Telecom Program Request for Services Best Practices

Submitting the FCC Form 465

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Housekeeping

- Use the "Audio" section of your control panel to select an audio source and connect to sound

  - Turn on your computer's speakers, or

  - Use the call-in instructions in your confirmation email

- All participants are on mute

- Submit questions at any time using the "Questions" box

- Slides attached to GoToWebinar Panel and posted to [RHC Learn](#)
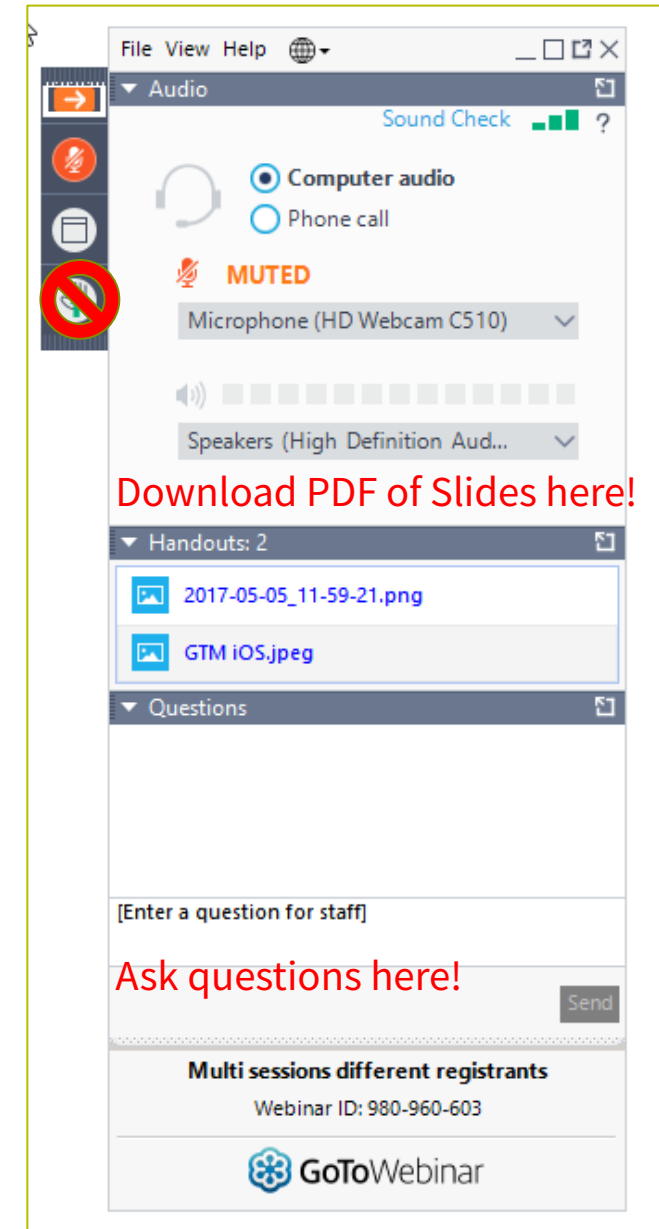
Meet Our Team

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Agenda

- Overview

- Competitive Bidding
  - Evaluation Criteria
  - Competitive Bidding Exemptions
  - Requests for Proposal

- Search Posted Services

- Submitting the FCC Form 465

- Best Practices and Resources

By the end of this webinar you will be able to…

- Complete and submit an FCC Form 465 in My Portal
  - Create bid evaluation criteria
  - Understand competitive bidding requirements
  - Identify applicable competitive bidding exemptions

- Locate current requests for services and other important resources on the USAC website
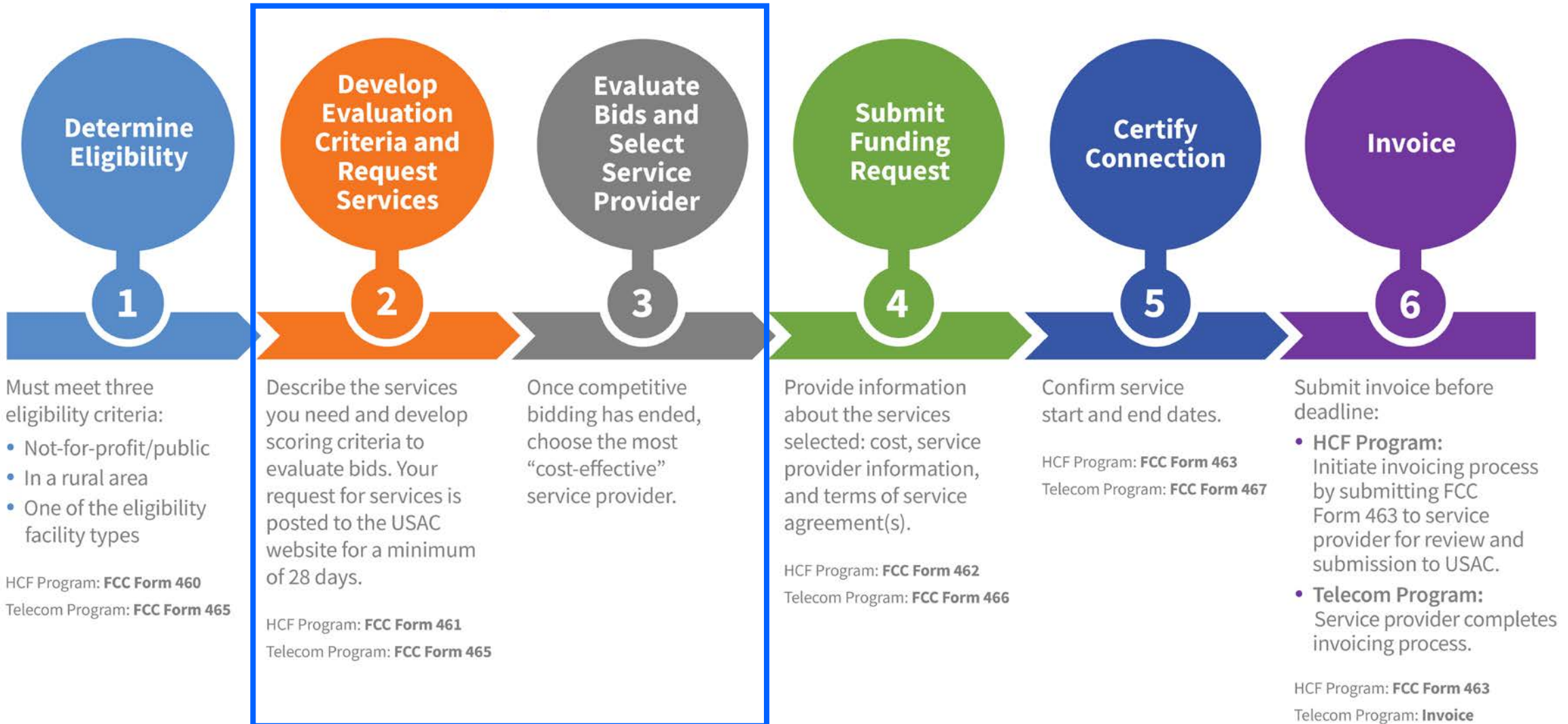
Glossary

Acronym	Meaning
FCC	Federal Communications Commission
HCP	Health Care Provider (your site)
HCP Number	Number associated with your site
PAH	Primary Account Holder
ACSD	Allowable Contract Selection Date

Overview

Request for Services Best Practices

RHC Program Application Process

1. Determine Eligibility

Must meet three eligibility criteria:
- Not-for-profit/public
- In a rural area
- One of the eligibility facility types

HCF Program: **FCC Form 460**
Telecom Program: **FCC Form 465**

2. Develop Evaluation Criteria and Request Services

Describe the services you need and develop scoring criteria to evaluate bids. Your request for services is posted to the USAC website for a minimum of 28 days.

HCF Program: **FCC Form 461**
Telecom Program: **FCC Form 465**

3. Evaluate Bids and Select Service Provider

Once competitive bidding has ended, choose the most "cost-effective" service provider.

4. Submit Funding Request

Provide information about the services selected: cost, service provider information, and terms of service agreement(s).

HCF Program: **FCC Form 462**
Telecom Program: **FCC Form 466**

5. Certify Connection

Confirm service start and end dates.

HCF Program: **FCC Form 463**
Telecom Program: **FCC Form 467**

6. Invoice

Submit invoice before deadline:
- **HCF Program:** Initiate invoicing process by submitting FCC Form 463 to service provider for review and submission to USAC.
- **Telecom Program:** Service provider completes invoicing process.

HCF Program: **FCC Form 463**
Telecom Program: **Invoice**

What is a Request for Services?

- You (the HCP) will complete the **FCC Form 465** to let service providers know what types of telecommunications services you are looking for.

- Service providers use the information on the FCC Form(s) 465 to create a bid to provide those services.

- Telecommunications (Telecom) program FCC Form 465 is the "Description of Services Requested and Certification Form".

- The FCC Form 465 acts as both eligibility determination and request for services.

What is a Request for Services?

- The HCP and service provider may not enter into an agreement to purchase services until 28 days after the Request for Services is posted.

  - The 28-day competitive bidding process begins the next full business day after the FCC Form 465 is publicly posted.

  - After the 28 day period is complete, the HCP and service provider are welcome to sign a contract, this day is called the **Allowable Contract Selection Date (ACSD)**.

Rural Health Care Program: **Funding Year 2022**

FY2022: JULY 1, 2022-JUNE 30, 2023

JULY 1, 2021: First Day to Submit Request for Services Forms
- **FCC Form 461** HCF Program
- **FCC Form 465** Telecom Program
- Request for services must be posted to USAC's website by March 2

DEC 1, 2021 - APRIL 1, 2022: Funding Request Filing Window Period
- **FCC Form 462** HCF Program
- **FCC Form 466** Telecom Program

OCT 28, 2023: Invoicing Deadline
- **FCC Form 463** HCF Program
- **Telecom Invoice**

Questions?

Competitive Bidding

FY2022 Request for Services Best Practices

Competitive Bidding

- The purpose of competitive bidding is to allow all service providers an equal opportunity to understand your service requirements and offer the most cost-effective solution to address those needs.

- RHC program rules and FCC Orders require that the competitive bidding process be "fair and open."

Competitive Bidding

- Service providers who plan to bid cannot also assist with the preparation of the FCC Form 465, choose a winning bidder, or participate in the vendor selection process in any way.

- All potential bidders and service providers must have access to the same information about the service needs and must be treated in the same manner.

- All applicants and service providers must comply with any applicable state, Tribal, or local procurement laws.

Bid Evaluation Criteria

- The bid evaluation criteria is a list of weighted standards included in your Request for Services that you will use to determine the most cost-effective bid.

- Applicants must have "minimum requirements" for each criterion.

- Each criterion is given a certain weight, and the sum of these weights must equal 100.

- The bid evaluation criteria should address your needs as indicated on the FCC Form 465 and be based on the FCC's definition of "cost-effective." (*47 CFR 54.622(c)).*

Example of Evaluation Criteria

Bid Evaluation

Select criteria (and weights assigned to each) that will be used to evaluate bids received as a result of this request for services.

Criteria	Description (if 'Other')	Minimum Requirement	Weight (%)
Cost			50%
One vendor solution			30%
Technical Support		Must have single point of contact	20%

What is a Competitive Bidding Exemption?

- In some cases, the service needs or contract conditions allow you to be exempt from competitive bidding.

- With a competitive bidding exemption, you will not have to undergo the competitive bidding process, and do not need to create evaluation criteria or collect bids from service providers.

- A competitive bidding exemption will allow you to skip the FCC Form 465 (for the purposes of competitive bidding) entirely and proceed directly to submitting a funding request.

Competitive Bidding Exemptions

- You must meet one of the following criteria to be exempt from submitting the FCC Form 465 and participating in the competitive bidding process:

    - Purchasing services or equipment from a master service agreement (MSA) negotiated by a federal, state, Tribal, or local governmental entity on behalf of you and others, and which was awarded pursuant to applicable competitive bidding requirements;

    - Requesting support using contracts previously endorsed by USAC (MSA under the Pilot program or the HCF program);

    - Have an active multi-year contract designated as "evergreen" for the RHC program (exemption applies for the life of the contract);

    - Using a consortium contract negotiated and approved under the Schools and Libraries (E-rate) program.

- If you do not meet any of the exemptions you must competitively bid for services and submit the FCC Form 465.

Evergreen Contracts

- You are not required to file an FCC Form 465 or competitively bid for the life of a multi-year contract designated as evergreen under the HCF or Telecom programs.

- Your contract may be designated as "evergreen" if the contract meets all of the following requirements:
  - Both parties are identified
  - Contract specifies the service type, bandwidth, and quantity
  - Contract is signed and dated by the HCP or consortium leader after the Allowable Contract Selection Date (ACSD)
  - Contract specifies the term and cost of service(s)
  - Contract includes the physical addresses of the HCP(s) purchasing from the contract
- USAC must have designated the contract evergreen **prior** to submission of the funding request.

Service Substitutions (47 CFR 54.624)

- Service substitutions allow you to reallocate un-invoiced committed funds to substitute the services or modify the services.

- Substitutions allow the flexibility for an HCP with an approved funding commitment to spend all of the committed funds, even though USAC-supported services may change over the course of the commitment.

- You may request a service substitution if:

  - The substitution is provided for in the contract, within the change clause, or constitutes a minor modification;

  - The site is an eligible health care provider and the service is an eligible service under the Telecommunications program or the Healthcare Connect Fund program;

  - The substitution does not violate any contract provision or state, Tribal, or local procurement laws; and

  - **The requested change is within the scope of the controlling Request for Services, including any applicable RFP used in the competitive bidding process**.

- Applicants with month-to-month approved funding commitments may not utilize service substitutions as they did not apply with a contract.

- Service substitutions must be submitted by the service delivery deadline.

- Please use the information on the Site and Service Substitutions webpage as a resource.

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Requests for Proposal

- A request for proposal (RFP) is a comprehensive bidding solicitation that describes your business priorities and functional requirements in sufficient detail to ensure an effective and fair and open competitive bidding process.
    - You are required to submit an RFP if it is required under applicable State, Tribal, or local procurement rules or regulations

- If you plan to issue an RFP, it must be submitted with the FCC Form 465, and include at a minimum:
    - A description of the service needs and a defined scope of the project;
    - The number of days during which bids will be accepted (28 day minimum);
    - Clearly delineated deliverables; and
    - The bid evaluation criteria, including the weight assigned to each criterion.

- The RFP should align with everything entered into the FCC Form 465 and provide more details.

Service Providers and Competitive Bidding

- Service providers are prohibited from preparing, signing, or submitting an applicant's FCC Form 465 or any other competitive bidding documents.

- Service providers are prohibited from being involved in developing the bid evaluation criteria, or participating in the vendor selection process in any way.

- If it is determined that a service provider helped an HCP with its request for services and was subsequently chosen to provide services, the HCP will have committed a competitive bidding violation, and the funding request will be denied or any funding payments will be subject to rescission.

Calculating Rural Rates

On April 8, 2021, the FCC released [Order DA 21-394](#), waiving the requirement that health care providers and service providers participating in the Telecom program use the Rates Database to calculate urban and rural rates for funding years 2021 and 2022.

- Instead of using the Rates Database, HCPs and their service providers should continue to use rates approved under [Method 1, 2, or 3](#) to calculate rural rates.

- HCPs and service providers must use the most recently-approved rural rate for FY2018, FY2019, or FY2020 for the same service to the same facility or, if there is no approved rate, an approved rural rate for the same or similar services to a facility with the same or similar geographic characteristics.

  - **NOTE:** For all previously approved urban and rural rates, you **must** provide USAC with the previous FRN associated with that approved rate and submit **all** documentation associated with that rate.

- HCPs will enter this rural rate on **Line 33** (rural rate per month per service agreement) of the FCC Form 466 and upload supporting documentation, for example, a Funding Commitment Letter or rates approval letter for FY2018, FY2019, or FY2020.

- Documentation provided must show that the rural rate provided is in compliance with the rural rate rule (47 CFR 54.607 (2018)).

Supply Chain Order

As a reminder, when service providers log in to My Portal they will see two new supply chain certifications included in the FCC Form 463 and Telecom program invoice.

The first certification affirms compliance with the Section 54.9 prohibition on USF support to purchase, obtain, maintain, improve, modify, operate, manage, or otherwise support equipment or services produced or provided by the covered companies deemed to pose a national security threat to the integrity of the communications network or communications supply chain. The second certification affirms compliance with Section 54.10, which prohibits the use of any Federal subsidies on any communications equipment and services on the Covered List, which includes those offered by Huawei Technologies Company, ZTE Corporation, Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, and Dahua Technology Company, and their affiliates and subsidiaries.

- **FY2020 Applicants**: If you requested services or equipment provided that contain components of products produced by any of the listed covered companies, or any of their parents, affiliates and subsidiaries in FY2020, you cannot invoice for these funds. Instead, you should immediately request a service substitution prior to invoicing in order to ensure complete program compliance.

- **FY2021 Applicants**: If you identify the use of covered equipment/services on your submitted funding request form please email RHC-Assist@usac. org with your FRN number. We will work with you to take corrective action to ensure compliance. For all approved FRNs, request a service substitution prior to invoicing in order to ensure complete program compliance.

- **FY2022 Applicants:** As you proceed with competitive bidding beginning in July, please ensure you are not requesting funding for services or equipment from Huawei Technologies or ZTE, Hytera, Hangzhou Hikvision, or Dahua or any of their parents, affiliates and subsidiaries.

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Supply Chain Web Page

- [Supply Chain web page](#)

Questions?

Search Posted Services

FY2022 Request for Services Best Practices

Search Posted Services

About	E-rate	Rural Health Care	Lifeline	High Cost	Service Providers

Getting Started

Commitment Info

Service Providers

Healthcare Connect Fund Program

Determine Eligibility of Your Site

Develop Evaluation Criteria & Select Services

Evaluate Bids & Select Service Provider

Submit Funding Requests

Review Your Funding Commitment Letter (FCL)

Invoice USAC

What is a Consortia?

Telecommunications Program

Determine Eligibility of Your Site

Prepare For Competitive Bidding & Request Services

Evaluate Bids & Select Service Provider

Submit Funding Requests

Review Funding Commitment Letter (FCL)

Invoice USAC

Additional Program Guidance

FCC Report and Order 19-78

Funding Year Overview

Authorizations

Evergreen Contracts

Document Retention

FCC Orders and Resources

Resources

My Portal

Forms

Tools

Upcoming Dates

Announcements

Appeals & Audits

Learn

Webinars

Videos

Sample Documents

Newsletter

FAQs

Contact Us

Search Posted Services

Search Posted Services

Questions?

Submitting the FCC Form 465

FY2022 Request for Services Best Practices

Eligibility Info

- HCP Location Information
  - Address
  - FCC RN

- Mailing Contact
  - Primary Account Holder information

- Eligibility
  - Select HCP Type

- Additional Information
  - EIN, NPI, Taxonomy Code

- Watch Eligibility Best Practices Webinar

Request for Services

Request for Services

- Enter the posting information for this service request.

Add Services

Block 5: Request for Services

📄 Preview form ❓ Form Guide

Line 30: The HCP is requesting reduced rates for: 🔵 Telecommunications Service

Requested Contract Period [   ] ❗

Number Of Days USAC Should Post [28   ] ✔

Posting End Date [28 days after posting   ] ✔

Expected Bid Evaluation Period (days) [   ] ❗

Identify services for which the applicant is requesting bids. Select all that apply. If appropriate, enter a bandwidth range for each service the applicant is requesting. ✔

Add All Services

Services	Input if Other	Minimum Download Bandwidth (Mbps)	Maximum Download Bandwidth (Mbps)	Minimum Upload Bandwidth (Mbps)	Maximum Upload Bandwidth (Mbps)	The HCP seeks bids for similar services if appropriate	
Select A Service ▾						☑	Delete

Add Services

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Request Services

Does the applicant require a Service Level Agreement (SLA) [No ▾]

Identify Anticipated Application(s) and Use(s) of the Supported Connection ❗

Category: Interactive
- ☐ Distance learning/training
- ☐ Real-time remote examination, consultation, and/or monitoring
- ☐ Video conferencing
- ☐ Voice service
- ☐ Other (describe)

Category: Transactional
- ☐ Distance learning/training
- ☐ Electronic patient billing
- ☐ Exchange of electronic health records
- ☐ Transmission of large files (e.g., X-ray images, MRI, etc)
- ☐ Other (describe)

Category: Bulk
- ☐ Electronic patient billing
- ☐ Exchange of electronic health records
- ☐ Transmission of large files (e.g., X-ray images, MRI, etc.)
- ☐ Transmission of store and forward consultations
- ☐ Other (describe)

Category: Miscellaneous
- ☐ Backup/redundant connectivity
- ☐ Other (describe)

Minimum Requirements for Bid Evaluation Criteria and Disqualification Factors

Additional Documentation

Declaration of Assistance

- Add the contact information of those who assisted in the preparation of the form (if applicable).

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Certification

- All certifications must be checked and you must preview the form.

RHC Note: Read the information in each certification carefully before certifying, signing, and submitting this form. If you are unsure about any of the information you should contact the RHC team prior to submitting.

- ☐ Line 31: I certify under penalty of perjury that I am authorized to submit this request on behalf of the applicant or consortium.
- ☐ Line 32: I certify under penalty of perjury that the applicant has complied with all applicable state, Tribal, or local procurement rules.
- ☐ Line 33: I certify under penalty of perjury that all requested RHC Program support will be used solely for purposes reasonably related to the provision of health care service or instruction that the applicant is legally authorized to provide under the law of the state in which the services are provided.
- ☐ Line 34: I certify under penalty of perjury that the applicant seeking supported services is a public or non-profit entity that falls within one of the seven categories set for in the definition of health care provider listed in 47 CFR § 54.600 of the Commission's rules.
- ☐ Line 35: I certify under penalty of perjury that the applicant seeking support services is physically located in a rural area as defined in section 47 CFR § 54.600 of the Commission's rules.
- ☐ Line 36: I certify under penalty of perjury that the applicant has reviewed and will comply with all applicable RHC Program requirements.
- ☐ I certify under penalty of perjury that I have examined this request and all attachments, and to the best of my knowledge, information, and belief, all statements contained herein and in any attachments are true.
- ☐ I certify under penalty of perjury that the supported services will not be sold, resold, or transferred in consideration for money or any other thing of value.
- ☐ I certify under penalty of perjury that the applicant satisfies all of the requirements under section 254 of the Communications Act and applicable Commission rules.
- ☐ I understand that all documentation associated with this request must be retained for a period of at least five years pursuant to 47 CFR § 54.631, or as otherwise prescribed by the Commission's rules.

Consultants (fee for service): Upload an LOA with the HCP to verify you are authorized to access the HCP's account information.
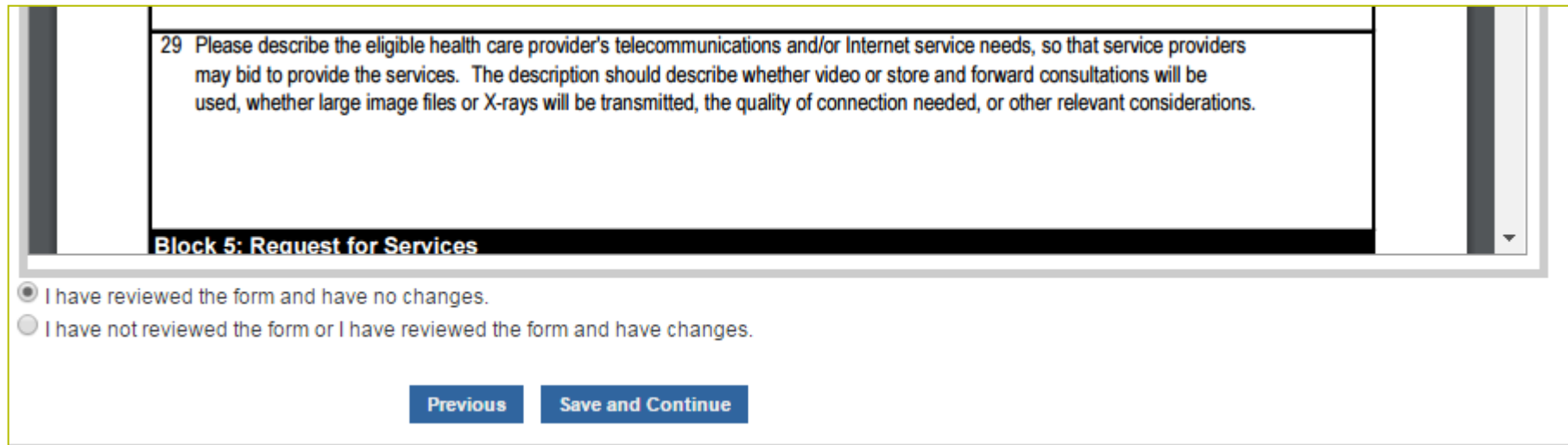
Attach Supporting Documentation   [➕ Upload...]

You must select all certifications before advancing.

Preview FCC Form 465

- Must select "I have reviewed the form and have no changes." to proceed.

Required Certification

Block 6: Certification

Approved by OMB
3060-0804

RHC Note: By completing this section, you are electronically signing this form. Your electronic signature is the same as your hand-written signature would be on this form. By typing your password in the signature field below, and clicking on the "Certify & Submit" button, you will have electronically signed the form. The complete Terms and Conditions that govern the user of this system can be found by clicking on the Terms and Conditions link below.

You must select "Accept" to move to the signature block. Selecting "Reject" will return you to My Portal, where this form will be saved in draft status under the My Forms tab.

Accept   Reject

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Required Certification

- Your signature is your My Portal password.

After Submitting

- You will receive an email confirmation that your form was submitted along with a copy of the PDF form. If you do not receive a confirmation email, reach out to RHC-Assist@usac.org.

- Respond to Information Requests within 14 calendar days or by the deadline listed in the email.

    - Failure to respond to the Information Request will result in a denial

    - Information requests will come from My Portal or a reviewer using an @usac.org domain address

- Note: Order DA 21-394 extended response deadline by an additional 28 days if an applicant requests the extension before the expiration of the initial 14-day deadline. This relief applies to Information Requests issued from April 8, 2021 through December 31, 2021.

Questions?

Best Practices and Resources

FY2022 Request for Services Best Practices

Best Practices: Communicating with Your Service Provider

- Once your ACSD has passed and you've chosen a service provider, include them when you reply to Information Requests via email.

- Ensure your service provider is aware of all the necessary documentation needed for future steps in the application process.

- Include language in your bid documentation that confirms your service provider will act in compliance with all RHC program rules and FCC Orders.

- All bid correspondence should be handled via email for audit purposes.

- HCPs and service providers are required to retain documentation for a period of five years.

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Milestones to Receive Funding for FY2022: Telecom Program

Telecom Program Form	Last Day to Submit
FCC Form 465 (Eligibility & Request for Services)	February 10, 2022 Recommended Date
FCC Form 466 (Funding Request)	April 1, 2022 **Deadline to Submit***

* Please note that the Form 465 submission date is not a mandatory, but rather a recommended milestones to ensure that the FCC Form 465 is posted to USAC's website early enough for a 28-day competitive bidding period before the deadline to submit an FCC Form 466.

RHC Learn

Resources

- [Competitive Bidding FAQs](#)

- [RHC Program Request for Services Dataset](#)

- Search Posted Services
  - [Telecom Program](#)

- Subscribe to the [RHC Monthly Newsletter](#)

- Blank [FCC Form 465 and Instructions](#)

RHC Help Desk

- Email: RHC-Assist@usac.org

  - Include in your email

    - HCP Number

    - FRN Number

- Phone: **(800) 453-1546**

  - Hours are 8 a.m. – 8 p.m. ET Monday - Friday

RHC Help Desk

The Help Desk CAN	The Help Desk CANNOT
• Answer general questions regarding both programs	• Determine the eligibility of a specific site or services before an official form submission
• Provide account holder information for an HCP	• Review a form for accuracy before submission
• Provide clarity regarding FCC Reports and Orders	• Contact a service provider or account holder on someone else's behalf
• Provide helpful resources and best practices	• Provide documents that are not already accessible in My Portal
• Assist with My Portal	• Transfer a call to a specific form reviewer

Questions?

Thank You!