



## *Tips from Learningtech: E-Rate Binder*

**All relevant documentation should be printed and filed in a separate E-Rate binder per funding year (e.g., “Year 12 E-Rate”).** It is likely that sooner or later, SLD will send a visitor to your school and ask to see your binder. There is an obligation to keep all documentation for FIVE YEARS after the last services have been received. The Miller Institute for Learning with Technology (aka "Learningtech") keeps an electronic backup of these materials, to help protect our clients from occasional mishaps; but ultimately, *the responsibility for document retention rests with the school applicant.*

**The most logical division of the paperwork is by SLD Form number,** with some subdivisions for documents that support these key forms. We recommend you create these binder tabs (color coding can be very helpful when trying to find something quickly):

- **Technology Plan**
  - CDE certification / Approval Letter
  - Annual E-Rate Supplement
  - Current Version
- **Admin**
  - CODES! – PIN, BENs, FCC RNs
  - LOAs
  - Discount Calculation (e.g., free/reduced lunch survey)
  - CIPA Compliance (filter reports printed on the first day of each calendar quarter)
- **Form 470**
  - RFP (if applicable)
  - RNL
- **Form 471**
  - Bids and Contracts
    - Bid Analysis
    - Selected
      - Service Provider #1
      - Service Provider #2
    - Rejected
      - Service Provider #3
      - Service Provider #4
  - Item 21 Attachments
  - RAL
- **FCDL**
- **Form 486**
- **Form 472/474**
- **Form 500** (if applicable)

This level of organization and completeness will make your life simpler. In the event of an SLD site visit, you will be well prepared well in advance.

Whenever you receive ANYTHING from SLD/USAC, please **fax** it to us IMMEDIATELY at **866 801-8667**.