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Schools and Libraries News Brief

January 11, 2008

FY2008 WINDOW COUNTDOWN	
Days to window close	27
Forms 470 posted on/before Jan. 10	30,586
Forms 471 filed to date	3,904

TIP OF THE WEEK: Check now to make sure you have the PIN you will use to file your Form 471 online. If you think you have a PIN but cannot locate it, call the Client Service Bureau at 1-888-203-8100 and ask them to regenerate your PIN and mail it to you.

Commitments for Funding Year 2007

Funding Year 2007. USAC will release FY2007 Wave 34 Funding Commitment Decision Letters (FCDLs) January 16. This wave will include commitments for approved Internal Connections and Basic Maintenance requests at 83% and above and denials at 79% and below. As of January 11, FY2007 commitments total just under $1.79 billion.

On the day after the FCDLs are mailed, you can check to see if you have a commitment by using USAC's Automated Search of Commitments tool.

Application Process: Form 471

In the January 4, 2008 News Brief, we introduced the Form 471 and covered the materials you should have on hand before your start this form. We continue to recommend that you file online instead of on paper. This week we will look at the Form 471 block by block and below we give you additional guidance on completing the form.

Here are some of the reasons to file online:

- During the online filing process, helpful pop-ups, reminders, and warning messages often appear if you enter incorrect or inconsistent data. (Remember to disable pop-up blockers in your browser before you start.) In some cases you can continue in spite of a reminder or warning; in others you will have to resolve the problem before you can continue.
- Certain information populates automatically, can be copied, or is calculated from other data you provide, reducing the possibility of errors.
- If you cannot complete your application in one session, you can save your work, exit, and continue later. (Remember to save your application number and security code.)
- The information on your form is available to USAC as soon as your form is submitted and certified. You do not have to wait for the data entry and problem resolution processes that take place with paper forms to be completed.

Even though the built-in checks reduce the possibility of errors when you file online, you should still review your form carefully before you submit it. If you find later that you have made a mistake, you can usually correct it by using the Form 471 Receipt Acknowledgment Letter (RAL) correction process or by informing your Program Integrity Assurance (PIA) reviewer.

Block 1: Billed Entity Information

In Block 1, when you locate your Billed Entity Number online, the system will complete the information in Items 1, 4, and 5 from information already in the USAC database. As we said in last week's News Brief, if the information is incorrect you must change it in advance of filing the form. Make sure you enter current contact information for the contact person in Items 6a – 6e, as PIA will use that information to contact you during the review of your application. We also suggest that you provide holiday/summer/vacation contact information in Item 6f if you have it so that the review of your application can continue if your school or library is closed or your primary contact person is on vacation.

Block 2: Impact of Services Ordered on Schools

If your Form 471 funding requests include schools, you provide information in this block on the numbers of students and classrooms served and the speed of services both before and after they are ordered. This information is helpful for the PIA review process.

Block 3: Impact of Services Ordered on Libraries

Similarly, if your Form 471 funding requests include libraries, you provide information in this block on the numbers of library patrons and library rooms served and the speed of services both before and after the services are ordered.

Block 4: Discount Calculation Worksheets

In this block, you identify all of the individual recipients of service (entities) for the funding requests you will complete in Block 5. If a service will be provided to only one entity (what we call a site-specific service), you can identify that entity by its entity number. If a service is shared by a number of entities, you must complete a worksheet for each group of entities that share a service and identify that group by its worksheet number. (The entity number or worksheet number is entered in Block 5 Item 22.)

If you intend to ask for discounts for entities that do not yet have entity numbers, the Client Service Bureau can assist you to create entity numbers. To create or update entity information, follow the guidance in last week's News Brief. Besides the entity name and number, it is important to have the additional information requested for recipients of service in order to complete Block 4.

Block 5: Discount Funding Requests

This block is the location of the detailed information for each of your funding requests. On each request, you will identify the category of service, the service provider, and information on any contracts. You will also provide specific cost information, including:

- Monthly costs (recurring services)
- Ineligible monthly costs (recurring services)
- Number of months of service (recurring services)
- Annual or one-time costs (non-recurring services)
- Ineligible annual or one-time costs (non-recurring services)
- Discount (from Block 4 worksheet)

Note that it is possible to have entries for both recurring and non-recurring costs in the same funding request. For example, you could request discounts on the installation of a telephone line (non-recurring costs) and 12 months of telephone service on that line (recurring costs).

Block 6: Certifications and Signature

In this block you certify your compliance with and understanding of program rules. Read this information carefully to be sure you can accurately make all of the certifications.

After you have submitted your form, you can certify it online if USAC has issued you a PIN. If you do not have a PIN, you can print out the certification page, sign it, and mail it to USAC. (We recommend that you print this page while you are still online to reduce the possibility of errors.)

For more information on completing the Form 471, refer to the [Form 471](#) and [Form 471 Instructions](#).

Libraries: Check Your Discounts if You Use the Form 471 Copy Block 4 Function

Beginning with FY2003, the method libraries use to calculate their discounts changed. However, applicants that used the "Copy Block 4" function on the online Form 471 to copy a worksheet from a previous funding year may have preserved an incorrect discount and then carried it over to later funding years.

Library outlets and branches on Block 4 worksheets should feature only matrix discounts – that is to say, discounts that appear in the [Discount Matrix](#) (20%, 25%, 40%, 50%, 60%, 70%, 80%, or 90%). These discounts result from the library calculation of the SIMPLE average discount for the school district in which the outlet or branch is located.

- Before FY2003, a library outlet or branch used the **WEIGHTED** average discount for the appropriate school district. School district calculations give more weight to the discounts of individual schools in the district with more students and less weight to the discounts of schools with fewer students. Consequently, the resulting discount for the school district is often a non-matrix discount – that is, a discount like 82% or 67% that does not appear in the Discount Matrix.

When an applicant uses the Copy Block 4 worksheet function online, the discount information in that worksheet is preserved unchanged. Unless the applicant goes into the entry for each individual library outlet or branch in the new worksheet and makes a change, a non-matrix discount from a previous funding year will remain. If a Copy Block 4 function was used every funding year starting with FY2003 and never reviewed by the applicant, the non-matrix discount may still appear for FY2008.

We are asking applicants to check the discounts for library outlets/branches in their spreadsheets to verify that only matrix discounts appear. In many cases, recalculating the library discount using the current methodology will result in a higher discount for the library.

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