



Hickory, NC July 24-26



Good Morning!!

E-RATE

- Welcome
- Introductions
- Housekeeping
- Website for resources: erate.fi.ncsu.edu



It's Greek to Me!

E-RATE

- What is E-rate and why do we do it?
- FCC
 - USAC
 - CSB
- DPI



The Seasons of E-rate



What can I get?

E-RATE

- 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?

E-RATE

- [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?

E-RATE

- EPC Overview
 - EPC Administrator and General Contact
 - My Profile
 - When, why, what to update
 - Navigating the portal



Am I ready?

E-RATE

- Account in EPC (admin, general contact)
- BEN/FCCRN
- Manage Connectivity Questions
- Manage Entities
- Updated Profile



LUNCH BREAK

The logo features the words 'LUNCH' and 'BREAK' in a bold, yellow, 3D-style font with black outlines. The word 'BREAK' is partially enclosed by a large, gold-colored circular ring. Inside this ring, there is a red key icon pointing upwards.

So what is my first step?

E-RATE

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?

E-RATE

- 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

E-RATE

470



Wrap Up
and
Review!!

NK





day2

Before we begin:

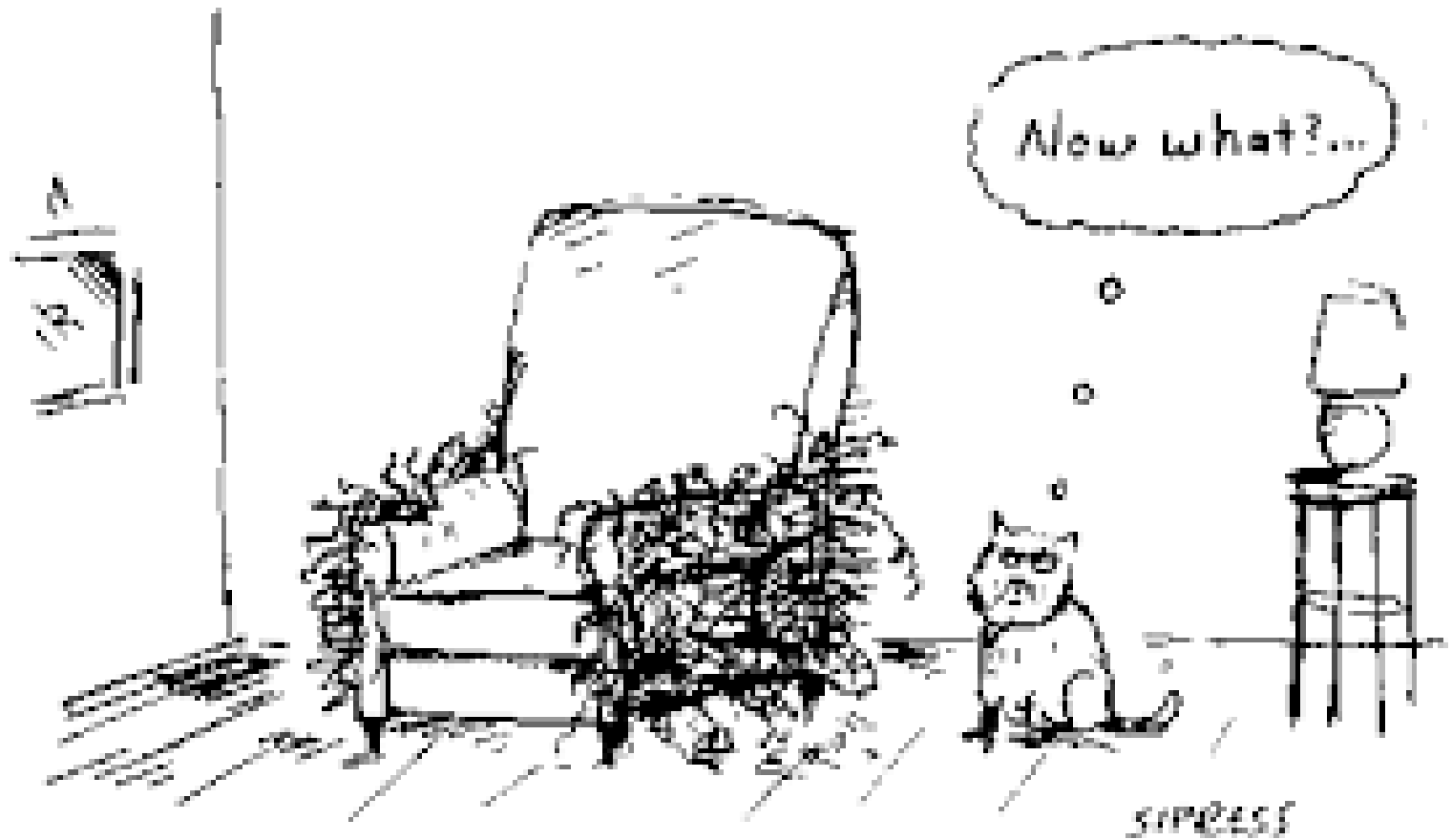
1. Log into portal
2. Open up our website
3. Create doc named CONTRACT and save as PDF

- Good Morning!
- [Let's Review Day 1!](#)
 - Computer Kahoot.com
 - On your phone



My 470 is filed....

E-RATE



Contracts Module

E-RATE

- Purpose
- Where is it?
- How do I get my contract there?
- Let's file a contract.



Ok, so now what?

E-RATE

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?

E-RATE

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

E-RATE

471



What is this fiber stuff?

E-RATE

- Lit vs. Dark vs. Self Provisioned





What about Category 2?

E-RATE

- 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

E-RATE

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

\$31246.00 - \$15,624.00 = \$15622.00

Current

Spent in 2017

Left to spend

C2-1



Budget Exercise

E-RATE



- [Sample Budget Spreadsheet](#)
- [USAC's C2 Budget Lookup Tool](#)



Now what?

E-RATE

- So I know how much money I have to spend..
 - [Now determine what you need!](#)
 - Refer to ESL
 - State contracts
 - Walkthrough needed?

C2-2



BOM (aka Bill of Materials)

E-RATE

Component list											Bill of Materials For BOM Document [SupplyChain.BomDoc]	Altium
Source Data From:			SupplyChain.BomDoc									
Project:			SupplyChain.PrjPCB									
Variant:			None									
Currency:			USD									
Report Date:			15-Sep-17		1:40:22 PM							
Print Date:			15-Sep-17		1:40:24 PM							
Line #	Name	Description	Designator	Quantity	Manufacturer1	MPNI	Supplier1	SPNI	SUP1	Total Price		
1	Custom row	DescriptionField	DesField	6						0		
2	Battery Packs LI-POLYMER BATTERY 3.7V 2000mA	Multicell Battery	BT1	1						0		
3	Battery	Multicell Battery	BT2	1	mikroElektronika	MIKRDE-1120	Mouser	932-MIKRDE-1120	13.9	13.9		
4	Battery	Multicell Battery	BT3	1	Danaher Fluke	BP1730-BATTERY	Mouser	676-BP1730-BATTERY	49.99	49.99		
5	CAP 680pF 10V 01005(0402)	CAP 680pF 10V ±10% 01005 (0402 Metric) Thickness 0.22mm SMD	C1	1	TDK	C0402X7R1A681K	Mouser	810-C0402X7R1A681K	0.08	0.08		
6	1uF	Polarized Capacitor (Radial)	C2	1						0		
7	10uF	Polarized Capacitor (Radial)	C10	1	Kyocera AVX	TAJB106K020R	Arrow	TAJB106K020R**MULT1	0.42	0.42		
8	CAP 2.4pF 16V 01005(0402)	CAP 2.4pF 16V ±0.1pF 01005 (0402 Metric) Thickness 0.22mm SMD	C11	1	TDK	C0402C0G1C2R4B	Digi-Key	445-5427-6-ND	0.18	0.18		
9	2.4pF	Capacitor	C12	1	Murata	GJM1555C1H2R4CB01D	Mouser	81-GJM1555C1H2R4CB1D	0.03	0.03		
10	10uF	Polarized Capacitor (Radial)	C4, C5	2	Vishay Sprague	TR3A106K016C1700	Newark	46R1115	0.45	0.9		
11	Buzzer	Magnetic Transducer Buzzer	LS1	1	Murata	PKLCS1212E2000-R1	RSCComponents	7926158	0	0		
12	1K8 tz 0201(0603)	1K8 0.05W tz 0201(0603 Metric) SMD	R1	1	Yageo	RC0201FR-071K8L	Mouser	603-RC0201FR-071K8L	0.03	0.03		
									TOTAL PRICE	\$65.53		

C2-3



It's Minibid Time

E-RATE

- What is it?
- Why do I have to do it?
- [What are some examples?](#)

CRITERIA	V1	V2	V3	V4	V5	V6	V7
HARDWARE COMPATIBILTY (15 points)	3	3	15	3	15	3	3
SUPPORT COMPATIBILITY (15 points)	1	1	15	1	15	1	1
RELEVANT REFERENCES (10 points)	5	0	10	10	6	5	8
PRIOR EXPERIENCE (10 points)	0	0	0	0	0	0	0
COST OF ELIGIBLE GOODS AND SERVICES (30 points)	19	21	18	10	30	18	28
COST OF INELIGIBLE GOODS AND SERVICES (20 points)	5	5	20	5	20	5	5
TOTAL (100 points)	33	30	78	29	86	32	45

C2-4



Okay, I've chosen the vendor!

E-RATE

- Write a Letter of Intent
 - Request a formal quote
 - Request an Item 21
 - Upload into 471

C2-5



Let's file a Cat 2

E-RATE

471



Ok, it's filed, now what?

E-RATE



Ok, so I passed the review... **E-RATE**

Receive your [FCDL](#)

- Log into EPC to view FCDL
- Print both the notice and the spreadsheet
- Read both carefully
- Let's look at one!



© Can Stock Photo - csp16200724

What does this mean?

E-RATE

- Your project got funded!
- You got the



Now it's time to...

E-RATE



Not quite yet!

E-RATE



So what's next?

E-RATE

Signal the start to services

- File the form 486
 - Starts services
 - [CIPA compliance](#)
 - Let's file one!



Let's get started!

E-RATE

calling all
Vendors

- Cut your POs
- Order equipment
- Start installations





Work's all done!

E-RATE

- 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)

E-RATE

- 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

E-RATE

Login Information

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

BEN: 145909


PIN: ocular#


Email: applicant@usac.org

Last Name: Smith

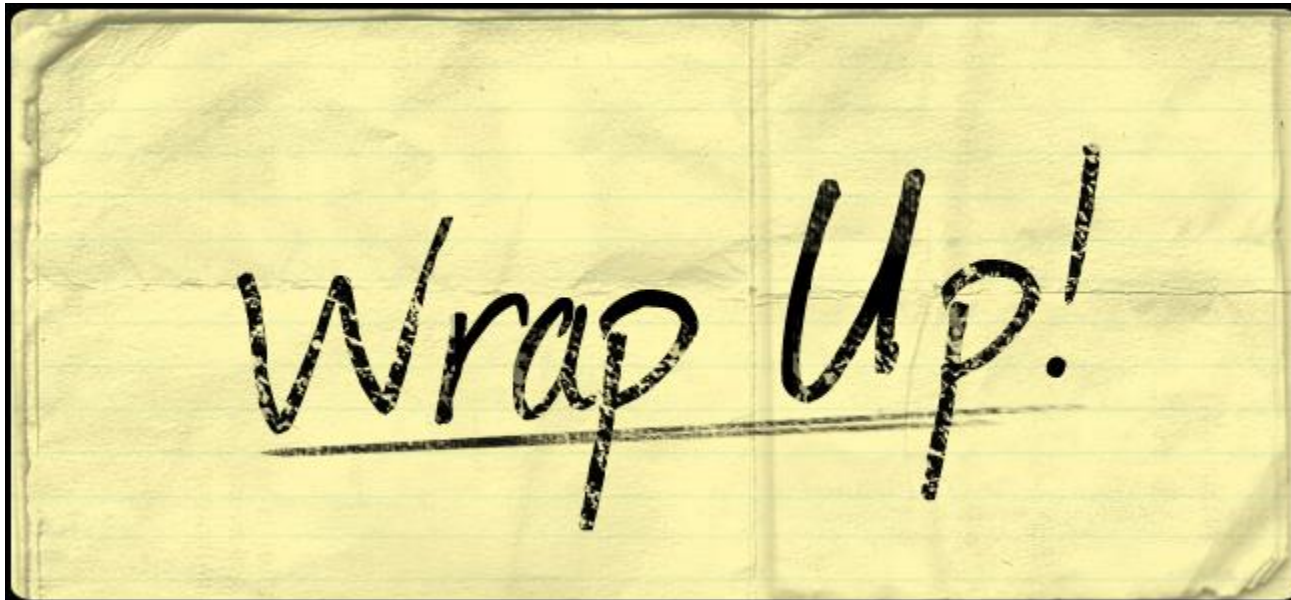


BEAR Form Instructions

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







Before we begin:

1. Log into portal
2. Open up our website

FORM

E-RATE



Post Commitment

E-RATE

- Form 500
- SPIN Changes
- Service Substitutions



Program Compliance

E-RATE

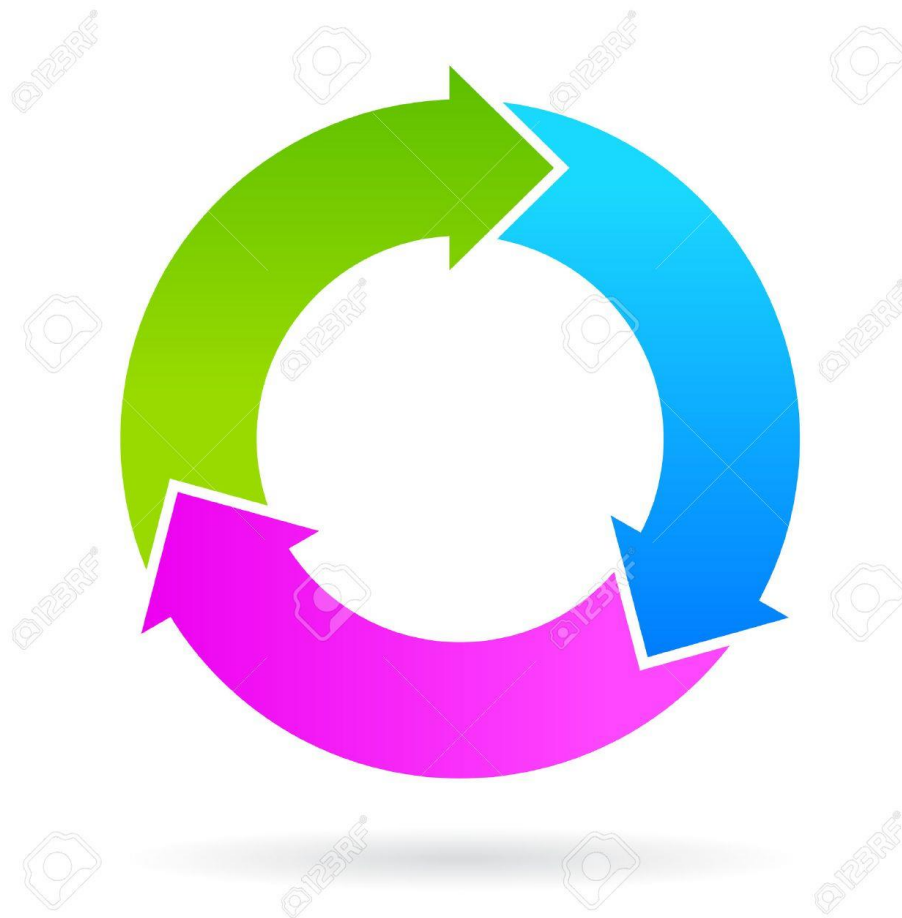
- Audits
 - PQA
 - SRIR (Selective Review)
 - Cost Effectiveness Review
- Document Retention
- Asset Inventory- [SAMPLE](#)
- COMADS
- Appeals





3 year cycle...always!

E-RATE





What's next?

E-RATE

- 470 Training in the fall....watch your email!
 - Who needs this?
- Questions???



That's all Folks!