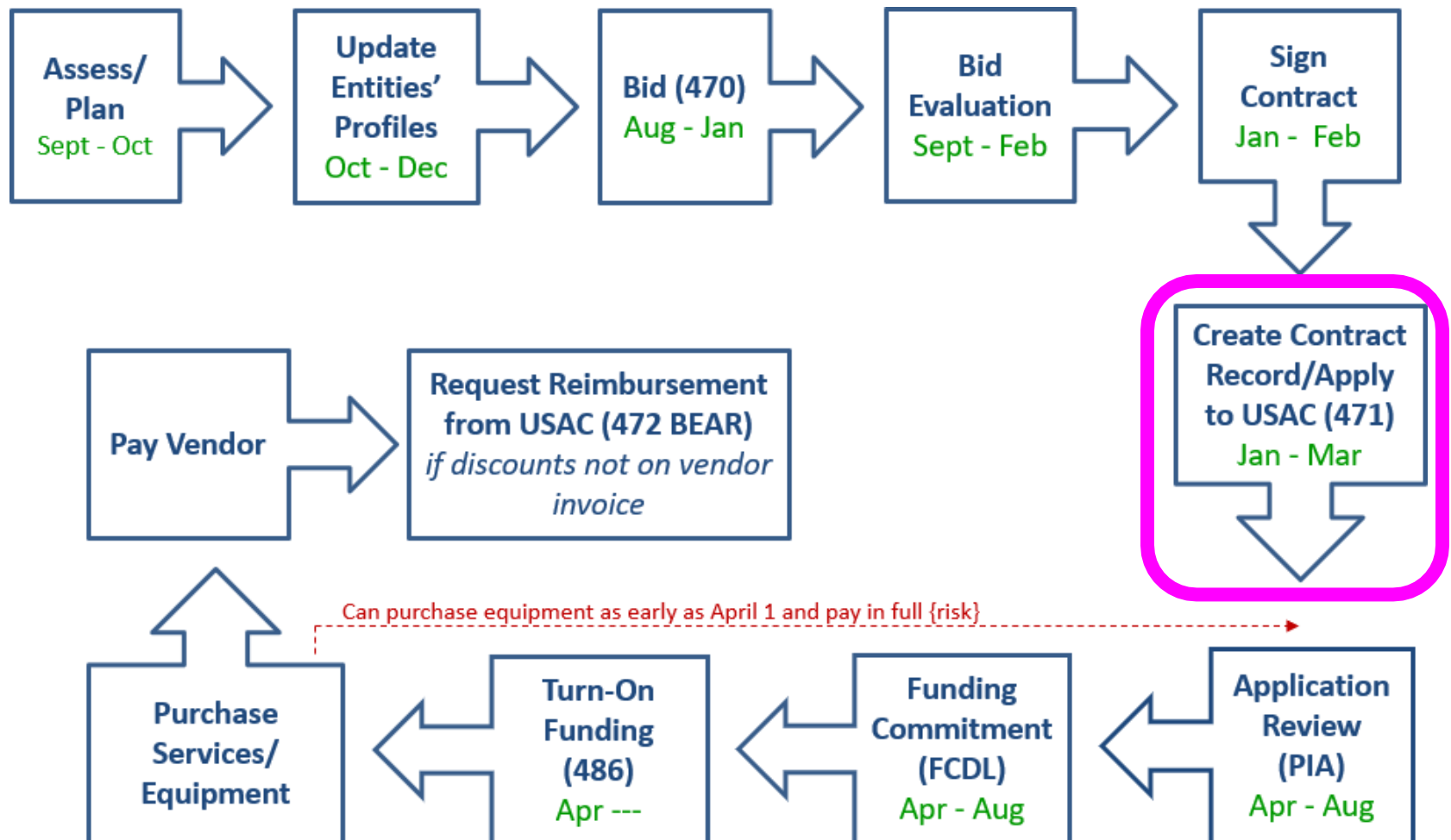# Creating Contract Records in EPC – FY 2022

Bid Contract

Apply $$

Presented by Julie Tritt Schell
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for the Pennsylvania Department of Education
January 2022

You are *here* in the E-rate process:

Assess/Plan
Sept - Oct

→

Update Entities' Profiles
Oct - Dec

→

Bid (470)
Aug - Jan

→

Bid Evaluation
Sept - Feb

→

Sign Contract
Jan - Feb

↓

Create Contract Record/Apply to USAC (471)
Jan - Mar

↓

Request Reimbursement from USAC (472 BEAR)
if discounts not on vendor invoice

←

Pay Vendor

↑

Purchase Services/Equipment

←

Turn-On Funding (486)
Apr ---

←

Funding Commitment (FCDL)
Apr - Aug

←

Application Review (PIA)
Apr - Aug

Can purchase equipment as early as April 1 and pay in full {risk}

Purpose of Contracts Module

- During the creation of a Form 471, each FRN requires you to indicate how you will be purchasing the requested services – either via a contract, tariff or Month-to-Month (MTM):

FRN Contract

How are the services for this FRN being purchased?

Contract information is stored in your Profile; you can add a new Contract at any time. Details about your Tariff and Month-to-Month services will be entered in your FRN.

| Contract | Tariff | Month-to-Month |

- Instead of entering the bidding/contract information as part of the Form 471 application, this information is entered in EPC as a Contract Record (CR)
  - A single Contract Record is created each time a <u>new</u> contract is signed
  - That Contract Record is then referenced to the applicable FRN
- Create Contract Records in the Contracts Module <u>before</u> starting the Form 471
- No information should be entered in the Contracts Module for MTM FRNs

Contract Records – Additional Details

When <u>TO</u> Create a New Contract Record

- Newly signed contracts
  - Create a new Contract Record each time you sign a new contract
  - Do not create a CR for each year of the contract
- Errors on previously-submitted Contract Records
  - If you notice that any data in your Contract Record from last year is inaccurate (such as the 470 #, SPIN #, voluntary extensions, etc), create a new CR and reference the accurate Contract Record on your FRN (ignoring the old one)
  - <u>There is no way to edit an existing Contract Record after it's been submitted</u>
    - Likewise, there's no way to <u>delete</u> a submitted CR (it will just die on the vine)

When <u>NOT</u> to Create a New Contract Record

  - If you created a Contract Record in a previous year for a multi-year contract, do not create a new one. Just reference the original Contract Record when creating your 471
  - If your previous Contract Record contained voluntary extensions, and you wish to exercise one of those extensions for FY 2022, do <u>not</u> create a new CR
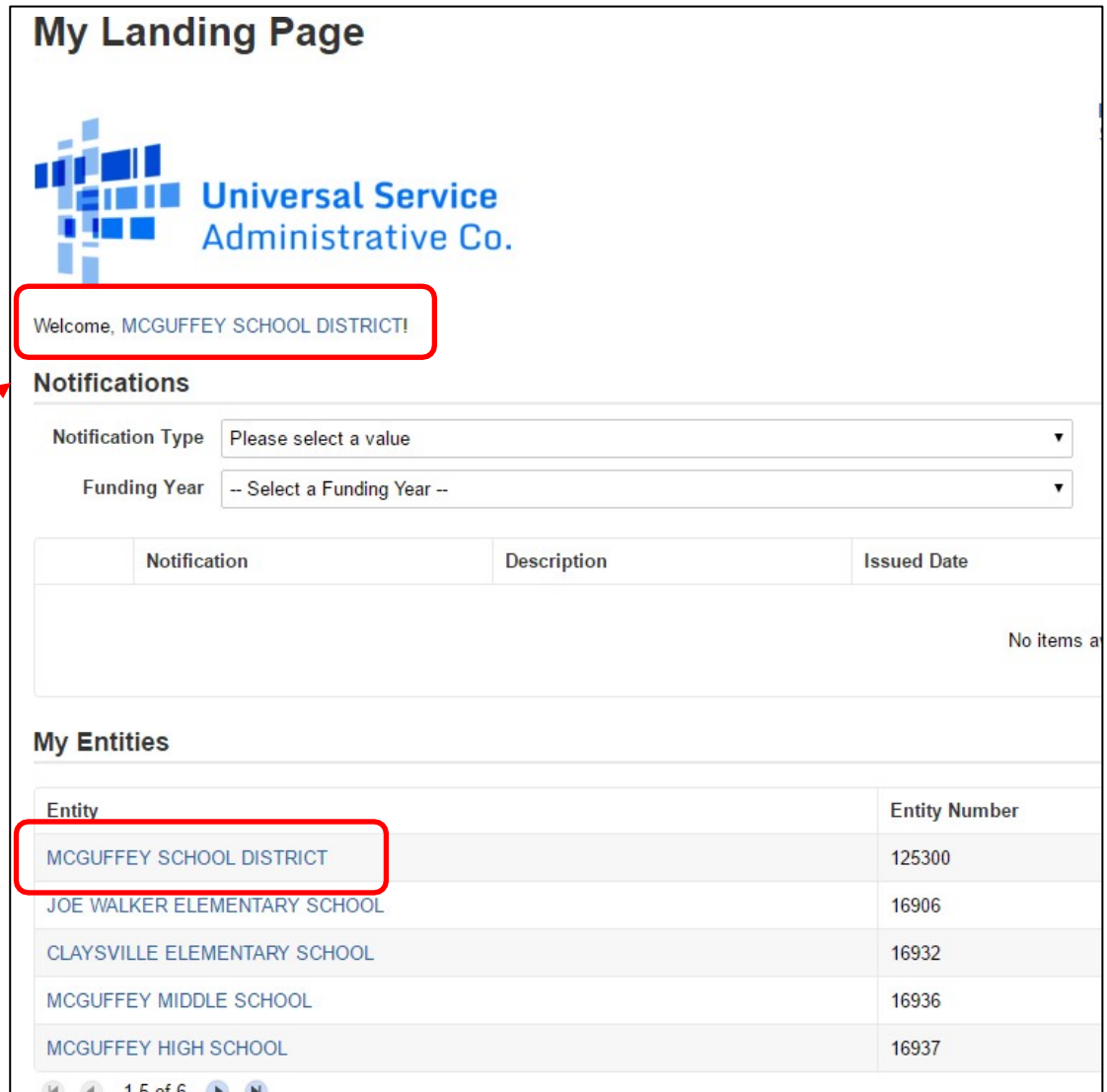   - Simply change the Contract Expiration Date in the FRN when you create your Form 471

Contract Records – Additional Details

- **Uploading Actual Contracts in CR**
  - Although the system asks if you want to upload a copy of your signed contract into EPC, you aren't required to do so
  - However, <u>I highly recommend that you upload copies of all signed Category 2 contracts</u> as PIA routinely asked for them last year if they weren't part of your CR.

- **Contract Expiration Dates**
  - The Contract Module doesn't ask for the Contract Expiration Date (CED) -- this data element must be entered in each funding request within the Form 471 itself
  - Why? Because due to voluntary extensions in some contracts, it's possible that the CED can change from year to year

- **PEPPM Mini-Bid-Based Contracts**
  - If you conducted a PEPPM Mini-Bid (in lieu of a Form 470), refer to a separate Guide related to the data that should be entered in the Contract Module for those contracts
  - Except for the PEPPM Form 470 #, you will rely <u>entirely</u> on the contract information that your district signed with the vendor.

- **Be Prepared**
  - It's a good idea to have the information in-hand. Use the CR Data spreadsheet to compile the required data prior to starting the Contract Module

Where Is the Contract Module?

From the EPC Landing Page, click on the name of your entity from either location:
- Next to "Welcome"
- Top of My Entities list

My Landing Page

Universal Service Administrative Co.

Welcome, MCGUFFEY SCHOOL DISTRICT!

Notifications

| Notification Type | Please select a value ▼ |
| Funding Year | -- Select a Funding Year -- ▼ |

	Notification	Description	Issued Date
			No items a
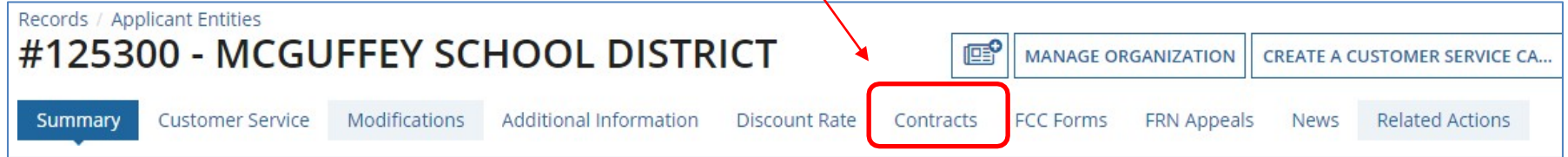
My Entities

Entity	Entity Number
MCGUFFEY SCHOOL DISTRICT	125300
JOE WALKER ELEMENTARY SCHOOL	16906
CLAYSVILLE ELEMENTARY SCHOOL	16932
MCGUFFEY MIDDLE SCHOOL	16936
MCGUFFEY HIGH SCHOOL	16937

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Where Is the Contract Module?

- Then click on Contracts on the top toolbar

Navigation to "Manage Contracts"

Click on the "Manage Contracts" button

Records / Applicant Entities

#125300 - MCGUFFEY SCHOOL DISTRICT

MANAGE CONTRACTS

Summary | Customer Service | Modifications | Additional Information | Discount Rate | **Contracts** | FCC Forms | FRN Appeals | News | Related Actions

Manage Contracts

Contracts - MCGUFFEY SCHOOL DISTRICT (BEN: 125300)

Use the dropdown to select the type of contract you would like to edit or remove. Click the Add a New Contract button at any time to create a new contract for your organization.

Contract Type | My Contract Drafts ▼

My Contract Drafts
You have no contract drafts for this organization. Click the Add a New Contract button to create a new contract.

CLOSE   **ADD A NEW CONTRACT**   EDIT   DELETE

Click on the "Add a New Contract" button

Contract Information

MCGUFFEY SCHOOL DISTRICT (BEN: 125300) - - Contract ID #

Contract Information	Establishing FCC Form 470	Service Provider	Contract Dates	Pricing Confidentiality	Confirmation

Here you will enter preliminary information about this contract, as well as your account number, if you know it.

Contract Information

Enter a nickname to easily identify this contract ❷ *

[   ] ⟵

A descriptive nickname of contract will help you identify it later. Hint: Use a really good nickname! For example: "Year contract signed – Vendor Name - service/equipment type"

"2022 – Comcast – Lit Fiber"

Contract Number ❷

[   ] ⟵

optional

Enter contract number, N/A or leave blank. This is optional

CANCEL   SAVE & CLOSE   SAVE & CONTINUE

9

Contract Uploads

EPC allows you to, but does not require you, to upload a copy of your contract.

Here you will have the option to upload contract documents, including a description of each document.

Contract Information

Contract ID #199259 ❓

A number is assigned by the system.

Note: Upload C2 contracts because PIA will ask you for them anyway.

Would you like to upload a copy of your contract? ❓

Select Yes or No depending on whether you are going to upload a copy of your contract. If Yes is selected, system will prompt you to upload the electronic file from your computer.

YES   NO

BACK   CANCEL   SAVE & CLOSE   SAVE & CONTINUE

Contract Uploads

Here you will have the option to upload contract documents, including a description of each document.

Contract Information

Contract ID #199259 ❔

Would you like to upload a copy of your contract? ❔

[**YES ✓**] [NO]

Contract Document Upload

Please upload and describe each document related to your contract.

📄 **2022 Comcast Lit Fiber WAN Contract**
DOCX – 48.88 KB

Describe this contract document.

A description may be added for each uploaded contract document.

📄 **2022 Comcast Lit Fiber WAN Exhibit A**
DOCX – 48.88 KB

Describe this contract document.

[UPLOAD] 🖱️ *Drop file here*

Multiple documents related to the same contract may be uploaded.

Contract Information

Here you will answer additional questions about this contract.

Contract Information

Is this contract based on a State Master Contract? @

| YES | NO ✓ |

Is this contract based on a multiple award schedule? @

| YES | NO ✓ |

Answer No, unless this is a PEPPM-related contract, then answer "Yes" and follow the PEPPM-specific answers provided in a separate message/Guide.

Answer No, unless this is a PEPPM-related contract, then answer "Yes" and follow the PEPPM-specific answers provided in a separate message/Guide.

Contract Information

Here you will answer additional questions about this contract.

Contract Information

Can other applicants piggy back off this contract? ❓

| YES | **NO ✓** |

Mostly likely answer is No.

Was this contract originally created by another applicant, and you then piggy backed off their contract? ❓

| YES | **NO ✓** |

Mostly likely answer is No.

Establishing Form 470/# Bids

Here you can use the search tool below to associate an FCC Form 470 with this contract.

Establishing FCC Form 470

Was an FCC Form 470 posted for the product and/or services you are requesting?

YES   NO

How many bids were received? @ *

Enter the number of bids that you received for this product or service.

Click on the "Yes" button to indicate you posted a Form 470.

Enter the number of bids received. It's important that you get this right in case you are ever asked during PIA or in an audit to supply the winning and losing bids.

Establishing Form 470 – Tricky!

Here you can use the search tool below to associate an FCC Form 470 with this contract.

Establishing FCC Form 470

Was an FCC Form 470 posted for the product and/or services you are requesting?

YES ✓   **NO**

Was your FCC Form 470 posted prior to Funding Year 2016?

YES   **NO ✓**   ←

Use the search tool below to find the establishing FCC Form 470.

Remember that the services in the contract had to be posted on the FCC Form 470.

How many bids were received? **@** *

3

Enter the number of bids that you received for this product or service.

Select "NO." This question only exists for t he rare occurrence that a contract was signed prior to FY 2016 and does not yet have a contract record created.

Remember you cannot file your Form 471 before the Allowable Contract Date.

Be careful to choose the correct answer!

Searching EPC for the Establishing Form 470

Locate all of your FY 2016 - FY 2022 Form 470s by clicking "Search"

Service Provider Information

Here you will associate the service provider listed on the contract.

Service Provider

Account Number (e.g., billed telephone number)

optional

If your service provider has given you one or more Account Numbers, please enter them.

Please select the service provider for this contract using the search below.

Enter account number if you have one. Optional field that may be left blank.

Search Service Providers

Search by SPIN

Search by Name (Full or Partial)

Enter the SPIN or Name of the Service Provider and then Search.

CLEAR FILTERS   SEARCH

Service Provider Information

Results matching the criteria you used will appear in a list.
Select correct SPIN or clear filter and search again.

Search Service Providers

Search by SPIN

Search by Name (Full or Partial)

comcast

CLEAR FILTERS   SEARCH

*

	SPIN	Name	Doing Business As	State
☑	143003990	Comcast Business Communications	Comcast Business Communications	PA
☐	143025596	Comcast of Oregon II, Inc.		PA
☐	143025449	Comcast of Oregon Washington		OR
☐	143026653	Comcast Cablevision of Fort Wayne, LLP		IN
☐	143013989	Comcast Cable Communications, Inc.		CA

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Contract Dates

Need to choose "Yes" or "No" for Multi-Year Contract

Here you will answer additional questions about the dates on your contract.

Contract Dates

Is this a multi-year contract?

What is the date you awarded your contract? *

mm/dd/yyyy

The Contract Expiration Date will be entered in each FRN where you cite this contract.

YES   NO

BACK   CANCEL

Enter Contract Award Date
Words of Caution: *Your Contract Award Date must be **on or after** the Allowable Contract Date (which is the 29th day after you posted your 470) and **before** the filing and certification date of the Form 471.*

Contracts w/Limited Extensions

Select "No" if contract has no extensions.
Select "Yes" if contract has limited # of extensions available.

Contract Dates

Does this contract include voluntary extensions?

Provide last possible contract expiration date if all extensions are used

YES ✓   NO

# of extensions remaining on the contract (stated in # of *years*)

of *months* remaining on the contract if all extensions were to be used (include months in upcoming funding year)

What is the contract expiration date if all extensions are exercised? *

mm/dd/yyyy

How many extensions are left on the contract? *

Enter the number of voluntary extensions that you could still exercise on this contract.

What is the total remaining length of the contract if you exercised all extensions (in months)? *

Enter the number of months that would remain in the contract if you exercised all voluntary extensions.
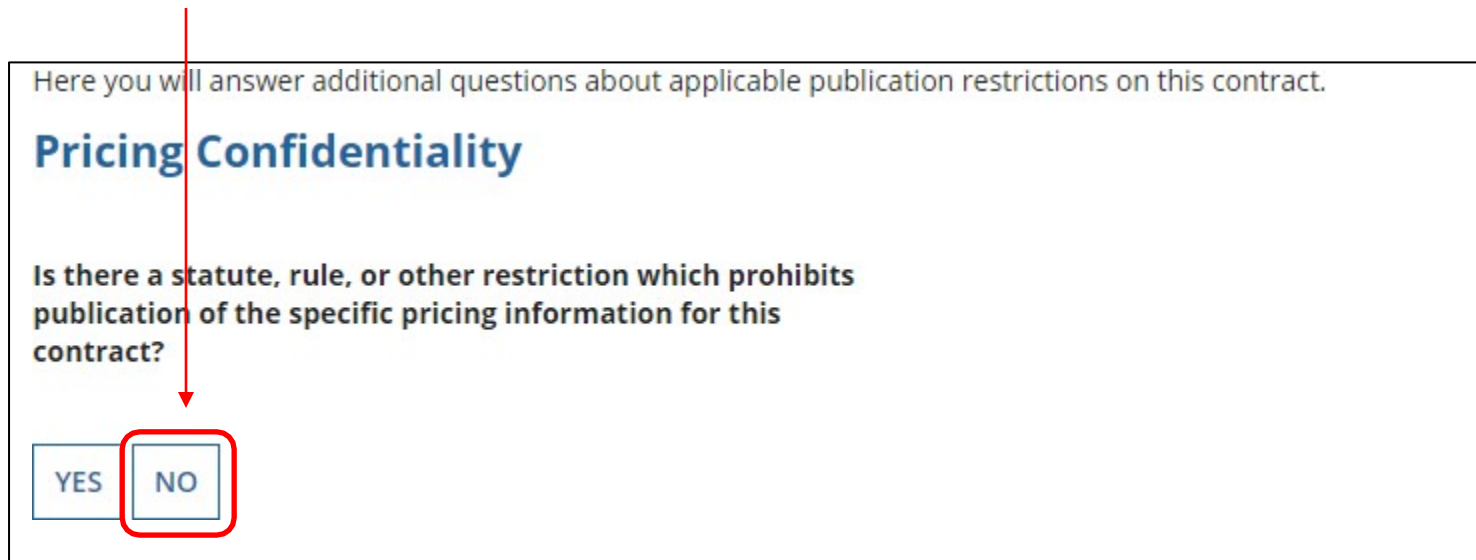
Pricing Confidentiality

Always select "No" to indicate there is no legal restriction to prevent the publication of the pricing information for the contract.

Here you will answer additional questions about applicable publication restrictions on this contract.

Pricing Confidentiality

Is there a statute, rule, or other restriction which prohibits publication of the specific pricing information for this contract?

| YES | NO |

Word of Caution: *There must be an actual statute in place in order to answer "Yes." It is not permissible for the vendor to simply state that their pricing is confidential.*

Confirmation Page

A summary page with the contract information will be displayed.

If the information needs to be revised, select "Save and Close" and you can then retrieve the draft information and edit it.

If the information is correct, and you want to finalize the submission, select "Complete."

Word of Caution: Once submitted, the information cannot be deleted or revised.

Create Contract: Confirmation

MCGUFFEY SCHOOL DISTRICT (BEN: 125300) - 2018 - Comcast - Lit Fiber WAN - Contract ID #199259

Last Saved: 1/17/2018 4:12 PM EST

| Contract Information | Establishing FCC Form 470 | Service Provider | Contract Dates | Pricing Confidentiality | Confirmation |

Please review the information and submit the information below to complete this contract.

Contract Information

Nickname	2018 - Comcast - Lit Fiber WAN	Contract ID	199259
Can Other Applicants Piggy Back Off This Contract?	No	Contract Number	
		Based on a State Master Contract?	No
Piggy Backed Off Another Contract?	No	Based on a Multiple Award Schedule?	No

Establishing FCC Form 470

Establishing FCC Form 470	#180007718	Number of Bids Received	3

Service Provider

Service Provider	Comcast Business Communications (SPIN: 143003990)	Account Number	

Contract Dates

Award Date	1/17/2018	Multi-Year Contract?	Yes
Includes Voluntary Extensions?	Yes		

Extension Details:
- There are 1 remaining voluntary extensions.
- There are 24 months remaining in this contract if all extensions are exercised.
- This contract expires on 6/30/2020 if all extensions are exercised.

Pricing Confidentiality

There is no rule, statue, or other restriction which prohibits publication of the specific pricing information for this contract.

Supporting Documents

Document	Description
2018 - Comcast - Lit Fiber WAN Contract	
2018 - Comcast - Lit Fiber WAN Contract Exhibit A	

BACK   CANCEL

SAVE & CLOSE   COMPLETE

List of Submitted Contract Records

Records / Applicant Entities

#125300 - MCGUFFEY SCHOOL DISTRICT

[MANAGE CONTRACTS]

Summary   Customer Service   Modifications   Additional Information   Discount Rate   **Contracts**   FCC Forms   FRN Appeals

News   Related Actions

Submitted Contracts

Contract ID	↓	Contract Number	Contract Nickname	Award Date	
22883			2022 - McGuffey – Lit Fiber	1/20/2022	View
16480			2014 - Fiber WAN - Comcast Contract	3/21/2014	View

Submitted contracts appear in the Contracts Records List and will be available for selection when filing a Form 471

Editing or Deleting a *Draft* Contract

From your Landing Page, select Entity Name, then "Contract" and then "Manage Contracts."
The list of draft contracts will appear. Check the box for the draft and select "Edit" or "Delete."
Note: Submitted contracts cannot be edited or deleted.