#)
- [Document Retention](#)



Resources: FCC Form 471

- [FCC Form 471 Filing page](#)
- [FCC Form 471 eLM](#)
- [FCC Form 471 Download Tool](#)
- [FCC Form 471 Submission Checklist](#)

Additional Resources Continued

Visit the [Learn section of the E-Rate website](#) to find useful information


- [Subscribe](#) to the E-Rate News Brief
 - Upcoming Date reminders
 - Program announcements
- [Webinars](#)
 - Watch past webinars and register for upcoming trainings
- [eLearning Modules \(eLMs\)](#)
 - Learn how to navigate various aspects of the E-Rate program
- [Review Frequently Asked Questions \(FAQs\)](#)

Live Q&A

Submit your questions
about today's topics:

- Competitive Bidding
- Requesting Bids
- File and Certify an FCC Form 470
- Open and Fair Process
- 28-Day Waiting Period
- Select a Service Provider
- The Service Provider's Role

Questions



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

Your question will be sent to staff

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

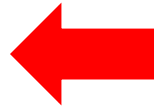


Create a customer service case in the E-Rate Productivity Center (EPC):

1. Log in to EPC.
2. Select the **Contact Us** link from the upper right menu on the landing page.

E-Rate Fall Training Series 2025

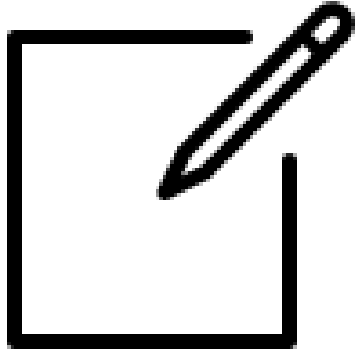
- ✓ E-Rate Program Overview - September 18
- ✓ Pre-Commitment - September 25
- ❑ **Category Two Budgets** - October 9
- ❑ EPC Admin Window - October 16
- ❑ Post-Commitment - October 23
- ❑ Invoicing - October 30
- ❑ Eligible Services - November 6



The screenshot shows the USAC website's E-Rate section. 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 of the webinars, a 'Sign up' link for the E-Rate News Brief, and a section for 'Upcoming Trainings'. A sidebar on the left lists various resources: Learn, Videos, Webinars (selected), 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.

Take Our Survey



- 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, one will be emailed to you within one to two business days.
- We appreciate your feedback!

Thank You!





Universal Service
Administrative Co.