

HCF Program Request for Services – Best Practices for FY2025

Submitting the FCC Form 461 August 21, 2024



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 - 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 will be posted with the recording to the <u>Webinars</u> webpage



Meet Our Team



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Agenda

- Overview
- RHC Program Updates
- Competitive Bidding
 - Evaluation Criteria
 - Competitive Bidding Exemptions
 - Requests for Proposal
- Search Posted Services
- Submitting the FCC Form 461
- Best Practices and Resources

By the end of this webinar, you will be able to...

- Complete and submit an FCC Form 461 in RHC Connect
 - 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

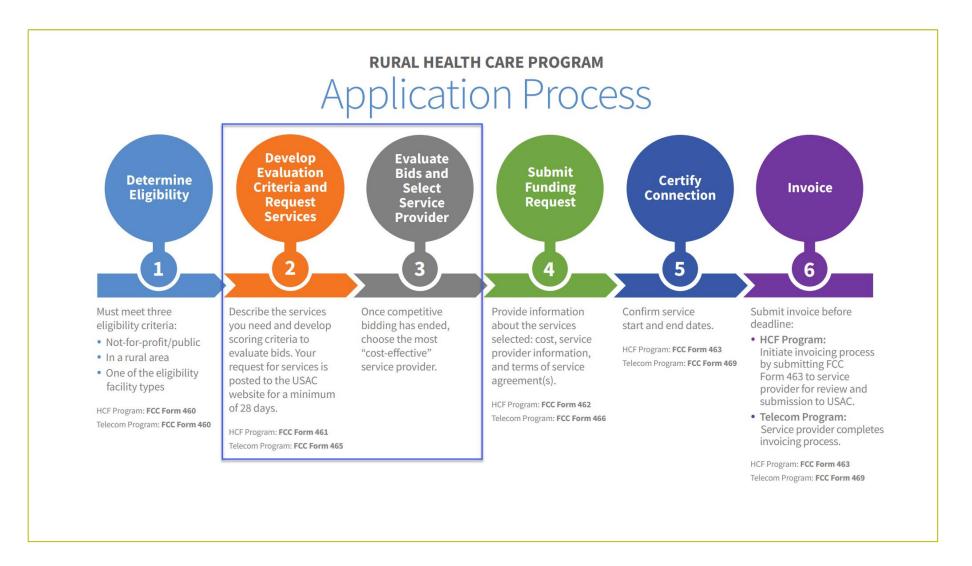
RHC Program Glossary

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

Submitting the FCC Form 461

Competitive Bidding



What is a Request for Services?

- The HCP submits the FCC Form 461 to let service providers know what types of services and/or equipment are being requested.
- Service providers use the information on the FCC Form 461 to create a bid to provide those services.
- For the Healthcare Connect Fund (HCF) Program, the FCC Form 461 is the "Request for Services" form.

What is a Request for Services? (continued)

- The HCP and service provider may not enter into an agreement to purchase services until 28 days after the FCC Form 461 is posted.
 - The 28-day competitive bidding process begins the next full business day after the form 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 2025





JULY 1, 2024: First Day to Submit Request for Services Form

- FCC Form 461 HCF Program
- FCC Form 465 Telecom Program
- Request for services must be posted to USAC's website by March 4, 2025



DEC 1, 2024 - April 1, 2025: Funding Request Filing Window

- FCC Form 462 HCF Program
- FCC Form 466 Telecom Program



O OCT 28, 2026: Invoice Filing Deadline

- FCC Form 463 HCF Program
- Telecom Invoice

Program Updates

Submitting the FCC Form 461

Reminder – FCC Order 23-110

- <u>FCC Order 23-110</u> improves RHC program administration and facilitates participation in the program by allowing health care providers that expect to become eligible during a funding year to complete the processes required to request funding.
- The order permits health care providers to be granted conditional eligibility, thus allowing them to initiate competitive bidding and request funding while awaiting a final eligibility determination.
 - USAC will implement the FCC Form 460 and 465 changes after the FCC receives Paperwork Reduction Act approval.
 - Conditional eligibility will also be deployed for the FCC Forms 461 and 465.
- The order adopts the FCC Form 460 for eligibility determinations in the Telecom Program, which will eliminate the need for Telecom Program participants to seek an eligibility determine every time they engage in competitive bidding.

Supply Chain Order

- As a reminder, when service providers login to My Portal and RHC Connect, they will see two new supply chain certifications included in the FCC Form 463 and Telecom Program invoice/FCC Form 469.
- The first certification affirms compliance with the <u>Section 54.9</u> prohibition on USF for specified transactions with companies deemed to pose a national security threat. The second certification affirms compliance with <u>Section 54.10</u>, which prohibits the use of any Federal subsidies on any communications equipment and services on the <u>Covered List</u>.
- **FY2024 Applicants**: If you requested services or equipment that contain components of products produced by any of the listed covered companies or their parents, affiliates or subsidiaries in FY2024, you cannot invoice for these funds. Instead, you should immediately request a <u>service substitution</u>.
- **FY2025 Applicants:** As you proceed with competitive bidding, please ensure you are not requesting funding for services or equipment from listed covered companies or any of their parents, affiliates or subsidiaries.

Supply Chain Web Page

Supply Chain webpage



Questions?

Competitive Bidding

Submitting the FCC Form 461

Competitive Bidding

- The purpose of competitive bidding is to allow all service providers an equal opportunity to understand the HCP's service requirements and offer the most cost-effective solution to address those needs.
- RHC program rules and FCC Orders require a fair and open competitive bidding process.

Competitive Bidding (continued)

- Service providers who plan to bid cannot assist with the preparation of the FCC Form 461, choose a winning bidder, or participate in the vendor selection process in any way.
- All potential bidders 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 all applicable state, Tribal, or local procurement laws.

Bid Evaluation Criteria

- The bid evaluation criteria is a list of weighted standards included in the FCC Form 461, that will be used to determine the most cost-effective bid.
- Applicants must disclose minimum requirements for each criterion.
- Each criterion is given a certain weight. The sum of these weights must equal 100.
- The bid evaluation criteria should address the needs of the HCP as indicated on the FCC Form 461 and be based on the FCC's definition of "cost-effective."
- Price must be a primary factor but need not be the only primary factor.
- Although other factors may receive the same weight as price, no single factor can receive a weight that is greater than price.

Example of Evaluation Criteria

Criteria	eria Description (if 'Other') Minimum Require		nent Weight (%)
Price			32%
Prior experience past performanc	_	If no experience with HCP, 3 references required	30%
Technical Suppo	ort	24-hour support team	28%
Other	Account Management	Account Management - Dedicated account contact	10%

Examples of Evaluation Criteria

Bid evaluation criteria should include the factors that are most important to satisfy the needs and requirements of the HCP.

Criteria commonly included on the FCC Form 461 other than price are:

- Technical support;
- Quality of transmission;
- Reliability;
- Service provider to provide a single point of contact; and
- Prior experience, including past performance.

What is a Competitive Bidding Exemption?

- In some cases, the service needs or contract conditions allow the HCP to be exempt from competitive bidding.
- With a competitive bidding exemption, HCPs will not have to undergo competitive bidding and will not need to create evaluation criteria or collect bids from service providers.
- A competitive bidding exemption allows the HCP to skip the FCC Form 461 entirely and proceed directly to submitting a funding request.

Competitive Bidding Exemptions

- HCPs must meet one of the following criteria to be exempt from submitting the FCC Form 461 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 the HCP and others, and was awarded pursuant to applicable competitive bidding requirements;
 - Requesting support using contracts previously approved by USAC (MSA under the RHC Pilot Program or the HCF Program);
 - Using an active, multi-year contract designated as <u>evergreen</u> for the RHC program (exemption applies for the life of the contract); or
 - Using a contract approved under the Schools and Libraries (E-rate) program.
 - Seeking support for \$10,000 or less of total undiscounted eligible expenses for a single year under a
 contract with a term of one year or less.
- If the HCP does not meet any of the competitive bidding exemptions, the FCC Form 461 must be submitted, and the HCP must go through competitive bidding.

Evergreen Contracts

- HCPs are not required to file an FCC Form 461 or competitively bid for the life of a multi-year contract designated as <u>evergreen</u> under the HCF or Telecom Programs.
- A 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); and
 - 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.

Site and Service Substitutions

- Site and service substitutions allow the HCP to reallocate un-invoiced committed funds to substitute the services, modify the services, or provide the requested services to other eligible sites.
- Substitutions allow the flexibility, for an HCP with an approved funding commitment, to spend all of the committed funds, even if the USAC-supported services or the service locations may change over the course of the commitment.
- An HCP may request a site or service substitution if:
 - The substitution is provided for, in the contract, within the change clause, or constitutes a minor modification;
 - The requested change is within the scope of the controlling Request for Services, including any applicable RFP used in the competitive bidding process; and
 - The substitution does not violate any contract provision or state, Tribal, or local procurement laws.
 - The site must be an eligible HCP and the service be an eligible service under RHC program rules.
- HCPs with month-to-month approved funding commitments may not utilize site and service substitutions as they did not apply with a contract.
- Site and service substitutions must be submitted by the service delivery deadline.
- Click here for more information about <u>site and service substitutions</u>.

Requests for Proposal

- A <u>Request for Proposal</u> (RFP) is a comprehensive bidding solicitation that describes the business priorities and functional requirements of the HCP in sufficient detail to ensure an effective and fair and open competitive bidding process.
- Per FCC Order 19-78 an HCP is required to submit an RFP if:
 - (A) it is required under applicable state, Tribal, or local procurement rules or regulations;
 - (B) the HCP is a consortium seeking more than \$100,000 in program support during the funding year, including applications that seek more than \$100,000 in program support for a multi-year commitment; or
 - (C) the HCP is a consortium seeking support for participant-constructed and owned network facilities.

Requests for Proposal (continued)

- If the HCP chooses to include an <u>RFP</u>, it must be submitted with the FCC Form 461 for USAC review and approval, and it should include, at a minimum:
 - A description of the service needs and a defined scope of the project and network costs (if applicable);
 - The number of days during which bids will be accepted (28 days or more);
 - Clearly delineated deliverables; and
 - The bid evaluation criteria, including the weight assigned to each criterion.
- The RFP should align with all of the data entered into the FCC Form 461 and provide more details.

Service Providers and Competitive Bidding

- Service providers are prohibited from preparing, signing, or submitting an HCP's FCC
 Form 461 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, and any funding
 payments will be subject to rescission.

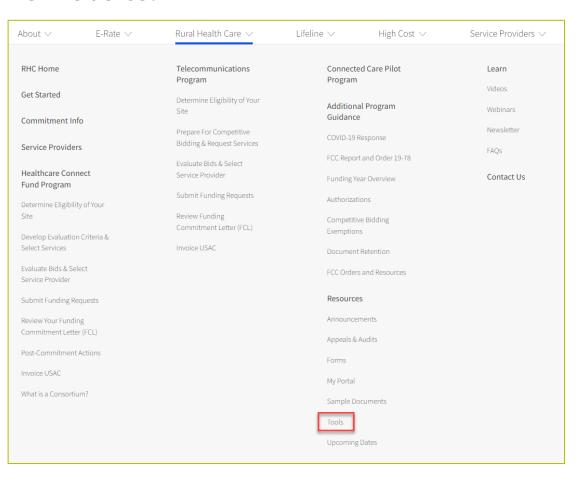
Questions?

Search Posted Services

Submitting the FCC Form 461

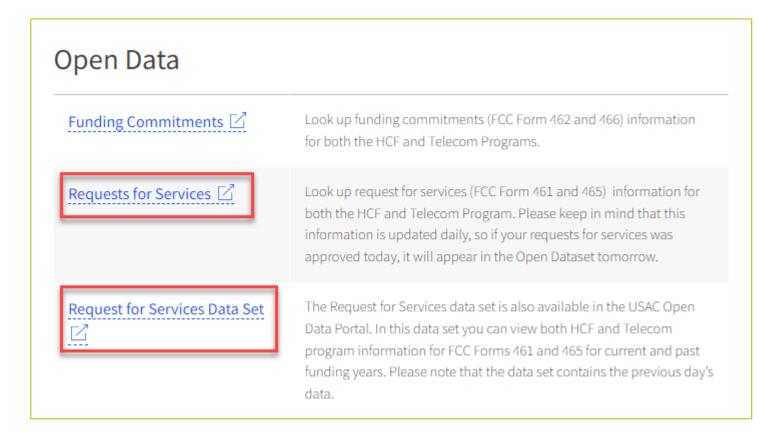
HCF & Telecom Search Posted Services

 The Search Posted Services tool for HCF and Telecom has moved to the Open Data Platform on the USAC website.



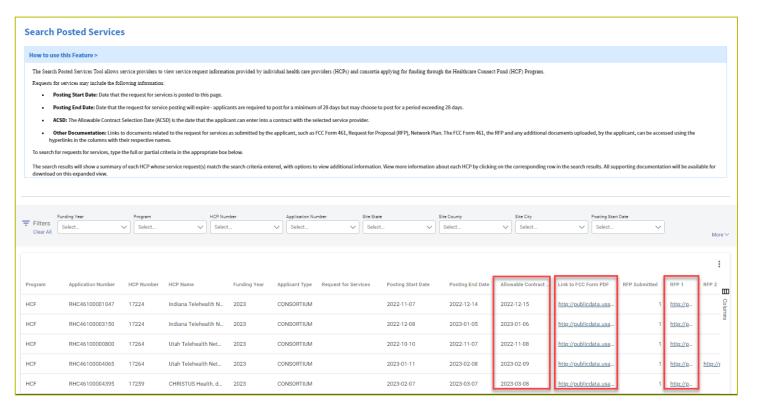
Search Posted Services (continued)

 Request for Services is a streamlined tool and Request for Services Data Set is the complete data set.



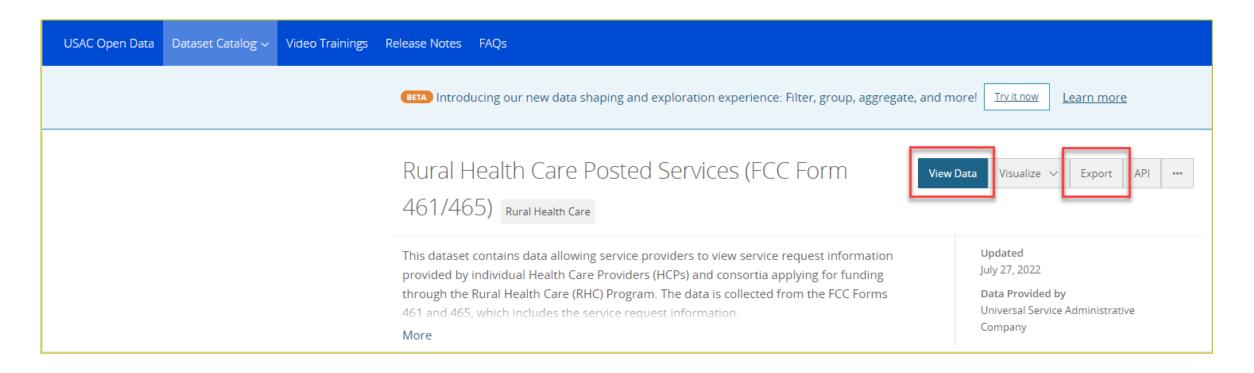
Search Posted Services - Requests for Services

- A PDF copy of the FCC Form 461, RFP (if applicable), and any additional posted supporting documentation can be downloaded by clicking the hyperlink under each column.
- ACSD is clearly displayed.



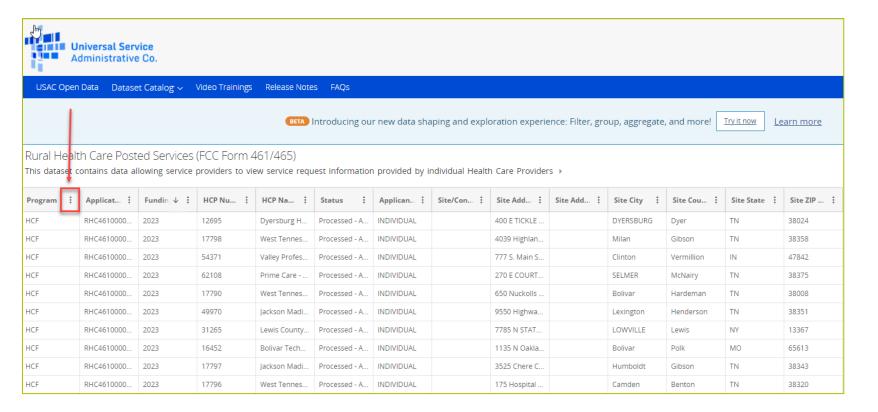
Search Posted Services – Request for Services Data Set

• You can view the dataset directly on the screen or you can export the data to an Excel spreadsheet.



Search Posted Services – Request for Services Data Set (continued)

- This is the on-screen view of the dataset.
- Click the three dots beside each column title to sort and filter.

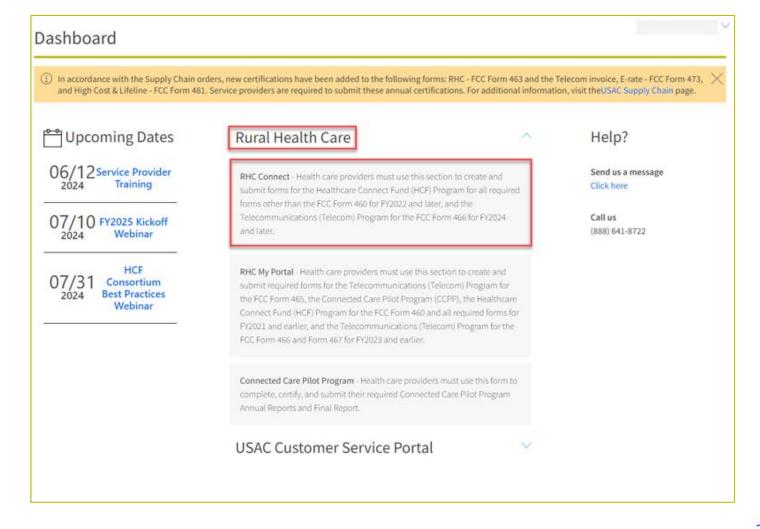


Submitting FCC Request for Services Forms in RHC Connect

Submitting the FCC Form 461

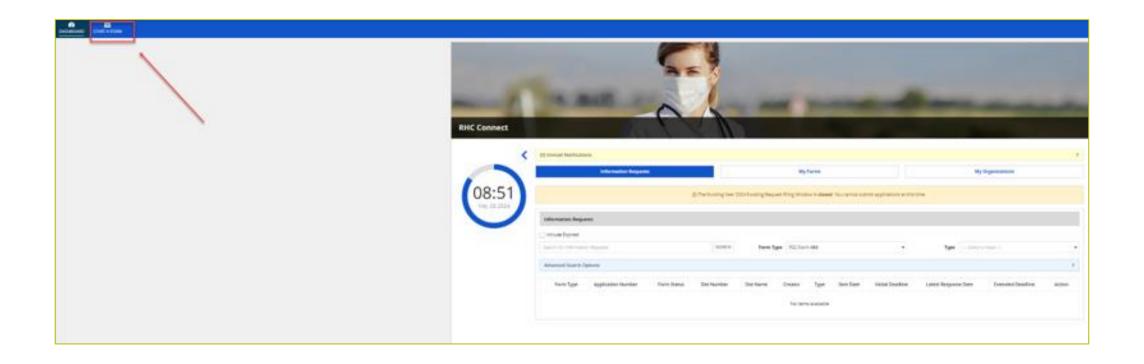
My Portal Landing Page

 Log into My Portal and click on RHC Connect.



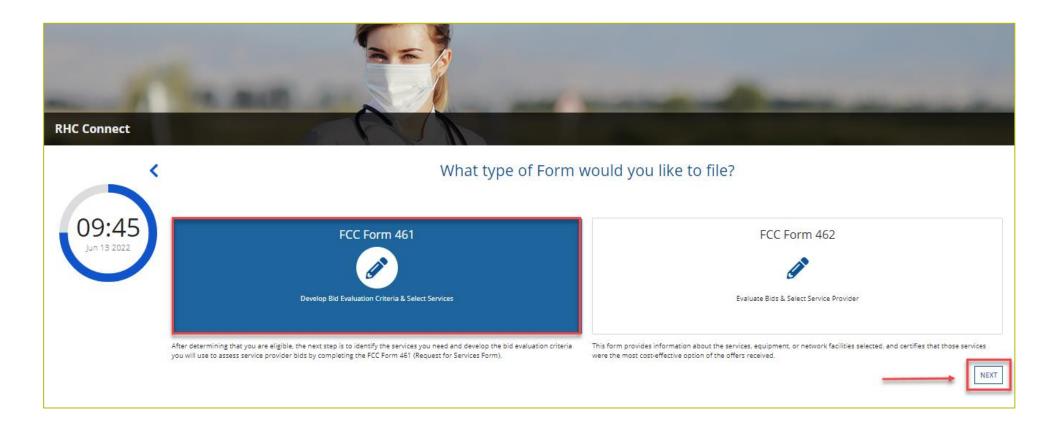
RHC Connect

• Click Start a Form.



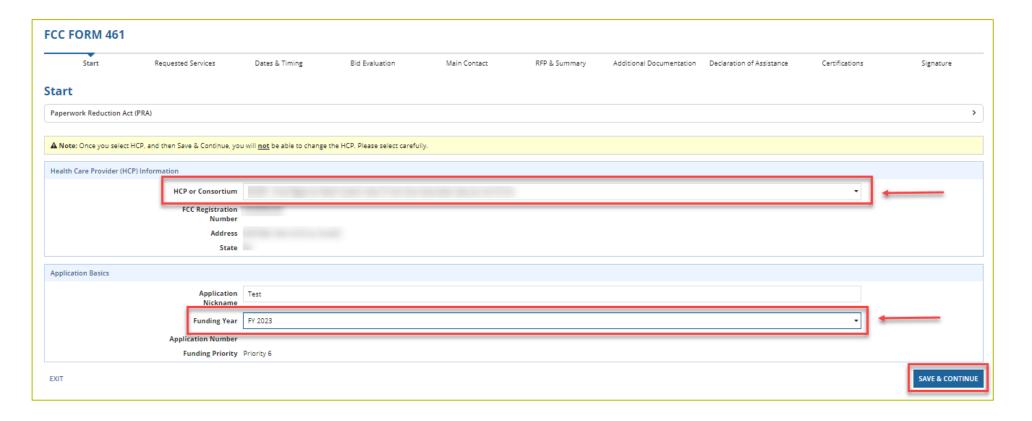
RHC Connect (continued)

• Click Next.



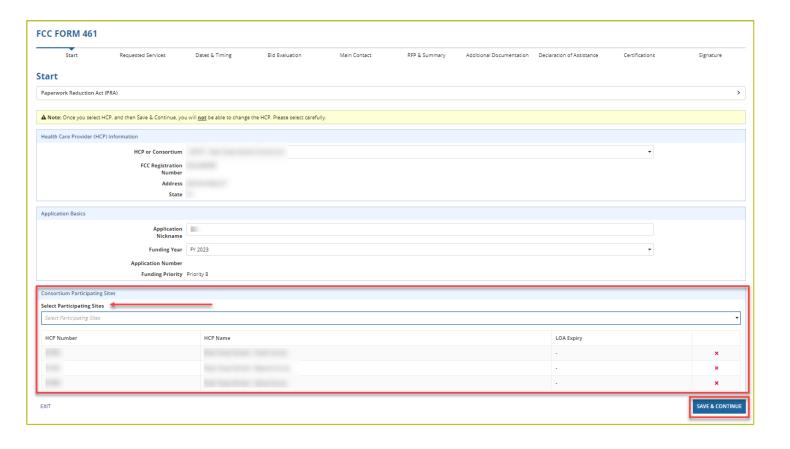
Start

- Select the HCP from the drop-down menu and select funding year.
- Click Save & Continue.



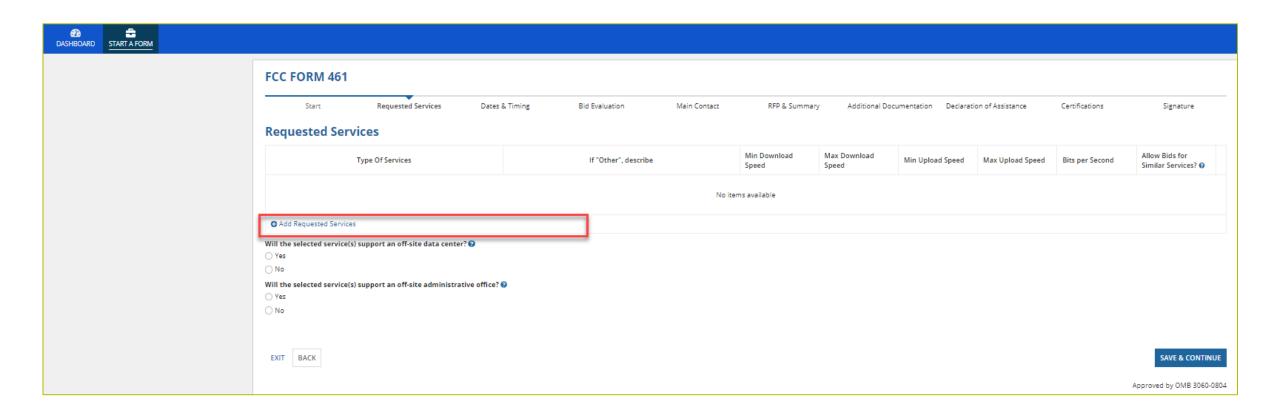
Start (continued)

- If you select a consortium, select all participating sites from the second drop-down menu.
- Click Save & Continue.



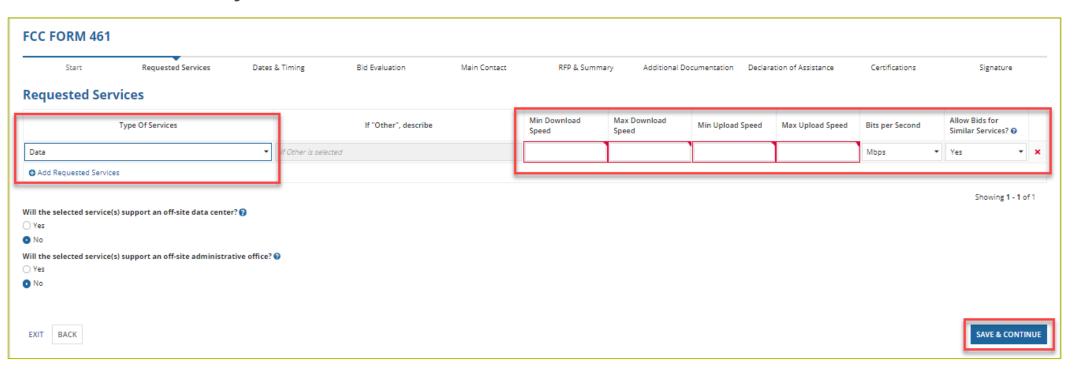
Requested Services

• Click Add Requested Services.



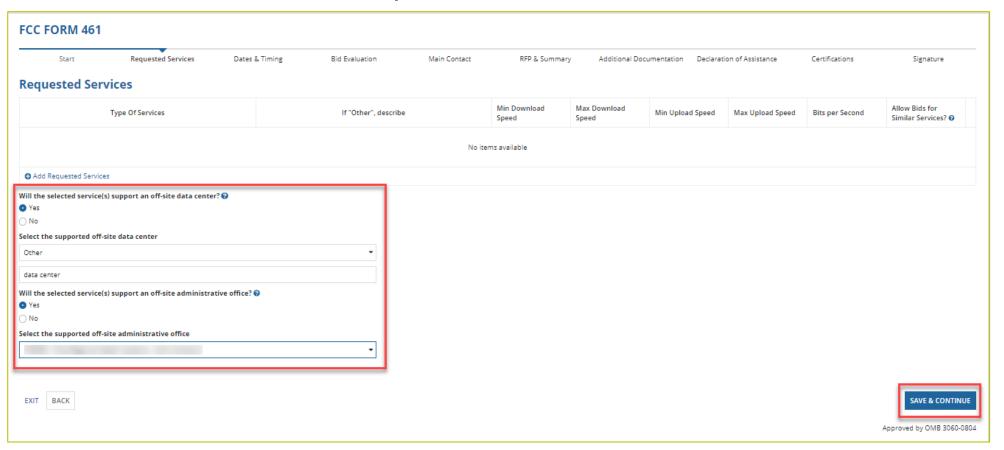
Requested Services (continued)

- Select type of service from the drop-down menu.
- Enter minimum and maximum bandwidths.
- Answer Yes or No if you'll consider bids for similar services.



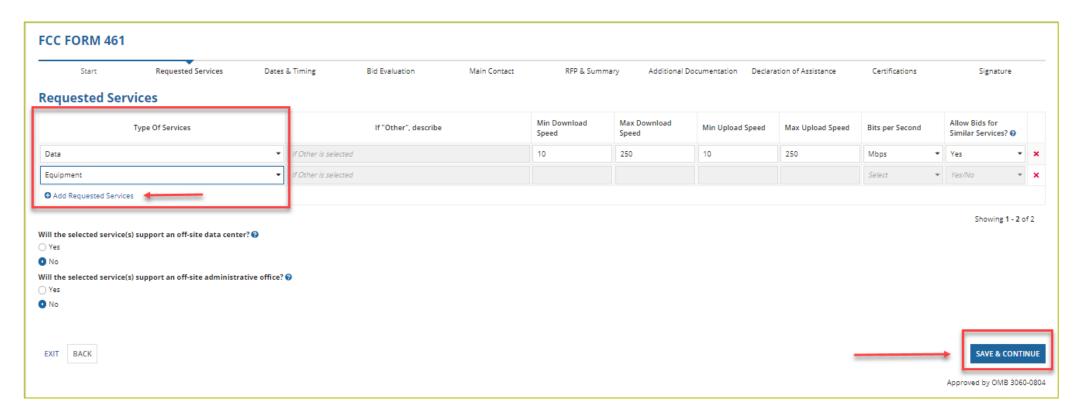
Requested Services (continued)

- Answer questions about off-site data centers and off-site administrative offices.
- If you answer **Yes**, you'll be asked to select the off-site data center or off-site administrative office from the drop-down menu.



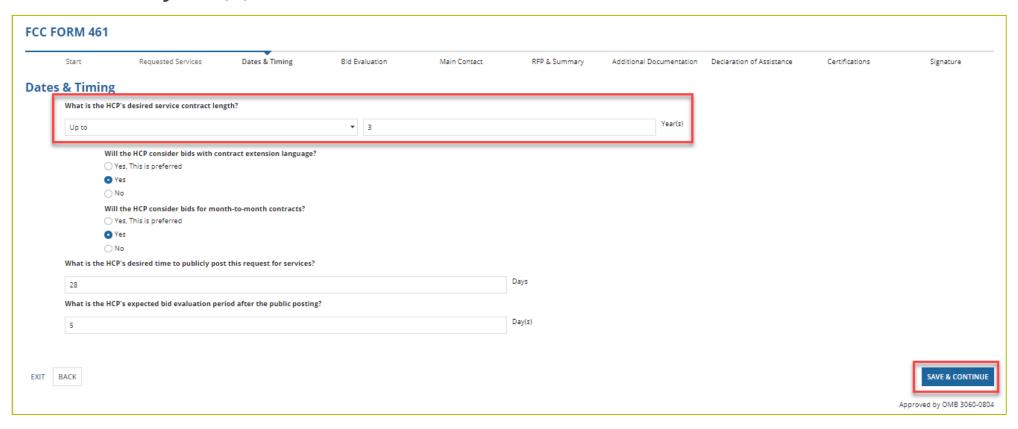
Requested Services (continued)

- Click Add Requested Services for each additional service and follow the same steps.
- Click Save & Continue.



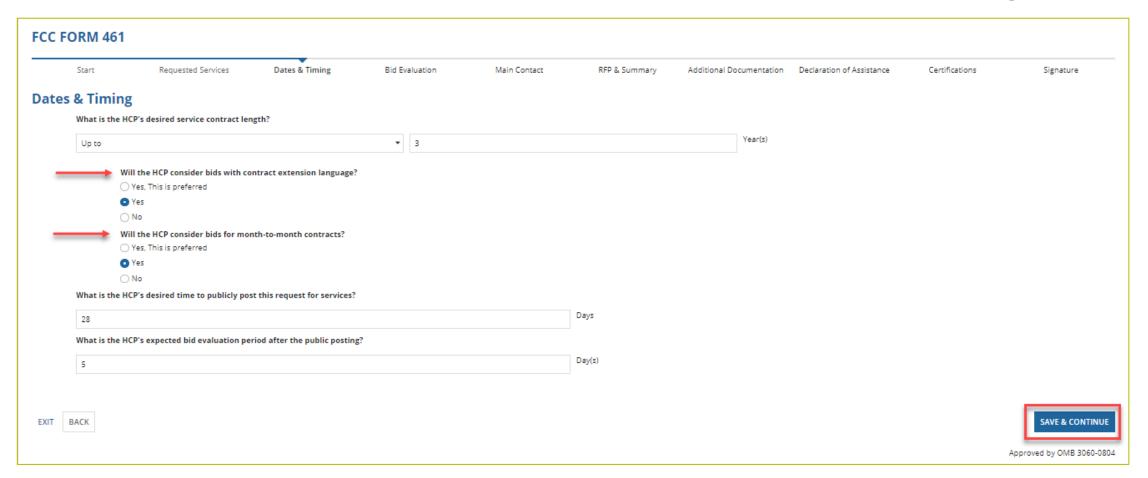
Dates & Timing

- Use the drop-down menu to select **Up to** or **Equal to** to select the desired contract length.
- Enter number of year(s).



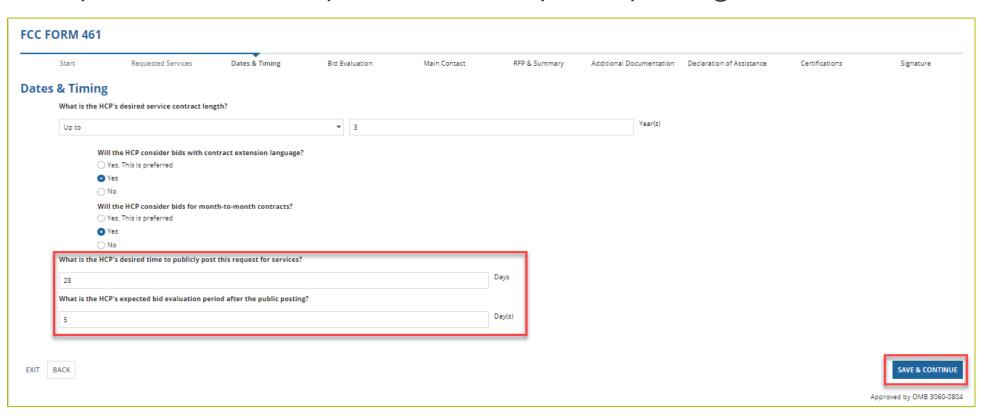
Dates & Timing (continued)

· Answer the questions about contract extensions and month-to-month agreements.



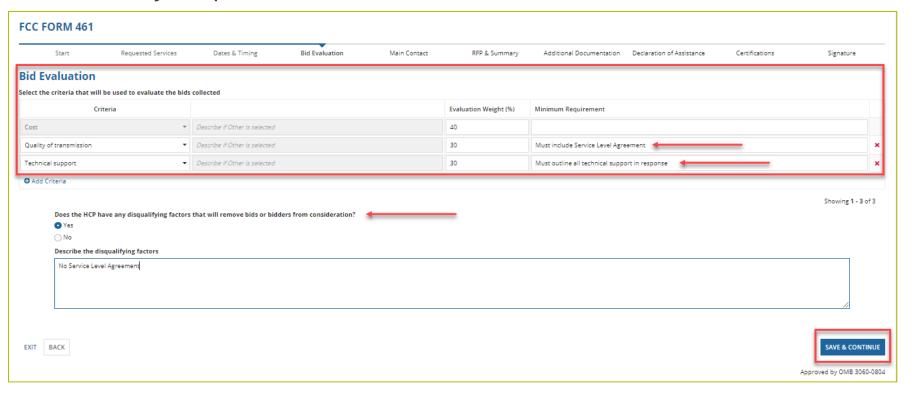
Dates & Timing (continued)

- Enter the desired time to publicly post the request for services.
 - A minimum of 28 days is required under program rules.
- Enter the expected evaluation period after the public posting ends.



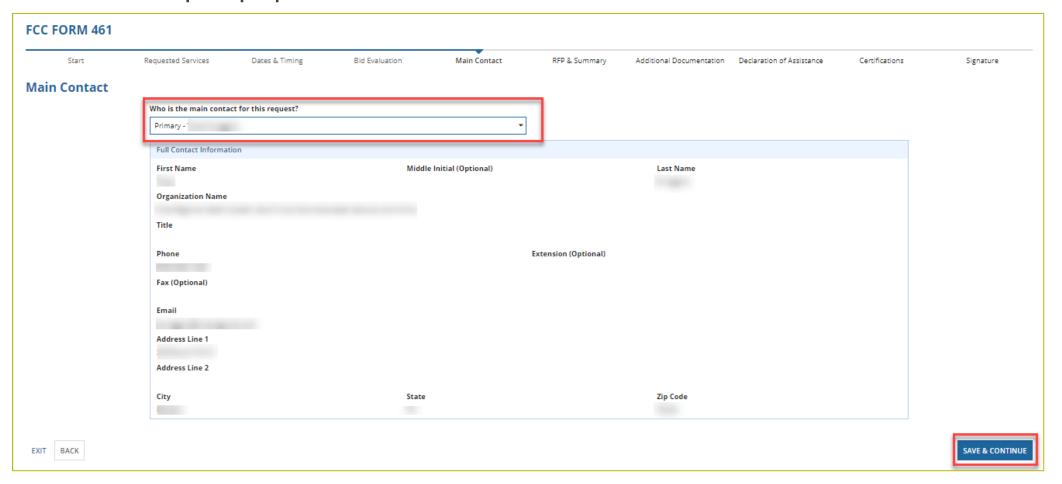
Bid Evaluation

- Choose the bid evaluation criteria from the drop-down menu.
 - If you select **Other**, provide a description of the criterion.
- Enter the description of minimum requirements for each criterion.
- Provide details about any disqualification factors.



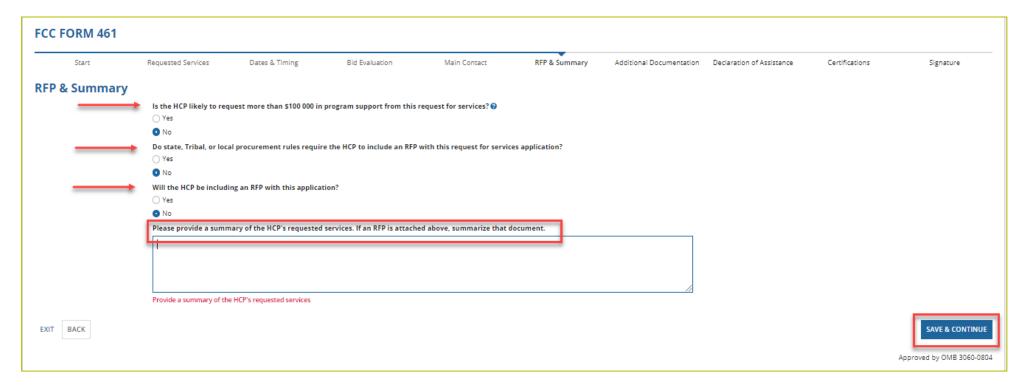
Main Contact

- Choose an account holder from drop-down menu.
- Information is pre-populated based on information from the FCC Form 460.



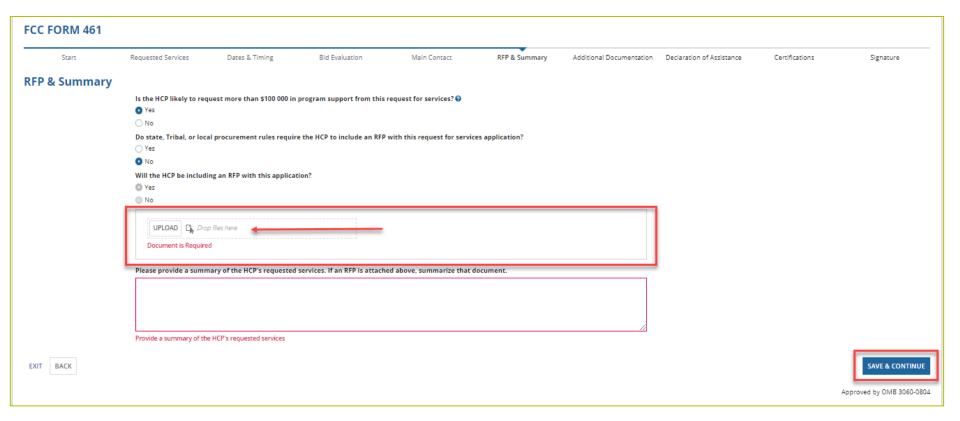
RFP & Summary

- Answer questions about the RFP.
- Provide a summary of requested services and/or RFP (if applicable).



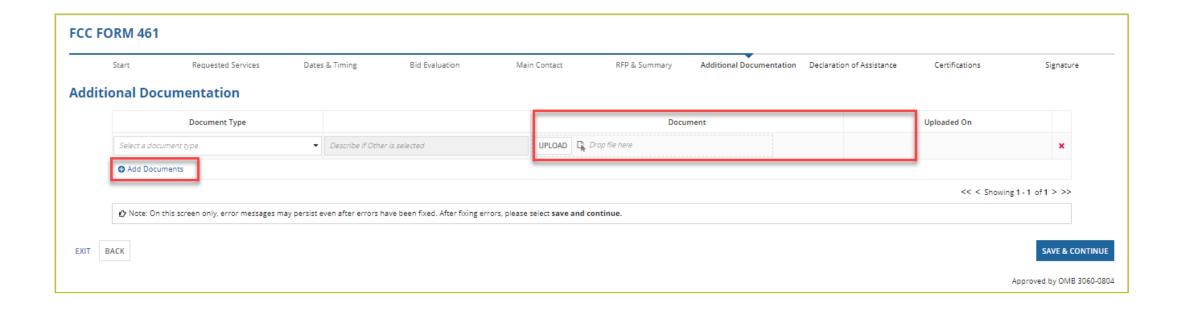
RFP & Summary (continued)

- If a consortium applicant answers **Yes** to the first question, the third question defaults to **Yes**.
- Upload the RFP.



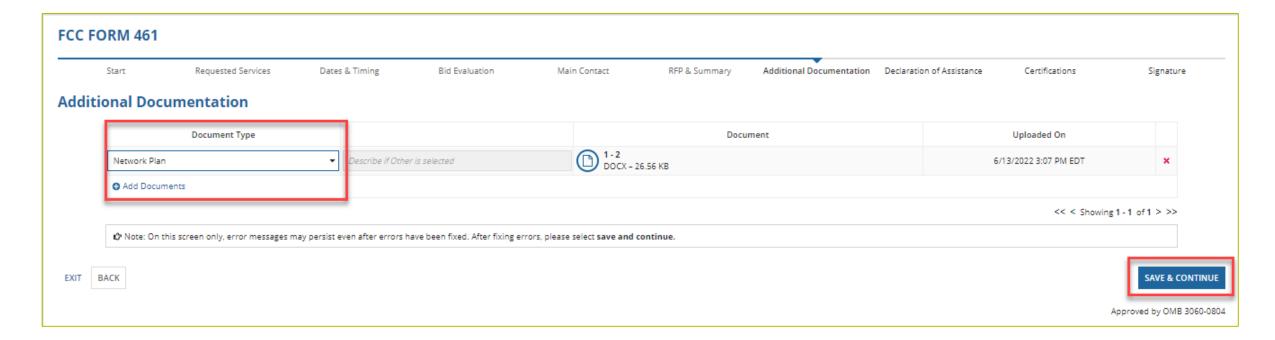
Additional Documentation

• Click **Add documents** for each additional document you are including in your submission.



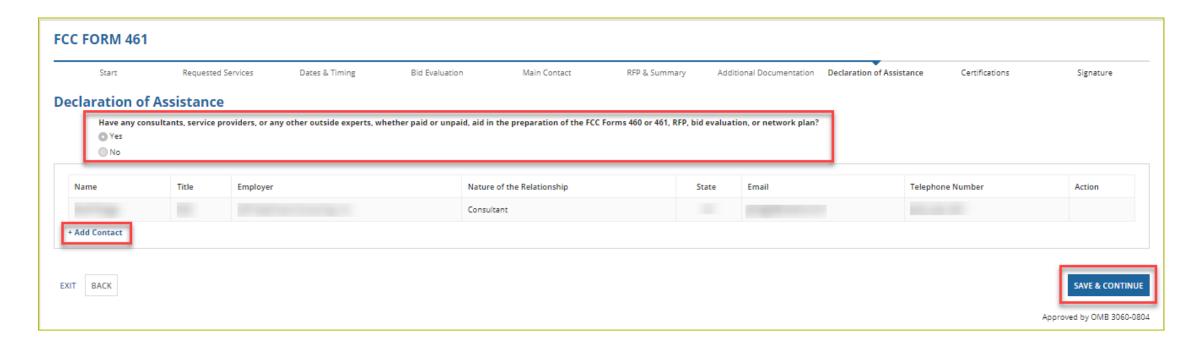
Additional Documentation (continued)

- Use the drop-down menu to select Network Plan or Other.
 - Consortia applicants are required to upload a Network Plan.
 - If **Other** is selected, provide a description of the uploaded document.
 - <u>Network Plan</u> webpage

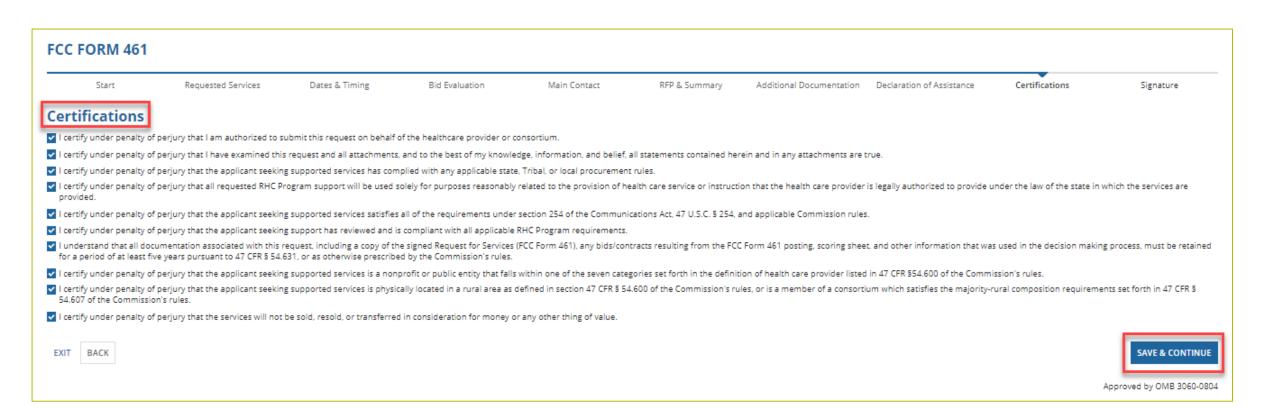


Declaration of Assistance

- Enter information about third parties who assisted the HCP with preparing any FCC forms or participated in the competitive bidding process.
- If a Tertiary Account Holder submits the FCC Form 461, this field is auto-populated with their information.

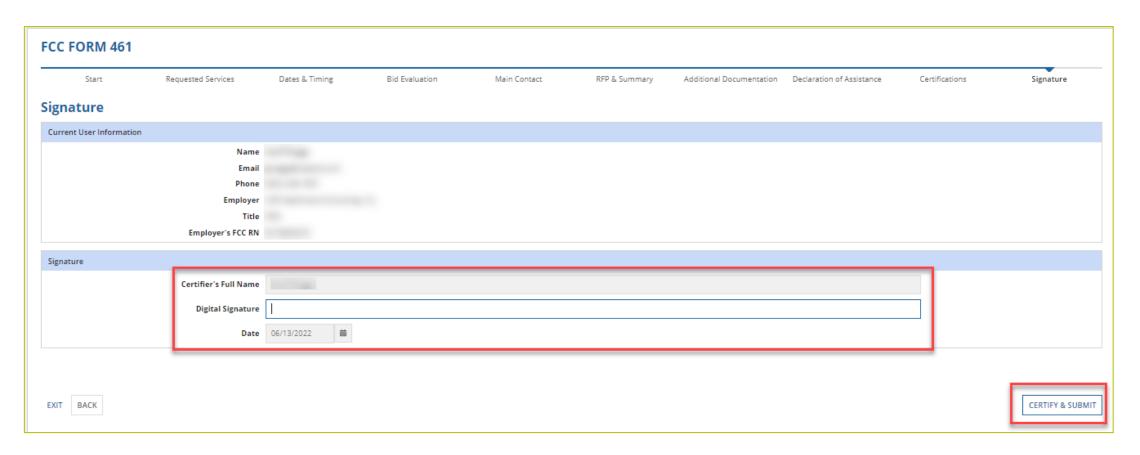


Certifications



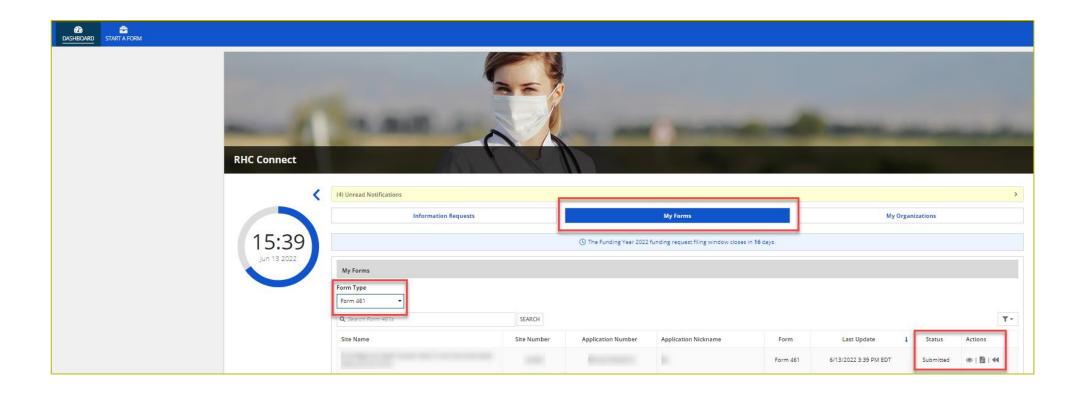
Signature

• Sign by typing your first and last name in the **Digital Signature** field.



After Submitting

- After submitting the FCC Form 461, you will be directed back to the Dashboard.
- Click on **My Forms** and filter on **Form Type** to view, download a PDF of the FCC Form 461, or withdraw the form.



After Submitting (continued)

- An email will be sent confirming that your form was submitted along with a copy of the PDF form. If you do not receive a confirmation email, reach out to the RHC Customer Service Center at 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.
- Applicants can receive HCF Program Information Requests through RHC Connect or by email.
- For FCC Forms 461, an auto-generated email will be sent directing applicants to RHC Connect to respond.
- Applicants should respond through RHC Connect only.

Questions?

Best Practices and Resources

Submitting the FCC Form 461

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.
- 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 minimum of five years.

Milestones to Apply for Funding for FY2025: RHC Program Recommended Last Day to Submit for HCPs NOT using a Request for Proposal (RFP)

RHC Program Form	Last Day to Submit for HCPs NOT using a Request for Proposal (RFP)
FCC Form 460	January 8, 2025
(Eligibility)	Recommended Date
FCC Form 461	February 10, 2025
(Request for Services)	Recommended Date
FCC Form 462 (Funding Request)	April 1, 2025 Deadline to Submit

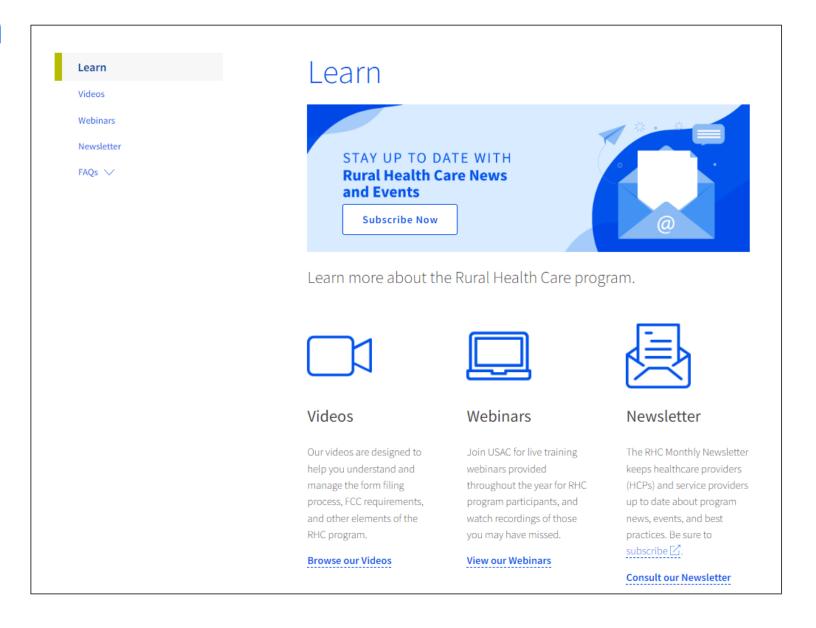
Please note that the FCC Form 460 and 461 submission dates are not mandatory deadlines, but rather recommended milestones to ensure that the FCC Form 461 is posted to USAC's website early enough for a 28-day competitive bidding period before the deadline to submit an FCC Form 462.

Milestones to Apply for Funding for FY2025: RHC Program Recommended Last Day to Submit for HCPs using a Request for Proposal (RFP)

RHC Program Form	Last Day to Submit for HCPs using a Request for Proposal (RFP)
FCC Form 460	January 4, 2025
(Eligibility)	Recommended Date
FCC Form 461	February 1, 2025
(Request for Services)	Recommended Date
FCC Forms 462 (Funding Request)	April 1, 2025 Deadline to Submit

Please note that the FCC Form 460 and 461 submission dates are not mandatory deadlines, but rather recommended milestones to ensure that the FCC Form 461 is posted to USAC's website early enough for a 28-day competitive bidding period before the deadline to submit an FCC Form 462.

RHC Learn



Resources

- Competitive Bidding FAQs
- RHC Program Request for Services Dataset
- Welcome to RHC Connect FCC Form 461
- RHC Connect User Guide FCC Form 461
- Information Request tip sheet
- <u>Network Plan</u> webpage
- Subscribe to the <u>RHC Monthly Newsletter</u>

RHC Program Customer Service Center



Email: RHC-Assist@usac.org

- Include in your email
 - HCP Number
 - FRN Number

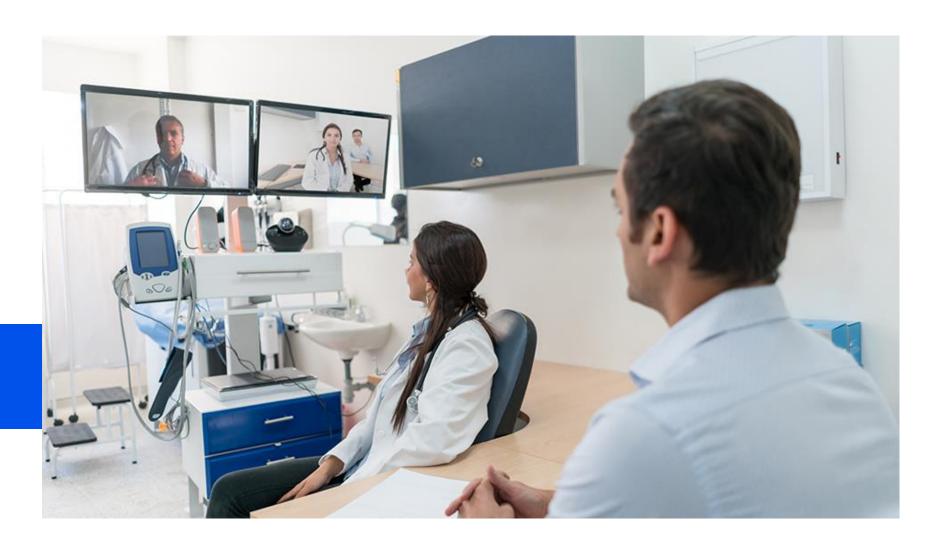


- Phone: **(800) 453-1546**
 - Hours are 8 a.m. 8 p.m. ET
 - Monday- Friday

RHC Customer Service Center

The RHC Customer Service Center CAN	The RHC Customer Service Center CANNOT
Answer general questions regarding both programs	Determine eligibility of a specific site or service before an official form submission
Provide account holder information for an HCP	Review a form or document for accuracy before an official submission
Provide clarity regarding FCC Report and Order 19-78 and other FCC Orders	Contact a service provider or other account holder on someone else's behalf
Provide helpful resources and best practices for forms	Provide documents that are not already accessible in My Portal
Assist with My Portal and with RHC Connect	Transfer a call to a specific form reviewer

Questions?



Thank You!

