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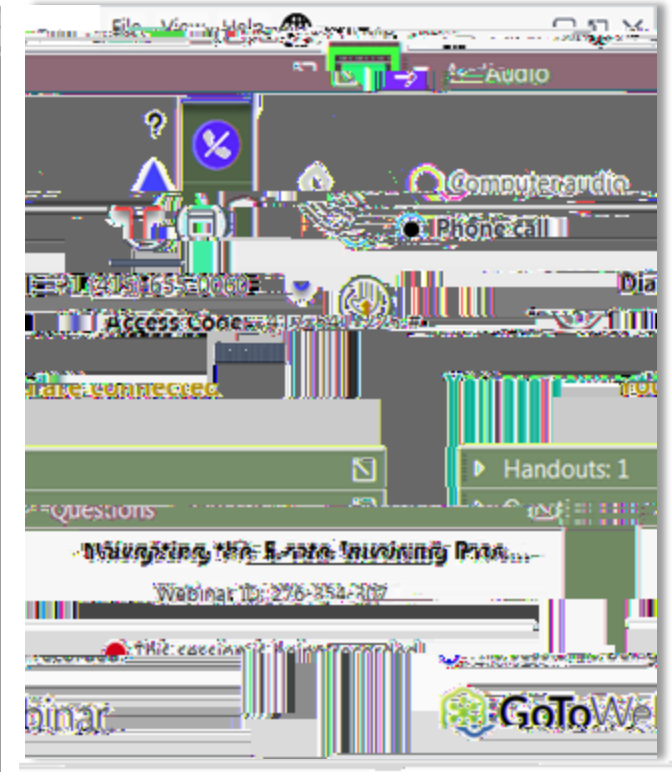
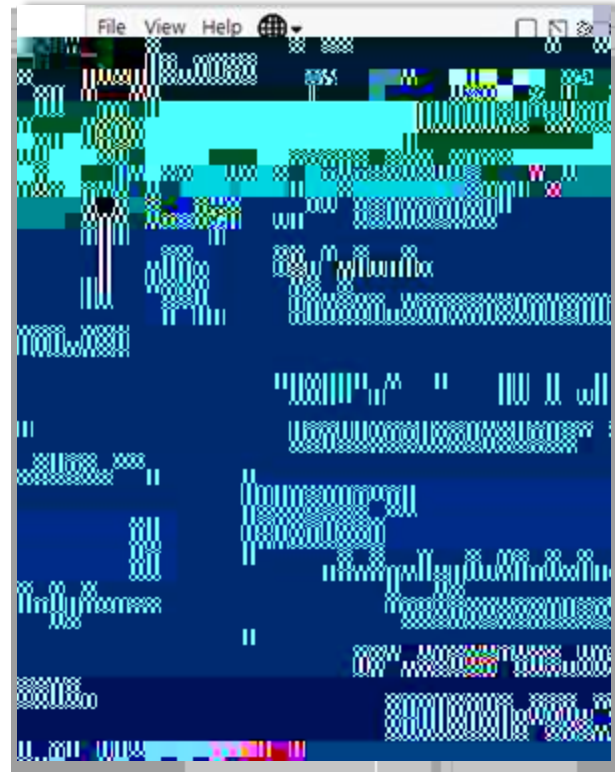


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Click the box with the arrow above the Questions

box to expand it

E-Rate Customer Service Center (CSC)



Call us at (888) 203-8100

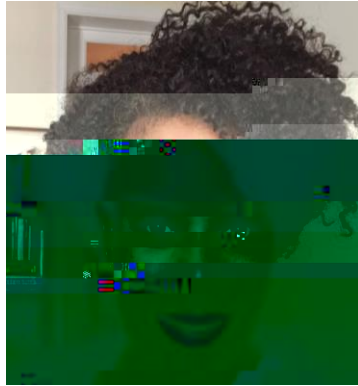
Monday – Friday 8 a.m. to 8 p.m. ET



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

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

MEET THE TEAM



Candice Hilliard

Outreach | E-Rate

Pamela Lloyd

Invoicing | E-Rate



Devent Carter

Post-Commitment | E-Rate

Prerequisites

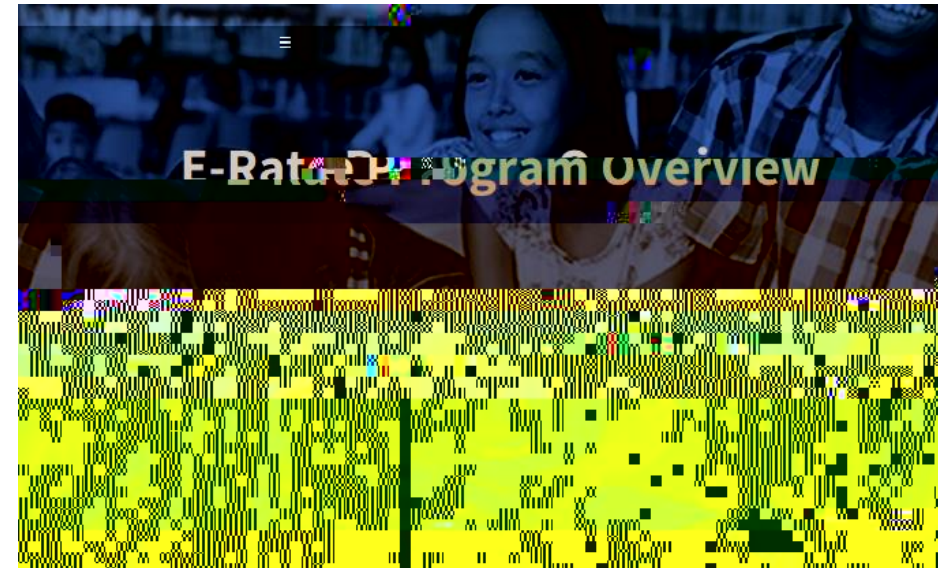
[E-Rate Program Overview](#)

E-Rate Eligible Entities

E-Rate Eligible Equipment
and Services

Application Process

Resources



E-Rate Overview

Obtain a Service Provider
Identification Number

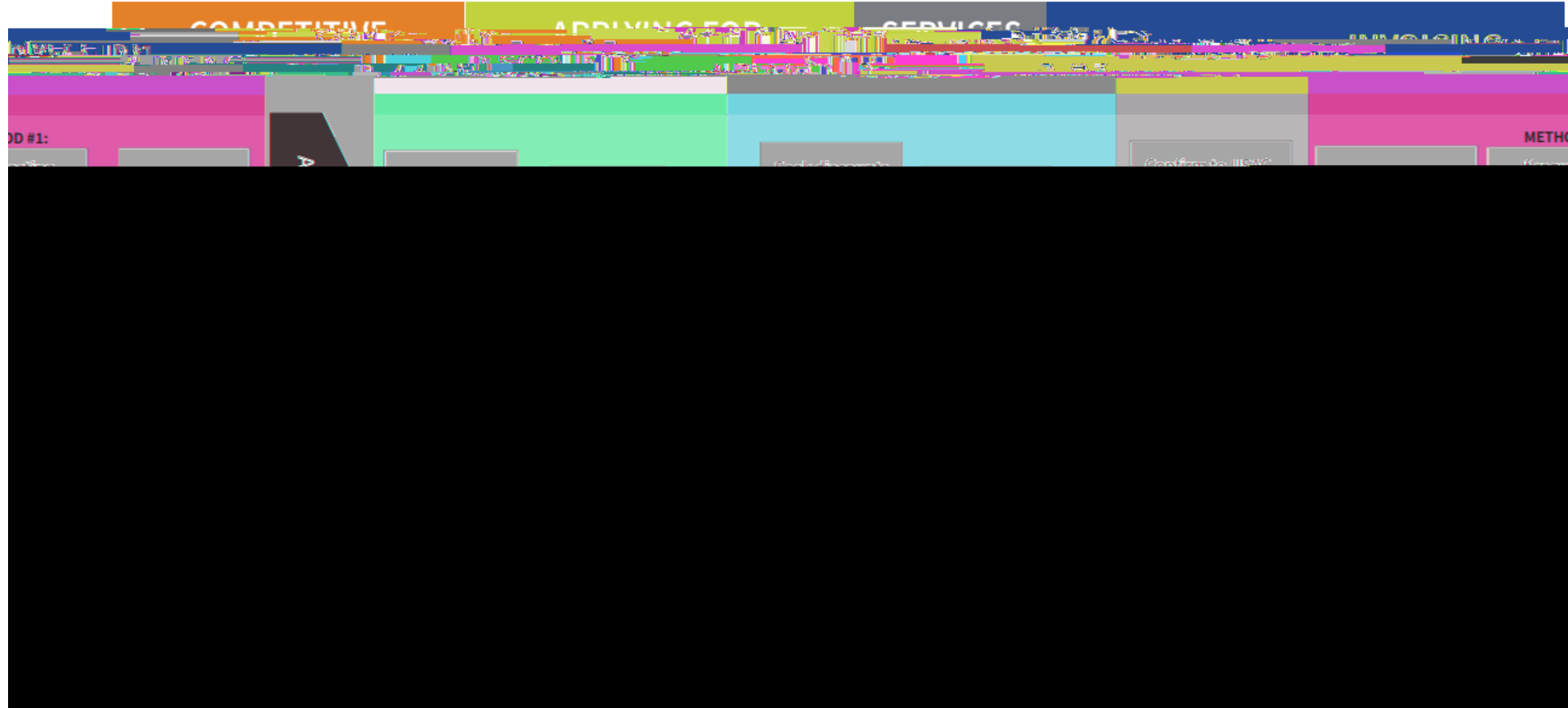
Bid on Projects

Assist the Applicant/Beneficiary

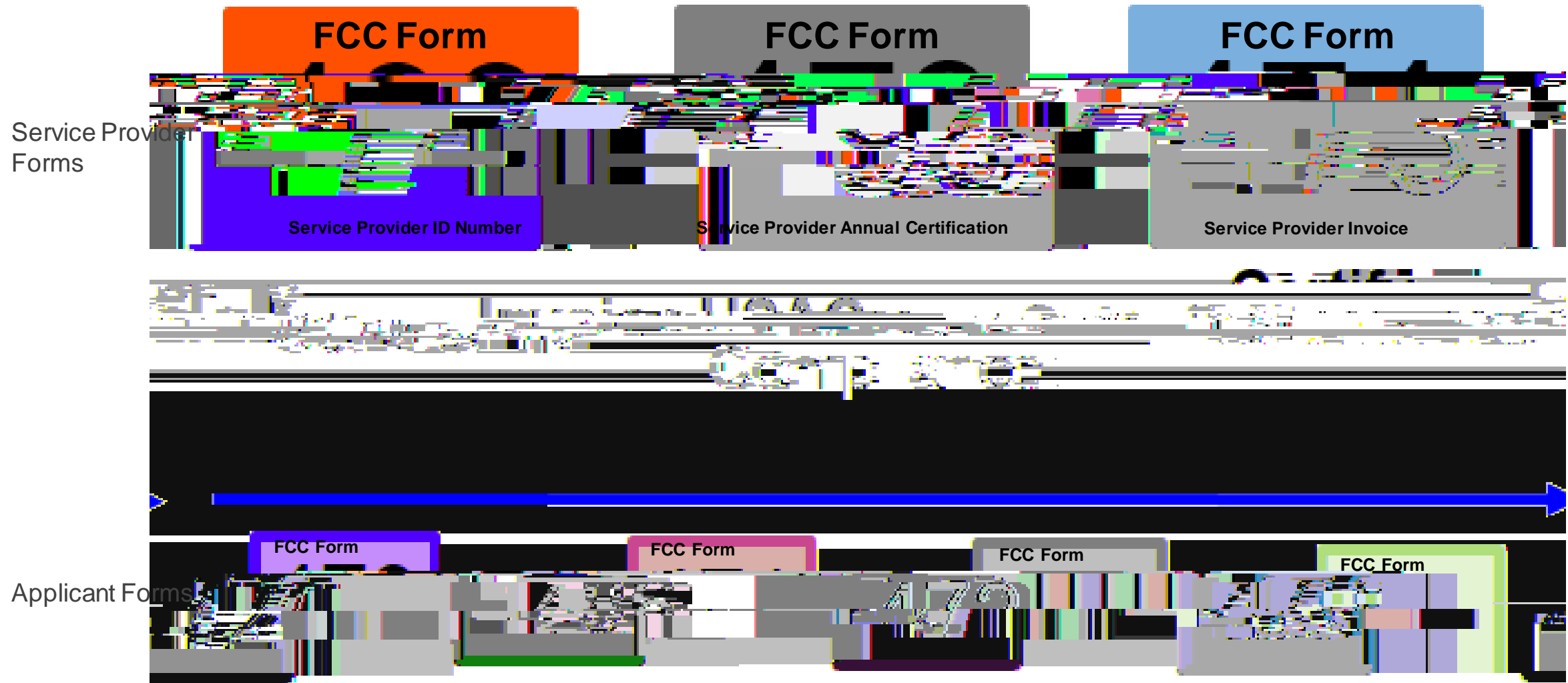
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E-Rate Overview

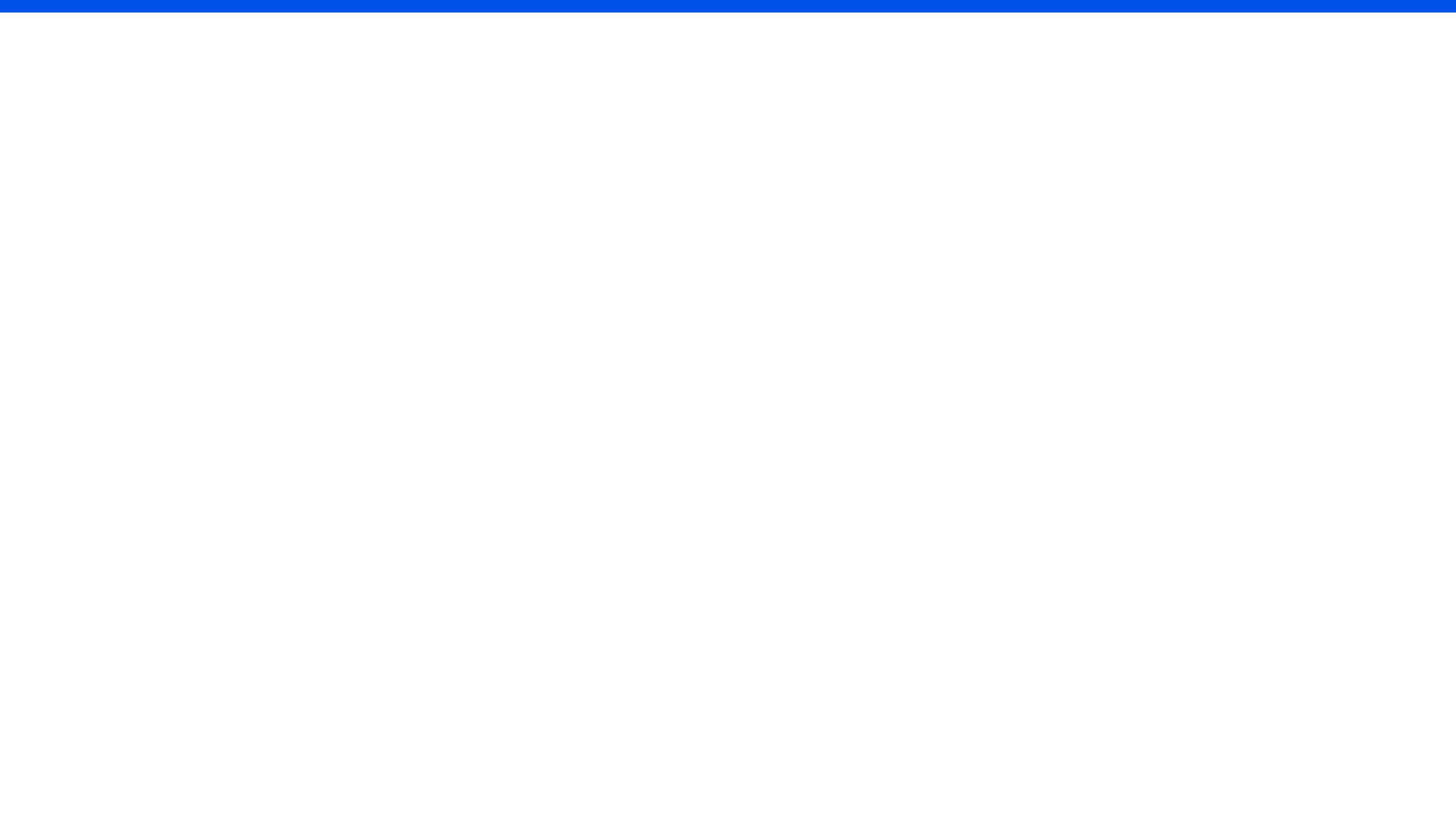
Process Overview



E-Rate Forms



Obtain a Service Provider Identification Number (SPIN)



Bid on Services

The applicant starts the [competitive bidding process](#) by posting one or more FCC Forms 470 and Requests for Proposal (RFP) documents, if applicable, to the USAC website.

These may include specific requirements for service providers to follow during the competitive bidding process.

Service providers [review the information and bid on the requested services](#).

The bid should include information on E-Rate eligibility percentage and category of service

The bid should be responsive to the services being requested.





How to Find Applicant Requests

Use the [View an FCC Form 470](#) Tool to find entities with needs in your service areas, and their points of contact.

You can also use our [Entity Information Tools](#) to narrow down your search to specific types of entities, including tribal entities or entities in underserved areas.



How to Find Applicant Requests

The screenshot shows a search interface for applicant requests. At the top, there is a dropdown menu for the year, currently set to 2023. Below this, there are two search criteria: "Applicant Type:" and "Applicant State:". The "Applicant Type:" dropdown is open, showing options "AL" and "AR". The "Applicant State:" dropdown is also open, showing options "Library" and "Library System". Below these, there is a "Service Type:" dropdown with options "Mission and/or Internet Access", "Connections", and "Internal Broadband Services". To the right, there is an "Applicant Zip:" dropdown with options "Data Trans", "Internal Co", and "Managed I". At the bottom of the form, there is a "Form Version:" field and an "Export to:" field. A note below the form states: "Note: This tool generates data up to 30 days of posting date." At the very bottom, there are "Search" and "Reset" buttons.

View an FCC Form 470 Tool – Search Results

Click on the hyperlink to open a form or an RFP document.

Library	TX	03/02/2023	2/2/2023 3:35:23 PM	Data Transmission and/or	Dublin Public
Library	230006087	03/02/2023	2/2/2023 3:35:23 PM	Data Transmission and/or	Dublin Public
Library	230006087	03/02/2023	2/2/2023 3:35:23 PM	Data T	

Find more detailed entity information

Use our FCC Form 470 tools within Open Data if you would like more detailed entity information, such as:

- Bureau of Indian Education affiliation



How Applicants Select a Service Provider

Applicants must wait at least 28 days after posting their FCC Form 470 and then they:

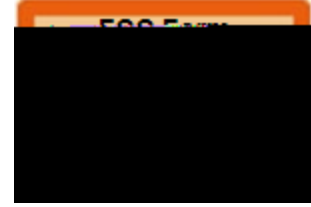
[Evaluate the bids received](#)

See [sample evaluation matrix](#)

Select a service provider on or after the 29th day

The day the applicant certifies the FCC Form 470 counts as day 1. For example, if they file and certify an FCC Form 470 on September 1, they may select a service provider on or after September 29.

The price of eligible products and services must be the primary selection criterion (weighted more heavily than any other single criterion).



How Applicants Select a Service Provider (Cont.)

Applicants must first [enter into an agreement](#) to provide services. If the applicant is required to wait more than 28 days due to their state or local procurement rules or regulations or competitive bidding requirements, they must follow those requirements.

Services can start on or after July 1. Be sure that eligible equipment and services are delivered to:

- The right recipient of service

- In the correct quantities and rates

Bid should include Lowest Corresponding Price

Service providers must charge the

Open and Fair Competitive Bidding

The [competitive bidding process](#) must be [open and fair](#).

“Open” means there are no secrets in the process. Information shared with one bidder must be shared with all. All bidders know what is required of them.

“Fair” means that all bidders are treated the same and that no bidder

Working With the Applicant

Understand Equipment and Service Eligibility

Each year, before the application filing window the FCC releases the [Eligible Services List](#), which contains general guidance on the equipment and services that are E-Rate eligible for the upcoming funding year.

The Eligible Services List also provides helpful information such as eligibility conditions for each category of service each funding year.

Applicants can only receive funding for eligible equipment and services that are being used for educational purposes.

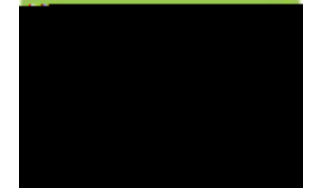
Equipment and services may be fully, partially or conditionally eligible.

Eligibility of equipment and services may vary from year to year.

After you have been selected, it is important to inform the applicant on the eligibility of your equipment and services, as well as to help them to categorize it accurately on their FCC Form 471.

If you have any question about eligibility of equipment and services, please contact us.

Check with the appropriate state agencies to see if your applicant must abide by a [State Master Contract](#).



Notify Applicant of any 'Mixed Eligibility' Issues

Mixed eligibility refers to products and services for which only a portion is eligible for discounts under the E-Rate program.

In general, a cost allocation, separating the eligible and ineligible costs, is required if a equipment or service:

- Contains both eligible and ineligible components (you should include in your bid what the percentage is, if it is not 100% eligible)

- Is utilized for eligible and ineligible uses – for example, a server that is used for both caching (eligible) and video distribution (ineligible)

- Is delivered to both eligible and ineligible locations – for example, broadband service delivered to a school run by a church (eligible) AND the church office (ineligible)

There is no single approved method to allocate eligible and ineligible costs. Your method must use tangible criteria that result in a reasonable allocation.

Allocate Costs for Mixed Eligibility

E-Rate funds may only be used to pay for eligible services and products used by eligible entities for eligible purposes (i.e., primarily educational purposes).

If a product or service has both eligible and ineligible functions, the cost of the ineligible functions must be allocated out of the funding request.

A cost allocation requires a clear delineation of costs.

Cost allocations must be supported by documentation.

The cost allocation must be based on a reasonable, tangible basis that reaches a realistic result.

Reminder: applicants are required to allocate services with ineligible sites or ineligible recipients of service.

Follow E-Rate Gift Rules

Receipt or solicitation of gifts by applicants from service providers or potential service providers (and vice versa) is a competitive bidding violation.

Service providers may not offer or provide any gifts or things of value to applicant personnel involved in E-Rate.

Gift prohibitions are always applicable, not just during the competitive bidding process.

FCC rules and any applicable state/local rules must be followed.

Retain Documentation

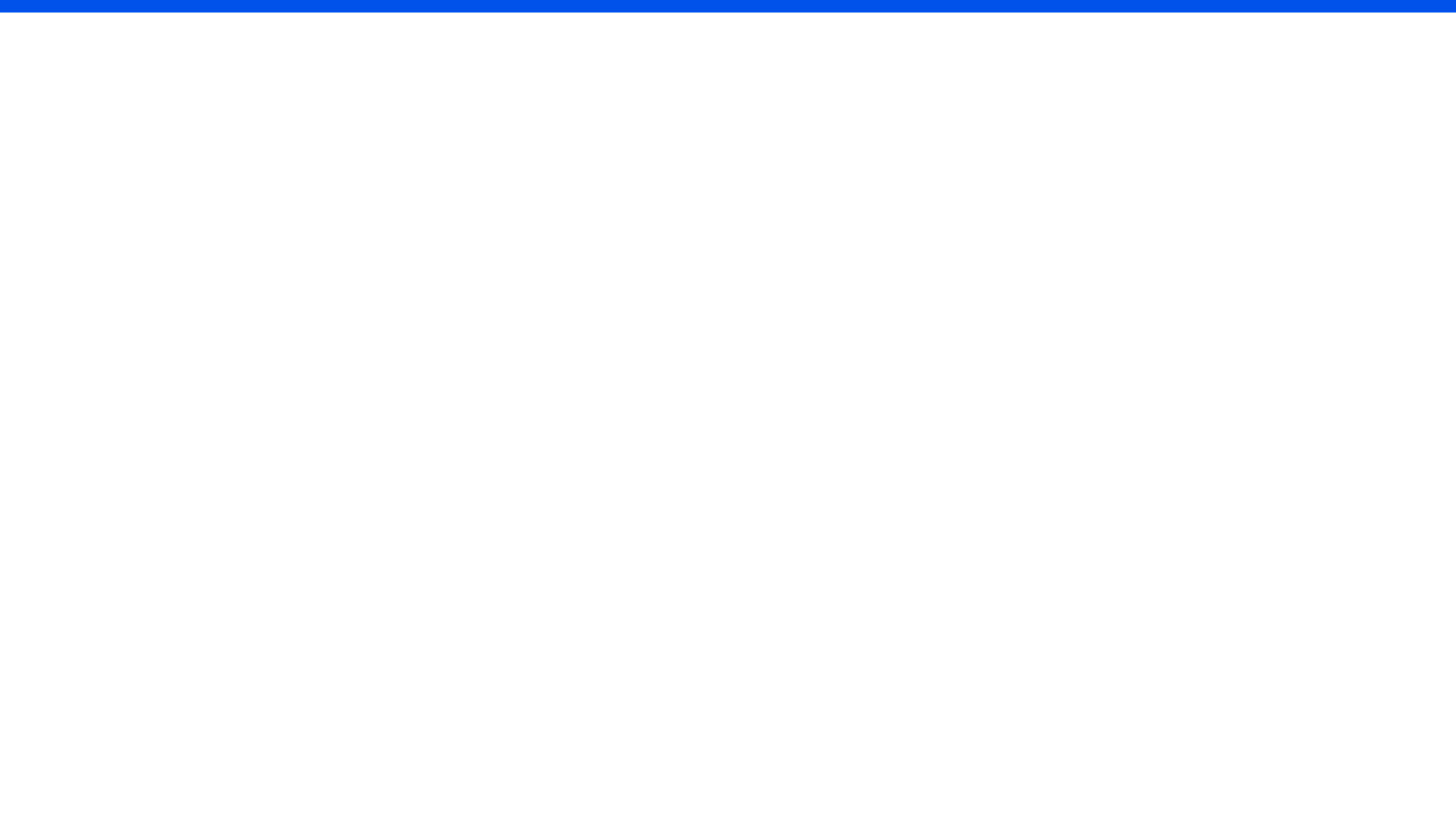
Applicants and service providers must [retain all documentation](#) for at least 10 years from the last date of service.

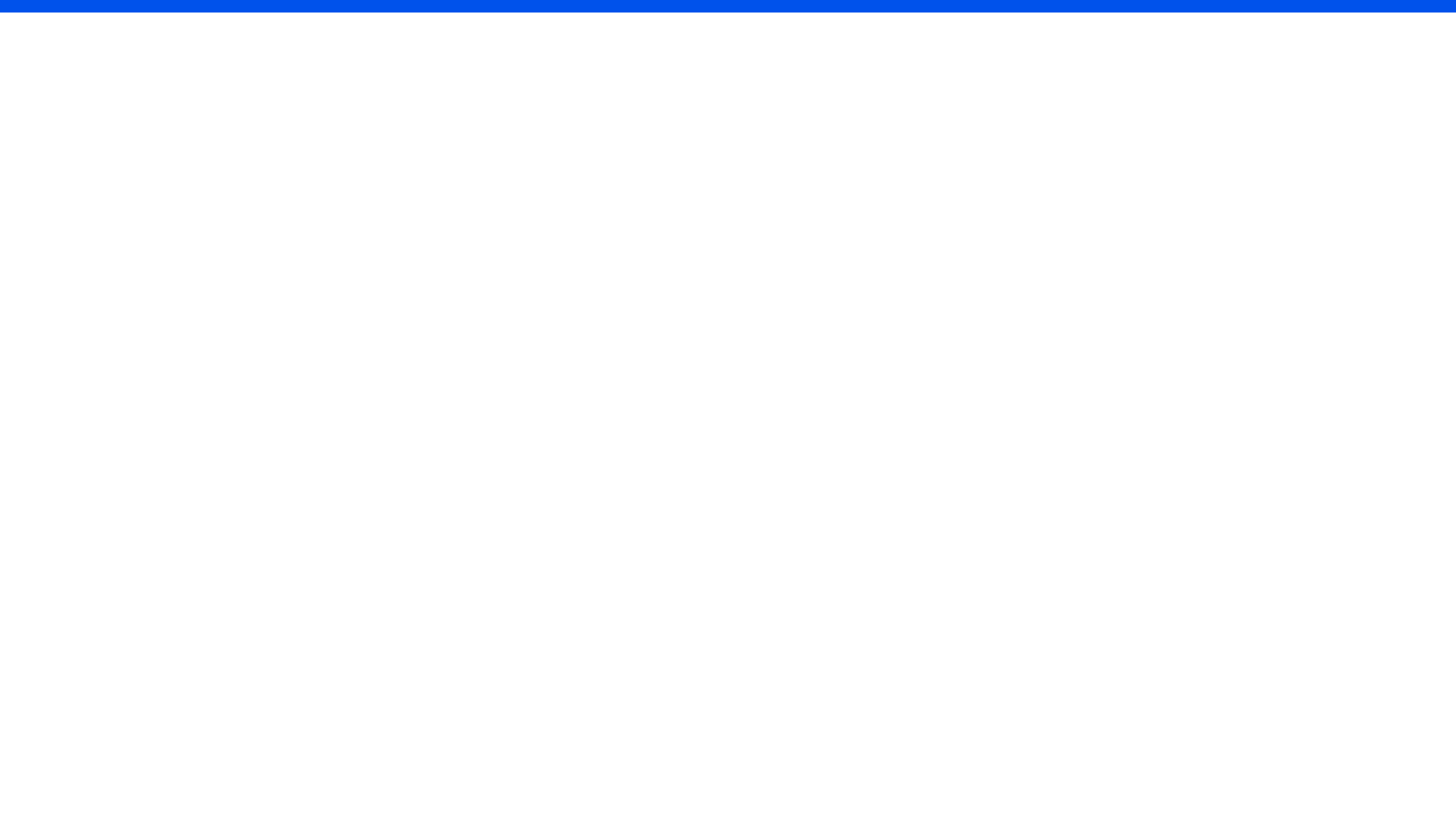
For example, for recurring internet access service for FY2023, both the applicant and the service provider must retain all records until at least June 30, 2034.

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.

Records can be kept electronically.









Invoicing Prerequisites

The applicant and service provider must have received a Funding Commitment Decision Letter (FCDL) with a positive commitment.

The applicant must have

Discuss with the applicant whether the applicant or service provider will file invoices. Have the BEAR/SPI discussion with the applicant.

Billed Entity Applicant Reimbursement (BEAR) invoicing: applicant invoices USAC.

Service Provider (SPI) invoicing: service provider invoices USAC.

This decision is made on a per-FRN basis and is the applicant's choice.

Once USAC processes an invoice for an FRN, the invoicing mode (BEAR or SPI) is set and cannot be changed without formal approval.

Make sure that you have the most recent commitment information from either theer the

Service Provider Invoicing

Service provider bills the applicant for any costs for ineligible portions/services and non-discounted share before submitting the FCC Form 474.

Applicant pays the service provider for ineligible portions/services and non-discount share.

Service provider invoices USAC for the discount amount using the FCC Form 474.

Invoiced amount must be actual charges, not the amount committed on the FCDL.

Only include [Eligible Services](#) on service provider invoices.



Applicants Must Pay Their Non-Discount Share

Regardless of which invoice method has been selected, all E-Rate applicants must pay their non-discount share. See the [Obligation to Pay](#) page on USAC's website.

Service providers cannot pay (directly or indirectly) for the applicant's non-discount share.

Funds cannot come from the service provider or an entity controlled by the service provider.

Service provider bills can't be ignored or waived.

If the applicant can't show proof of payment during invoice review, the invoice (whether from the applicant or the service provider) may be denied.

Use Our Invoicing Tools

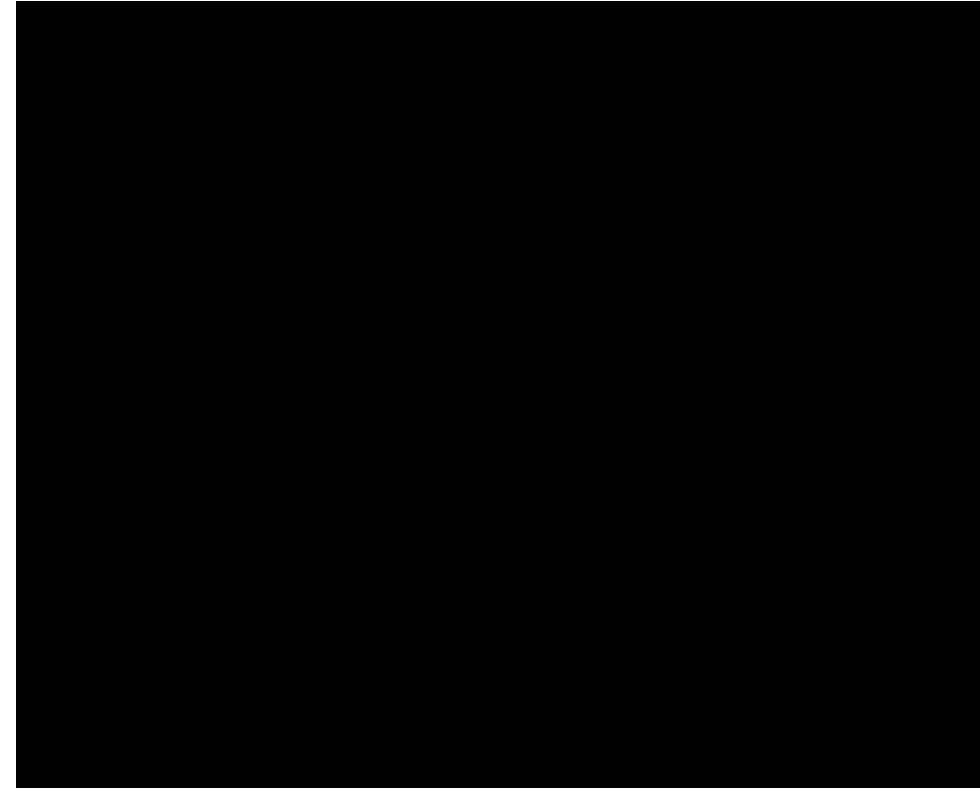
Use the [E-Rate FRN Invoicing Deadline Tool](#) to search Funding Request Number data

- Invoice deadline dates

- Which invoices are ready for invoicing

- Funds remaining for invoicing

- Invoicing Mode



Use Our Invoicing Tools

Use the [E-Rate Invoice Disbursements Data Lookup Tool](#) to find information on invoice line items.

Find out which submitted invoice lines are completed.

See how much funding was approved per line.

Learn why an invoice line was reduced or paid at zero.



Invoicing Reminders and Key Takeaways

Ensure your FCC Form 471 is accurate, including FRN, discount rate, approved cost of service, calculations and invoice amount.

Remove ineligible items (equipment and services not approved on FCC Form 471 for FY and ROS).

Respond to all outreach completely and in a timely manner to expedite your payment.

To prevent duplicate invoice submission, establish a process to track/identify each invoice.



Invoicing Reminders and Key Takeaways (Cont.)

BEAR Invoices: Applicant must have paid service provider in full and before invoicing E-Rate.

SPI Invoices: Applicant must pay the service provider their non-discounted portion. Service providers should bill their customers for:

- 1: the non-discounted portion of costs for the approved eligible equipment/services and
- 2: any costs for the ineligible portions of products/services before submitting the FCC Form 474.

Ensure you file for BMIC services correctly. Mistakes are often identified during invoicing. See our [FAQs](#) on how to fix misclassified equipment and services on your FCC Form 471.

Invoice USAC only for your FCC Form 471-approved eligible equipment and services, in the correct quantity and rates, and delivered only to the approved ROSs.

Ensure the speed is properly listed under the approved FRN. If you're using a flexible bandwidth speed, ensure you are using the min/max field on the FCC Form 471.

Invoiced amount must be actual charges, not the amount committed through the E-Rate program.

Check your manual calculations (e.g., your prorated amounts must be accurate).

Billed rates must not exceed the contracted rate. USAC will only pay up to the contracted rate.

Tips for Success

Follow all competitive bidding guidelines

Enter into a [legally binding agreement](#) before the applicant files FCC Form 471

Comply with the Lowest Corresponding Price (LCP) rule

Deliver equipment and services to the appropriate recipients of service

Ensure that the applicant has the necessary resources to use the service provided

Validate that internal connections are installed

Invoice for the correct amount

For more information, see the [Common Audit Findings Page](#) on USAC's website.

Resources

[E-Rate Service Provider Webpage](#)

[USAC Service Provider
\(Contributor\) Webpage](#)

[Open Data's E-Rate Datasets](#)

[E-Rate News Brief](#)

[E-Rate Learn Page](#)

E-Rate Video: [How to Search for
FCC Forms 470](#)

Questions?

Thank You!



