E-RATE RESOURCE CENTER

Reseller Readiness Checklist

A practical, step-by-step guide to help your organization prepare for E-Rate participation, access the right systems, and equip your sales team for customer conversations.

START WITH THE REQUIRED REGISTRATIONS

1

Obtain a Service Provider Identification Number (SPIN)

Service providers must obtain a SPIN, also called a service provider 498 ID, by submitting FCC Form 498. A SPIN is required to participate as an E-Rate service provider.

☐ Complete FCC Form 498 for your organization.

☐ Confirm your SPIN/498 ID is active.

☐ Save the SPIN guide and USAC support contacts for future reference.

RESOURCE: FCC Form 498 and SPIN guidance

2

Complete SAM.gov registration

Your organization must maintain an active SAM.gov registration to receive E-Rate reimbursement payments. Registration is free, but validation can take time, so begin early.

☐ Create or confirm your organization account.

☐ Complete entity registration and validation.

RESOURCE: SAM.gov entity registration

3

Set up access to the E-Rate Productivity Center (EPC)

After your SPIN is established, use EPC to manage E-Rate processes, receive notifications, contact customer service, search FCC Form 470 postings, and review school and library discount information.

☐ Log in with your USAC credentials.

☐ Confirm your company profile and contacts.

☐ Grant appropriate access to sales team members who will use EPC.

RESOURCE: E-Rate Productivity Center login

BUILD YOUR E-RATE KNOWLEDGE

Prepare Your Team for the Sales Cycle

LEARN THE PROCESS AND APPLY IT

4

Watch the TD SYNNEX E-Rate training videos

The TD SYNNEX E-Rate training series breaks the program into short, focused episodes you can view on your own schedule. Watch the full series to build a shared baseline across your team.

☐ Complete the training video series.

☐ Share relevant episodes with sales and operations teams.

☐ Capture questions for your next E-Rate planning discussion.

RESOURCE: Visit the TD SYNNEX E-Rate Resource Center

5

Review of the E-Rate Application Process Flowchart

The USAC flowchart maps the applicant and service-provider activities across the E-Rate cycle. Understanding both sides of the process helps your team anticipate milestones and support customers without directing their procurement decisions.

☐ Review applicant and service-provider responsibilities.

☐ Identify the milestones that affect quoting and fulfillment.

☐ Use the flowchart alongside the TD SYNNEX training videos.

RESOURCE: USAC E-Rate program resources

FINAL READINESS CHECK

Before pursuing E-Rate opportunities, confirm that:

☐ Your SPIN is active and tied to current organization information.

☐ Your SAM.gov registration is active and has a designated renewal owner.

☐ The right team members can access EPC.

☐ Your sales team understands the E-Rate timeline, competitive-bidding requirements, and customer roles.

NEED HELP?

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