

# E-Rate Newsletter for MI Libraries

E-rate News, Tips and Tricks

July 23, 2009

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Now that it's Summertime it is time to prepare and submit your BEAR forms for Funding Year 2008 (bills from July 2008 through June 2009).

It is not too early to start preparing for next year's E-rate filing.

We are here to answer any questions about E-rate. Just call the E-rate Hotline at 888-307-6569.



## BEAR Forms also known as Form 472

It is time to file your BEAR forms for FY2008 if you have not already done so. The last day to file a BEAR form is October 28, 2009. If you can't complete by then, you can file an "Invoice Deadline Extension Request" online. It is best to get ahead of the deadline because then you are assured of more timely delivery of your check(s).

Gather all of your bills from July 2008 through June 2009. Read through your bills so that you are only claiming eligible items. For example, late fees and administrative charges (and there are other charges) are ineligible items and must be excluded. Prepare a spreadsheet so that you can document how you derived your numbers. After you have filed your BEAR form(s), keep the forms and the backup spreadsheet in your E-rate binder.

## E-rate Binder - The New Year

We have been featuring the detailed sections of the E-Rate Binder here. In their recent Newsletter the SLD stressed the use of the binder format in preparing for audits. Now is the time to re-check and update your FY2009 Binder and also to create your Binder for Funding Year 2010.

### Tips for a complete Binder:

- Create and maintain your Binder in both paper and electronic format.
- Scan all documents to electronic format if possible - including bid responses, SLD letters and budget documents.
- Auditors and PIA reviewers will accept all major file formats but the most common are Adobe (PDF) and MS Word (DOC).
- Retain copies of all communications between you and the SLD, especially email correspondence with your PIA reviewer.
- Retain 'snapshots' of source data for NSLP (free and reduced) discounts, annual budgets and other information that originates outside of your direct control.

You can download the PDF version of the Binder's [Table of Contents](#) from the SLD's Reference Area on their website. Remember that an up-to-date E-Rate Binder for each funding year is your best tool for demonstrating compliance.

### Service Provider Contracts

In the E-Rate world the time to sign contracts is a minimum of 28 days after the Form 470 has been submitted. Then the Form 471 can be submitted. To that end it would be wise to review what contracts are coming up for renewal now. The contracts for FY2010 must cover the months of July 2010 through June 2011. If they do not, then you must consider if you want that service or equipment to be designated as a tariffed item, a month-to-month item or to negotiate another contract.

Depending upon what your library board, local municipality or state government require in the procurement process, you may or may not need to create and publish a Request for Proposal (RFP) to obtain a new contract. It is good to research these requirements now so that you will be ready with updated contracts when filing the Form 470 later during September 2009 through January 2010.

### Late Approval of Tech Plans

The SLD requires that your Technology Plan be in force (approved) for the entire funding year. If your Technology Plan was only approved for part of the year, you may have to reduce your amount of eligible funding. For instance if your existing Technology Plan expired on July 1 and you did not receive approval for a new plan until October 1, then only the services received after October 1 would be eligible, even though you may be approved for the full year. For recurring services this means that your monthly bills from July, August and September would not be eligible. Call our helpline if you have questions.

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