

Creating a Contract for Category 1

E-rate 2022 Handbook
Aug. 26, 2021



North Carolina Department of

PUBLIC INSTRUCTION

Step-by-Step for Uploading to the EPC Portal

E-Rate Creating a Contract

*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?

- 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.

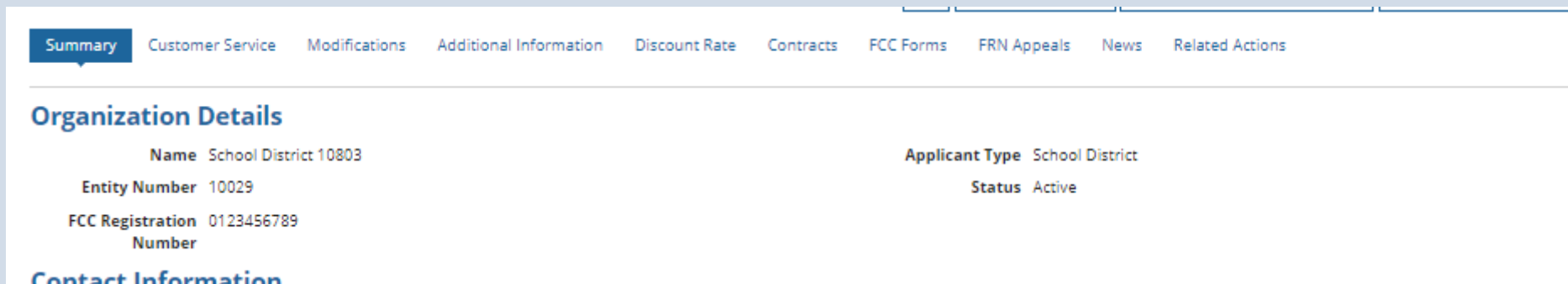
No: The contracts module is not required for that FRN

Do I have to use the contracts module?

- You can enter your Letter of Intent in the contracts module during the creation of your FRN, but it is much easier to enter the information in the module first, so you do not have to leave the Form 471 mid-process.

Where is the contracts module?

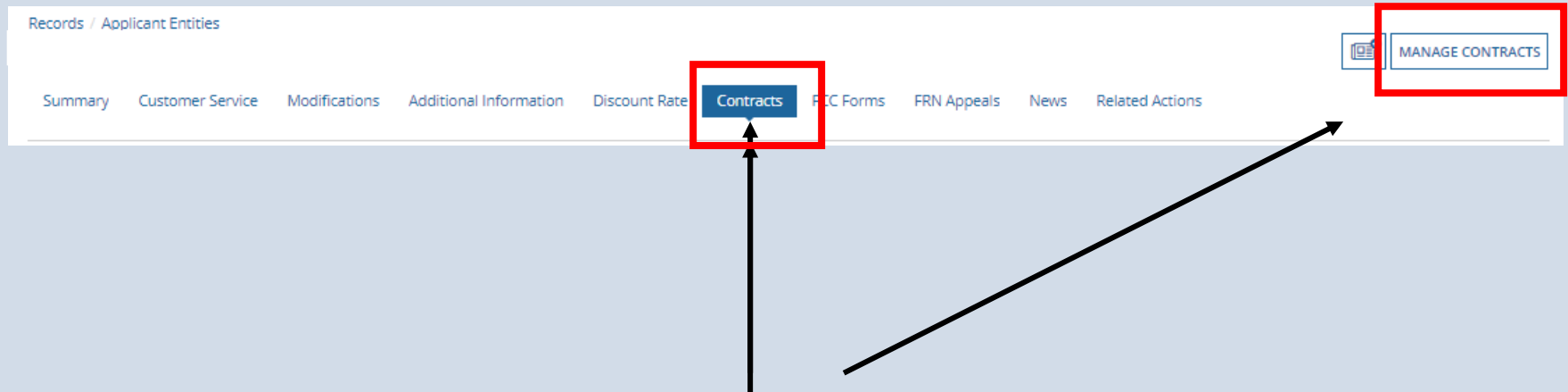
- The Contracts Module is a section within your organization's EPC profile.



The screenshot shows a web interface for an EPC profile. At the top, there is a horizontal navigation bar with several tabs: Summary (highlighted in dark blue), Customer Service, Modifications, Additional Information, Discount Rate, Contracts, FCC Forms, FRN Appeals, News, and Related Actions. Below the navigation bar, the main content area is titled "Organization Details". Under this heading, there are two columns of information. The left column contains: Name School District 10803, Entity Number 10029, and FCC Registration Number 0123456789. The right column contains: Applicant Type School District and Status Active. Below the organization details, the heading "Contact Information" is partially visible.

The Contracts Module

The Contracts Module



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

The Contracts Module

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

Contract Information

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

Upload Letter of Intent as Contract

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? ⓘ

← Click Yes to upload

Upload Letter of Intent as Contract

Create Contract

School District - 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

Upload Letter of Intent as Contract

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

Be sure to add a description

Describe this contract document.

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

Describe this contract document.

BACK

CANCEL

SAVE & CLOSE

SAVE & CONTINUE

Click on the "Save & Continue" button to proceed

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

Upload Letter of Intent as Contract

Create Contract

School District

- 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 ✓

BACK

CANCEL

SAVE & CLOSE

SAVE & CONTINUE

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

Click SAVE & CONTINUE

Upload Letter of Intent as Contract

Create Contract

School District

- 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 ✓

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

YES

NO ✓

BACK

CANCEL

SAVE & CLOSE

SAVE & CONTINUE

No to both of these unless your contracts were written differently than most.

Save and continue.

Establishing Form 470

Establishing Form 470

Establishing FCC Form 470

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

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

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.

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

Search by Nickname (Partial or Full)

Enter the # of bids received

Find your 470#

Establishing Form 470

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"/>	180000000	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

Service Provider

Create Contract

School District

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 make up one, use your phone number.

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

Contract Dates

Contract Dates

Records / Applicant Entities

#10029 - School District

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

Create Contract

School District

- 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

What is the date you awarded your contract? *

mm/dd/yyyy

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

BACK

CANCEL

SAVE & CLOSE

SAVE & CONTINUE

Words of Caution: Your Contract Award Date is usually the date the BOE approved the contract. – which is certainly After the Allowable Contract Date, and Before filing and certifying the Form 471.

Contract Dates

Create Contract

School District

) - 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?

Complete
according to
your
contract!

YES ✓

NO

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.

BACK

CANCEL

SAVE & CLOSE

SAVE & CONTINUE

Pricing Confidentiality

Pricing Confidentiality

Create Contract

School District

- 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 ✓

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

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 exercised.

The contract info that has been entered will display

Confirmation

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: State Service Provider Organization (SPIN# 1401000) Account Number: 1403331012

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

Confirmation

Records / Applicant Entities

#10029 - School District



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.*

Editing Contracts

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

 Training
Universal Service Administrative Co.

Welcome, School District 10803!

Notifications

Notification Type *Please select a value*

Funding Year *-- Select a 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](#)

Editing Contracts

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

Applicant Type School District

Status Active

Contact Information

Physical Address 1 Main Street
Rockville, MD 20850

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

Editing Contracts

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

MANAGE CONTRACTS

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

Editing Contracts

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

Editing Contracts

To view submitted contracts on this page, change the “Contract 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 cannot EDIT a submitted contract! Nor DELETE one.

Editing Contracts

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

Editing Contracts

Removing Contracts

You only delete or edit contracts in DRAFT mode.

You cannot recover a contract that has been deleted.