



# **E-Rate in FY 2016 and the E-Rate Modernization Orders**

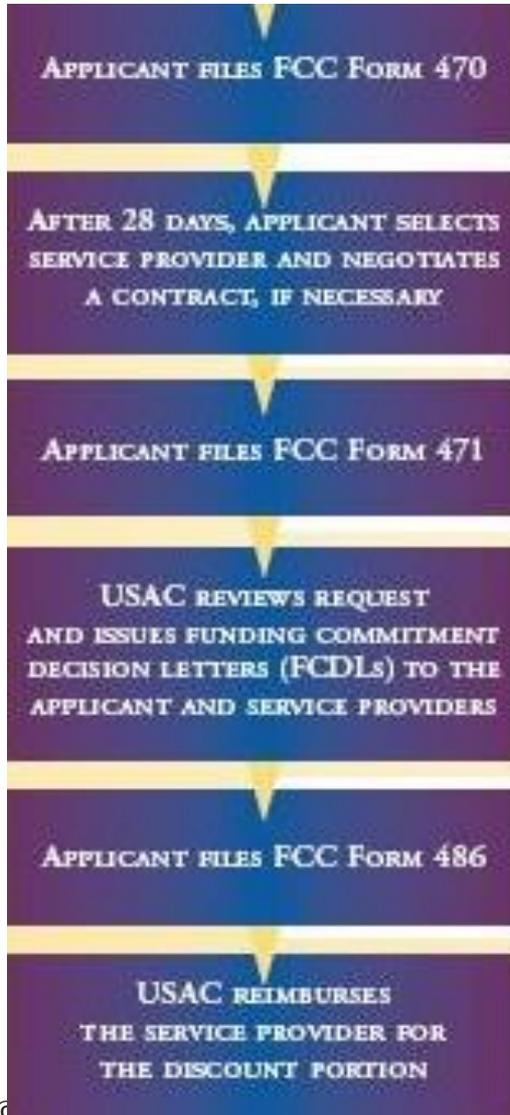
**E-Rate Training — December 2015**

**Presented by E-Rate Central**

[www.e-ratecentral.com](http://www.e-ratecentral.com)



- Basic E-rate application and invoicing cycle
- Introduction to the E-rate Modernization Orders
- Eligible Services List for FY 2016
  - Review of Category 1 changes as of FY 2015
  - New Category 1 fiber changes for FY 2016
  - Category 2 funding, eligibility, and budgets
- Review of discount rate changes
- NY-specific considerations
  - E-rate vs. SSBA funding
  - Eligibility of adult education facilities
- New E-rate Productivity Center (“EPC”)



## *Basic E-Rate Cycle*

1. File Form 470 (and RFPs)
2. Wait 28 days (vendor selection period)
3. File Form 471 (application)
4. PIA review and FCDL
5. File Form 486 (confirmation)
6. Submit invoices to USAC (BEAR or SPI)



## *Review of Modernization Orders*

- Refocus E-rate on broadband to the classroom
  - Set broadband goals for schools and libraries
  - Target “predictable” funding for internal Wi-Fi connections
    - Fund Wi-Fi by eliminating or phasing out support for Priority 1 “legacy” services
    - Increase E-rate funding cap by \$1.5 billion
- Update rules on competitive bidding, contracts, discount rates, electronic filing, technology plans, and more



## *Performance Goals*

- Affordable access to ConnectEd broadband goals
  - Schools: Internet at 100 Mbps per 1,000 students short-term and 1 Gbps per 1,000 students long-term
  - Libraries: Internet at 100 Mbps for populations under 50,000 and 1 Gbps for larger populations
  - WAN connectivity “scalable” to 10 Gbps
- Maximum cost-effectiveness of purchases
- ~~Fast, simple, and efficient E-rate process~~



## *Major Changes for FY 2016*

- New Category 1 fiber eligibility and funding
- All FY 2016 forms submitted through new EPC portal
  - Applicants (and consortium members) need fully functional EPC accounts
  - Form submission and certification are simultaneous
- New procurement requirements
  - RFPs uploaded with Form 470s
  - Category 1 fiber bids must meet strict procurement rules
- Direct payment on BEARs



# ***Eligible Services List for FY 2016***



## *New Category Designations*

- Old “Priority 1” and “Priority 2” designations dropped; new nomenclature will be:
  - **Category 1:** Services that enable Broadband connectivity *to* the school/library
  - **Category 2:** Services that enable Broadband connectivity *within* the school/library
- Targeted funding to be available for both C1 and C2



# ***Eliminate, Phase-Out, or Narrowly Define Support for "Legacy" Services***

## ***Category 1***



## *Ineligible Category 1 Services for FY 2015*

- Webhosting
- Paging, email, text messaging, and voice mail
- Telephone service components - directory assistance charges, custom calling services, direct inward dialing, 900/976 call blocking, and inside wire maintenance plans



## *Wireless Data Plans and Air Cards*

- Basically ineligible
  - Technically: Data plans and air cards for mobile devices will continue to be eligible for E-rate support **only** in instances where the school or library seeking support **demonstrates** that individual data plans are the most cost-effective option for providing internal broadband access for portable mobile devices at schools and libraries
  - Related Form 470 requires RFP



## *Voice Service Phase-Out*

- Applies to **all** voice services: Local phone service, long distance service, plain old telephone service (POTS), 800 service, satellite telephone, shared telephone service, Centrex, cellular voice, and interconnected VoIP
- Phase out schedule: 20 percentage points will be deducted from the eligible discount percentage each year beginning with FY 2015



## *Voice Service Phase-Out Table*

<b>Approved Discount % from Block 4</b>	<b>For FY2015</b>	<b>For FY2016</b>	<b>For FY2017</b>	<b>For FY2018</b>	<b>For FY2019</b>
<b>90</b>	<b>70%</b>	<b>50%</b>	<b>30%</b>	<b>10%</b>	<b>0</b>
<b>80</b>	<b>60%</b>	<b>40%</b>	<b>20%</b>	<b>0</b>	
<b>70</b>	<b>50%</b>	<b>30%</b>	<b>10%</b>	<b>0</b>	
<b>60</b>	<b>40%</b>	<b>20%</b>	<b>0</b>		
<b>50</b>	<b>30%</b>	<b>10%</b>	<b>0</b>		
<b>40</b>	<b>20%</b>	<b>0</b>			
<b>25</b>	<b>5%</b>	<b>0</b>			
<b>20</b>	<b>0</b>				

↳ minus 40%



## *Enhanced Fiber Eligibility under E-Rate 2.1*

- No amortization of installation charges on large projects
- “Modulating” electronics eligible as Category 1

### **As of FY 2016:**

- Special construction charges for dark fiber become eligible
- “Self-provisioned” fiber purchases become eligible, if...
- Installment payments for non-discounted installation charges
- Additional 10% funding available with state-matching



## *Enhanced Fiber Eligibility (cont'd)*

### **Cautions:**

- Bid evaluations for dark fiber, IRUs, and owned fiber must be compared with lit fiber solutions
- Bid evaluations must fairly compare all costs of alternatives
- Best practices indicate:
  - Complete RFPs
  - Sufficiently long bidding periods



# ***Support of Internal Connections***

## ***Category 2***



## *Category 2 Equipment & Services*

- Basic: Cabling, routers, switches, wireless access points
- At least through FY 2019:
  - Maintenance of basic LAN equipment
  - Managed Wi-Fi
  - Caching servers
- Newly ineligible:
  - All other servers
  - Telephone systems (including VoIP)



## *Category 2 Budgets*

- Each eligible school shall be eligible for support for Category 2 services up to a pre-discount price of \$150 per student over a five-year funding cycle
- Library Category 2 funds limited to \$2.30 per square foot (\$5.00 per square foot for large urban libraries)
- Minimum pre-discount funding per school or library is \$9,200
- Category 2 funding in any given year is not assured, but should be available at all (or most) discount levels
  - Major unknown: Category 1 demand for large fiber networks



## *Category 2 Budgets (cont'd)*

- Budget is per school or library summed over all applications
  - **Not** per district or library system
  - Existing school budgets may rise or fall over the five year period as student count changes. Budget cuts do not impact earlier funding
  - New schools may estimate the number of students, but shall repay any support provided in excess of the maximum budget based on student enrollment the following funding year
- Support is **not** available for Category 2 services provided to administrative buildings (“NIFs”)
  - But common equipment can be allocated to schools and libraries wherever it is located



## Category 2 Budgets (example)

- Red School District qualifies for 50% discount rate
- There are 1,000 students in total. The High School has 550 students, but 10 Middle school students take advanced classes there.

School	F/T & P/T Students x	Pre-discount Category Two Budget	Post-discount Category Two Budget
Red Elementary	100	100 x \$150 = \$15,000	\$15,000 x 50% = \$7,500
Red Middle School	300	300 x \$150 = \$45,000	\$45,000 x 50% = \$22,500
Mountain Top Elementary	50	50 x \$150 => \$9,200 (min.)	\$9,200 x 50% = \$4,600
Red High School	560	560 x \$150 = \$84,000	\$84,000 x 50% = \$42,000
District Office	0	\$0 (NIFs don't qualify)	\$0 (NIFs don't qualify)

- Totals: 1,000 students for discount rate purposes;
- 1,010 (effectively 1,021) students for Category 2 budget purposes



## Category 2 Budgets (example)

- Shared service allocation example – \$30,000 pre-discount cost for School A with 250 students, School B with 500 students, and School C with 750 students.

Straight line	Proportional by students	Specific (e.g., usage)
A = \$10,000	$A = 250/1500 \times \$30,000 = \$5,000$	A uses 30% = \$9,000
B = \$10,000	$B = 500/1500 \times \$30,000 = \$10,000$	B uses 15% = \$4,500
C = <u>\$10,000</u>	$C = 750/1500 \times \$30,000 = \underline{\$15,000}$	C uses 55% = <u>\$16,500</u>
\$30,000	\$30,000	\$30,000



## *Category 2 Budgets (cont'd)*

- Managing “over-budget” situations are critical
  - Separate FRNs for separate budget entities may be preferable
  - Include all eligible line items
  - Reduce pricing proportionally to stay within budget
  - Use “Narrative” to further explain requests
  
- 5-year budget cycle management
  - Cancel unused funding to free up budget(s) for future years
  - Begin 5-year cycle as early as possible



## ***Discount Rate Issues***



## Revised Discount Matrix

	Category one schools and libraries discount matrix		Category two schools and libraries discount matrix	
	Discount level		Discount level	
% of students eligible for National School Lunch Program	Urban discount	Rural discount	Urban discount	Rural discount
< 1.....	20	25	20	25
1-19.....	40	50	40	50
20-34.....	50	60	50	60
35-49.....	60	70	60	70
50-74.....	80	80	80	80
75-100.....	90	90	85	85



## *Discount Rate Calculations*

- Each school or group of schools in a school district must use the single district-wide “matrix” discount rate for **all** funding requests
  - An Educational Service Agency (“ESA”) applicant without its own schools determines its discount using all E-rate eligible students in schools that fall under the control of the central educational agency
  - Technical and special education schools are allowed to double-count students attending part-time with “snap-shot” counts
  - Private or charter schools, operating as a group under the same administration and finances, must use a single district-wide “matrix” discount rate for **all** funding requests (i.e., treated like a district)



## *Discount Rate Calculations (cont'd)*

- An individual library uses the eligibility percentage of the district where library is located
- All libraries in a library system must use the single system-wide “matrix” discount rate for **all** funding requests using the eligibility percentage of the district where the main branch of the library system is located
- School and/or library consortium applicants must average each member’s district-wide discount for each application



## *Consortium Discount*

- Based on simple average of member discounts
- Consortium is the only type of applicant that can have a non-matrix discount
- Consortium discount applies to all FRNs within an application
- USAC will prioritize application review for state and regional consortium applicants — already in effect for FY 2014
- Consortium membership LOAs must be in place **prior** to filing the Form 470



## *Community Eligibility Provision (CEP)*

- Districts and schools participating in the CEP will determine their discount percentage by using the same approach as that for NSLP eligibility under CEP, i.e., the percentage of direct certified children times the CEP Multiplier – presently 1.6 – not to exceed 100% student eligibility
- The CEP discount percentage – direct cert x 1.6 – may be used for up to 4 years
- If applicant adjusts its calculation of CEP, the change must be applied to its E-rate discount



## *Survey Method for Discount*

- Discount determination based **only on surveys received** in reference to total student population (no extrapolation allowed):
  - Example – 100 total students are all surveyed. Assume 60 surveys are returned – of those, 52 surveys indicate students are eligible for Free or Reduced lunch
    - Previously: 52 of 60 students eligible = 87% eligibility extrapolated to 100 students meant a 90% discount
    - As of FY 2014: 52 of 100 students eligible = 52% eligibility means an 80% discount



## *Urban – Rural Determination*

- Census data will be used for determining urban/rural status
  - “Urban clusters with populations under 25,000 are “rural”
- A district or library system with a majority of entities considered rural will receive the benefit of rural status
- USAC has posted a tool on its website to allow applicants to quickly find the urban/rural status of their entities
  - U/R tool may return “Invalid Address”



## *NY-Specific Considerations*

- E-rate vs. SSBA funding
  - Parallel connectivity goals (one of four SSBA categories)
  - SSBA funding can provide extra 10% for E-rate matching
  - Timing and planning issues
    - NYSED tech plan requirement
    - SSBA budget approval
    - SSBA funding reimbursement
- New NY Broadband Program for underserved areas
- New eligibility of adult education facilities



***USAC's New  
E-Rate Productivity Center ("EPC")***



## *EPC Required for All FY 2016 Activities*

- Accounts needed for all applicants, consultants, and service providers
- Initial setup required by primary organization contact
- Special BOCES (RIC) considerations
  - BOCES need district and consortium accounts
  - BOCES may need consultant accounts to help districts
  - Non-filing BOCES consortium members need accounts



## *Different Users Have Different Rights*

- Individual users identified by email address
- Account Administrator is the controlling user
- Full rights users can submit/certify forms
- Partial rights users can draft forms
  - “Save and Continue” vs. “Save & Share”
- View-only rights users can see only some information.
  - State coordinators have targeted view-only rights



## *E-Rate Forms Must Be Filed Through EPC*

- Posting and certification required together
  - Warning: Passwords need to be reset every 60 days
- EPC version of Form 470 available now
  - RFPs, if used and/or required, must be uploaded first
  - “Cardinal” change is an addendum issue
  - Form 470 tracking tools are terrible
- EPC version of Form 471 under development
  - Target is January 2016
  - Consortium discount rates determined by each member



## *Other Developments*

- Form 498 required for direct payments of BEARs
  - EPC version of Form 498 is available now
  - Hard cutover to EPC version of Form 472 (“BEAR”) is July 1, 2016
- EPC will have option to upload contracts
- EPC may have option/requirement to upload bids and assessments



## *Potential EPC Problems*

- EPC is under development and changing weekly
- Less than 50% of applicants have accounts
- Different users have different views and rights
- Lists are unmanageable and often unsearchable
- Terms of use agreement are limiting
  - Email addresses and passwords are not to be shared
  - Robotic access to data is prohibited
- System usage is not intuitive



# ***EPC on Tour***

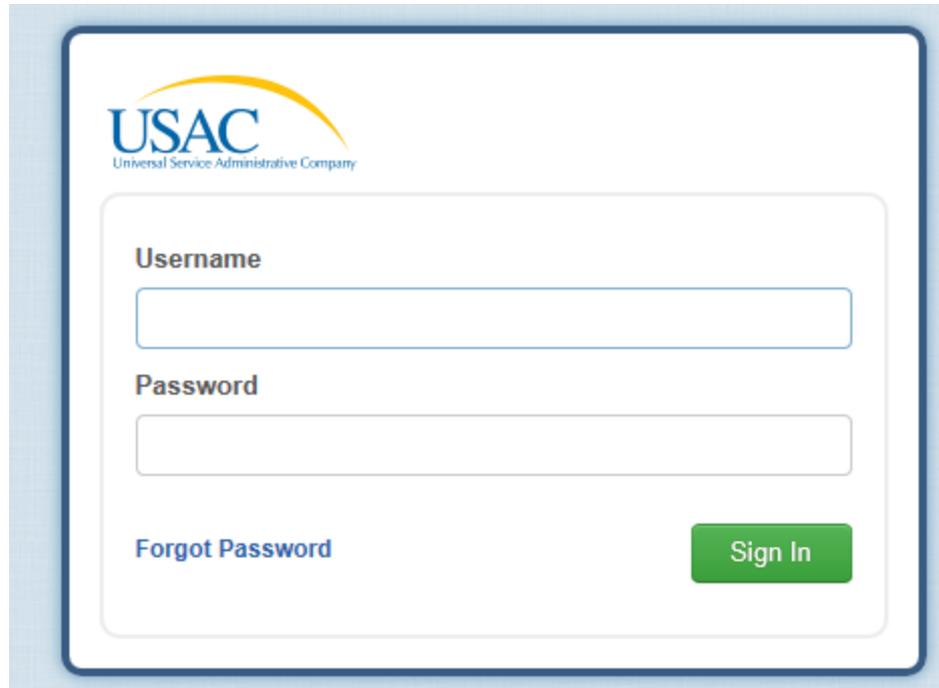


**USAC**  
Universal Service Administrative Company

You are accessing a Universal Service Administrative Company (USAC) system. This system is to be used to administer participation in the federal Universal Service Schools and Libraries support mechanism in compliance with 47 C.F.R. § 54, Subpart F. This system may be accessed by authorized users only. By logging in, the user represents that he/she is an authorized user. This system's usage may be monitored, recorded, read, searched, copied and/or captured and is also subject to audit. Unauthorized use or misuse of this system is strictly prohibited and subject to disciplinary and/or legal action, including criminal prosecution and civil penalties. Use of this system indicates acceptance of these terms. Additional terms (i.e., a user access agreement or contract) may govern your use of this system.

To accept these terms, click "I Agree."

[I Agree](#)

A screenshot of the USAC login interface. At the top left is the USAC logo, which includes a yellow arc above the text "USAC" and "Universal Service Administrative Company" below it. Below the logo are two input fields: the first is labeled "Username" and the second is labeled "Password". At the bottom left of the form is a link labeled "Forgot Password". At the bottom right is a green button labeled "Sign In".

**USAC**  
Universal Service Administrative Company

**Username**

**Password**

[Forgot Password](#)



## My Landing Page

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Welcome to the new EPC system, more functionality will be rolling out soon!

### Organizations

Organization	City	State	Zip Code	Type
School District 5	Springfield	NY	11413	Applicant
School District 5 School A	Springfield	NY	11413	Applicant
School District 5 School B	Springfield	NY	11413	Applicant
School District 5 NIF	Springfield	NY	11412	Applicant



### My Tasks

Name	Received	Status	Deadline
No items available			

### Customer Service Cases

Case ID	Topic	Nickname	Status	Date Created
No items available				

### FCC Forms 470

Funding Year

Status  All  
 Incomplete  
 Certified

Nickname	Application Number	Funding Year	Status
No items available			



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- Related Actions
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- Related Entities
- Consulting Firms
- Consortia Organizations
- Modifications
- FCC Forms 470

Records / Applicant Entities

# #112 - School District 5

Follow

[Create a New User](#)
[Add or Remove Existing...](#)
[Manage User Permissions](#)
...

## Organization Details

Name	School District 5	Applicant Type	School District
Entity Number	112	Status	Active
FCC Registration Number	0123123123		

## Contact Information

Physical Address	555 Main Street Springfield, NY 11413	Phone Number	555-555-1212
Mailing Address	555 Main Street Springfield, NY 11413	Email	school.district5.user1@mailinator.com
		Website URL	

## Account Administrator

Name	School District 5 User 1
------	--------------------------

## General Contact

Name	School District 5 User 1
------	--------------------------

## Applicant Attributes

School District Public  
 Sub-Type Private  
 Charter  
 ESA

State School Code  
 State LEA Code  
 NCES Public State Code  
 NCES Public District Code  
 NCES Public Building Code



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Records / Applicant Entities

## #112 - School District 5

Follow

Create a New User

Add or Remove Existing...

Manage User Permissions



- Manage Organization
- Modify Account Administrator
- Create a Customer Service Case
- Manage General Contact
- Manage Organization Relationships

### Organization Details

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Mailing Address	555 Main Street Springfield, NY 11413	Email	school.district5.user1@mailinator.com
		Website URL	

### Account Administrator

Name School District 5 User 1

### General Contact

Name School District 5 User 1

### Applicant Attributes

- School District Sub-Type
- Public
  - Private
  - Charter
  - ESA

State School Code

State LEA Code

NCES Public State Code

NCES Public District Code

NCES Public Building Code



Summary

News

**Related Actions ▶**

Customer Service Cases

Related Entities

Consulting Firms

Consortia Organizations

Modifications

FCC Forms 470

## Manage Organization Relationships

Please make a selection below to add or remove an organization relationship

**How would you like to manage your organization relationships?**

Remove a Relationship

Sign up for a Consortium

Add a Consulting Firm

Cancel





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School District 5	Springfield	NY	11413	Applicant
School District 5 School A	Springfield	NY	11413	Applicant
School District 5 School B	Springfield	NY	11413	Applicant
School District 5 NIF	Springfield	NY	11412	Applicant



### My Tasks



Name	Received	Status	Deadline
No items available			

### Customer Service Cases



Case ID	Topic	Nickname	Status	Date Created
No items available				

### FCC Forms 470



Funding Year

Status  All  
 Incomplete  
 Certified

Nickname	Application Number	Funding Year	Status
No items available			



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- Modifications
- FCC Forms 470

Records / Applicant Entities

## #113 - School District 5 School A Follow

Manage Organization

Manage Annexes

### Organization Details

<b>Name</b>	School District 5 School A	<b>Applicant Type</b>	School
<b>Entity Number</b>	113	<b>Status</b>	Active
<b>FCC Registration Number</b>	0123123123		

### Contact Information

<b>Physical Address</b>	100 South Main Street Springfield, NY 11413	<b>Phone Number</b>	555-555-1313
<b>Mailing Address</b>	100 South Main Street Springfield, NY 11413	<b>Email</b>	school.district5.user1@mailinator.com
		<b>Website URL</b>	

### Applicant Attributes ☰

<b>School Sub-Type</b>	<input checked="" type="checkbox"/> Public <input type="checkbox"/> Private <input checked="" type="checkbox"/> Pre-K <input type="checkbox"/> Head Start <input type="checkbox"/> Adult Education <input type="checkbox"/> Juvenile Justice <input type="checkbox"/> Dormitory <input type="checkbox"/> Charter <input type="checkbox"/> Tribal <input type="checkbox"/> New Construction <input type="checkbox"/> ESA	<b>Community Eligibility Program (CEP)?</b>	No
<b>Urban/Rural Status</b>	Not Found	<b>CEP Percentage</b>	
<b>Is this school part of a school district?</b>	Yes	<b>Number of Full Time Students</b>	123
<b>State School Code</b>		<b>Total Number of Part-Time Students</b>	0
<b>State LEA Code</b>		<b>Peak Number of Part-Time Students</b>	0
<b>NCES Public State Code</b>		<b>Total Number of Students Eligible for National School Lunch Program (NSLP)</b>	42
<b>NCES Public District Code</b>			
<b>NCES Public Building Code</b>			



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Alternate access points

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Alternate access point



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Manage Organization

Manage Annexes

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Entity Number	113	Status	Active
FCC Registration Number	0123123123		

### Contact Information

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Mailing Address	100 South Main Street Springfield, NY 11413	Email	school.district5.user1@mailinator.com
		Website URL	

### Applicant Attributes

School Sub-Type	<input checked="" type="checkbox"/> Public <input type="checkbox"/> Private <input checked="" type="checkbox"/> Pre-K <input type="checkbox"/> Head Start <input type="checkbox"/> Adult Education <input type="checkbox"/> Juvenile Justice <input type="checkbox"/> Dormitory <input type="checkbox"/> Charter <input type="checkbox"/> Tribal <input type="checkbox"/> New Construction <input type="checkbox"/> ESA	Community Eligibility Program (CEP)?	No
Urban/Rural Status	Not Found	CEP Percentage	
Is this school part of a school district?	Yes	Number of Full Time Students	123
State School Code		Total Number of Part-Time Students	0
State LEA Code		Peak Number of Part-Time Students	0
NCES Public State Code		Total Number of Students Eligible for National School Lunch Program (NSLP)	42
NCES Public District Code			
NCES Public Building Code			



Summary  
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Records / Applicant Entities

## #112 - School District 5 Follow



**Create a New User**

This function allows you to create a user for your entity.



**Add or Remove Existing Users**

This process allows user to add and remove users from an organization



**Manage User Permissions**

This function allows you manage the permissions for one or more users.



**Manage Organization**

This function allows you to update information about an entity or BEN.



**Modify Account Administrator**

This process allows you to transfer the Account Administrator function to another individual.



**Create a Customer Service Case**

This function allows you to submit a question about an E-rate form or topic. You can also submit a specific request or an attachment.



**Manage General Contact**

This function allows you to designate the general contact for your entity.



**Manage Organization Relationships**

Process to relate an Organization to another Organization



**Create FCC Form 470**

This function allows you to create an FCC Form 470 for your entity.



**Create FCC Form 498**

This function allows you to create an FCC Form 498 for your entity.



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### Customer Service Cases



Case ID	Topic	Nickname	Status	Date Created
No items available				

### FCC Forms 470



Funding Year

Status  All  
 Incomplete  
 Certified

Nickname	Application Number	Funding Year	Status
No items available			



## Create a Customer Service Case

### Case Details

Nickname \*

Description \*

Topic \*

Please select a value

Priority \*

Please select a value

Document

### Attachments

<input type="checkbox"/>	Attachment	Attachment Type
No items available		

[Find Attachment](#)

### Case Contact

Select Contact \*

- I would like to choose a user in the system
- I would like to enter in a contact that is not in the system



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School District 5 NIF	Springfield	NY	11412	Applicant



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Name	Received	Status	Deadline
No items available			

### Customer Service Cases



Case ID	Topic	Nickname	Status	Date Created
No items available				

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Funding Year

Status  All  
 Incomplete  
 Certified

Nickname	Application Number	Funding Year	Status
No items available			



## FCC Form 470 - Funding Year 2016

- Basic Information
- Service Requests
- Technical Contact Information
- Procurement Information
- FCC Form 470 Review
- Certifications & Signature

### Billed Entity Information



School District 5

555 Main Street

Springfield, NY 11413

555-555-1212

school.district5.user1@mailinator.com

Billed Entity Number: 112

FCC Registration Number: 0123123123

### Application Nickname

Please enter an application nickname here. \*

Discard Form

Save & Share

Save & Continue





## FCC Form 470 - Funding Year 2016

### School District 5 - 470 Example - Form #160000020

Last Saved: 10/28/2015 1:58 PM EDT

Basic Information

Service Requests

Technical Contact Information

Procurement Information

FCC Form 470 Review

Certifications & Signature

Next, you will describe the services you are requesting.

#### Add New Service Request

Function \*

Internet Access: ISP Service Only

Number of entities served? \*

5

Minimum Capacity \*

50 Mbps

Are you also seeking Installation, Activation and Initial Configuration for this service? \*

- Yes
- No

Maximum Capacity \*

100 Mbps

Are you also seeking Maintenance and Technical Support for this service? \*

- Yes
- No

Please select the RFP(s) that apply to this service request.

Sample RFP

Cancel

Add



## FCC Form 470 - Funding Year 2016

### School District 5 - 470 Example - Form #160000020

Last Saved: 10/28/2015 2:02 PM EDT

- Basic Information
- Service Requests**
- Technical Contact Information
- Procurement Information
- FCC Form 470 Review
- Certifications & Signature

Next, you will describe the services you are requesting.

#### Service Requests: Category One

Please enter the service requests below by selecting 'Add New Service Request'.

<input type="checkbox"/>	Service Type	Function	Minimum Capacity	Maximum Capacity	Entities	Quantity	Unit	Installation and Initial Configuration?	Maintenance and Technical Support?	Assoc RFPs
<input type="checkbox"/>	Internet Access and/or Telecommunications	Internet Access: ISP Service Only	50 Mbps	100 Mbps	5			Yes	No	Sampl

- Add New Service Request
- Edit Service Request
- Remove Service Request

#### Narrative

If you would like to provide further detail about the services sought, you may do so in this box below. Examples of such further detail include specific additional capacity levels that you are seeking, additional descriptions of the services bidders should be aware of or any disqualification factors.

Internet Access

If you are seeking bids for additional capacity tiers between the minimum and maximum, you must state which additional values.

#### Installment Payment Plan

Are you seeking an installment payment plan for the non-discounted portion of any special construction charges associated with the request(s) listed above? \*

- Yes
- No

- Back
- Discard Form
- Save & Share
- Save & Continue



## My Landing Page

[Apply Now](#) | [Manage Users](#) | [Manage Organizations](#) | [Contact Us](#) | [Help](#)



Welcome to the new EPC system, more functionality will be rolling out soon!

### Organizations

Organization	City	State	Zip Code	Type
School District 5	Springfield	NY	11413	Applicant
School District 5 School A	Springfield	NY	11413	Applicant
School District 5 School B	Springfield	NY	11413	Applicant
School District 5 NIF	Springfield	NY	11412	Applicant



### My Tasks



Name	Received	Status	Deadline
Create FCC Form 470	10/28/2015 1:00 PM EDT	Accepted	
Create FCC Form 470 - #160000020 - 470 Example	10/28/2015 2:07 PM EDT	Accepted	

### Customer Service Cases

Case ID	Topic	Nickname	Status	Date Created
No items available				

### FCC Forms 470



Funding Year:

Status:  All  Incomplete  Certified

Nickname	Application Number	Funding Year	Status
470 Example	160000020	2016	Incomplete



News Tasks (2) Records **Reports** Actions School District 5 User 1 - Appian

## My Landing Page

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School District 5 School B	Springfield	NY	11413	Applicant
School District 5 NIF	Springfield	NY	11412	Applicant



### My Tasks

Name	Received	Status	Deadline
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### Customer Service Cases

Case ID	Topic	Nickname	Status	Date Created
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### FCC Forms 470

Funding Year:  Status:  All  Incomplete  Certified

Nickname	Application Number	Funding Year	Status
470 Example	160000020	2016	Incomplete



News Tasks (2) Records Reports Actions School District 5 User 1 - Appian

Search news   
All >  
Updates  
Participating  
Starred ☆

Click here to post...

**USAC's Internal System** A new RFP document titled, ChatLog CSAB Admin Training\_ Assigning Users and Setting Permissions 2015\_01\_08 11\_27 associated with FCC Form 470 160000013 filed by School District 3 was uploaded into the EPC system on 10/21/2015 2:25 PM EDT. This document is available for download by clicking on the FCC Form 470 record link below and then clicking on 'View RFP documents'.  
[Test - #160000013](#) [#16030003 - School Di...](#)  
Oct 21, 2015 ☆ 🔒 Comment

**Welcome to the E-rate Productivity Center!** To begin using the EPC, please complete your account initiation tasks here: <https://portal-training.usac.org/suite/tempo/tasks/assignedtome>. If you have any issues, please contact [epcsupport@usac.org](mailto:epcsupport@usac.org)  
Oct 19, 2015 ☆ 🔒 Comment



News **Tasks (2)** Records Reports Actions School District 5 User 1 - Appian

**Assigned to Me** ▶  
Sent by Me  
Starred ☆

Status  
**Open** ×

Deadline  
Overdue  
Today  
Within 7 days

Click here to send a task... Newest ▾

- Me  
**Create FCC Form 470 - #160000020 - 470 Example**  
1 hour ago ☆
- Me  
**Create FCC Form 470**  
2 hours ago ☆



News   Tasks (2)   **Records**   Reports   Actions

School District 5 User 1 - Appian

All ▾

### Records

- [Applicant Entities](#)  
List of Applicant Entities
- [Consulting Firms](#)  
List of Consulting Firms
- [Customer Service Cases](#)  
List of Customer Service Cases
- [FCC Forms 470](#)  
List of FCC Forms 470
- [Knowledge Base Center](#)  
E-rate help with FAQs, guidance documents, and videos
- [Service Providers](#)  
List of Service Providers
- [Users](#)  
Directory of users
- [Whistleblower Cases](#)  
List of Whistleblower Cases



News Tasks (2) Records **Reports** Actions

School District 5 User 1 - Appian

 Search reports

All ▶

 **My Landing Page**  
Applicant landing page



News Tasks (2) Records Reports **Actions** School District 5 User 1 - Appian

**All ▾**  
Starred ☆

**Applications**  
EPC Customer Service (2)  
EPC Open Competitive Bidding (1)

- Contact Us** ☆  
Create a customer service case
- Create a Whistleblower Case** ☆  
Use this function to report an instance of program rule violations, or waste, fraud and abuse.
- Search and Export Certified FCC Forms 470** ☆  
This function allows you to search for certified FCC Forms 470 and export the results.



## ***Other Procedural Changes***



## *Invoice Filing Deadlines*

- FCC codifying existing invoice filing (BEAR & SPI) deadline process allowing applicants to request and automatically receive a single **one-time** 120-day extension of their invoicing deadline
  - Invoice deadline extension requests must be made **no later than** the existing initial deadline for filing BEAR or SPI requests
  - USAC not allowed to grant further invoice deadline extension requests
  - Waivers by the FCC may be granted only in extraordinary circumstances



## *Appeal Rules*

- All appeals of USAC decisions **must** be made to USAC as a first step before filing appeals with the FCC
- Applicants seeking **only** a waiver of the rules may address the waiver request directly to the FCC
- If in doubt, file with USAC first



## *Document Retention*

- The document retention period has been extended from five to **10 years** after the latter of the last day of the applicable funding year, or the service delivery deadline for the funding request
- Documents retained by EPC **does not** relieve applicants of retaining their own documents (but can help)
  - Submitted E-rate forms
  - RFPs (and bids?)
  - Contracts



## ***FY 2016 Will Be Challenging!***

- EPC is new and still under development
  - Use is neither easy nor intuitive
  - Many applicants do not yet have accounts
- New EPC-based Form 470 and Form 471
  - New RFP requirements — particularly for fiber
  - New discount rate issues for consortia
- New Form 498 required for direct BEAR payments



## *Additional Information*

Website: [www.usac.org/sl/](http://www.usac.org/sl/)

Portal: [portal.usac.org](http://portal.usac.org)



## E-Rate Central

Website: [www.e-ratecentral.com](http://www.e-ratecentral.com)

Newsletters: [www.e-ratecentral.com/subscribe.asp](http://www.e-ratecentral.com/subscribe.asp)

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