Schools & Libraries - Application Do's and Don'ts

APPLICANT CHECKLIST

Pre-Application Process
- ☑ **DO** update your contact information with the Client Service Bureau (1-888-203-8100).
- ☑ **DO** make sure your technology plan covers the complete upcoming funding year.
- ☑ **DO** verify that your technology plan has the 5 required elements: Goals, Professional Development, Needs Assessment, Budget, and Evaluation Process.
- ☑ **DO** create or write your technology plan before filing the Form 470.
- ☑ **DO** have a USAC-certified technology plan approver certify your technology plan before services start.

Form 470 and Competitive Bidding
- ☑ **DO** list your requested services on your Form 470 — and your RFP if you have one.
- ☑ **DO** list your requested services in the correct categories of service (Telecommunications, Internet Access, Internal Connections, or Basic Maintenance of Internal Connections).
- ☑ **DO** mark the correct boxes in Block 2 for multi-year contracts and/or voluntary extensions.
- ☑ **DO** certify your Form 470 prior to the close of the Form 471 application window.
- ☑ **DO** ensure a fair and open competitive bidding process. All service providers must be treated equally and cannot be given biased or privileged knowledge of the bid.
- ☑ **DO** select the most cost-effective service provider, with price as the primary factor.
- ☑ **DO** keep ALL records relating to the bid evaluation process (correspondence with potential vendors, winning and losing bids, worksheets, evaluation criteria, contract, etc.). Note in a memo if one (or no) bids are received.
- ☑ **DO** remember that contracts must be signed and dated by the applicant before filing the Form 471. The service provider signature and date area not a program requirement.
- ☑ **DON'T** sign a contract until after the Form 470 has been posted for 28 days.
- ☑ **DON'T** allow a service provider that may bid on your services to fill out your Form 470.
- ☑ **DON'T** wait until the Form 471 window opens to file your Form 470.

Form 471
- ☑ **DO** verify that services ordered match the category requested on the correct Form 470.
- ☑ **DO** file separate Form 471 applications for Priority 1 services and Priority 2 services.
- ☑ **DO** read the Eligible Services List and request discounts only on eligible services.
- ☑ **DO** complete your Item 21 Attachment and include the pre-discount prices of the services.
- ☑ **DO** split out requests of questionable eligibility into separate Funding Request Numbers (FRNs).
- ☑ **DO** check your math. The Form 471 and the Item 21 attachment totals should match.
- ☑ **DO** file electronically and **DO** certify online before the close of the window.
- ☑ **DO** keep a record of postmark or electronic submission.

For additional information, please use the USAC resources listed below:

Technology Plan Approvers:	http://www.usac.org/sl/tools/reference/tech/default.asp
Form 470 Questions:	http://usac.org/sl/applicants/step03/form470-filing-information.aspx
Calculating Discount Levels:	http://www.usac.org/sl/applicants/step05
Form 471 Questions:	http://www.usac.org/sl/applicants/step07