Tips from Learningtech: E-Rate Compliance

Though E-rate application funding is never certain, properly prepared applications for high discount schools have excellent chances, especially when program rules are carefully followed.

Reasons for funding denial can include:

- Non-compliance, such as failure to conduct competitive bidding or to enter into signed and binding contracts prior to application for E-Rate funding
- Vendor misconduct, resulting in a vendor being disbarred from participation
- Minor technical errors in preparation of the actual applications (sometimes missing a single checkbox -- one which "resets" every time you visit a certain page on the application -- can result in denial of funding.

Even if approved, there are ways to later have funding reclaimed from you, such as using a server acquired with E-Rate funding to accomplish functions that are ineligible for E-Rate funding (using a DNS/DHCP server to also provide home directories for end users would be an example of ineligible server usage).

Part of our job as consultants is to help ensure that applicant personnel understand their obligations and best practices to ensure ongoing compliance with the program rules. Following is a list of compliance tips to help you successfully apply, get, keep, and effectively use E-Rate funding.

	File all your documentation in a binder and keep for five (5) years from last date to receive service.
	When you get equipment, **label** or **"tag"** it with the Funding Year and FRN, inventory it, and use it only for eligible purposes at the site for which it was purchased.
	Avoid signing contracts "out-of-window" without giving us a chance to offer feedback on any E-Rate implications.
	Whenever you receive ANYTHING from the SLD, **fax** it to us IMMEDIATELY at **866 801-8667.**
	If you are CALLED by the SLD, *always* refer the call to us; we have done the leg work and know the details
	Be careful not to incur non-recurring (one-time) costs prior to July 1, unless you have opted to pay for things directly yourself without the E-Rate discount.
	Don't start service until the later of July 1 and the FCDL (Funding Decision Commitment Letter), *unless* you are willing to risk paying 100%. Normally, still wait until July 1 to preserve the possibility of funding. However, there are times when you can start service sooner (e.g., you sign a five year phone service contract and it is cheaper than you have right now even without erate). *Always ask us if you aren't sure.*
	Become a cheerleader for getting all student families to fill out the National School Lunch Program (Free and Reduced Lunch) surveys. These may get you a higher E-Rate discount, and certainly will make SLD requests about them easy to answer later on.
	Be careful not to let a favorite service provider "write your tech plan," "help you prepare your Form 470," or undermine compliance with competitive bidding. Any of these could cause the loss of your funding!
	Remember to do the annual "E-Rate supplement" and/or complete any as-yet-uncertified tech plans by July 1. We're available to help.

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