

E-Rate Application Record

Record Keeping Checklist for E-Rate Application

Year _____ July 1, _____ to June 30, _____

*The following is a suggested checklist of information that should be retained for a minimum of **ten** years from the last date of service and should be maintained by YEAR of application.*

Name: _____

BEN: _____

Contact Person: _____

FCC Form 470 Description of Services Requested

Form Identifier: _____ Application #: _____ Date Submitted: _____

_____ Copy of the completed FCC Form 470

_____ Copy of RFP or any documentation that is used in place of an RFP

_____ Copy of all bids received or documentation that no bids were received

_____ Documentation of decision making process (including timeline) e.g. bid evaluation matrix

_____ Copy of any signed contracts

_____ Verification of FCC Form 470 receipt by USAC

_____ FCC Form 470 Receipt Notification Letter (RNL) from USAC

FCC Form 471 Description of Services Ordered

Form Identifier: _____ Application #: _____ Date Submitted: _____

_____ Copy of mechanism or spreadsheet used to calculate projected costs

_____ Copy of NSLP report or mechanism used to determine eligible students

_____ Copy of the completed FCC Form 471

_____ FCC Form 471 Receipt Acknowledge Letter (RAL) from USAC

_____ All correspondence and submitted documentation from PIA review

_____ Funding Commitment Decision Letter (FCDL) from USAC

FCC Form 486 Receipt of Service Confirmation Form

Form Identifier: _____ Application #: _____ Date Submitted: _____

_____ Copy of the completed FCC Form 486

_____ FCC Form 486 Notification Letter from USAC

FCC Form 498 Service Provider and Billed Entity Identification Number and General Contact Information Form

Form Identifier: _____ Application #: _____ Date Submitted: _____

_____ Copy of the completed FCC Form 498

FCC Form 472 BEAR Billed Entity Applicant Reimbursement

Form Identifier: _____ SLD Invoice #: _____ Date Submitted: _____

_____ (if applicable) Did not file a BEAR – Service Provider filed SPI

_____ Copy of completed FCC Form 472 BEAR(s)

_____ FCC Form 472 (BEAR) Notification Letter

_____ Copies of bills or purchase orders for services, invoices for payment, etc.

_____ Vouchers or canceled checks that were used in payment, etc.

_____ Documentation that proves that the actual discounts that were received for products and or services were correctly applied

_____ Inventory of tangible goods purchased with E-rate funds

_____ Documentation of E-Rate payments received

FCC Form 500 Adjustment to Funding Commitment

If you decide NOT to accept E-rate funds designated for your institution, you must submit a Form 500 to release the unspent funding. This allows USAC to disburse the funding to other applicants.

Form Identifier: _____ Application #: _____ Date Submitted: _____

_____ Copy of completed FCC Form 500 with signatures

_____ Verification of FCC Form 500 receipt by USAC

_____ FCC Form 500 Notification Letter

Children's Internet Protection Act (CIPA) Compliance

_____ Copy of Internet Safety Policy, notice to the public, and meeting minutes