



E-Rate Beginner Training

November 2020

Todd Lawrence

State E-Rate Coordinator



Supporting Schools and Students to Achieve

SHERRI YBARRA, ED.S., SUPERINTENDENT OF PUBLIC INSTRUCTION

Agenda



- Program Overview – What is E-Rate?
- Eligibility
- What does E-Rate pay for?
- How much \$\$\$ do you get?
- Terminology
- How to apply?

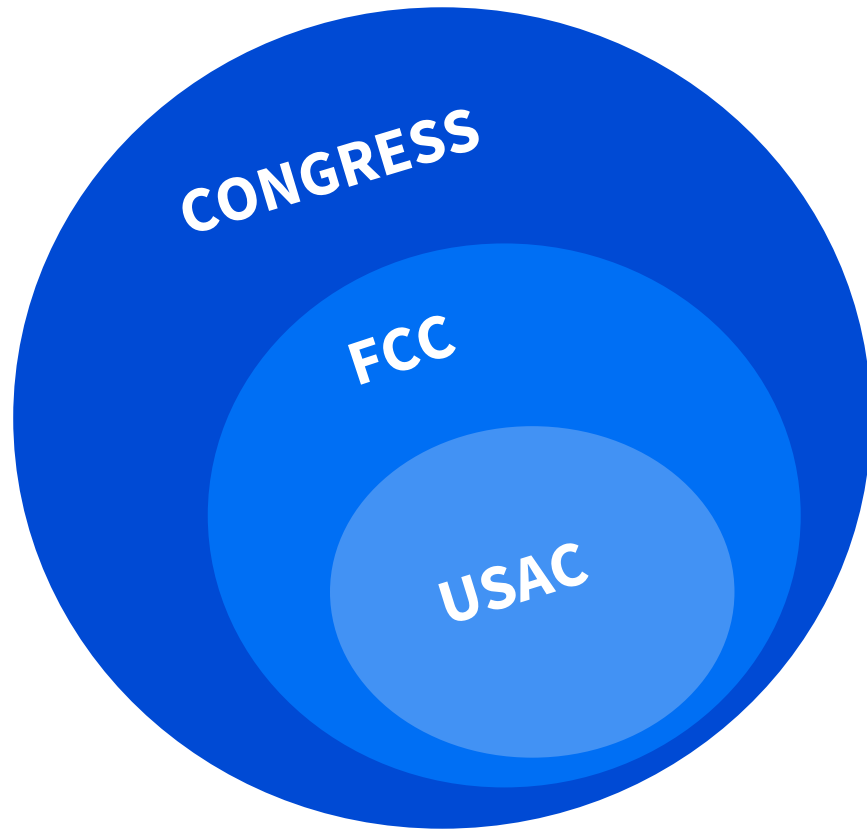
Schools & Libraries (E-Rate) Program



Mission

Help ensure that schools and libraries can obtain high-speed internet access and telecommunications at affordable rates, and keep students and library patrons connected to broadband by providing a discount on eligible services.

Overview – Who Makes The Rules



- Congress wrote the Telecommunications Act of 1996, which directed the Federal Communications Commission (FCC) to establish the E-rate Program and other programs.
- The FCC issues orders that set rules and policies for the program and gives direction to the Universal Service Administrative Company (USAC) through orders.
- USAC is responsible for the day-to-day administration of the E-rate Program.

How Does The USF Bucket Get Filled?



Consumers pay a fee to providers
....and the bucket fills

| | |
|--|----------------|
| Federal Excise Tax | \$0.72 |
| Federal Universal Service Fund Surcharge | \$2.50 |
| Network Access Fee | \$3.69 |
| Regulatory Cost Charge | \$0.42 |
| Subscriber Line Charge | \$6.50 |
| Universal Access Surcharge | \$0.09 |
| | \$44.94 |
| Alaska Universal Service Fund Surcharge | -\$0.38 |
| Federal Excise Tax | -\$0.04 |
| Federal Universal Service Fund Surcharge | -\$0.18 |
| Regulatory Cost Charge | -\$0.05 |
| | -\$0.65 |

How Does The USF Bucket Get Filled?



The four Universal Service Programs who draw from this USF “bucket” are:

- Schools and Libraries (E-Rate)
- Rural Health Organizations
- Low Income Americans
- High Cost for Eligible Service Providers

How Does The USF Bucket Get Filled?



Schools and Libraries, considered to be **educational** organizations, are referred to as E-rate.

E-rate is capped at \$4.15Billion/yr. with the cap being indexed to inflation.

E-Rate Eligibility Requirements



To get E-rate Discounts you must be able to satisfy all 4 of these criteria:

- **Eligible Entities:** Schools (public and Private) K-12 and Public Libraries
- **Eligible Purpose:** Education of eligible students (schools) and public (libraries)
- **Eligible Service:** Eligible Services List defines what is eligible
- **Eligible Location:** On the school or library campus only

Eligibility – Schools



- Must provide elementary and/or secondary education, as determined under state law.
- Cannot have an endowment exceeding \$50 million.
- Cannot operate as a for-profit business.



Eligibility – Libraries



- Must be eligible for assistance from their state library agency under LSTA*.
- Budget must be separate from any schools.
- Cannot operate as a for-profit business.

* LSTA = Library Services and Technology Act

Eligibility – Non Instructional Facility (NIF)



- Non-instructional facilities (NIFs) are eligible for discounts on some services. NIFs are:
 - School buildings that don't have classrooms.
 - Library buildings that don't have public areas.



What Does E-Rate Pay For?



Each year the FCC approves a list of eligible services.

This list is commonly referred to as the Eligible Service List (ESL). It is soon to be released for the upcoming Funding Year 2021. The timing of the release of the ESL typically sets the timing for the upcoming funding window.



What Does E-Rate Pay For?



Category 1

Broadband services from the service provider to the schools and/or libraries.

Category 2

Network equipment and services for the **management** and **maintenance** of that equipment used for broadband connectivity within schools and libraries.

Category 1 Examples



- Broadband over Power Lines
- Cable Modem
- DS-1, DS-2, DS-3, DS-4
- Ethernet
- Leased Dark Fiber (including dark fiber indefeasible rights of use (IRUs) for a set term)
- Self-Provisioned Network
- Satellite Service
- Microwave
- Multi-Protocol Label Switching (MPLS)

Category 2 Examples



- Network Cabling
- Wireless Access Point
- Switch
- Router
- Repair and upkeep of eligible hardware
- Wire and cable maintenance
- Basic technical support

How Much Do I Get???



School discounts depend on two factors:

- The level of poverty (the percentage of NSLP* eligibility) in the school district.
- The urban or rural status of the school district or library system.

*NSLP = National School Lunch Program

How Much Do I Get???



Library NSLP Calculation

- Determine the main branch of the library.
- Determine the school district in which the main branch of the library is located.
- Use the NSLP percentage calculation for that school district.

Discount Matrix



| INCOME Measured by percentage of students eligible for NSLP | DISCOUNT | |
|--|----------------------|----------------------|
| | URBAN | RURAL |
| Less than 1% | 20 | 25 |
| 1% to 19% | 40 | 50 |
| 20% to 34% | 50 | 60 |
| 35% to 49% | 60 | 70 |
| 50% to 74% | 80 | 80 |
| 75% to 100% | 90 for C1, 85 for C2 | 90 for C1, 85 for C2 |



E-Rate Terminology

Making Sense of the E-Rate World



Funding Year vs. Fiscal Year



- A Funding Year (FY) and Fiscal Year (FY) both run July 1 to June 30.
 - Funding Year, FY2020 starts on July 1, 2020, and ends on June 30, 2021.
 - Fiscal Year, FY2020 starts on July 1, 2019, and ends on June 30, 2020.

Terminology – Forms



470

471

486

472

474



**Competitive
Bidding**

**Apply for
Discounts**

**Start
Services**

Terminology – Forms



470

- Begin Competitive Bidding Process

471

- Description of Services Order and Certification

486

- Set Service Start Date and CIPA Compliance

472

- BEAR – Billed Entity Application Reimbursement

474

- SPI – Service Provider Invoice

498

- Banking Form – “Set it and forget it”

Terminology – Filing Window



- All FCC Form 471's are filed during the FCC Form 471 application filing window.
 - The 471 filing window generally opens in mid-January and closes in mid-March in advance of the start of the funding year.
- Applications (FCC Forms 471) filed outside of the filing window are not considered for funding.

Terminology – Identifying Numbers



- Each applicant is assigned an entity number in the system.
- Each entity that receives and pays bills is assigned a **Billed Entity Number (BEN)**.
 - As for a school district, the district will have the BEN and each school will have a Building Entity Number that falls under the BEN.
 - Library Systems are structured the same way.

Terminology – Identifying Numbers



Examples of applicant entities with entity numbers:

- Individual school
- School district
- Individual library branch
- Library system
- Bookmobile
- Consortium
- Educational service agency



A Service Provider Identification Number (SPIN) is assigned to providers participating in E-rate.

- Service providers may have more than one SPIN due to:
 - Different business units or service areas.
 - Mergers and acquisitions.

Terminology – Funding Request Number



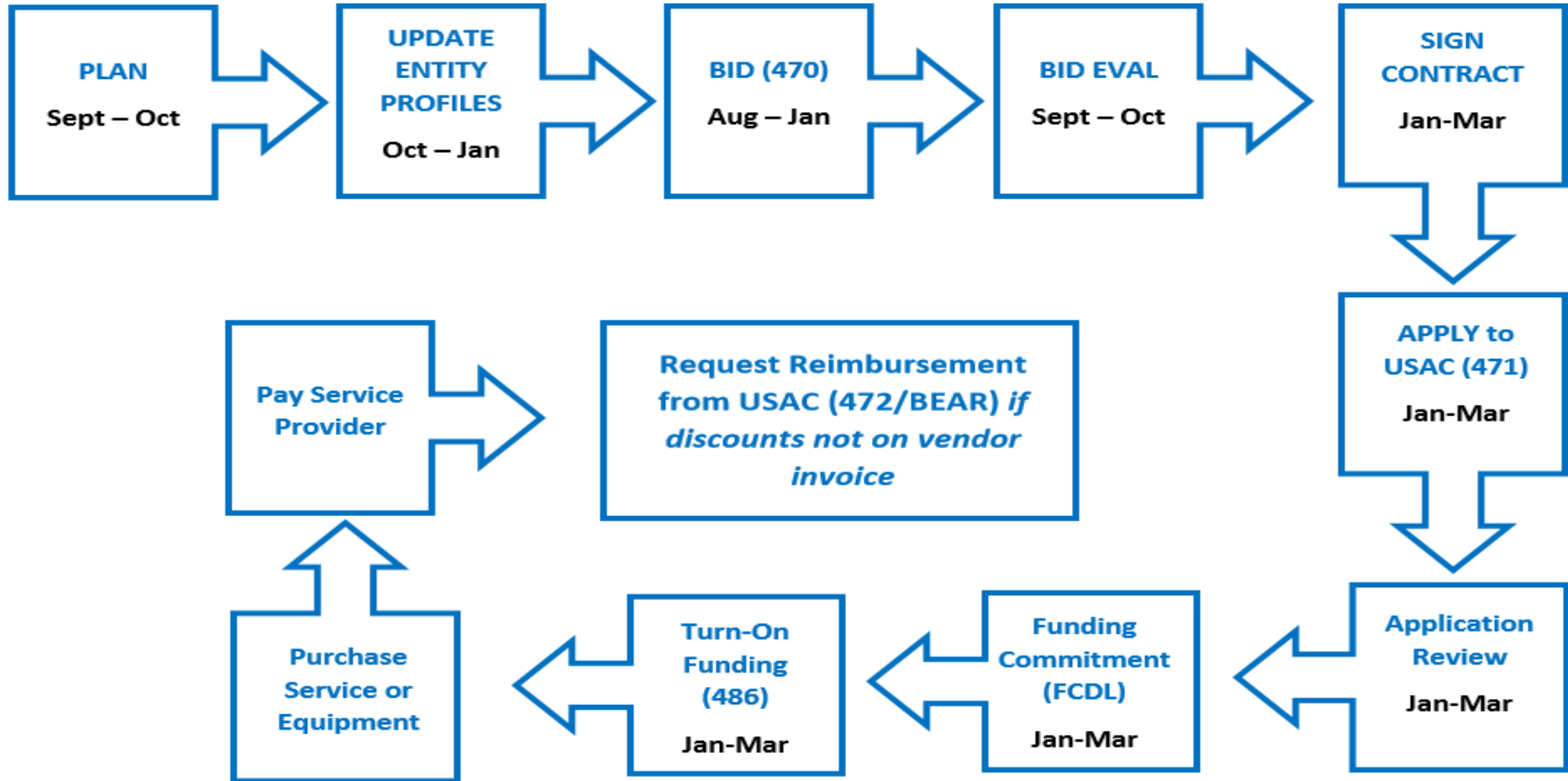
Applying for discounts

- Each service request is identified with a Funding Request Number (FRN).
- Each service request is listed on the Form 471.
- An applicant can have one or many FRNs on the 471.

FRNs are specific to:

- A category of service
- Service type
- Service provider (SPIN)
- Contract

E-Rate Flow Chart



How to Apply? E-Rate Productivity Center



[Subscribe](#) [Payments](#) [Open Data](#)

[Sign In](#)



[About](#)

[E-rate](#)

[Rural Health Care](#)

[Lifeline](#)

[High Cost](#)

[Service Providers](#)

E-rate

Ensuring that schools and libraries across the U.S. are connected to information and resources through the internet



Manage Your Account

Access your E-rate Productivity Center (EPC) account, submit forms, and file your invoices by logging into One Portal.

[Sign In](#)

Resources

[Eligible Services List](#)

[Tools](#)

[Weekly SL News Brief](#)

[Training](#)

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Upcoming Dates

Second FY2020 Application Filing Window

Window closes on
October 16, 2020
at 11:59:59 PM EDT

4

Days

11

Hours

27

Minutes

How to Apply? E-Rate Productivity Center



What is EPC?

- Account and application management portal
- Manage program processes, receive notifications, and contact customer service.

How to Apply? E-Rate Productivity Center



What can you do in EPC?

- File most program forms
- Maintain a list of your related entities
- Update entity information
- **Account Administrators** can add users on their organization's account and assign them rights (permissions) to file program forms.

How to Apply? E-Rate Productivity Center



News Tasks Records **Reports** Actions Appian

My Applicant Landing Page

Training
Universal Service Administrative Co.

Welcome, School District 26!

Pending Inquiries

Type: Application/Request:

Funding Year:

Pending COMAD Inquiries are not included.

| Application/Request Number | Type | Nickname | Inquiry Name | Outreach Type | Date Sent | Due Date | Extn. | Status |
|----------------------------|------|----------|--------------|---------------|-----------|----------|-------|--------|
| No items available | | | | | | | | |

Notifications

Notification Type: Status: All Generated Not Generated

Funding Year:

| Notification | Description | Issued Date | Generated By | Generated On |
|--------------------|-------------|-------------|--------------|--------------|
| No items available | | | | |

My Entities

| Entity | Entity Number | City | State | Zip Code |
|-----------------------------|---------------|-------------|-------|----------|
| School District 26 | 10514 | Springfield | ID | 83277 |
| School District 26 NIF | 10515 | Springfield | ID | 83277 |
| School District 26 School A | 10516 | Springfield | ID | 83277 |
| School District 26 School B | 10517 | Springfield | ID | 83277 |

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

How to Apply? E-Rate Productivity Center



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How to Apply? E-Rate Productivity Center



Customer Service Cases

| Case ID | Topic | Nickname | Status | Date Created |
|--------------------|-------|----------|--------|--------------|
| No items available | | | | |

FCC Forms and Post-Commitment Requests

FCC Forms

Post-Commitment Requests

Form Type

Funding Year

Status All

Incomplete

Certified

| Nickname | Application Number | Funding Year | Status |
|--------------------|--------------------|--------------|--------|
| No items available | | | |

Where Can You Get Help???



- Know your State E-Rate Coordinator
- USAC has a Client Service Bureau to Answer Questions
 - Phone Number: 1-866-203-8100
- Get familiar with the USAC website
 - <https://www.usac.org/e-rate/>
- Sign up for USAC weekly News Briefs
- Sign up for E-Rate Idaho Blog
 - <http://toddlawrenceidaho.blogspot.com/>

FOLLOW BY EMAIL

Submit

State Broadband Reimbursement



State of Idaho contributions:

- SDE can reimburse schools and libraries who participate in E-Rate program
- Applicants receive the non-discounted portion of the E-Rate portion.
- Currently this is for Category 1 services
 - Internet Access and WAN connections
- Daniel Vogt: dvogt@sde.idaho.gov

Questions???



Session Evaluation



<https://bit.ly/2IRoqM4>

My Details



Todd Lawrence | State E-Rate Coordinator

Idaho State Department of Education

650 W State Street, Boise, ID 83702

208.332.6959

tlawrence@sde.idaho.gov

www.sde.idaho.gov/tech-services

<http://toddlawrenceidaho.blogspot.com/>

