

MBLC Getting Prepared for E-rate

Massachusetts Board of Library
Commissioners
November 1, 2023

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Today's Agenda

- Accounts
 - FCCRN
 - EPC
 - SAM.gov (UEI)
 - Form 498
- Pre-Procurement
 - Procurement Guidelines
 - Steps to take pre-470

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Accounts!

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Accounts: FCCRN

- FCC Registration Number (FCCRN or Frn)
 - Serves as registration with Federal Communications Commission
 - Linked to EIN
 - Can have multiples for one EIN
 - One may already exist for your EIN – do a search first!
- Two separate steps
 - Create user account
 - Register for FCCRN
 - Start by going to <https://www.fcc.gov>

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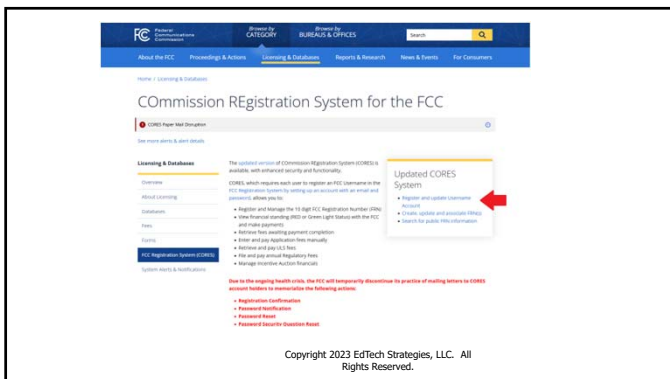
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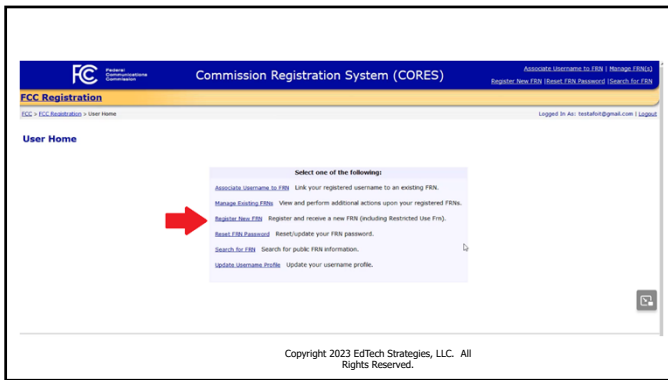


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Accounts: FCCRN

- FCCRN is assigned immediately
- FCCRN does not expire
- Once you have FCCRN, you can tackle EPC

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Accounts: EPC

- E-rate Productivity Center (EPC) administered by USAC
- All applications and related actions done through EPC
- Two account levels to consider:
 - Entity account (for the library)
 - User account(s) (for the staffer(s))

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Accounts: EPC Entity Accounts

- Entity accounts are identified by a Billed Entity Number (BEN)
- Every library should already have a BEN
 - MBLC has worked with USAC to create BENs (in process)
 - If a BEN already exists, you may only need to have a user account created and associated with the BEN
 - If a BEN does not already exist, you will need to work with USAC to create the BEN
- Check for BEN using Entity Search Tool:
<https://opendata.usac.org/E-rate/E-Rate-Entity-Search-Tool/59r2-zbdq>

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Accounts: EPC Entity Accounts

- If EPC entity does not exist, reach out to USAC: 888-203-8100 to create BEN and user account. You need to provide (on letterhead):
 - Entity Legal Name
 - Address (physical and mailing)
 - County Name
 - Phone number
 - FCCRN
 - Main library needs BEN of school district
 - Urban/Rural Status
 - Library Type (public/private, part of library system, main library, part of library consortium (network), bookmobile, etc.)
 - Library square footage

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Accounts: EPC User Accounts

- Linked to email addresses and non-transferrable
- User accounts require name, email, title, and whether the user is the entity account administrator for the entity
- Request generally needs to be on library letterhead
- Administrator is key: administrator sets the rights for all the other users

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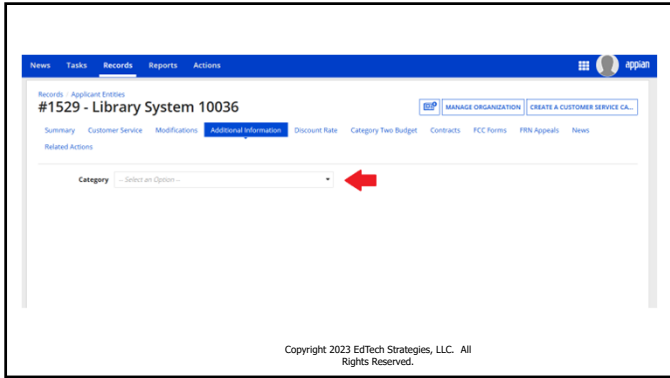
Accounts: EPC Entity Verify Information

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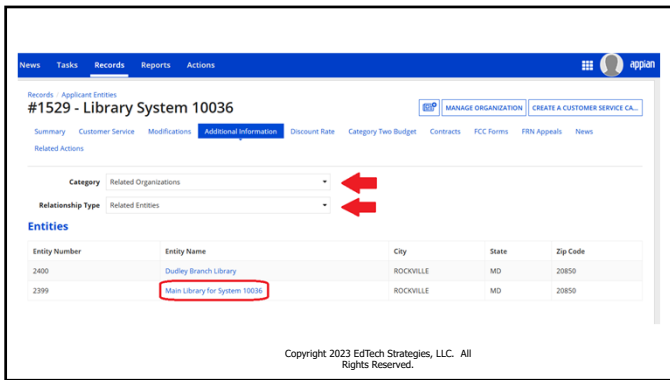
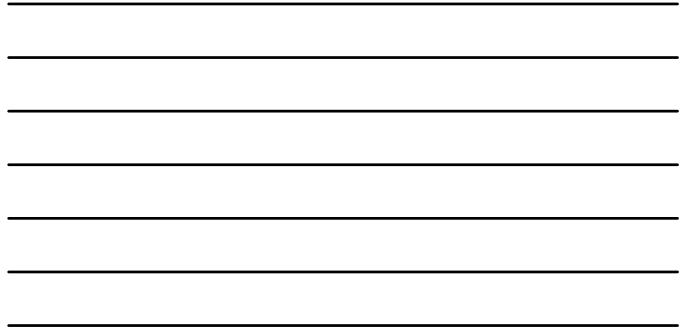
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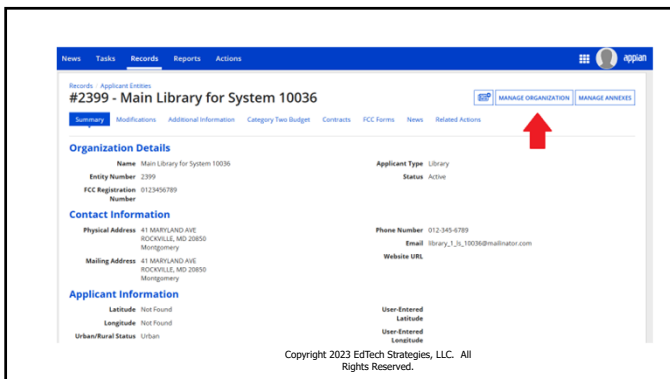
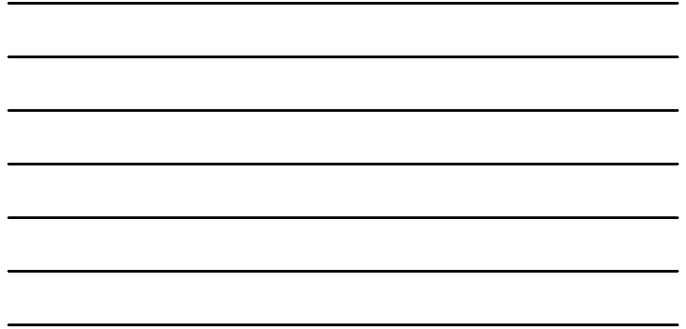
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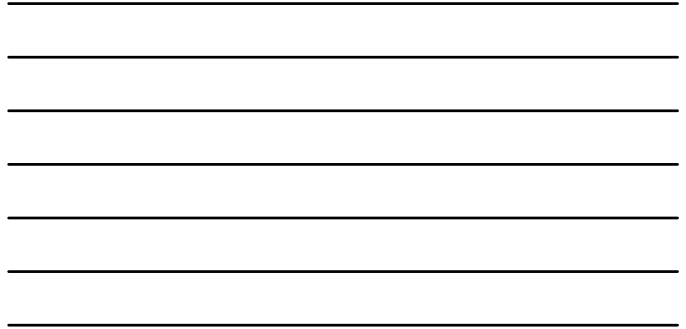
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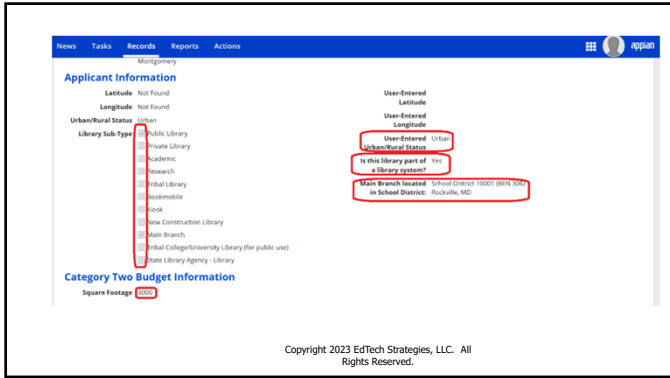


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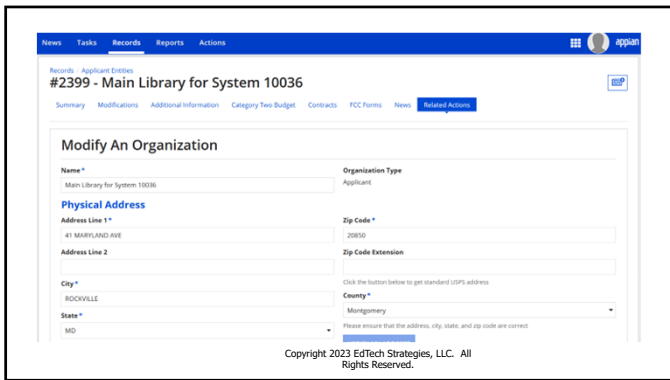
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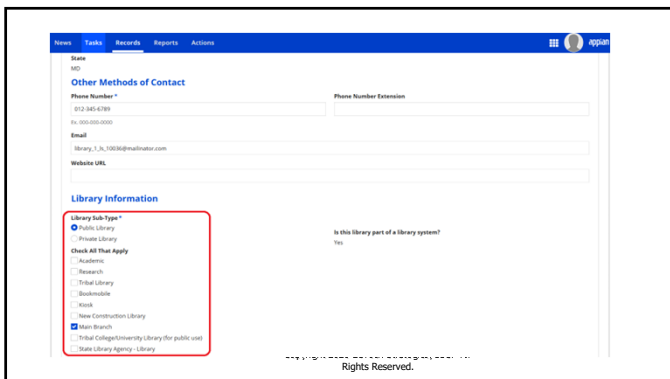
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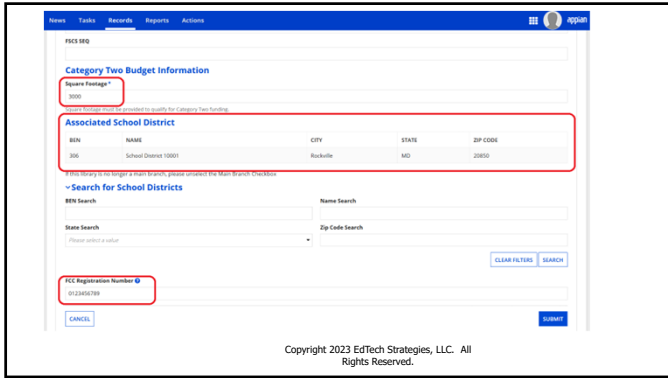
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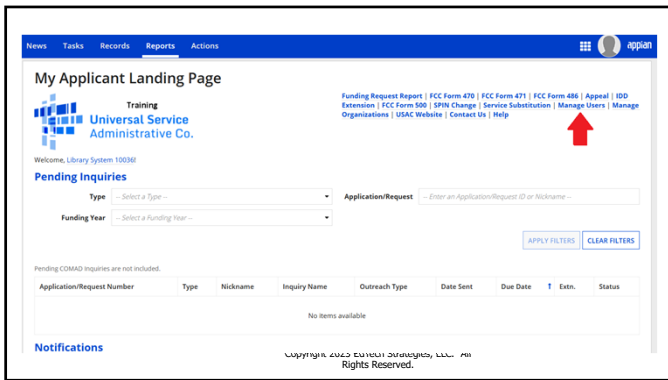


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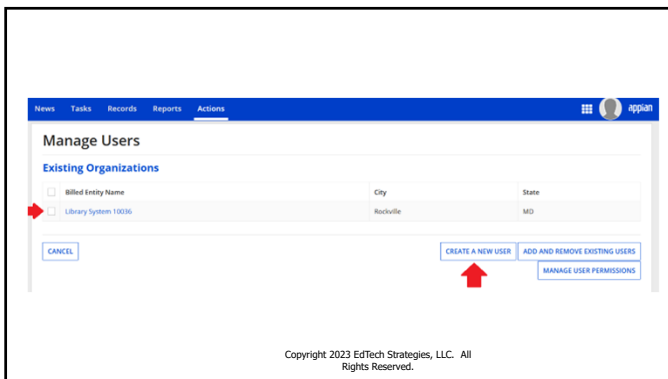
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News Tasks Records Reports Actions

Create A User for Library System 10036

User Details

User Type
Applicant

First Name* [Red Box] Job Title* [Red Box]
 Last Name* [Red Box] Phone Number* [Red Box]
 Middle Initial [Red Box] Phone Extension [Red Box]
 Email* [Red Box] Confirm Email* [Red Box]

Will be used in the username for the new account.

Address

Address Line 1* [Red Box] Country [Red Box]
 30 Maryland Ave Montgomery

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News Tasks Records Reports Actions

Rockville
State* MD

User Permissions

In the table below, you can designate the permissions that you wish to give to each of your users for the various tasks you can complete in the portal. This table will continue to grow as more functionality comes online.

- Full rights users can start, complete, submit and certify forms.
- Partial rights users can start and enter data in the forms, but cannot submit and certify them.
- View Only users can only see forms created by other people in your organization but cannot create forms themselves.
- Form 498 School or Library Officials can start, complete, submit, certify, modify, and deactivate Forms 498.
- Form 498 General Financial Contacts can start, complete, and submit Forms 498, but cannot certify new or updated Forms 498 or deactivate existing Forms 498.
- Post-Commitment Full and Partial rights user can start, complete, and submit Spin Change and Service Substitution requests. Post-Commitment View Only rights can view the submitted Spin Change and Service Substitution requests.

Apply All	470 Permission	471 Permission	BEAR/472 Permission	498 Permission	Post-Commitment Permission	498 Permission	Appeals Permission
View Only	View Only	View Only	View Only	No Access	View Only	View Only	View Only

CANCEL CONTINUE

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News Tasks Records Reports Actions

Manage Users

Existing Organizations

Billed Entity Name	City	State
Library System 10036	Rockville	MD

CANCEL CREATE A NEW USER ADD AND REMOVE EXISTING USERS
 MANAGE USER PERMISSIONS

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News Tasks Records Reports Actions

Manage User Permissions

Organization Details

Name: Library System 10036
Address: 39 Maryland Ave, Rockville, MD 20850, Montgomery
FCC Registration Number: 0123456780
Organization Type: Applicant
Phone Number: 012-345-6789
Email: library_sys_10036@mailinator.com

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Name	Email	Apply All	470 Permission	471 Permission	BEAR/472 Permission	498 Permission	Post-Commitment Permission	496 Permission	Appeals Permission
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News Tasks Records Reports Actions

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Name	Email	Apply All	470 Permission	471 Permission	BEAR/472 Permission	498 Permission	Post-Commitment Permission	496 Permission	Appeals Permission
First Name Last Name	lu_user_1000@mailinator.com	Full	Full	Full	School or Library Official	Full	Full	Full	Full
Non-Admin operator	ajaym@mail.com	Full	Full	Full	School or Library Official	Full	Full	Full	Full

CANCEL Submit

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Accounts: EPC

- Timing is everything: EPC is going offline from 11/3/2023 – 11/6/2023
- MBLC reached out to USAC to update library information and has provided those updates, which USAC has agreed to enter
 - As of 10/31/2023, the updates are not yet complete but hopefully coming soon

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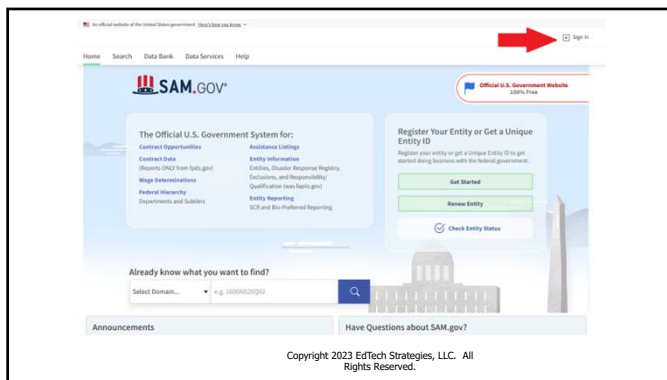
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Accounts: SAM.gov

- SAM.gov is a government-wide entity database
- Used for a wide variety of grants and other federal funding opportunities
- NOT required at the beginning of the E-rate process, but may be required at the end of the process
- Has both account (individual) and entity (library) levels of registration
 - Entity registrations need to be renewed annually
 - Entity registrations require EIN and bank account number
- Entity Registrations can take 6+ weeks

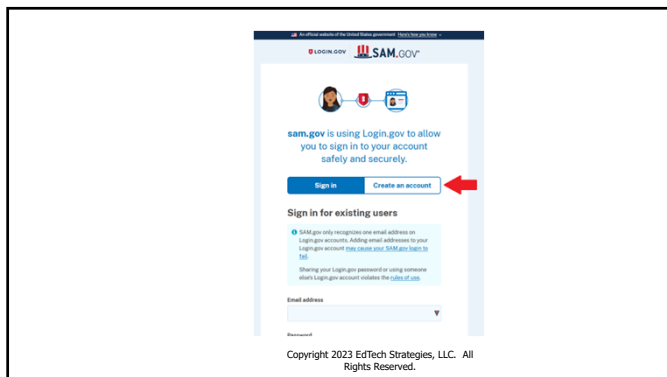
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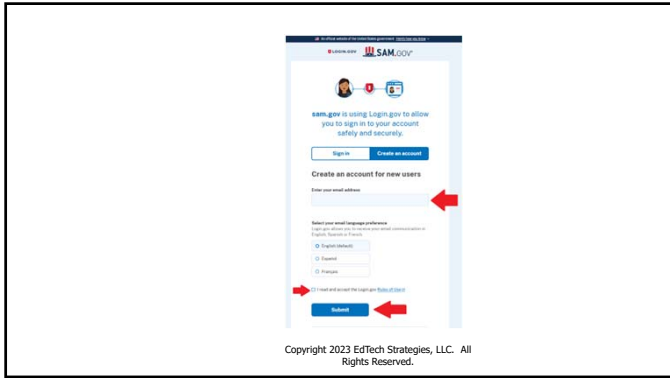
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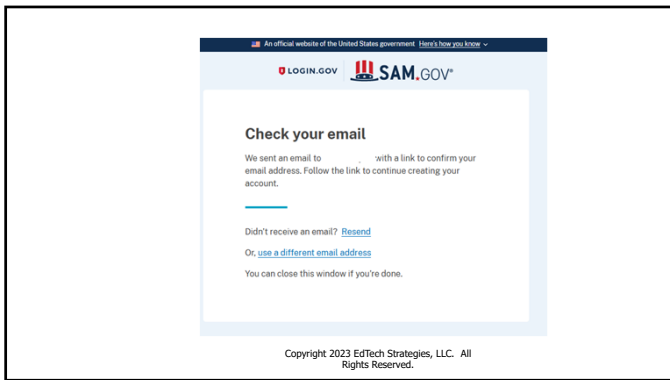


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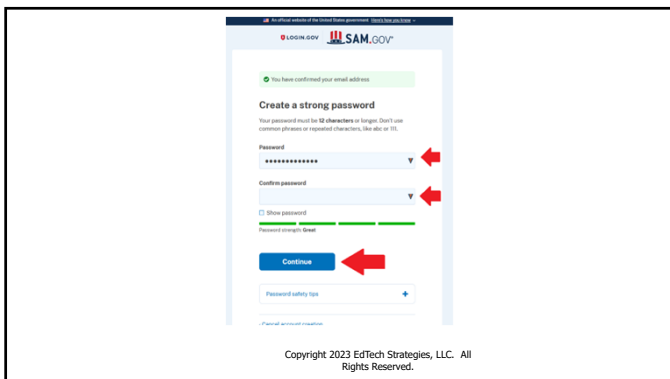
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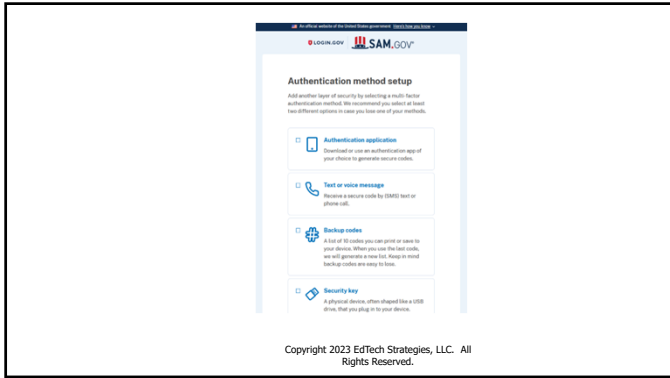
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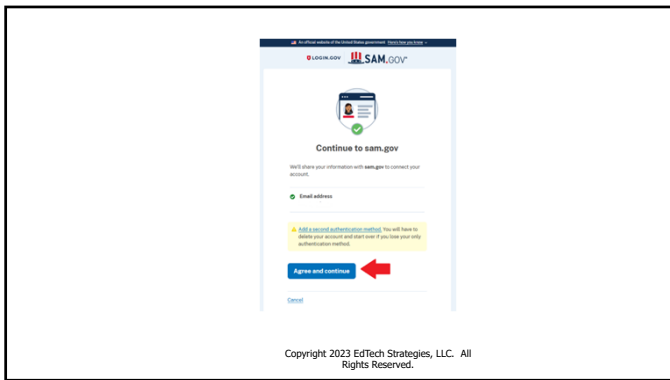
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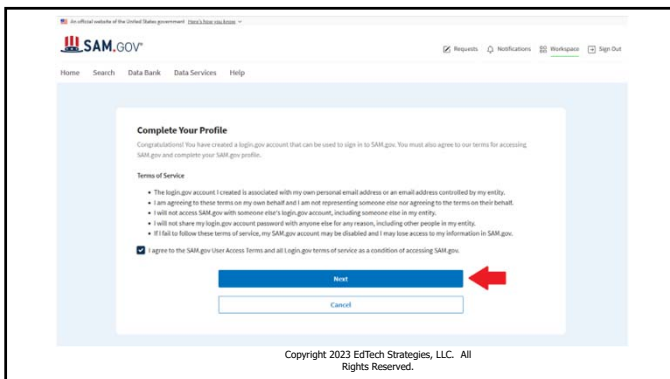
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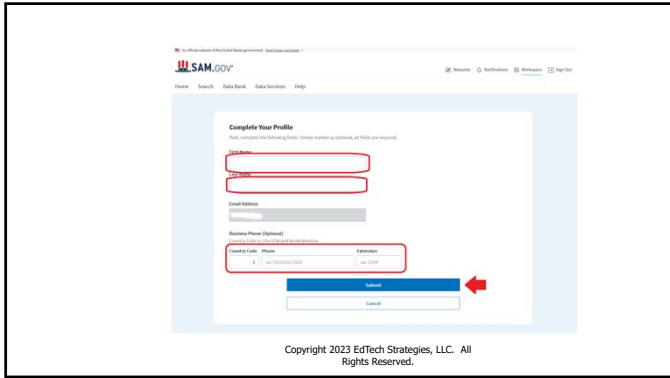
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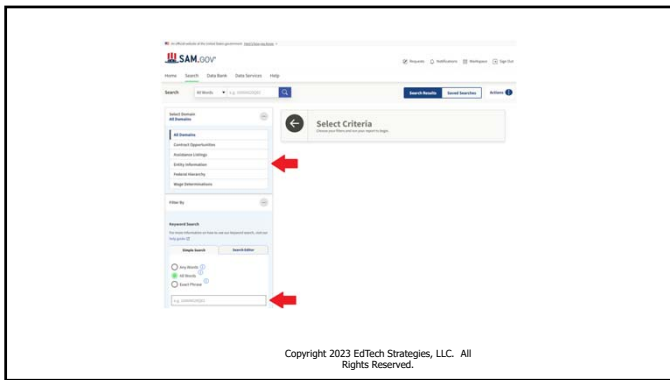
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Accounts: SAM.gov

- If an entity does not exist in SAM.gov, you will need to create one
- Video available from feds at https://www.youtube.com/watch?v=ERuhYy14Nag&list=PLvdwyPgXmxxVVLm5A_xh8R4k4HZI2thnJ8&index=53
- In addition to typical information, you will need:
 - EIN
 - CAGE code (if applicable; if you don't have one, one will be assigned)
 - Bank information for transfers (account type, routing number, account number)
- There is a LOT of information requested in the registration. Most of it doesn't apply to libraries
- Remember, registrations can take 6+ weeks

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Accounts: Form 498

- Technically not an account – a form that needs to be filed within EPC
- Provides USAC with banking information
 - Account number
 - Routing number
 - Subsequent, poorly documented step requires sending a voided check or similar proof of account information
- Not required until the invoicing part of the process
- Banking information should match what you input into SAM.gov

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Getting Prepared for Procurement

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Getting Prepared for Procurement: Eligible Services

- Review the eligible services piece of the prior presentation and eligible services list
- Identify the services of interest
 - C1: transport, Internet, or both? Speeds/bandwidth? Locations?
 - C2: quantity, make, model of preferred solution(s). Installation? Locations?
- Letters of Agency (if applying on behalf of other entities)

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Getting Prepared for Procurement: Eligible Services

State Master Contracts

- Will cover process in detail in next session. May provide an easier path
- Recommend looking at ITT72
 - "Category 4" in this contract covers broadband services
 - "Category 6" in this contract covers dark and lit fiber
- MBLC is still working out how these interact with E-rate and will provide more information in the next training

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Getting Prepared for Procurement: Do's and Don'ts

Do:

- Figure out what equipment needs to be replaced
- Put together a list of the goods and services you're interested in
- Your own research on services that you want to procure
 - Are licenses required? What terms are available?
 - Installation? Configuration?
- Gather existing contracts and inventories together to determine existing contract expirations, license expirations, end of life dates for hardware, etc.

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Getting Prepared for Procurement: Do's and Don'ts

Don't:

- Talk with service providers about what you might want to procure
- Seek advice from service providers and options
- Ask for quotes from service providers on products (even for budgeting purposes)
- Accept **any** gifts from potential service providers


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 **Final Thoughts**

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 **Final Thoughts**

- RFPs, State Master Contracts, Forms 470, Bid Evaluation in next training. Future trainings will cover contracts, Form 471, and subsequent steps in the process
- Make sure your entity information is complete and your accounts are set up
- Don't be afraid to ask questions!
 - Ask us on mailing list!
 - CSC: 888-203-8100 or in EPC (under Actions "select", "Contact Us" to get answers from USAC)
- Make sure you stay in control of and monitor your applications
- Take advantage of E-rate if it can help you!
- Let us know if there are other topics you'd like to see covered

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