

Creating a Contract for Category 1

Step-by-Step for Uploading in the
EPC portal



*Complete this task BEFORE
beginning a Form 471 if
you are requesting
funding for a contracted
service.*

The Basics

Do I have to use the contracts module?

E-RATE

During the creation of a Form 471, you will indicate for each FRN how you will be purchasing the requested services:

FRN Contract

How are the services for this FRN being purchased?

Contract information is stored in your Profile; you can add a new Contract at any time. Details about your Tariff and Month-to-Month services will be entered in your FRN.

- Contract

Yes: If you indicate that the FRN is for contracted services, you will be prompted during the process to refer back to a contract that is listed in the contracts module

- Month-to-Month

No: The contracts module is not required for that FRN

- Tariff

A tariffed service is a telecommunications service that you purchase at rates regulated by the state regulatory commission and/or the FCC, for which you do not have a signed, written contract.

No: The contracts module is not required for that FRN



When do I use the contracts module?

E-RATE

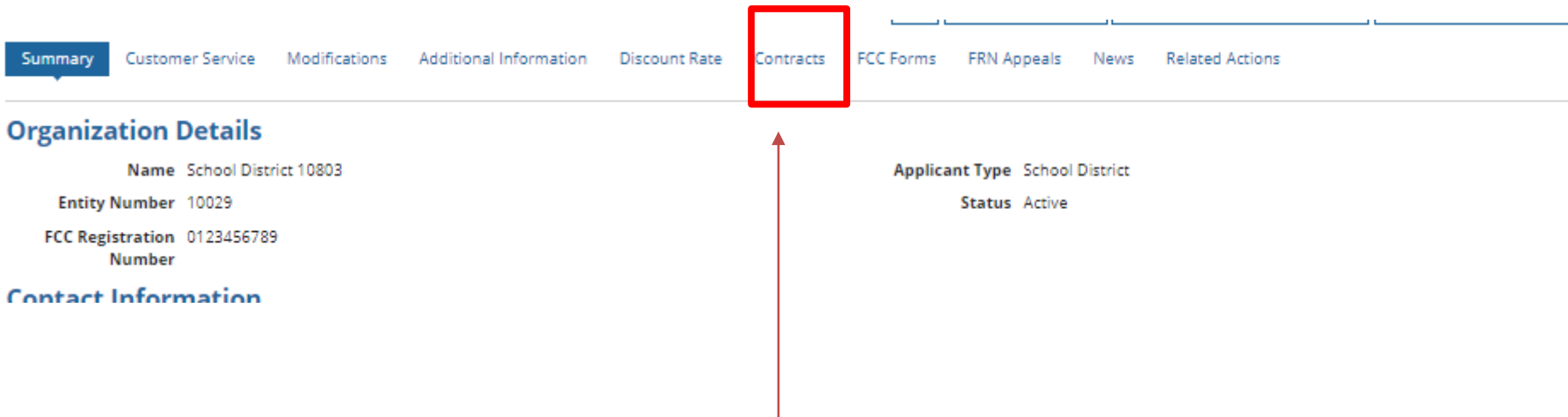
- Any NEW contracts signed must be uploaded into the EPC Contract module
 - This creates a Contract ID for you to use when you create your 471
- Any CURRENT contract that is being extended does NOT need to be re-uploaded
 - Simply talk about the extension in the narrative



Where is the contracts module?

E-RATE

- From My Applicant Landing Page, click on the
 - “Welcome xxx !” hyperlink
 - Below is the “Summary” page where you will find the hyperlink to the Contracts Module

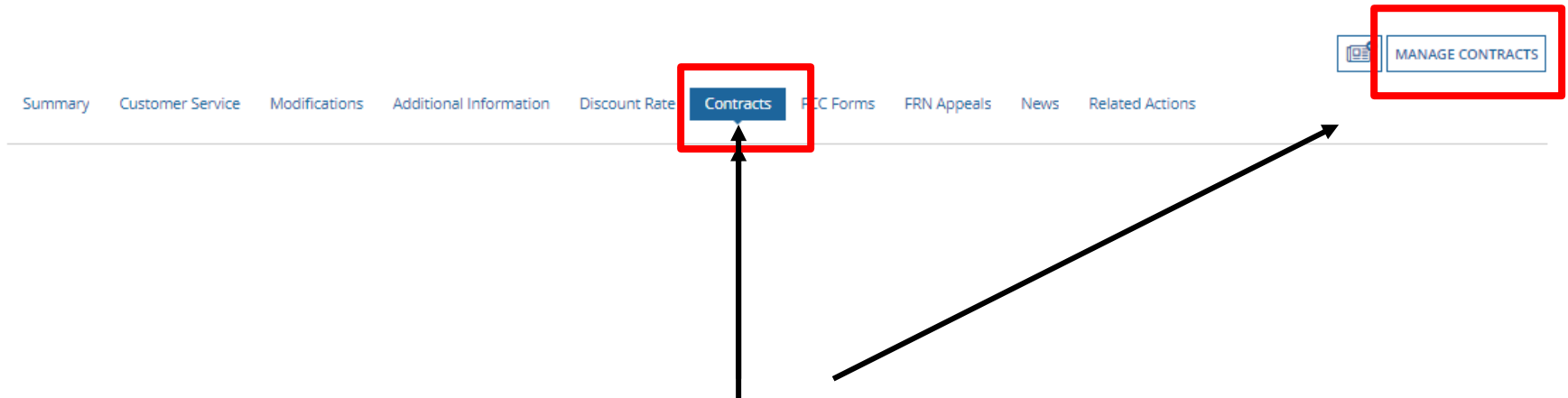


The screenshot shows a navigation menu with the following items: Summary, Customer Service, Modifications, Additional Information, Discount Rate, Contracts, FCC Forms, FRN Appeals, News, and Related Actions. The 'Contracts' link is highlighted with a red square. Below the navigation menu, there are two sections: 'Organization Details' and 'Applicant Type'. The 'Organization Details' section includes: Name School District 10803, Entity Number 10029, and FCC Registration Number 0123456789. The 'Applicant Type' section includes: School District and Status Active. A red arrow points from the bottom of the 'Contracts' link to the 'Applicant Type' section.

The Contracts Module

Manage Contract button

E-RATE



Click on the “Contracts” link in the menu of items across the center of the organization’s page. Then choose **MANAGE CONTRACTS**

Add New Contract button

E-RATE

Use the dropdown to select the type of contract you would like to edit or remove. Click the Add a New Contract button at any time to create a new contract for your organization.

Contract Type

My Contract Drafts

You have no contract drafts for this organization. Click the Add a New Contract button to create a new contract.

CLOSE

ADD A NEW CONTRACT

EDIT

DELETE

Click on the “Add a New Contract” button



Contract Information

Nickname and Contract Number

E-RATE

School District 10803 (BEN: 10029) - WAN Contract 1819-2122 - Contract ID #

Contract Information

Establishing FCC Form 470

Service Provider

Contract Dates

Pricing Confidentiality

Confirmation

Here you will enter preliminary information about this contract, as well as your account number, if you know it.

Contract Information

Enter a nickname to easily identify this contract ⓘ*

WAN Contract 1819-2122

Contract Number ⓘ

7045551212

Provide a Nickname for the contract that will serve as a reminder. Type the Contract number, can use billing acct. number if you don't have one.

CANCEL

SAVE & CLOSE

SAVE & CONTINUE



Always Upload a Copy of your Contracts!

E-RATE

Create Contract

School District 10803 (BEN: 10029) - Letter of Intent Cat 2 - Contract ID #4812

Last Saved: 1/12/2018 9:01 AM EST

- Contract Information
- Establishing FCC Form 470
- Service Provider
- Contract Dates
- Pricing Confidentiality
- Confirmation

Here you will have the option to upload contract documents, including a description of each document.

Contract Information

Contract ID #4812

← A number is assigned by the system

Would you like to upload a copy of your contract?

YES NO

← Click Yes to upload

BACK CANCEL

SAVE & CLOSE SAVE & CONTINUE

Find and upload your contract from your local computer or shared drive

Create Contract

School District 10803 (BEN: 10029) - Letter of Intent Cat 2 - Contract ID #4812

Last Saved: 1/12/2018 9:01 AM EST

Contract Information

Establishing FCC Form 470

Service Provider

Contract Dates

Pricing Confidentiality

Confirmation

Here you will have the option to upload contract documents, including a description of each document.

Contract Information

Contract ID #4812

Would you like to upload a copy of your contract?

YES ✓

NO

Contract Document Upload

Please upload and describe each document related to your contract.

UPLOAD

Drop file here

Describe this contract document.

BACK

CANCEL

SAVE & CLOSE

SAVE & CONTINUE

Chose "UPLOAD" button to locate your contract. Give the system a moment to upload once you pick the file. Or DRAG and DROP the file.



Upload Contract continued....

Last Saved: 1/12/2018 11:24 AM EST

- Contract Information
- Establishing FCC Form 470
- Service Provider
- Contract Dates
- Pricing Confidentiality
- Confirmation

Here you will have the option to upload contract documents, including a description of each document.

Contract Information

Contract ID #4813

Would you like to upload a copy of your contract?

YES NO

Contract Document Upload

Please upload and describe each document related to your contract.

 Sample WAN contract
PDF - 86.45 KB

UPLOAD  Drop file here

Describe this contract document.

WAN Contract for ABC school district for 2018-19 through 2021-22 for 10 entities.

Describe this contract document.

Repeat the process for any additional documents associated with this contract, or any other contracts.

Be sure to add a description

Click on the "Save & Continue" button to proceed

Create Contract

School District 10803 (BEN: 10029) - WAN Contract 1819-2122 - Contract ID #4813

Last Saved: 1/12/2018 11:24 AM EST

Contract Information

Establishing FCC Form 470

Service Provider


Contract Dates

Pricing Confidentiality


Confirmation

Here you will answer additional questions about this contract.

Contract Information

Is this contract based on a State Master Contract? 

YES NO

Is this contract based on a multiple award schedule? 

YES NO

No to both questions for your personal contracts. (typically)

Click SAVE & CONTINUE

BACK CANCEL

SAVE & CLOSE SAVE & CONTINUE



Most contracts do NOT allow piggyback options

Create Contract

School District 10803 (BEN: 10029) - WAN Contract 1819-2122 - Contract ID #4813

Last Saved: 1/12/2018 11:30 AM EST

- Contract Information
- Establishing FCC Form 470
- Service Provider
- Contract Dates
- Pricing Confidentiality
- Confirmation

Here you will answer additional questions about this contract.

Contract Information

Can other applicants piggy back off this contract? ?

YES NO ✓

No to both of these (unless your contracts were written specifically to allow others to use your contracts.)

Save and continue.

Was this contract originally created by another applicant, and you then piggy backed off their contract? ?

YES NO ✓

Establishing Form 470

Establishing Form 470

E-RATE

Establishing FCC Form 470

Was an FCC Form 470 posted for the product and/or services you are requesting?

YES ✓ NO

Was your FCC Form 470 posted prior to Funding Year 2016?

YES NO ✓

Use the search tool below to find the establishing FCC Form 470.

Remember that the services in the contract had to be posted on the FCC Form 470.

Search FCC Forms 470

Search by FCC Form 470 Number

Search by BEN

Find your 470#

How many bids were received? ⓘ*

Enter the number of bids that you received for this product or service.

Enter the # bids received

Remember you cannot file your Form 471 before the Allowable Contract Date.

Search by Nickname (Partial or Full)



Choose 470; Save & Continue

F-RATE

Search FCC Forms 470

Search by FCC Form 470 Number

Search by Nickname (Partial or Full)

Search by BEN

[CLEAR FILTERS](#) [SEARCH](#)

<input type="checkbox"/>	FCC Form 470 Number	Nickname	Funding Year	BEN	BEN Name	Allowable Contract Date	Service Type
<input type="checkbox"/>	170002416	27-Feb-2017 021645	2017	10029	School District 10803	3/27/2017	Internal Connections; Internet Access and/or Telecommunications
<input type="checkbox"/>	180000068	BCS FY2018 C1 Wan	2018	10029	School District 10803	8/15/2017	Internal Connections
<input checked="" type="checkbox"/>	180000105	Beach County Schools WAN 18-19	2018	10029	School District 10803	10/18/2017	Internet Access and/or Telecommunications

[BACK](#) [CANCEL](#)

[SAVE & CLOSE](#) [SAVE & CONTINUE](#)

Check the correct 470, Save & Continue

Service Provider

Choose Service Provider – Use SPIN Search

Create Contract

School District 10803 (BEN: 10029) - Letter of Intent Cat 2 - Contract ID #4812

Last Saved: 1/12/2018 9:27 AM EST

Contract Information

Establishing FCC Form 470

Service Provider

Contract Dates

Pricing Confidentiality

Confirmation

Here you will associate the service provider listed on the contract.

Service Provider

Account Number (e.g., billed telephone number)

123456

If your service provider has given you one or more Account Numbers, please enter them.

Please select the service provider for this contract using the search below.

Search Service Providers

Search by SPIN

14304796

Search by Name (Full or Partial)

CLEAR FILTERS

SEARCH

BACK

CANCEL

SAVE & CLOSE

SAVE & CONTINUE

Enter the account number if you have one or leave blank.

Enter the SPIN, click Search. When the results are in, click the checkbox in front of the SPIN number and Save & Continue.



Contract Dates



Multi-Year Contract and Contract Award Date - CAD

Records / Applicant Entities

#10029 - School District 10803



Summary Customer Service Modifications Additional Information Discount Rate Contracts FCC Forms FRN Appeals News **Related Actions**

Create Contract

School District 10803 (BEN: 10029) - Letter of Intent Cat 2 - Contract ID #4812

Last Saved: 1/12/2018 9:36 AM EST

Contract Information Establishing FCC Form 470 Service Provider **Contract Dates** Pricing Confidentiality Confirmation

Here you will answer additional questions about the dates on your contract.

Contract Dates

Is this a multi-year contract?

YES ✓ NO

Choose YES if Multi-year contract

What is the date you awarded your contract? *

Date will be entered in each FRN where you cite this contract.

Words of Caution: Your Contract Award Date is usually the date the BOE approved the contract and the Superintendent or Board Chair signs and dates. This MUST be After the Allowable Contract Date, and Before filing and certifying the Form 471.

Complete this page ONLY if multi-year contract

E-RATE

Create Contract

School District 10803 (BEN: 10029) - WAN Contract 1819-2122 - Contract ID #4813

Last Saved: 1/12/2018 11:44 AM EST

- Contract Information
- Establishing FCC Form 470
- Service Provider
- Contract Dates**
- Pricing Confidentiality
- Confirmation

Here you will answer additional questions about voluntary extensions on your contract

Contract Dates

Does this contract include voluntary extensions?

YES ✓ NO

Complete according to your contract!



What is the contract expiration date if all extensions are exercised? *

How many extensions are left on the contract? *

Enter the number of voluntary extensions that you could still exercise on this contract.

What is the total remaining length of the contract if you exercised all extensions (in months)? *

Enter the number of months that would remain in the contract if you exercised all voluntary extensions.

Pricing Confidentiality

Pricing Confidentiality

E-RATE

Create Contract

School District 10803 (BEN: 10029) - Letter of Intent Cat 2 - Contract ID #4812

Last Saved: 1/12/2018 9:51 AM EST

Contract Information

Establishing FCC Form 470

Service Provider

Contract Dates

Pricing Confidentiality

Confirmation

Here you will answer additional questions about applicable publication restrictions on this contract.

Pricing Confidentiality

Is there a statute, rule, or other restriction which prohibits publication of the specific pricing information for this contract?

YES

NO ✓

BACK

CANCEL

SAVE & CLOSE

SAVE & CONTINUE

Words of Caution: There must be an actual statute in place. It is not sufficient for the vendor to simply state that their pricing is confidential. When in doubt, click on "No"!



Confirmation



Confirmation

E-RATE

Contract Information

Nickname WAN Contract 1819-2122

Can Other Applicants Piggy Back Off This Contract? No

Piggy Backed Off Another Contract? No

Contract ID 4813

Contract Number 7045551212

Based on a State Master Contract? No

Based on a Multiple Award Schedule? No

Establishing FCC Form 470

Establishing FCC Form 470 #180000105

Number of Bids Received 3

Service Provider

Service Provider USAC Service Provider Organization 1 (SPIN: 14010001)

Account Number 7045551515

Contract Dates

Award Date 1/5/2018

Includes Voluntary Extensions? Yes

Multi-Year Contract? Yes

Extension Details:

- There are 3 remaining voluntary extensions.
- There are 60 months remaining in this contract if all extensions are approved.

The contract info that has been entered will display



Save & Close or Complete.

E-RATE

If you choose Complete, you can never Edit or Delete this Contract Record.

A To save this contract as a draft so you can continue to edit it, click on the “Save & Close” button

B To submit the completed contract, click on the “Complete” button

Service Provider: Core Service Provider Organization (qtrm: 1447007)

Account Number: 14500010

Contract Dates

Award Date: 1/5/2018

Multi-Year Contract? Yes

Includes Voluntary Extensions? Yes

Extension Details:

- There are 3 remaining voluntary extensions.
- There are 60 months remaining in this contract if all extensions are exercised.
- This contract expires on 6/30/2022 if all extensions are exercised.

Pricing Confidentiality

There is no rule, statute, or other restriction which prohibits publication of the specific pricing information for this contract.

Supporting Documents

Document	Description
Sample WAN contract	WAN Contract for ABC school district for 2018-19 through 2021-22 for 10 entities.

BACK CANCEL

SAVE & CLOSE COMPLETE



Submitted Contracts - List

E-RATE

Records / Applicant Entities

#10029 - School District 10803

 MANAGE CONTRACTS

[Summary](#) [Customer Service](#) [Modifications](#) [Additional Information](#) [Discount Rate](#) **[Contracts](#)** [FCC Forms](#) [FRN Appeals](#) [News](#) [Related Actions](#)

Submitted Contracts

Contract ID	Contract Number	Contract Nickname	Award Date	
4812	NC10WIFI10	Letter of Intent Cat 2	1/5/2018	View
.....

Submitted contracts appear in the Contracts Module list and can be referenced when filing a Form 471



Editing Contracts

*You can edit any
contract that is still in
draft form.*

Return to Contract Module

E-RATE

On your organization's Landing Page, click on the link for the school district or independent school if it is a school not associated with a school district

My Landing Page



Welcome, School District 10803!

Notifications

Notification Type

Funding Year

Status All
 Generated
 Not Generated

Notification	Description	Issued Date	Generated By	Generated On
No items available				


My Entities

Entity	Entity Number	City	State	Zip Code
School District 10803	10029	Rockville	MD	20850
School 1 In District 10803	6309	Rockville	MD	20850
School 2 In District 10803	6310	Rockville	MD	20850
School 3 In District 10803	6311	Rockville	MD	20850

[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#) | [Appeal](#) | [FCC Form 500](#) | [SPIN Change](#) | [Service Substitution](#) | [Hurricane Impact Designation](#) | [Manage Users](#) | [Manage Organizations](#) | [USAC Website](#) | [Contact Us](#) | [Help](#)

Records / Applicant Entities

#10029 - School District 10803

 [CREATE A NEW USER](#) [ADD OR REMOVE EXISTING USERS](#) [MANAGE USER PERMISSIONS](#) [...](#)

[Summary](#) [Customer Service](#) [Modifications](#) [Additional Information](#) [Discount Rate](#) [Contracts](#) [FCC Forms](#) [FRN Appeals](#) [News](#) [Related Actions](#)

Organization Details

Name School District 10803

Entity Number 10029

FCC Registration Number 0123456789

Contact Information

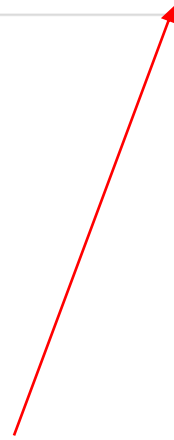
Physical Address 1 Main Street
Rockville, MD 20850

Applicant Type School District

Status Active

Phone Number 012-345-6789

Email school_dist_10803@mailinator.com



Click on the “Contracts” link in the menu of items on the top of the organization’s page

Submitted Contracts - List

E-RATE

Click on the “Manage Contracts” button



Records / Applicant Entities

#10029 - School District 10803



Summary Customer Service Modifications Additional Information Discount Rate **Contracts** FCC Forms FRN Appeals News Related Actions

Submitted Contracts

Contract ID	Contract Number	Contract Nickname	Award Date	
4812	NC10WIFI10	Letter of Intent Cat 2	1/5/2018	View
4670	708666288	C1 WAN 18-19 Windstream	9/14/2017	View

NOTE: Only submitted contracts appear on this page



Any contracts you have begun creating but not yet submitted and are still in draft form will appear by default in the list

Manage Contracts

Contracts - School District 10803 (BEN: 10029)

Use the dropdown to select the type of contract you would like to edit or remove. Click the Add a New Contract button at any time to create a new contract for your organization.

Contract Type

My Contract Drafts

The grid below contains all of your draft contracts created for this organization.

- To edit a draft contract, select 1 contract from the grid and click the Edit button at the bottom of the form.
- To delete a draft contract, select up to 5 contracts from the grid and click the Delete button at the bottom of the form.

<input checked="" type="checkbox"/>	Contract ID	Contract Number	Contract Nickname	Created	Last Modified
<input checked="" type="checkbox"/>	4813	7045551212	WAN Contract 1819-2122	1/12/2018 11:22 AM EST	1/12/2018 11:48 AM EST

CLOSE

ADD A NEW CONTRACT

EDIT

DELETE

Select the check box for the contract you wish to edit



Continue working on the contract creation process or edit the information as necessary

Create Contract

School District 6 (BEN: 116) - FY2016 Phone Contract - Contract ID #3

Last Saved: 2/3/2016 10:19 AM EST

Contract Information

Establishing FCC
Form 470

Service Provider

Contract Dates

Pricing Confidentiality

Confirmation

Here you will enter preliminary information about this contract, as well as your account number, if you know it.

Contract Information

Enter a nickname to easily identify this contract  *

Contract Number 

Cancel

Save & Close

Save & Continue



To view submitted contracts on this page, change the “Contact Type” drop down menu to “Submitted Contracts”

Manage Contracts

Contracts - School District 10803 (BEN: 10029)

Use the dropdown to select the type of contract you would like to edit or remove. Click the Add a New Contract button at any time to create a new contract for your organization.

Contract Type

Submitted Contracts

The grid below contains all submitted contracts for this organization.

<input type="checkbox"/>	Contract ID	Contract Number	Contract Nickname	Award Date
<input type="checkbox"/>	4812	NC10WIFI10	Letter of Intent Cat 2	1/5/2018
<input type="checkbox"/>	4670	708666288	C1 WAN 18-19 Windstream	9/14/2017

CLOSE

ADD A NEW CONTRACT

EDIT

DELETE

You can't EDIT a submitted contract! Nor DELETE one.



Contract Reminders

E-RATE

- 1. You only delete or edit contracts in DRAFT mode.*
- 2. You cannot recover a DRAFT contract that has been deleted.*
- 3. You can never Edit or Delete a Completed Contract*

