

## Summary of tasks needed to complete 2015 E-Rate filing cycle

### What the school does:

- School provides a completed **eRateProgram, LLC** Form 470 Information Sheet, with contact information for up to three people, including a primary contact who receives bids, proposals and inquiries from vendors who respond to Form 470 filing.
- School provides a copy of all current contracts with service providers, and one copy of an invoice from each current service provider.
- School chooses vendors in compliance with USAC bidding rules and notifies **eRateProgram, LLC** of costs, contract terms, etc.
- School provides one of the following to verify number of E-Rate eligible students:
  1. A copy of their October Reimbursement Claim Form for the National School Lunch Program.
  2. Documentation of number of low-income students enrolled, from third-party financial aid service or school records.
  3. Summary of results if family survey method used.
- School prepares an Internet Safety Plan or certifies they have an updated Internet Safety Policy adopted after 7/2/2011, in accordance with CIPA.
- Schools are required to retain receipt and delivery records relating to their technology plans, pre-bidding, bidding, contracts, application process, invoices, provision of services, and other matters relating to administration of USAC fund for a period of at least five years from last date of service.

### Documents Stored by the School

- Competitive Bidding, Vendor Evaluation & Contracts
- Children's Internet Protection Act (CIPA)
- Service Delivery & Inventory Management
- Invoicing & Payments

### What **eRateProgram, LLC** does:

- Reviews information received from School to ensure that all submissions are in compliance with the rules and regulations of the USAC E-Rate program.
- Identifies all current E-Rate eligible services for inclusion in school's filing.
- Helps school document the number of E-Rate eligible students using all approved methods, to maximize school's E-Rate discount level.
- **Prepares, files and certifies Form 470, describing eligible E-Rate services to be used by the School.**
- Provides school with standard procedures for choosing vendors in compliance with USAC bidding rules, based on Form 470 criteria.
- Receives school's agreements or contracts with all service providers chosen to supply services for 2014 school year, for inclusion on the School's Form 471.
- **Prepares, files and certifies Form 471 and multiple Item 21's requesting E-Rate funds for the school.**
- **eRateProgram, LLC** shepherds applications through all USAC/SLD/PIA reviews to assure compliance & approval.
- Receives Funding Commitment Decision Letters confirming approval of E-Rates, notifies school.
- Files Form 486, confirming to USAC and vendor the school will use the E-Rate funds requested.
- Receives Letter of Election from vendors, and facilitates vendors crediting funds to school.
- Manages all forms and files received from the school, and maintains files for ten years.

### Documents Stored by **eRateProgram, LLC**

- USAC Forms
- USAC Letters
- PIA Review
- Children's Internet Protection Act (CIPA)
- Change Requests and Appeals