

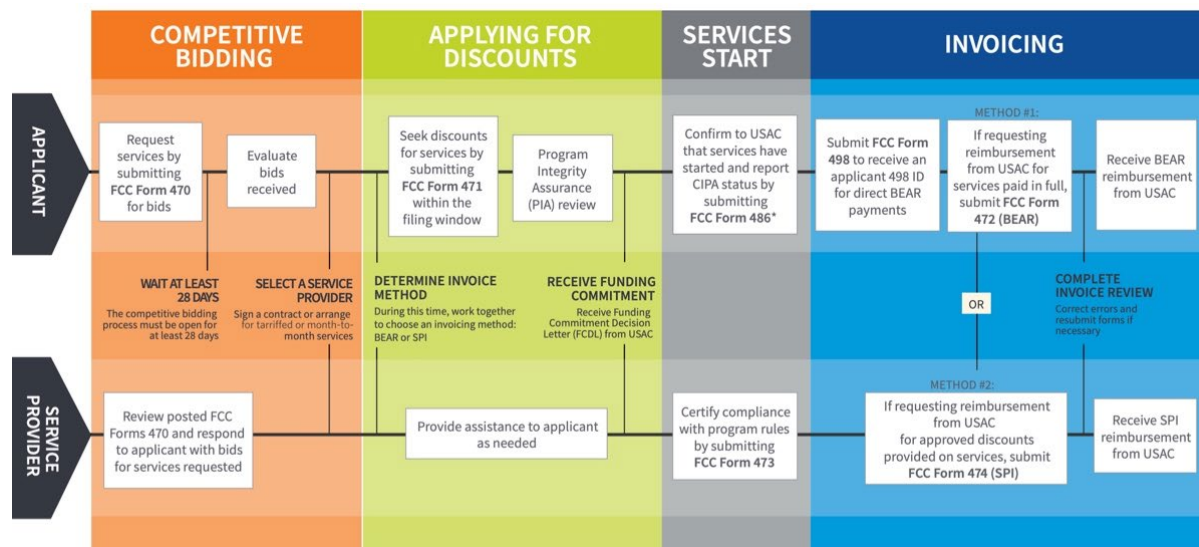
E-rate Forms, Process, Sales Cycle, Recommendations, and Compliance Reminders

The Universal Service Schools and Libraries Program, commonly referred to as E-rate, provides discounts to assist eligible schools and libraries to obtain affordable internet access and telecommunications services. This document highlights E-rate forms, process, sales cycle, recommendations, and compliance reminders.

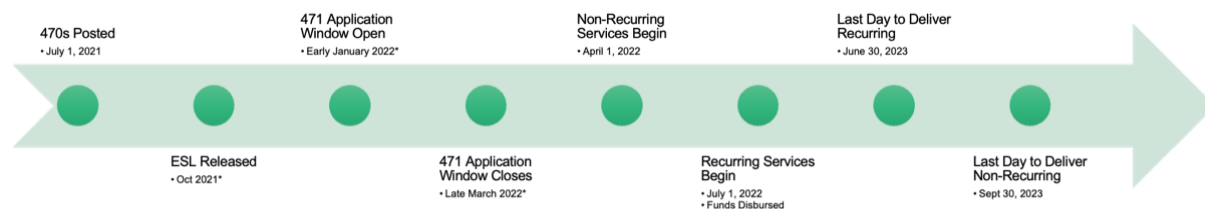
E-rate Forms

- **Form 498** = Service Provider and Billed Entity Identification Number and General Contact Information Form. Registering for a SPIN. First step in participating in the program as Service Provider.
- **Form 470** = Starts the process with the Applicant, the wish list, think of it as an RFP. The Form 470 must stay open for at least 28 days.
- **Form 471** = The Applicant (school/library) has now determined what they want to buy and who they want to work with.
- **Funding Commitment Decision Letter (FCDL)** = Letter from USAC approving or denying the funding and if approved, provides the levels of the discounts.
- **Form 486** = After everything is installed and up and running, the district certifies it.
- **Form 473** = Service Provider Annual Certification. Keeps your SPIN up to date.
- **Form 472** = BEAR - Submitted by the applicant to USAC after they have paid service providers for products/service in full.
- **Form 474** = Service Provider Invoice (SPI) - Submitted by the service provider to USAC requesting reimbursement for products/services already provided and not paid for by the end user.

E-rate Process, Sales Cycle, Recommendations and Compliance



E-rate Sales Cycle



E-rate Sales Cycle

File your FCC Form 473 Service Provider Annual Certification.	E-Rate is a year-round task, diligently monitor and communicate with your customer and keep records continuously throughout the year.
Maintain correct information on USAC site year-round.	Keep up with changes in the rules. The FCC can issue Orders, instructions and judgments at any time throughout the year.
Setup AND USE your E-rate Productivity Center account (EPC).	Carefully read all forms and check for errors. There are civil and criminal penalties for violating any certifications made by signing these forms.
Maintain any documentation or communication for 10 years past the last day of the funding year or the service delivery date (whichever is latter).	Strictly adhere to stated deadlines. There are exceptions, but don't take chances.
Include full details on all billing such as serial numbers, product descriptions, Form 471 Application Number.	Promptly and accurately respond to any inquiries from USAC.
DO NOT ASSIST YOUR CUSTOMER WITH THEIR FORM 470.	

Compliance Reminders

Under E-rate program rules, service providers cannot:

- Prepare all or part of an applicant's technology plan or Request for Proposal (RFP)
- Prepare, sign, submit, or post FCC Form 470 and/or FCC Form 470 certification
- Serve as the FCC Form 470 contact or have your contact information on the FCC Form 470
- Participate in the competitive bidding process except as a bidder
- Provide free services to ensure bid selection
- Give a charitable donation that is an inducement to purchase eligible services, reduces applicant's share, or serves to increase the demand for an existing donor's services
- Bundle eligible and ineligible products and services to hide the ineligible costs

- Waive or forgive the applicant's non-discount share of the costs for eligible services
- Set up a foundation that grants money for an applicant's non-discount share
- Urge applicants to submit a service certification with incorrect information
- Violate the E-rate gift regulations by providing a gift of \$20 or \$50 for the year for an individual

Must provide the Lowest Corresponding Price (LCP). LCP is defined as the lowest price that a service provider charges to nonresidential customers who are similarly situated to a particular applicant (school, library, or consortium) for similar services.

For More Information

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