

# E-Rate Beginner Overview and Process

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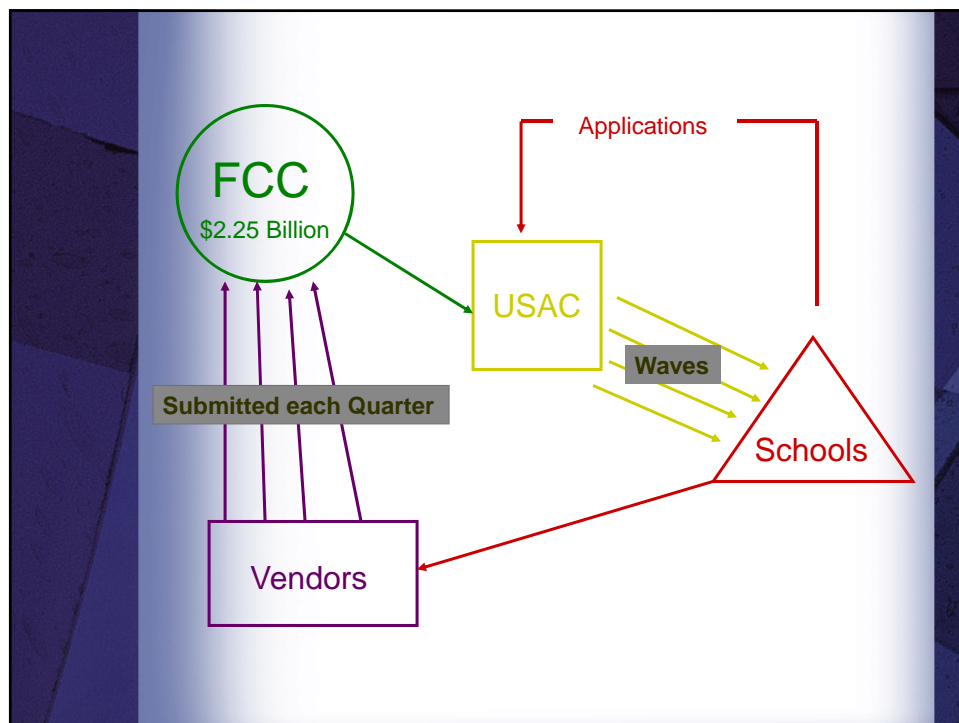
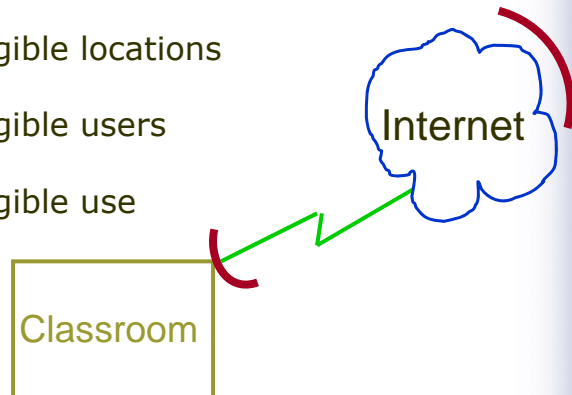
## Agenda



- What is E-Rate?
- What is the E-Rate Process?
- The "Basics" to the program
- Where to get help?

## What is E-Rate?

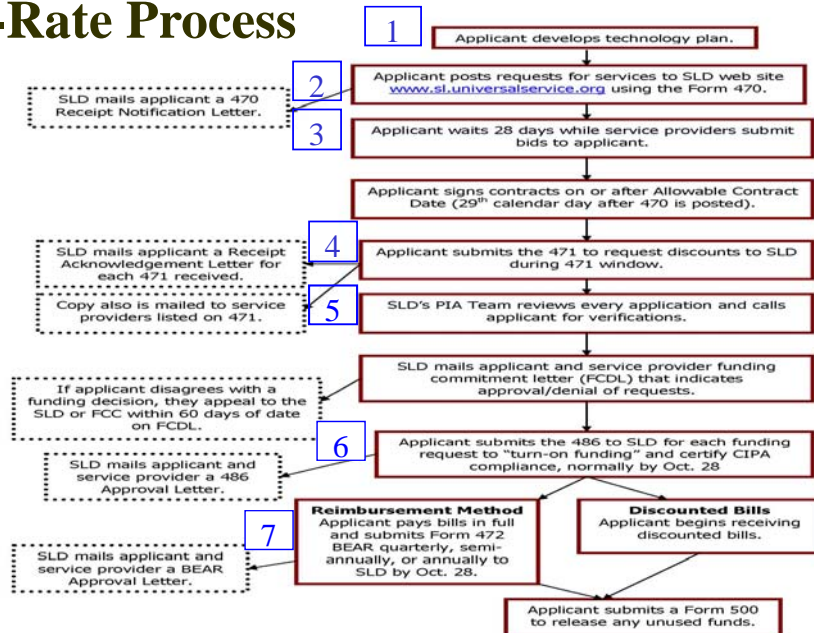
- Discounts from 20% to 90%
- Eligible services/equipment
- Eligible locations
- Eligible users
- Eligible use



## Application Process

1. Create Technology Plan  
STaR Chart  
ePlan System
2. File Form 470
3. Wait 28 days
4. File Form 471
5. PIA review and FCDL
6. File Form 486
7. Submit Invoices to USAC

## E-Rate Process



# The Basics



## Funding Timetable



- Funding commitments are made by funding year (July 1 – June 30)
  - **Recurring services** received July 1 – June 30 (**12 months**)
  - **Non-recurring services** delivered and installed July 1 – September 30 (**15 months**)

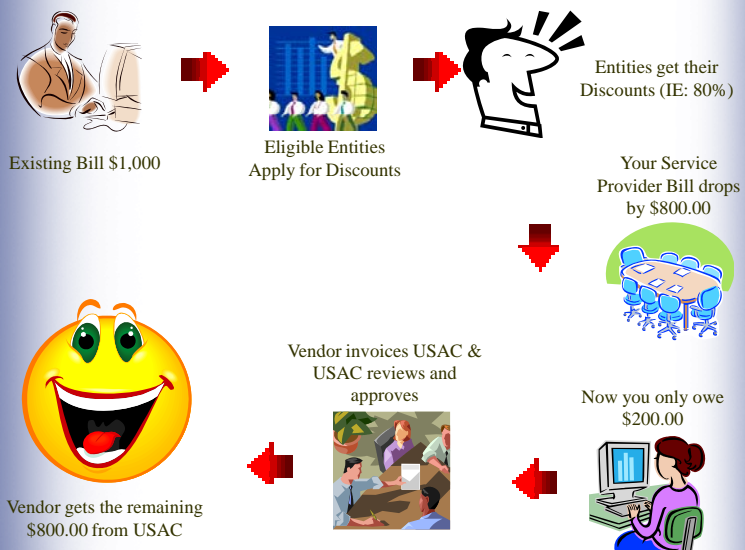


# How do you get your Money?



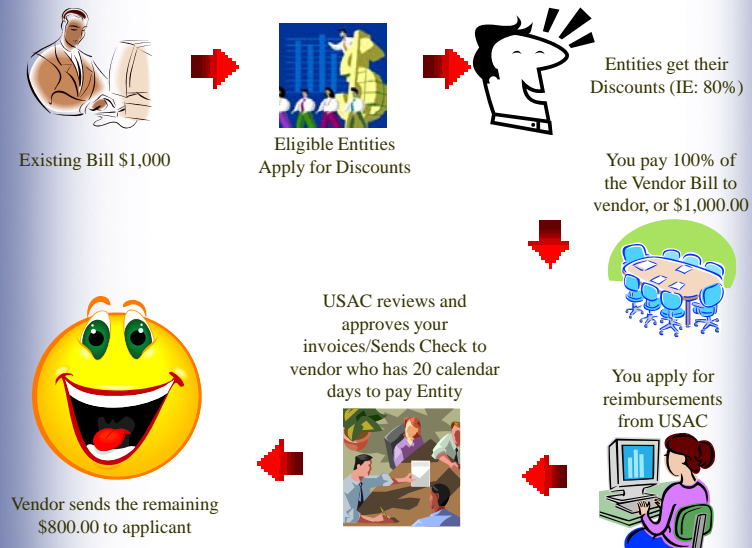
## ◆ Discounts Or ◆ Reimbursements

### How Do Discounts Work?



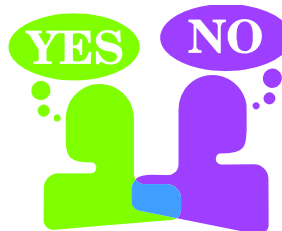


## How Do Reimbursements Work?



## Eligible Services List (ESL)

- What is the ESL?
  - The ESL is an annually created list of items that can be purchased by program participants to receive E-Rate support.
  - Simply stated, it's what you can and cannot buy in this program to receive E-Rate support.



## Eligible Services List

### ■ Four Categories



1. Telecommunications Services
2. Internet Access
3. Internal Connections (IC)
4. Basic Maintenance of IC

## Funding Priorities

### Priority One



Telecommunications  
Internet Access

### Priority Two



Internal Connections (IC)  
Basic Maintenance of IC

## Telecom Services

- Basic Services (do NOT require a technology plan)
  - 800 service
  - Centrex service
  - Local and long distance phone service
  - POTS (Plain Old Telephone Service)
  - Radio loop
  - Wireless telephone services

## Telecom Services

- Non-basic telecom services require a technology plan
  - All services listed as Digital Transmission Services
  - Includes but is not limited to: T-x, ATM, DSL, OC-x, Fiber Optic, DS-x, Frame Relay and PRI



## Internet Access (IA)

- Basic conduit access to the Internet, E-mail service, and web hosting are eligible IA services
- Basic conduits include but are not limited to:
  - Broadband over Power Lines (BPL)
  - Cable Modem
  - Digital Subscriber Line (DSL)
  - Satellite
  - T-x, DS-x, OC-x

## Internal Connections

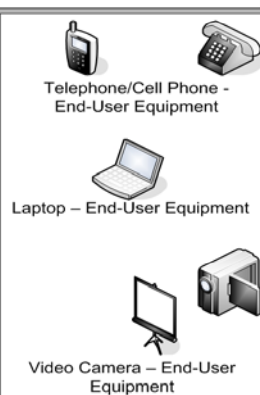
- Internal connections are the equipment and wiring necessary to receive services in the classrooms
- The things you buy, install at the district and track their location and function – for 5 full years

## Basic Maintenance of IC

- Ensures the necessary and continued operation of eligible internal connection components at eligible locations
- BMIC is a Recurring service
  - Delivery must be within July 1<sup>st</sup> – June 30<sup>th</sup>
  - Only eligible equipment can qualify for this service

## Basic Understanding of What's Eligible

**Schools must purchase**  
Not Eligible



**Potentially eligible in E-Rate**  
Eligible

To LAN (VoIP) or Voice Network



To LAN

Access Point – Data Distribution

To LAN

CODEC – Video Components

## Miscellaneous



- Eligible:
  - Installation
  - Activation
  - Initial configuration
  - Training
  - Shipping
  - Taxes and lease fees
- Ineligible:
  - Interest or Finance charges
  - Late Payment fees
  - Termination charges
  - Initial Planning
  - End-user training

## Where To Get Help

### Technology Planning & E-Rate Support (TPESC)

- Provides free training annually
- Provides free technical support for guidance
- Provides free technical support for STaR Chart and ePlan system
- <http://tpesc.esc12.net>
- E-Rate: 254-297-1123
- STaR Chart: 254-297-1275
- Tech Plan: 254-297-1275

### ESC Region 12 E-Rate Consulting

- An annual fee-based service that completes the E-Rate application process for district
- All forms are submitted for the client
- All deadlines are met
- All funding is collected
- Records management provided
- Our expert staff has a total of 21 years of E-Rate experience at the local, state, and federal level
- [www.esc12.net/erate](http://www.esc12.net/erate)
- Phone: 254-297-2911
- Fax: 254-297-1196

## Contact Information

- E-Rate Support  
[erate@esc12.net](mailto:erate@esc12.net) 254-297-1123
- Technology Planning  
[eplan@esc12.net](mailto:eplan@esc12.net) 254-297-1275
- STaR Chart Support  
[starchart@esc12.net](mailto:starchart@esc12.net) 254-297-1275

# Questions?