



## E-Rate Funding Year Record

Record Keeping Checklist for E-Rate

Funding 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