



E-rate Form 470 Preparation Checklist

Team Building

Build a team of people with the expertise you need. Different districts or organization have different titles. Some of the people needed for an E-Rate team include:

- District Business Officer (the person who knows about procurement, contracts, and bills)
- Information Technology Director (the person who understands the existing services and is aware of changes and upgrades)
- Curriculum Director (the person who proposes new programs running on the network)
- Superintendent (the person with signing authority)

Technology Plan

The technology plan for your school or district should be the starting point for any planning you may need to do in terms of technology infrastructure. District technology plans need to be approved by the school board and the County Office of Education. The technology plan for your district should align with requests on your Form 470 and your agreements listed on your Form 471 form.

- Technology Plan adopted _____
- Technology Plan approved _____
- Technology Plan expiration date _____

Resources: <http://www.cde.ca.gov/erate/>
<http://www.sl.universalservice.org/apply/step2.asp>

Calculate your discount (see worksheet Tab 4 in the Reference Binder)

How is the discount calculated?

- Poverty
<http://www.cde.ca.gov/demographics/files/afdc.htm> or <http://data1.cde.ca.gov/dataquest>. Both of the previous links count students served, which may be a low number of students. For ways to improve your district discount levels, visit <http://www.sl.universalservice.org/reference/alt.asp>.
- Location (urban or rural)
See <http://sl.universalservice.org/reference/msa/RuralUrbanClassYr4.asp> or visit <http://www.ffiec.gov/geocode/default.htm> to find your MSA number for the SLD site.

Do not assume that your urban or rural classification will be the same from year to year. Check this information each year you file.

- Document how you calculated your discount. Place in your E-rate file/binder.*

Decide on your strategy:

- Will you file online or on paper?



- ❑ Will you file a single Form 470 for everything, or separate forms for telecom, internet access, and internal connections?
- ❑ Will you apply for internal connections? (In past years, schools with discount levels below 85% did not receive funding for internal connections.)
- ❑ What services will you apply for?
- ❑ Will you apply for bundled service packages?
- ❑ If you are currently on the State of California Contract (CALNET) and are receiving E-rate discounts, will you file a 470 for any new products and services you may need in the coming year?
If you are not requesting any new products and services for the coming year, will you file a Form 470 for Funding Year 2003/Year 6? Or, will you choose instead to just file a Form 471 for Funding Year 2003/Year 6 for the services and products currently under contract and reference the Form 470 you filed the previous year(s)?
- ❑ If you have filed before, will you use the electronic signature option? If so, request a PIN at <http://sl.universalservice.org/reference/oscerts.asp>.
- ❑ Will you file for California Teleconnect Fund Discounts? See <http://www.cpuc.ca.gov/static/industry/telco/public+programs/cf.htm> for details.

Information you will need for the 470 form:

- ❑ Who will be responsible for questions about this e-rate application?
- ❑ Who will be responsible for questions about services being requested?
- ❑ Area codes and exchange codes of buildings receiving services
- ❑ Name of entity that pays the bill and the entity number (see <http://www.sl.universalservice.org/reference/entity.asp>) or, if your school or district is not listed, call the SLD Client Service Bureau at 1-888-203-8100)
- ❑ Any restriction you want to place on vendors reading your form 470. *These are only examples.*
 - CMAS vendors only
 - Geographic restrictions (must have a maintenance presence within 100 miles of your site)
- ❑ E-Rate Funding Year Timelines. *Don't miss a deadline!*
- ❑ Any contracts and agreements currently in place.
- ❑ Any terms and conditions you wish to stipulate in your Form 470
- ❑ Any procurement rules and options for your district
- ❑ What do you want to buy (reflective of your Technology Plan)?

Start your E-Rate documentation binder/file now. This may amount to a large amount of paper, so tabs are recommended for organization. While filling out the Form 470, print screens for documentation.