

E-RATE COMPETITIVE BIDDING PORTAL

Rules & Regulations

FCC Order 26-30

⚠ KEY DATE: Beginning with FY2028 (beginning July 1, 2027), ALL Form 470 bidding documents MUST be uploaded to the Competitive Bidding Portal.

Required Uploads — FY2028 and Beyond

Service Providers Must Upload:

- Their bids submitted in response to Form 470s

Applicants Must Upload — All Communications During Bidding Process, PLUS (with Form 471):

- Bid evaluation criteria
- Completed bid evaluation worksheets or matrices
- Explanation for any disqualified bids
- List of people who evaluated bids (name, title/role, and relationship to applicant)
- Memos, board minutes, or similar documents related to vendor selection/award
- Copies of award notices
- Correspondence with bidders regarding products and services sought

Communication Rules While the Form 470 is Pending

From the date the Form 470 is filed until the contract is awarded, **the portal must be the means for all communications** — except where state or local law requires otherwise.

Communication Type	Guidelines	Upload Requirements
Vendor Questions	Must be submitted in the portal May be submitted anonymously or by name Applicants may set a deadline for receipt of questions	
Applicant Responses	Must be submitted in the portal Duplicate questions need not be answered	
<u>Meetings</u> <ul style="list-style-type: none">• Pre-Bid Conferences and Meetings / Site Walkthroughs• Post-Bid Meetings to discuss bids	May be held but must be documented	<i>Within 72 hours of the meeting:</i> Upload Q&A to the portal <i>By the time the Form 471 is filed:</i> Upload a meeting summary to the portal including date, time, bidder name(s), and general purpose of the meeting

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Accessing & Reviewing Bids in the Portal

Topic	Rule	Important Notes
User Access	Only the Account Administrator + up to 2 authorized users may access bids (consultants count)	Audit logs track who retrieves bids and when
Notifications	Applicants are notified immediately when a bid is uploaded	No mandatory waiting period is required before reviewing a bid
Bid Issues	Communicate with service providers inside the portal	Providers can communicate with applicants in the portal to modify bids to address any issues that may be identified and provide documentation of this communication

After the Form 470 Bid Deadline

Situation	Guidelines	Upload Requirements
No Bids Received	Applicants may request quotes/bids from providers	Upload solicitation and response to the portal to demonstrate how provider was selected
Using an Existing Vendor as Bid Response	Obtain email/documentation from current vendor confirming willingness to provide continued service	Upload confirmation and copy of current bill to the portal
Multi-Stage Procurements	Use the portal for each round of bids; Best & Final Offers must be conducted inside the portal	
Post-Bid Meetings	Applicants may meet vendors to discuss proposals	Upload a summary of each meeting to the portal by the time Form 471 is filed

Protecting Confidential Information

- Applicants may mark uploaded information as confidential — it will not be publicly available
- Meeting summaries related to bid review may be marked confidential
- Bids and pricing data submitted to the portal are treated as presumptively confidential
- Non-winning bids and pricing data will NOT be made routinely available for public inspection
- Applicants can require NDAs to protect confidential RFP or Form 470 information
- Applicants can require mandatory walkthroughs in their Form 470 or RFP

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Contract Documentation Requirements

Contract Type	Upload Requirements	Important Notes
Consortia Contracts	Consortium leader uploads competitive bidding & contract docs on behalf of all members	
New Multi-Year Contracts	Upload required competitive bidding and contract documentation in Year 1 Upload contract modifications in later years	
Existing Multi-Year Contracts (already active)	One-year grace period. Upload associated bids, bidding, and evaluation docs starting FY2029	Documentation previously provided to USAC does not need to be re-uploaded
State Master Contracts	Upload copy of state master contract and related bidding docs with Form 471	
Multi-Vendor State Master Contracts (Mini-Bids)	Mini-bids are conducted outside the portal (current procedures) Upload all mini-bid evaluation & selection docs plus copy of state master contract to the portal	

NOT Required in Portal:

- Contract negotiations
- Internal communications between bid evaluation team members

If Your Organization Uses a Different Bidding Portal

- Applicants and service providers may continue using existing state or local bidding portals where required by law
- Submitting bids or questions to a state/local portal does not violate E-Rate rules
- Include instructions about state/local requirements in your Form 470 or RFP
- Service providers MUST submit IDENTICAL bids in BOTH the state/local portal AND the Competitive Bidding Portal

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QUICK REFERENCE: Key Deadlines at a Glance

WHEN	WHAT YOU MUST DO
When Form 470 is filed	Begin using portal as primary communication channel
Within 72 hours of any meeting	Upload Q&A provided during pre-bid or review meetings
When filing Form 471	Upload all bid evaluation docs, meeting summaries, award notices, and correspondence
FY2029 (grace period)	Upload bidding docs for existing multi-year contracts already in effect
FY2028 (July 1, 2027)	Portal goes live — ALL new Form 470 bidding must use the portal