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E-rate Process Overview

The E-rate program provides discounts on certain services and products that are essential for classrooms and libraries to receive Internet connections. The amount of discount depends on the level of poverty and location of the entity receiving service. The discount ranges from 20% to 90% of the cost of eligible services.

1. Applicant files FCC Form 470 to announce that they are seeking E-rate support to purchase eligible goods and services. The applicant will also need to comply with all local and state procurement rules and regulations.
 - a. When Form 470 is posted to the EPC, a 28-day period begins in which interested service providers may submit proposals and bids to provide service to the applicant.
 - b. After the 28 day posting period, the applicant reviews the bids and proposals, selects a service provider, and signs a contract or service agreement.
2. Then the applicant submits FCC Form 471 which tells USAC which service provider was selected, the goods and services for which the applicant will be requesting E-rate support, and the costs of those goods and services.
 - a. USAC issues a Receipt Acknowledgment Letter* (RAL) to both the applicant and the service provider(s) in EPC after the applicant certifies their in-window FCC Form 471.
 - b. USAC will review the application to substantiate that the requests are for eligible services that will be delivered to eligible locations and students/patrons.
 - c. Once the application has been approved, USAC will issue a Funding Commitment Decision Letter (FCDL)**.
3. Applicant files Form 486 to signify that the approved services are being delivered and that the applicant is complying with the Children's Internet Protection Act.
 - a. USAC issues Form 486 Certification Letter after review and certification of the filed Form 486.
4. Applicant files Form 472 to request reimbursement from USAC for the discount costs of the eligible products or services that the applicant has received and paid for in full, or the Service Provider files Form 474 to request reimbursement from USAC for the discount amount for eligible services and equipment provided to the applicant.

***RAL "Request Acknowledgment Letter"** - The RAL confirms that the applicant's FCC Form 471 was successfully submitted and certified.

****FCDL "Funding Commitment Decisions Letters"** - Funding Commitment Decisions Letters ("FCDLs") are provided to all applicants that have submitted a valid Form 471. For most applicants, FCDLs summarize the E-rate funds that have been committed and set aside for discounts that had been requested on eligible services. The FCDL lists a separate decision for each request made in the associated Form 471. In some unfortunate cases, a letter indicates rejections or removal of requested discounts on services deemed ineligible.

E-Rate Forms - Applicants

Form 470 "Description of Services Requested and Certification Form"

Purpose - FCC Form 470 "Description of Services Requested and Certification Form" is the first form that must be filed by a school or library in the E-rate application process. Its primary purpose is to briefly describe the applicant, provide a point of contact, and indicate any new telecommunications and technology services that the applicant will be seeking. Much of the information requested is designed to be useful to, and to be made available to, potential vendors.

The important aspect of submitting a Form 470 is that it be filed well before actual contracts, upon which E-rate discounts will be requested, are signed.

Specific discount requests will be made on a second form, FCC Form 471, which should be filed before the end of the application window period for the next funding year. Timing is important because, before new contracts can be signed, the initial Form 470 must be received by the SLD and posted in the SLD's E-rate Productivity Center ("EPC") for at least 28 days.

The rules for determining the eligibility of existing and new contracts for E-rate purposes are quite precise and must be carefully followed.

Where To File - The FCC Form 470 can be filed for a particular funding year as soon as USAC posts a notice to that effect on this website. This notice is generally posted about 12 months before the start of a funding year.

Note: If an RFP is issued, it must be uploaded as part of the online FCC Form 470 filing process.

Deadline: The FCC Form 470 must be certified in EPC at least 28 days before the close of the FCC Form 471 filing window for the funding year in which services are requested.

How to File - The FCC Form 470 must be filed online in the EPC. Applicants will create a profile and login information in the EPC system before filing the FCC Form 470.

For step-by-step filing guidance, watch the [FCC Form 470 video series](#) or use the [FCC Form 470 User Guide](#).

Form 471 "Description of Services Ordered and Certification Form"

Purpose - FCC Form 471 "Description of Services Ordered and Certification Form" is the second form that must be filed by a school or library in the E-rate application process. Its purpose is to individually list all contracts and services for which the applicant is requesting discounts. To have any chance of being approved, Form 471 must be submitted within the USAC's application window period.

Applicants file an FCC Form 471 to request discounts on eligible services and equipment for the upcoming funding year. Applicants must include information on the recipients of services and service provider(s); provide detailed descriptions of services including costs and dates of service or equipment; and certify compliance with program rules.

Discount rates should be based on student ***eligibility*** for the National School Lunch Program, not simply on student participation.

Where To File - Applicants can file the FCC Form 471 in the E-rate Productivity Center (EPC) during the specific application filing window each year. Each year, in advance of the filing window, USAC announces the exact dates and times of the filing window on USAC's website.

Note: Applicants cannot certify the FCC Form 471 before the Allowable Vendor Selection/Contract Date (ACD), which is 28 days after your FCC Form 470 is certified in the EPC.

How to File - Applicants must file the FCC Form 471 online in EPC.

If applicants do not have an account in EPC, call the Client Service Bureau (CSB) at (888) 203-8100.

For step-by-step filing guidance on the FCC Form 471, watch the [FCC Form 471 video series](#).

Form 486 "Receipt of Service Confirmation and Children's Internet Protection Act Certification Form"

Purpose - Applicants file an FCC Form 486 to:

- Notify USAC that services have started for the recipients of service included on one or more funded Funding Request Numbers (FRNs).
- Indicate the status of compliance with the Children's Internet Protection Act (CIPA) for the recipients of service for the FRN(s).

Form 486 can be submitted only after receiving a Funding Commitment Decisions Letter ("FCDL").

Where To File - Applicants cannot file the FCC Form 486 for an FRN until USAC issues a Funding Commitment Decision Letter (FCDL) with a positive funding commitment.

Deadline: FCC Form 486 must be certified no later than 120 days after the service start date shown on the FCC Form 486 or 120 days after the date of the FCDL, whichever date is later.

Note: Improperly filed Forms can be cancelled and re-filed.

How to File - For step-by-step filing guidance on the FCC Form 486, watch the [FCC Form 486 video series](#).

Other Applicant FCC Form

Form 472 "Billed Entity Applicant Reimbursement (BEAR) Form"- Applicants file an FCC Form 472 (Billed Entity Applicant Reimbursement (BEAR) Form) to request reimbursement from USAC for the discount costs of the eligible products or services that the applicant has received and paid for in full.

Form 479 "Certification by Administrative Authority to Billed Entity of Compliance with the Children's Internet Protection Act" - provides notification to a Billed Entity by an Administrative Authority of the status of the Administrative Authority's compliance for the purposes of CIPA. The Billed Entity will then certify on its FCC Form 486, Receipt of Service Confirmation and Children's Internet Protection Act Form that it has collected duly completed and signed FCC Forms 479 from Administrative Authorities that the Billed Entity represents.

Form 498 "Service Provider and Billed Entity Identification Number and General Contact Information Form" - The FCC Form 498 is used to collect contact, remittance, and payment information for service providers and applicants that receive support from the federal universal service programs. In addition, all Schools and Libraries (E-rate) Program applicants (billed entities) receiving payments via the Billed Entity Applicant Reimbursement (BEAR) process need to file the FCC Form 498 in the E-rate Productivity Center (EPC) to receive payment.

Form 500 "Adjustment to Funding Commitment and Modification to Receipt of Service Confirmation Form"

FCC Form 500, Adjustment to Funding Commitment and Modification to Receipt of Service Confirmation Form, is a form that can be filed by an applicant:

- To adjust the funding year Service Start Date reported on a previously filed FCC Form 486
- To adjust the contract expiration date listed on the FCC Form 471
- To cancel a Funding Request Number (FRN)
- To reduce the amount of an FRN
- To request a service delivery extension request for Category 2 equipment or special construction fiber projects
- To notify USAC of an equipment transfer resulting from the closure of the location where the equipment was originally installed

E-rate Eligible Services List

Category One Services

Starting in Funding Year 2019, Voice Services are no longer eligible.

Data Transmission Services and/or Internet Access

This service type covers broadband connectivity and basic conduit access to the internet. These services cannot include charges for content, end-user devices or equipment purchases (other than those necessary for transmission of Category One services), or other services beyond basic conduit access to the internet. This service type also includes leased lit fiber, leased dark fiber, and self-provisioned broadband networks.

Category Two Services

Internal Connections and Managed Internal Broadband Services (MIBS)

These two service types include eligible products, such as access points, routers, switches, hubs, and wiring.

Eligible products are located at the applicant site and must be necessary to transport information to classrooms or publicly accessible areas of a library.

Services provided by a third party for the operation, management, and monitoring of eligible broadband internal connections components are eligible MIBS (e.g., managed Wi-Fi). Program support is limited to eligible expenses or portions of expenses that directly support and are necessary for the broadband connectivity within schools and libraries.

Applicants may lease equipment as a part of an internal connections request or a MIBS request.

Basic Maintenance of Internal Connections (BMIC)

BMIC covers the repair and upkeep of eligible internal connections. Eligible repair and upkeep services include hardware, wiring, and cable maintenance, along with basic technical support and configuration changes. The products must be eligible for discounts in order for their associated repair and upkeep services to be eligible.

In general, applicants may only receive support for actual work performed under contract on eligible products and parts that are repaired or replaced. Unbundled warranties or fixed price contracts are not eligible for reimbursement, unless the ineligible portions of the warranty or contract can be cost-allocated.

Services such as software upgrades and patches, (including bug fixes and security patches), and online and telephone-based technical assistance and tools that are typically standard fixed priced offerings will continue to be funded as BMIC if the service or equipment would only function and serve its intended purpose with the degree of reliability ordinarily provided with these specific services.

Other Eligibility Issues

Mixed Eligibility

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

In general, a [cost allocation](#), separating the eligible and ineligible costs, is required if a product or service:

- Contains both eligible and ineligible components — for example, a data T1 circuit (eligible) that also has channels on the circuit dedicated to voice services (ineligible);
- Is put to both eligible and ineligible uses — for example, a server that is used for both caching (eligible) and video distribution (ineligible); or
- Is delivered to both [eligible and ineligible locations](#) — for example, broadband service delivered to a school run by a church (eligible) and to the church office (ineligible).

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

Ancillary Use

If a product or service contains ineligible features on an ancillary basis that are not offered or priced separately, [ancillary use](#) of these ineligible features may not require a cost allocation if they meet certain requirements.

<https://www.usac.org/e-rate/applicant-process/before-you-begin/eligible-services-list/>

E-rate Program Timetable and List of Deadlines

Form or Event	Deadline or Dates
Funding Year	July 1 through the following June 30 (Non-recurring services can be delivered and installed through September 30.)
FCC Form 470	Certified at least 28 days before the filing of the FCC Form 471, keeping in mind (1) the timeframe for compliance with all competitive bidding requirements and (2) the FCC Form 471 application filing window opening and closing dates
FCC Form 471 Window	Generally opens 5-6 months before the start of the funding year (Exact dates for each funding year will be posted on the website.)
FCC Form 471	Certified no later than 11:59 p.m. ET on the day of the close of the FCC Form 471 application filing window (Exact date will be posted on the website.)
FCC Form 486	Certified no later than 120 days after the date of the Funding Commitment Decision Letter or 120 days after the Service Start Date, whichever is later
FCC Form 498	Certified by the applicant and approved by USAC once for each of the billed entity's associated banking account(s) before an applicant can receive reimbursements via the BEAR method
FCC Form 472 (BEAR) FCC Form 474 (SPI)	Submitted no later than 120 days after the date of the FCC Form 486 Notification Letter or 120 days after the last date to receive service, whichever is later
Appeals	Submitted no later than 60 days after the date of USAC's decision letter

E-rate Training

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DPI Contact for E-rate Questions - <https://dpi.wi.gov/erate> or contact Rachel Schemelin at rachel.schemelin@dpi.wi.gov or 608-266-5190