

E-Rate Starter Kit for LEAs

2024-25 Guide to FCC E-Rate and Idaho Broadband Programs



HOW TO USE THIS GUIDE

This guide is designed to assist business managers, technology directors, and all other administrative staff responsible for completing annual E-Rate obligations on behalf of their schools.

It is built around the E-Rate Funding Year beginning July 1 and ending June 30. Included within the guide is a multi-year July through June calendar to help visualize the annual program timeline, and to visualize multi-year timelines for services/contract procurement. Below the calendar is a checklist of tasks that must be completed in Idaho before completing the next successive E-Rate task or FCC Form.

WHAT IS E-RATE?

E-Rate is an annual funding program for schools and libraries that subsidizes the costs of campus Internet Access and other related network costs. This program is overseen by the Federal Communications Commission (FCC) and managed by the Universal Service Administrative Company (USAC).

The FCC determines the requirements and the steps applicants must follow to receive E-Rate commitments from USAC.

IDAHO'S BROADBAND REIMBURSEMENT PROGRAM

Internet and WAN services can be eligible for additional reimbursements each year through Idaho's Broadband Reimbursement Program. To receive reimbursements, schools submit E-Rate eligible invoices to the State Board of Education, and Libraries submit their invoices to the Idaho Commission for Libraries.

Use the monthly invoice checklist in the "Applicants Guide to E-Rate Funding" to track invoices sent to your agency.

BROADBAND INFRASTRUCTURE IMPROVEMENT GRANT (B.I.I.G.)

Idaho offers a state match program that provides additional funding for one-time special construction costs related to installing fiber infrastructure. The grant is open to Idaho LEAs and libraries, and can significantly reduce the remaining amount of fiber installation costs. B.I.I.G. requires applicants to follow the E-Rate process, and that applicants collaborate with the Broadband Program on their RFP documents before posting them to an FCC Form 470 (end of Step 1).

DESIGNED FOR IDAHO SCHOOLS

This guide contains notes and instructions specific to Idaho LEAs, but can be used by non-Idaho entities to gain a general understanding of the E-Rate cycle.

All E-Rate applicants must adhere to their state's procurement laws and any other local regulations.

SUPPORT

State of Idaho support:
boardofed.idaho.gov

E-Rate Website:
usac.org/e-rate/

E-Rate Customer Service:
888-203-8100

LEA Entity BEN #:

Timeline

E-Rate & State Broadband



July August September October November December January February March April May June

PLANNING PHASE

SCHOOL YEAR _____

IMPORTANT

Funding requested in **Step 3** and announced/committed in **Step 4** only applies to the 12 months in **Step 5** and will need to be requested again for the following school year.

Step 1

DETERMINE NEEDS FOR JULY 1 OF FUNDING PHASE

PROCUREMENT PHASE

SCHOOL YEAR _____

Step 2

SET DUE DATES, PUBLISH RFP - FCC FORM 470

EPC ADMIN WINDOW: UPDATE LEA ENROLLMENT AND MORE!

Step 3

REQUEST FUNDING - FCC FORM 471

Step 4

FUNDING ANNOUNCED - FCC FORM 486

FUNDING CYCLE START

FUNDING PHASE

Initial school year of service: _____ / Initial funding year of service start date: 7/1/ _____

VERIFY CONTRACT RENEWAL/END TIME FOR A NEW CONTRACT?

Step 5

INVOICING (BEAR OR SPI)

FIRST STATE DISBURSEMENT

SECOND STATE DISBURSEMENT

CONTRACT START _____ CONTRACT END _____ REPEAT STEPS 3 - 6 FOR EACH YEAR CONTRACT IS ACTIVE

CLOSEOUT PHASE

Final school year of service: _____ / Final funding year of service end date: 6/30/ _____

Step 6

FUNDING YEAR INVOICES DUE: ACTUAL DUE DATES WILL VARY.

Document Retention

ALL RELEVANT DOCUMENTS MUST BE RETAINED FOR 10 YEARS FROM THE LAST DATE OF SERVICE.

FUNDING CYCLE END

New Contract Needed for School Year: _____ Pre-Procurement (Step 1) Date: _____

Project Nickname: _____

Type: _____

FRN: _____

Applicant's Guide to E-Rate Funding (Idaho)

Updated for School Year 2024-25

For up-to-date program requirements, visit usac.org and boardofed.idaho.gov



Step 1

☐ Collaborate with administration to determine the technology needs for...

School Year

Y1 _____ Y2 _____

July 1, Y1 to June 30, Y2
E-Rate Funding Year Y1
Idaho Fiscal Year Y2

☐ Calculate discount percentage for E-Rate Funding Year Y1 _____ %

Gather enrollment data from March of planning phase. Then, refer to the "E-Rate Discount Matrix" on USAC.org. If CEP, use multiplied data from base year of cycle.

☐ If no new contracts are needed, skip the remaining checks in Steps 1 and 2. Proceed to Step 3.

☐ If applying for B.I.L.G. (fiber grant): Contact OSBE Broadband Program to confirm intent broadband@edu.idaho.gov

☐ Review Idaho 67-2806, determine approximate value of contract.

SELECT ONE:

☐ Less than \$75,000
Recommended: RFP

☐ Between \$75,000 – \$150,000

Required: RFP, and three solicitations

Step 2

☐ Finalize RFP and procurement timeline with stakeholders

☐ Confirm which E-Rate Categories and Types your service is eligible for. Consult the **Eligible Services List**. Include several types as needed.

Certify Form 470/RFP

☐ Confirm with vendors the E-Rate eligible MRC and NRC (monthly recurring cost, non-recurring cost)

☐ Confirm recommended bandwidth for state reimbursement.

☐ Score bids and award contract.

Documents to retain should include...

☐ Scoring matrix, and documentation confirming how winner was selected.

If scoring dark fiber or self-provisioned fiber: must compare cost of dark/self provisioned against cost of fiber over span of at least 10 years.

☐ Communications with vendors

☐ Meeting minutes confirming award

☐ Sign final contract.

☐ Send copy to OSBE or ICIL.

Step 3

Accepted Jan. Y2 - Mar. Y2
Late forms require appeal to FCC.

☐ Create new Form 471 and Funding Request Numbers.

☐ IF CONTINUING SAME CONTRACT: Use last year's FRN(s) to "Copy FRN."

☐ IF NEW CONTRACT:

Upload contract(s) in entity profile

Tips:

- (1) Service Provider per FRN.
- (1) Category Type per FRN (e.g. Data Transmission, or Internal Connections).
- All Category 1 FRNs can be on same Form.
- All Category 2 FRNs can be on same Form.

☐ Review draft PDF with stakeholders.

Certify Form 471

Step 4

☐ Respond to PIA questions from application reviewers.

Respond in EPC to provide additional documents, validate discount percentage, and more. Corrections to applications can be made during this time.

☐ Receive Funding Commitment Decision Letter (FCDL)

Read the FCDL carefully and in full. If FCDL is not correct, submit a USAC appeal within 60 days.

☐ Confirm invoicing type with service provider.

SELECT ONE:

☐ Discount applied to invoice. Vendor will invoice USAC with SPI Form 474.

☐ Invoiced in full. Applicant will invoice USAC with BEAR Form 472.

☐ Confirm CIPA compliance.

Documents to retain include...

☐ Proof of content filter

☐ Internet Safety Policy

☐ Minutes of public meeting when policy was adopted

☐ Install eligible services and/or hardware.

Certify Form 486

Deadline to certify: 120 days after (whichever is later): funding letter or installation date.

☐ Confirm bandwidth reporting with OSBE or ask service provider to send reports to OSBE

Step 5

☐ Receive and process invoice(s) for services and/or hardware.

☐ Send invoices to OSBE or ICIL for state reimbursements.

Use the chart at the bottom to track which invoices have been sent this year.

☐ If "Discount applied to invoice," skip remaining tasks and proceed to Step 6.

☐ If "Invoiced in full," submit invoices to E-Rate via EPC.

- Click, "EPC E-Rate Invoicing"
- Select Funding Year Y1
- Create (1) line item per invoice.
- Multiple invoices and FRNs can be included on a single BEAR Form 472.

Certify Form 472

Deadline to certify is 120 days after last date of service (often 10/28/Y-2).

File monthly, or quarterly, etc

NOTE:

Reviewers may send questions about reimbursement request. If BEAR is denied, it can be resubmitted with corrections.

Step 6

☐ All relevant documents must be retained for 10 years (beginning from last date of service). USAC may conduct PQA or BCAP audits during that time.

Idaho 472	Idaho 472
<input type="checkbox"/> July Y1	<input type="checkbox"/> January Y2
<input type="checkbox"/> August Y1	<input type="checkbox"/> February Y2
<input type="checkbox"/> September Y1	<input type="checkbox"/> March Y2
<input type="checkbox"/> October Y1	<input type="checkbox"/> April Y2
<input type="checkbox"/> November Y1	<input type="checkbox"/> May Y2
<input type="checkbox"/> December Y1	<input type="checkbox"/> June Y2

E-Rate Glossary and Resources

Updated for School Year 2024-25



ACRONYMS

Acronym	Full Term
BCAP	Beneficiary and Contributor Audit Program
BEAR	Billed Entity Applicant Reimbursement
BEN	Billed Entity Number
B.I.I.G.	Broadband Infrastructure Improvement Grant
CIPA	Children's Internet Protection Act.
COMAD	Commitment Adjustment
EORC	Education Opportunity Resource Committee
EPC	E-Rate Productivity Center (login to usac.org)
FCDL	Funding Commitment Decision Letter
FRN	Funding Request Number
Gbps/Mbps	Gigabits per second / Megabits per second
ICfL	Idaho Commission for Libraries
IDD	Invoice Deadline Date
MRC	Monthly Recurring Costs
NRC	None Recurring or One Time Costs
OSBE	Idaho Office of the State Board of Education
PIA / PQA	Program Integrity/Quality Assurance
SSD	Service Start Date
SPI	Service Provider Invoicing
SPIN	Service Provider Identification Number

FCC FORMS & UPDATES

FCC Form	Description	Order in Process
470	Competitive bidding	Step 2
471	Funding Application	Step 3
472	Applicant reimbursement (BEAR)	Step 5, If applicable
473	Service Provider Certification	Not for applicants
474	Service Provider Invoicing (SPI)	Not for applicants
484	Cybersecurity Pilot Application	Separate program
486	Receipt of Service; CIPA Certification	Step 4
Form 498 / Form 498 ID	Sets banking/routing information for receiving USAC payments.	When setting up payment info / When filling out BEAR Form 472.
500	To change information on funded Form 471	As needed after receiving FCDL.
Appeal	File an appeal to dispute or correct a Funding Decision, or other official USAC communications.	Within 60 days of receiving a Funding Decision, Revised Funding Decision, or any other official USAC notification.
Eligible Services List	List of hardware and services eligible for E-Rate funding.	Published annually by FCC. Release date varies.
RAL	To change any information on pending FRN	Only when Form 471 is pending
SPIN Change	Change service provider on funded Form 471	Anytime
Service Substitution	Change description of service on funded Form 471	Anytime

IDAHO BANDWIDTH RECOMMENDATIONS

Schools are eligible for reimbursement up to the maximum recommended amount.

! If your bandwidth exceeds the recommended maximum, please contact us to confirm your reimbursement amount.

User Count	Recommended Minimum	Recommended Maximum
499 Users or below	100 Mbps	Up to 1 Gbps. If 1 Gbps, the total monthly cost must be equal to or less than \$2,000/mo, and \$2.00 per Mbps (Mbps ÷ MRC) to qualify for automatic reimbursement.
At least 500	1 Gbps	1 Gbps
At least 1,500	1 Gbps	2 Gbps
At least 3,000	1 Gbps	5 Gbps
At least 6,000	1 Gbps	Up to 10 Gbps, or 1Mbps/User
At least 15,000	1 Gbps	Up to 20 Gbps, or 1 Mbps/User
At least 35,000	1 Gbps	Up to 40 Gbps, or 1 Mbps/User