

# E-rate Form 472

## “BEAR” Reimbursement

### Filing Guide

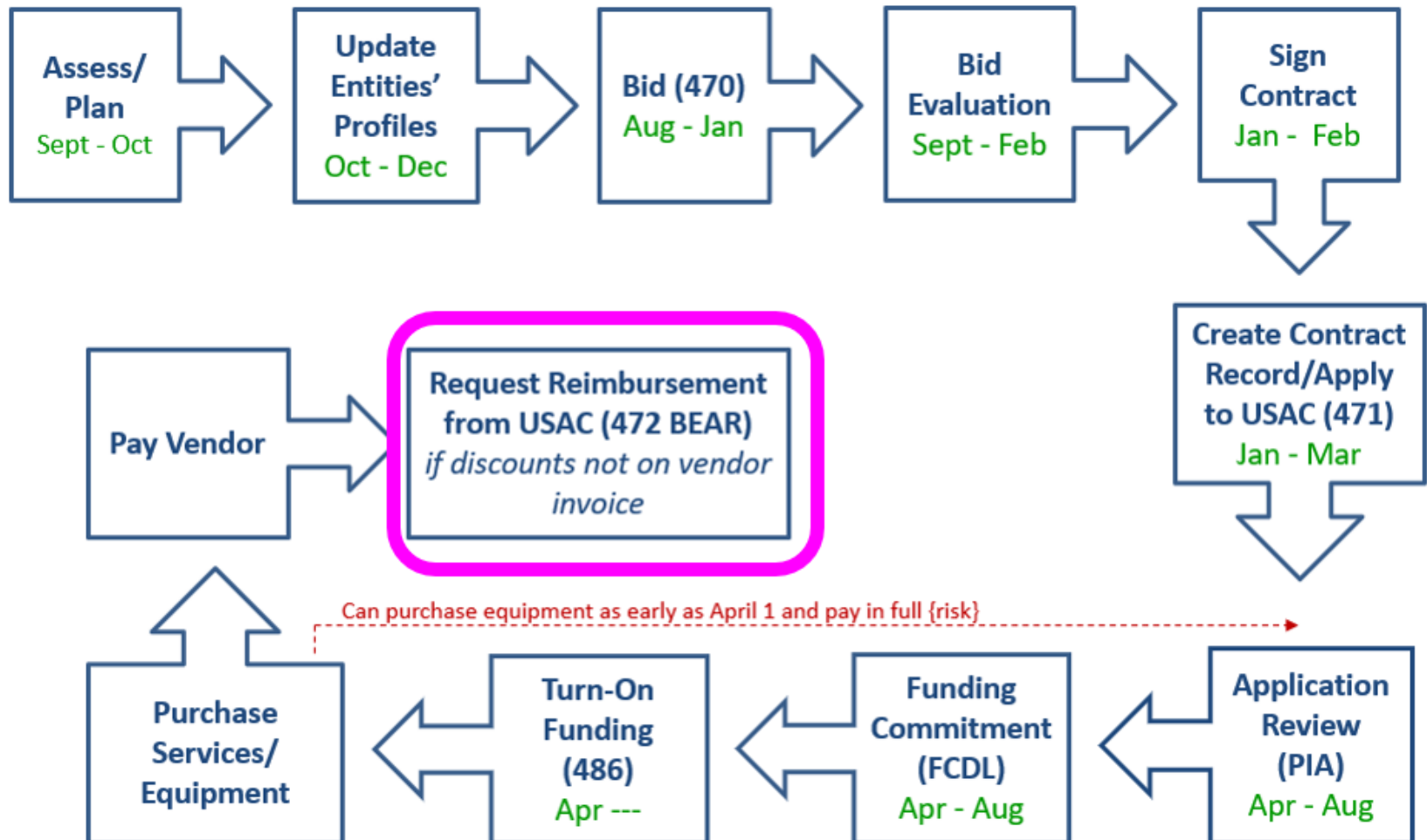
#### FY 2019 & FY 2020

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Presented by Julie Tritt Schell  
PA E-rate Coordinator  
for the Pennsylvania Department of Education  
Oct 2020

# You are **Here** in the E-rate Process:



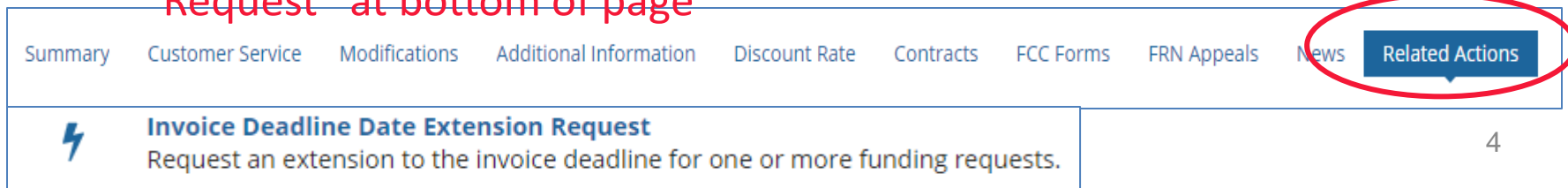
# Purpose of the Form 472 “BEAR”

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- If an applicant has not received discounted vendor invoices, they must file the Form 472 “BEAR” to seek reimbursement from USAC for the E-rate eligible amount
  - If the applicant received discounted bills, it is up to the vendor to submit the SPI Form (Service Provider Invoice) to USAC and no BEAR form can be filed
- 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 did not 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

# When to File BEARs (latest date)

- Normally, BEARs are due within 120 days from the last day to receive service. But due to COVID-19, FCC has extended invoicing deadlines as follows:
  - **FY 2019:**
    - Recurring Services = February 25, 2021
    - Non-Recurring Services = January 28, 2022
- If the BEAR cannot be submitted by this date, the applicant **must** submit an Invoice Deadline Extension Request (IDER) to USAC (in EPC) by the original 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
  - Select “Related Actions” in EPC, then “Invoice Deadline Extension Request” at bottom of page



The screenshot shows a navigation bar with the following tabs: Summary, Customer Service, Modifications, Additional Information, Discount Rate, Contracts, FCC Forms, FRN Appeals, News, and Related Actions. The 'Related Actions' tab is circled in red. Below the navigation bar is a notification box with a lightning bolt icon, titled 'Invoice Deadline Date Extension Request' and containing the text 'Request an extension to the invoice deadline for one or more funding requests.'

# When to File BEARs (earliest date)

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- **Recurring Services**

- BEARs may be filed on or after July 1 of the new funding year, but are typically filed after the funding year has ended
  - Note: Installation of recurring services may begin as early as January 1 (or contract signing date, whichever is later), prior to the funding year
  - However, actual services may not begin until July 1 and a BEAR cannot be submitted until after July 1

- **Non-Recurring Equipment Purchases**

- Equipment may be purchased and installed as early as April 1 before the start of the July 1 start of the funding year
- BEARs may be filed on or after July 1, presuming the application was approved and Form 486 filed
  - Applicants that purchased equipment prior to July 1 and paid for the equipment in full will submit the BEAR shortly after July 1 to get reimbursed
  - Vendor invoices are permitted to be dated beginning July 1

# File BEARs in One Portal System (NOT EPC)

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- After logging into One Portal and validate your identity, you will see a screen that has both EPC and BEAR links
- Click on the BEAR link and then enter your BEAR PIN/credentials.
  - If you do not see the BEAR link after logging into One Portal, it means you do not have a BEAR PIN.
  - BEAR PINs are person-specific, are only available to Authorized EPC Users for the school or library, and cannot be shared among other users.
- To request a BEAR PIN, complete the short [PIN Request Template](#) and then upload it into EPC by creating a Customer Service Case.
  - USAC will then mail you a new PIN in a week.
  - A BEAR PIN Request Guide is available at: <http://e-ratepa.org/wp-content/uploads/2020/10/Form-472-BEAR-PIN-Request-Guide.pdf>.
- BEARs are filed without any vendor involvement and do not require vendor certification or approval

# Direct Deposit of BEAR Reimbursements

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- All E-rate BEAR reimbursements are sent via Direct Deposit directly to the school or library's bank account
  - Payments are made directly from U.S. Treasury via electronic transfers to the applicant's bank account
  - Vendors are not involved with the flow of BEAR payments
- 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
  - To determine if you have an approved Form 498, log into the Online BEAR System, and if a Form 498 ID doesn't appear in the form, it means you don't have an approved 498 on file with USAC.
    - If you don't have a BEAR PIN yet and want to see if you have an approved 498, log into EPC > Records > Form 498s > Click on 498 if one is showing to see the Status. If no 498 is showing, then there isn't one on file with USAC.
- To update the Form 498 with new banking information, or to indicate "Business Type" and provide your DUNs number:
  - Log into EPC > Records > Form 498 > Related Actions > Modify Form 498
  - Form 498 Modification Guide: <http://e-ratepa.org/?p=31938>

# Let's File a Form 472 BEAR

Go to: <https://forms.universalservice.org/portal> to enter One Portal System.  
Then click on FCC Form 472 BEAR and enter BEAR credentials

The image shows a screenshot of the Universal Service Administrative Co. portal dashboard. The top navigation bar is blue with the company logo and name on the left, and a "Sign Out" button on the right. Below the navigation bar, the word "Dashboard" is displayed. The main content area is divided into three columns: "Upcoming Dates" (with a calendar icon and the text "No upcoming dates found."), "Schools and Libraries" (with an upward arrow icon and a description of the E-rate Productivity Center (EPC)), and "Help?" (with links for "Send us a message" and "Call us"). A red dashed box highlights the "FCC Form 472 (BEAR)" section in the "Schools and Libraries" column. A red arrow points from this section to a separate "Applicant Login" form on the right. The login form has a blue header and contains input fields for BEN (128066), PIN (masked with dots), Email (tschell@comcast.net), and Last Name (schell), along with a "Login" button.

Universal Service Administrative Co. Sign Out

Dashboard jtschell@comcast.net

Upcoming Dates  
No upcoming dates found.

Schools and Libraries ^

E-rate Productivity Center (EPC) - E-rate Program participants use the E-rate Productivity Center to manage program processes, receive notifications and to contact customer service.

FCC Form 472 (BEAR) - Applicants file an FCC Form 472 (Billed Entity Applicant Reimbursement (BEAR) Form) to request reimbursement from USAC for the discount amount of the eligible products or services that the applicant has received and paid for in full.

Help?

Send us a message  
Click here

Call us  
(888) 641-8722

**Applicant Login:**

BEN: 128066

PIN: .....

Email: tschell@comcast.net

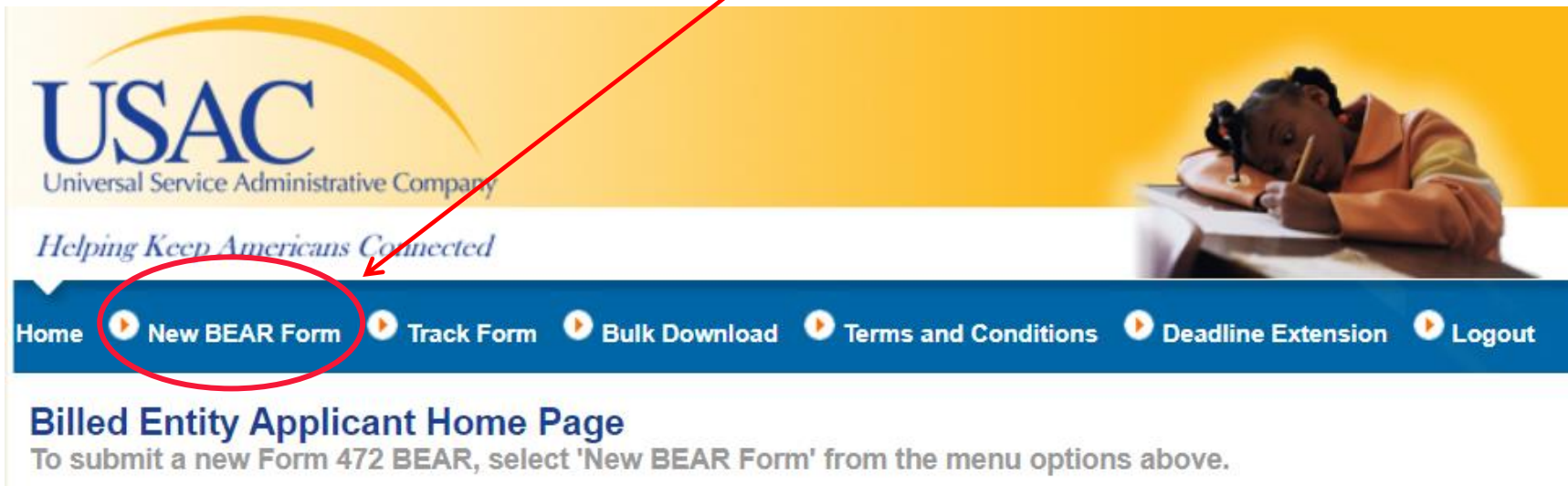
Last Name: schell

Login



# How to Start a BEAR

Select "New BEAR Form"



The screenshot shows the USAC website header. On the left, the USAC logo is displayed with the text "Universal Service Administrative Company" and the tagline "Helping Keep Americans Connected". On the right, there is a photograph of a young girl in a school uniform resting her head on a desk. Below the header is a dark blue navigation bar with white text and right-pointing arrow icons. The menu items are: Home, New BEAR Form, Track Form, Bulk Download, Terms and Conditions, Deadline Extension, and Logout. The "New BEAR Form" option is circled in red, and a red arrow points from a text box above to this option.

**Billed Entity Applicant Home Page**  
To submit a new Form 472 BEAR, select 'New BEAR Form' from the menu options above.

# Block 1: Contact, SPIN, 498ID

## 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. The BEAR cannot be submitted unless a Form 498 ID is showing here.

#### 4. Contact Name

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

#### 5. Contact Telephone Phone

(  )  -  ext.

#### Contact Fax

(  )  -

#### Contact Email

#### 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.

# Block 2: FY 2019 Recurring FRN

## 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) 190xxxxxx	191xxxxxx	MONTHL	07/01/2019		40000.00	30	12000.00

The system will calculate this amount.

The 471 and FRN numbers can be found on your FCDL.

Only complete Item 10 OR Item 11 – not both.  
For recurring services, use Item 10 and list first date you received services in the funding year (generally always 7/1/2019 for FY 2019).

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.

# Block 2: FY 2020 Non-Recurring FRN

## 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) 200xxxxxx	200xxxxxx	One-Time <input checked="" type="checkbox"/>	07/01/2020		40000.00	80%	32,000.00

The system will calculate this amount.

The 471 and FRN numbers can be found on your FCDL.

**Only complete Item 10 OR Item 11 – not both.**  
For non-recurring services, such as C2 equipment, use Item 11. **Note: this date cannot be before 7/1/2020 for FY 2020 FRNs.**

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.

# Block 3: Certifications

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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.

# Block 3: 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 7/15/2019

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
  - Category 2 BEARs often are asked for copies of vendor invoices to substantiate charges

# BEAR Remittance E-mail Sample

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



Helping Keep Americans Connected | [www.usac.org](http://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.

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



# \$0-Funded BEARs

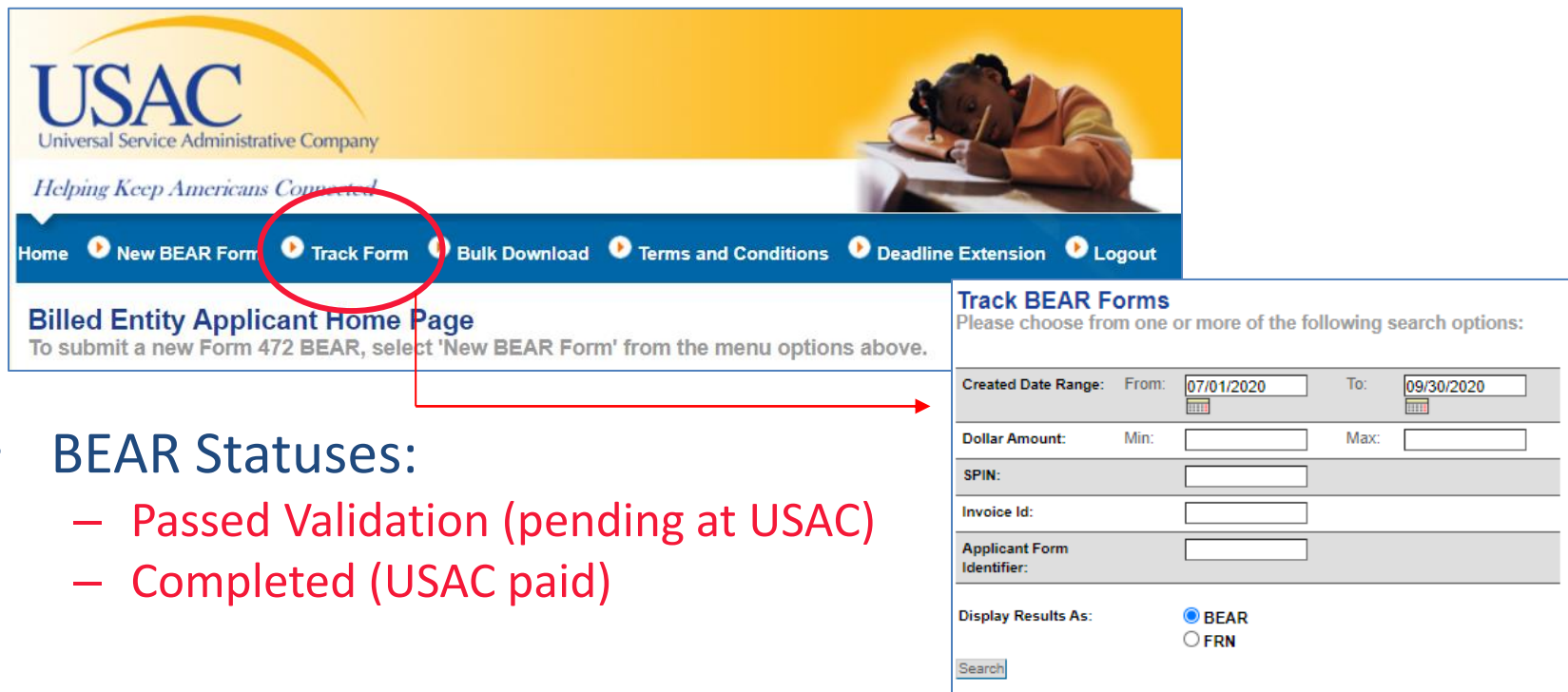
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- If your BEAR approval letter lists \$0 as the disbursement amount, you must do one of the following:
  - 1) If the invoice deadline has not passed, resubmit the BEAR with the accurate information
    - If you are unsure what was inaccurate on the BEAR, call CSB at 888-203-8100 and ask
    - *The most common reason a BEAR is \$0-funded is due to an inaccurate date listed in Item 10*
  - 2) If the invoice deadline HAS passed, submit an appeal to USAC (in EPC) within 60 days of the BEAR letter, requesting an additional 30 days to submit the corrected BEAR

[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#)  
[Appeal](#) | [Manage My Organization](#) | [USAC Website](#) | [Contact Us](#) | [Help](#)

# Pending BEAR Statuses

- To track a submitted BEAR, go to BEAR home page, click on Track Form and enter the date range or invoice ID



The screenshot displays the USAC website interface. At the top left is the USAC logo with the tagline 'Universal Service Administrative Company' and the slogan 'Helping Keep Americans Connected'. Below this is a navigation menu with items: Home, New BEAR Form, Track Form (circled in red), Bulk Download, Terms and Conditions, Deadline Extension, and Logout. Below the navigation menu is a section titled 'Billed Entity Applicant Home Page' with the instruction: 'To submit a new Form 472 BEAR, select 'New BEAR Form' from the menu options above.' To the right of this section is a 'Track BEAR Forms' search interface. It includes a search bar and several filter options: 'Created Date Range' (From: 07/01/2020, To: 09/30/2020), 'Dollar Amount' (Min: [input], Max: [input]), 'SPIN' ([input]), 'Invoice Id' ([input]), and 'Applicant Form Identifier' ([input]). At the bottom of the search interface, there are radio buttons for 'Display Results As:' with 'BEAR' selected and 'FRN' unselected. A 'Search' button is located at the bottom left of the search interface. A red arrow points from the 'Track Form' menu item to the search interface.

- BEAR Statuses:
  - Passed Validation (pending at USAC)
  - Completed (USAC paid)