Fall FY2019 E-Rate Workshop

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Ohio | Department of Education

TRAINING AGENDA

- E-Rate Basics
- FY2019 Eligible Services
  - Installation Periods
  - Maximizing Category 2 Funding
  - Fiber Options
- Break
- EPC Fundamentals
  - Lunch
- Walk through the FCC Form 470 and Best Practices

E-Rate Basics

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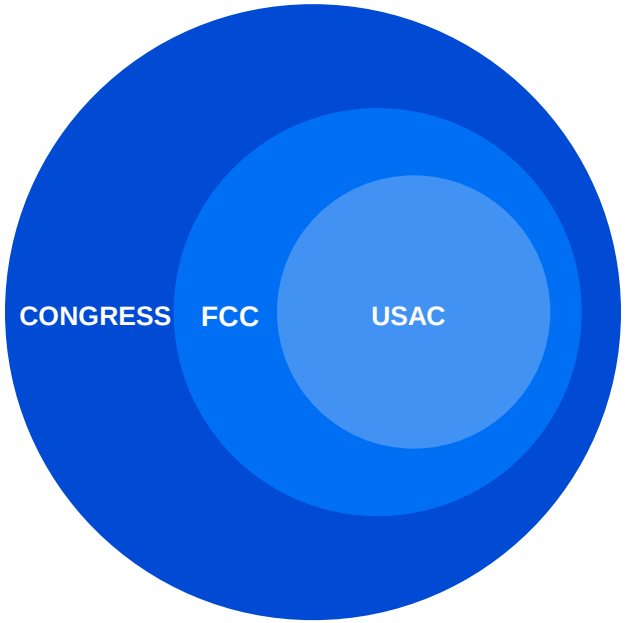
WHAT IS THE SCHOOLS AND LIBRARIES (E-Rate) PROGRAM?

Helps ensure that schools and libraries can obtain **high-speed Internet access** at an affordable rate

****Voice service is no longer available**

Keeps students and library patrons **connected to broadband** by providing a discount on eligible services

WHO MAKES THE RULES?



- Congress wrote the Telecommunications Act of 1996, which directed the Federal Communications Commission (FCC) to establish the E-Rate Program and other programs.
- The FCC issues orders that set rules and policies for the program and gives direction to the Universal Service Administrative Company (USAC) through orders.
- USAC is responsible for the day-to-day administration of the E-Rate Program.

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FUNDING YEAR

E-Rate funding commitments are made by funding year.

- A Funding Year (FY) starts on July 1 and ends the following June 30.
- USAC refers to the funding year as the year in which most services will begin.
    - For example, FY2019 starts on July 1, 2019, and ends on June 30, 2020.

ELIGIBILITY - Schools

- Must provide elementary and/or secondary education, as determined under state law.
  - Non-traditional facilities (**Special Needs Pre-K** and juvenile justice) are eligible in Ohio.
- Cannot have an endowment exceeding $50 million.
- Cannot operate as a for-profit business.

ELIGIBILITY - Libraries

- Must be eligible for assistance from their state library agency under LSTA*.
- Budget must be separate from any schools.
  - Bookmobiles and kiosks are eligible if they are considered library branches in their state.
- Cannot operate as a for-profit business.

* LSTA = Library Services and Technology Act

IDENTIFYING NUMBERS - BENs

Each applicant entity is assigned an “entity number” in the system.

- Each entity that receives and pays bills is assigned a Billed Entity Number (BEN).
  - This is not the same as an IRN
  - In a district or library system, the BEN is the “parent” organization
  - Each school or library under the “BEN” is assigned an entity number.
    - This includes “Non-Instructional Facilities” (NIFs) that provides support – Bus garage, maintenance building, admin building, etc.

IDENTIFYING NUMBERS - SPINs

A **Service Provider Identification Number (SPIN)** is assigned to providers participating in E-Rate.

- Service providers may have more than one SPIN due to:
  - Different business units or service areas.
  - Mergers and acquisitions.

WHAT PRODUCTS AND SERVICES ARE ELIGIBLE?

*Category One (C1)

*Provides connectivity to the building

Data Transmission Services and Internet Access

*Category Two (C2)

*Provides connectivity within the building

Internal Connections, Managed Internal Broadband Services, and Basic Maintenance of Internal Connections

ELIGIBILITY - Services

Category One (C1) services are not limited in cost as long as they are cost-effective.

Category Two (C2) services are limited by a pre-discount budget.

- Budget period is five years.
- Budget is calculated based on number of students (schools) or square footage (libraries).

ELIGIBILITY – Eligible Purposes

- Activities related to education that occur on school property.

- Activities related to providing library services to individuals that occur on library property.

***Activities that are not on school or library property are generally not considered eligible for discounts.**

ELIGIBLE PRODUCTS & SERVICES

- Every year, the FCC publishes the Eligible Services List, which governs the eligibility of products and services in the upcoming funding year.
  - FCC issues a Public Notice attaching a draft eligible services list and seeking comments on it
  - FCC reviews comments received, then issues an order with the final list
  - Some examples of products and services include:

CATEGORY ONE EXAMPLES	CATEGORY TWO EXAMPLES
Leased lit fiber	Access points
Ethernet	Switches
Multi-Protocol Label Switching (MPLS)	Routers
OC-1, OC-3, OC-12, OC-n	Supporting software used to distribute high-speed broadband
Satellite Service	Installation, activation, and initial configuration

E-RATE PRODUCTIVITY CENTER (EPC)

- EPC is the E-Rate account management and application portal for applicants, service providers and consultants.
- In EPC you can:
  - File most program forms
  - Maintain a list of your related entities (e.g. individual schools for districts, library branches for library systems, and consortium members for consortia)
  - Update your entity information (e.g. contact information and entity information such as student counts and square footage)
  - Add additional users on your organization's account and assign them rights (permissions) to file forms.

YOUR E-RATE DISCOUNT

- Discounts range from 20% to 90% for Category 1 services and from 20 to 85% for Category 2 services.
- Discounts are calculated using three pieces of information:
  - Poverty level
  - Urban or rural status
  - Service type

DISCOUNTS: YOUR POVERTY LEVEL

- Discounts are calculated for the school district or the library system (not for individual schools or library branch).
  - Schools that are members of school districts use their district's average.
  - An independent school or library: An independent school calculates its NSLP figures based on its own student population, and an individual library uses the NSLP figure for the school district in which it is located.
  - Library system members must use the NSLP calculation from the school district of the main branch's location.

DISCOUNTS: YOUR POVERTY LEVEL

- The E-Rate program uses the National School Lunch Program (NSLP) to determine poverty level.
  - Alternative Discount Mechanisms can also be used
- Discounts depend on the percentage of students who are eligible for NSLP.
  - Document student counts used to arrive at your total numbers for review and audit purposes.
    - ◇ How did you determined numbers for each school? (School A = CEP, School B = most current Site Claim Form, CN7 report, etc.)
    - ◇ Student counts displayed in the EPC Portal are based on counts used in the FY2018 Form 471.

NSLP Income Eligibility

- For the 2019 NSLP Income Eligibility Guidelines, go to https://www.fns.usda.gov/school-meals/fr-050818

INCOME ELIGIBILITY GUIDELINES
[Effective from July 1, 2018 to June 30, 2019]

Household size	Federal poverty guidelines	Reduced Price Meals—185%					Free Meals—130%				
	Annual	Annual	Monthly	Twice per month	Every two weeks	Weekly	Annual	Monthly	Twice per month	Every two weeks	Weekly
48 Contiguous States, District of Columbia, Guam, and Territories											
1	12,140	22,459	1,872	936	864	432	15,782	1,316	658	607	304
2	16,460	30,451	2,538	1,269	1,172	586	21,398	1,784	892	823	412
3	20,780	38,443	3,204	1,602	1,479	740	27,014	2,252	1,126	1,039	520
4	25,100	46,435	3,870	1,935	1,786	893	32,630	2,720	1,360	1,255	628
5	29,420	54,427	4,536	2,268	2,094	1,047	38,246	3,188	1,594	1,471	736
6	33,740	62,419	5,202	2,601	2,401	1,201	43,862	3,656	1,828	1,687	844
7	38,060	70,411	5,868	2,934	2,709	1,355	49,478	4,124	2,062	1,903	952
8	42,380	78,403	6,534	3,267	3,016	1,508	55,094	4,592	2,296	2,119	1,060
For each add'l family member, add	4,320	7,992	666	333	308	154	5,616	468	234	216	108

ADMIN WINDOW: UPDATING ENTITY INFORMATION

- The Admin Window is the period of time we update entity information in EPC
- Begins October 1st – closes several days prior to the opening of the Form 471 window.
- This includes:
  - Adding new buildings
  - Correcting addresses
  - Correcting student/NSLP data
  - Adding new users to the portal

Discount Calculations

Data from October 2018 MR-81 :

Sponsor Name	SiteIRN	Site Name	NSLP Provision	Enrollment	Free Lunch App.	Reduced Price Lunch App.	Free/ Reduce Total	Percent Free Lunch	Percent Reduced Price Lunch	% Free/ Reduced Price Lunch	CEP Eligible Students	Percent Direct Certified
Troy City SD	00016725	Hook Elementary School	Traditional	235	75	23	98	31.91%	9.79%	41.70%		
Troy City SD	00011924	Forest Elementary School	Traditional	254	125	25	150	49.21%	9.84%	59.06%		
Troy City SD	00019372	Kyle Elementary School	Community Eligibility Provision	265	-	-	0	-	-	71.25%	118	44.53%
Troy City SD	00007294	Cookson Elementary School	Traditional	289	133	20	153	46.02%	6.92%	52.94%		
Troy City SD	00015990	Heywood Elementary School	Community Eligibility Provision	322	-	-	0	-	-	69.57%	140	43.48%
Troy City SD	00066498	Van Cleve Elementary School	Traditional	361	113	24	137	31.30%	6.65%	37.95%		
Troy City SD	00007161	Concord Elementary School	Traditional	541	65	8	73	12.01%	1.48%	13.49%		
Troy City SD	00065292	Troy Junior High School	Traditional	703	209	48	257	29.73%	6.83%	36.56%		
Troy City SD	00037598	Troy High School	Traditional	1,427	355	60	415	24.88%	4.20%	29.08%		

Alternative Discount Mechanisms

Community Eligibility Provision (CEP)

- Nationwide program to reduce NSLP paperwork burden.
- Schools must have at least 40% of their students directly certified to qualify for CEP.
- All students eat free, but this does not mean they are counted as eligible for E-Rate purposes. Must still determine eligibility percentage.
- Schools apply national multiplier (1.6) to directly certified population to determine NSLP eligible population.
- Schools are capped at 100% NSLP eligible for purposes of determining the E-Rate discount.

DISCOUNTS: URBAN OR RURAL STATUS

- Urban or rural status is based on 2010 census data.
- Check your status on USAC's website.
- School districts are considered rural if more than 50% of its schools are rural.
- Library systems are considered rural if more than 50% of its branches are rural.

DISCOUNTS: CATEGORIES OF SERVICE

CATEGORY ONE

UP TO 90%

CATEGORY TWO

UP TO 85%

	Category One Discount Levels		Category Two Discount Levels	
INCOME *% of students eligible for NSLP*	**URBAN** DISCOUNT	**RURAL** DISCOUNT	**URBAN** DISCOUNT	**RURAL** DISCOUNT
Less than 1%	20%	25%	20%	25%
1% to 19%	40%	50%	40%	50%
20% to 34%	50%	60%	50%	60%
35% to 49%	60%	70%	60%	70%
50% to 74%	80%	80%	80%	80%
75% to 100%	90%	**90%**	85%	**85%**

FIVE-YEAR CATEGORY TWO (C2) BUDGETS

- USAC calculates a C2 budget for each individual school.
  - The budget for one entity cannot be shared with other entities in a consortium, district, or system.
- The school can receive discounts on the cost of C2 services up to its C2 budget amount. It can:
  - Spend the budget over a five-year period,
  - Use the entire budget in one funding year,
  - Allocate over five different funding years,
  - Spend the budget on one, two, or all three of the C2 service types.

Please note: there is no fixed budget for Category 1 funding

HOW LONG WILL C2 FUNDING BE AVAILABLE?

The answer is…we're unsure

- The FCC implemented C2 funding beginning in FY2015 as part of the E-Rate Modernization Order
- The FCC rules say that the C2 budgets are for 5-years, based on the first year that any school in the district was committed C2 funding.
- However, there is also language indicating that C2 funding is only available through FY 2019, after which it will sunset unless the FCC takes action.
- That's why I strongly encourage all schools to consider their internal connections needs, and utilize their C2 budgets in FY2019, if the program in it's current form is not extended.
- **If you received C2 in FY2015, FY2019 is your 5th year!!**

FIVE-YEAR CATEGORY TWO (C2) BUDGETS

- The C2 budget is re-calculated every year.
  - More students in a school results in a budget increase.
  - Fewer students in a school results in a budget decrease.
    - If the C2 budget decreases below funding already spent for the five-year period, the school does not have to reimburse USAC for the discount on the difference between the budget and the pre-discount amount.
- The C2 budget multiplier is adjusted each year for inflation.

WHAT'S MY FIVE-YEAR C2 BUDGET? (All figures are for FY2018)

- **Pre-discount budget** calculations are based on the number of students.
  - ◇ Total students (including peak part-time) x $156.23
- Minimum budget of $9,582.23
  - If the budget calculation results in a value less than $9,582.23, the school's pre-discount budget is set at the minimum budget
- Remaining C2 Budget = (Pre-discount budget) – (Pre-discount amounts committed in prior funding years)

C2 BUDGET EXAMPLES

Example #1 – School

Formula:
students x **$156.23** =

Five-year pre-discount C2 budget

Total number of students: 500

Calculation of C2 **pre-discount** budget :
500 students x $156.23 = $78,115

The school then subtracts any pre-discount C2 funding requests from FY2015 - FY2018.

If the school requested support for $30,000 in C2 services in FY2016 and $10,000 in FY2015 (totaling $40,000 pre-discount), the remaining balance would be **$38,115.**

C2 BUDGET EXAMPLES

Example #2 - Library (using FY2017 numbers)

Formula:
Internal ft^2 x **$2.39** = FY2018 five-year C2 pre-discount budget

Total internal square footage: 10,000

FY2018 Multiplier: $2.39

Calculation:
FY2018 calculation: 10,000 square feet x $2.39 = $23,900 **pre-discount**

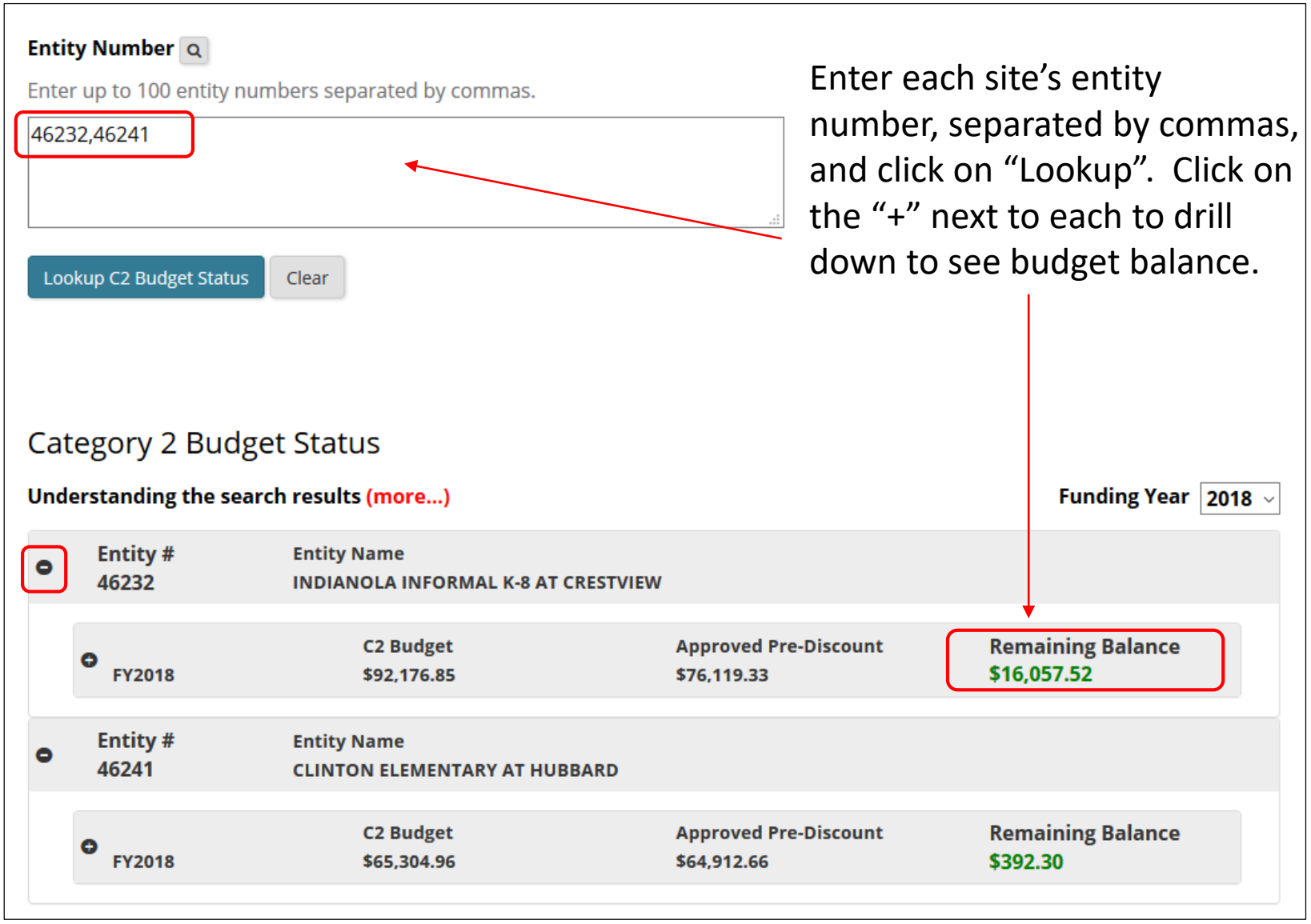
The library then subtracts any pre-discount C2 funding requests from FY2015 - FY2018.

If the library requested $0 in FY2016 and $5,000 in FY2015 ($5,000 pre-discount), the FY2019 remaining balance would be **$18,900**.

OTHER CATEGORY 2 BUDGET INFORMATION

- NIFs are school buildings with no classrooms or library buildings not open to the public (e.g., administrative buildings). **NIFs do not have C2 budgets**.
  - If the NIF is essential for the transport of the services to a school or library, the entities benefiting from the services must allocate the costs from their budgets.
  - If the NIF receives services for itself, those costs must be allocated out of the funding request.
- Check the Category Two Budget Tool, using your entity numbers, on the USAC Tools website. (Not the one listed in the EPC portal
  - Applicants can return unused committed funds from prior funding years using the FCC Form 500.

CATEGORY 2 BUDGET TOOL



What Is the Application Process?

Competitive Bidding

470

- Run an open and fair competitive bidding process.
- Wait 28 days before choosing a service provider.
- Evaluate bids using the price of the eligible services as the primary factor.

Apply for Discounts

471

- Provide information about your requests (discount level, costs of services, service providers).
- Answer USAC review questions.
- Receive your funding commitment decision.

Start Services

486

- Tell USAC your services have started.
- Verify your CIPA* compliance.
- Answer USAC review questions.

* CIPA = Children's Internet Protection Act

Invoice USAC (BEAR Form) 472

- **File on USAC's legacy system, not in EPC**
- Pay your customer bill (the bill from your service provider) in full.
- Answer any USAC review questions.

Invoice USAC (SPI Form)

474

- Pay your discounted customer bill (the bill from your service provider).
- Your service provider will invoice USAC for the discount amount.
- Answer any USAC review questions.

MORE ABOUT FCC FORM 470

- The FCC Form 470 opens the competitive bidding process and notifies potential bidders of the types and quantities of services that you need:
  - Posted to the USAC website
  - Potential vendors review forms and submit bids to you
- Only an authorized representative of the applicant can prepare, sign, or submit the FCC Form 470

REQUESTS FOR PROPOSALS (RFPs)

- Requests for Proposals (RFPs) may be created to describe specific needs and circumstances in more detail.
  - We use “RFP” and “RFP document” generically to refer to any supplemental document that helps to describe the requested services or provides more information that is not in the FCC Form 470.
  - For most types of funding requests, you are not required to issue an RFP unless your state or local procurement rules or regulations require it.
  - If you issue an RFP and/or an RFP document, all of these documents must be attached to the FCC Form 470 you submit in EPC.

FCC FORM 470 RESPONSE LETTER

- After posting FCC Form 470, USAC will issue a letter called the Receipt Notification Letter (RNL).
  - The RNL summarizes the information provided in the FCC Form 470.
  - The RNL is posted to your E-Rate Productivity Center (EPC) account “News” feed.
- Carefully review the letter.
  - If you notice mistakes on your form you can submit corrections.
  - Navigate to the form in EPC, and choose “Related Actions” to submit allowable corrections.

FCC FORM 470 EXEMPTIONS

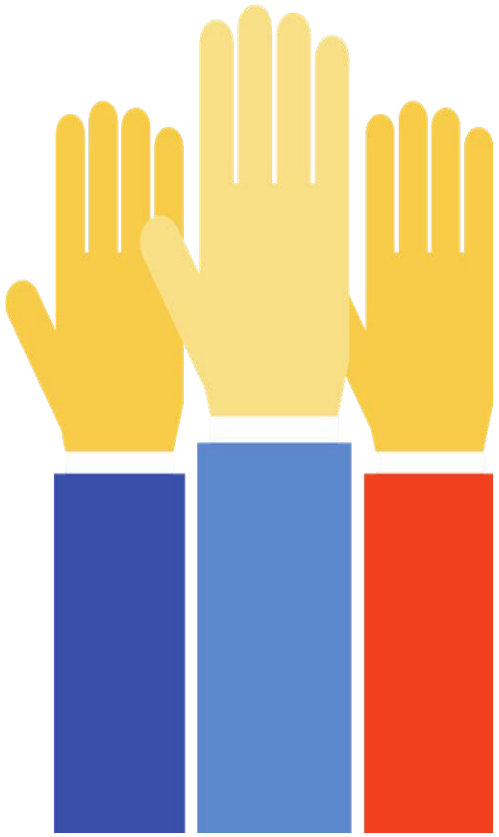
- Not everyone is required to file an FCC Form 470
  - Multi-year contracts
    - ◇ You do not need to file a new FCC Form 470 if the contract is still in effect and the costs/services are still within the terms of the establishing FCC Form 470.
    - ◇ **NOTE: You do still need to file a new FCC Form 471 requesting E-Rate support each funding year.**

FCC FORM 470 EXEMPTIONS

- Not everyone is required to file an FCC Form 470
  - Low-cost, high-speed Internet
    - ◇You do not need to file an FCC Form 470 for Internet access if your service meets ALL of the following conditions
      - It is commercially available, business class Internet access.
      - It offers minimum speeds of 100 Mbps download / 10 Mbps upload.
      - The pre-discount price — including any one-time charges — is $3,600 or less annually per entity (school or library).

WHAT IS COMPETITIVE BIDDING?

- Competitive bidding is a formal process to choose the vendors/service providers who provide your products and services
  - Describe your desired services and requirements using FCC Form 470 (and RFP if applicable).
  - Service providers read your documents and bid on your services.
  - Wait 28 days then compare the offers you receive.
  - Select the most cost-effective bid using price of the eligible products and services as the primary factor



COMPETITIVE BIDDING REQUIREMENTS

- In your FCC Form 470 and RFP, you must describe the desired products and services you need with sufficient detail for service providers to be able to submit responsive bids.
- **Note: the Category 1 pull-down options have been updated by USAC, and will change the way we request bandwidth!**
- All potential bidders must have access to your FCC Form 470, RFP, and RFP documents.
- Spell out any disqualifying factors.
- Be prepared to accept bids and answer questions.
- You must select the most cost-effective bid.

Adding New Service Request

Information on How to Seek Bids for Different Services:

If you want…	Select this 470 Drop Down Option	RFP Required?
Leased Lit Fiber Connectivity	Leased Lit Fiber (with or without Internet Access) Must explain service request in narrative text box	No
Leased Dark Fiber Connectivity	Leased Dark Fiber and Leased Lit Fiber Also must state minimum and maximum capacity needs in the narrative text box plus # of leased lit fiber circuits being requested. EPC will prompt you to specify # of leased dark fiber strands being requested.	YES
Self-Provisioned Fiber (Applicant owned)	Self-Provisioned Network (Applicant Owned and Operated Network) and Services Provided Over Third-Party Networks	YES
Non-Fiber Connectivity (coaxial cable, microwave, copper, etc.)	Transport Only – No ISP Service (Non-Fiber)	No
Category 1 Network Equipment	Network Equipment	YES
Maintenance and Operations	Maintenance and Operations	YES
Internet Access with FIBER Transport	Leased Lit Fiber (with or without Internet Access) Must explain service request in narrative text box	No
Internet Access with NON-FIBER transport (for example, cable modem, DSL)	Internet Access and Transport Bundled	No
Commodity Internet Access (no transport)	Internet Access: ISP Service Only	No

FIBER SPECIFIC COMPETITIVE BIDDING RULES

Leased Lit Fiber

- For an applicant who is only interested in seeking bids for leased lit fiber, they can post an **FCC Form 470 in EPC that only specifies leased lit fiber as the requested service.**

- To do this, they choose the **Leased Lit Fiber (with or without internet access)** drop-down option when submitting the FCC Form 470 in EPC.

FIBER SPECIFIC COMPETITIVE BIDDING RULES

High-speed Internet Access over a Non-fiber Connection

- For an applicant in an area where fiber is not available, they can post an **FCC Form 470 in EPC that only specifies high-speed internet access on other transport options (e.g., copper, microwave, or coaxial cable) as the requested service.**

- To do this, they choose the **Internet Access and Transport Bundled (Non-Fiber)** drop-down option when submitting the FCC Form 470 in EPC.

FIBER SPECIFIC COMPETITIVE BIDDING RULES

High-Speed Internet (All Transport Options)

- If an applicant is interested in high-speed internet access and wants to consider all possible transport options to choose the most cost-effective solution, they can post an **FCC Form 470 in EPC that specifies all types of high-speed internet access as the requested services**.

- To do this, they choose both the **Leased Lit Fiber (with or without internet access)** and **Internet Access and Transport Bundled (Non-Fiber)** drop-down options in EPC when submitting the FCC Form 470.

COMPETITIVE BIDDING REQUIREMENTS

- The competitive bidding process must be open and fair.
  - "Open" means that information shared with one bidder must be shared with all.
  - "Fair" means that bidders must be evaluated fairly and equally.
- **28-Day Waiting Period**
  - FCC Form 470 and any RFPs (if applicable) must be posted on the USAC website for a minimum of 28 days.
  - The end of the 28-day period is when you are allowed to review bids and select vendors — your allowable contract date (ACD).

ONLY AFTER THE 28-DAY WAITING PERIOD, YOU CAN…

1.

Evaluate the bids you received

- Use a bid evaluation matrix

2.

Choose your service provider(s)

- Notify the winner

3.

Sign a contract or legally binding agreement

- Upload the contract into EPC

4.

File the next form (FCC Form 471)

MORE ON EVALUATING BIDS

- To evaluate incoming bids, create a Bid evaluation matrix.
- Develop evaluation criteria or factors to assess the bids.
- Assign each evaluation criterion or factor a point value or percentage.
  - The Price of the eligible products and services must be the most heavily weighted factor — the "primary factor" — in your evaluation.
- The vendor who receives the most overall points or the highest percentage is the winner.

SAMPLE: BID EVALUATION MATRIX

- Evaluate your bids using a matrix, filled in with your chosen factors and point values.

Factor	Points Available	Vendor 1	Vendor 2	Vendor 3
Price of the ELIGIBLE products and services	50	20	50	40
Prior experience w/vendor	20	20	0	20
Product compatible with existing infrastructure	15	10	5	15
Flexible Invoicing: FCC Forms 472 or 474	10	0	10	10
Local or in-state vendor	5	5	0	5
TOTAL	**100**	**55**	**65**	**90**

- Vendor #3 wins

ZERO BIDS OR ONE BID

- If you receive only one bid, and it is cost-effective, you may accept it.
  - Document your decision with a memo or email for your records.
- If you did not receive any bids, you can solicit bids.
  - Reach out to vendors in the area.
  - Ask your current service provider to submit a bid or to send you an email that they are willing to continue to provide service at your current level and cost.

Fair and Open Competition

Applicants Cannot:

- Have a relationship with service providers that would unfairly influence the outcome of the competition.
- Furnish service providers with inside competitive information.
- Have ownership interest in a service provider's company competing for services.
- Fail to describe the desired products and services with sufficient specificity to enable interested parties to bid.
- Receive gifts or donations from service providers that violate FCC rules or seek to circumvent FCC rules.
  - **Note: This now includes "demo" equipment**
  - **If you're loaned a "demo" put in writing what the length of time the usage will be.**

Fair and Open Competition

Contracts

- Applicants must have a signed contract or ***other legally binding agreement*** in place prior to submitting their FCC Forms 471 to USAC.
- Signed contracts constitute the best evidence that a legally binding agreement exists.
- For Internal Connections hardware, a signed quote indicating your acceptance acts as a “contract”.
- A verbal offer and/or acceptance will not be considered evidence of the existence of a legally binding agreement.
- Purchase orders must be considered a contract or legally binding agreement in this state in which you reside.
- Voluntary contract extensions are allowable only when the option is stated in the original provisions of the contract.

MORE ABOUT FCC FORM 471

- Your application for funding identifies:
  - The services you chose
  - The service provider(s) you selected and their Service Provider Identification Number (SPIN)
  - The eligible schools/libraries that will receive the services
  - The cost of your chosen services
  - Your discount level to calculate your funding request
  - Your current connectivity speed
- USAC recommends communicating with your service provider:
  - If you need help completing technical details
  - To notify them of your desired invoicing method

COST ALLOCATION: GENERAL INFORMATION

- E-Rate funds may only be used to pay for services and products used by eligible entities for an eligible purpose (i.e., a primarily educational purpose).
- If a product or service has both eligible and ineligible functions, the cost of the ineligible functions must be allocated out of a funding request.
- A cost-allocation requires a clear delineation of costs.
- The cost-allocation must be based on a reasonable, tangible basis that reaches a realistic result.
- Cost-allocations must be supported by documentation.

APPLICATION REVIEW: PROGRAM INTEGRITY ASSURANCE (PIA)

- After submitting FCC Form 471, your application goes into review.
- Program Integrity Assurance (PIA) is the group at USAC that reviews your application and makes decisions on funding.

APPLICATION REVIEW: PROGRAM INTEGRITY ASSURANCE (PIA)

- Your PIA reviewer may contact you to:
  - Verify eligibility of one or more of your schools or libraries (usually only if they have not appeared on an application before).
  - Verify eligibility of the requested services.
  - Ask for additional documentation to verify your compliance with program rules.
- Some applications undergo additional review.
  - In “selective review,” the PIA reviewer may request more detailed responses to specific questions.

QUESTIONS FROM YOUR PIA REVIEWER

- You have 15 days to respond to PIA questions.
  - You can ask for an automatic seven-day extension if you need it.
- If you need help understanding the PIA inquiry, ask your reviewer for help.
- To answer inquiries, ask for extensions, or find your reviewer's contact info:
  - Navigate to the FCC Form 471 in EPC.
  - Choose "Related Actions."
  - Choose "Respond to Inquiries."

FUNDING DECISION

- When PIA's review is complete, you and your service provider receive a notification with decisions about your funding.
- The notification is called the Funding Commitment Decision Letter (FCDL).
- Your FCDL will show:
  - Approved funding amounts
  - Modified or denied funding amounts
  - Next steps
- FCDLs are delivered via EPC and you will also receive an email.
  - Go to the Notifications section of EPC and generate the letter.

MORE ABOUT FCC FORM 486

- Notifies USAC that your eligible services have started or been delivered.
- File FCC Form 486 after you've received your FCDL or your services have started, whichever is later.
  - Many applicants start service on July 1, the first day of the funding year.
- Confirms your status under the Children's Internet Protection Act

MORE ABOUT FCC FORM 486

- After submitting FCC Form 486, you and your service provider will receive two notifications.
  - The first notification will confirm the form was certified.
  - The second notification will be your FCC Form 486 Notification Letter telling you that your form has been reviewed and approved.

CHILDREN'S INTERNET PROTECTION ACT (CIPA) COMPLIANCE

- CIPA is a law with specific requirements for entities that receive E-Rate discounts on Internet access.
- CIPA compliance includes:
  - Internet safety policy
  - Technology protection measure/filter
  - Holding one hearing or meeting (with reasonable public notice) on the Internet safety policy
  - (For schools only) education for students on Internet safety.

Training Resources

The curriculum or method used to provide CIPA training is a local decision.

Topics to cover:

- Cyberbullying awareness and response, and
- Appropriate online behavior, including interacting with other individuals on social networking sites

A couple of free resources:

- **Netsmartz:** https://www.netsmartz.org/Home
- **Commonsense Media:** https://www.commonsense.org/education/

MORE ABOUT INVOICING (FCC FORMS 472 / 474)

- You or your service provider invoices USAC to receive funding.
- Applicants can choose their method of invoicing.

BEAR Method

- **FCC Form 472**, Billed Entity Applicant Reimbursement (BEAR) Form
- Applicant files this form after paying for the services in full to request reimbursement from USAC for the discount amount.

SPI Method

- **FCC Form 474**, Service Provider Invoice (SPI) Form
- Service provider files this form after billing the applicant for the non-discount share to request reimbursement from USAC for the discount amount.

Getting a PIN

- A PIN is needed to enter the online **BEAR Form**.
- Call the Customer Service Center at 888-203-8100 or submit a customer service case in EPC to request a PIN
  - Request must provide the following information :
    - BEN , Billed Entity Name, Full Name, Employer Name, Date of Request
    - Street Address, City, State, Zip Code, Zip+4
    - Email address
  - Note: To get a PIN, you must be a user in EPC. If you are not, contact the Account Administrator to create an account for you.
- The case will be updated to indicate when the PIN has been issued
- May take one to two weeks

INVOICING REQUIREMENTS

- If you choose to invoice via the BEAR Form, USAC will send the payment via electronic transfer directly to your organization's bank account.
- First, you must provide your banking information on FCC Form 498 to obtain an Applicant 498 ID.
  - This form is available in the school or library's EPC profile under "Related Actions" if your account administrator assigned you rights to access this form.
  - Note: If you have an approved Form 498, you **do not** have to file another one, it's a one-time thing. If there are changes, you will need to edit the current form, do not file a second one.

INVOICING REQUIREMENTS

- Before invoicing USAC for your funding, you must have:
  - Received an FCDL with a positive commitment.
  - Received an FCC Form 486 Notification Letter.
  - Received and paid for your products or services.
- Your service provider must have completed FCC Form 473, the Service Provider Annual Certification (SPAC) Form, for that funding year.

PRE-COMMITMENT DEADLINES

- **FCC Form 470**
  - Post to the USAC website no later than 28 days before the last day of the FCC Form 471 filing window.
- **Admin Window**
  - October 1st – closes several days prior to the opening of the Form 471 window
- **FCC Form 471**
  - File only during the application filing window (exact dates vary each year).
  - File by 11:59 PM EDT on the last day of the filing window.
- **FCC Form 486**
  - Deadline is 120 days after service start date or 120 days after the date of the FCDL — whichever is later.

POST-COMMITMENT DEADLINES

- **FCC Forms 472 and 474** (invoicing)
  - Deadline is 120 days after the last day to receive service or 120 days after the date of the FCC Form 486 Notification Letter — whichever is later.
  - For most applicants these dates are October 28 (for recurring services) and January 28 (for non-recurring services) following the close of the funding year.
- **Invoice Deadline Extensions**
  - You can request and receive one 120-day extension of the invoice deadline.
  - The request must be submitted on or before the original invoice deadline.
  - You do not need to provide a reason for your request.

ABOUT FCC FORM 500 (FUNDING ADJUSTMENTS)

- Requests specific changes to your funding commitments after USAC issues your FCDL, such as:
  - The contract expiration date listed on FCC Form 471.
  - The service start date listed on FCC Form 486.
  - The cancellation or reduction of a Funding Request Number (FRN).
  - The request to extend the deadline for delivery of non-recurring services.
- Form 500 for Category 2 (C2) funding reductions
  - If you do not use all of your C2 funding commitment, submit FCC Form 500 to release unused funding back to your five-year C2 budget.
  - USAC will assume you are using your commitment unless you file this form.

DOCUMENT RETENTION

- You must keep all documentation for 10 years from the last date of service.
  - For multi-year contracts this means 10 years from the contract expiration date
- Keep all records such as:
  - Competitive bidding documentation
  - Contracts
  - Forms
  - Proof of payment and delivery
  - All other matters relating to the program
  - For an exhaustive list of E-Rate documentation, refer to the E-Rate Program Binder.

Quick Way to Get the Information Needed

Go to: www.E-Ratecentral.com

FY: 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | All

E-Rate Organizer Utilization Summary Chart

Applicant: CHILLICOTHE CITY SCHOOLS

Billed Entity: 130001

FY	Req. FRNs	Funded FRNs	486 on File	Requested Amount	Committed Category 1	Committed Category 2
2018	4	2	0	$170,944.12	$13,333.54	$0.00
2017	6	5	5	$96,374.62	$93,790.46	$0.00
2016	6	5	5	$141,709.55	$101,468.21	$28,241.34
2015	5	5	5	$142,413.15	$142,413.15	$0.00
2014	5	5	5	$178,115.77	$178,115.77	$0.00
2013	5	5	5	$145,252.80	$145,252.80	$0.00
2012	6	5	5	$177,471.03	$169,719.03	$0.00

1. Enter you Billed Entity Number.
2. Click on Funding Year
3. See your 471, FRN, and SPIN information.

471	FRN	SPIN	Service Provider
171022882	1799047582	143034775	Agile Network Builders
171022882	1799047583	143001688	The Ohio Bell Telephone Company
171022882	1799047588	143001688	The Ohio Bell Telephone Company
171022882	1799047620	143001688	The Ohio Bell Telephone Company

FY2019
Eligible Services List

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Category One

Eligible Data Transmission Services and Internet Access

- Fiber (Leased Lit and Leased Dark)
- OC-1, OC-3, OC-12, OC-n
- Wireless Service (e.g. microwave)
- Satellite Services
- DS-1, DS-2, DS-3
- Ethernet
- T-1, T-3, Fractional T-1
- Frame Relay
- SMDS
- Cable Modem
- DSL
- ATM
- Broadband over Power Lines
- Self-provisioned Broadband Networks

Eligibility Limitations for Internet Access

- A firewall service that is a standard component of an Internet access service does not require cost allocation.
- A standalone firewall service either provided by a third party or priced out separately is only eligible as a Category Two internal connections component.
- Off-campus use, even if used for an educational purpose, is ineligible for support and must be cost allocated out of any funding request.

Eligibility Limitations for Data Plans for Portable Devices

- Since FY2015, data plans and air cards for mobile devices are eligible only where the school or library demonstrates that the individual data plans are the most cost-effective option for providing internal broadband access for mobile devices.
- Applicants need to compare the cost of data plans or air cards for mobile devices to the total cost of all components necessary to deliver connectivity to the end-user device.
- Request must be for services that will be in use, must not be for duplicative services, and must cost allocate off-campus use.

Category Two Services

- Internal Connections
- Basic Maintenance of Internal Connections
- Managed Internal Broadband Services

Category Two services are subject to the Category Two five-year budget requirements.

Eligible Internal Connections

- Access points
- Cabling
- Caching
- Firewalls
- Switches
- Routers
- Racks
- UPS
- Wireless LAN Controllers
- Improvements, upgrades and software necessary to support eligible broadband internal connections components
- Functionalities listed here that can be virtualized in the cloud, and equipment that combines eligible functionalities are also eligible.

Category Two

Know What Portion Is Eligible

If a device includes some ineligible functionality, that portion will not be funded. Some companies publish the eligible %.

- Cisco/Meraki Products: http://ciscoerate.com/
- FortiNet: http://erateproviderservices.com/fortinet-home/product-eligibility/

Category Two

Managed Internal Broadband Services (e.g., Managed Wi-Fi)

- Services provided by a third party
  - Operation
  - Management
  - And/or monitoring of eligible broadband internal connection components
- The third party may manage the school's or library's equipment or provide the equipment as part of a lease.

Managed Internal Broadband Services (e.g., Managed Wi-Fi)

- Eligibility Limitations
  - Supports only the equipment functions listed as eligible as broadband internal connections components.
  - Upfront charges as part of the contract are eligible.
    - Any ineligible internal connections components (e.g. tablets) must be cost-allocated out.

Basic Maintenance of Internal Connections

- Support for basic maintenance of eligible internal connections such as:
  - Repair and upkeep of hardware
  - Wire and cable maintenance
  - Basic tech support
  - Configuration changes
- Support for BMIC is limited to actual work performed under the contract.

Basic Maintenance of Internal Connections

- Basic maintenance does not include:
  - Services that maintain ineligible equipment
  - Upfront estimates that cover the full cost of every piece of eligible equipment
  - Services that enhance the utility of equipment
  - Network management services, including 24-hr network monitoring
  - On-site technical support
  - Unbundled warranties
- Note: Operations and management of eligible equipment is not supported as BMIC, but is eligible as Managed Internal Broadband Services.

Miscellaneous

- Eligible Charges
  - Taxes, surcharges and other similar reasonable charges
  - Lease fees to rent or lease eligible components
  - Shipping charges
  - Training
  - Installation and configuration
    - Installation may be provided by a third party

Installation Periods

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Early Installation

What is early installation?

- Some **Category One** non-recurring components can be installed as early as January 1, prior to the July 1 start of the funding year, if certain conditions are met.

- **Category Two** non-recurring services can be installed beginning the April 1 before the funding year.

Early Installation

What is early installation?

Early installation for non-recurring **Category One** services can occur provided the following conditions are met:

- The service provider must be selected pursuant to an FCC Form 470 posting;
- Construction begins after selection of the service provider;
- A Category One recurring service must depend on the installation of the infrastructure; and

Early Installation

What is early installation?

- The **Category One** recurring service's actual start date is on or after July 1 of the funding year.
- NOTE: The invoices (BEAR or SPI) cannot be dated before July 1 of the funding year.

Additional Reminder: Funding is **not** guaranteed until USAC makes a commitment.

Category Two Non-recurring Services (Internal Connections)

- Installation of **Category Two** non-recurring services **may begin on April 1 prior to the July 1 start of the funding year.**

- The service delivery deadline for the implementation for **Category Two** non-recurring services is September 30 following the end of the funding year.

Additional Reminder: Funding is **not** guaranteed until USAC makes a commitment.

Maximizing Your Category 2 Funding

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DETERMINING YOUR NEEDS

Do your schools have robust Wi-Fi in every classroom?

Best Practice/Recommendations

- Access Points -
  - 1 per classroom; more in common areas
  - 802.11ac Wave 1 recommended
- Controllers -
  - Cloud-based controllers offer flexibility
- Cabling –
  - Copper needs to be Cat5e or greater
  - New installs should be Cat6a
  - 10Gbps fiber between network closets

DETERMINING YOUR NEEDS Cont.

- Switches -
  - 1Gbps Copper ports + 10Gbps fiber expansion
  - Support PoE+
- Routers –
  - Router ports should be able to scale with WAN bandwidth
- Firewalls –
  - Use funds to purchase if not receiving as a Category 1 service
  - Make sure hardware can scale with Internet bandwidth
- Managed Wi-Fi –
  - Do you have the staff/resources to adequately manage your Wi-Fi network?
  - Will you contract for management of district owned equipment, or include the hardware as part of the service?
  - If included in the service cost, what is the refresh rate?

WHERE DO I START FOR WIRELESS?

- Access Points & Controllers
  - What kind of wireless system do I have now? (hardware, cloud-based, controller-less)
  - Is it meeting my needs? Do I want to change or keep? Or get managed services?
  - How many access points do I need? Will my school's construction (e.g. concrete, lathe and plaster, etc.) affect how many APs I need?
  - Will my existing controllers support an update to the next generation of APs?
  - Because NIFs do not qualify for C2 funds, can existing hardware be utilized in those facilities?

WHERE DO I START FOR WIRED?

- Cabling
  - What's my cabling standard?
  - How many network drops do I need in each classroom, office, common area?
  - Do I have fiber between my IDF & MDF?
- Switches
  - Are any of the switches only 10/100Mbps capable?
- Routers
  - How fast is my router port to the WAN and to the internal IDFs?
  - Is it going to be a bottle neck?

START PLANNING NOW

- **FALL** –
  - Assess your needs
  - Plan and design your upgrade
  - Release E-Rate Form 470/RFP
- **Winter** –
  - Evaluate bids after 28-day waiting period
- **Spring** –
  - Select provider and apply for E-Rate funding by filing Form 471
- **Spring/Summer** –
  - Upgrade network

OTHER C2 BUDGET CONSIDERATIONS

- Are you in a construction project?
- If so, do you plan to use your C2 funding?
- Things to consider:
  - Has the technology package gone out to bid yet?
  - If not, communicate with your team that you plan to request E-Rate funding for the eligible components.
  - You must file a Form 470, and include the RFP indicating the type components and estimated quantity.
  - E-Rate requires that you wait a minimum of 28-days before choosing a vendor, and the chosen vendor must have or request a Service Provider Identification Number (SPIN)

Fiber Options

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Fiber Options Supported By E-Rate

- **Leased Lit Fiber:** A fiber-based broadband service where the service provider owns and manages the network, and the E-Rate applicant pays a recurring fee to have data transported over the network.
- **Leased Dark Fiber (including IRUs):** The E-Rate applicant leases a portion of a provider-owned and maintained fiber network and separately pays to have that fiber lit in order to transmit information over that fiber.
- **Self-Provisioned Network:** Complete applicant ownership of a high-speed broadband network. The applicant hires a vendor to construct the network or a portion of the network, and thereafter owns and maintains that network or portion.

  Note: *Although included as a fiber option, applicants may seek support for self-provisioned networks using technologies other than fiber.*

What is special construction?

Special construction refers to the upfront, non-recurring costs associated with the installation of new fiber to or between eligible entities.

Applicants may seek funding for special construction charges in connection with leased lit fiber, leased dark fiber, and self-provisioning.

Special construction charges eligible for Category One support consist of three components:

1. construction of network facilities;
2. design and engineering; and
3. project management.

Note: The term "special construction" does not include Network Equipment necessary to light fiber, nor the services necessary to maintain the fiber. Charges for Network Equipment and fiber maintenance are eligible for Category One support as separate services, but not as special construction.

Timing

- **General Rule:** E-Rate support is only available for leased dark fiber (with and without special construction) that is lit, and self-provisioned networks that are constructed and used, in the same funding year.
- **Limited Exceptions For Special Construction:**
  - Special construction charges incurred up to six months prior to the beginning of the funding year are eligible for support if:
    - Construction begins after selection of a service provider pursuant to a valid competitive bidding process;
    - A Category One recurring service depends on the installation of the infrastructure; and
    - Actual service start date is after the start of the funding year.

    Note*: *Applicants that start construction early, before a funding request is approved, assume the risk that the request will be denied.
  - Applicants may request a one year extension to light leased dark fiber, or to construct and use a self-provisioned network, if the applicant demonstrates that construction was unavoidably delayed due to weather or other reasons.

Tools To Know About

Education SUPERHIGHWAY

https://RFP Guides & Templates/

1.

Get Started
Understand why now is the best time to consider a network upgrade and how to plan for your district's future bandwidth and Wi-Fi needs.

Why Upgrade & Why Now

K-12 Bandwidth Goals

K-12 Internal Network Goals

2.

Research Your Options
Identify which broadband services and network equipment would best support your district's future digital learning plans.

Broadband Fiber Options

Internal Network Options

3.

Secure Funding
Explore how your district can take advantage of available funding from E-Rate and State Match to support your upgrades.

E-Rate

State Matching Fund

Consortia Models

Other Funding Sources

4.

Purchase & Implement
Use our custom templates and tips to procure an affordable, robust network for your district using E-Rate funding.

RFP Guides & Templates

Form 470 Guides & Templates

Vendor Negotiation

Next Steps

EPC Portal Fundamentals

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What is EPC?

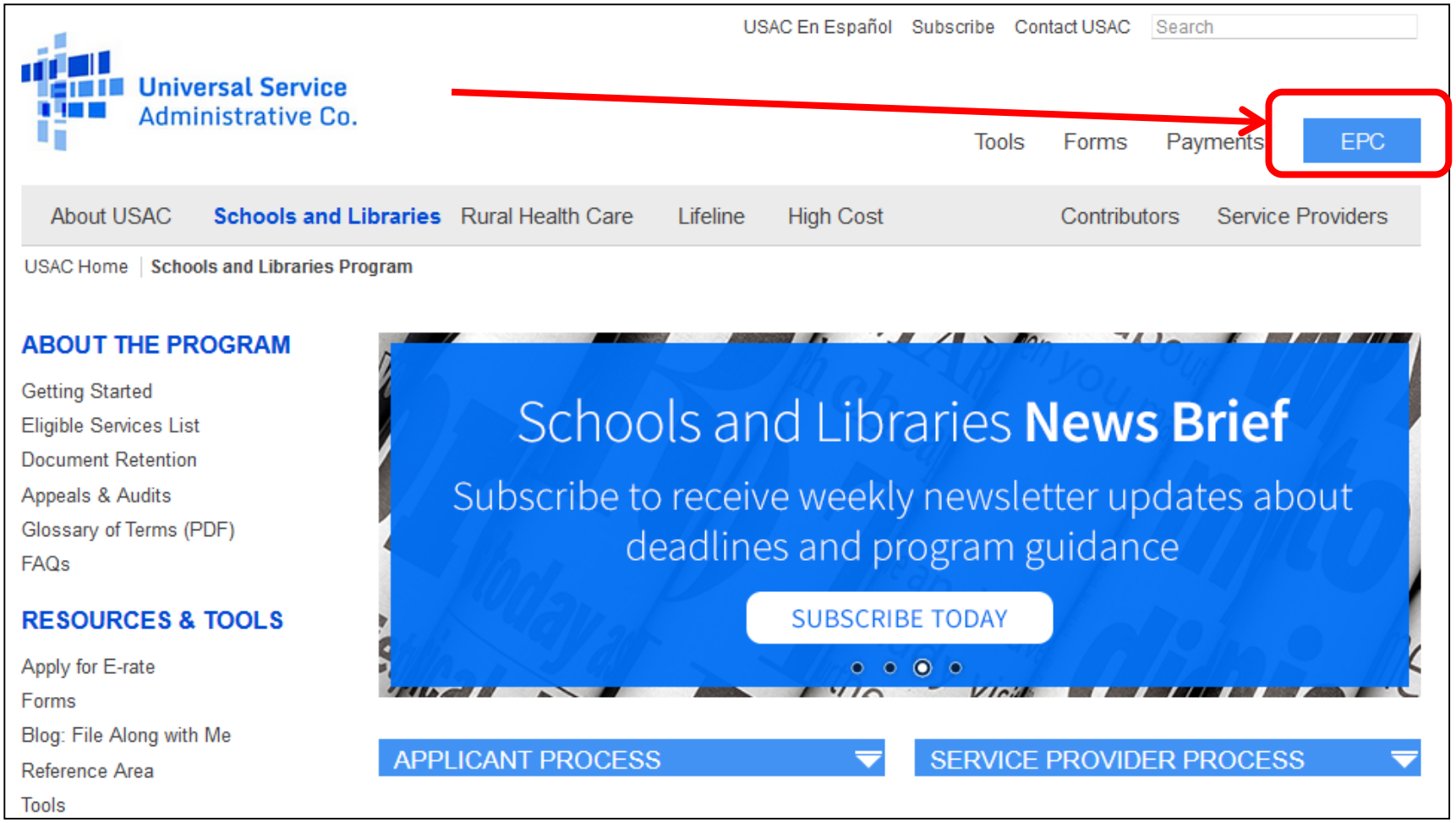
- EPC is the E-Rate Productivity Center – the main point of contact for applicants with the E-Rate Program
  - Complete and certify program forms including FCC Forms 498, 470, 471, and 486 **(Note: the BEAR Form is not in EPC, but on USAC's legacy system)**
  - Obtain the status of applications and requests
  - Submit appeals and post-commitment change requests (e.g., SPIN changes and service substitutions)
  - Receive timely reminders and notifications
  - Respond to PIA questions
  - Ask USAC questions

What do I need to begin using EPC?

- Account administrator
  - The account administrator can:
    - Create other users on the organization account.
    - Assign user rights (permissions) to those users.
      - Full rights – view, complete, and certify program forms, update profile information.
      - Partial rights – view and complete program forms, update profile information.
      - View-only rights – view program forms and profile information.
    - Update his or her own rights.

- **Note**: Once additional users are created, the Account Admin can transfer the admin rights to another user.

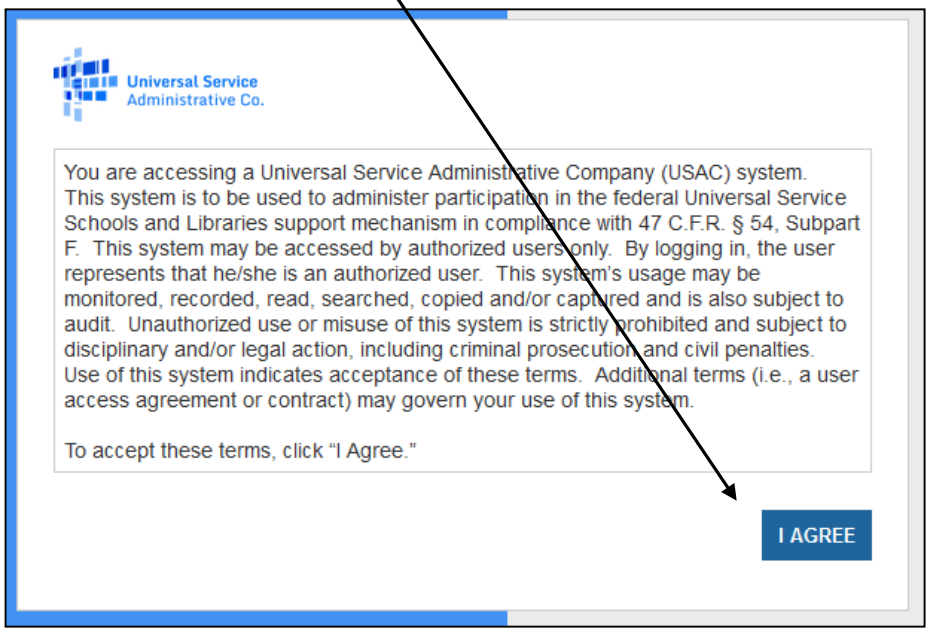
Logging In

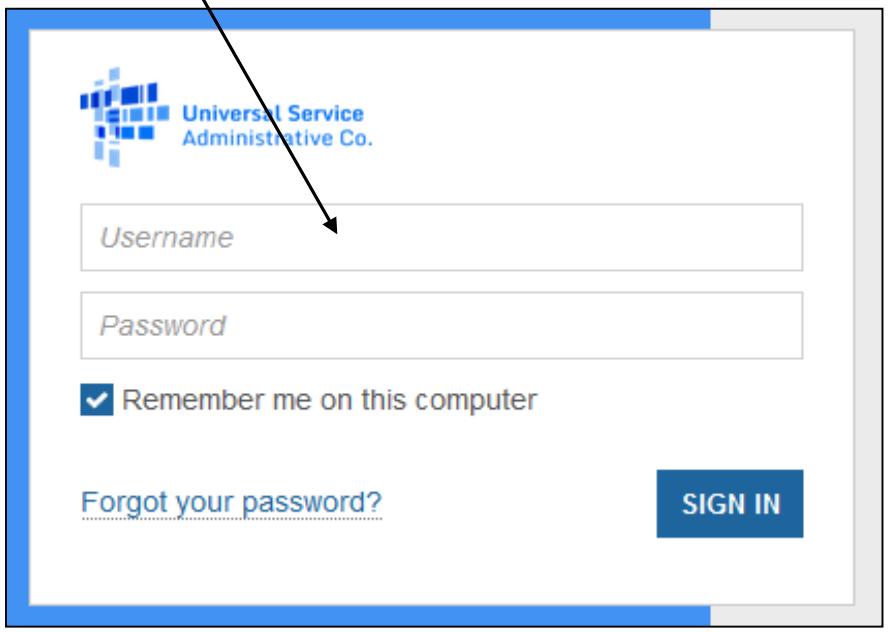


To access the EPC Portal, go to www.usac.org/sl and click on “EPC” logo.

Logging In

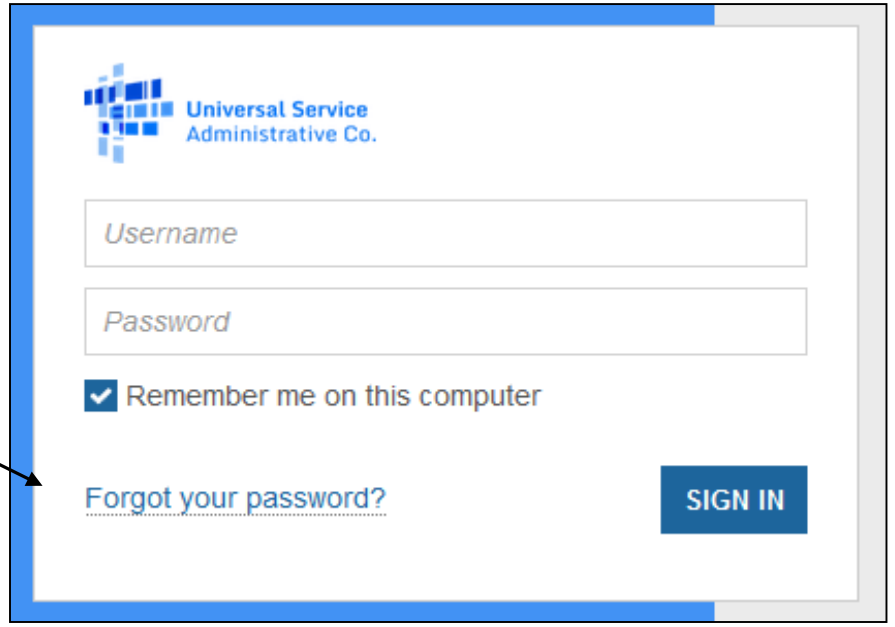
Click on “I Agree” to accept the terms. Enter your email address as username.





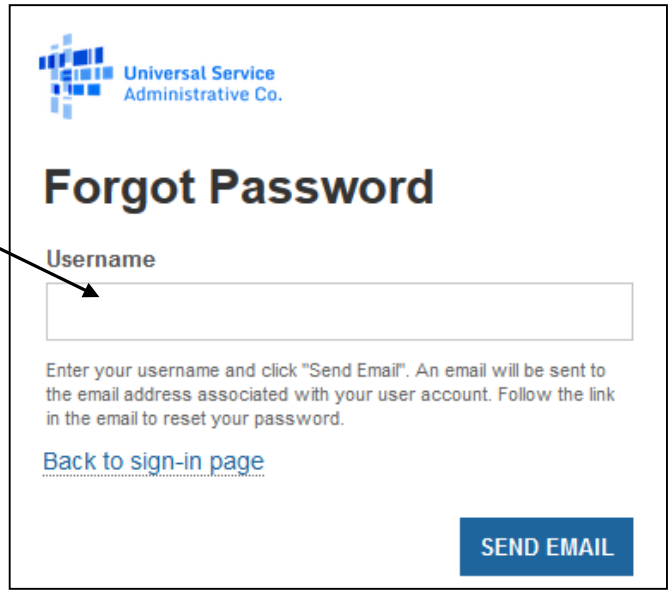
Logging In

If first time using EPC after creation of user account , click on “Forgot Password”.

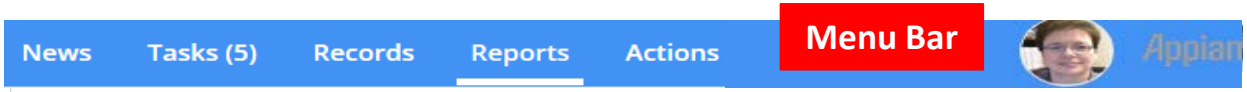


Enter Username (email address) and click on “Send Email”.

You will receive an email with a link to reset password, but it’s only valid of 15 minutes.



My Landing Page



My Landing Page

Funding Request Report | FCC Form 470 | FCC Form 471 | FCC Form 486 | Appeal | Manage Users | Manage Organizations | USAC Website | Contact Us | Help

Quick Links

Universal Service Administrative Co.

Clicking on USAC logo brings you back to the Landing Page

Welcome, School District 18!

Notifications

Notification Type: Please select a value

Funding Year: -- Select a Funding Year --

Status: All / Generated / Not Generated

Notifications

	Notification	Description	Issued Date	Generated By	Generated On
No items available					

My Entities

Entity	Entity Number	City	State	Zip Code
School District 18	170	Springfield	OH	45501
School District 18 NIF	171	Springfield	OH	45501
School District 18 School A	172	Springfield	OH	45502
School District 18 School B	173	Springfield	OH	45501

My Entities

My Tasks

Name	Received	Status	Deadline
Create FCC Form 471 - 161000049 - FY2016 Category 2	10/2/2016 12:26 AM EDT	Assigned	
Create FCC Form 486 - FY16 Form 486	10/15/2016 10:45 PM EDT	Accepted	
Create FCC Form 471	10/15/2016 12:25 AM EDT	Assigned	

My Tasks

Customer Service Cases

Case ID	Topic	Nickname	Status	Date Created
No items available				

Customer Service Cases

FCC Forms

Form Type: FCC Form 470

Funding Year: -- Select a Funding Year --

Status: All / Incomplete / Certified

FCC Forms

Nickname	Application Number	Funding Year	Status
No items available			

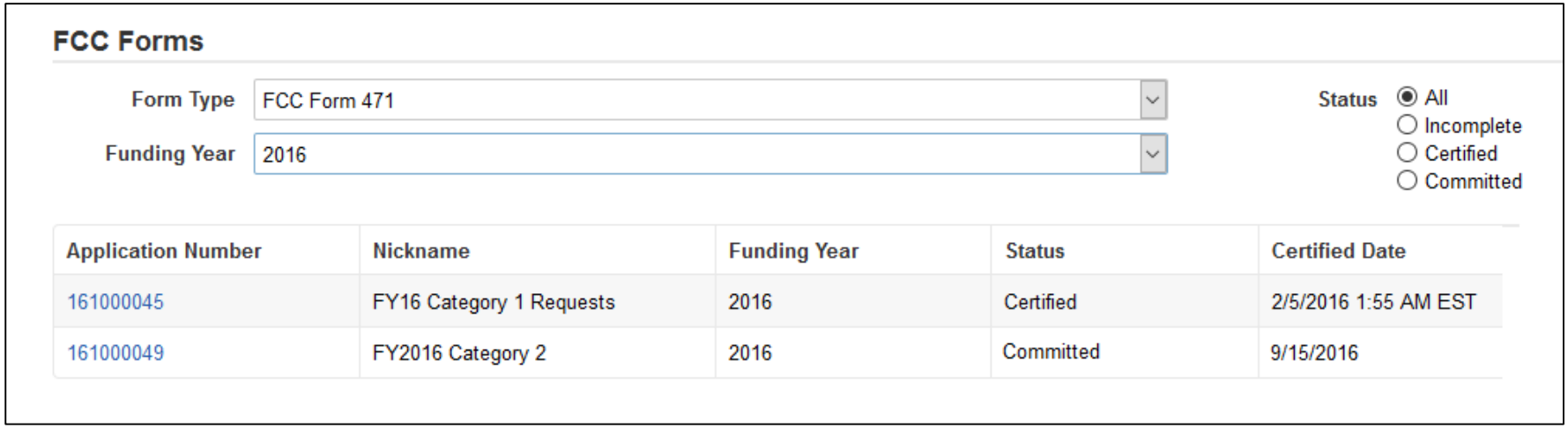
Navigation

Notes on filing program forms

- FCC Forms 470, 471, 486 can be filed from:
  - The quick links below the menu bar – OR –
  - The parent organization's main page (click "Related Actions" and then the appropriate form, or click "FCC Forms" and then the appropriate button at the top of the page)
- FCC Form 498 can be filed from the parent organization's main page by clicking "Related Actions."
  - Only the school or library official or general financial contact will be able to see the FCC Form 498 link.

Navigation

FCC Forms

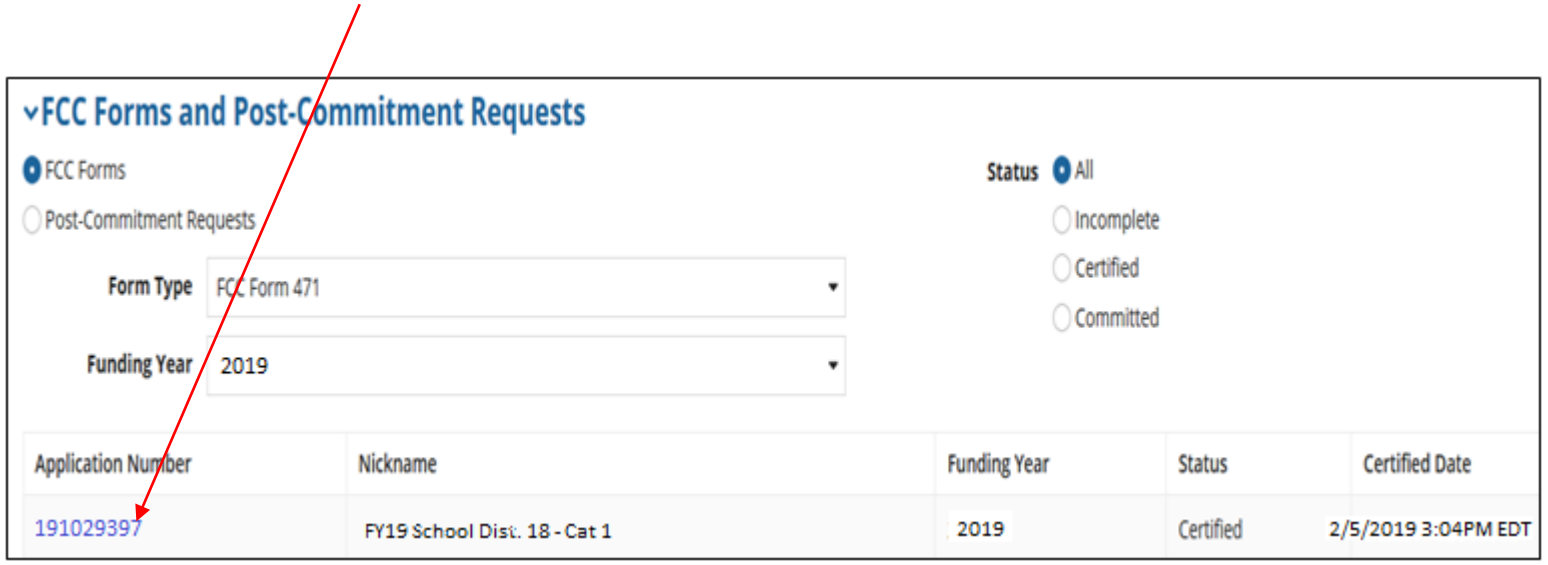


- From this section, you can search for and view program forms started and/or certified by your organization.

Additional Actions

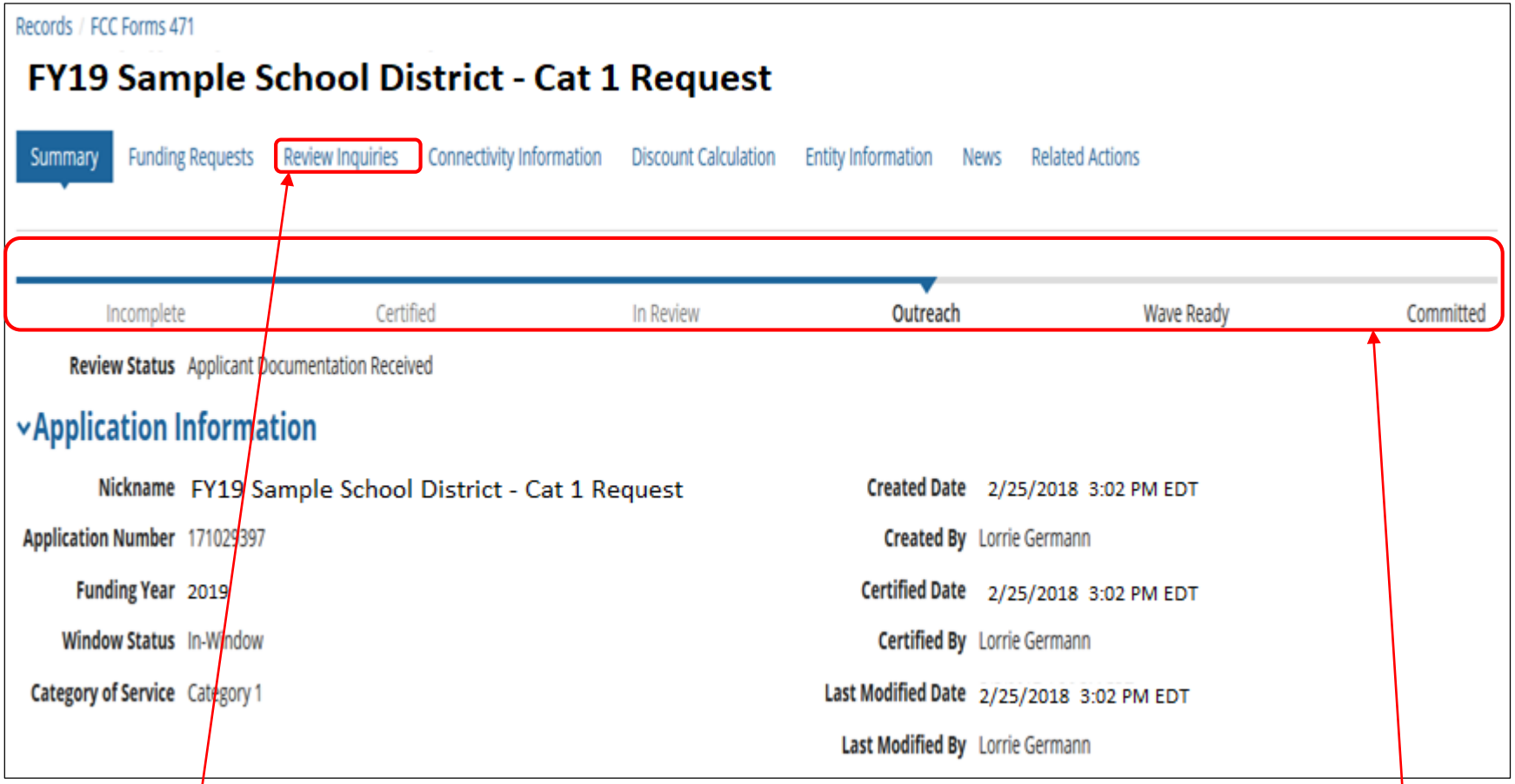
How to respond to PIA questions

- USAC notifies the applicant of the questions through email to the contact person.
- To access, you can click on the Form 471 application number on the Landing Page:



Additional Actions

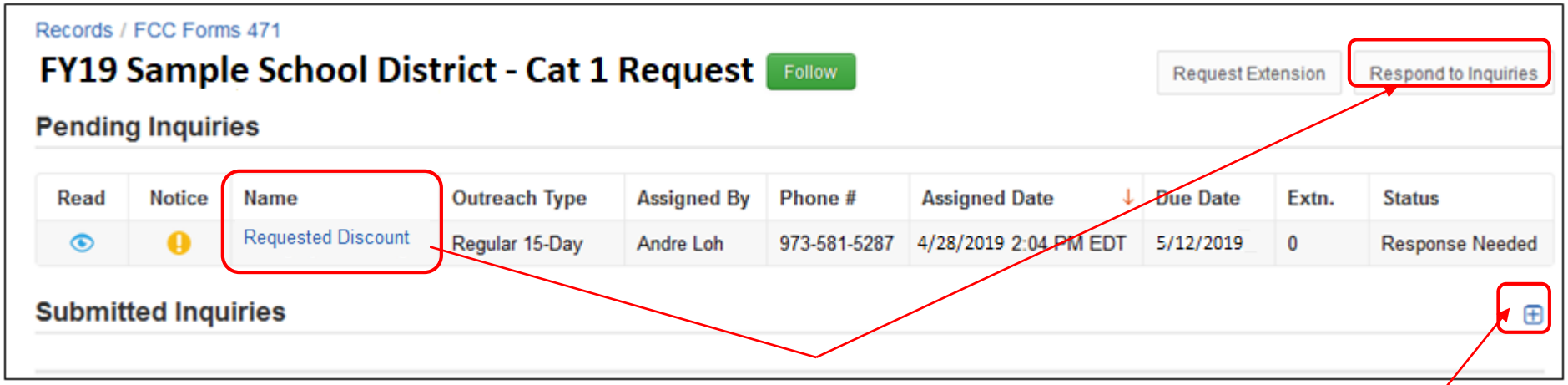
How to respond to PIA questions



- Click on “Review Inquires” and then “Respond to Inquires” to access questions. The breadcrumb at the top of the page will also tell you the status of your application.

Additional Actions

How to respond to PIA questions



- After clicking on “Respond to Inquires”, click on the “Name” of the inquiry to access questions. If there are multiple inquires listed, be sure to respond to all items.
- If more time is needed, you may request an extension, and extend the due date an additional seven days.
- To see previously submitted inquiries, click on “+”.

Additional Actions

How to respond to PIA questions

Requested Discount

Issue

USAC's Program Integrity Assurance (PIA) team is currently reviewing your FCC Form 471 application, and we have identified an issue that we need you to help us resolve.

What is the issue?
On your form, you requested funding for 123000 - MY EXAMPLE SCHCOL DISTRICT however, we are unable to determine if all entities within this school district have been included. This is an issue because a school district's discount is calculated by using the schools that are a part of the school district and by determining urban or rural status..

Before we can progress with processing your application, PIA needs to ensure that all related entities and no unrelated entities are on your application. (For reference, please read USAC's information on Parent Entities and Child Entities at http://usac.org/sl/applicants/beforeyoubegin/entity-number.aspx).

Please read all of the questions, descriptions, and requests below. Provide responses that most accurately reflect the status of the entities listed above. Please give enough detail, insight, and clarity to help the reviewers fully understand your specific situation. Also, if your answer pertains to a specific entity, be sure to include the relevant BEN with that answer.

Check the boxes for statements that apply, and where applicable, type the information requested into the text boxes. If your information is too detailed for the text box, or if you need to provide additional documentation, click "Browse" to upload relevant files or documentation.

Question(s)

This page will timeout after an extended period of inactivity. Please periodically save your work using the 'Save & Close' button below. You may then use your browser's 'Back' button to return to your work.

Your response to PIA's questions:

#	Question	Response
1	Are any of the entities on your application Private or Charter schools that generally operate independently of 123000 - MY EXAMPLE SCHCOL DISTRICT and are individually responsible for their finances and administration?	--Yes / No--
a	If Yes, please provide the name and number of the entities that are independent schools in writing from a school official. On the e-mail or letter, please provide the name and title of the school official providing the response.	Browse... No file selected.
2	Please provide third-party verification of all schools that fall under the authority of 123000 - MY EXAMPLE SCHCOL DISTRICT such as an official state report or web site, or a letter from your State Department of Education (on state letterhead and signed by a chief official at the State Department of Education) verifying all the schools that fall under the authority of 123000 - MY EXAMPLE SCHCOL DISTRICT	Browse... No file selected.
3	If you would like to provide any additional information about these issues that have not been addressed above: Use the text box to type information, or upload additional documentation using the "Browse" button.	

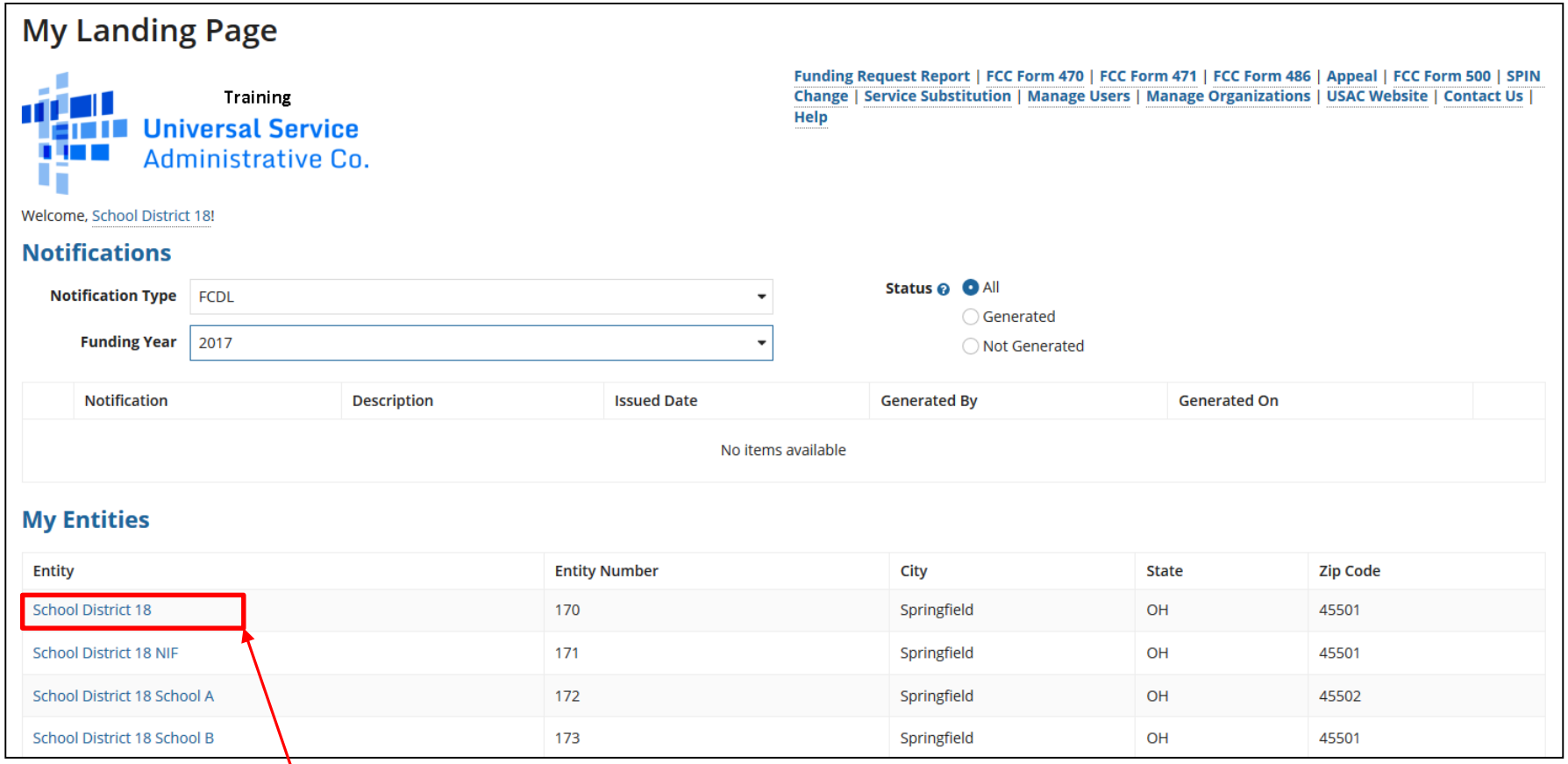
+Add Document

Delete Uploaded Files

Save & Close Submit

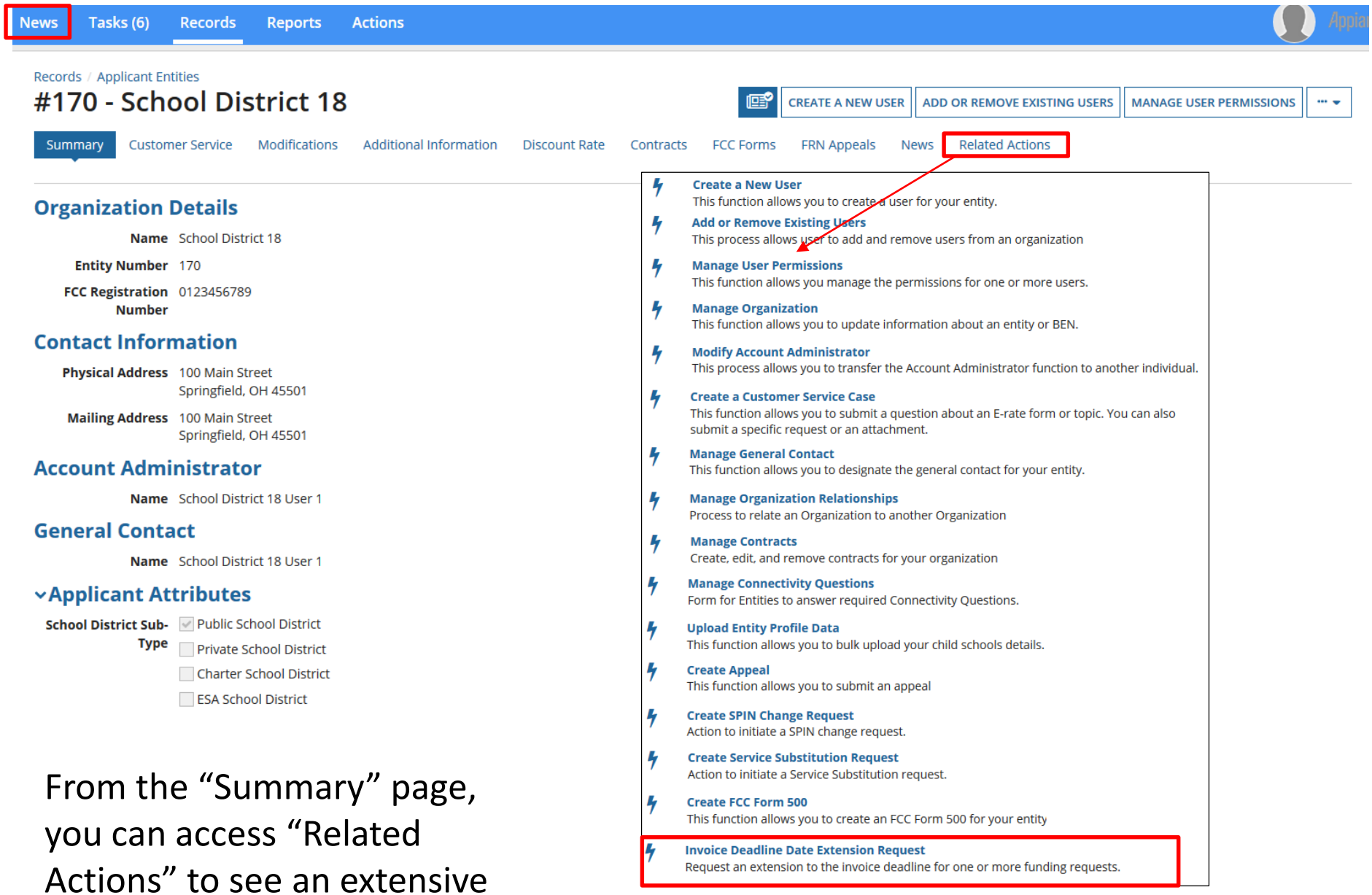
- You will receive an explanation of the issue, and questions that need addressed. You can upload documents to support your response, and then "Submit".

Landing Page View



Clicking on the district's (Billed Entity) name will take you to the district's "Organization Detail" summary page.

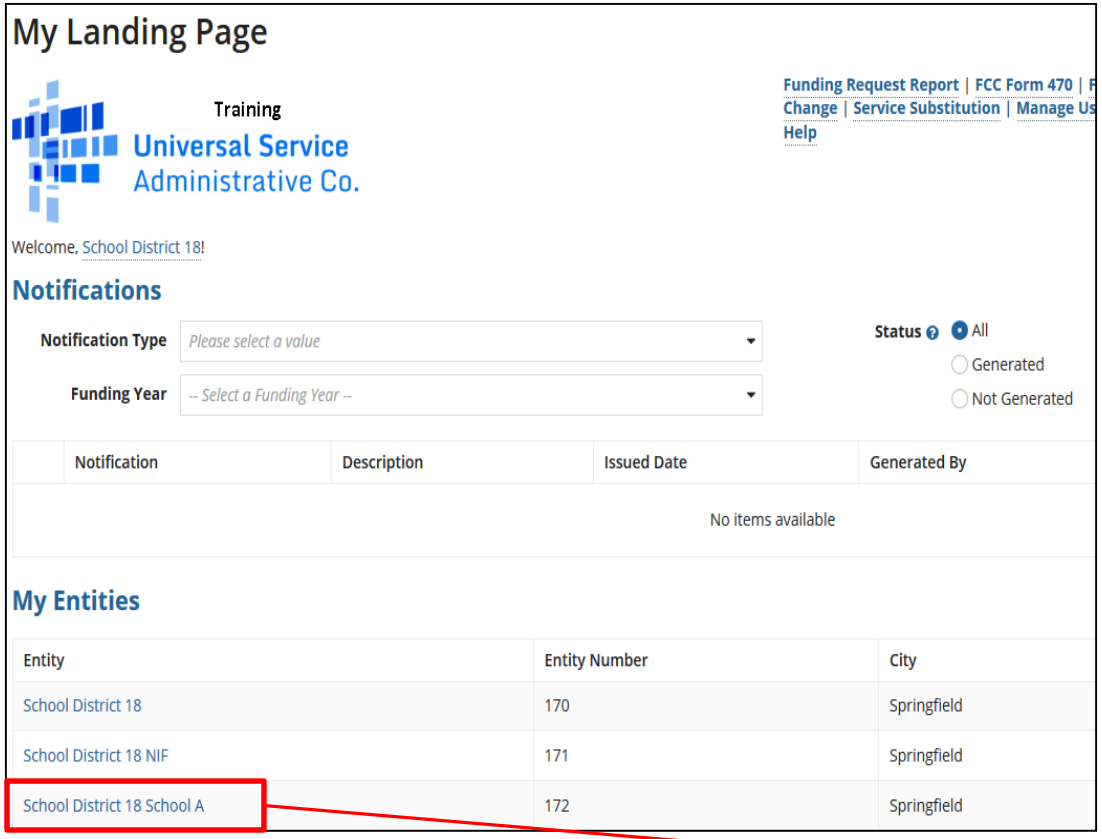
"Related Actions" Menu



From the "Summary" page, you can access "Related Actions" to see an extensive list of menu options.

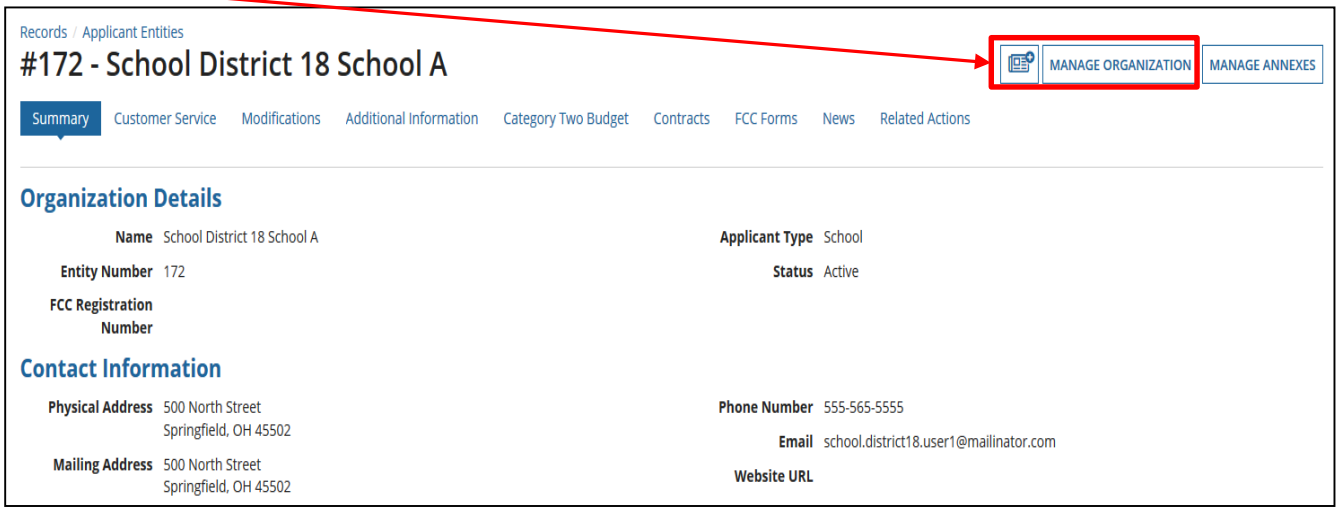
Note: to get back to Landing Page, click on "News", and then USAC logo.

School Detail Page

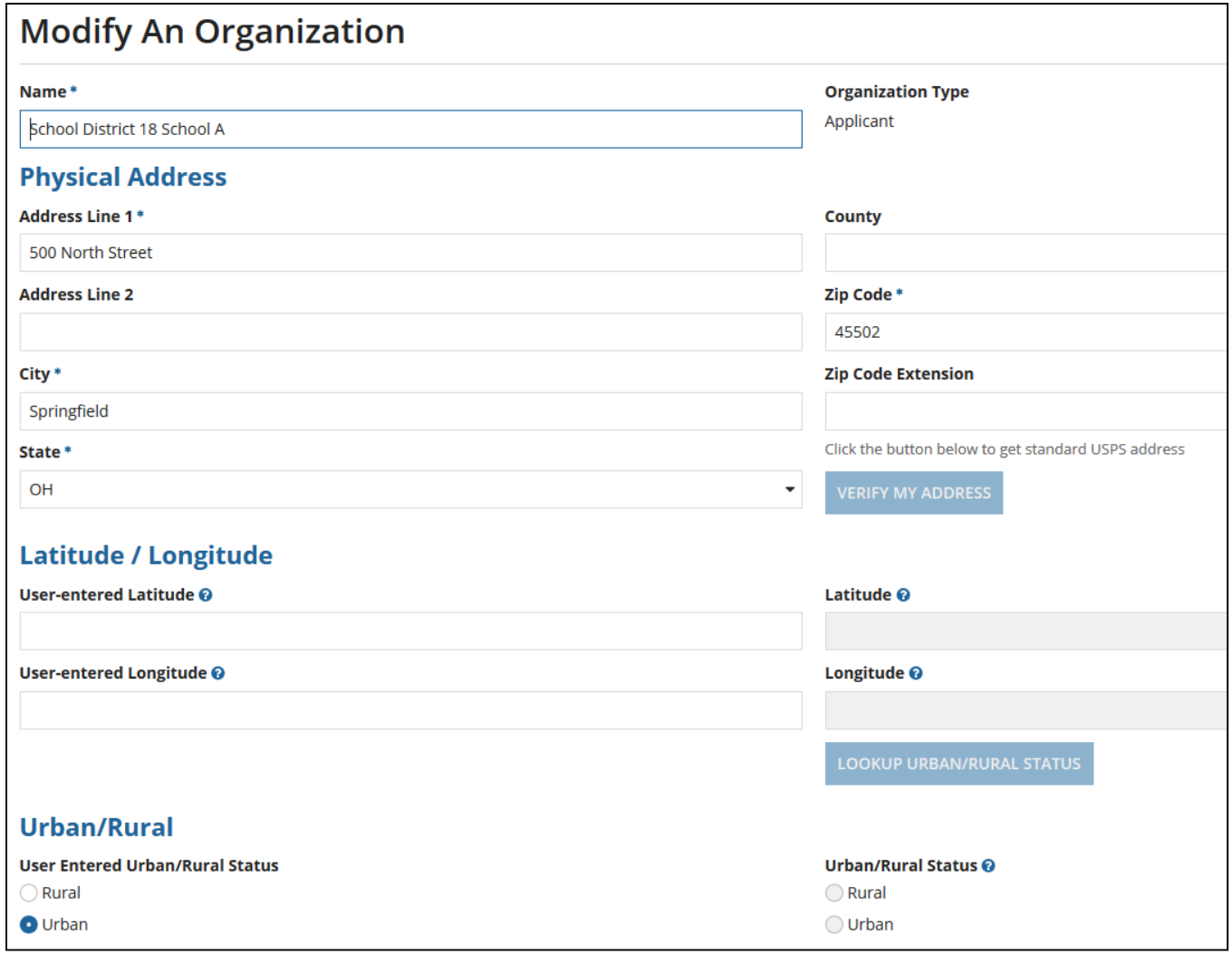


Click on the name of each school, and then “Manage Organization”, to edit information pertaining to this building, such as Student or NSLP Counts.

Note: You also have the option to provide information if there is an annex associated with this school.



Modify An Organization - School Detail View



View after clicking on “Manage Organization”

From here, you can correct building addresses.

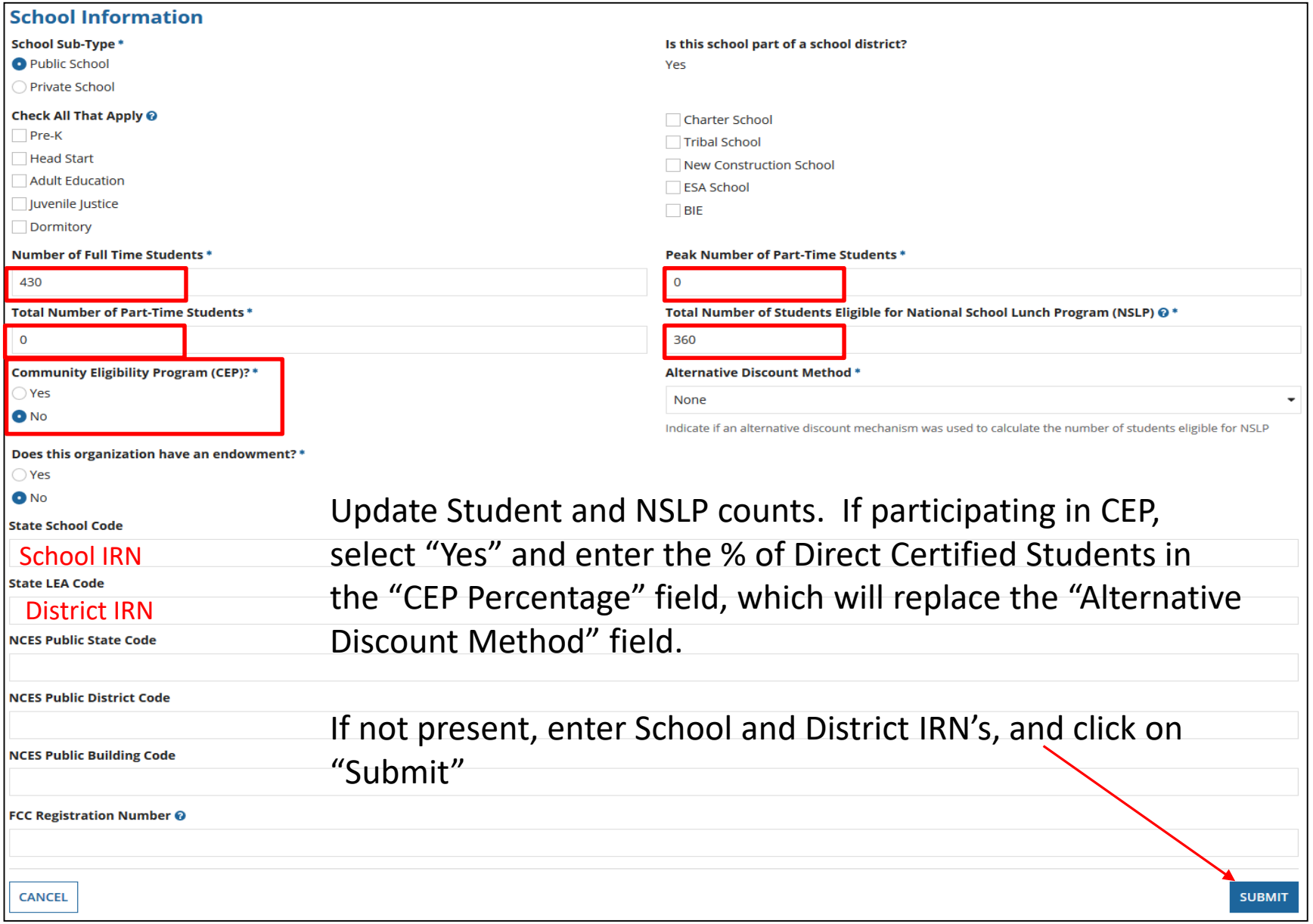
Discount Calculations

Data from October 2018 MR-81 :

Sponsor Name	SiteIRN	Site Name	NSLP Provision	Enrollment	Free Lunch App.	Reduced Price Lunch App.	Free/ Reduce Total	Percent Free Lunch	Percent Reduced Price Lunch	% Free/ Reduced Price Lunch	CEP Eligible Students	Percent Direct Certified
Troy City SD	00016725	Hook Elementary School	Traditional	235	75	23	98	31.91%	9.79%	41.70%		
Troy City SD	00011924	Forest Elementary School	Traditional	254	125	25	150	49.21%	9.84%	59.06%		
Troy City SD	00019372	Kyle Elementary School	Community Eligibility Provision	265	-	-	0	-	-	71.25%	118	44.53%
Troy City SD	00007294	Cookson Elementary School	Traditional	289	133	20	153	46.02%	6.92%	52.94%		
Troy City SD	00015990	Heywood Elementary School	Community Eligibility Provision	322	-	-	0	-	-	69.57%	140	43.48%
Troy City SD	00066498	Van Cleve Elementary School	Traditional	361	113	24	137	31.30%	6.65%	37.95%		
Troy City SD	00007161	Concord Elementary School	Traditional	541	65	8	73	12.01%	1.48%	13.49%		
Troy City SD	00065292	Troy Junior High School	Traditional	703	209	48	257	29.73%	6.83%	36.56%		
Troy City SD	00037598	Troy High School	Traditional	1,427	355	60	415	24.88%	4.20%	29.08%		

Free/Reduced Total will be 140 x 1.6 = 224

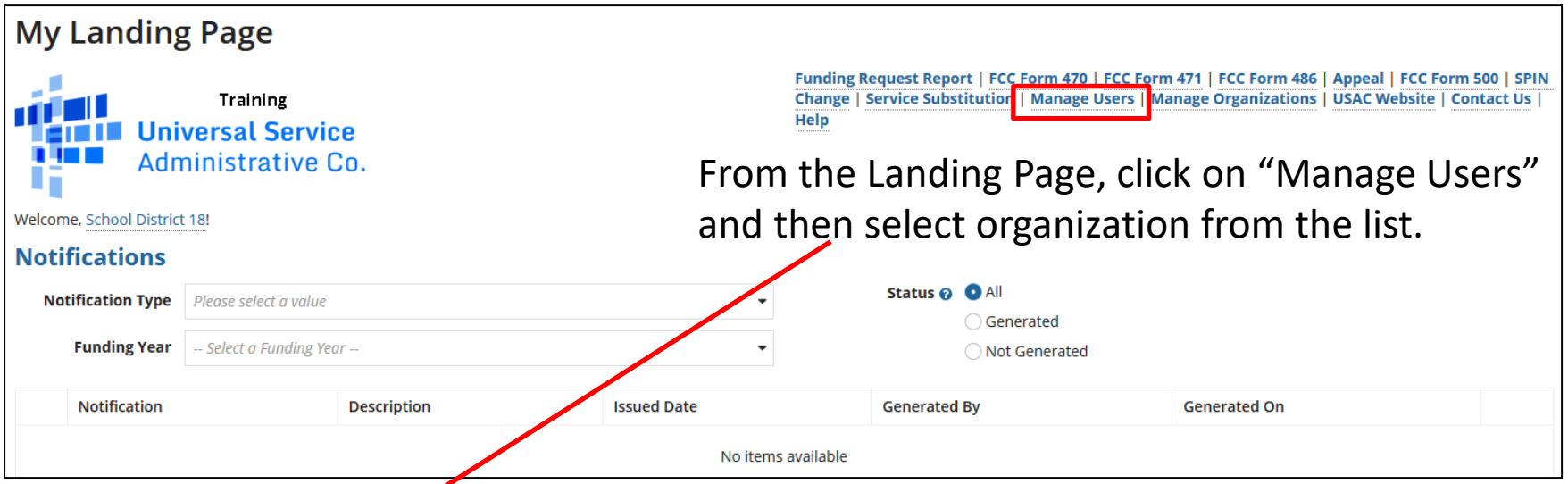
Modify An Organization - School Detail View



Update Student and NSLP counts. If participating in CEP, select "Yes" and enter the % of Direct Certified Students in the "CEP Percentage" field, which will replace the "Alternative Discount Method" field.

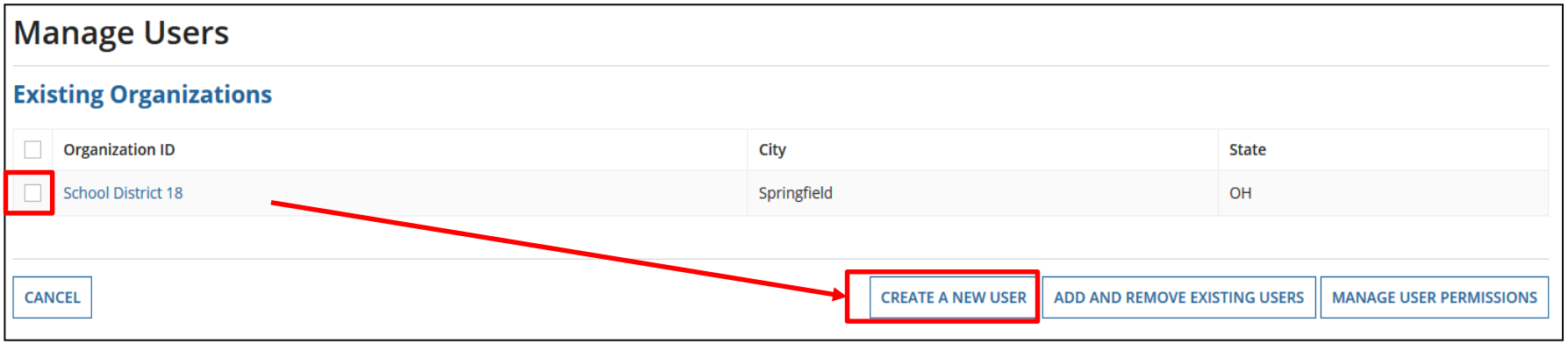
If not present, enter School and District IRN's, and click on "Submit"

Creating New Users

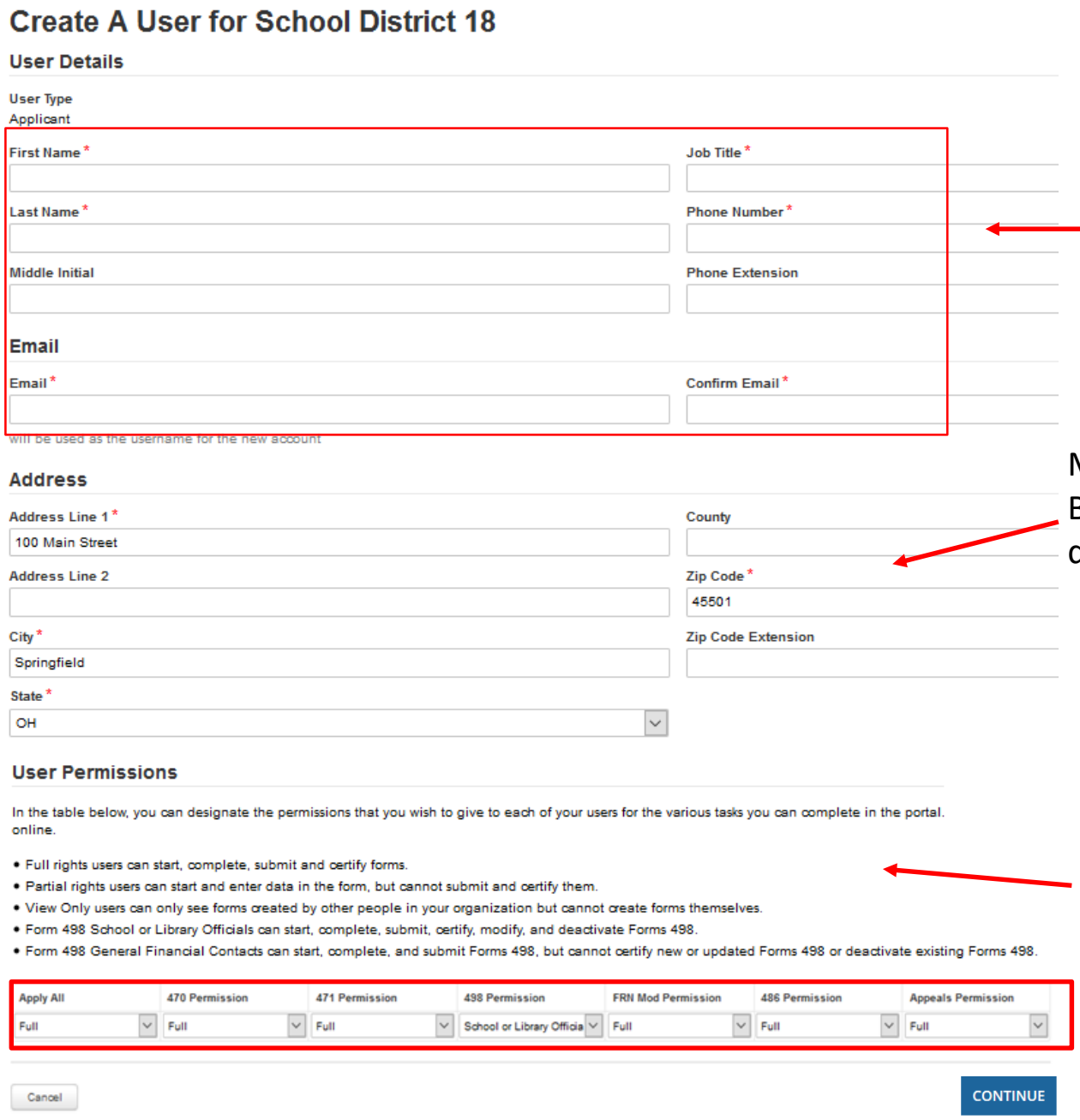


From the Landing Page, click on “Manage Users” and then select organization from the list.

Click on “Create New User”



Creating New User



Enter User Details

Modify address if necessary. The Billed Entity's address is listed by default.

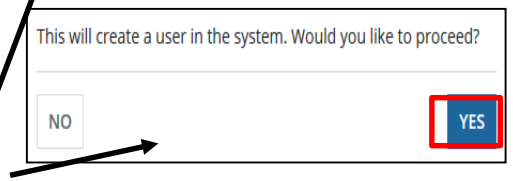
Select permissions for the new user, which are defined on the site.

You can assign rights per form, or choose "Apply All". For the Form 498, choose "School or Library Official" or "Financial Contact".

When done, click on "Continue"

Confirm New User

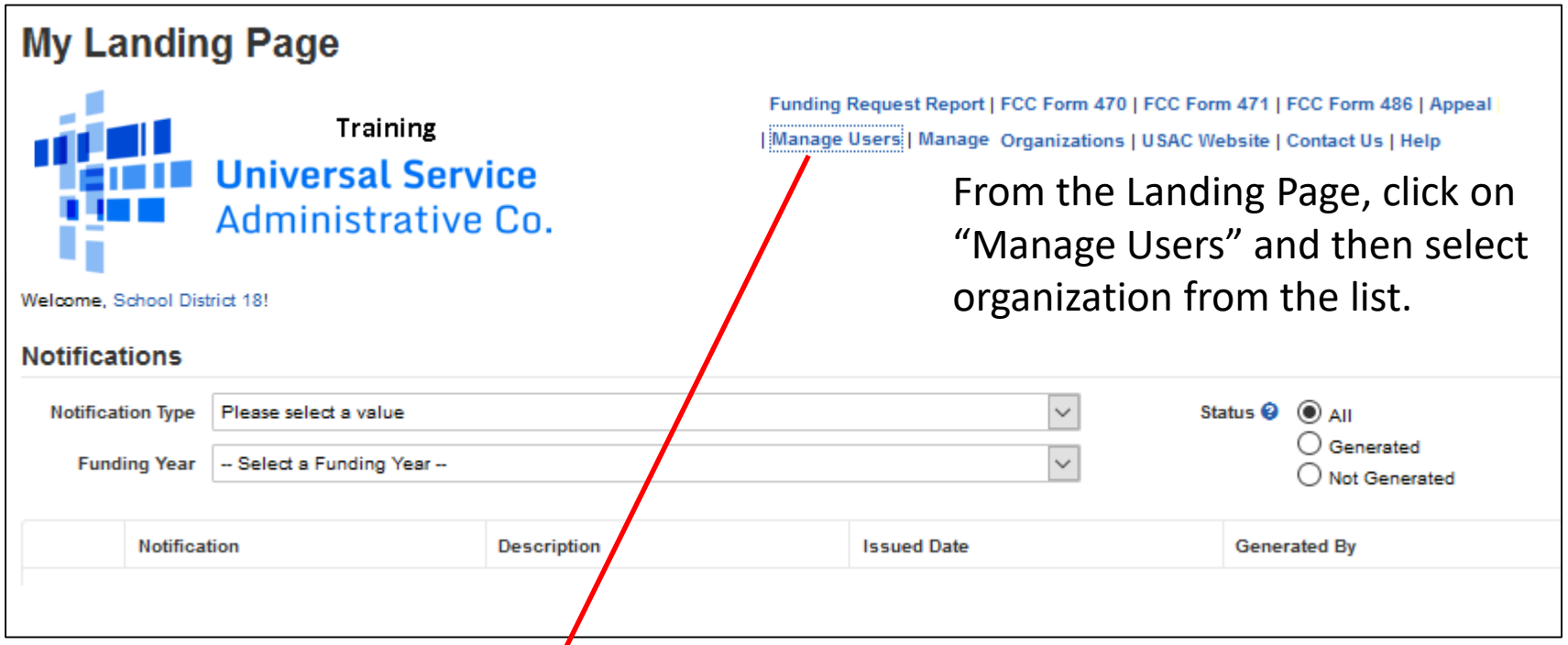
Confirm information and click on “Submit” and then “Yes” in the pop-up to proceed.



The new user will receive several emails prompting them to sign in to EPC, create a password, and accept the terms and conditions.

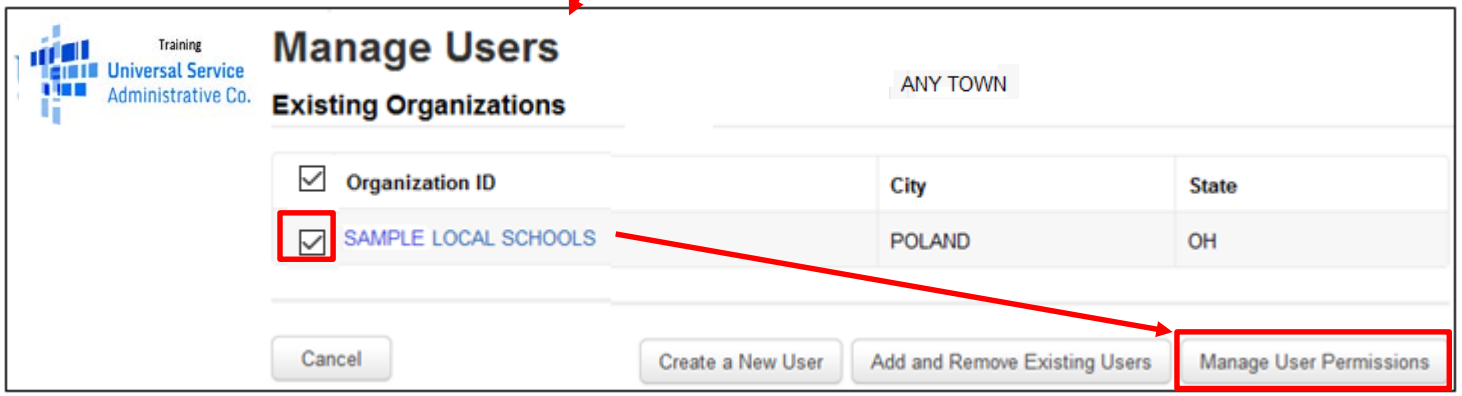
Note: The user must accept the terms and conditions before you can modify their role.

Managing User Permissions

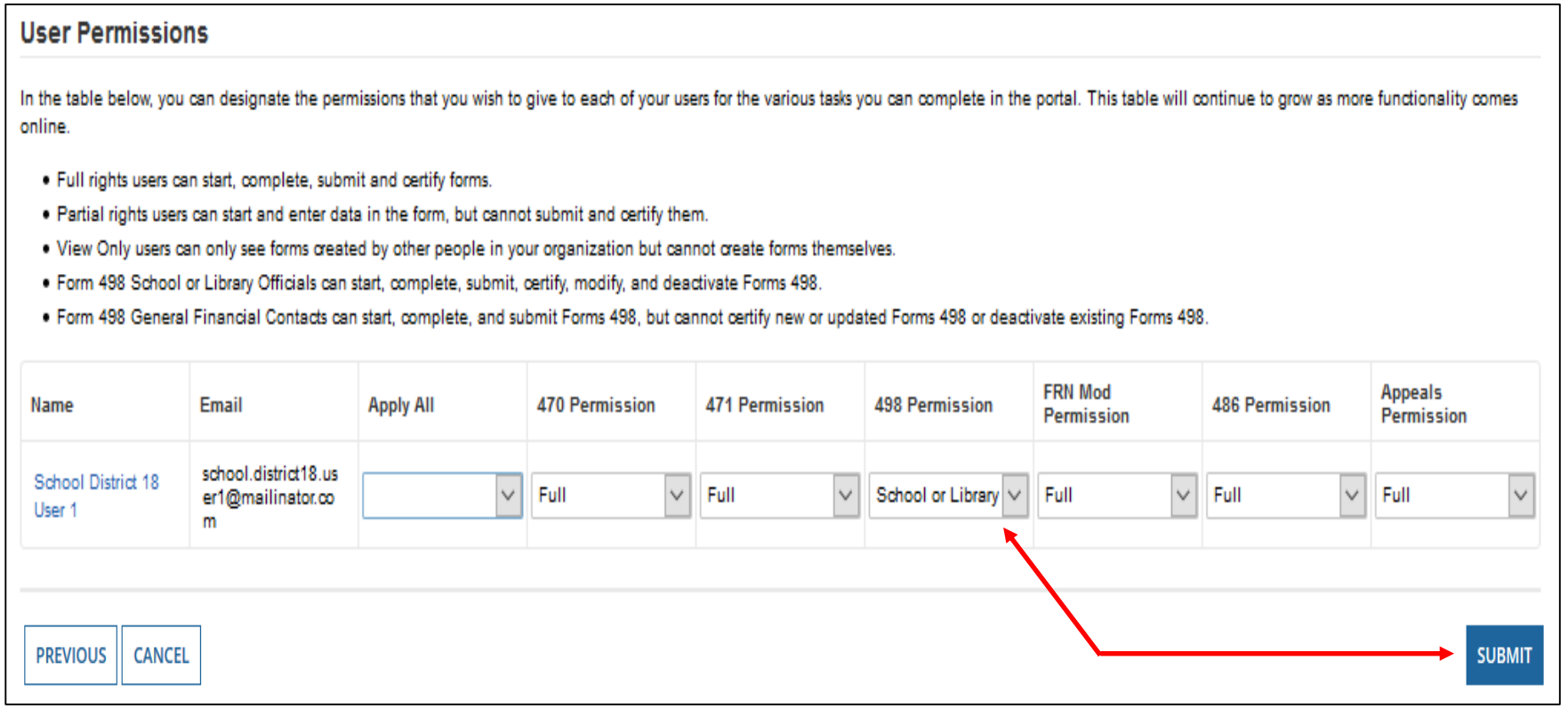


From the Landing Page, click on "Manage Users" and then select organization from the list.

Click on "Manage User Permissions"



Managing User Permissions

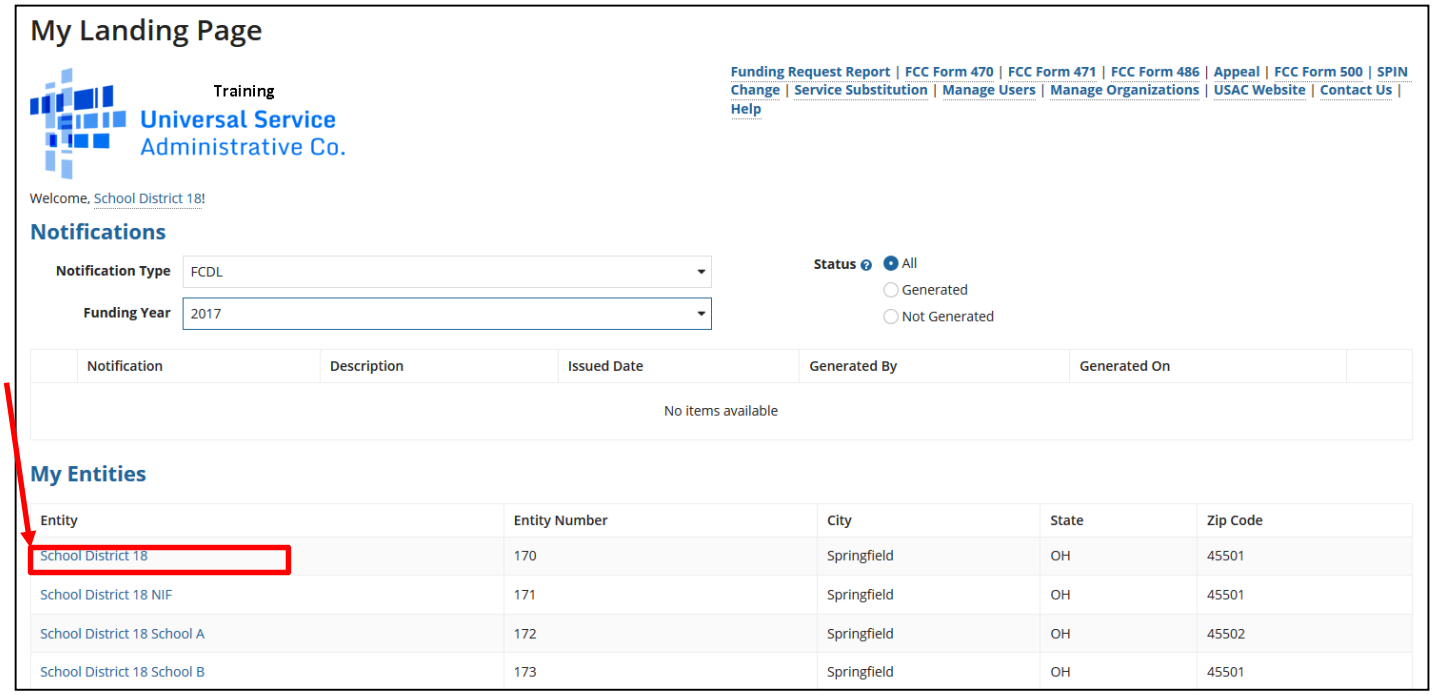


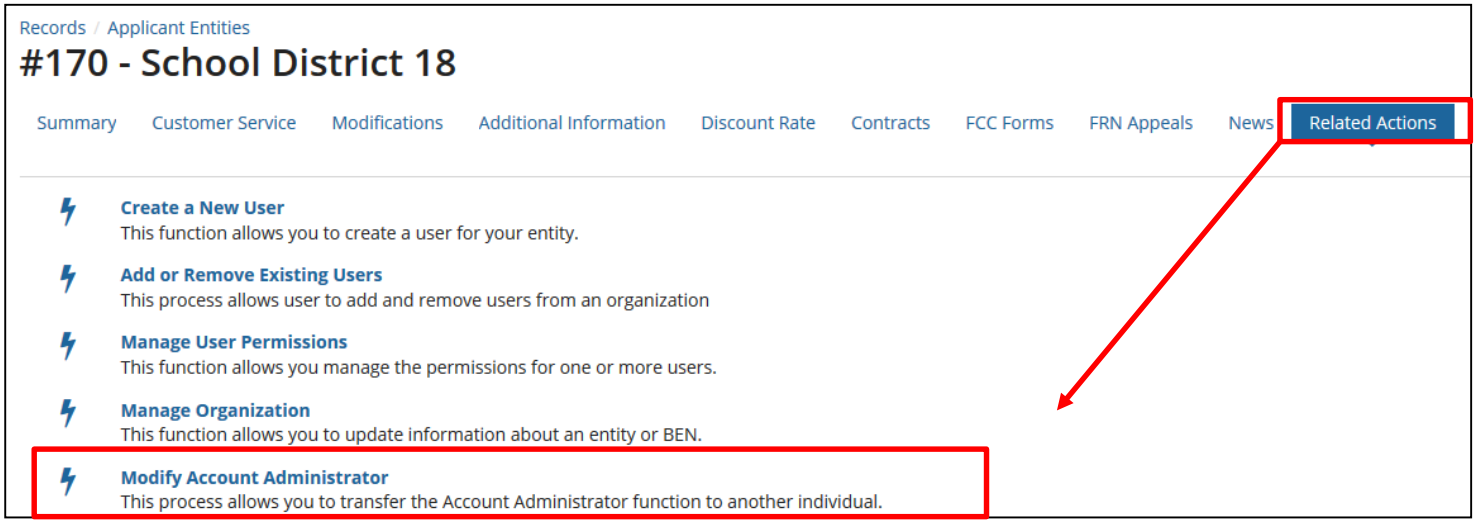
We see an explanation of the permissions available.

Use the drop-down menu to assign the correct permissions, and click on “Submit”.

Modify Account Administrator

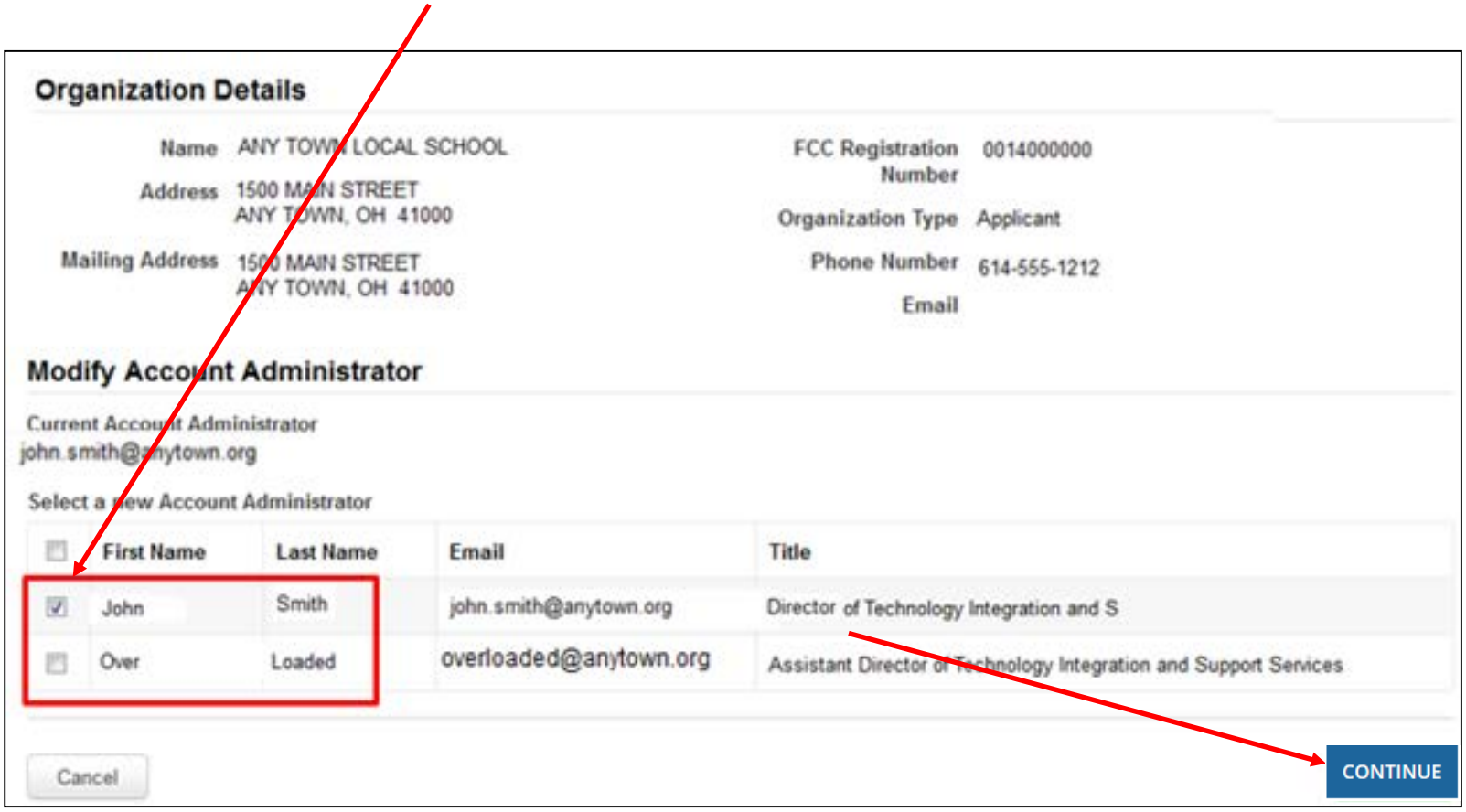
From your Landing Page, choose your Billed Entity organization, click on “Related Actions” and then Modify Account Administrator.





Modify Account Administrator

Uncheck the box to the left of the current user's name, and select the new administrator. Click on "Continue", confirm information, and then select "Submit".



Contact Information

E-Rate Support and Information

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www.ohio-k12.help/erate

Office: 740-223-2420
Cell: 740-253-1153