

E-rate forms, contents, filing sequence and 2010 funding timelines.

FORM 470: The first form describes E-rate eligible services * for which the applicant wants E-rate funding in 2010.

- By filing form 470 on Schools and Libraries (SLD) website (www.sl.universalservice.org), the school opens a 28-day period for vendors to bid on services that the school expects to use during 2009/2010 school year.
- During the 28-day open-bidding period, vendors will contact consultant, and then be referred to applicant.
- Consultant and applicants document all vendor contacts, whether referred to consultant or not, in E-rate file.

DEADLINE for filing a 2010 form 470 will be about January 10th, 2010, but should be filed As early as possible.

- At least 28 days after filing a form 470, applicant selects vendors for 2010, and can then file a form 471.

FORM 471: The second form is filed at least 28 days after the form 470. It shows the applicant name, enrollment, and the number of E-rate eligible (low-income) students. There are alternate approved methods of documenting the number and percentage of their “E-Rate Eligible” students, in addition to School Lunch.

- Each request for E-rate funds for an eligible service is given a separate **Funding Request Number (FRN)**.
- **Each FRN** is for 1 service from 1 service provider and describes the service or equipment, the Service Provider’s name and SPIN (Service Provider Identification Number), length of service agreement, and signed contracts for services supplied for more than 12 months. .
- **Each Equipment FRN** has a detailed description of parts and services supplied under the contract; with part numbers and detailed service descriptions. E-rate eligible and ineligible items should be listed separately.
- A contract (signed before the form 471 is filed) is required for agreements longer than 12 months,

DEADLINE for filing a form 471 for 2010 funding will be about February 11th, 2010. FILE EARLY!
(but be SURE to wait at LEAST 28 days after the form 470 deadline).

FORM 471 REVIEWS: Form 471 is reviewed for accuracy and completeness after Feb 2010. First-year filers usually are reviewed in more detail. Rapid, accurate responses are important to getting early approval.

FUNDING APPROVAL: Funding Commitment Decision Letters (**FCDLs**) are sent in weekly waves, beginning late spring 2010 and continuing into late spring 2011. **FCDLs** cover the 12 months 7/1/2010 through 6/30/2011, no matter when the **FCDL** is received.

FORM 486: This form confirms the applicant will use the requested services from the requested vendor. Must be filed within 120 days after the applicant receives their funding approval. By filing form 486 within 120 days after approval, applicants will receive E-rate funds for the full 2010 school year.

HOW E-RATE FUNDS ARE DISBURSED: applicant receives funds as discounts on monthly bills (BEST), or can pay bills in full for 12 months and file a **Billed Entity Application for Reimbursement** in July 2011. (not suggested) Each vendor must be told whether the applicant wants their E-Rate funds as monthly discounts or will be filing a BEAR form.

3-YEAR TECHNOLOGY PLAN: Applicants requesting services in addition to basic telephone service need an E-Rate approved 3-year Tech Plan covering 7/1/2010 – 9/30/2011 to receive funding. The Technology plan must be created before the applicant files their form 470. See our “Summary of E-Rate forms and process for 2010” on page 2.

* **Eligible Services** include **Local and Long Distance Phone bills, Cell Phone bills, Internet Access, e-mail accounts, Web hosting, Firewall and other Internet services, such as Edline, eChalk, School Center, School Wires, etc.** Schools with 75% or more Low Income families can also receive 90% E-Rate funds for voice and data wiring, phone and data networks, Distance Learning equipment, Wireless Access points and technology maintenance.

Summary of time spent to complete one E-Rate filing cycle using eRateProgram, LLC services

What School does - Time Spent

- Principal reviews cost/benefit analysis, hires eRateProgram, LLC, signs & mails agreements, and gives data form to Business Manager.
Total time spent - about **30 Minutes**
- Business Manager enters data on form and e-mails or FAXes it to eRateProgram, LLC.
Total time spent - about **30 minutes**

What eRateProgram, LLC does - Time Spent

- Reviews information from School
- Begins work with school on Technology Plan
- Identifies all E-Rate eligible services for inclusion in school's filing. .
- Identifies ways for school to optimize E-Rate discount rate, including documenting number of E-Rate eligible students.
- Prepares, files and certifies Form 470, describing eligible E-Rate services to be used by the school
- Creates Vendor Analysis Grid for bidders
- Receives, reviews and passes on vendor bids for decision by school, where applicable.
- Prepares, files and certifies Form 471 requesting E-Rate funds for the school.
- Deals with reviews of E-Rate filings to assure approval. (New filers are often reviewed).
- Receives Funding Commitment Decision Letters from Schools and Libraries and forwards copy to school.
- Files form 486, confirming the school will use E-Rate funds requested, makes corrections.
- Receives Letter of Election from vendors, and facilitate vendors crediting funds to school.
- Manages all forms and files associated with the application and maintains files for 5 years
- Total time spent = 20+ Hours

see our web site www.erateprogram.com or call us at 314-854-1328 for information about our services,