

# E-Rate Filing Checklist for K-12 Districts

A field checklist for aligning your Apple deployment with the E-Rate funding year.

## 12 Months Before Funding Year

Confirm your district's Discount Rate and BEAR vs SPI election with the business office.

Inventory current Category 1 (broadband) and Category 2 (internal connections) services.

Build a five-year Category 2 budget map showing remaining budget per school site.

## Form 470 — Open Bidding

Post your 470 in the EPC portal at least 28 days before signing any contract.

Describe services in functional terms — avoid brand-specific language unless justified.

Identify Category 1 vs Category 2 line items clearly; pair iPad / Mac refreshes with Category 2 Wi-Fi or switch refreshes in the same cycle.

## Vendor Evaluation

Score bids on cost-effectiveness as the primary factor (most-heavily-weighted criterion).

Document evaluation matrix and board approval if required by your district's policy.

Confirm vendor is on the SAM.gov registry and has a valid SPIN number with USAC.

## Form 471 — Funding Request

File within the application window (typically January through late winter).

Attach signed contracts and a complete item list with FRN-level detail.

Cross-check Category 2 budget remaining per site before locking in equipment counts.

## Post-Commitment

Receive Funding Commitment Decision Letter (FCDL); review carefully and appeal within 60 days if needed.

File Form 486 within 120 days of service start to certify CIPA compliance.

Submit BEAR (Form 472) invoices as services are delivered; track against the funding year deadline.

## NLE Systems Support

Itemized quotes mapped to Category 1 vs Category 2 line items.

SPIN, SAM.gov, and authorized reseller documentation available on request.

Pre-bid meetings and reference architectures for Apple + network refresh cycles.

Prepared by NLE Systems — Authorized Apple Reseller for K-12 Education. Contact [ac@nlesystems.com](mailto:ac@nlesystems.com) for tailored guidance for your district.