

Form 471 Preparation

Please bring:

- 1) This year's Form 470 15-digit number;
- 2) A means for recording this year's Form 471 Application Number and Security Code;
- 3) Copies of any new contracts with their Signing Date, Start Date, Expiration Date, and Costs;
- 4) Last year's Form 471(s) with their Application Number(s) and Security Code(s);
(You can obtain copies of last year's Form 471(s) by going to <http://www.sl.universalservice.org/menu.asp>; and, in the *471 Column*, clicking on *Display*. Using only the Application Number and not the Security Code will display the full 471, but without the Certifier's information.)
- 5) The highest of recent bills for which you want a discount;
- 6) The type of service(s) and number of phone lines or subscribers associated with each bill; (To determine the number of lines, it may be necessary to contact the provider.)
- 7) For dedicated digital transmission lines such as T-1s, know what each line connects (Red School with Green School);
- 8) The amount budgeted for technology for next year. This number can come from your approved Tech Plan, or from your Business Office for all technology related expenses to be included in the Fiscal Year 2011 budget which are not dependent on grant applications.

You may also want to review the table on the following pages. It follows the e-Rate Form 471 line by line.

- The darkest shaded boxes are headings.
- The next darkest shaded boxes indicate information that is pre-populated.
- The lightest shaded boxes indicate information you need to verify or choices you have to make.
- The unshaded boxes indicate information you need to provide.

471 Item	Item Description	Your Entry	Comment
	Form Identifier		Use something meaningful to you, for example: F471_Dxxx_09_P1A for Form 471, District xxx, Funding Year 2009, first Priority 1 471 (A).
	Form 471 Application #		Record this information. Print to pdf
	Security Code		
Block 1: Billed Entity Information			
1 a	Name of Billed Entity		Pre-populated
2 a	Funding Year		Only one drop down available
3	BEN		Pre-populated
4 a	Street Address		Pre-populated. Verify that it is correct before proceeding.
	City		Pre-populated
	State		Pre-populated
	Zip Plus Four		Pre-populated
4 b	Tel. No.		Pre-populated
	Fax No.		Pre-populated
5 a	Type of Applic.		Select from given
6	Contact Person		Should be person completing the 471.
6 b	Street Address		Can opt to "Copy Down" if same as Billed Entity information.
	City		
	State		
	Zip Plus Four		
6 c	Tel. No.		Select preferred method of contact.
6 d	Fax No.		

6 e	e-Mail Address		Recommended method of contact.
6 f	Holiday Contact Information		The PIA Review may not occur until summer.
Block 2: Impact of Services on Schools		This information does not have to be exact. Audits have not sought to verify this information. Use last year's 471 as a guide.	
7 a	No. of Students	After order (July 1, 2009)	Estimate
7 b	No. of classrooms with phones	Before order: After order:	Estimate
7 c	No. of Dial-up Connections (up to 56 Kbps)	Before order: After order:	Estimate
7 d	No. of bldgs served at < 10 Mbps	Before order: After order:	Estimate
	10 Mbps < x < 200 Mbps	Before order: After order:	Estimate
	> 200 Mbps	Before order: After order:	Estimate
7 e	No. of drops to connect to the Internet	Before order: After order:	Estimate, e.g.: 5 per classroom times no. of classrooms
7 f	No. of classrooms with Internet Access	Before order: After order:	Estimate
7 g	No. of computers with Internet Access	Before order: After order:	Estimate

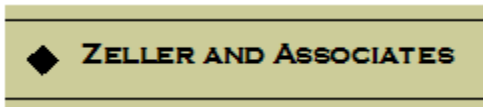
Block 3 is for Libraries			
Block 4: Discount Calculation Worksheets		<p>We recommend selecting the Option to copy Worksheet from previous year. You will need the Application Number and Security Code.</p> <p>PIA Review uses the ISBE spreadsheet available at http://www.isbe.state.il.us/nutrition/htmls/eligibility_listings.htm. It is recommended to use the same numbers</p>	
1	School Name		Use the same name as found on the SLD website.
2	Entity No(s).		<p>If unknown, at http://www.usac.org/sl/default.aspx, under <i>Search Tools</i>, use <i>Billed Entity Search</i>.</p> <p>Clicking on the BEN for the District will display all associated entities.</p>
	NCES Code		<p>If unknown, go to http://nces.ed.gov/CCD/districtsearch/</p> <p>Use Zip Code.</p>
3	Urban/Rural		Pre-populated, if using the Entity No.
4	Student Count		Pre-populated, if worksheet was copied.

5	NSLP Students		NSLP = National School Lunch Program which provides the district with the reimbursement for students eligible for Free and/or Reduced Lunches . Use ISBE numbers. Pre-populated, if worksheet was copied.
6	NSLP Students/Students		Pre-populated
7	Discount		Automatically calculated
8	Weighted Product		Automatically calculated
9	Pre-K/Adult/Juv		Pre-populated, if worksheet was copied.
10	Alt Disc Mech		Pre-populated, if worksheet was copied.
Block 5: Discount Funding Requests			
10	Original FRN		Special Case
11	Category of Service		If ICN user, all requests will most likely be "Telecommunications".
12	470 Applic. No.		Must complete. May use 470 Applic No. from previous year.
13	SPIN (Service Provider Identification No.)		From last year's 471, or Search on SLD website (<i>SPIN Contact Search</i>). You will need this number for each Service Provider.
14	Service Provider Name		Populates according to entered SPIN.

15 a	Tariffed or Month To Month		Landlines are usually tariffed. Cell phones are usually Month-to-Month. If under contract, leave blank.
15 b	Contract No.		You will need to supply the Number if it is a New Contract. Or, you may use the information from last year's 471.
15 c	Covered under Sate Master Contract		Priority 2: the Purchase of routers may be under a State Master Contract
15 d	FRN from Previous Year		Can use information from last year's 471.
16 a	Billing Account No.		Bring a copy of the highest recent bill for each account.
16 b	Multiple BANs?		Yes/No choice Some phone bills will be for more than one phone number (BTN).
17	Allowable Contract Date		Pre-populated according to the 470 No. entered previously.
18	Contract Award Date		Bring this information.
19 a	Service Start Date		Usually 07/01/2009
19 b	Service End Date		06/30/2010 for Tariffed and Month-to-Month Services. Blank for Contracts
20	Contract Expiration Date		Bring this information.

21	Attachment #		Recommend a naming convention such as: I21_09_621883_2515 where: I21 = Item 21 Attachment 09 = Funding Year 621883 = 471 Applic. No. 2515 = Identifying Nos. from BAN 708 447-2515
	Narrative Description		E.g.: Basic phone service for the District.
	Service Type		E.g.: Combined local and long distance service
	Description		Only if further description is necessary
	No. of lines		No. of phone lines, cell phone numbers, etc. It may be necessary to contact your Service Provider to get this information.
22	Block 4 Entity No.		Usually the District BEN
23 a	Monthly recurring charges		From your invoices.
23 b	Ineligible monthly amount(s)		From your invoices.
23 c	Eligible monthly amt.		Automatically calculated
23 d	No. of months of service		Usually 12
23 e	Annual pre-discount		Automatically calculated

23 f			Automatically calculated
23 g			Automatically calculated
23 h			Automatically calculated
23 i			Automatically calculated
23 j			Automatically calculated
23 k			Automatically calculated
Block 6: Certifications and Signature			
25 a	Total pre-discount amt on 471		Automatically calculated
25 b	Total Discount requested		Automatically calculated
25 c	Total non-disc amt		Automatically calculated
25 d	Total Budget Amt Allocated		This number can come from your approved Tech Plan, or from your Business Office for all technology related expenses to be included in the Fiscal Year 2011 budget which are not dependent on grant applications.



V: 847.828.4606
 F: 847.729.6718
 E: gzeller@zellerandassociates.com