Navigating the E-rate Modernization

Required Documents & Information Checklist

Please submit by December 12, 2014

Special Note: CNYRIC CONTRACTED SERVICES—*Eligible services contracted through CNYRIC are automatically included in the E-rate Consortium Applications. Please let us know of any potential plan to add/upgrade/change any eligible service in order for us to include it in the application. This includes increases to bandwidth, adding buildings to the fiber network, additional phone lines or PRI's.*

r   Free & Reduced Lunch Eligibility Report (*September Included with Email*)
District discount now based on total student NSLP eligibility versus student-weighted average of individual schools. Applies to both Category 1 and Category 2.

- *Determines discount rate and establishes Category 2 Budget*
- *Generally, September Report yields highest discount for participants*
- *Enrollment establishes five-year pre-discount budget for Category 2 at $150/student, i.e., total expense cap upon which any potential Category 2 reimbursement is based*
- *Please bring to my attention any subsequent report that increases discount rate or enrollment*

___ ACTION: *School superintendent or business official signs and dates "Comparison of Free/ Reduced Lunch Eligibles to Enrollment" report (anywhere on the sheet is fine); completed form should be emailed to rprell@cnyric.org.*

r   NEW! School Building Information Worksheet (*Included with Email*)
The former "Impact of E-rate Eligible Services" worksheet that had DOT's counting network drops and phone lines has been replaced by the "School Building Information Worksheet." Information collected will most likely be analyzed by the FCC, ultimately influencing policy.

- *School Building Physical Locations Determines Urban/Rural status of district*
- *Definition of "rural" changed to reflect census track data; designation selected automatically during on-line application process*

___ACTION: *FIRST, please note that the brief questionnaire pertains to SCHOOL buildings only. Next, please be sure to list the district name and your name at the top of page one. Please be sure to complete page two for any school building that serves the special populations listed in the space provided. If there are none, please write "NONE" to confirm. Completed form should be emailed to rprell@cnyric.org.*

r REVISED Technology Budget Summary Worksheet (*Included with Email*)
Estimated district resources beyond any E-rate funding that will be available to support technology initiatives. Used during the application process to certify that districts have funds budgeted to pay their share and aren't just counting on E-rate funds to cover the cost of technology initiatives.

- *NEW LINE ITEMS FOR 2015-2016 (We plan to populate these for you in subsequent years!)*
  - o *To simplify reporting, enter the total of your CNYRIC DISTRICT PURCHASED SERVICES in the space provided. You may use current year amounts where indicative of next year's estimated amounts.*
  - o *Enter the total of your CONSORTIUM E-RATE REIMBURSEMENT as a negative to exclude the amount supported by E-rate funding. Note: 2013-2014 Consortium Reimbursement Checks and Advice Letters are scheduled to be sent out November 21.*

  ___ACTION: *Complete the Technology Budget Summary Worksheet; email the Excel version to rprell@cnyric.org.*

r NEW! Wireless Voice Services Worksheet (*Included with Email*)
Information requested will be used to complete the Form 470 (Competitive Bidding) so that vendors may bid appropriately on the variety of Wireless Services participants seek. Please note that several features are no longer eligible for E-rate support under the E-rate Modernization Order, including data plans*, voice mail, text, messaging, custom calling services, directory assistance and email. Only basic wireless voice service is eligible and will be subject to the 20% phase down of voice service support.

*The "Data Plan Eligibility Test," included with email, was used recently by USAC to determine whether specific data plans were eligible for support.

___ACTION: *Complete the Wireless Voice Services Worksheet; email the Excel version to rprell@cnyric.org.*

r REVISED School District (Vendor Direct) Account Information (*LISTED IN EMAIL*)
Information is based on current year's application; funding requests will be updated at CNYRIC to highest eligible supported amount per invoices submitted by district.

___ACTION: *Please email a description of any new service, change to existing service, or potential change in service provider. NOTE: Changing Service Providers after the application process will [most likely] result in loss of E-rate funds for the funding year.*

r NEW! Category 2 Worksheet (*Included with Email*)
Information requested will be used to complete the Form 470 (Competitive Bidding) so that vendors may bid appropriately. Category Two products and services include eligible internal connections, managed internal broadband services, and basic maintenance of internal connections. Eligible products and services are included in the 2015-2016 Eligible Services List.

For more information, see "Guidance on Category 2" document.

___ACTION: *Complete the Category 2 Worksheet; email the Excel version to rprell@cnyric.org.*