

E-rate Resource Center Checklist

Whether you are new to the program or just getting back into E-rate, we have put together a few things to help you get started. Our checklist is designed to help you get up to speed as quickly as possible. If you are new to E-rate, we recommend going through each item on the checklist to make sure that you have everything you need to be successful in this program.

1. **Service Provider Identification Number (SPIN) FCC Form 498:** Service providers must first obtain a Service Provider Identification Number (SPIN / service provider 498 ID) by submitting an FCC Form 498. In order to participate in the E-rate program, you must first have a SPIN and be registered with Sam.gov. You can obtain a copy of the FCC Form 498 Service Provider Identification Number (SPIN) Guide by going to our E-rate Training and Tools tab and clicking on USAC Resources. This guide will walk you through the process of obtaining a 498 ID/SPIN for your business. If you have any trouble with the application guide, there is an email address and phone number where you can receive assistance on page 3 of the guide.
2. **Sam.gov registration:** In order to submit requests for reimbursement for the E-rate program, you must be registered with Sam.gov. If you are not already registered with Sam.gov, you can do so by visiting <https://sam.gov/content/entity-registration> and click Get Started.
3. **E-rate Productivity Center:** When you register for a Service Provider Identification Number (SPIN), you will be granted access to the E-rate Productivity Center (EPC). EPC is the account and application management portal for the Schools and Libraries (E-Rate) program. E-Rate program participants use this tool to manage program processes, receive notifications and to contact customer service. This is also the tool you will use when searching for FCC Form 470's, looking for schools and libraries discount rates, as well as, building out your E-rate strategy each year. You can get to the E-rate Productivity Center (EPC) portal by clicking this link: <https://forms.universalservice.org/portal/login> and log in with your USAC credentials. We recommend that once you've setup your EPC account that you grant access to any of your sales teams so that they're able to utilize the portal as well.

4. TD SYNnex E-rate training videos: We have created a series of E-rate training videos to help you better understand and navigate the E-rate program. We have posted the videos in the E-rate Training and Tools tab under Training Videos. These videos are broken down into smaller episodes to make them easier to understand and to allow you to view them on your own schedule. We recommend that you watch all the training videos so that you have a better understanding and are better equipped to be successful in the program.
5. E-rate Application Process Flowchart: The E-rate Application Process Flowchart is the official E-rate flowchart of USAC. The application process is broken down in detail for both the Applicant and the Service Provider. This flowchart shows you what the Applicant is doing throughout the entire sales cycle and what you as a Service Provider will be doing during that same sales cycle. It's critical you understand the process in order to be successful in the E-rate program. You can find a copy of the E-rate Application Process Flowchart in our E-rate Training and Tools tab and clicking on USAC Resources. By studying the E-rate Application Process Flowchart and watching our Training Videos, you should gain a better understanding of the E-rate program.

Please stay tuned as there may be additional items listed on our checklist in the future.

For More Information

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