E-Rate Program Overview

Applicant and Service Provider Training

September 10, 2026

Universal Service
Administrative Co.

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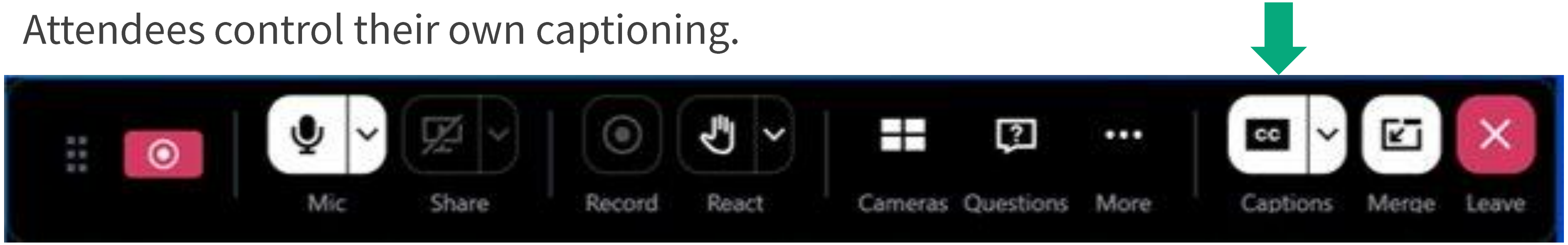

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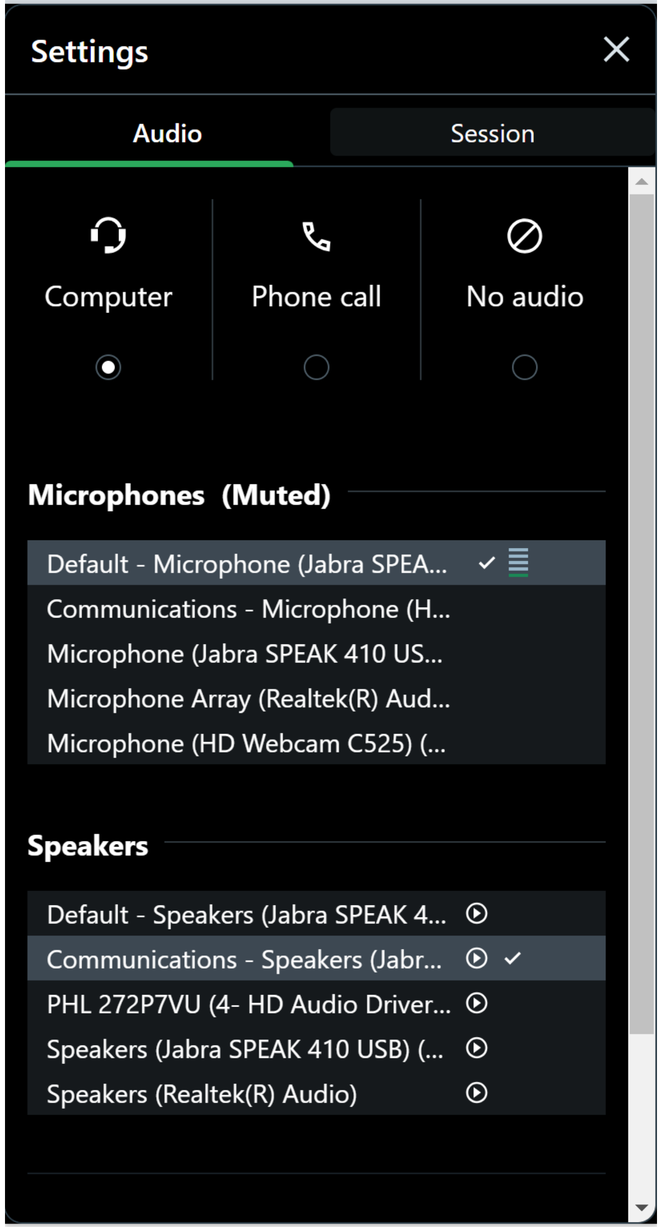

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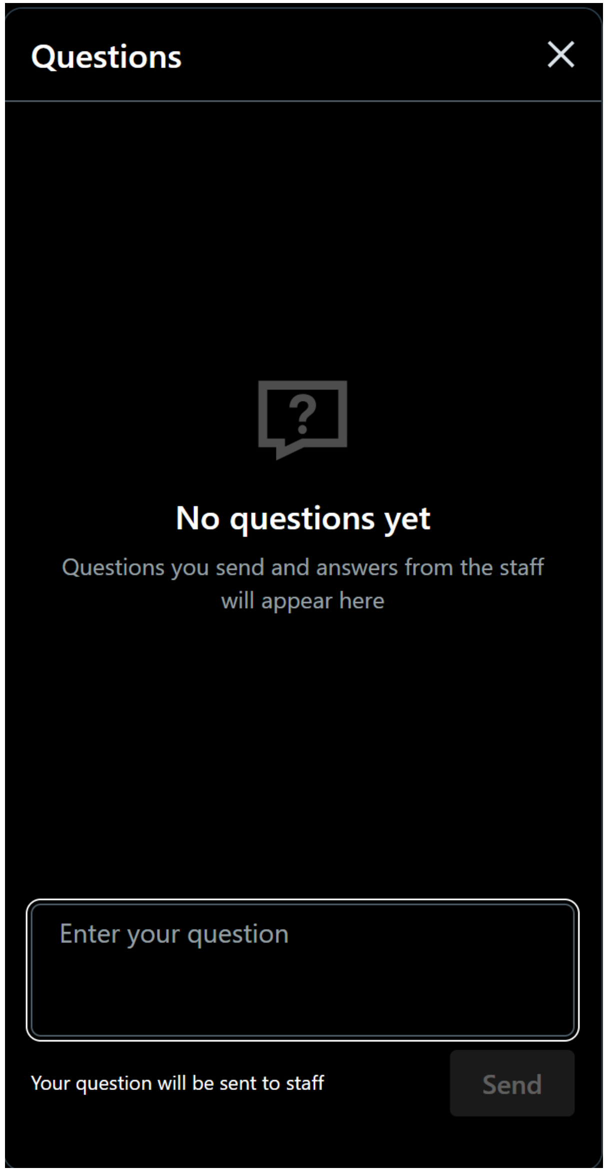

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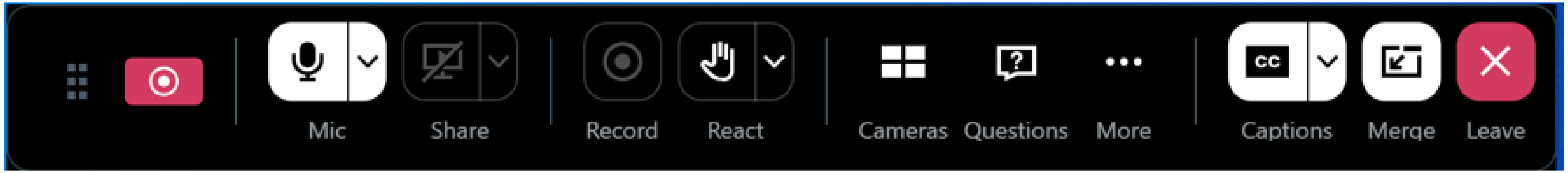

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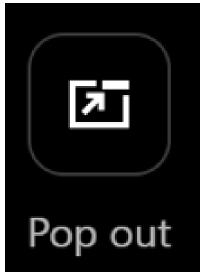

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E-Rate Customer Service Center (CSC)

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 Our Team

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Agenda

- USAC Overview
- E-Rate Program Overview
- Program Updates & Reminders
- Entity Eligibility
- Eligible Services Overview
- E-Rate Application Process Overview
- Resources
- Questions

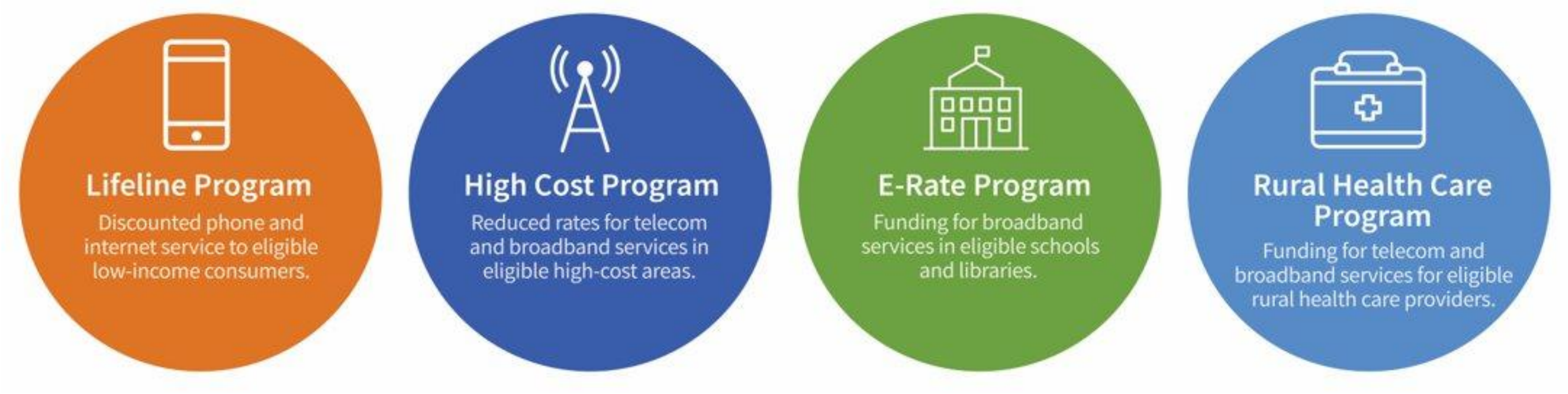
Universal Service Administrative Company

Overview

Who We Are: The Universal Service Administrative Company

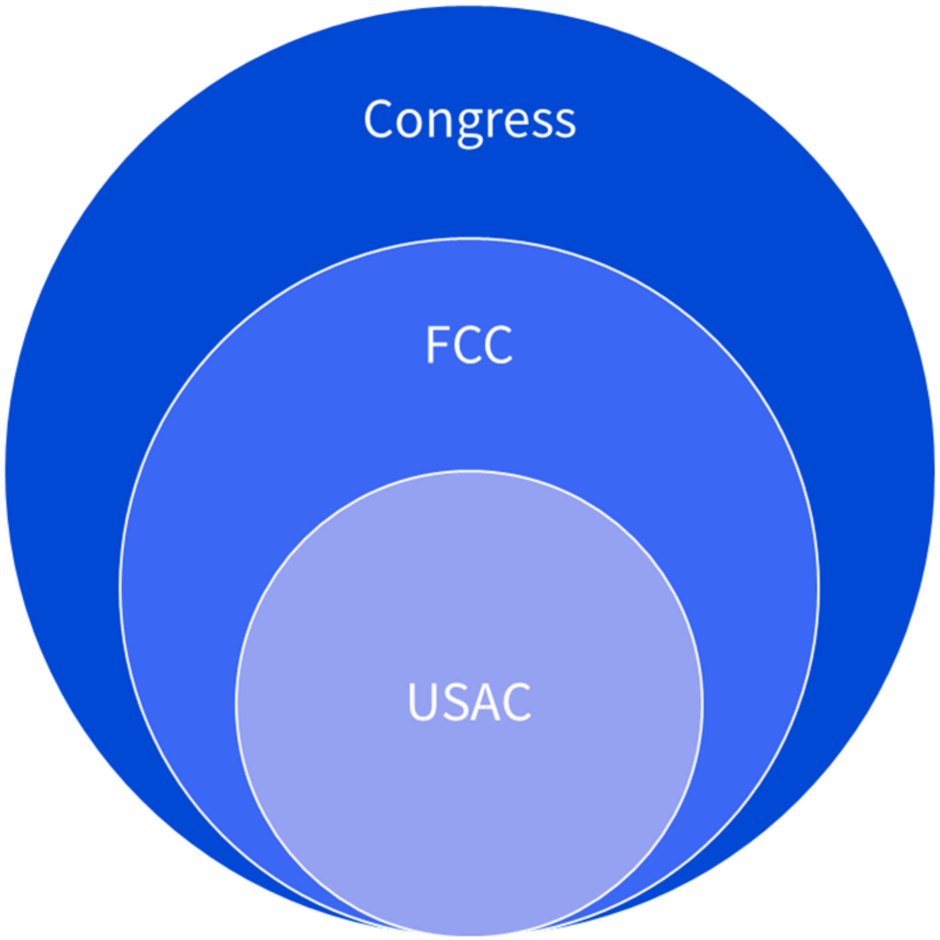
The Universal Service Administrative Company (USAC) is an independent, not-for-profit organization designated by the Federal Communications Commission (FCC) as the permanent administrator of the USF and its four programs.

- **The Universal Service Fund (USF):** Exists to ensure that all people in the United States have access to quality, affordable connectivity service.



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.

FY2026 Program Cap **$5.2B**

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).

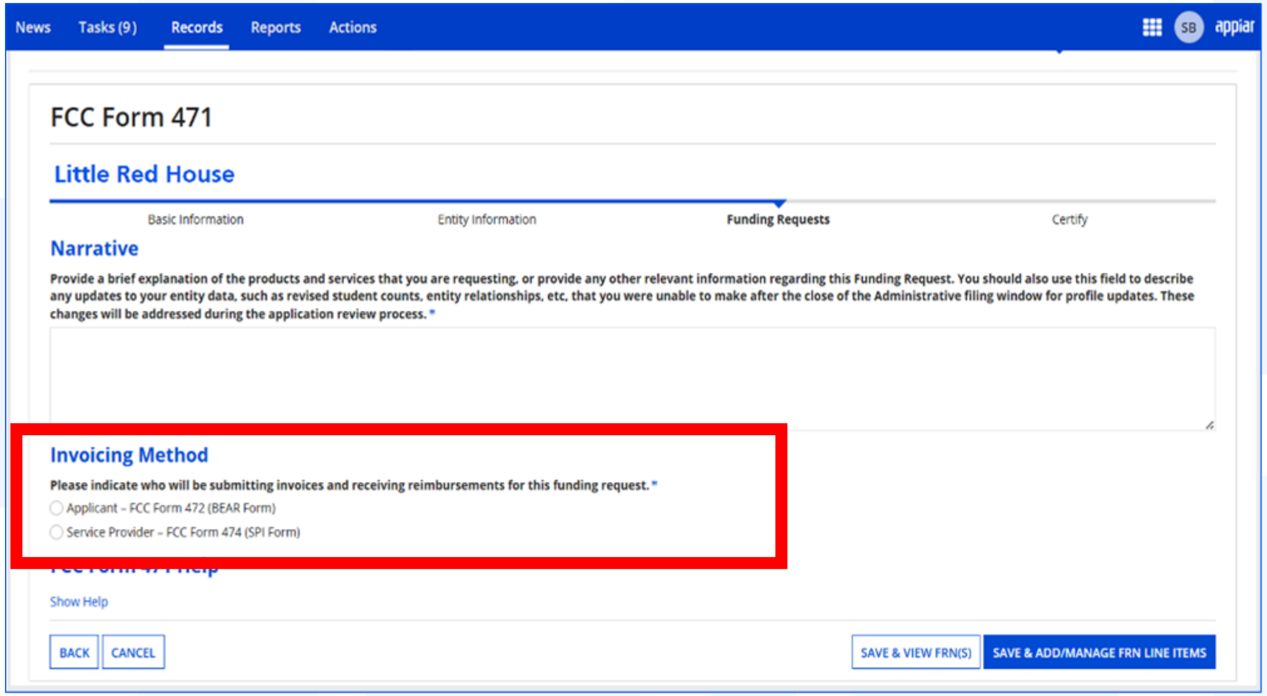
Top C1 Purchases:
- Leased lit fiber
- Internet access provided over fiber or copper
- Commercially available internet access
- Cable provider internet
- Satellite internet

Top C2 Purchases:
- Internal Connections (IC): Cabling, routers, switches, modems, wireless access points, right to use licenses
- Basic Maintenance of Internal Connections (BMIC): Repair and upkeep of eligible IC
- Managed Internal Broadband Services (MIBS): Managed Wi-Fi agreements

FY2026 & FY2027
Program Updates and Reminders

How to Select Your FY2026 Invoicing Method

- New BEAR/SPI Selection Added to FY2026 E-Rate FCC Form 471 Application.
- Below the Narrative textbox
- If you are copying an FRN from a previous funding year that does not have the invoicing method assigned, you will be prompted to select one.
- Applicants should notify their service providers of the invoicing method early in the process of preparing the funding requests.



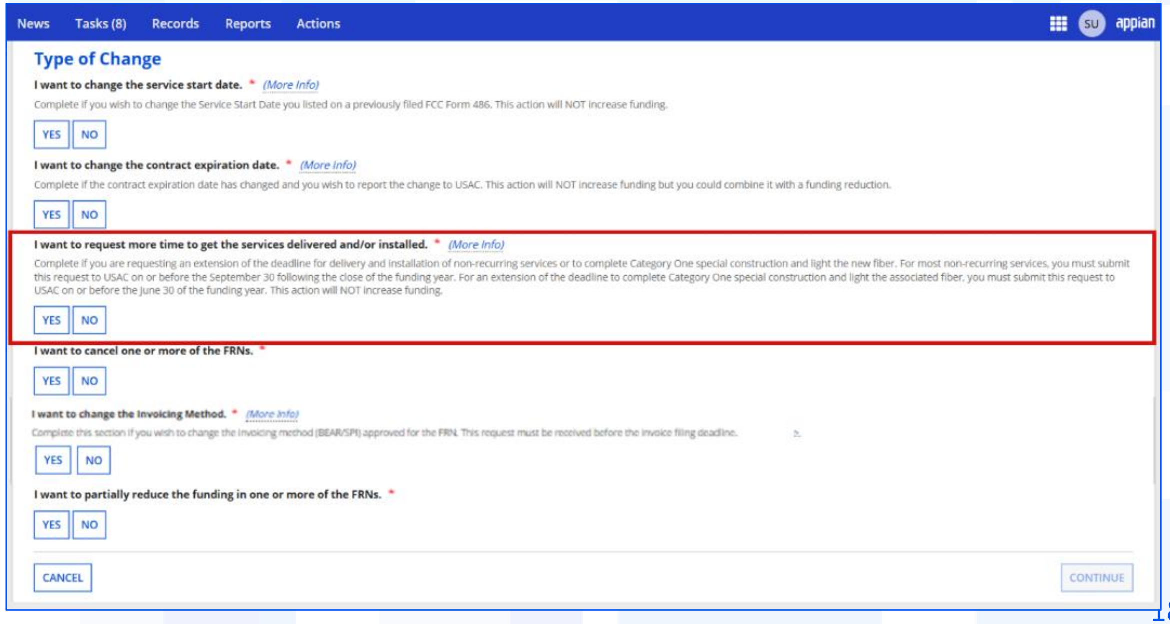
How to Modify Your FY2026 Invoicing Method

Before receiving a funding commitment decision letter (FCDL):

- Submit a RAL Modification Request during the review of your FCC Form 471 application.

After receiving an FCDL:

- Submit an FCC Form 500 using the new "Invoicing Method" change request.
- This change request must be submitted before any invoice is submitted for the FRN.



FCC Order 26-30

On April 30th 2026, the FCC released order 26-30 establishing:

- Additional invoice deadline flexibility.
- Changes to cost allocation.
- 2028 will see the implementation of:
  - Competitive Bidding Portal
  - FCC Form 486 CIPA confirmation moving to FCC Form 471

Competitive Bidding Portal

Beginning in funding year (FY) 2028, USAC will manage a Competitive Bidding Portal where:

- Applicants will upload bid evaluations and vendor selection documentation, including contract(s), after selecting service providers.
- The portal be used for competitive bidding communications, with exceptions based on local/state law requirements.
- The portal serve as a document repository for applicants and service providers, which will reduce recordkeeping burdens.
- Stakeholders will have the opportunity to provide feedback during the testing phase.
- E-Rate will update users via our News Brief as we are informed of changes.

Sunsetting FCC Form 486

- Funding Year 2028 will phase out the standalone filing requirement for FCC Form 486.
- Required CIPA compliance certifications will be integrated upstream into the FCC Form 471 application process.
- Applicants must continue to meet standard Form 486 deadlines (120 days from the service start date or the Funding Commitment Decision Letter date, whichever is later) until the transition applies fully to future applicable funding cycles.

Invoicing Changes

Applicants and service providers can now:

- Request a single 120-day extension of the original invoice filing deadline if the request is made within 15 days of the original invoice filing deadline.
  - Instructions to make this request can be found here.
- Have a one-time, 60-day grace period to resubmit corrected versions of invoices that were timely filed before the invoice deadline date but rejected or modified by USAC after the invoicing deadline.
  - The 60-day period to resubmit a corrected invoice starts the day after you get a USAC decision denying or reducing your payment.
- For cost allocations, the FCC clarified that the ancillary use presumption explained in FCC 23-56 applies to all Category One (C1) services including data transmission services, wide area network services, ethernet, etc.

FY2026 SAM.gov and FCC Form 498 Changes

- On September 8, 2026 USAC started using SAM.gov banking information to pay invoices.
- Service providers and BEAR invoicing method (FCC Form 472) participants must have:
  - An active SAM.gov account with a valid bank account associated
  - A Unique Entity Identifier (UEI) on their FCC Form 498
- Invoices can be submitted but will not be disbursed until these requirements are met.
- Because the SAM.gov registration process can take up to six weeks, USAC recommends starting **as soon as possible**.
  - For more information, visit USAC's SAM.gov and UEI Requirement webpage and How to File an FCC Form 498 for Applicants.

Transition of Services Changes

- E-Rate will create a process for applicants that are transitioning services to file a post-commitment request that changes.
  - Service start date
  - Service end date
- The applicant must meet certain criteria.
- This process will require form changes and will go into effect in a future funding year after approval from the Office of Management and Budget (OMB).

Transition of Services Changes: Increasing Post-Commitment Funding

E-Rate may approve a post-commitment increase if the applicant:

- Filed partial funding year requests for funding from both service providers
  - (or service offerings, in the case of a transition to a different service from the same service provider)
- Indicated the following on the FCC Form 471
  - best estimates of the transition dates indicated
  - the requests were for a transition of service
  - if there are available funds below the E-Rate program funding cap

Entity Eligibility

Eligible Service List

C1 and C2 Services

Types of Eligible Services

Eligible Entities

FCC FY2026 ESL BMIC Update

The FCC's Wireline Competition Bureau (WCB) released the FY2026 eligible services list (ESL) Order (DA 25-1069) on December 17, 2025.

- Treat all currently eligible software- or remote-based services, including bug fixes, security patches, software-based technical assistance, and configuration changes the same and have applicants request all software- and remote-based services with the internal connections equipment that they support.
- The Order permits applicants that had sought funding for software-based BMIC services on a prorated basis in prior funding years to request discounts on the remainder of the contract in FY2026 or continue requesting pro-rated support.
- It also clarifies that applicants that seek support for software- or remote-based services as internal connections in FY2026 that were competitively bid as BMIC services are not violating the competitive bidding rules.

FCC FY2026 ESL BMIC Update Cont.

- **Amending the entries for “Eligible Broadband Internal Connections”** to include software-or remote-based services, including bug fixes, security patches, software-based technical assistance, and configuration changes.
- **Amending the bullets listed under “Basic Maintenance of Eligible Broadband Internal Connections”** to limit configuration changes to those performed in person and deletes “Basic technical support including online and telephone-based technical support” and “Software upgrades and patches including bug fixes and security patches.”
- **Amending the language in “eligibility limitations for basic maintenance”** to delete language related to bug fixes, security patches, and technical support.
- Applicants would request all software-based and remote-based services with the internal connections equipment that they support.

Eligible Services List (ESL) FY2027

- The Eligible Services List (ESL) for each funding year provides guidance on the eligibility of products and services under the E-Rate program.
- Please monitor the FCC website for any updates on the FY 2027 ESL.
- Updates will also be included in the E-Rate News Brief.
- Prior funding year Eligible Services Lists can be found here.

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 software needed for the operation 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 (IC)
  - 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 become 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.
  - **Tribal Colleges and University (TCU)** libraries can apply for E-Rate support if 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. Cost allocation is required only in instances where broadband support is requested for a portion of the network serving the TCU.
  - 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 percent to 90 percent discount rate for C2 (services and equipment providing connections 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.
- As of FY24, E-Rate eligible **Category Two** services used for essential shared equipment located at a NIF is allowed for NIFs to use as long as the most cost-effective solution is chosen. The NIF's usage of the shared equipment is no longer required to be cost-allocated in these instances.

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 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 Billed Entity Number (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

New Schools and Libraries: Create an EPC Account

- The E-Rate Productivity Center (EPC) allows school districts or library systems to file E-Rate program forms, receive aries, consortia, and statewide [illegible] notifications, and conduct other program activities. Independent schools and non
-
    - Commission Registration System (CORES).
    - Obtain a Billed Entity Number (BEN) by calling E-Rate's Customer Service Center (CSC) at (888) 203-8100.
        - Refer to the CSC documentation guide for a list of the information that is required to create a BEN.
- After requesting a BEN, you (as the user on the BEN's entity profile) will receive an email directing you to set an EPC password, accept the platform's terms and conditions, and configure multi-factor authentication. Once you have accepted EPC's terms and conditions, you will appear as a valid user on the BEN's EPC profile.
- You should then contact the CSC to request that you be designated as the (sole) Account Administrator for their entity.

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

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 C2 Budget recalculation.

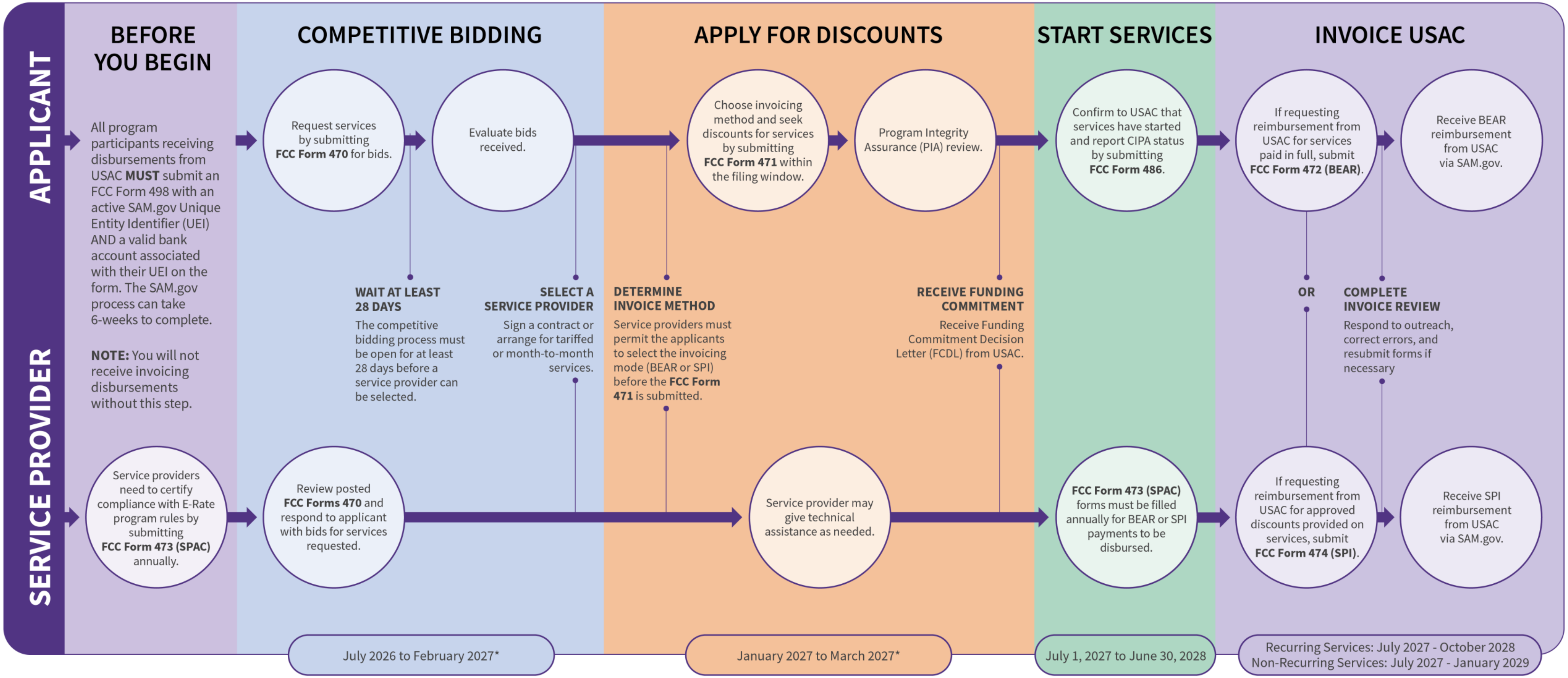
- **Existing EPC User Accounts** – The EPC Administrative Window is closed. You will not be able to make changes to your EPC profile when the administrative window is closed. If you need to modify some information in an entity profile when the profiles are locked, contact the CSC for further guidance.

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.

Application Cycle Overview

The E-Rate FY2027 Application Process

To start the E-Rate Application Process, you MUST have access to the E-Rate Productivity Center (EPC) to submit forms. If you need assistance, reach out to the E-Rate Customer Service Center at (888) 203-8100.



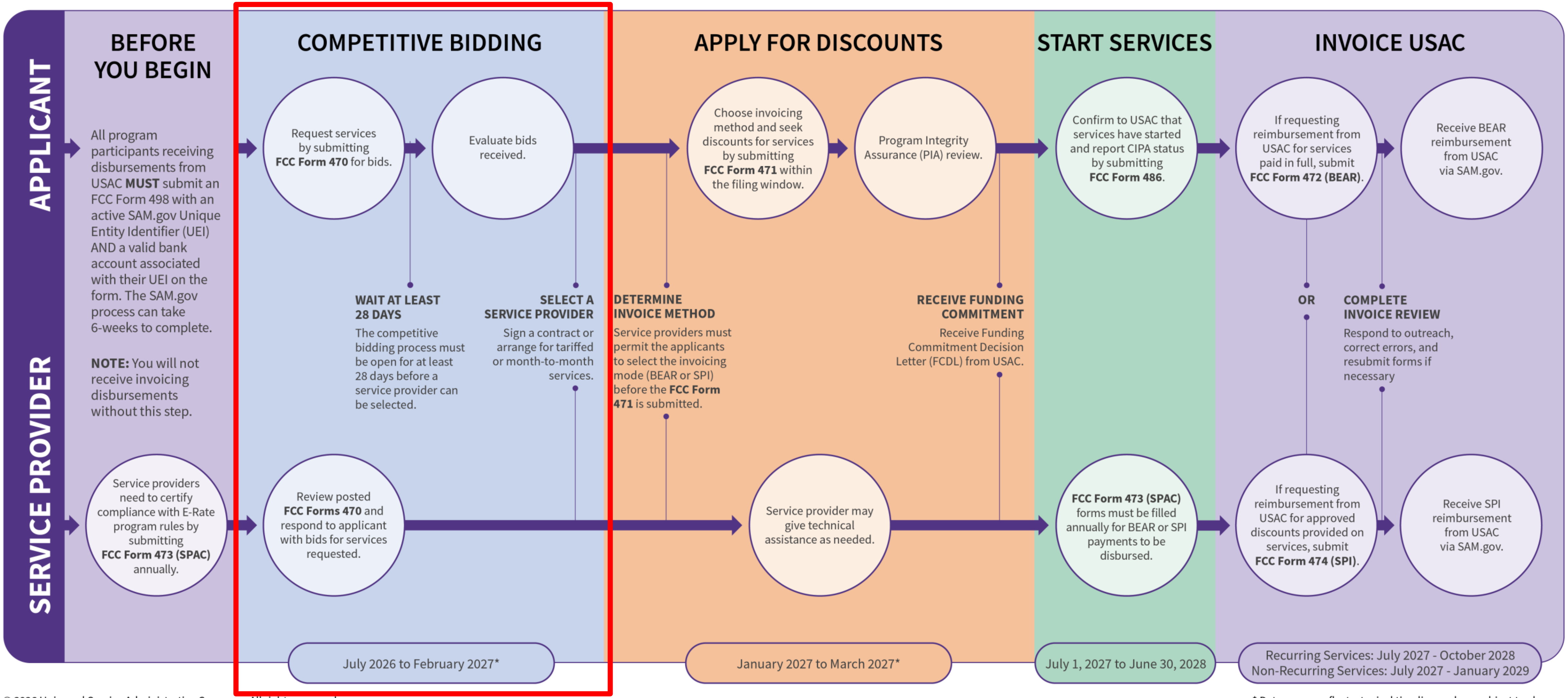
* Date ranges reflect a typical timeline and are subject to change.

Competitive Bidding Overview

FCC Form 470

What is the FCC Form 470?

To start the E-Rate Application Process, you MUST have access to the E-Rate Productivity Center (EPC) to submit forms. If you need assistance, reach out to the E-Rate Customer Service Center at (888) 203-8100.



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

https://www.usac.org/about/sam-gov-uei-requirement/

Applicant Forms and Important Dates Reminder

Competitive Bidding

FY2025:
July 2024 – February 26, 2025

FY2026:
July 2025 – March 4, 2026

FY2027:
July 2026 – February 2027*

470

Apply for Discounts

FY2025:
January 15, 2025 – March 26, 2025

FY2026:
January 2026 – April 1, 2026

FY2027:
January 2027 – March 27, 2027

471

Start Services

FY2025:
July 1, 2025 – June 30, 2026

FY2026:
July 1, 2026 – June 30, 2027

FY2027:
July 1, 2027 – June 30, 2028

486

Invoice USAC

Recurring Services
FY2025: July 2025 – October 2026
FY2026: July 2026 – October 2027
FY2027: July 2027 – October 2028

Non-recurring Services
FY2025: July 2025 – January 2027
FY2026: July 2026 – January 2028
FY2027: July 2027 – January 2029

472 (BEAR)
OR
474 (SPI)

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

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.

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 necessary 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.

Publication Date: 8/19/2024

Available for Public Use

Link to Competitive Bidding Infographic:
https://www.usac.org/wp-content/uploads/e-rate/documents/resources/Competitive-Bidding-Infographic.pdf

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 recompete the contract.
- Competitive Bidding Exemptions:
  - Category One: Low-Cost High-Speed Internet Access
  - Category Two: Low Cost Internal Connections (Libraries only)

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.

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.

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.

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.

What's New for FY2027 and Upcoming in FY2028

- **FY2027 Updates to the FCC Form 470**
  - Updated guiding language on the Category Two service selection screen
  - Ineligible service selection items have been removed (Bus Wi-Fi and Hotspots)
  - Additional manufacturer options are available
  - "Or equivalent" language is now a part of selecting "other"
- **FY2028 Bidding Portal**
  - "Beginning in funding year (FY) 2028, service providers will be required to respond to applicants' FCC Form 470 requests for services by submitting their bids into a Universal Service Administrative Company (USAC)-managed bidding portal, and applicants will be required to upload all bid evaluation and vendor selection documents, including contracts, to the portal after they select their service providers." FCC-26-30

Selecting Service Providers

Evaluating Bids

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.

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.*

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.
- If you have any question on these issues, please Contact Us.

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.

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 1/1/2026, the waiting period starts on 1/1/2026, and your Allowable Contract Date is 1/29/2026. 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.*

Universal Service Administrative Co.

Available for Public Use

Allowable Contract Date (ACD) Infographic

CALENDAR

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	**Certified FCC Form 470** 1 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** 29 Day 29	30	1	2

•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]

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.

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

https://www.usac.org/e-rate/applicant-process/competitive-bidding/28-day-waiting-period/

Contracts

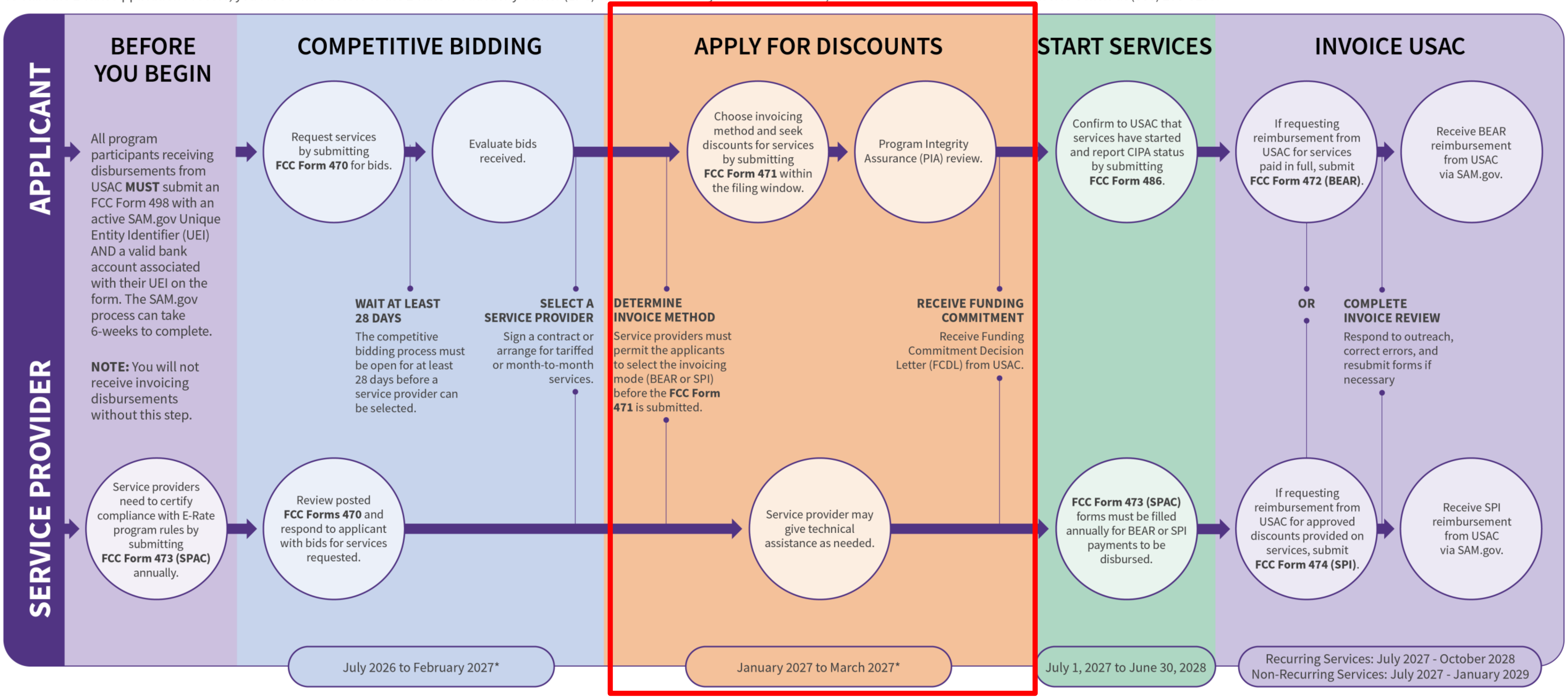
- Applicants must have a signed contract or other legally binding agreement in place and loaded in EPC **prior to submitting their FCC Forms 471 to USAC**.
- Applicant must not sign a contract before the Allowable Contract Date (ACD), which is 28 days after the FCC Form 470 is filed or the RFP is posted, 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)

Applying for Discounts

Discounts are calculated and reported to USAC on FCC Form 471

What is the FCC Form 471?

To start the E-Rate Application Process, you MUST have access to the E-Rate Productivity Center (EPC) to submit forms. If you need assistance, reach out to the E-Rate Customer Service Center at (888) 203-8100.



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

https://www.usac.org/about/sam-gov-uei-requirement/

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.

Select How to Invoice on FCC Form 471

- Applicants select their invoice method (FCC Form 472 (BEAR) or 474 (SPI)) for each FRN when submitting their FCC Form 471.
- Applicants are encouraged to discuss their selection(s) with their service provider(s) before the application is submitted, but it is the **applicant's choice** prior to submission of the FCC Form 471 (47 CFR § 54.514(c))
- Mode Changes are made through the RAL process when submitted after completing their FCC Form 471 and before the FCDL is issued. Future EPC changes will be rolled out to allow applicants to change the invoicing mode through the FCC Form 500.
- FCC Form 471 eLearningModule (eLM) & User Guide

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

Funding Commitment Decision Letter 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 and 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.

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 and 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 taking over during the applicable funding year will supply planned cutover dates.
  - 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, 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 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.

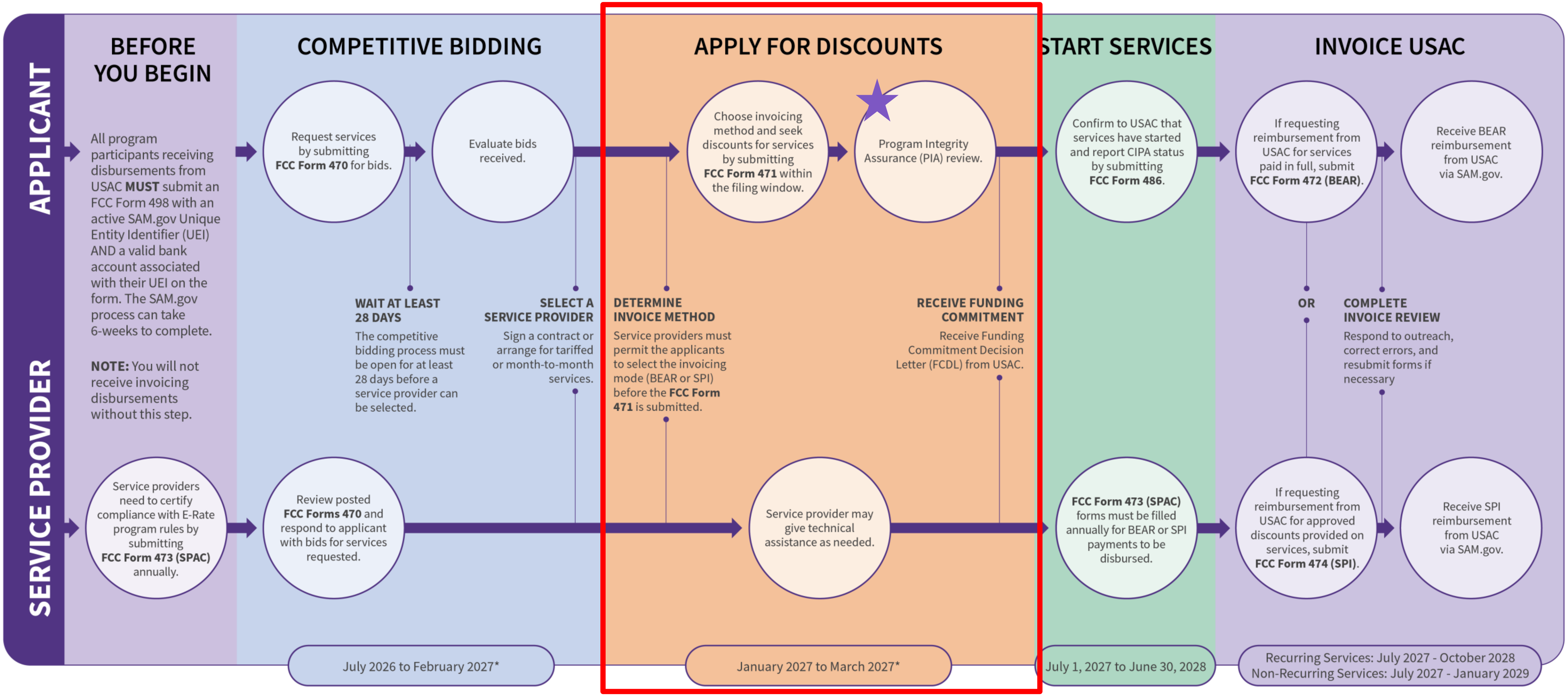
Transitioning Services: Filing SPIN and/or Service Substitution

- **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

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.



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

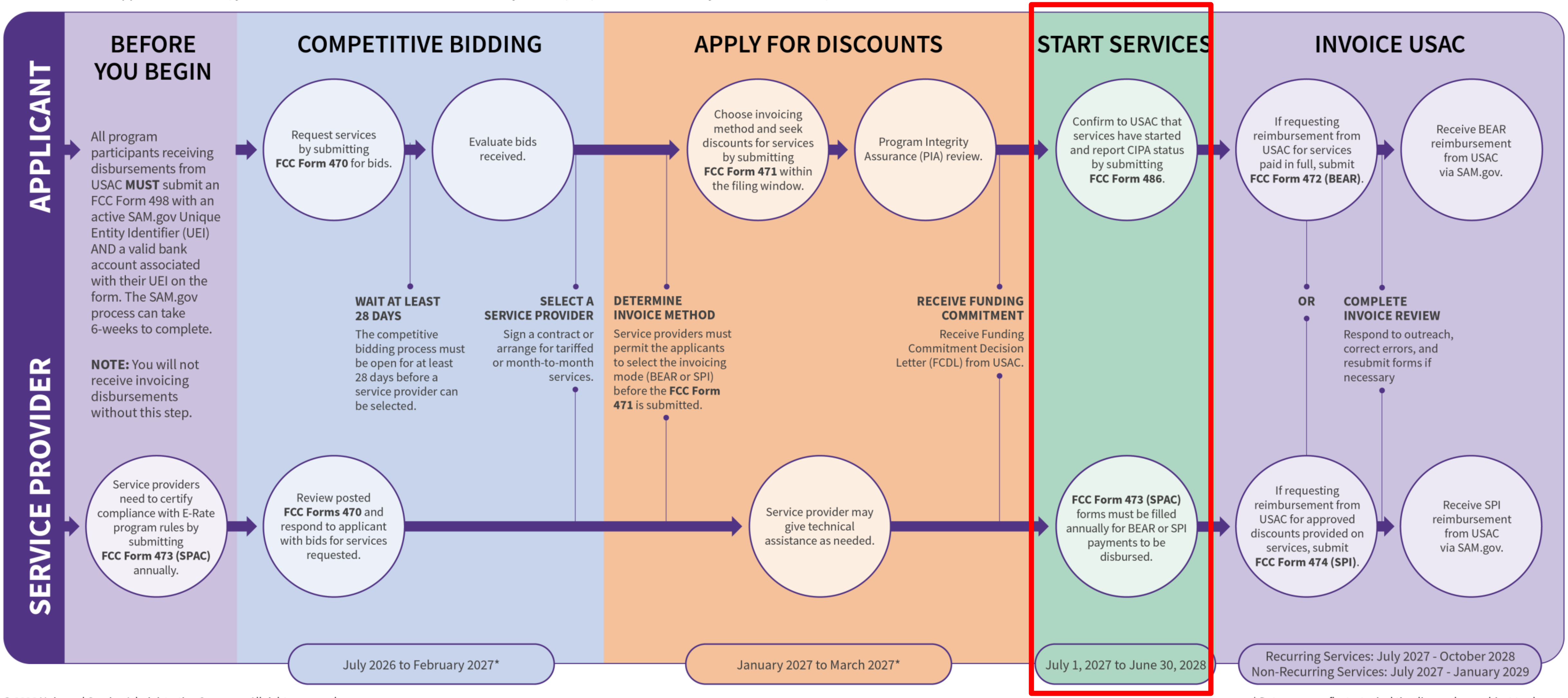
Before Your PIA Review – Review Your FCC Form 471

- 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**.

Starting Services

What is the FCC Form 486/473?

To start the E-Rate Application Process, you MUST have access to the E-Rate Productivity Center (EPC) to submit forms. If you need assistance, reach out to the E-Rate Customer Service Center at (888) 203-8100.



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

https://www.usac.org/about/sam-gov-uei-requirement/

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 FCDL.
- Late submission of the FCC Form 486 can impact your commitment.
- Verify your Children's Internet Protection Act (CIPA) compliance.
- The standalone filing requirement for FCC Form 486 will be phased out Funding Year 2028, and the required CIPA compliance certifications will be integrated into the FCC Form 471. Applicants must continue to meet standard Form 486 deadlines until the transition is complete.

486

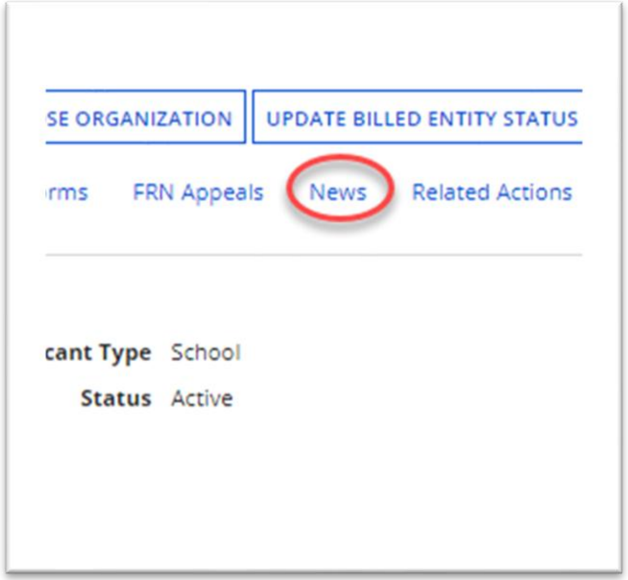
July 1, 2026,
to
June 30, 2027

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)

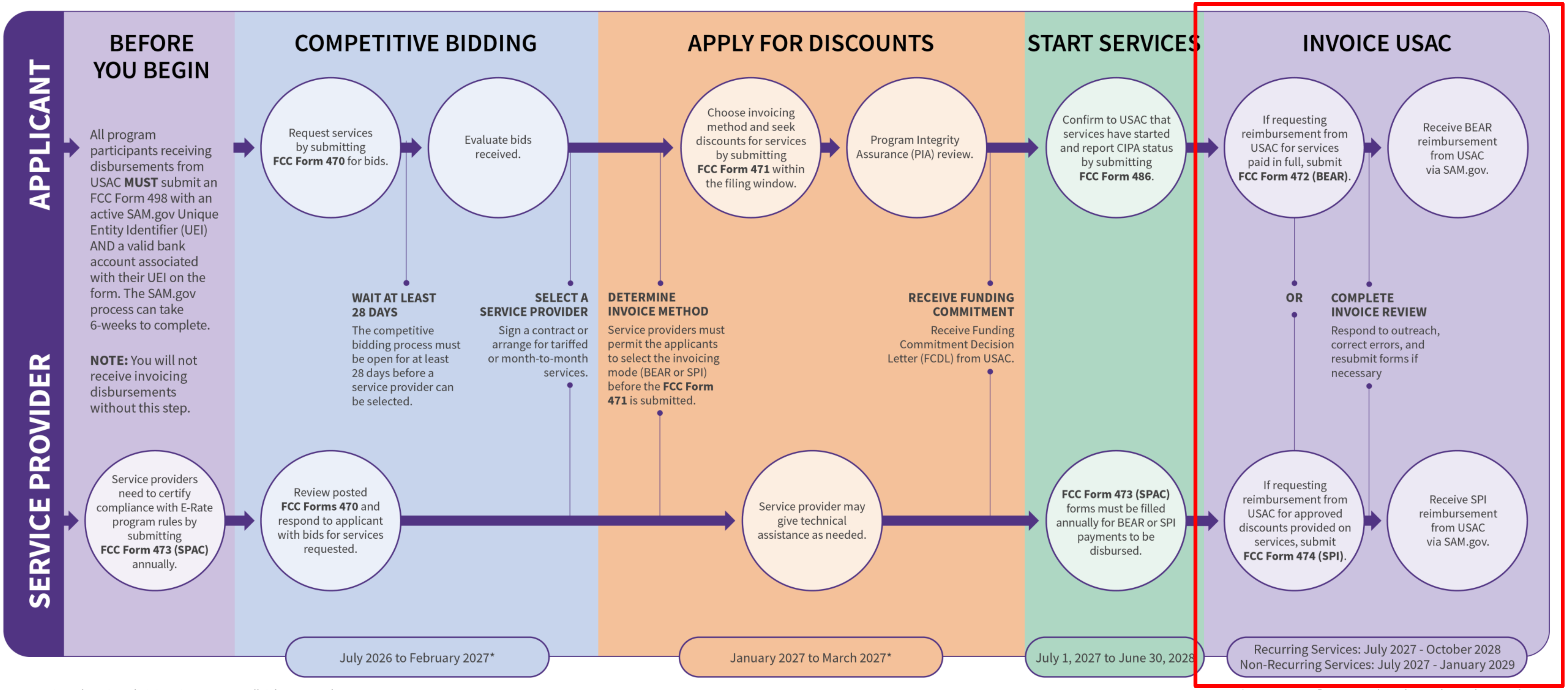
FCC Form 473

- 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.

Invoicing Overview

What is the FCC Form 472/474?

To start the E-Rate Application Process, you MUST have access to the E-Rate Productivity Center (EPC) to submit forms. If you need assistance, reach out to the E-Rate Customer Service Center at (888) 203-8100.



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

https://www.usac.org/about/sam-gov-uei-requirement/

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 much not exceed contracted rates and USAC will only pay up the committed and contracted rates.

472
(BEAR)

OR

474
(SPI)

Two Methods of E-Rate Invoicing

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

BEAR Method

In the **BEAR (Billed Entity Applicant Reimbursement)** method, the applicant invoices USAC directly.

Before invoicing USAC for the discounted portion of the bill, applicant must have:

- Ensured that the Service Provider's SPAC was filed
- Filed an FCC Form 498 and obtained a 498 ID/SPIN
- Paid the service provider in full for approved eligible equipment and service costs
- Filed FCC Form 486 to certify service start and CIPA compliance

The service provider must have:

- Filed an FCC Form 473

Invoice path starts with applicants' FCC Form 471 [but can be changed].

Service providers **MUST** file a SPAC for disbursements to occur. Applicants should verify a SPAC has been filed.

Applicant → Invoice via BEAR → Applicant files the FCC Form 472

Service Provider → Invoice via SPI → Service provider files the FCC Form 474

All equipment and/or services must be delivered and installed before the service delivery deadline.

[Invoice Deadline Date]

SPI Method

In the **SPI (Service Provider Invoicing)** method, the service provider invoices USAC.

Before invoicing USAC for the discounted portion of the bill, the service provider must have:

- Filed an FCC Form 498 and obtained a 498 ID/SPIN Certified an FCC Form 473
- Filed a Service Provider Annual Certification Form (SPAC)/FCC Form 473
- Billed the applicant for thenon-discounted portion of approved eligible equipmentand service costs

The applicant must have:

- Filed an FCC Form 486 to certify service start and CIPA compliance

Universal Service Administrative Co.

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 request an invoice deadline extension before or up to 15 days after the original invoice filing deadline
- 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.

472
(BEAR)

OR

474
(SPI)

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.
- Because of changes made in FCC 26-30, invoice filers have a one-time, 60-day grace period to resubmit corrected versions of invoices that were timely filed before the invoice filing deadline but rejected by USAC after the invoicing 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

- Contract Expiration date (CED) versus Invoice Deadline Date (IDD)
  - CED – USAC will not pay for services delivered outside of the contract expiration end date. For example, if the CED is 3/1/2025 and the funding year spans from 7/1/2024 - 6/30/2025, we can only pay until the contract expiration date of 3/1.
  - Incorrect CED can be fixed via an FCC Form 500.
  - IDD is the last day to submit an invoice to USAC for an approved FRN.

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.
    - Note: Once the changes in FCC 26-30 are made effective, a timely-filed invoice that is rejected near the IDD will also extend the IDD by 60 days and permit refiling, if appropriate.
    - If it is rejected a second time, 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.

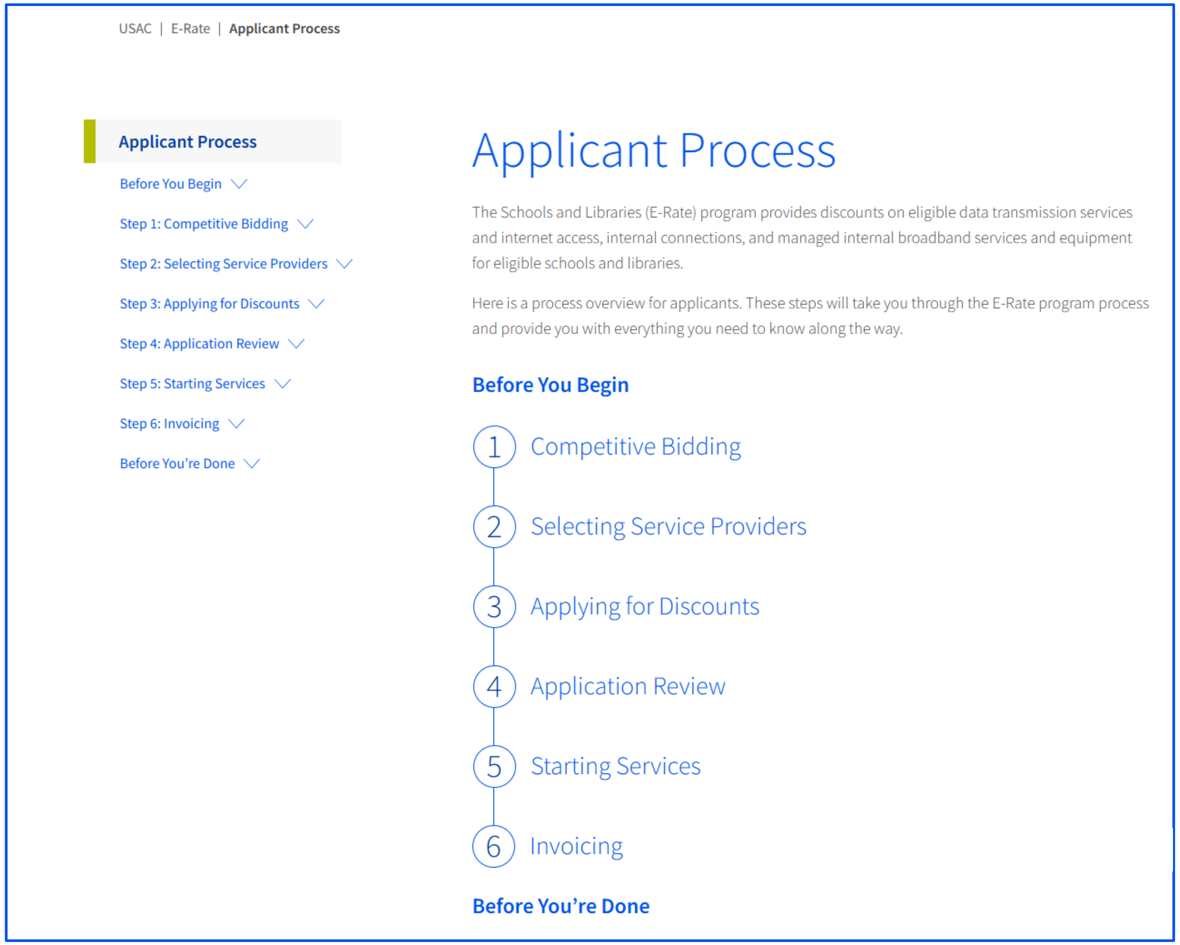
E-Rate Tools and Resources

E-Rate Tools and Resources: 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.
- Program Training and Overview Material
- **Interactive User Guides and eLMs for Form Filings and Commitments**
  - Pre- and Post-Commitment Processes: Admin Window, FCC Forms 470, 471, 472, and 473/474, FCC Form 498, FCC Form 486 and CIPA Video.
- EPC Invoicing for Service Providers Videos & eLMs
- Open Data Platform Videos
- Accessible on the USAC E-Rate Videos webpage and each respective form's webpage.

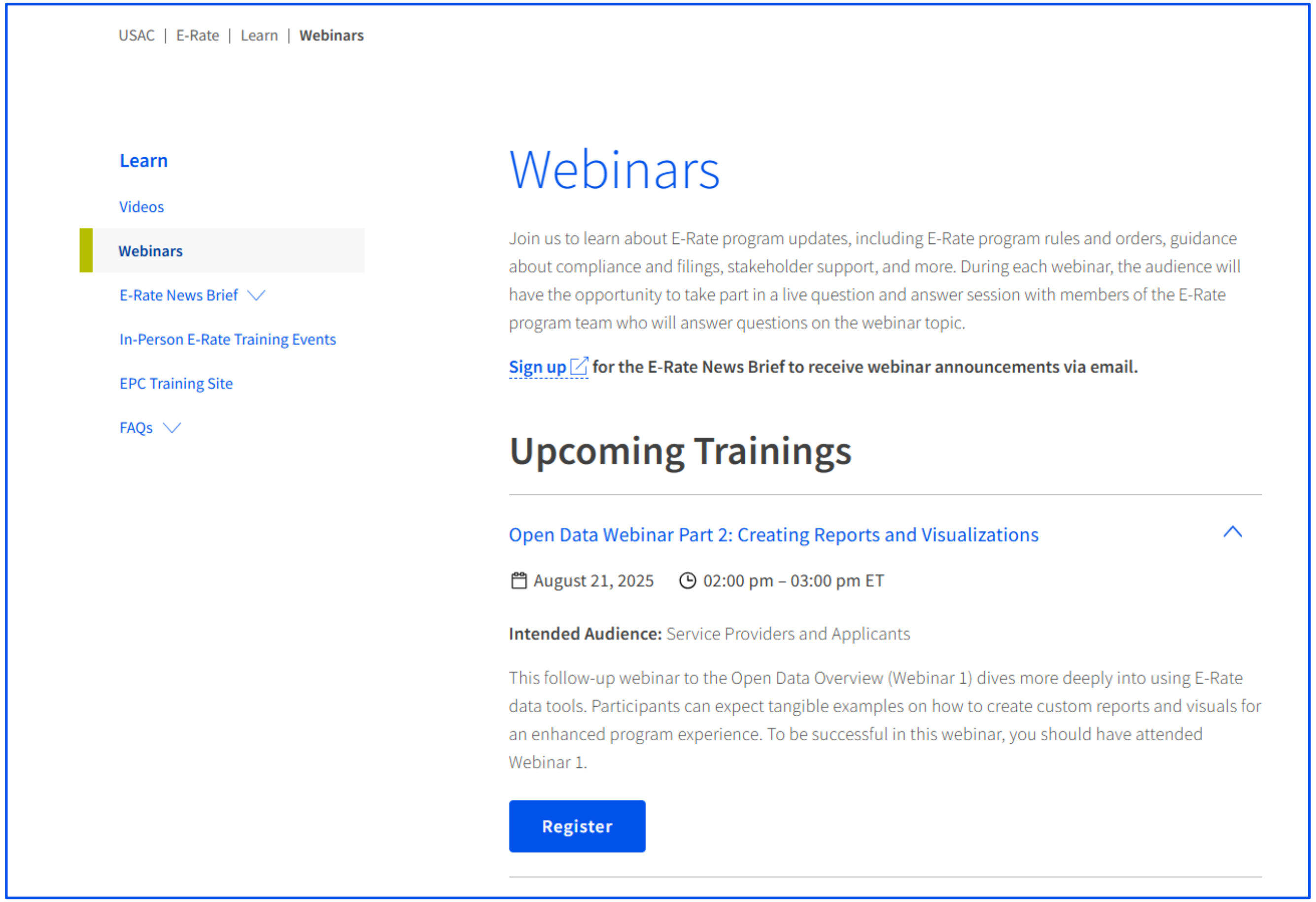
E-Rate Tools and Resources: Website

- 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.



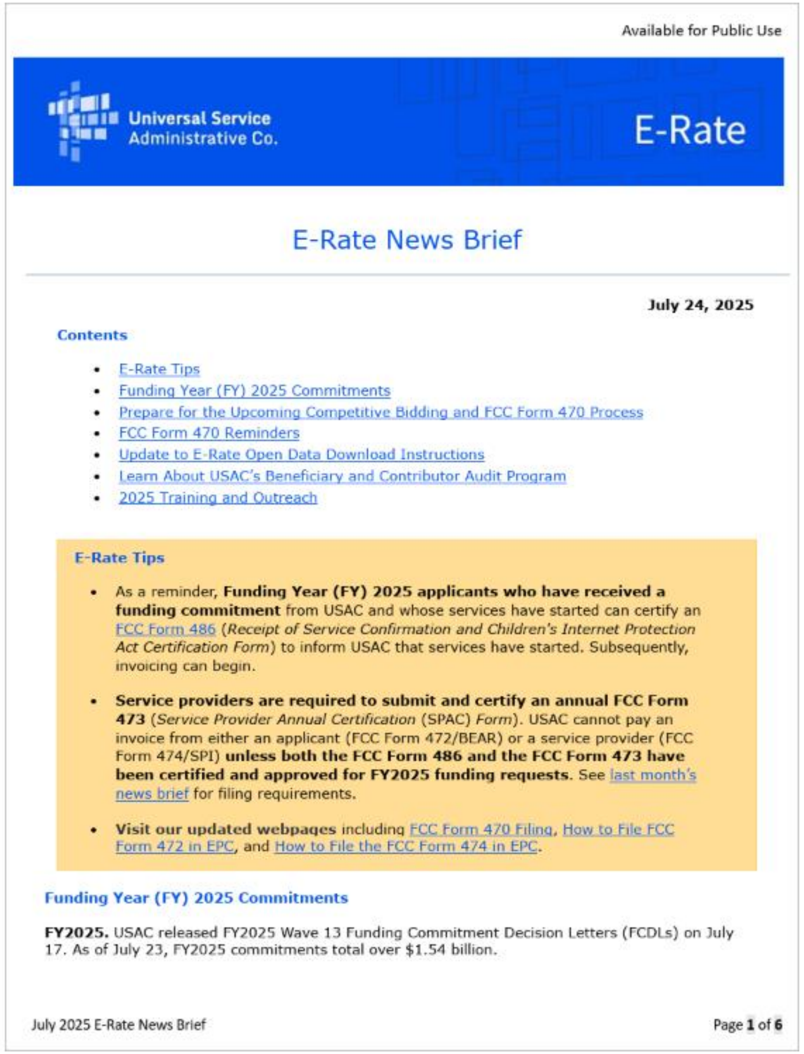
E-Rate Tools and Resources: Webinars

- 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.



E-Rate Tools and Resources: News Brief

- Provides reminders, updates, tips and tricks.
- Sent monthly via email.
- Subscribe here.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Universal Service Administrative Co.

E-Rate

E-Rate News Brief

July 24, 2025

Contents

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.

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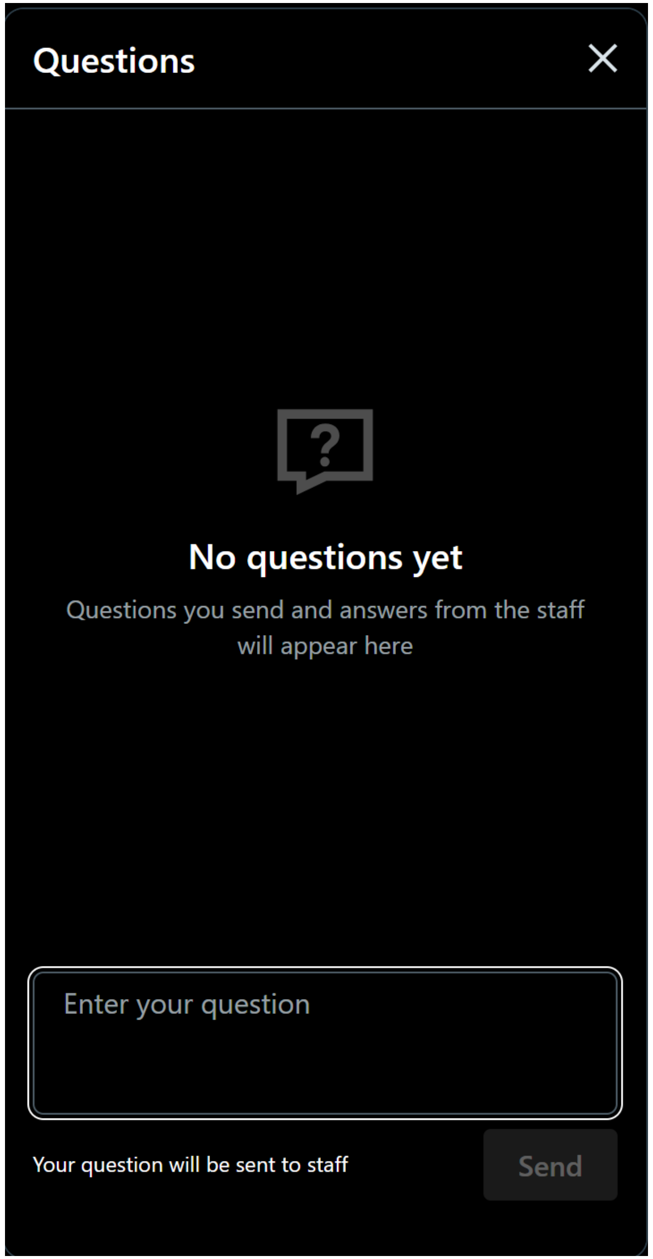
Live Q&A

Submit your questions **about today's topics**:

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



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)

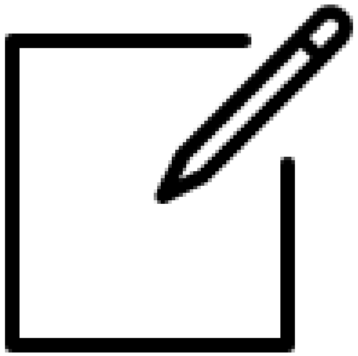
Call us at (888) 203-8100

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.

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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