



E-RATE DOCUMENT RETENTION

The purpose of this policy is to ensure that the Aberdeen School district complies with E-rate requirements to obtain federal funds for discounted telecommunications and internet services.

Document Retention Policy:

- SDCL requires at least 5 year retention for all records related to the e-rate applications for discount services. The 5 year begins after the last day of service delivered for a particular year. If an extension is granted the retention is increased for the extension period.
- Records will be kept in a binder or filing system (or combination of both) housing documents or location if stored in a separate area (such as the Business Office) to ensure that the Aberdeen School District complies with program rules and to protect the District in the event of disputes.
- Good record keeping is essential.
- Keep copies of everything.

Types of records to retain or document location include but are not limited to:

- Competitive bid documents: RFPs, bids, quotes, proposals, documents describing bid evaluation criteria (including weighing), bid evaluation worksheets, bids submitted (winning and losing) other documents related to the selection of service providers as it relates to telecommunication and internet services.
- Asset or inventory listing
- USAC Forms
- USAC Letters
- Technology Plan & Approval letter
- PIA Review
- CIPA (Children's Internet Protection Act) Policy
 - Filtering Documentation
 - Internet Safety policy
- Change Requests & Appeals
- Network Diagrams
- Service Agreements
- Financial statement and annual budget
- Payment of the undiscounted portion
- Inventory of purchased hardware including locations of equipment and serial numbers
- Signed contracts, amendments, addendums to the contracts, and purchase orders
- Service provider bills to customers
 - Detail of vendor/services/products and locations
 - Indicate entity(ies) receiving services/products
 - Delivery/installation dates
- Documents relied upon to submit the form 471, including National School Lunch Program eligibility documentation supporting the discount percentage
- Documents used to prepare the Item 21 description of services attachment
- Applicant payments
 - Cancelled checks
 - Service credits for any reason

Policy Suspension

If the District does not apply for E-rate funding, a document stating the reason that the application was not submitted or that the district was turned down for e-rate funding shall be placed in the E-rate document retention binder or filing system.

ADOPTED: February 9, 2009

REVISED: January 27, 2014

REVIEWED: December 10, 2018