2018 Boot Camp in the West

July 24-26, 2018

Training Agenda

Website: erate.fi.ncsu.edu

**Day 1 – Tuesday, July 24**

Welcome, Introductions, Housekeeping

What is E-rate and why do we do it?

* FCC/USAC/CSB/DPI

The Seasons of E-Rate

How do I know what will be paid for?

* Start with a plan – Digital Learning Plan
* Eligible Services List
* Categories of Service (1 and 2)

How do I know what I am eligible for?

* Discount Matrix
* Student Count & NSLP Eligibility
* Urban vs. Rural status

**BREAK**

How and where do I apply?

* EPC Overview
  + EPC Administrator and General Contact
  + My Profile
    - When, why, what to update
  + Navigating the portal
* What to have in place before I apply?
  + Account in EPC
  + BEN/FCCRN
  + Manage Connectivity Questions
  + Manage Entity Module

Updated Profile

**LUNCH ON YOUR OWN**

The Application Process

1. File the 470 (RFP) -- Must use when you need a new contract/service (i.e., WAN)

470=Request for a service or goods!

* Procurement rules – state and local
* Reimbursement mode? BEAR or SPI (form 498)
* Competitive bidding rules
  + 28 days, sealed bids, public bid opening, narratives, evaluation matrix, cost effectiveness, PRICE heaviest weight
* Site names and addresses required in narrative in FY2019.
* Happy Halloween!

**BREAK**

* Let’s create a 470 for WAN!
  + From Posting to Evaluation and Signing Contracts!

**DAY 2 – Wednesday, July 25, 2018**

Good Morning and Review of Day 1

Application Process Continued

1. Contracts Module
2. File the 471

471=Request for funds to pay for service or goods!

* Let’s create a 471 for WAN!
* Special Topic: Lit Fiber, Dark Fiber, Self-Provisioned Fiber

1. Review the RAL

* File changes if necessary

**BREAK**

Category 2 – Internal Connections

My Process as a NC school!

* Budgets
  + How are they determined?
  + USAC Budget Tool
  + Calculate your own (spreadsheet tool)
* What do I need? Walkthrough needed?

**LUNCH ON YOUR OWN**

* Minibid
* Letter of Intent
* Formal Quote
* Item 21
* File 471

Now that I have filed the 471….

1. PIA Review
   * Where
   * What
   * Why
   * When
2. Receive FCDL
3. File Form 486
   * Starts services
   * CIPA compliance
   * Let’s file one!

**BREAK**

1. Invoicing
   * BEARs
     1. Let’s file a BEAR (Form 472)
   * SPI Billing
   * IDER

**DAY 3 – Thursday, July 26, 2018**

Good Morning and Review of Day 2

Post Commitment

* Form 500
* SPIN Changes
* Service Substitutions

Program Compliance

* PQA
* Selective Review (SRIR)
* Audits
* Document Retention
* Asset Inventory

The Commitment Adjustment (COMAD)

Appeals