

## Receiving E-rate Funding: Discounted Bills

---

E-rate rules require all vendors to provide applicants with the choice of receiving discounted bills or paying their bills in full each month and then obtaining reimbursement. Applicants may choose a different discount/reimbursement method for each funding request (FRN), but once the choice has been made and an invoice has been submitted to USAC for payment (either a service provider invoice or an applicant BEAR invoice), that method of invoicing must be continued for the remainder of the funding year.

If you choose to receive discounted bills, the service provider provides discounted bills to the applicant and then submits the Form 474, Service Provider Invoice Form, to USAC for reimbursement. Using this method, the applicant is not required to submit any reimbursement forms to USAC because E-rate funding has been provided to the applicant via a discounted bill. It is important to remember that service providers will not begin issuing discounted bills until the 486 has been submitted to the SLD and your service provider has been notified that the Form 486 has been approved. Therefore, it is in your best interest to submit the Form 486 as quickly as possible after receiving the funding commitment decisions letter.

**How to Request Discounted Bills:** This decision should be conveyed to your service provider ideally as soon as you make your vendor selections for the upcoming funding year – even before the Form 471 application is submitted. This request should be confirmed with your vendor immediately after your Funding Commitment Letter is received electronically via your EPC portal. There is no formal USAC mechanism to inform your service provider which invoicing option you choose; therefore, each company may have different requirements for requesting discounted bills. Some companies just require an e-mail or phone call. Other companies require applicants to complete an online form or paper form specifying which account numbers should be discounted. Please note that some service providers have insisted that you meet their deadlines for informing them of your preference and if you fail to do so, you must use the BEAR reimbursement method.

In order to make that process as easy as possible, below is a list of the most-used vendors in PA and the method to request discounted bills for that company.

Vendor	Discounted Bills Process
<b>Affiniti/Last Mile (formerly Sting)</b>	E-mail Syralja Pollock at <a href="mailto:syralja.pollock@affiniti.com">syralja.pollock@affiniti.com</a> .
<b>AT&amp;T</b>	Upon receipt of your Funding Commitment Decision Letter, AT&T will send an email that includes a hyperlink to submit a GRID that you will complete and return to <a href="mailto:erate.legt@att.com">erate.legt@att.com</a> .
<b>AT&amp;T Mobility</b>	Company will send e-mail after you have been funded with a form to be completed if you would like discounted bills. You also may contact them directly for a copy of the form at (866) 829-8184 or <a href="mailto:NECOEMobility@att.com">NECOEMobility@att.com</a> .
<b>Broadview Networks</b>	E-mail <a href="mailto:eRate@broadviewnet.com">eRate@broadviewnet.com</a> for a simple discount selection choice.
<b>Century Link (Embarq)</b>	Company will send e-mail after you've been funded with a form to be completed if you would like discounted bills. You also may

	contact them directly for a copy of the form at <a href="mailto:erate@centurylink.com">erate@centurylink.com</a> .
<b>Comcast</b>	A copy of Comcast's 2016 form is attached to this message. E-mail completed form to: <a href="mailto:Erate_Funding@cable.comcast.com">Erate_Funding@cable.comcast.com</a> .
<b>Consolidated Communications</b>	E-mail Stephanie Sapp at <a href="mailto:Stephanie.Sapp@consolidated.com">Stephanie.Sapp@consolidated.com</a> .
<b>Earthlink Business (formerly One Communications)</b>	Call Susan Walters at (616) 988-7341 or <a href="mailto:swalters@onecommunications.com">swalters@onecommunications.com</a> to request discounted billing.
<b>Frontier (Commonwealth and CTSI)</b>	Complete the attached Discount Request Form or complete the online form at: <a href="http://www.frontier.com/discountprograms/ERate">http://www.frontier.com/discountprograms/ERate</a> .
<b>Ironton Telephone Company</b>	E-mail Patricia Stewart at <a href="mailto:pstewart@ironton.com">pstewart@ironton.com</a> .
<b>Level 3</b>	Contact Amy Ban at 720-888-5990/ <a href="mailto:amy.ban@level3.com">amy.ban@level3.com</a> . Ask for e-mail confirmation that the request has been processed.
<b>One Communications</b>	Contact Susan Walters at <a href="mailto:swalters@onecommunications.com">swalters@onecommunications.com</a> .
<b>PenTeleData</b>	E-mail <a href="mailto:edusales@corp.ptd.net">edusales@corp.ptd.net</a> .
<b>Service Electric Telephone Company</b>	E-mail Patricia Stewart at <a href="mailto:pstewart@ironton.com">pstewart@ironton.com</a> .
<b>Sprint/Nextel</b>	E-mail Christina Halley at <a href="mailto:Christina.Halley@sprint.com">Christina.Halley@sprint.com</a> .
<b>Sunesys</b>	E-mail Nicole Jackson at <a href="mailto:njackson@sunesys.com">njackson@sunesys.com</a> .
<b>Verizon</b>	Verizon will email a new Data Gathering Form to the Contact email on the FCDL as the Waves are sent out. Form must be returned, signed/dated. Deadline for discounts to be requested is November 1, 2016. Email <a href="mailto:vz.erate.east@verizon.com">vz.erate.east@verizon.com</a> or call Verizon's E-rate Office at 1-800-547-5474 for assistance.
<b>Verizon Wireless</b>	Company sent a series of e-mails to affected customers requiring an online form be completed by June 24, 2016. If you have questions about your discounted bills, contact VW at <a href="mailto:ERATE@VERIZONWIRELESS.COM">ERATE@VERIZONWIRELESS.COM</a> or 866-221-4123.
<b>Verizon Business/Verizon Select Services</b>	Verizon will email a new Data Gathering Form to the Contact email on the FCDL as the Waves are sent out. Form must be returned, signed and dated. Deadline for discounts to be requested is November 1, 2016. E-mail Jeannine Tabb at <a href="mailto:Jeannine.tabb@verizon.com">Jeannine.tabb@verizon.com</a> for assistance.
<b>Windstream</b>	Company will send e-mail asking if you would like discounted bills. You also may contact them directly at <a href="mailto:e-rate@windstream.com">e-rate@windstream.com</a> or 402-436-4466.
<b>XO Communications</b>	Call Jamie E. Sontany at 615-777-7763 to request discounted bills.

Below is a short Q & A regarding the discounted billing process.

**Q1. How does my service provider know how much to discount my bill?**

Once the SLD receives your Form 486 identifying the actual Service Start Date, your service provider is notified by the SLD to begin billing the discount. If you will receive your discount directly on your bill, your service provider will begin to apply the percentage discount that was approved by the SLD to the services eligible for discount on your bill.

In order to apply discounts accurately (discounting the right account, only for eligible services, only at eligible facilities) your service provider may need additional information from you. In either event it is a good idea to discuss discounted bills with your service provider, so that you know when and how your bills will be discounted.

**Q2. What if the discount on my bill is not the same discount percentage for which I was approved on my Funding Commitment Decision Letter?**

Your service provider is instructed by the SLD to apply the discount to eligible services used by eligible entities. In many cases eligible services are bundled with ineligible services and/or services are being received jointly by eligible and ineligible entities. Your service provider, therefore, will likely determine a "composite" or "effective" discount for the accounts upon which you were committed discounts. For this reason, the actual discount that you receive on your monthly bill may differ from the approved discount percentage on your Funding Commitment Decision Letter.

**Q3. What if I have filed my Form 486 and still have not received a discounted bill from my service provider?**

Contact your service provider to verify that you have provided all necessary information to the service provider and that the service provider intends to apply your percentage discount to your bill.

**Q4. What if the discount appeared on previous bills but now has stopped?**

- *Have you received the entire amount of your funding commitment in the form of discounts on your bills? If the answer is yes, this is why your discounts have stopped.*

To verify the amount of your funding commitment, you should refer to your electronic Funding Commitment Decision Letter, and find the dollar amount of your "Funding Commitment Decision" for the Funding Request Number (FRN) associated with this service provider. If you have received more than one Funding Commitment Decision Letter relating to this FRN, refer to the most recent letter.

- *Have you submitted a Form 500 to cancel or reduce the FRN or to change the Contract Expiration Date? If the answer is yes, this may be why your discounts have stopped.*

If the answer to both questions is NO, contact your service provider to find out why you have stopped receiving discounts on your bills.



# **Billed Entity Applicant Reimbursement (BEAR) Overview**

---

When an applicant pays in full for the services or equipment that have been approved for E-rate discounts, the applicant must submit FCC Form 472 Billed Entity Applicant Reimbursement (BEAR) form to obtain the payment of the E-rate discount funding.

Beginning July 1, 2016, all BEAR forms must be submitted online. No paper BEARs are accepted. The BEAR form is filed in the SLD's legacy online filing system (outside of EPC).

There are two prerequisites before an applicant can submit a BEAR beginning July 1, 2016:

(1) The applicant must have a PIN to be able to access the online BEAR filing system. This PIN is different from the EPC log-in and password.

Applicants that need a BEAR PIN may submit a PIN request using the PIN request template (attached). The request must be submitted in the applicant's EPC portal by creating a customer service case and uploading the completed template.

(2) The applicant must have submitted their direct deposit banking information to USAC by completing FCC 498, "Service Provider and Billed Entity Identification Number and General Contact Information Form." This form is a new requirement since USAC needs to obtain applicants' banking information so that they can make direct BEAR reimbursement payments to applicants. Previously BEAR payments had been sent to the service provider and a check was issued by the service provider and mailed to the applicant. By submitting the FCC Form 498, each applicant is assigned a "498 Filer ID" number. Once the Form 498 is approved, the 498 Filer ID number will be prepopulated in the applicant's online BEAR form when the applicant logs into the BEAR system. If the Form 498 has not yet been submitted or approved, the applicant will be unable to complete and certify the BEAR form. Please refer to the separate EPC Form 498 filing guide in this tab.

## **BEAR Deadline**

The deadline for submitting BEAR forms for recurring services – services that are provided on a monthly basis – is October 28 following the end of the funding year. For example, the BEAR deadline for FY 2016 recurring service FRNs is October 28, 2017. The BEAR deadline for FY 2017 recurring service FRNs is October 28, 2018.

The deadline for submitting BEAR forms for non-recurring charges is January 28 following the end of the funding year. Non-recurring charges are also referred to as one-time costs, and are usually incurred for equipment purchases or special construction charges for network build-out of broadband services. For example, the BEAR deadline for FY 2016 non-recurring service/equipment FRNs is January 28, 2018. The BEAR deadline for FY 2017 non-recurring service/equipment FRNs is January 28, 2019.

## **New BEAR Deadline Regulation – File BEAR or Request Extension by Original BEAR Deadline**

The BEAR deadline previously was an administrative deadline that USAC had flexibility to enforce. Applicants were permitted to request an extension of the deadline either before or after the original deadline had been passed. More recently, the BEAR deadline has now become a regulatory requirement and it is codified in the FCC rules. This means that USAC no longer has administrative flexibility to grant invoice deadline extensions unless such requests meet the regulatory requirements.

The new rule prescribes that one single invoice extension deadline request will be approved automatically by USAC **IF** the request is submitted on or before the original invoice deadline. The extension will be for 120 days from the original deadline. For example, if the original BEAR deadline is October 28, 2016 (which

is the applicable deadline for FY 2015 recurring service FRNs), and an extension is requested on or before that date, the new deadline will be 120 days later, or February 25, 2017. (Since February 25, 2017 falls on Saturday, the deadline should then be the next business day or February 27, 2017).

Importantly, if the applicant fails to request the extension by the original deadline, USAC has no authority or discretion to approve the extension. Late filed extensions will be automatically denied. Such requests then must be submitted to the FCC as a waiver request. The FCC is extremely strict in enforcing the invoice deadline procedures and has denied nearly all of the invoice deadline waiver requests since the new regulation went into effect.

*Applicants need to make sure that they take appropriate action by the original invoice deadline to ensure that they preserve their ability to receive their E-rate funding reimbursements.*

### **Invoice Deadline Extension Request Process**

Invoice deadline extension requests may be submitted either online using "Submit a Question" or via fax.

Submit a Question: [http://www.slforms.universalservice.org/EMailResponse/emr\\_select.aspx](http://www.slforms.universalservice.org/EMailResponse/emr_select.aspx)

Under 'Topic Inquiry' select "Invoice Deadline Extension Request."

Then select "Other."

Complete the cover page, and then in the 'Questions' text box, list the following information:

- Applicant Name
- Billed Entity Number (BEN)
- 471 #
- FRN #
- Vendor Name
- SPIN #

Via Fax: (973) 599-6526 Note that you are requesting an Invoice Deadline Extension.

Include the following information:

- Applicant Name
- Billed Entity Number (BEN)
- 471 #
- FRN #
- Vendor Name
- SPIN #

# How to Submit an Online BEAR

1) Log-in to the Online BEAR System at: <https://www2.sl.universalservice.org/bear/login.aspx> using your Billed Entity Number (BEN), PIN, email address, and the last name of the PIN user. (If the system says it's an invalid e-mail address, try typing it in CAPs, or try using the last name of the contact person.) Unlike all other SLD forms, the Online BEAR requires you to log-in using your PIN instead of certifying the form after it's been submitted.

2) Click on "New BEAR Form" to start a new BEAR. (If you ever want to track a BEAR that's been submitted (even previously submitted paper-submitted BEARs) or is pending, instead click on "Track Form" and enter the query information.)

3) When the blank BEAR Form appears:

Confirm that the Applicant FCC Form 498 ID number appears. If your organization has more than one 498 ID number, select the correct 498 ID from the drop down box.

If the 498 ID number does not appear, then you will be unable to proceed with filing your BEAR form. You must finalize and obtain USAC's approval of the FCC Form 498 Filer ID number to be able to submit your BEAR form.

4) Enter Applicant Form Identifier

USAC  
Universal Service Administrative Company  
Helping Keep Americans Connected

Need Help?

BEAR Home **New BEAR Form** Track Form Bulk Download Terms and Conditions Logout

### Add BEAR Invoice

Applicant Form Identifier

Block 1: Header Information

Need Help?

1. Billed Entity Name Dunmore School District	2. Billed Entity Number 125995	3. Service Provider Identification Number (SPIN) <input type="text"/>	Service Provider Name Spin Not Found
--	-----------------------------------	---	---

Applicant FCC Form 498 ID  
443014692

4. Contact Name  
PIN Name appears

5. Contact Telephone Phone  
( ) - ext.   
Contact Fax  
( ) -   
Contact Email

6. Total Reimbursement Amount  
(total from Block 2, Column 14)  
\$ 0.00

Items 4 and 5 will be prepopulated with the information associated with the PIN.

5) Fields to complete:

- Item 3: Enter the SPIN for this BEAR (remember a BEAR can only be associated with 1 SPIN)
- Item 7: Enter the Form 471 Number
- Item 8: Enter the FRN Number
- Item 9: Bill Frequency – Leave Blank
- Item 10 (Use for recurring services and skip # 11): The date for # 10 should be the date of the first bill that you received from the service provider for the reimbursements being requested on this BEAR. For example, if you are a FY 2016 BEAR, and your request includes 12 months' worth of bills, your first bill likely was 7/1/2016 or some date in July 2016. If you are only filing for reimbursement on bills from January 2016 - June 2016, your bill date would likely be 1/1/2016 or some date in January 2016.
- Item 11: (Use for non-recurring services and skip # 10): The date in # 11 should be the date that the products were shipped, the last date that the service provider performed its work, or the vendor bill date.
- Item 12: Enter the eligible pre-discount amount spent for this FRN. The online system will then automatically multiply the amount in # 14 by your approved discount and that product will then be entered in # 15. If you incurred more charges that the prediscount amount cap, you should enter the prediscount amount cap in the online system.
- Note: If you have more than 1 FRN for this SPIN, you may click "Add Line Item" at the bottom of Block 2 to enter the new FRN information on the same BEAR.

Block 2: Line Item Information Per Funding Request Number							
<a href="#">Need Help?</a>							
7. FCC Form 471 Application Number	8. Funding Request Number (FRN)	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)
(from Funding Commitment Decision Letter)	(from Funding Commitment Decision Letter)						
1) <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
							<a href="#">Add Line Item</a>

5) Block 3 Certifications:

- A, B, C, D, E: Check the box to the left of each certification.



### 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.

- Item 15: Check the signature box.
- Items 18 - 19: Enter the authorized person's contact information.

6) When you have reviewed and verified all of the information on the form, click the "Certify and Submit" button at the bottom of the form.

### Important BEAR FAQs

#### 1) Can I put all of my reimbursement requests on a single BEAR?

No, a separate BEAR must be completed for each separate SPIN. For example, if you have 2 FRNs that list Comcast, and one FRN that is for AT&T, you can submit both Comcast FRN reimbursement requests on a single BEAR (as long as they have the same SPIN), and submit the AT&T reimbursement request on a separate BEAR.

#### 2) I was committed more funding than I actually spent. Can I request reimbursement for the full amount that was originally committed?

No. Applicants may only seek reimbursement for the exact amount paid for the service instead of just listing the full funding cap (for example, if you were committed \$10,000, but then only spent \$6,000, you can only request E-rate reimbursements based on the \$6000). Please know that the SLD has increasingly been requesting copies of invoices when they review the BEARs as proof that you are requesting the accurate amount. Don't send the invoices with the BEAR, but know they might be requested.

#### 3) I spent more than what was committed on my funding commitment letter (my cap). What should I list on my BEAR -- the cap or the actual amount spent?

The SLD would like you to complete the BEAR with the actual figures of what you spent for the service, and not just list your funding cap amount. For example, if you spent \$10,000, and had a 50% discount, you would list \$10,000 in Column 14 and \$5,000 in Column 15, even if you were only committed \$4,000. The reason is that the SLD would like to show how much applicants are actually spending on services and also so they know that you are not just listing the funding commitment amount (the cap), but have actually added up how much was actually spent in each of the 12 months using the actual vendor bills. Unfortunately, they will only reimburse you up to the amount that you were committed.

**4) What if I receive my BEAR Notification Letter and it lists that \$0 was approved?**

This typically means that there was an error made on the BEAR Form and the applicant must correct the error and resubmit to the SLD. Many years ago, the SLD reached out to the applicant to correct the mistakes found on the Form 472s completed by applicants but this is no longer the case. Now the SLD will "pass zero" the BEAR (meaning they will not authorize any funding), but it does not mean the E-rate funding is gone. It simply means that the applicant must resubmit the BEAR with corrected information and typically there is an explanation on the BEAR explaining what was incorrect to help identify the error. If the explanation is inadequate, contact the Client Service Bureau at 888-203-8100 for more information.

**BEAR Notifications/Approvals**

There are two different notifications provided by USAC regarding BEARs.

1) The FCC 498 Remittance Contact Person will receive an email from [CustomerSupport@usac.org](mailto:CustomerSupport@usac.org) with the subject line: YOUR E-RATE PROGRAM REMITTANCE STATEMENT with your 498 Filer ID number (note that applicant 498 Filer ID number begin with 443).

The notice will describe the payments that have been authorized to be made to your organization’s bank account.

**SCHOOLS AND LIBRARIES BEAR PROGRAM REMITTANCE STATEMENT  
AS OF OCTOBER 10, 2016**

**Attn:** 498 Remittance Contact  
**RE:** FCC Form 498 ID 443#####  
**APPLICANT NAME**

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

**Approved**

10/10/2016 143001398 Verizon Pennsylvania LLC. 2835021 *APPLICANT BEAR ID* \$229,983.60  
Applicant Name: APPLICANT NAME SLD Invoice Number:2446902;BEAR  
Letter Date:10/10/2016;Line Item Detail Number:8205345;Amount  
Requested:231911.40;Partial Paymnt, Inv > Remaining Commitment;1201;

In the above example the notification provided the following information:

Date of Notice	10/10/2016
Vendor SPIN	143001398
Vendor Name	Verizon Pennsylvania LLC
FRN	2835021
Applicant’s BEAR Form ID	<i>APPLICANT BEAR ID</i>
Applicant Name	APPLICANT NAME
SLD Invoice Number (system assigned number)	2446902
Date of BEAR Letter	10/10/2016
Amount Requested for reimbursement	\$231,911.40
Amount of funding remaining in FRN available	\$1201.00
Approved Reimbursement Amount	\$229,983.60

It is important for the 498 General Contact to share this notification with the BEAR contact person so that they are aware of the BEAR notification.

2) The paper BEAR notification letter will also be sent to the BEAR contact person.



# E-rate Form 498 (Banking Data) Filing Guide FY 2017



## Purpose of the Form 498

---

- \$** Beginning July 1, 2016, *all* E-rate BEAR reimbursements will be sent via ACH (Automated Clearing House) directly to the school or library's bank account
  - Even for FY 2015 BEARs
- \$** The Form 498 identifies the bank and account information where the BEAR reimbursements should be electronically deposited
- \$** It's a simple form to complete, but must be certified AND approved by USAC before any BEARs can be submitted

## Who Can Submit the Form 498?

---

- EPC User Permission Settings dictate who can create/submit the Form 498
  - “School or Library Officials” can start, complete, submit, certify, modify, and deactivate Forms 498
    - Important: Consultants cannot be designated as “School or Library Officials”
  - “General Financial Contacts” can start, complete, and submit Forms 498, but cannot certify new or updated Forms 498 or deactivate existing Forms 498
    - Consultants CAN be designated as “General Financial Contacts” and may draft the Form, but it must be sent to a School or Library Official for submission/certification

3

## Information You’ll Need...

---

- Name of General Financial Contact
- 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
- Copy of Voided Check or Bank Statement
  - Uploaded to USAC to verify banking data submitted on the Form 498


4

# Verify Who Has Permission to Create Form

- From your EPC Landing Page:

**My Landing Page**

Funding Request Report | FCC Form 470 | FCC Form 471 | Manage Users | Manage Organizations | USAC Website | Contact Us | Help



Welcome, OWEN J ROBERTS SCHOOL DISTRICT

**My Entities**


Entity	Entity Number	City	State	Zip Code
OWEN J ROBERTS SCHOOL DISTRICT	126238	POTTSTOWN	PA	19465
NORTH COVENTRY ELEM SCHOOL	20977	POTTSTOWN	PA	19465
EAST COVENTRY ELEM SCHOOL	20979	POTTSTOWN	PA	19465

**Click on District Name**




5

# Who Has Permission to Create the Form

- Select 'Related Actions' from left toolbar, then 'Manage User Permissions' from Lightning Bolt list



Summary  
News  
**Related Actions >**  
Customer Service  
Additional Information  
Discount Rate  
Contracts  
FCC Forms

-  **Create a New User**  
This function allows you to create a user for your entity.
-  **Add or Remove Existing Users**  
This process allows user to add and remove users from an organization
-  **Manage User Permissions**  
This function allows you manage the permissions for one or more users.

6

# Identifying 498 Permissions

---

## User Permissions

In the table below, you can designate the permissions that you wish to give to each of your users for the various tasks you can complete in the portal. This table will continue to grow as more functionality comes online.

- Full rights users can start, complete, submit and certify forms.
- Partial rights users can start and enter data in the form, but cannot submit and certify them.
- View Only users can only see forms created by other people in your organization but cannot create forms themselves.
- Form 498 School or Library Officials can start, complete, submit, certify, modify, and deactivate Forms 498.
- Form 498 General Financial Contacts can start, complete, and submit Forms 498, but cannot certify new or updated Forms 498 or deactivate existing Forms 498.

Name	Email	Apply All	470 Permission	471 Permission	498 Permission
Paul Sanfrancesco	psanfran@ojrsd.com	<input type="checkbox"/>	Full	Full	School or Library Offi

All users in your EPC portal will be shown here, along with their permissions for each form.

- To Draft and Submit form, permission must be "School or Library Official."
- To Draft form only, permission will be set to "General Financial Contact."

## Let's Complete a Form 498

---



# Finding the Form 498 in EPC

- Select Related Actions from left toolbar, then Create Form 498 from Lightning Bolt list (it's near the bottom of the list)

The screenshot shows the USAC (Universal Service Administrative Company) interface. On the left, a navigation menu includes 'Summary', 'News', 'Related Actions >', 'Customer Service', 'Additional Information', 'Discount Rate', 'Contracts', and 'FCC Forms'. The 'Related Actions >' item is highlighted with a red box. An arrow points from this box to a list of actions on the right. The 'Create FCC Form 498' action is highlighted with a red box. The other actions are 'Manage Contracts', 'Manage Connectivity Questions', and 'Upload Entity Profile Data'.

**USAC**  
Universal Service Administrative Company

Summary  
News  
**Related Actions >**  
Customer Service  
Additional Information  
Discount Rate  
Contracts  
FCC Forms

**Manage Contracts**  
Create, edit, and remove contracts for your organization

**Create FCC Form 498**  
This function allows you to create an FCC Form 498 for your entity.

**Manage Connectivity Questions**  
Form for Entities to answer required Connectivity Questions.

**Upload Entity Profile Data**  
This function allows you to bulk upload your child schools details.

9

# General Information

## Application Nickname

Please enter an application nickname here \*

Owen J Roberts SD

Make up a form nickname

## Organization Information

### Name

OWEN J ROBERTS SCHOOL DISTRICT

Name Company is Doing Business As (DBA) or Formerly Known As (FKA)

Holding Company Name

Fields not required

### Mailing Address

901 RIDGE RD  
POTTSTOWN, CHESTER, PA 19465-8423

Federal EIN, or TAX ID Number of Holding Company

123456789

Federal EIN or Tax ID  
Number required (9 digits,  
no dashes)

10

# General Financial Contact

---

## General Financial Contact of OWEN J ROBERTS SCHOOL DISTRICT

Enter General Financial Contact \*

- Name entered must match a “user” in EPC
- Can be any user, even a consultant

# Federal ID and DUNS Numbers

---

## Further Details

All of these key pieces of data are required.

Federal Employer Identification Number \*

123456789

Dun and Bradstreet Number (DUNS) \*

013664552 ←

“Data Universal Numbering System” number (DUNS or D-U-N-S) is a proprietary system developed and regulated by Dun & Bradstreet (D&B) that assigns a unique numeric identifier, referred to as a "DUNS number" to a single business entity.

FCC Registration Number

0003263845



Note: The FCC Registration Number should pre-populate (note: this is not the same as the Form 471 FRN number).

## Don't Know Your DUNS Number?

---

- The easiest way to look it up is at:  
<http://e-ratecentral.com/us/DUNSLookup.asp>

**D-U-N-S@ Lookup**

Try another BEN: [D-U-N-S Lookup](#)

**D-U-N-S Lookup**

BEN:

Enter your E-rate Billed Entity Number (BEN) and it will search/display results, if available.

**Search Results for BEN 126238**

<b>DUNS</b>	013664552
<b>Name</b>	Owen J Roberts School District
<b>Address</b>	901 Ridge Rd Pottstown, PA 194658423 Chester

D&B's D-U-N-S database does not include BENs. We did our best to match entity information on file with USAC to D&B's data. If the above results do not match your entity please try [D&B's online D-U-N-S@ database](#).

13

## Other Ways to Find DUNS Number

---

- You can also search for your organization, by name, through D&B's online D-U-N-S database:  
<https://iupdate.dnb.com/iUpdate/companylookup.html>
- Or call (866) 705-5711 to speak to a representative
- If your organization does not have a DUNS Number, you can apply online through Dun & Bradstreet's website:  
<http://www.dnb.com/get-a-duns-number.html>

14

# Remittance Contact

---

- If the Remittance Contact is the same as the General Financial Contact on the previous page, check the “Yes” box and data will be prepopulated below.

## Remittance Contact

---

Is the Remittance Contact the same as the General Financial Contact?

Yes

## Contact Information

---

First Name

Julie

Last Name

Tritt Schell

Middle Initial

Title

Consultant

Phone Number

717-730-7133

Phone Number Extension

Email Address

jtschell@comcast.net

15

# Remittance Contact

---

- The Remittance Contact will receive e-mail notifications when funds have been transferred into the applicant’s bank account
  - Note: The BEAR Contact Person also will receive confirmation that the BEAR has been approved (via paper until an e-mail notification process has been established)
- If the Remittance Contact is NOT the same as the General Financial Contact on the previous page, don’t check “yes” box and enter the data below. *Note: The Remittance Contact does NOT have to be a user in EPC.*

## Remittance Contact

---

Is the Remittance Contact the same as the General Financial Contact?

Yes

## Contact Information

---

First Name\*

Last Name\*

Middle Initial

Title\*

Phone Number\*

Phone Number Extension

Email Address\*

16

# Financial Information

---

## Financial Information

Remittance Financial Institution\*

NAME OF APPLICANT'S BANK

Financial Institution Account Number for ACH\*

031202084

ACH Financial Institution Transit Number\*

111111111

This is your **Account** Number.

This is your **Bank's** Transit #.

Be 100% certain that the Bank Transit Number and Your Account Number are accurate and placed in the correct fields.

*The order of these fields is reversed from how these items are commonly displayed.*

17

# More Than 1 BEN Connected to the Same Bank Account?

---

- If your school or library has more than one Billed Entity connected to this bank account, you can list that additional BEN number here.
- Most applicants will leave this blank.
  - If you have a district and consortium Billed Entity Number, list the additional entity number here.

## Block 14: Billed Entity Number/FCC Form 498 Association

If you are an entity that has chosen to receive your E-rate Program payments directly (BEAR invoicing), please enter the Billed Entity this FCC Form 498.

Billed Entity Number

126238

Billed Entity Name

OWEN J ROBERTS SCHOOL DISTRICT

Add Additional BEN Number



|

Add to List

18

## Certifying

---

- If a School or Library Official completed the form, they can click on 
- If a General Financial Contact completed the form, they must click on in order to send the Form 498 to a “School or Library Official” in EPC for their approval. 

19

## USAC Verification Process

---

- After the 498 is certified, the applicant must provide third party documentation that verifies the banking information submitted on the Form 498.
- Third Party Bank Documentation
  - A clear image of a voided check or
  - A statement from your financial institution that includes the bank name and your account number
- Upload documentation at <http://efileweb.usac.org/ContributorManagement/V1/BankValidation>
  - Be sure to have your 498 Filer ID handy when you go to this link. The 498 Filer ID is a 9-digit number (that begins with 443) and is shown on the Form 498 that you just filed
- If you are having problems with the Form 498, you may contact USAC at (888) 641-8722 and select option 5, then Option 2, or e-mail [finopsprocessing@usac.org](mailto:finopsprocessing@usac.org).

20

# USAC Verification Process

- After bank account proof is sent to USAC, USAC will send an “Approved Form 498” e-mail to the General Financial Contact
- After receiving this e-mail, you may file your Form 472 BEAR and the reimbursements will be deposited directly into your bank account
- Both the Form 498 Remittance Contact and the BEAR Contact will receive copies of the BEAR Approval Letter/Remittance Statements after the BEAR has been approved which will look like this:

21

# BEAR Form Remittance Statement

**SCHOOLS AND LIBRARIES BEAR PROGRAM REMITTANCE STATEMENT  
AS OF OCTOBER 10, 2016**

**Attn 498 Remittance Contact**  
\*\*\*\*\*  
**APPLICANT NAME**

RE: FCC Form 498 ID 443#####

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

Date of Notice/Vendor SPIN/Vendor Name/FRN/Applicant's BEAR ID/Applicant's Name/SLD Invoice #/BEAR Notification Letter Date/Line Item Detail # (system assigned)/BEAR Requested Amount/Funds remaining for disbursement	Approved
10/10/2016 143001398 Verizon Pennsylvania LLC. 2835021 <i>APPLICANT BEAR ID</i> Applicant Name: <i>APPLICANT NAME</i> SLD Invoice Number:2446902;BEAR Letter Date:10/10/2016;Line Item Detail Number:8205345;Amount Requested:231911.40;Partial Paymnt, Inv > Remaining Commitment;1201;	\$229,983.60

22





# Verification of Service Provider Invoices to SLD

---

When a service provider provides discounted bills to an applicant, the service provider must submit a Form 474, Service Provider Invoice, to SLD to obtain payment of the E-rate discount portion of the charges.

## **Applicant Request to Verify Service Provider Invoices**

Applicants are able to request SLD to have the opportunity to verify each service provider Form 474 that is submitted. This is called an "invoice check" and may be requested as follows: If an applicant wants to ensure that SLD will only pay service provider invoices that are first certified by the applicant, the applicant may submit an "invoice check" to the SLD as follows:

To request an invoice check, applicants should go online to "Submit a Question" at [http://www.slforms.universalservice.org/EMailResponse/EMail\\_Intro.aspx](http://www.slforms.universalservice.org/EMailResponse/EMail_Intro.aspx) and follow these steps:

- Click the "Continue" button.
- Under "Topic Inquiries" choose "Invoicing-General Questions" and click "Go."
- Choose "I have a general question regarding invoicing" and click "Continue."
- Enter the requested information, choosing "No" under the attachments question and click "Continue."
- In the text box enter the following;
  - Billed Entity Number (BEN)
  - BEN name
  - Funding year (FY)
  - FCC Form 471 number
  - Funding Request Number(s) (FRN)
  - Service Provider Identification Number (SPIN)

The applicant will receive an automated response with the case number which should be saved for future reference.

Each time a Form 474 that references an FRN subject to an invoice check is submitted for payment, USAC will ask the service provider to obtain a certification from the applicant that the invoiced services were delivered and installed. Payment will not be processed on an FRN subject to an invoice check until the applicant makes this certification.

## **PIA Invoice Request for Applicant Completion of Service Certification**

In other circumstances when the service provider submits an invoice to SLD for E-rate discount payment, the applicant may be requested to complete a service certification to verify to SLD that the services and/or equipment were delivered to the applicant. This certification provides an additional level of program integrity to ensure that payments are disbursed to service providers after the service or products are delivered.

There is typically a seven (7) response period that the applicant must meet to complete and submit the Service Certification to the PIA invoice reviewer. The applicant should obtain the PIA reviewer's email so that the completed service certification can be submitted directly to the reviewer (and not sent to the service provider).

It is advisable for the applicant to request the service provider to forward to the applicant a copy of the invoice on which the FCC Form 474 SPI is based. The applicant also may need to research the check number and date of the check that was issued to pay for the applicant's non-discount share of the invoice cost. The service provider may be requested to assist the applicant in providing this information; however, the applicant and not the service provider is responsible for completing and signing the service certification. If the applicant has any questions about how to complete the service certification, the applicant should contact the PIA reviewer directly and not ask these questions of the service provider.

Because the service certification is not sent directly to the applicant but instead is sent to the service provider, there could be a delay in the service provider's transmittal of the request to the applicant. If this occurs and the applicant is unable to comply with the seven (7) deadline, the applicant should contact the PIA reviewer directly and request an extension of time.

The applicant should retain a copy of the service certification for their records.