

## Annual E-rate Checklist

### Pre-Form 470

- Letter of Agency (LOA) & Contract with Consultant, if any
- Proof that Technology Plan was written before Form 470 is filed
- Any amendments to Technology Plans (especially to add services/equipment posted in Form 470)

### Form 470 & Competitive Bidding Process

- Form 470
- Request for Proposals (RFPs)
- Correspondence with vendors during bidding process
- All proposals from vendors (winning *and* losing)
- Bid evaluation scoring process (or memo to file indicating no bids received)
- Correspondence with vendors during contract negotiation process
- Signed/dated contract
- Minutes of School Board where contract was discussed and approved. (if required by school policy)

### Form 471 & Post Commitment

- Form 471 and Item 21 attachments
- Documentation to support NSLP data submitted to PDE (enrollment and NSLP)
- District technology budget
- PIA correspondence
- Form 471 Approval Letter

### Form 486

- Form 486 and 486 Approval Letter
- Final technology plan
- Technology plan Approval Letter (dated before July 1)

### Form 472 BEARs

- Form 472 BEARs
- BEAR Approval Letters
- Copies of vendor invoices used in BEAR calculations
- Spreadsheet showing BEAR calculations (with ineligible amounts)  
*Not eligible: Late fees; finance charges; USF administration fees; paper statement fees; non-published number fees; directory listing and advertising fees; phones or fax lines to teachers, administrators or board members' homes.*
- Cancelled check for each vendor invoice
- Proof of receipt of BEAR reimbursement (deposit slips, bank statements)
- Invoice deadline extension requests & approval letters

### **Post Commitment**

- Service substitution letters
- SPIN change letters
- Equipment transfer letters
- E-rate-funded equipment inventory referencing:  
*Make, Model, Serial Number, Physical location, Date installed, FRN*
- Documentation related to billing disputes

### **General**

- Proof of professional development of technology
- Internet Safety Policy and minutes from school board meeting where it was adopted
- Invoices related to filtering product or service
- Records that to show filtering is in use
- Record Retention Policy
- Procurement Policy(ies)
- Proof that person signing E-rate forms has authority to do so
- If receiving discounted bills, proof of payment of non-discounted share to vendor
- Are you SURE you're receiving accurate discounted bills from vendor?
- Network diagram
- Packing slips and records to confirm date of receipt of E-rate equipment
- Copies of all vendor invoices for E-rate services/products