E-rate: Preparing to File Form 471

College and Career Ready

That's our goal.

The Department of Public Instruction is the state agency that advances public education and libraries in Wisconsin. Our goal is to ensure **every child** graduates ready for further education and the workplace.

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5:00

WISCONSIN DEPARTMENT OF
PUBLIC INSTRUCTION
Tony Evers, PhD, State Superintendent

Overview

- Previous Webinars: (www.dpi.wi.gov/erate)
  - Introduction to E-rate
  - Bidding Rules & Best Practices
  - Filing the Form 470 and Category 2 Overview

- Today's presentation will focus on Preparing to File the Form 471

- Let's start by reviewing information from the last webinar on Category 2 budgets

Category 2 Budgets

- Your district or library has a five-year C2 budget, to offset network costs

- The new five year budget cycle is: 2021-2025

- The budget amount is $167/student; $4.50/library square foot

- Beginning this school year (FY21) budgets are districtwide

Category 2 Budget: Example

- Ebenezer School District has 1,000 students

- Its Category 2 budget = 1,000 x $167 = **$167,000** for 5 years; **note that this is the pre-discount amount**

- Over this period, it can receive E-rate funding for purchases of up to $167,000 of eligible equipment and services

- The budget amount covers retail, or pre-discount costs

USAC Category 2 Budget Tracker

- USAC provides a [Budget Tracker](#) to show how much C2 budget your district or library has left

- Currently it shows your full 5-year budget

USAC Category 2 Budget Tracker

- It's a terrific tool, but not totally intuitive to use.

1. Look up your district:

USAC Category 2 Budget Tracker

2. Scroll down using outer scrollbar:

3. Click Apply!

Billed Entity Name   IS   ⌄

🔍 Search all values

SELECTED VALUES

▼ BUTTERNUT SCHOOL DISTRICT   ✕

LABEL A - Z

(No value)

100 ACADEMY OF EXCELLENCE

127722 - MIAMI-DADE COUNTY PUBLIC SCHOOLS

21ST CENTURY CYBER CHARTER SCHOOL

Apply

USAC Category 2 Budget Tracker
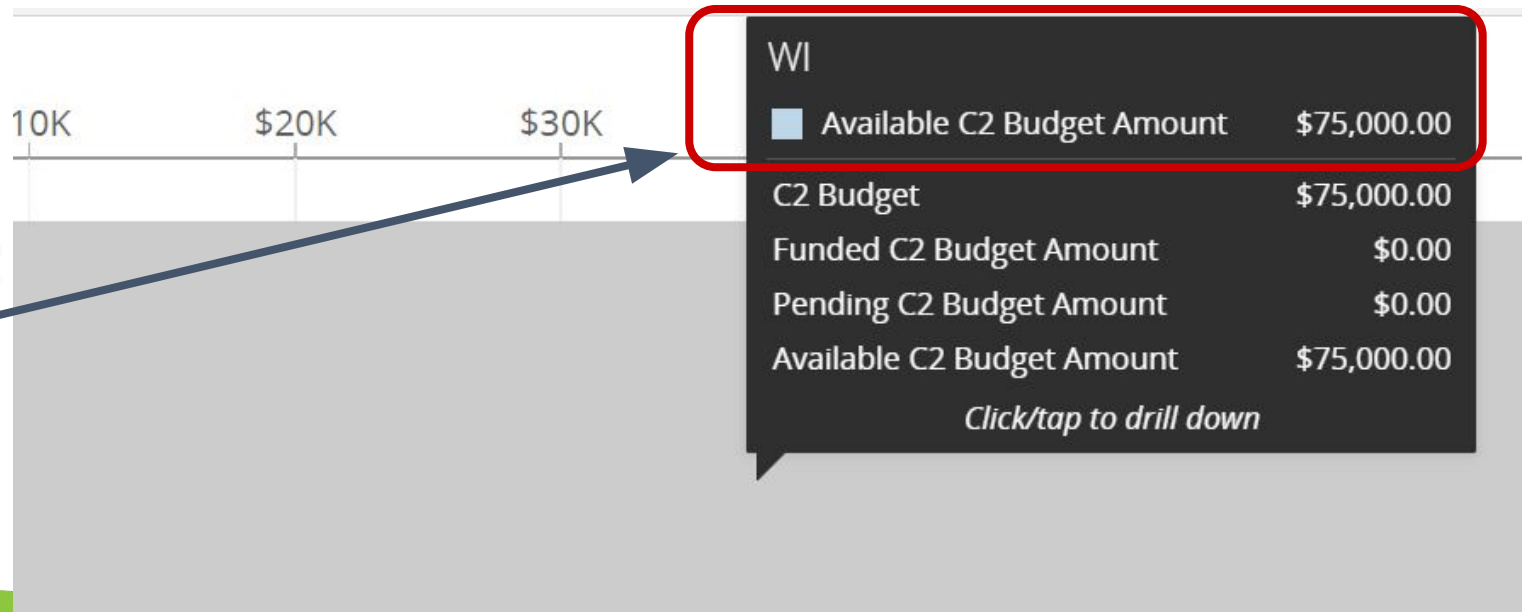
Updated Lunch Data

- Update your enrollment, F/R data or CEP in the EPC Portal

- **Use 2021 Lunch Data posted numbers** (2019/20 certified numbers at www.dpi.wi.gov/erate)

  - Districts have questions about USAC's statement in training about states being able to use last year's (pre-COVID) numbers

  - For FY 2021 DPI will send USAC the fall 2019 data, which are the pre-COVID numbers
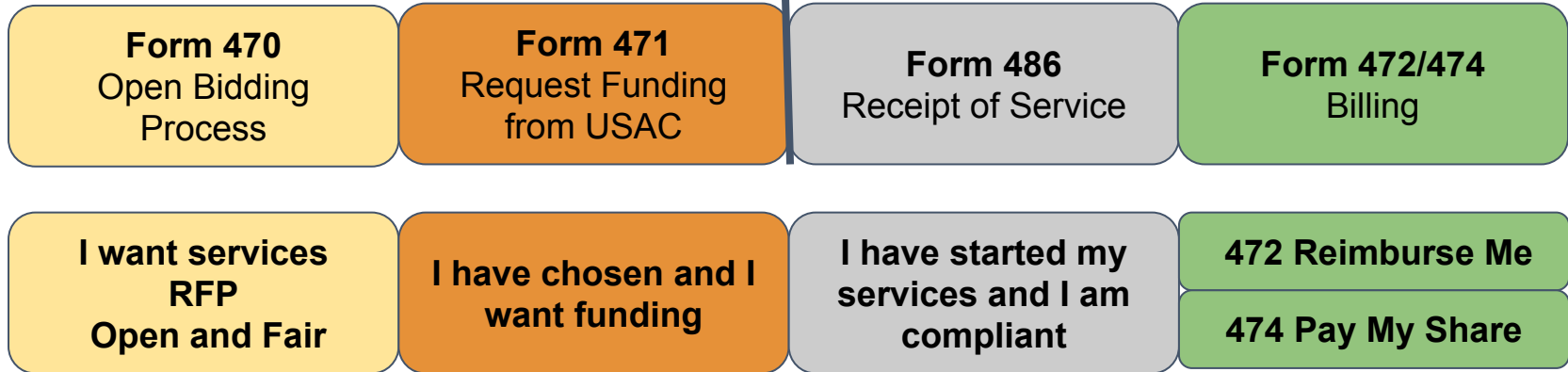
Frequently Asked C2 Questions

- Five-year budget is set with first E-rate purchase in the five-year cycle

    - Concerns about enrollment dropping in future years

    - Solution: To lock in higher C2 budget allocation, apply for minimal funding in FY 2021 for small item, like cables

- If enrollment goes up during the five-year budget cycle the district can get added C2 funds

E-rate - Forms

FCDL Approval Letter

Form 470 Open Bidding Process	Form 471 Request Funding from USAC	Form 486 Receipt of Service	Form 472/474 Billing
I want services RFP Open and Fair	I have chosen and I want funding	I have started my services and I am compliant	472 Reimburse Me 474 Pay My Share

Application Process - Forms 470 & 471

- Form 470 - a request for services
  - Describe/list the eligible services you need (Issuing an RFP is optional)

- Form must be "open" for at least 28 days

- Providers review your service request and respond

- You evaluate responses and -- using cost as prime factor -- select a provider

- Then file Form 471 which lists the service, the provider, costs, discount, etc.

Organize Form 471 Information in Advance

- Create a spreadsheet including the headers:
  - 470 Number
  - Service/item for which funding is requested
  - Quantity or narrative describing service/item
  - Cost/month (service)
  - Unit cost (equipment)
  - Vendor name
  - Vendor SPIN
  - Contract number (if applicable)
  - Contract start and end date

Inside the Form 471

- USAC provides short 2 minute training videos on filing the Form 471
  - https://www.usac.org/e-rate/learn/videos/
  - Starting Your FCC Form 471
  - Creating Category 1 Funding Requests
  - Creating Category 2 Funding Requests

- Form 471 Category 1 Filing Guide *
- Form 471 Category 2 Filing Guide *

*Filing guides provided by Julie Tritt Schell, E-rate in Pennsylvania

Note: TEACH/BadgerNet Customers

- Existing contract for TEACH data circuit & internet access on BadgerNet
  - No Form 470 needed for these services

- TEACH files Form 471 for your TEACH data circuit - so you will not

- You *do* need to file a Form 471 for internet access

ISP service:
WiscNet on BadgerNet Customers

- If you do not receive a quotation for ISP service from AT&T (WiscNet on BadgerNet), your monthly cost for ISP service will be the same for FY 21 as it was for FY20

- You can fill in your FY21 Form 471 for ISP service by copying all of the information, including price, from your FY20 Form 471
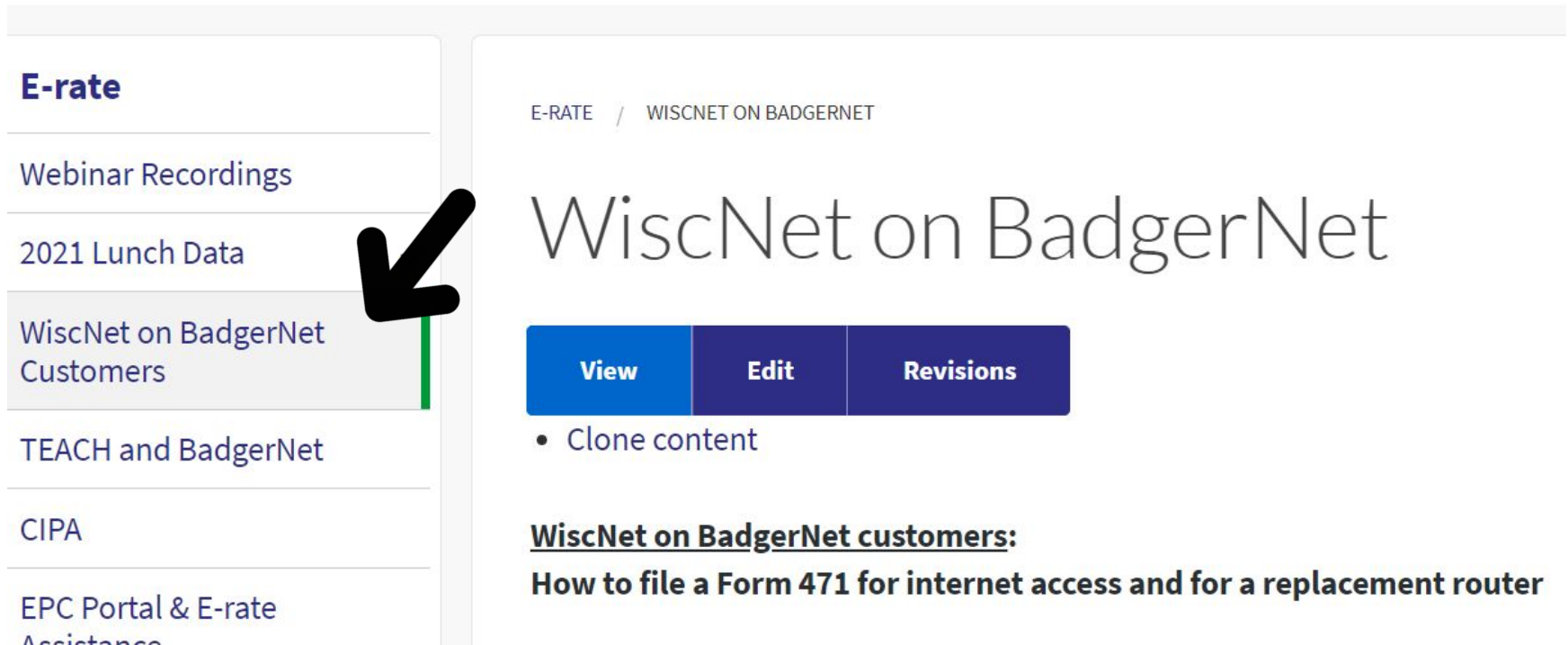
ISP service:
WiscNet on BadgerNet Customers

- Detailed instructions for filing are [here](#)

- If you have not already upgraded your WiscNet router, information that you will need is [here](#)

Filing for a WiscNet Router Upgrade

(**www.dpi.wi.gov/erate**)

E-rate

Webinar Recordings

2021 Lunch Data

WiscNet on BadgerNet Customers

TEACH and BadgerNet

CIPA

EPC Portal & E-rate Assistance

E-RATE / WISCNET ON BADGERNET

WiscNet on BadgerNet

View | **Edit** | **Revisions**

- Clone content

WiscNet on BadgerNet customers:
How to file a Form 471 for internet access and for a replacement router

PIA Reviews

- Work together with reviewers
  - Ensure that your request is legitimate
- Note the deadline for response and be certain to meet it
  - If you cannot meet the deadline, request an extension
- Read the inquiry carefully and understand what it is asking you to document
  - If you are not certain, email (don't phone) your reviewer to request clarification or contact DPI
- Provide your documentation in a complete, clear, and well organized way

Application Timeline
(*Estimated Dates Based on Last Year's Timeline)

- **Now: Update EPC Profile with F/R lunch and enrollment**
  - Use DPI <u>Provided</u> Data, https://dpi.wi.gov/erate/2021-lunch-data
  - January 7, 2021: EPC Profile Window Closes
- **Now: Review CAT 1 and 2 Needs & File Form 470**
  - Target for filing by end of January
  - Drop dead date is <u>28 days before</u> Form 471 deadline
  - Must be posted for a minimum of 28 days
  - Assume a 471 deadline of late March
  - Evaluate responses with Bid Evaluation Matrix -- using cost as prime factor
- **Form 471 Filing Window Opens** (January 11, 2021 - March 19, 2021)

Thank You

https://dpi.wi.gov/erate

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