RHC Program Request for Services Best Practices for FY2020

Submitting the FCC Forms 461 and 465
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 PRESENTERS

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Program Manager, RHC Outreach

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Manager, RHC Outreach
By the end of this webinar you will be able to…

• Complete and submit an FCC Form 461 and/or 465 in My Portal
  • Submit your request for services to meet the FY2020 filing window deadline
  • Create bid evaluation criteria
  • Abide by competitive bidding rules
  • Identify applicable competitive bidding exemptions

• Locate current requests for services and other important resources on the USAC website
1. Overview
2. FCC Report and Order 19-78
3. Public Notice DA 19-1253
4. Competitive Bidding
   • Evaluation Criteria
   • Competitive Bidding Exemptions
   • Site and Service Substitutions
   • Requests for Proposal
   • Search Posted Services
5. Submitting the FCC Form 461
6. Submitting the FCC Form 465
7. Best Practices & Resources
### Glossary

<table>
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<tr>
<th>Acronym</th>
<th>Meaning</th>
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<tr>
<td>FCC</td>
<td>Federal Communications Commission</td>
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<td>HCF</td>
<td>Healthcare Connect Fund</td>
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<td>FY</td>
<td>Funding Year</td>
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<td>HCP</td>
<td>Health Care Provider (your site)</td>
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<td>HCP Number</td>
<td>Number associated with your site</td>
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<td>PAH</td>
<td>Primary Account Holder</td>
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<td>FRN</td>
<td>Funding Request Number</td>
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<td>LOA</td>
<td>Letter of Agency (HCF Program Only)</td>
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<tr>
<td>ACSD</td>
<td>Allowable Contract Selection Date</td>
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Differences Between RHC Programs

• Different services funded: Telecom Program funds telecommunications services and HCF Program funds advanced telecommunications and information services for broadband connectivity.

• Different method of calculating discount: Telecom Program funds the difference between the urban and rural rates; HCF Program funds a flat 65%.
Overview

Request for Services Best Practices
RHC Program Application Process

1. Determine Eligibility
   - Must meet the three initial program criteria and make sure requested services are eligible

2. Develop Evaluation Criteria and Request Services
   - Develop scoring criteria to evaluate bids and describe service needs (posted on USAC website)

3. Evaluate Bids and Select a Service Provider
   - Choose the most "cost-effective" service provider

4. Submit Funding Request
   - Provide information about services and selected service provider

5. Certify Connection
   - Confirm service start and end dates

6. Invoice
   - Initiate invoicing process and submit to service provider for review (HCF Program)
   - Service provider submits invoice (Telecom Program)

Form 465
Form 460
Form 461

Form 466
Form 462
Form 467
Invoice

TELECOMMUNICATIONS (TELECOM) PROGRAM FORMS
HEALTHCARE CONNECT FUND (HCF) PROGRAM FORMS
Funding Year 2020 Calendar

February 1 - April 30
Initial Funding Request
Filing Window Period
FCC Form 466 or FCC Form 462

January 1
First day applicants may submit Requests for Services
FCC Form 465 or FCC Form 461 for FY2020

April 1*
Deadline for USAC posting of Request for Services
FCC Form 465 or FCC Form 461 for initial filing window period

July 1, 2020 through June 30, 2021
FUNDING YEAR 2020

October 28, 2021
Invoice deadline for FY2020 funding commitments which end on or before June 30, 2021

*Applicants should allow for processing time between their submission and USAC posting of the form by this day.
What is a Request for Services?

- After eligibility is approved, you (the HCP) completes an FCC Form 461 or 465 to let service providers know what types of telecommunications or broadband services you are looking for.

- Service providers use the information on the FCC Forms 461 and 465 to create a bid to provide those services.

- Request for Services Forms:
  - Telecommunications (Telecom) Program – **FCC Form 465** (Description of Services Requested and Certification Form)
  - Healthcare Connect Fund (HCF) Program – **FCC Form 461** (Request for Services Form)

- Approved Request for Services forms must be posted for a minimum of 28 days on the USAC public website.
  - Once a form is posted, the competitive bidding process begins.
What is a Request for Services?

• Once a Request for Services is posted, service providers have a minimum of 28 days to send their bids to the applicant
  • The HCP and service provider may not enter into an agreement to purchase services until the 28 days is over
  • After the 28 days is complete, the HCP and service provider are welcome to sign a contract, this day is called the **Allowable Contract Selection Date (ACSD)**.
FCC Report and Order 19-78

Request for Services Best Practices
FCC Report and Order 19-78

- Published in the Federal Register on October 11, 2019 and effective on November 12, 2019. Some of the adopted rule changes will not take effect until 2021.
- Takes action to promote transparency and predictability, and to further the efficient allocation of limited program resources while guarding against waste, fraud, and abuse.
- Does not affect FY2019 funding requests and applications.
- Read the Report and Order.
FCC Report and Order 19-78

• Adopts changes to every part of the application process.

• There are still two subprograms:
  • Healthcare Connect Fund (HCF) Program
  • Telecommunications (Telecom) Program

• Applicants will still be required to seek HCP eligibility determinations, submit requests for services (i.e., seek competitive bids), submit requests for funding, and submit invoicing forms.
FCC Report and Order 19-78 Resources

- FCC Report and Order 19-78 webpage summarizes the Report and Order’s major changes and includes the following resources:
  - FCC Report and Order 19-78 Tip Sheet
  - Webinar recording and slides
FCC Report and Order 19-78 Changes to Consider Now

• **Consortia Majority Rural Rule** – Every consortia in the HCF Program must consist of more than 50% rural sites starting in FY2020. Three-year grace period eliminated.

• **Consultant Registration** – USAC will issue a unique registration number to the consultant or outside expert and that number will be linked to the HCP’s organization.

• **Telecom Competitive Bidding** - Telecom Program applicants can use every competitive bidding exemption applicable to the HCF Program, except 10k exemption.
What about rurality tiers and prioritization of support?

• Based on the FCC Report and Order, all eligible HCPs will be assigned a rurality tier for purposes of prioritization.

• The RHC Program will continue to use the same definition of “rural area” under the FCC’s rules.
  • In the case where demand exceeds available funding, USAC will prioritize funding based on the assigned rurality tiers and those areas in a Medically Underserved Area/Population (MUA/P).

• Since the rural definition has not changed, health care providers (HCPs) currently approved as “rural” will retain their rural status.

• **The RHC Program will assign your rurality tier** – you do not have to do anything!
Public Notice DA 19-1253

- On December 10, 2019, the FCC released Public Notice DA 19-1253, providing guidance on the implementation schedule for reforms set forth by FCC Report and Order 19-78.

- As a result, certain reforms originally slated for FY2020 will now be implemented for FY2021.
Updates to Competitive Bidding Reforms

• Implementation Change From FY2020 to FY2021:
  • **Bid Evaluation**: HCPs must include details about minimum services needs and disqualification factors with their request for services.
  • **Site and Service Substitutions**: Telecom applicants will be allowed to submit site and service substitutions.
Questions?
Competitive Bidding

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 simultaneously help you 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.

• 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 Forms 461 and 465, and be based on the FCC's definition of “cost-effective.” (47 CFR 54.622(c)).

• In the HCF Program, cost must be a primary factor, but need not be the only primary factor. Although other factors may receive the same weight as cost, no single factor can receive a weight that is greater than cost (47 CFR 54.622(c)). Cost as a primary factor does not apply to Telecom Program requests for services.
## Example of Evaluation Criteria

### Block 5: Bid Evaluation

22  Select selection criteria (and weights assigned to each) that will be used to evaluate bids received as a result of this request for services. Attach supplemental information (if necessary).

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<th>Weight</th>
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<td>b. Technical Support</td>
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<td>c. Prior experience, including past performance</td>
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<td>d. Reliability of Service</td>
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<tr>
<td>e. Other (Single Point of Contact)</td>
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</table>
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 461 or Form 465 (for the purposes of competitive bidding) entirely and proceed directly to submitting a funding request.
Competitive Bidding Exemptions

- Under the HCF and Telecom Programs, you must meet one of the following criteria to be exempt from submitting the FCC Form 461 or Form 465 and participating in the competitive bidding process:
  - purchasing services 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);
  - has an active multi-year contract designated as “evergreen” for the RHC Program (exemption applies for the life of the contract); or is
  - using a consortium contract negotiated and approved under the Schools and Libraries (E-rate) Program.
- If you do not meet any of the exemptions above you must competitively bid for services and submit the FCC Form 461 or Form 465.
Additional Competitive Bidding Exemption – HCF Program

• Applicants seeking support for $10,000 or less of total undiscounted eligible expenses for a single year do not have to complete an FCC Form 461.
  • Applicants selecting this option cannot also request multi-year funding commitments.
  • Exemption does not apply to the Telecom Program.
Evergreen Contracts

• You are not required to file an FCC Form 461 or FCC Form 465 or competitively bid for the life of a multi-year contract designated as evergreen.

• 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.
Site and Service Substitutions – HCF Program

- Site and service substitutions allow you 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 though USAC-supported services or the service location may change over the course of the commitment.

- Approved commitments must have scalability language included in their Request for Services documentation and in any contract obtained through the competitive bidding process.

- 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- HCF Program

- HCF applicants 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 site is an eligible health care provider and the service is an eligible service under 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.
Service Providers and Competitive Bidding

• Service providers are prohibited from preparing, signing, or submitting an applicant’s FCC Forms 461 and 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.
Requests for Proposal – HCF Program Only

• 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.
• Per the HCF Order, you are required to submit an RFP if:
  • (A) it is required under applicable State, Tribal, or local procurement rules or regulations;
  • (B) the applicant 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 applicant is a consortium seeking support for participant-constructed and owned network facilities.
Requests for Proposal – HCF Program Only

• If you plan to issue an **RFP**, 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 which bids will be accepted (28 days or more);
  • Clearly delineated deliverables; and
  • The bid evaluation criteria, including the weight assigned to each criteria.
## Search Posted Services

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<th>Rural Health Care</th>
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<td>Submit Funding Requests</td>
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Search Posted Services
Search Posted Services

To search for requests for services, type the full or partial criteria in the appropriate box below.

The search results will show a summary of each HCP whose service request(s) match the search criteria entered, with options to view additional information. View more information about each HCP by clicking “Details” next to each HCP number. All supporting documentation will be available for download on this expanded view.

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Questions?
Submitting the FCC Form 461

Request for Services Best Practices
Select HCP

- Go to “My HCPs” tab in My Portal and select the HCP for which you would like to file an FCC Form 461.
Create FCC Form 461

- Once the HCP is selected, go to the “Form 460” tab and click “Create Form 461.”
Navigating the FCC Form 461
General Information

- Enter form friendly name (optional).

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<td>FCC Form 460 Number: 10</td>
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<td>Posting End Date:</td>
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<tr>
<td>Allowable Contract Selection Date (ACSD):</td>
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<tr>
<td>Form 461 Friendly Name:</td>
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</tbody>
</table>
General Information

- General information will prepopulate, as indicated by greyed-out lines.

1. Funding Year: 2016
2. HCP Number:
3. Site Name/Consortium Name: Hospital
4. Address Line 1:
5. Address Line 2:
6. County:
7. City:
8. State: IA
9. Zip Code: 51640
Individual HCP Site Request for Services

- Indicate if you are using an RFP, and upload.
- Enter number of posting days (minimum of 28 days).
Individual HCP Site Request for Services

- Enter in the information for the services you are requesting.
Individual HCP Site Request for Services

- Enter contact information.
Declaration of Assistance

- List contact information for any assistance received in preparing the FCC Form 461.
Bid Evaluation

- Select your bid evaluation criteria.
- No criteria may outweigh cost; the sum of all criteria must equal 100%.
Additional Documentation

- If you have a **Network Plan** or any additional documentation, upload here by clicking “New Document.”
Required Certifications

- All certifications must be checked.

Certifications

24. I certify under penalty of perjury that I am authorized to submit this request on behalf of the health care provider or consortium.

25. I declare under penalty of perjury that I have examined this form and attachments and to the best of my knowledge, information, and belief, all information contained in this form and in any attachments is true and correct.

26. I certify under penalty of perjury that the applicant has followed any applicable state, Tribal, or local procurement rules.

27. I certify under penalty of perjury that the supported connection(s) and network equipment will be used solely for purposes reasonably related to the provision of healthcare service or instruction that the health care provider is legally authorized to provide under the law of the state in which the connections are provided. In addition, I certify under penalty of perjury that the supported connection(s) and network equipment will not be sold, resold, or transferred in consideration for money or any other thing of value.

28. I certify under penalty of perjury that the applicant satisfies all of the requirements under section 254 of the Communications Act, 47 U.S.C. § 254, and applicable Commission rules.

29. I certify under penalty of perjury that the applicant has reviewed all applicable requirements for the program and will comply with those requirements.

30. I understand that all documentation associated with this form, including a copy of the signed 461, any bids/contracts resulting from the 461 posting, scoring sheet, and other information that was used in the decision making process, must be retained for a period of at least five years pursuant to 47 C.F.R. § 54.649, or as otherwise prescribed by the Commission's rules.
After Submitting

• You will receive an email confirmation that your form was submitted with a copy of the PDF form.

• Respond to Information Requests within 14 calendar days.
  • Failure to respond to the Information Request will result in a denial
  • Information requests will come from a reviewer using an @usac.org domain address
Consortium FCC Form 461

- When filing a consortium FCC Form 461, you should make sure the FCC Forms 460 and LOAs for all member sites have been approved before filing the consortium FCC Form 461.

- Once the FCC Form 461 is filed, you will not be able to link sites to that FCC Form 461 that are later added to the consortium.

- Additionally, numerous FCC Forms 461 will likely mean numerous ACSDs, which would increase the administrative burden associated with competitive bidding.

- Ensure all of your authorization documents are up to date (i.e., TPA/LOA)
Questions?
Submitting the FCC Form 465
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

- Enter the posting information for this service request.
Request for Services

- Identify anticipated applications and uses of the supported connection.

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<th>Category: Interactive</th>
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<tr>
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<td>Real-time remote examination, consultation, and/or monitoring</td>
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<tr>
<td>Video conferencing</td>
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<tr>
<td>Voice service</td>
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<td>Other (describe)</td>
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<td>Electronic patient billing</td>
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<td>Exchange of electronic health records</td>
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<td>Transmission of large files (e.g., X-ray images, MRI, etc.)</td>
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<td>Other (describe)</td>
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<td>Transmission of store and forward consultations</td>
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</tbody>
</table>
Services Drop Down Example

- When selecting a service from the categories, usage level and usage period will appear.
Bid Evaluation

- Add the bid evaluation criteria and weights.
- Select criteria from the drop down.
Declaration of Assistance

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

- All certifications must be checked and you must preview the form.
Preview FCC Form 465

- Must select “I have reviewed the form and have no changes.” to proceed.
Required Certification

Block 6: Certification

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 use 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
Required Certification

- Your signature is your My Portal password.
After Submitting

• You will receive an email confirmation that your form was submitted with a copy of the PDF form.

• Respond to Information Requests within 14 calendar days.
  • Failure to respond to the Information Request will result in a denial
  • Information requests will come from a reviewer using an @usac.org domain address
Questions?
Best Practices & Resources

Request for Services Best Practices
Best Practices: Communicating with Your Service Provider

• Ensure your service provider is aware of all the necessary documentation needed for future steps in the application process.
  • E.g. Urban/Rural Rate documentation (Telecom Program)
• Include language in your bid documentation that confirms your service provider will act in compliance with all RHC Program rules and FCC Orders.
• Include your service provider when you reply to Information Requests via email.
• All bid correspondence should be handled via email for audit purposes.
• HCPs are required to retain documentation for a period of five years.
Milestones to Apply for Funding for FY2020: HCF Program
Recommended Last Day to Submit for Individual HCPs NOT using a Request for Proposal (RFP)

<table>
<thead>
<tr>
<th>HCF Program Form</th>
<th>Last Day to Submit for Individual HCPs NOT using a Request for Proposal (RFP)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FCC Form 460 – Eligibility</td>
<td>February 10, 2020</td>
</tr>
<tr>
<td></td>
<td><strong>Recommended Date</strong></td>
</tr>
<tr>
<td>FCC Form 461 – Request for Services</td>
<td>March 12, 2020</td>
</tr>
<tr>
<td></td>
<td><strong>Recommended Date</strong></td>
</tr>
<tr>
<td>FCC Form 462 – Funding Request</td>
<td>April 30, 2020</td>
</tr>
<tr>
<td></td>
<td><strong>Deadline to Submit</strong>*</td>
</tr>
</tbody>
</table>

Please note that these dates (with the exception of the FCC Form 462 filing window deadline of April 30) are not mandatory deadlines, but rather recommended milestones to meet the close of the filing window.
Milestones to Apply for Funding for FY2020: HCF Program
Recommended Last Day to Submit for Individual HCPs USING a Request for Proposal (RFP)

<table>
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<tr>
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<th>Last Day to Submit for Individual HCPs USING a Request for Proposal (RFP)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FCC Form 460 – Eligibility</td>
<td>February 1, 2020 Recommended Date</td>
</tr>
<tr>
<td>FCC Form 461 – Request for Services</td>
<td>March 1, 2020 Recommended Date</td>
</tr>
<tr>
<td>FCC Form 462 – Funding Request</td>
<td>April 30, 2020 Deadline to Submit*</td>
</tr>
</tbody>
</table>

Please note that these dates (with the exception of the FCC Form 462 filing window deadline of April 30) are not mandatory deadlines, but rather recommended milestones to meet the close of the filing window.
**Milestones to Receive Funding for FY2020: Telecom Program**

<table>
<thead>
<tr>
<th>Telecom Program Form</th>
<th>Last Day to Submit</th>
</tr>
</thead>
<tbody>
<tr>
<td>FCC Form 465 – Eligibility &amp; Request for Services</td>
<td>March 12, 2020 Recommended Date</td>
</tr>
<tr>
<td>FCC Form 466 – Funding Request</td>
<td>April 30, 2020 Deadline to Submit*</td>
</tr>
</tbody>
</table>

Please note that these dates (with the exception of the FCC Form 462 filing window deadline of April 30) are not mandatory deadlines, but rather recommended milestones to meet the close of the filing window.
Learn

Welcome to RHC Learn! Here you will find all the handouts, training videos, and webinar recordings that will assist you in applying to the RHC Program. All events and resources are offered free of charge.

Upcoming Events

HCF Program Invoicing Best Practices for FY2018 Webinar – Thursday, November 14, 2019, 2:00 p.m. ET – Register now!

Request for Services Best Practices for FY2020 Webinar – Tuesday, December 10, 2019 2:00 p.m. ET – Register now!

Handouts and PDFs

RHC Program General Information

- RHC Program Brochure
Resources

- Competitive Bidding FAQs
- RFP Checklist (HCF Program only)
- Network Plan Checklist (HCF Program only)
- Search Posted Services
  - HCF Program
  - Telecom Program
- Subscribe to the RHC Monthly Newsletter
- Register for the Funding Request Best Practices for FY2020 webinars!
  - HCF Program (FCC Form 462) Best Practices – January 14 2:00 p.m. ET – Register now!
  - Telecom Program (FCC Form 466) Best Practices – January 16, 2:00 p.m. ET – Register now!
Questions?
Thank you for joining us today!

- RHC Help Desk
  - Call (800) 453-1546
  - Email RHC-Assist@usac.org

- Next Webinar - Funding Request Best Practices
  - January 16, 2020 2:00 p.m. ET
  - Register here!

- Please fill out the post-webinar survey!