

## E-RATE Checklist 2017-18

Use this list as a timeline and to keep up with upcoming assignments and forms due to KSLLC.

	ITEM	DUE DATE	COMPLETION DATE
	<b>START OF 2017-2018 PROCESS</b>		
<input type="checkbox"/>	KSLLC E-Rate Services Agreement, Scope of Work, Fee Schedule & Letters of Agency signed and returned.	July-August, 2016 Due No Later than August 31, 2016	
<input type="checkbox"/>	Last date for new clients to sign up for E-Rate consulting services with KSLLC.	December 1, 2016	
	<b>CHILDREN'S INTERNET PROTECTION ACT (CIPA)</b>		
<input type="checkbox"/>	CIPA Compliance-must discuss at public hearing or public board meeting any changes in Internet Acceptable Use policy and/or Internet filtering software. Must continue to educate minors about appropriate online behavior and document the training.	Must already be in compliance. Any changes require public notice – Board Meeting Qualifies	
<input type="checkbox"/>	Complete <a href="#">CIPA Certification</a> Form & send Internet filter invoice and screen shot annually.	July-August, 2016	
	<b>E-RATE TIMELINE</b>		
<input type="checkbox"/>	Update <a href="#">USAC EPC</a> (E-rate Productivity Center) account with any changes to users. Make sure your KSLLC Account Manager is a "full rights" user.	July-August, 2016	
<input type="checkbox"/>	Board authorization of Superintendent or other Administrator for E-Rate	July-August, 2016	
<input type="checkbox"/>	<a href="#">E-Rate Contact Form</a> : Indicate main E-Rate contact, AP, Tech contact, USAC forms 470/471 certifier.	July-August, 2016	
<input type="checkbox"/>	<b>Optional:</b> Distribute <a href="#">Family Household Income Surveys</a> - Record date surveys are received from each school site.	April-October, 2016	
<input type="checkbox"/>	RFP Questionnaire - Complete at <a href="#">erate470.com</a> .	September 2016-January, 2017	
<input type="checkbox"/>	USAC Form 470: Request for Proposal - KSLLC will prepare and submit Forms 470 & post RFP on <a href="#">EPC Portal</a> based in your completed RFP Questionnaire.	September-December, 2016	
<input type="checkbox"/>	<b>Certify USAC Form 470 on <a href="#">EPC portal</a> IMMEDIATELY once notified to begin minimum 28-day bidding period.</b>	September 2016-January, 2017	
<input type="checkbox"/>	Minimum 28-Day Competitive Bidding Period: Respond to service provider questions - fair and open competitive bidding period - publicly on KSLLC Q&A Forum <a href="#">erate470.com</a> . (No Contracts until 29 <sup>th</sup> day.)	September 2016-January, 2017	
<input type="checkbox"/>	Service Provider bids due - Bid due dates vary by posting date.	September, 2016-January, 2017	
<input type="checkbox"/>	Bid Decisions Due: Bid Evaluations & Signed Bids & Contracts - KSLLC will prepare your bid packet and email to you after bid closing. (Also uploaded to your <a href="#">KS Client Portal</a> ) Return completed bid selections, scoring sheets and signed Service Provider contracts within 14 days of receipt.	October 2016-January, 2017 As soon as you receive your packet, you need to ACT IMMEDIATELY to complete and return to your Account Manager	
<input type="checkbox"/>	Copies of Bills For Form 471 Application: SELECT BILLS FOR ALL ELIGIBLE RECURRING SERVICES-use the month most representative of charge. Upload to <a href="#">KS Client Portal</a>	November 18, 2016	
<input type="checkbox"/>	Student Enrollment and # of Students Eligible for Free/Reduced Lunch Program as of Oct 1 - Copies of Reports submitted to your state dept. of education. Also <a href="#">NSLP Certification Form</a> .	Due to KSLLC by 12/2/2016 or as soon as low income data is available.	

	ITEM	DUE DATE	COMPLETION DATE
<input type="checkbox"/>	<b>Optional:</b> <a href="#">Family Income Survey Results</a> - Tally surveys and submit to KSLLC no later than 12/2/2016. The Survey <i>may</i> increase Low Income %.	December 2, 2016	
<input type="checkbox"/>	Form 471 prepared with supporting documentation on <a href="#">USAC EPC portal</a> . KSLLC will notify you to review application and certify. Notify your Account Manager once 471 reviewed and certified.	January-March, 2017	
<input type="checkbox"/>	E-Rate Board Resolution - Present resolution to your board for approval. Return signed board resolution and copy of agenda & approved minutes when resolution was approved to your KSLLC Account Manager.	April-June, 2017	
<input type="checkbox"/>	Applicant copies of 2017-18 E-Rate Documents - KSLLC prepares a folder with copies of documentation related to your E-Rate filing. Sends set to applicant, uploads to <a href="#">KS Client Portal</a> .	April-June, 2017	
<input type="checkbox"/>	471 Receipt Acknowledgement Letter - KSLLC reviews RALs and submits any required corrections to USAC	March-April, 2017	
<input type="checkbox"/>	SLD Review (Program Integrity Assurance-PIA) – KSLLC will work with USAC to answer all questions regarding your application.	March 2017 and ongoing until funded	
	<b>POST FUNDING CORRESPONDENCE ON EPC</b>		
<input type="checkbox"/>	Funding Commitment Decision Letter (FCDL)	May-September, 2017	
<input type="checkbox"/>	FCDL Follow up Report-Category 1 services (Telecom & Internet) - Return completed follow up report for recurring services to KSLLC ASAP so we can set up discounts and reimbursement process. (BEAR or SPI). Alert us of any necessary service substitutions & SPIN changes.	May-September, 2017	
<input type="checkbox"/>	FCDL Follow Up Report-Category 2 services (Internal Connections) - Return completed follow up report for internal connection, MIBS & Basic Mtc. Alert us of any necessary service substitutions & SPIN changes.	May-September, 2017	
<input type="checkbox"/>	Form 486 on EPC portal. - Receipt of Services Confirmation – Filed by KSLLC after FCDL Follow Up Report instructions received (above)	Filed by KSLLC	
<input type="checkbox"/>	Copies of bills for reimbursement for services paid in full Upload copies of bills to <a href="#">KS Client Portal</a> portal.erate470.com. This includes monthly bills and one-time charges you paid in full. (FY 2016-17 bills) *Oct 2016: Send Jul-Sep 2016 Bills                      *April 2017: Send Jan-Mar 2017 Bills *Jan 2016: Send Oct-Dec 2016 Bills                   *July 2017: Send Apr-Jun 2017 Bills	<b>INVOICING DEADLINE 10/28/2017</b>	
<input type="checkbox"/>	Copies of Bills for REIMBURSEMENT - Category 2 - Internal Connections (FY 2016-17 bills) Not due until after funding and services installed. Send us COPIES of invoices when you pay in full and need us to file for reimbursement.	<b>INVOICING DEADLINE 1/28/2018</b>	
<input type="checkbox"/>	Form 472 - Billed Entity Applicant Reimbursement (BEAR) Form - KSLLC will send a copy for your files. Filed by KSLLC to request reimbursement for E-Rate discounts on services you paid in full.	<b>FY 2016 -17 Invoicing Deadline 10/28/2016</b>	
<input type="checkbox"/>	Form 500 - Filed by KSLLC to notify SLD of changes to your funding per your instructions: reductions, cancellations, contract expiration date extensions, equipment transfers and service delivery deadline extensions.	Filed by KSLLC	
	<b>OPTIONAL ACTIONS</b>		
<input type="checkbox"/>	SPIN Change - Corrective or Operational. If operational, must prove breach of contract or inability by original provider to complete the service AND can only change to 2nd provider on original bid evaluation. May be filed after FCDL issued.	<b>Due by last date to invoice.</b>	
<input type="checkbox"/>	Service Substitution Request - May be submitted if service/equipment will be different than originally funded. New service/equipment must have the same basic function as the original.	<b>DEADLINE: June 30 of the relevant funding year for recurring services, and September 30 that follows the close of the funding year for non-recurring services</b>	