E-rate Form 472 "BEAR" Reimbursement Filing Guide FY 2016



Julie Tritt Schell PA E-rate Coordinator September 2017

Purpose of the Form 472 "BEAR"

- 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 <u>more</u> than your funding commitment cap
 - Can only be reimbursed for the eligible amount <u>spent</u>, multiplied by the approved discount
 - Cannot submit a request <u>up to</u> your cap if you didn't spent that much
- BEARs for recurring services can be submitted monthly, quarterly, semiannually 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

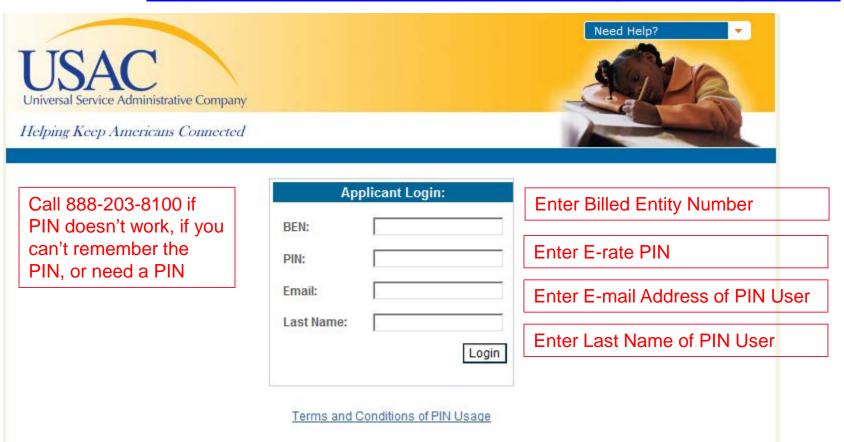
- BEARs are due within 120 days from the last day to receive service
 - Recurring Services = October 28, 2017 (for FY 2016)
 - Non-Recurring Services = January 28, 2018 (for FY 2016)
- If the BEAR cannot be submitted by this date, the applicant must submit an Invoice Deadline Extension Request (IDER) to USAC by the invoice deadline
 - One, 120-day extension will automatically be granted
 - No further extensions can be granted
 - FCC will not approve a late-submitted invoice or IDER request

File BEARs in Legacy System (NOT EPC)

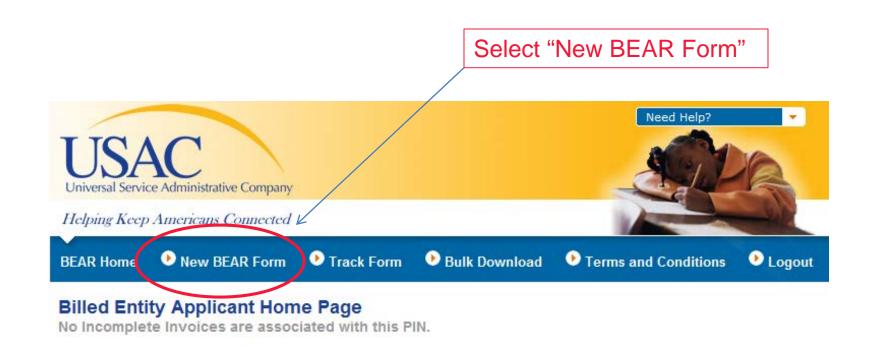
- BEARs must be filed using the legacy BEAR system
 - They are NOT filed in EPC
 - File at: https://www2.sl.universalservice.org/bear/login.aspx
 - Can no longer file paper BEARs
- Must use the E-rate PIN to access online BEAR
 - The BEAR PIN is different than your EPC log-in
 - If you don't have a BEAR PIN, complete the PIN Request Template at: http://www.usac.org/ res/documents/sl/xls/PIN-request-template.xlsx
 - And then upload it into EPC by creating a Customer Service Case
- BEARs are no longer approved by vendors
- All E-rate BEAR reimbursements are sent via Direct Deposit directly to the school or library's bank account
 - Reimbursement payments do not flow through the vendor they are electronically transferred from USAC to the applicant
- 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
 - If you already have an approved 498 from last year, do not complete again this year
 - If you need to changing your banking data, log into EPC > Records > Form 498
 > Related Actions > Modify Form 498

Let's File a Form 472 BEAR

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



How to Start a BEAR

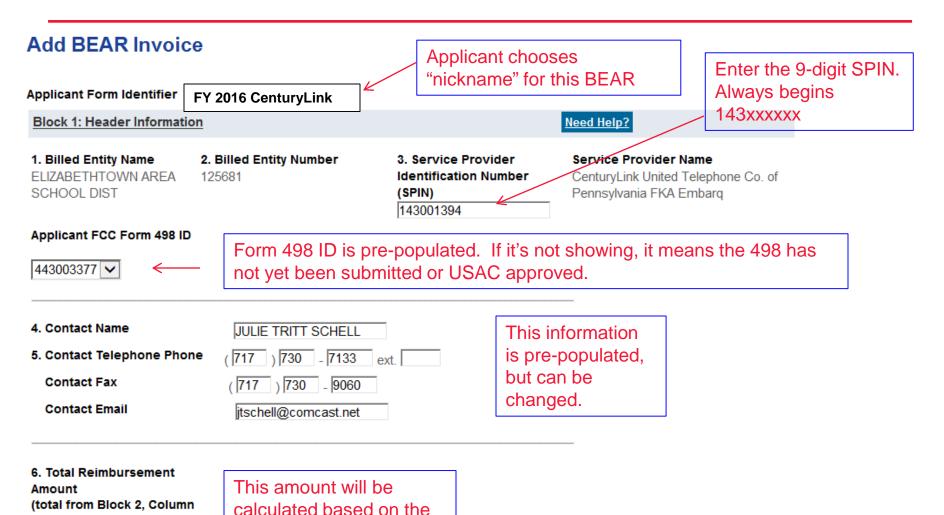


BEAR Form: Block 1

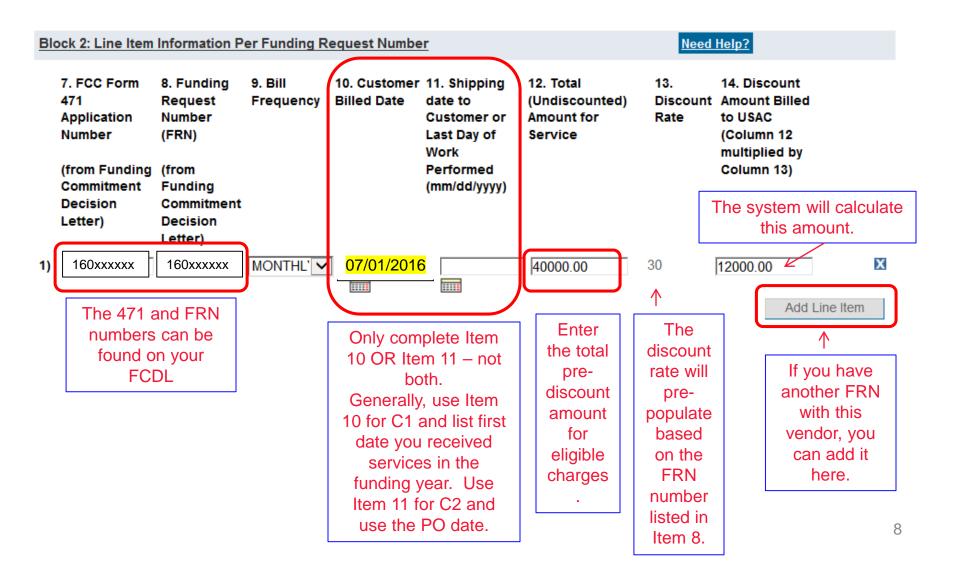
data provided in Block 2.

14)

\$ 0.00



BEAR Form: Block 2



BEAR Form: Block 3

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.
- ▼ 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 7/16/2017

This information is prepulated, but can be changed.

17. Name	GEORGE LONGRIDGE
18. Title/Posit	ON BUSINESS MANAGER
20. Address	600 EAST HIGH STREET
Address	
City	ELIZABETHTOWN
State	PA
Zip Code	17022 -
'	

19. Phone Number

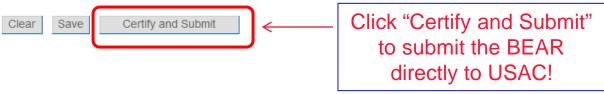
19a. Fax Number

19b. Email

19c. Name of Authorized Person's Employer (| 717 |) | 555 | - | 1111 | ext (| 717 |) | 555 | - | 1112 | ext jtschell@comcast.net | htown Area School District

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.



What Happens Next?

- 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"



Helping Keep Americans Connected | www.usac.org

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.

		Approved
Document Date	SPIN SP Name FRN Work Order Number Applicant Name: XXXXXXXXXXX; SLD Invoice Number: XXXXXXXX;BEAR_Letter Date: MM/DD/YYY; Line Item Detail Number: XXXXXXX;Amount Requested: XXXXXXXX;	\$100.00
Document Date	SPIN SP Name FRN Work Order Number Applicant Name: XXXXXXXXXX; SLD Invoice Number: XXXXXXXX;BEAR_Letter Date: MM/DD/YYY; Line Item Detail Number: XXXXXXX;Amount Requested: XXXXXXXX;	\$100.00
Total Approved	Disbursement	\$200.00
Total Actual Disbursement:		\$200.00