

INSTALLATION CHECKLIST

START

FCC Form 471: Request discounts on eligible services and equipment for the upcoming funding year and receive a funding commitment from USAC.

The equipment purchased (with E-rate funds) has been delivered.

Don't just put your equipment away and **forget about it.** Work with your service provider to ensure it is installed and functioning. Document the process!



FCC FORM 500

Request Extension: If you are unable to install the equipment by Sept. 30, you must file FCC Form 500 to request an additional 12 months for installation.



Equipment must be installed by the September 30 deadline, following the close of the funding year on June 30 (unless you receive an extension).

IMPORTANT REMINDER

If the equipment is not installed by Sept. 30, and you do not have an extension, **USAC may recover funds.**



The equipment has been installed by the Sept. 30 deadline.

FINISH



EQUIPMENT TRANSFER GUIDELINE



Installed equipment funded by E-rate should only serve the entities approved on the FCC Form 471 Funding Request Number (FRN). **Be sure to follow all FCC rules when transferring equipment.**

Equipment can be transferred to other **eligible entities** under two circumstances:

- 1** The location has temporarily or permanently closed within three years of the date of equipment purchase **OR**
- 2** Three or more years have passed since the equipment purchase date.

Note: You are no longer required to report equipment transfers that occur on or after July 1, 2021.



IMPORTANT REMINDER

All applicants are required to **maintain asset and inventory records** of equipment purchased and the **actual locations** of such equipment for a period of **10 years after purchase**. Applicants must also maintain detailed records **documenting the transfer of equipment** and the **reason for the transfer for a period of five years**.

See next page for information to include in your detailed records.

DETAILED RECORDS TO MAINTAIN FOR EQUIPMENT TRANSFERS AND FIXED ASSET LISTINGS



Equipment Manufacturer and Model

Example: ABC Electronics Transceiver XDF-2950.

Business Reason and FCC Form 500 that Supports Transfer

Example: "School closed; see FCC Form 500 No. 283415 filed with USAC on April 17, 2020."



Equipment Serial Number

Operating Status of Funded Equipment

Example: "installed and functional," "returned to manufacturer for repair," etc.



Quantity Installed

Console Report or Ping Report

To show location in school where equipment is installed.



Entity Where Funded Equipment is Installed

Example: Lincoln Middle School.

Copy of Regular Inventory Audit Performed by Your Entity



Location in Entity where Equipment is Installed

Example: East Wing Server Room.

Proof the New Location Can House Equipment

Example: the location is climate controlled and structurally sound.



Date of Installation or Transfer

Proof of Changes to or Dispositions of Equipment

Examples, "returned for repair" documentation or a charity donation receipt (5+ years after installation).

