

# E-rate Form 472 “BEAR” Reimbursement Filing Guide



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[www.e-ratepa.org](http://www.e-ratepa.org)

# Purpose of the Form 472 “BEAR”

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- If an applicant has not received discounted vendor invoices, they must file the Form 472 “BEAR” to seek reimbursement form from USAC for the E-rate eligible amount
  - If the applicant received discounted bills, no BEAR form can be filed and vendor submits the SPI Form (Service Provider Invoice) to USAC
- The BEAR provides USAC with the total amount of E-rate eligible funding spent for an FRN and the system calculates reimbursement amount
  - Cannot be reimbursed more than your funding commitment cap
  - Can only be reimbursed for the eligible amount spent, multiplied by the approved discount
  - Cannot submit a request up to your cap if you didn't spend that much
- BEARs for recurring services can be submitted monthly, quarterly, semi-annually or annually
  - Most applicants submit a single BEAR after the funding year has ended
- BEARs for equipment or one-time services can be submitted after the equipment is received and paid for (or services have been rendered)
- A BEAR must be submitted for each different SPIN
  - Two FRNs with the same SPIN can be submitted on the same BEAR

# BEAR Deadlines

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- BEARs are due within 120 days from the last day to receive service
  - Recurring Services = October 28, 2016 (for FY 2015)
  - Non-Recurring Services = January 28, 2016 (for FY 2015)
- If the BEAR cannot be submitted by this date, the applicant must submit an Invoice Deadline Extension Request (IDER) to USAC by the invoice deadline
  - One, 120-day extension will automatically be granted
  - No further extensions can be granted
  - FCC has never approved a late-submitted invoice or IDER request

# What's New for FY 2015 BEARs?

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- BEARs must be filed using the legacy BEAR system
  - They are NOT filed in EPC
  - File at: <https://www2.sl.universalservice.org/bear/login.aspx>
  - Can no longer file paper BEARs
- Must use the old E-rate PIN to access online BEAR
  - If you don't have a PIN or can't find it, call USAC at 888-203-8100
- BEARs are no longer approved by vendors
- All E-rate BEAR reimbursements will be sent via Direct Deposit directly to the school or library's bank account
  - This includes FY 2015
- Applicants must have a USAC-approved Form 498 prior to filing the BEAR
  - Form 498 identifies the bank and account information where the BEAR reimbursements should be electronically deposited
- Reimbursement payments do not flow through the vendor – they are electronically transferred from USAC to the applicant

# What is the Form 498?

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- It's a simple form to complete, but must be approved by USAC before any BEARs can be submitted to USAC
- Must be submitted by “school or library official” (no consultants)
- In EPC: Name of Entity > Related Actions > Create FCC Form 498
  - If 498 isn't showing as an option, go to Manager User Permissions to ensure that you are designated as a “school or library official”
- Information you'll need to complete the 498:
- Name of General Financial Contact (must be an EPC user)
- Name of Remittance Contact
- Name of Bank
- School or Library's Federal EIN Number
- DUN and Bradstreet Number (DUNS)
  - Look-up tool available
- Financial Institution Account Number for ACH
- ACH Financial Institution Transit Number

# Form 498 Processing/Approvals

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- After the 498 is submitted, USAC will e-mail the General Financial Contact (GFC) with a link where you must upload one of the following documents to validate the banking information that was included on the 498:
  - A clear image of a voided check, or
  - A statement from your financial institution that includes the bank name and your account number
- The link is:  
<http://efileweb.usac.org/ContributorManagement/V1/BankValidation>
- USAC will then e-mail the GFC with a Form 498 Approval Notice
- Form 472 BEAR may *then* be submitted to USAC

# Let's File a Form 472 BEAR

Go to: <https://www2.sl.universalservice.org/bear/login.aspx>

**USAC**  
Universal Service Administrative Company  
*Helping Keep Americans Connected*

Need Help?

**Applicant Login:**

BEN:

PIN:

Email:

Last Name:

Login

[Terms and Conditions of PIN Usage](#)

Enter Billed Entity Number

Enter E-rate PIN

Enter E-mail Address of PIN User

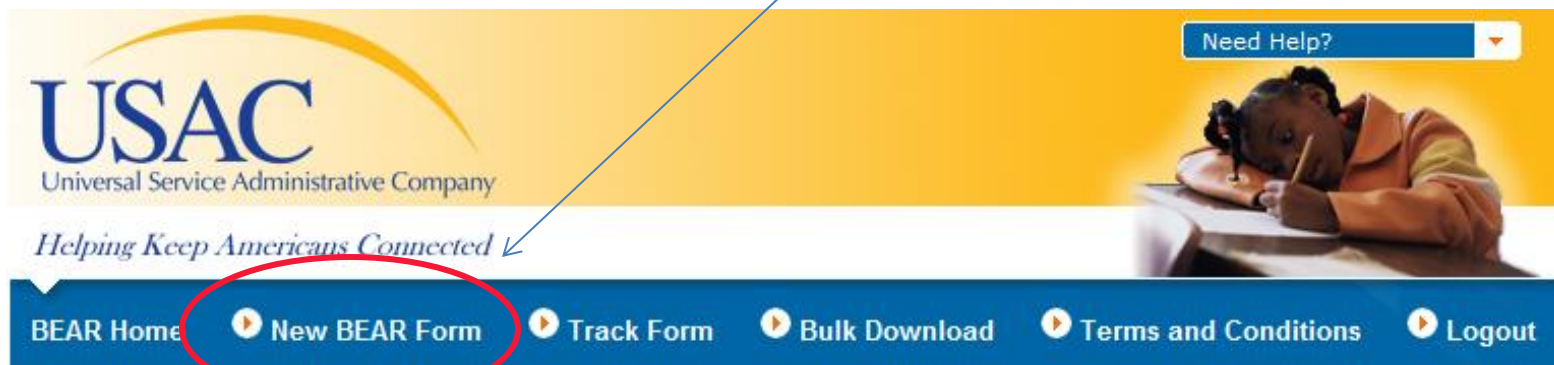
Enter Last Name of PIN User

Call 888-203-8100 if PIN doesn't work, if you can't remember the PIN, or need a PIN

# How to Start a BEAR

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Select "New BEAR Form"



The screenshot shows the top navigation bar of the USAC Billed Entity Applicant Home Page. The bar is dark blue with white text and icons. The navigation items are: "BEAR Home", "New BEAR Form", "Track Form", "Bulk Download", "Terms and Conditions", and "Logout". The "New BEAR Form" item is circled in red. A red box with the text "Select 'New BEAR Form'" is positioned above the navigation bar, with a blue arrow pointing to the "New BEAR Form" item. In the top right corner of the page, there is a "Need Help?" dropdown menu. The background of the page features the USAC logo and a photograph of a young girl writing at a desk.

## Billed Entity Applicant Home Page

No Incomplete Invoices are associated with this PIN.



# BEAR Form: Block 1

## Add BEAR Invoice

Applicant Form Identifier

Applicant chooses  
"nickname" for this BEAR

Enter the 9-digit SPIN.  
Always begins  
143xxxxxx

### Block 1: Header Information

[Need Help?](#)

**1. Billed Entity Name**

ELIZABETHTOWN AREA  
SCHOOL DIST

**2. Billed Entity Number**

125681

**3. Service Provider  
Identification Number  
(SPIN)**

**Service Provider Name**

CenturyLink United Telephone Co. of  
Pennsylvania FKA Embarq

**Applicant FCC Form 498 ID**

Form 498 ID is pre-populated. If it's not showing, it means the 498 has not yet been submitted or USAC approved.

**4. Contact Name**

**5. Contact Telephone Phone**

(  )  -  ext.

**Contact Fax**

(  )  -

**Contact Email**

This information  
is pre-populated,  
but can be  
changed.

**6. Total Reimbursement  
Amount**

(total from Block 2, Column  
14)

\$ 0.00

This amount will be  
calculated based on the  
data provided in Block 2.

# BEAR Form: Block 2

## Block 2: Line Item Information Per Funding Request Number

[Need Help?](#)

7. FCC Form 471 Application Number  (from Funding Commitment Decision Letter)	8. Funding Request Number (FRN)  (from Funding Commitment Decision Letter)	9. Bill Frequency	10. Customer Billed Date	11. Shipping date to Customer or Last Day of Work Performed (mm/dd/yyyy)	12. Total (Undiscounted) Amount for Service	13. Discount Rate	14. Discount Amount Billed to USAC (Column 12 multiplied by Column 13)
1) 1002689	2737879	MONTHLY	07/01/2015		40000.00	30	12000.00

The system will calculate this amount.

The 471 and FRN numbers can be found on your FCDL, or spreadsheet Julie sent with BEAR message.

Only complete Item 10 OR Item 11 – not both. Generally, use Item 10 for C1 and list first date you received services in the funding year. Use Item 11 for C2 and use the PO date.

Enter the total pre-discount amount for eligible charges .

The discount rate will pre-populate based on the FRN number listed in Item 8.

Add Line Item

If you have another FRN with this vendor, you can add it here.

# BEAR Form: Block 3

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Click on each certification box.

## **Block 3: Billed Entity Certification**

**Need Help?**

I declare under penalty of perjury that the foregoing is true and correct and that I am authorized to submit this Billed Entity Applicant Reimbursement Form on behalf of the eligible schools, libraries, or consortia of those entities represented on this Form, and I certify to the best of my knowledge, information and belief, as follows:

- A.** The discount amounts listed in this Billed Entity Applicant Reimbursement Form represent charges for eligible services and/or equipment delivered to and used by eligible schools, libraries, or consortia of those entities for educational purposes, on or after the service start date reported on the associated FCC Form 486.
- B.** The discount amounts listed in this Billed Entity Applicant Reimbursement Form were already billed by the Service Provider and paid for by the Billed Entity Applicant on behalf of eligible schools, libraries, and consortia of those entities.
- C.** The discount amounts listed in this Billed Entity Applicant Reimbursement Form are for eligible services and/or equipment approved by the Fund Administrator pursuant to a Funding Commitment Decision Letter (FCDL).
- D.** I acknowledge that I may be audited pursuant to this application and will retain for at least 10 years (or whatever retention period is required by the rules in effect at the time of this certification), after the latter of the last day of the applicable funding year or the service delivery deadline for the funding request any and all records that I rely upon to complete this form.
- E.** I certify that, in addition to the foregoing, this Billed Entity Applicant is in compliance with the rules and orders governing the schools and libraries universal service support program, and I acknowledge that failure to be in compliance and remain in compliance with those rules and orders may result in the denial of discount funding and/or cancellation of funding commitments. I acknowledge that failure to comply with the rules and orders governing the schools and libraries universal service support program could result in civil or criminal prosecution by law enforcement authorities.

# BEAR Form: Signatory Data/Submit

Click the "signature" certification box.

## Contact Information for Billed Entity Authorized Person:

15. Signature

By logging into your account using your PIN, checking this box, and clicking the "certify" button at the end of the form, you have electronically signed the form. You are reminded that an electronic signature is the same as a handwritten signature on the form. To see a copy of the Terms and Conditions to which you previously agreed, please click on the "Terms and Conditions" menu above.

16. Date 7/27/2016

17. Name GEORGE LONGRIDGE

18. Title/Position BUSINESS MANAGER

20. Address 1 600 EAST HIGH STREET

Address 2

City ELIZABETHTOWN

State PA

Zip Code 17022 -

19. Phone Number (717) 555 - 1111 ext

19a. Fax Number (717) 555 - 1112 ext

19b. Email

jtschell@comcast.net

19c. Name of Authorized Person's Employer

htown Area School District

This information is pre-populated, but can be changed.

This information must be manually entered.

An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number.

Clear Save Certify and Submit

Click "Certify and Submit" to submit the BEAR directly to USAC!

# What Happens Next?

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- After the BEAR is submitted, it is transmitted directly to USAC
  - Vendors no longer approve BEARs
- USAC may review and ask for additional information or copies of invoices/cancelled checks
- After approved, funding is automatically transferred into the bank account listed on the Form 498
  - Reimbursements no longer flow through the vendors
- BEAR Remittance Statements sent to Form 486 contact and Remittance Contact (listed on the 498)
- Applicants could potentially receive BEAR reimbursements within 2-3 days of BEAR submission

# New BEAR Approval Letter Sample

Email Subject line: "Your E-Rate Program Remittance Statement"



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**SCHOOLS AND LIBRARIES BEAR PROGRAM REMITTANCE STATEMENT  
AS OF MONTH DAY, YEAR**

Attn: Applicant Remittance Contact Person  
Applicant Payee Name

RE: FCC Form 498 ID 443XXXXXX

This notice provides an explanation of your entity's Billed Entity Applicant Reimbursement (BEAR) payment for the following invoices.

	<b>Approved</b>
Document Date SPIN SP Name FRN Work Order Number Applicant Name: XXXXXXXXXXXX; SLD Invoice Number:XXXXXXXX;BEAR Letter Date:MM/DD/YYYY; Line Item Detail Number:XXXXXXXX;Amount Requested:XXXXX.XX;	\$100.00
Document Date SPIN SP Name FRN Work Order Number Applicant Name: XXXXXXXXXXXX; SLD Invoice Number:XXXXXXXX;BEAR Letter Date:MM/DD/YYYY; Line Item Detail Number:XXXXXXXX;Amount Requested:XXXXX.XX;	\$100.00
<b>Total Approved Disbursement</b>	<b><u>\$200.00</u></b>
<b>Total Actual Disbursement:</b>	<b><u>\$200.00</u></b>