E-RATE

BOOTCAMP
in the West 2018

Hickory, NC July 24-26
Good Morning!!

• Welcome
• Introductions
• Housekeeping
• Website for resources: erate.fi.ncsu.edu
It’s Greek to Me!

• What is E-rate and why do we do it?
• FCC
  – USAC
    • CSB
• DPI
The Seasons of E-rate
What can I get?

• Start with what do you NEED!
  – [Digital Learning Plan](#) and Network Assessments

• [Eligible Services List](#)
  – Categories of Service (1 and 2)
    • What’s the difference?
What’s my discount?

- **Discount Matrix**
- Student Count & NSLP Eligibility
- Urban vs. Rural status
Log into the EPC portal please!
portal.usac.org/suite
How and When do I apply?

• EPC Overview
  – EPC Administrator and General Contact
  – My Profile
    • When, why, what to update
  – Navigating the portal
Am I ready?

• Account in EPC (admin, general contact)
• BEN/FCCRN
• Manage Connectivity Questions
• Manage Entities
• Updated Profile
So what is my first step?

File a Form 470—What is a 470?

- Formal request for goods and services
- “Request for Proposal” RFP
- Procurement Rules
- Competitive Bidding
- Cost Effective
What MUST I include?

• Be filed by Halloween or mid-November
• Be posted for at least 28 days
• Specify BEAR or SPI billing
• List all requirements for goods/services
• List all sites and addresses
• List evaluation criteria *** Price heaviest weight
• Specify when bids are due, how and to whom to be delivered
• Specify public bid opening day/time
Let’s file a Cat 1

470
Wrap Up and Review!!
Before we begin:
1. Log into portal
2. Open up our website
3. Create doc named CONTRACT and save as PDF
• Good Morning!
• **Let’s Review Day 1!**
  – Computer Kahoot.com
  – On your phone
My 470 is filed....
Contracts Module

- Purpose
- Where is it?
- How do I get my contract there?
- Let’s file a contract.
Ok, so now what?

File a Form 471

• Formal request for “funding” to pay for requests from 470.

• Have your Item 21 for category 2

• Have your contract costs ready for category 1
What is my next step?

Review your **Receipt Acknowledgement Letter**

- In EPC, your NEWS feed!
- Use it to file changes to 471
- Let’s file one!
Let’s file a Cat 1
What is this fiber stuff?

- Lit vs. Dark vs. Self Provisioned
Time for a Break!
What about Category 2?

• What is the difference between this and Cat1?
• Do I need to file a 470?
• How much money do I get?
• What is my process?
My C2 process as a NC School

Begin with your Budget in mind!

- **Number of students X Multiplier = FY Budget**
- **MINUS any C2 monies spent 2015-2018 (pre-discount)**

Example: 200 X $156.23 = $31,246.00

$31,246.00-$15,624.00=$15,622.00

Current Spent in 2017 Left to spend
Budget Exercise

- Sample Budget Spreadsheet
- USAC’s C2 Budget Lookup Tool
Now what?

• So I know how much money I have to spend..
  – Now determine what you need!
  – Refer to ESL
  – State contracts
  – Walkthrough needed?
## Component list

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<thead>
<tr>
<th>Line #</th>
<th>Name</th>
<th>Description</th>
<th>Designator</th>
<th>Quantity</th>
<th>Manufacturer</th>
<th>MPN1</th>
<th>Supplier</th>
<th>SN</th>
<th>Total Price</th>
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<td>2</td>
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<td>ST 373000mAh</td>
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<td>4</td>
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<td>0402 0603 5%</td>
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**Total Price:** $365.55

**C2-3**
It’s Minibid Time

• What is it?
• Why do I have to do it?
• What are some examples?

<table>
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<tr>
<th>CRITERIA</th>
<th>V1</th>
<th>V2</th>
<th>V3</th>
<th>V4</th>
<th>V5</th>
<th>V6</th>
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<tr>
<td>COST OF ELIGIBLE GOODS AND SERVICES (30 points)</td>
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<td>18</td>
<td>10</td>
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<td>20</td>
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<td>5</td>
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<tr>
<td>TOTAL (100 points)</td>
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<td>30</td>
<td>78</td>
<td>29</td>
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<td>32</td>
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Okay, I’ve chosen the vendor!

• **Write a Letter of Intent**
  – Request a formal quote
  – Request an Item 21
    • Upload into 471
Let’s file a Cat 2

471
Ok, it’s filed, now what?
Ok, so I passed the review...

Receive your **FCDL**

- Log into EPC to view FCDL
- Print both the notice and the spreadsheet
- Read both carefully
- Let’s look at one!
What does this mean?

- Your project got funded!
- You got the
Now it’s time to...
Not quite yet!
So what’s next?

Signal the start to services

• File the form 486
  – Starts services
  – CIPA compliance
  – Let’s file one!
Let’s get started!

calling all Vendors

- Cut your POs
- Order equipment
- Start installations
Work’s all done!

- What’s next?
  - Invoicing!

OR
• Service Provider Invoice
• Must notify vendor during 470 phase or as early as possible
• Pay only non-discounted portion
• Vendor bills E-rate for discounted portion
BEAR (Form 472)

- Must be filed in legacy system
- Must have **498 ID number**
- Must have **PIN**
- Must pay all of invoice
- Can file BEARs monthly, quarterly, 6 months, yearly
- Funds are EFT
- Let’s file a BEAR!
BEAR Training Site

Login Information

Use the following information to log in to the training site.

**BEN:** 145909

**PIN:** ocular#

**Email:** applicant@usac.org

**Last Name:** Smith
**BEAR Form Instructions**

For detailed instructions on how to complete a BEAR Form, refer to the [BEAR Form User Guide](#). Below are filing instructions specific to the BEAR training site:

1. Click on **New BEAR Form**.
2. In Item 3 (SPIN), enter 143666666.
3. Choose one of the Applicant FCC Form 498 IDs from the dropdown menu – **443013248** or **443002932**.
4. To create line items, use one or more entries from the list of [BEAR training site FRNs](#). These FRNs are not limited by funding year or dollar amount and can be used over and over.
• **Invoice Deadline Extension Request**
  
• Deadline to file 120 days after last day of service

• File IDER

• Additional 120 days to invoice
Wrap Up!
LETS GO HOME
AND ENJOY THE LIFE!!!
Before we begin:

1. Log into portal
2. Open up our website
Post Commitment

• Form 500
• SPIN Changes
• Service Substitutions
Program Compliance

• Audits
  – PQA
  – SRIR (Selective Review)
  – Cost Effectiveness Review

• Document Retention

• Asset Inventory- SAMPLE

• COMADS

• Appeals
AM I DONE YET?

THIS IS SOOO HARD!
3 year cycle...always!
I AM NOT DONE YET.
What’s next?

• 470 Training in the fall….watch your email!
  – Who needs this?
• Questions???
That's all Folks!