



E-Rate Invoicing Training

Applicant & Service Provider Webinar

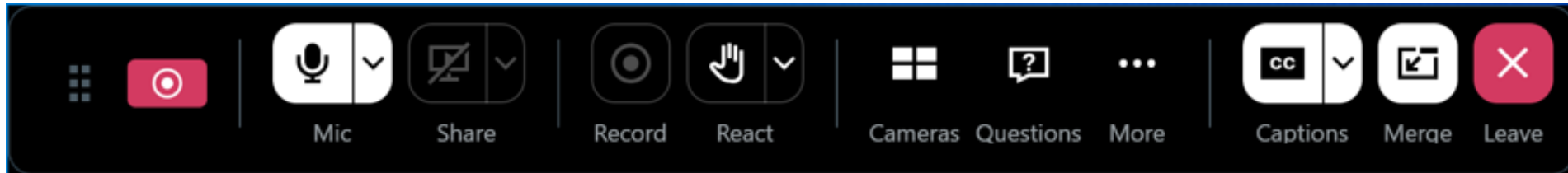
June 18, 2026

Disclaimer

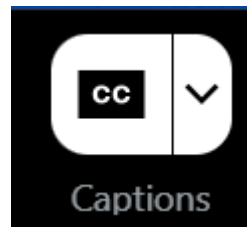
- To accommodate attendees, real-time closed caption is an option during this presentation.
- Each attendee has the option to turn captioning on or off.
- If you choose to use captioning, we apologize in advance for any transcription errors or distractions and appreciate your understanding.
- **Please be aware, this webinar is being recorded.**

Housekeeping – Closed Captioning (CC)

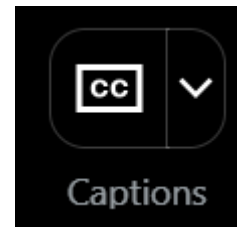
- Attendees control their own captioning



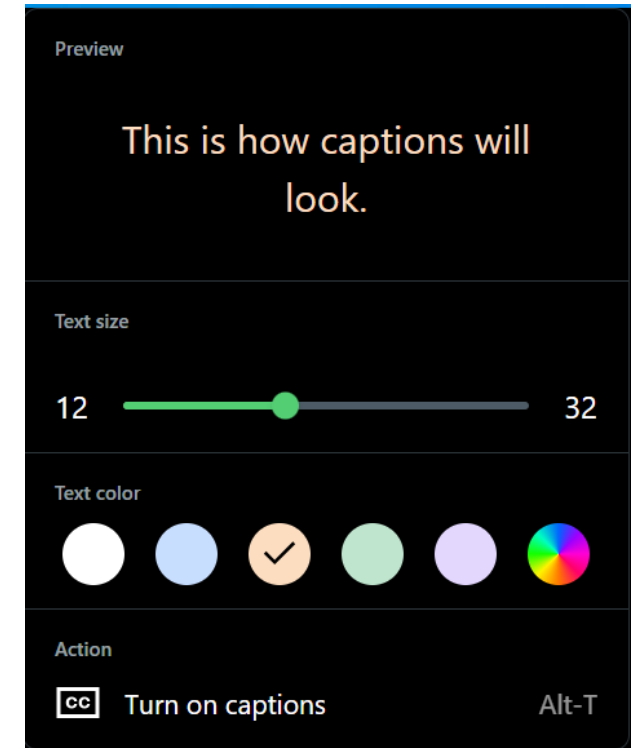
- You control the font size and color on CC
- Toggle CC off and on at your preference



Captions ON



Captions OFF



Housekeeping – Audio

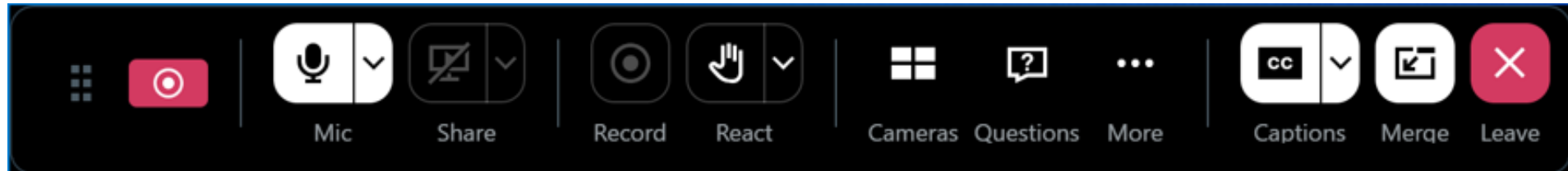
- Audio is available through **your** computer's speakers
- Double check your speaker settings
- Make sure you are connected to a source that works
- The audience is muted
- If your audio or slides freeze, restart the webinar



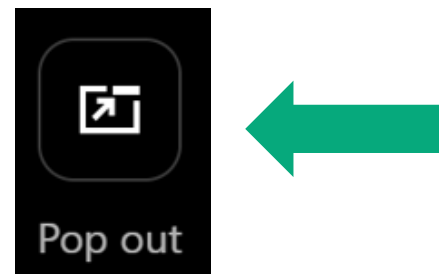
Housekeeping – Screen Views

GoTo Webinar

- Two ways to view the webinar
 1. Multiple windows open, can **merge** into one



2. One window for all content, can **pop out** into multiple windows

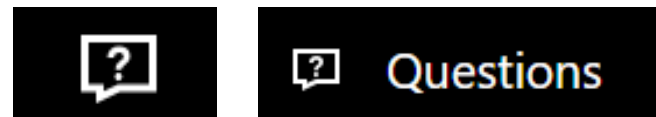


Housekeeping – Materials & Questions

- A copy of the slide deck is in the **Materials** section of the webinar panel



- Enter questions at any time using the **Questions** box



- If the slides freeze, restart the webinar

A screenshot of a mobile application interface for a webinar. At the top, it says "Questions" with a close button (X) on the right. In the center, there is a large question mark icon inside a speech bubble. Below this, it says "No questions yet" and "Questions you send and answers from the staff will appear here". At the bottom, there is a text input field with the placeholder "Enter your question". Below the input field, it says "Your question will be sent to staff" and there is a "Send" button.

Housekeeping – Technical Issues

- Exit the webinar and click the Check System Requirements link **in the event confirmation email** to determine whether your computer meets GoToWebinar's requirements.
- If issues persist, call (833) 851-8340 to troubleshoot with GoToWebinar.

E-Rate Customer Service Center (CSC)



Call us at (888) 203-8100

Monday – Friday 8 a.m. to 8 p.m. ET



Create a customer service case

1. Log in to the [E-Rate Productivity Center \(EPC\)](#)
2. Select the **Contact Us** link from the upper right menu on the landing page.

Meet the E-Rate Team



Pamela Lloyd

Senior Manager
Invoicing



Darpan Desai

Senior Program Analyst
Invoicing



Viola Raymond

Program Analyst
Invoicing



Samantha Jones

Senior Program Analyst
Invoicing



Fred Theobald

Director
Finance



Nekose Wills

Senior Communications Specialist
Outreach

Agenda

- Invoicing Overview
- Preparing to Invoice
- SAM.gov / UEI Requirements and Filing an FCC Form 498
- Filing an Invoice
- Invoice Reviews
- Record Retention and Open Data
- Key Takeaways

Key Learning Objectives

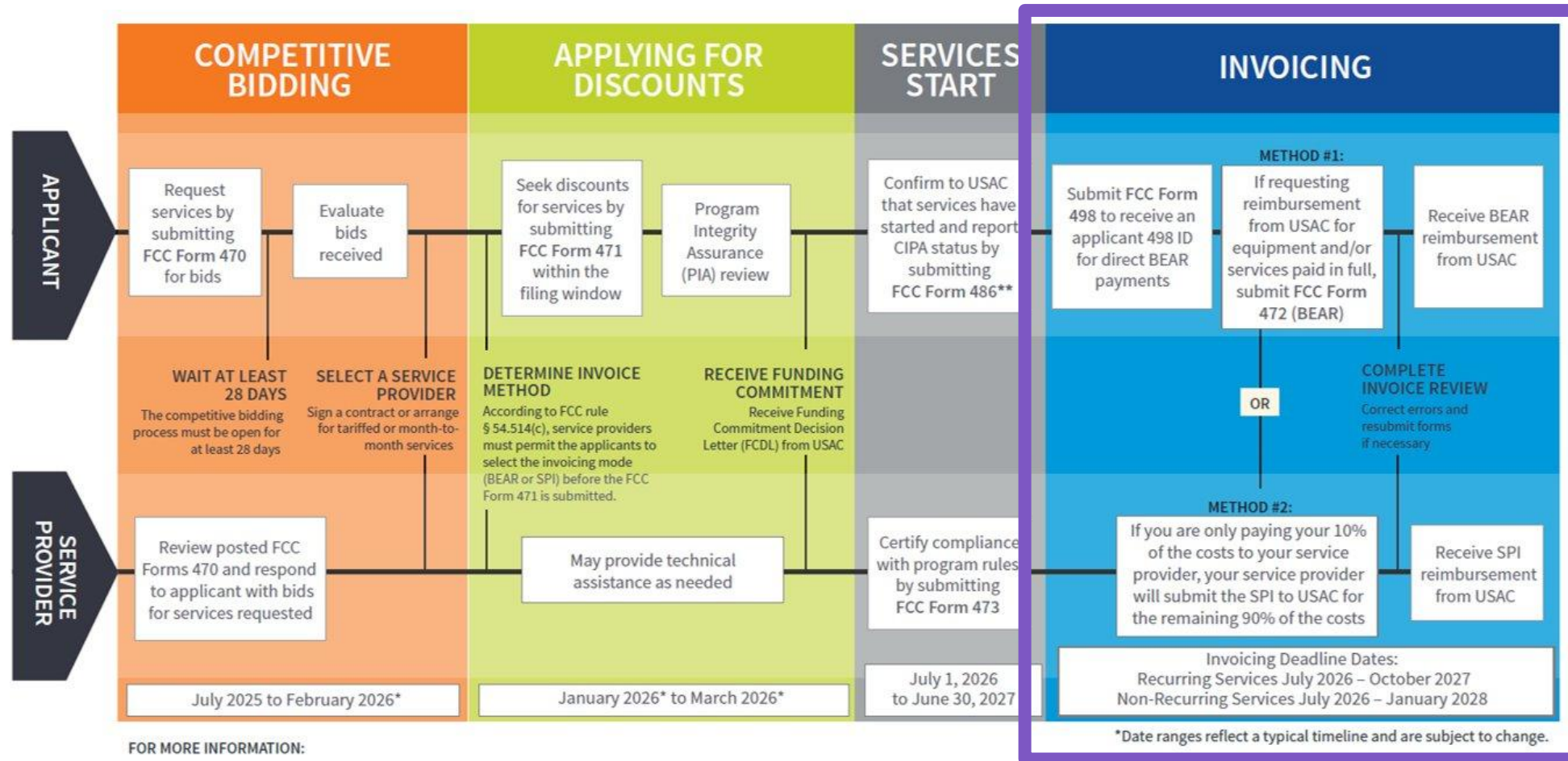
- **Funding Year 2026 Invoicing Mode selection is made on the FCC Form 471**
- Timeline to submit invoices (**before** the invoicing deadline)
- Changes to the Invoice Deadline Date (IDD) [FCC 26-30](#)
- Properly certifying forms (only full rights users can certify)
- Seeking the invoice deadline extension (even if you do not think you will need it)
- Invoicing for **approved** equipment, quantities, and rates of service
- Preventing duplicate invoice submissions
- Document retention rules (at least 10 years)
- Responding in a **timely** manner to all outreach (to expedite your payment)
- The appeals process (60 days to appeal decisions to USAC and 60 days from the date of the USAC appeal decision to appeal to the FCC)

Invoicing Overview

Invoicing Essentials

- **Invoicing selection (BEAR or SPI) now required on the FCC Form 471**
- The Service Provider Annual Certification (SPAC) form is **required annually** for all service providers
- Invoices for **2016 and after** are processed in **EPC**
- Invoices from **2015 and before** are processed via **customer service case**
- Disbursements are **weekly**
- With changes to the FY2026 Eligible Services List ([DA 25-1069](#)), some items classified under BMIC became internal connections (IC), thus changing invoicing protocols

Invoicing via FCC Forms 472 (BEAR) or 474 (SPI)



FOR MORE INFORMATION:

- Website: The application process is broken down in detail for both applicants and service providers on the Schools and Libraries Program website (www.usac.org/sl).
- Glossary of Terms: Definitions for program terms and acronyms.
- **Consortium members report their CIPA status by submitting the FCC Form 479 to their consortium leader. The consortium leader then files the FCC Form 486.
- To adjust funding commitments and/or modify the dates for receipt of services after the FCDL is issued, file the FCC Form 500.

Two Ways to Invoice USAC – Option 1

Billed Entity Applicant Reimbursement (BEAR) Form - FCC Form 472

- **Applicant pays the Service Provider bill in full before invoicing USAC.**
- Applicant files the BEAR Form and invoices USAC for the discounted share of costs for the approved equipment and services delivered to the eligible Recipient(s) of Service in quantities and at the rates not exceeding those on the **FCC Form 471**.
- Respond accurately, completely, and timely to USAC.
- Applicant must update and certify the FCC Form 498, providing your banking information and backup documents.
 - **Important Note:** In August, USAC will transition to using only the linked account on SAM.gov for banking information and banking information will not be collected on the FCC Form 498.
- All BEAR invoices are due by the invoicing deadline.



Two Ways to Invoice USAC – Option 2

Service Provider Invoice (SPI) Form (FCC Form 474)

- Applicants pay **only their non-discounted share** of costs on the customer bill (the bill from their service provider).
- Service providers invoice USAC for the discounted share of costs of the approved equipment and services delivered to the eligible Recipient(s) of Service in quantities and at the rates not exceeding those on the **FCC Form 471**.
- Service Providers must update and certify the FCC Form 498, providing a SAM.gov unique entity identifier (UIE), banking information and backup documents.
 - **Important Note:** In August, USAC will transition to using only the linked account on SAM.gov for banking information and banking information will not be collected on the FCC Form 498.
- Respond in a timely manner to any USAC invoice review questions.
- All SPI invoices are due by the invoicing deadline.



Preparing to Invoice

Before You Begin

- The invoicing mode/method is **the applicant's choice**.
 - If applicants choose the Service Provider Invoice (SPI) method, consider adding the SPI as a requirement to your FCC Form 470 narrative.
- Beginning in FY 2026, the invoicing mode is selected on the FCC Form 471.
- Service providers are **required** to file their annual Service Provider Annual Certification (SPAC) form for each Service Provider Identification Number (SPIN).
- Both the applicant and the service provider should ensure that there is at least one full rights user for each Billed Entity Number (BEN) or SPIN. **Two full rights users** are recommended.

Before You Begin (cont.)

Decide the invoice frequency:

- Monthly, bi-monthly, quarterly, one-time, etc.

Use the Funding Commitment Decision Letter (FCDL) or information from the Revised Funding Commitment Decision Letter (RFCDL) to complete your invoice:

- Approved services, costs, and quantities
- FCC Form 471 number and Funding Request Number (FRN)
- Approved Recipients of Service (ROS)

Before You Begin – FCDL Terms Defined

- Total cost of the equipment and services before the E-Rate discount is applied = **Pre-Discount**
- $(\text{Pre-Discount Cost}) * (\text{Discount rate}) = \text{Discount Amount}$
 - Discount Amount can also be found in EPC as the “Funding Commitment Request.” This is the amount eligible for funding and payment through the E-Rate program and for payment during the invoicing process.
- $(\text{Pre-discount cost}) - (\text{Discount amount}) = \text{Non-Discount Amount}$
 - The amount the applicant pays for the equipment and services using non-E-Rate funds. The non-discount amount cannot be paid or credited by the service provider.

Before You Begin – FCDL Example

- **Pre-Discount:** (example: \$18,360 billed to the applicant based on quantities and unit rates as applicable)
- **Discount Rate:** (example: 40%)
- **E-Rate Discounts Paid by USAC:** (example: $\$18,360 \times .4 = \$7,344$)
- **Non-Discount Amount Paid by Applicant:** (example: $\$18,360 - \$7,344 = \$11,016$)

FRN Calculation

Monthly Charges	
Total Monthly Recurring Charges	\$1,530.00
Total Monthly Ineligible Charges	- \$0.00
Total Monthly Eligible Charges	= \$1,530.00
Total Number of Months of Service	x 12
Total Eligible Pre-Discount Recurring Charges	= \$18,360.00

Total Requested Amount	
Total Eligible Pre-Discount Recurring Charges	\$18,360.00
Total Eligible Pre-Discount One-Time Charges	+ \$0.00
Total Pre-Discount Charges	= \$18,360.00
Discount Rate	40%
Funding Commitment Request	= \$7,344.00

Service Provider Verifications

The Service Provider Annual Certification (SPAC) Form (FCC Form 473)

- Service Providers file the SPAC annually certifying that they will comply with program rules and requirements.
- Service Providers **must file** the Service Provider Annual Certification (SPAC) form **each funding year for each Service Provider Identification Number (SPIN)**.
- The SPAC form must be filed before USAC can pay invoices.
- For step-by-step directions on how to complete the SPAC online, please see E-Rate Program [FCC Form 473 \(SPAC\) User Guide](#).
- Utilize the [Open Data FRN Status Tool FY2016](#) to verify the status of your SPAC form.
- **Service providers who fail to file the annual SPAC form and prevent an applicant from being able to invoice will be referred to the FCC Enforcement Bureau for further action.** [See DA 25-394](#).

SAM.gov UEI Requirements and Filing an FCC Form 498

SAM.gov Unique Entity Identifier (UEI) Requirement

- **Beginning August 2026**, USAC will begin using **SAM.gov banking** information to remit payment for all Universal Service Fund (USF) invoices and requests for reimbursement.
- **All service providers** and all E-Rate **participants that use the BEAR invoicing method** to receive USF disbursements must have:
 - A Unique Entity Identifier (UEI) on their approved FCC Form 498
 - An active SAM.gov account
 - A valid bank account associated with the SAM.gov account.

Checking for UEI on FCC Form 498

- Service providers and BEAR filers should confirm that their FCC Form 498 **includes a UEI and active SAM.gov account** and that it is connected to the **correct bank account**—specifically, the bank account that is designated to accept USF disbursements.
- To prepare for this change, USAC will contact service providers and BEAR filers by email to ensure they met these requirements.
- USAC created two Open Data tools to assist applicants and service providers. The E-Rate Applicant 498 UEI Confirmation Tool and the USAC Service Provider 498 UEI Confirmation Tool informs participants if a UEI appears on their FCC Form 498. **Applicants and service providers need to visit SAM.gov to find out whether their UEI is active and bank account is valid.**

498 UEI Confirmation Tools

Applicants and service providers need to visit [SAM.gov](https://sam.gov) to find out whether their UEI is active and bank account is valid. Both 498 UEI Confirmation Tools answer the question, “Does my entity have a [SAM.gov](https://sam.gov) UEI on our approved FCC Form 498?”

E-Rate Applicant 498 UEI Confirmation Tool

[\[https://datahub.usac.org/stories/s/34w3-8kyc\]](https://datahub.usac.org/stories/s/34w3-8kyc)

- The tool allows applicants who use the BEAR invoicing method and have filed an FCC Form 472 / BEAR in the last two years to confirm that a [SAM.gov](https://sam.gov) Unique Entity Identifier (UEI) is included on their approved FCC Form 498. Any applicant can use the tool to check if a UEI exists on an approved FCC Form 498.

USAC Service Provider 498 UEI Confirmation Tool

[\[https://datahub.usac.org/stories/s/jh5a-h96x\]](https://datahub.usac.org/stories/s/jh5a-h96x)

- The tool allows service providers to confirm that a [SAM.gov](https://sam.gov) Unique Entity Identifier (UEI) is included on their approved FCC Form 498.

Check Your Applicant 498 UEI Status

Search for an applicant using the Applicant or BEN fields above, then check the 'FCC Form 498 Filed with UEI' column to confirm your FCC Form 498 has the required UEI. If you cannot find your BEN, select 'Clear All' to remove the preset filters. To confirm your SAM.gov status, expiration date, and bank account, visit the [SAM.gov](https://sam.gov) portal.

BEN	FCC Form 498 Filed with UEI	Applicant	Applicant Type	City	State	FCC Form 498 Form Number	FCC Form 498 Status	File Invoice To
10013	No	Robert Louis Stevenson School	School	New York	NY	445097092	Approved	Auto Invoice
10024	No	Headzoo School	School	Las Vegas	NV	440005706	Approved	Auto Invoice
10025	No	Ardenwood Jewish Hospital School	School District	New York	NY	445008000	Approved	Auto Invoice

Check Your Service Provider 498 UEI Status

Search for a service provider using the SPIN, Service Provider Name, or Doing Business As, then check the 'FCC Form 498 Filed with UEI' column to confirm your FCC Form 498 has the required UEI. To confirm your SAM.gov status, expiration date, and bank account, visit the [SAM.gov](https://sam.gov) portal.

SPIN	FCC Form 498 Filed with UEI	Service Provider Name	Doing Business As (DBA)	FCC Registration Number	Physical State	FCC Form
140000111	No	Ver Wireless Telecommunications	Ver Wireless Telecommunications	0000000000	CA	04/15/20
140000113	Yes	Ver Wireless Telecommunications, LLC	Ver Wireless Telecommunications, LLC	0001834808	CA	05/22/20
140000114	Yes	Ver Wireless Telecommunications, LLC	Ver Wireless Telecommunications, LLC	0001834808	CA	04/15/20

NO SAM.gov account + NO UEI = NO payments

- Service providers and E-Rate BEAR **filers who do not have a UEI** and those with only a SAM.gov generated UEI, but **no active SAM.gov account** connected with a bank account, **must visit SAM.gov and complete the registration process.**
 - This process can take up to **six weeks**. USAC recommends starting **as soon as possible**.
 - Once there is a UEI and an active SAM.gov account with a linked bank account, update your FCC Form 498.
 - **REMEMBER:** Beginning in August 2026, no UEI on the FCC Form 498 and/or no active SAM.gov account means no payment disbursements.
- Service providers and BEAR applicants will have to **annually register with SAM.gov** to keep their account active. USAC will **not** be able to process disbursements if the payee's SAM.gov account is inactive.
- For more information, visit USAC's [SAM.gov and UEI Requirement webpage](#).

Filing/Modifying an FCC Form 498

Pertinent financial information and the SAM.gov-generated UEI are collected via the FCC Form 498, allowing service providers invoicing via a SPI and applicants invoicing via a BEAR to receive disbursements. Service providers will receive a Service Provider Identification Number (SPIN, also known as 498 ID) and applicants will receive a 498 ID.

Applicants: Filed through EPC

- Complete and certify the form.
 - Only an Official from the school or library can perform all required actions (initiate, submit, modify, deactivate and/or certify).
 - A **General Contact** can complete the form but **not** certify the form.
- **Please note:** EPC will automatically copy the 498 General Contact information into the Remittance Contact fields.
 - If the Official and General Contact are different people, remember to modify the entries in the Remittance Contact fields **before** the form is certified.
- USAC will verify your account information within two (2) business days, and the submitter will be notified of the approval or rejection via email.

Filing/Modifying an FCC Form 498 (Continued)

Prior to beginning the FCC Form 498 registration, applicants and service providers should have the following information:

- Name of the Company Officer who will be certifying
- Electronic banking information (routing number and banking account number) [Until the SAM.gov switchover is complete in August]
- Unique Entity Identifier (UEI) generated through SAM.gov
 - Information for applicants <https://www.usac.org/e-rate/applicant-process/invoicing/obtain-an-applicant-498-id/>
 - Information for service providers, <https://www.usac.org/service-providers/participating-in-a-usf-program/register-for-a-498-id/>
- [FCC Registration Number \(FCCRN\)](#)

FCC Form 498 Reminders

- When to update Form 498:
 - Banking info changes (with documentation)
 - Adding a UEI, New entity, 'Business Type'
 - Updates can take up to **6 weeks** to obtain a UEI through SAM.gov, which is **required** for this form, please start as early as possible.
- Important Notes:
 - Updates **must** be certified and approved by USAC.
 - Avoid making changes during invoice processing.
 - Uncertified forms = no Treasury disbursement.
- Common Issues:
 - Uncertified changes, typos, missing info, or not linked to BEN
- Need Help?
 - Call 888-641-8722, option 5
 - Email finops-processing@usac.org

FCC Form 498 eLM Video for Applicants

- After completing this course on E-Rate's portion of USAC's website, learners will be able to:
 - Explain what FCC Form 498 is and when to submit it.
 - Create and modify an FCC Form 498.
 - Determine when to modify an existing FCC Form 498 versus create a new one.

The image shows a video player interface. On the left, there is a blurred background image of a hand plugging a cable into a network switch. The main area of the player has a light blue background with a geometric pattern. The title 'How to File an FCC Form 498 for Applicants' is displayed in large, bold, blue text. Below the title is a blue button with the word 'Start' in white. At the bottom, there is a note: 'Please note: This form is only required for Applicants using the BEAR invoicing method.' The USAC logo and 'Universal Service Administrative Co.' are visible in the top right and bottom left corners of the video frame.

How to File an
FCC Form 498
for Applicants

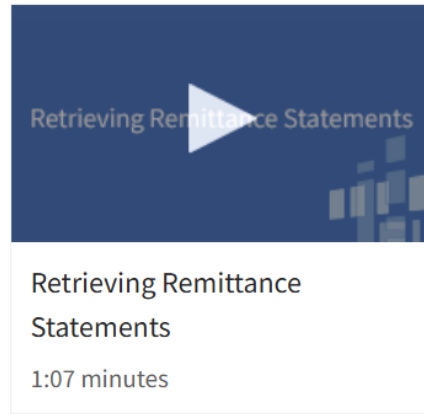
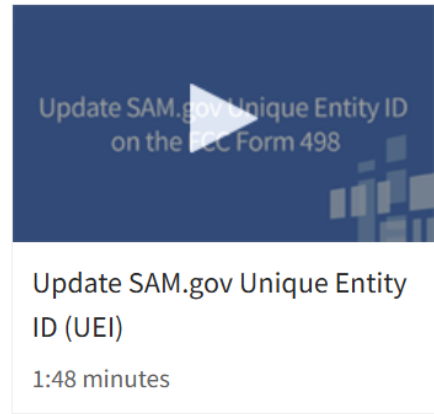
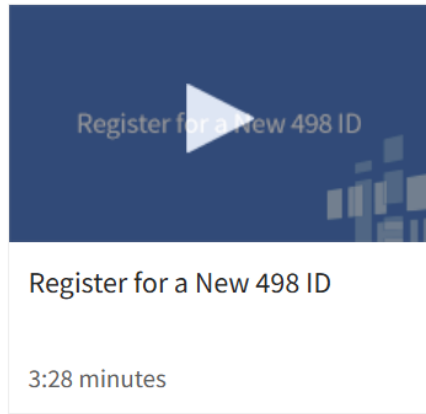
Start

Please note: This form is only required for Applicants using the BEAR invoicing method.

Path to all **E-Rate specific eLMs** on USAC's website:
<https://www.usac.org/e-rate/learn/videos/>

FCC Form 498 Videos for Service Providers

FCC Form 498



[Register for a New 498 ID](#)

[Update SAM.gov Unique Entity ID \(UEI\)](#)

[Retrieving Remittance Statements](#)

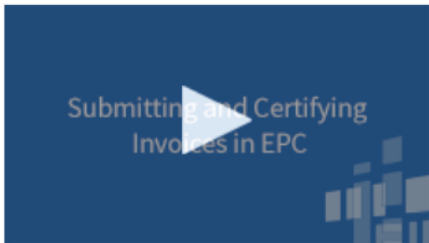
[Submitting Revisions as a Company General Contact](#)

- FCC Form 498 videos for service providers are in the **service provider section** of USAC's website (different from the E-Rate Section)
- <https://www.usac.org/service-providers/learn/videos/>

Filing an Invoice

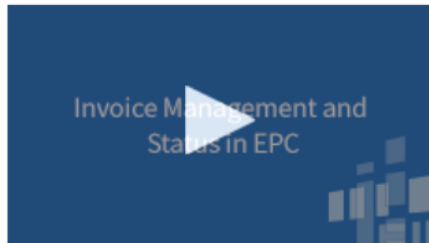
Applicant eLearning Modules (eLMs)

EPC Invoicing for Applicants



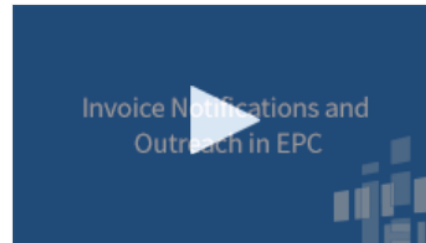
App Course 1: Submitting and
Certifying Invoices in EPC

50:00 minutes



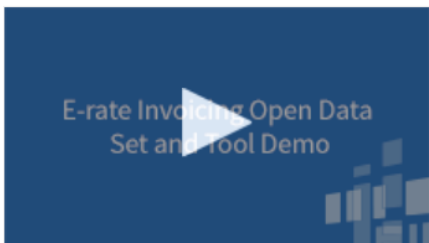
App Course 2: Invoice
Management and Status in EPC

50:00 minutes



App Course 3: Invoice
Notifications and Outreach in

50:00 minutes



E-Rate Invoicing Open Data Set
and Tool Demo

25:46 minutes

- These applicant eLM Videos are under “Learn” then “Videos” on the E-Rate section of USAC’s website
- <https://www.usac.org/e-rate/learn/videos/>

[App Course 1: Submitting and Certifying Invoices in EPC](#)

[App Course 2: Invoice Management and Status in EPC](#)

[App Course 3: Invoice and Outreach in EPC](#)

[E-Rate Invoicing Open Data Set and Tool Demo](#)

Service Provider eLMs

EPC Invoicing for Service Providers



Submitting and Certifying Invoices in EPC

SP Course 1: Submitting and Certifying Invoices in EPC

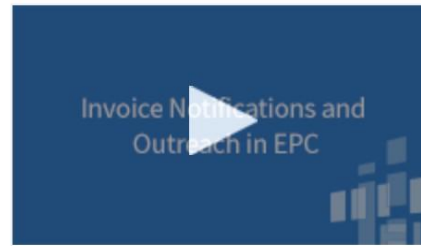
50:00 minutes



Invoice Management and Status in EPC

SP Course 2: Invoice Management and Status in EPC

50:00 minutes



Invoice Notifications and Outreach in EPC

SP Course 3: Invoice Notifications and Outreach in

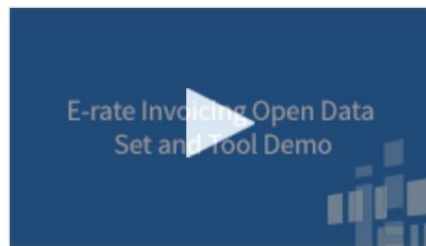
50:00 minutes



Submitting and Certifying ESPI in EPC

SP Course 4: Submitting and Certifying ESPI in EPC

50:00 minutes



E-rate Invoicing Open Data Set and Tool Demo

E-Rate Invoicing Open Data Set and Tool Demo

25:46 minutes

- These service provider eLM Videos are under “Learn” then “Videos” on the E-Rate section of USAC’s website
- <https://www.usac.org/e-rate/learn/videos/>

[SP Course 1: Submitting and Certifying Invoices in EPC](#)

[SP Course 2: Invoice Management and Status in EPC](#)

[SP Course 3: Invoice Notification and Outreach in EPC](#)

[SP Course 4: Submitting and Certifying ESPI in EPC](#)

[E-Rate Invoicing Open Data Set and Tool Demo](#)

When to File an Invoice

- Invoices **must** be submitted before the invoice filing deadline.
 - Generally, the date is **October 28** for recurring services and **January 28** for non-recurring services.
 - Current Invoice Deadline Dates (IDD) are posted in EPC on the FRN detail screen.

Invoice Deadline Date (IDD)

- In a recent Order ([FCC 26-30](#)), the FCC modified the invoice deadline rule, 47 CFR 54.514(a). These changes are effective June 18, 2026.
- Under the amended section 54.514 of E-Rate's rules, the IDD is **no later than** the latest of the following:
 - 120 days after the last date to receive service (or service delivery deadline).
 - 120 days after the date of the Funding Commitment Decision Letter.
 - 120 days after the date of an RFCDL approving a post-commitment request or appeal of a previously denied or reduced funding request that is impacting requests for reimbursement.
 - 60 days after the date of the first notification of a denial or reduction of a timely filed request for reimbursement.

IDD Extension Requests

- Filers are entitled to one, 120-day invoice deadline extension per FRN.
- In a recent Order (FCC 26-30), the FCC modified the invoice deadline extension timing in, 47 CFR 54.514(b). This change is effective June 18, 2026.
- Applicants or service providers may request the single 120-day extension (from the original IDD) **within 15 days of the original IDD.**
 - Example: If the original IDD of an FY2025 FRN is October 28, 2026, the single extension request can be requested until November 12, 2026, but will only extend the IDD to February 25, 2027 (120 days from October 28, 2026).

Invoicing Mode Changes

- After certifying your FCC Form 471, if you would like to change the mode, there are **two options:**
- **Before** the Funding Commitment Decision Letter (FCDL) is issued, applicants can submit a Receipt Acknowledgement Letter (RAL) modification request to change invoice mode.
- **After** the FCDL is issued, invoice mode changes must be completed with an FCC Form 500.
 - Any disbursed funding must be returned.
 - Any pending invoices must be canceled.
 - The Invoice Deadline Date (IDD) must be current.
 - Participant requesting change must be a full rights user for the BEN
- If changing from BEAR to SPI, the applicant will also need documentation showing the service provider consents to the invoice mode change request.
- Both the applicant and the service provider should ensure that there is at least one full rights user for each BEN or SPIN. Two full rights users are recommended.

Invoicing Reminders

- BEAR Invoices: Applicant pays the service provider **in full within 90 days** of receiving services and **before** invoicing USAC.
- SPI Invoices: Applicant pays the service provider their **non-discounted** portion within **90 days** of receiving services.
- Invoice USAC only for your FCC Form 471 approved eligible equipment and services, in the correct quantity and rates, and delivered only to the approved Recipient(s) of Service.
- Invoiced amount to USAC must be for **actual charges**, not the amount committed through the E-Rate program.
- Manual calculations for **prorated** amounts must be accurate.
- Billed rates **must not** exceed the contracted rate. USAC will only pay up to the contracted rate.
- Make sure all equipment purchased is installed and in use **before** the Service Delivery Date.
- Establish a process to **prevent duplicate invoice submission**.
- When closing an entity, make sure all invoices have been paid before putting in the request.

Invoicing Reminders – User Rights

Types of EPC Rights	Description
Full	Can view, prepare, submit, and certify the forms and any post-commitment requests. A Full Rights user can provide responses to outreach from USAC reviewers and sign/certify documents sent for review/response.
Partial	Can view and prepare invoices and post-commitment requests but cannot certify any forms nor reply to USAC outreach. All certifications must be sent to a full rights user.
View Only	Can view certain information about invoices or post-commitment transactions.

Note: There should never be a circumstance in which the view only or partial rights user submits invoices or certifies any forms. This includes completing a form and sending to the full rights user to submit. A certification signed by anyone other than a full rights user will be denied.

Best Practice: Each BEN and SPIN should have at least 2 full rights users.

Invoicing Reminders

- Contract Expiration Date (CED) versus Invoice Deadline Date (IDD)
 - CED – USAC will not pay for services delivered outside of the contract expiration end date.
 - For example, if the CED is 3/1/2025 and the funding year spans from 7/1/2024 - 6/30/2025, we can only pay until the contract expiration date of 3/1/2025.
 - Incorrect CED can be fixed via an FCC Form 500.
 - IDD is the last day to submit an invoice to USAC for an approved FRN.
- Invoicing mode changes must be completed with an [FCC Form 500](#) after the FCDL is issued.

Equipment

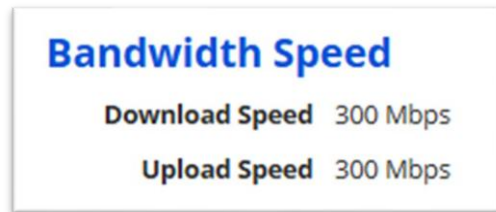
- If an applicant returns equipment to the service provider **prior** to invoicing USAC, neither the applicant nor service provider should invoice USAC for the cost of this equipment.
- If an invoice for returned equipment has been **submitted but not yet been paid**, the invoice can be cancelled by opening a customer service case.
- If an invoice for returned equipment has **already been paid**, disbursements must be returned to USAC. The USAC website contains more information on this process.
- If the approved equipment is no **longer available**, a Service Substitution is required to request the new model. The total commitment for that FRN cannot be increased.

Supplemental Fees Explained

- Supplemental fees are fees that are **billed separately** on the invoice and are covered within the commitment amount but **may not be specifically listed on the FCC Form 471**—such as cross-connections, access point fees, and/or demarcation points.
- Your invoice reviewer will validate your invoice against the equipment and services approved on your FCC Form 471. If the FCC Form 471 does not clearly identify these fees, you should consider proactively providing documentation such as a contract when submitting your invoice.
- During an outreach and/or audit inquiry, you may be required to provide supporting documentation regarding these charges.

Supplemental Fee Example

- Listed on the FCC Form 471



- FCC Form 471 FRN line-item detail 2410XXXXXXX:
 - Bandwidth speed of 300 Mbps for both download and upload. Monthly recurring charge (MRC) is \$750.
- The invoice submitted to USAC shows the following:
 - Internet speed 300 Mbps for \$350
 - Ethernet Lan 2 Gbps for \$400
 - If the 2 Gbps is not listed on the FCC Form 471, USAC will need to determine its eligibility. To streamline the process, it is beneficial to include supporting documentation — such as the contract and the specific page that supports the charge — with your invoice submission. Otherwise, you may be required to provide it later in response to an outreach or during an audit.

Invoice Reviews

Invoice Review

- All invoices undergo a series of automated reviews to validate information such as:
 - FCC Form 471 number
 - Discount percentage
 - Available funding
 - Funding Request Number (FRN)
 - Service Provider Annual Certification (SPAC) Form (FCC Form 473)
 - Invoice Deadline Date (IDD) and Service Delivery Deadline (SDD)
- Errors in any of the above will prevent filers from submitting their invoice in EPC or result in rejection.
- Invoices may also go through a manual review process.

Manual Invoice Review: Validation

Some items the reviewer verifies:

- The customer's bill accurately reflects the invoiced amount.
- Entities listed on bills are approved Recipients of Service on the approved FCC Form 471.
- Amount requested is supported by the bills submitted.
- Service provider named on the bills matches the FRN.
- Bandwidth speeds.
- Equipment and services are eligible and approved on the FCC Form 471's Funding Commitment Decision Letter.
 - Ineligible equipment and services that are not removed at submission are removed during the invoice review.
 - Changes in services or equipment not received requires USAC-approval via a service substitution.
 - Ensure that service substitution requests are submitted to the E-Rate program for approval when the original eligible equipment and services requested are substituted.
 - Ensure that processes are in place to guarantee that the invoiced services match the approved, contracted services.

Manual Invoice Review: Service Certification

- Manual reviews require additional documentation to demonstrate:
 - Payment of the non-discounted portion by the applicant.
 - Invoiced equipment and/or services were delivered and installed.
 - Whether progress payments were included in the contract.
 - Requested amount is for eligible equipment and/or services.
- Applicants with **full rights access** will receive a notification directing them to the Communications tab in EPC.
 - This communication will contain a Service Certification form.
- Only an Applicant full rights user can respond, sign, and certify the Service Certification. USAC may request supporting documentation from the applicant or service provider.
- Responses are due by the “Response Requirement Date.”
- Timely responses are critical — failure to respond may result in invoice denial.
- The Service Certification must be completed and submitted directly only by the full rights user of the applicant.

Manual Invoice Review: Outreach

- USAC may conduct outreach to request additional information / documentation to make a disbursement decision.
- USAC strives for invoice outreach that is **A**ccurate, **C**omplete and **T**imely, which allows the review to occur and payments to be made.
- You have seven calendar days to respond.
- You may request a seven-day extension.
- Lack of response may result in invoice denial.

Invoice Modification and Denials


- Automated and Manual Invoice reviews can result in:
 - Approval
 - Modification
 - Denial
- Common reasons for modification:
 - Discounts applied incorrectly
 - Removal of ineligible equipment and services
 - Discrepancy in quantity
 - Ineligible Recipients Of Service
 - Services for a future date not yet received

Common Causes for Invoice Denial

- Documentation
 - Service certification is invalid/incomplete.
 - Was not signed by full rights user.
 - No response, incomplete response and/or incomplete documentation provided as a response to outreach.
 - Inaccurate invoice submission.
 - Outside the eligible timeframe.
 - Bills do not support the invoiced amount.
 - Duplicate submission.
 - Ineligible equipment and/or services.
- FCC Form 471
 - ROS not approved on the FCC Form 471.
 - Charges not approved on the FCC Form 471.
 - Service provider bill does not match the approved FCC Form 471 (i.e., speed mismatch).

Invoice Decision Codes

- USAC processes the invoice request and issues its [invoicing decision](#).
- When the invoice mode is BEAR, the applicant and the service provider receive a copy of the FCC Form 472 BEAR Notification Letter.
- Service providers will receive a remittance statement after filing a SPI Form.
- Invoice Decision Codes explain the reason for any modifications or denials.
- Invoice information is also available in Open Data.
- For more details on a particular invoice, contact the USAC Customer Service Center.



Universal Service
Administrative Co.

Available for Public Use

Decision Code	Plain Language Decision Explanation	Historical Decision Explanation (Letters issued before October 1, 2020)
40	Either a Customer Billed Date or a Shipping Date to Customer must be entered on this invoice line.	Either Billed Date or Shipped Date must be entered.
41	Either a Customer Billed Date or a Shipping Date to Customer, but not both, must be entered on this invoice line.	Both Bill and Ship Date cannot be entered
42	The Total (Undiscounted) Amount was not provided on the invoice line.	Total (Undiscounted) Amount for Service per FRN (Not Provided)
44	The Discount Amount Billed to SLC was not provided on the invoice line.	Discount Amount Billed to SLC (Null or Zero)
48	The undiscounted amount multiplied by the discount percentage for this FRN is lower than the requested invoice amount.	Discount Amt. Billed Not Valid
60	The service provider has not certified an FCC Form 473 for the funding year.	Service provider must be certified
67	The Shipping Date to Customer is after the Contract Expiration Date or the Service End Date (whichever is earlier).	Ship Date > [%s] days (486) Early Term Dt
68	The Shipping Date to Customer is after the Contract Expiration Date or the Service End Date (whichever is earlier).	Ship Date> [%s] days 471 Term or Cnt Ext
75	The Customer Billed Date entered on the invoice line is outside of the funding year for this FRN.	Billed Date after [%s] fund yr;one time cost
76	The Customer Billed Date entered on the invoice line is outside of the funding year for this FRN.	Billed Date after [%s] fund yr;mnthly cost
77	The Shipping Date to Customer entered on the invoice line is outside of the funding year for this FRN.	Shipped Date after [%s] fund yr;one time cost
78	The Shipping Date to Customer entered on the invoice line is outside of the funding year for this FRN.	Shipped Date after [%s] fund yr;mnthly cost
80	This invoice was submitted after the invoicing deadline for the FRN.	Invoice Received Date is later than Invoice Received Extension Date for FRN
81	The Customer Billed Date entered on the invoice line is after the Invoice Deadline Date.	Bill Date [%s] > [%s] Billed Extension Date; one time cost

Invoicing Appeals

- If your timely-filed invoice is rejected or modified, you have two options:
 - If it is before the IDD, resubmit a corrected invoice.
 - If it is after the IDD, you have the right to appeal the decision.
 - Note: Once the changes in [FCC 26-30](#) are made effective, a timely-filed invoice that is rejected near the IDD will also extend the IDD by 60 days and permit refiling, if appropriate.
 - If it is rejected a second time, you have the right to appeal the decision.
- Appeals must be filed **first** with USAC.
- You have **60 days** to appeal to USAC.
- Appeals filed more than 60 days after the decision date are automatically dismissed, and a waiver must be filed with the FCC.
- If USAC denies the appeal, you have **60 days** to appeal that denial to the FCC.
- Waivers of the Commission's rules, such as the invoice deadline rule, can only be sought from the FCC. An appeal of a timely-filed invoice that is rejected or modified does **not** require a waiver of the invoice deadline rule.
- Additional information on the appeals and waivers is available on [USAC's website](#).

Record Retention and Open Data

Documentation

Ensure adequate documentation is retained for 10 years **after the latter** of the last day of the applicable funding year or the service delivery deadline for the funding request, whichever date is later. Use documentation to:

- Support amounts invoiced to the E-Rate program.
- Demonstrate compliance with FCC rules.
- Demonstrate that the costs of equipment and services requested for E-Rate support were properly allocated between eligible and ineligible items, locations, or recipients of service.
- Detailed [Document Retention](#) requirements are available on USAC's website.



Available for Public Use

Update June 2022

E-Rate Program List of Documents to Retain for Audits and to Show Compliance with Program Rules

E-Rate program rules require program participants to retain all documents demonstrating compliance with the rules for at least 10 years after the latter of the last day of the applicable funding year or the service delivery deadline for the funding request. This list provides guidance regarding the types of E-Rate program documents that should be retained by all program participants – school and library applicants, service providers, and consortia – to comply with FCC audit and [document retention](#) requirements. **Not** all documents may apply to every participant and the list is not an exhaustive list. Service providers should also review this list and “Additional Guidance for Service Providers” later in this document to ensure they retain documentation requested during audits and to demonstrate compliance with E-Rate rules.

FCC FORMS & CERTIFICATIONS		
Document	Applicant	Service Provider
FCC Form 470 (Description of Services Requested and Certification Form)	X	
FCC Form 471 (Description of Services Ordered and Certification Form)	X	
FCC Form 498 (Service Provider and Billed Entity Identification Number and General Contact Information Form)	X	X
FCC Form 472 (Billed Entity Applicant Reimbursement (BEAR) Form)	X	
FCC Form 473 (Service Provider Annual Certification (SPAC) Form)		X
FCC Form 474 (Service Provider Invoice (SPI) Form)		X
FCC Form 479 (Certification by Administrative Authority to Billed Entity of Compliance with the Children's Internet Protection Act Form) consortium members and consortium leaders only	X	
FCC Form 486 (Receipt of Service Confirmation and Children's Internet Protection Act Certification Form)	X	
FCC Form 500 (Funding Commitment Adjustment Request Form)	X	
Delivery confirmations for forms filed outside of EPC (FY2015 and earlier)	X	X

For forms filed in the [E-Rate Productivity Center \(EPC\)](#), you can print/save a PDF copy of forms, notification letters, and correspondence for your records.

Locating Key Invoice Information

Current Invoice Deadline Date and/or Service Delivery Deadline Information

- EPC: The Invoice Deadline Date and Service Delivery Date are included in the Funding Commitment Decision Letter and Revised Funding Commitment Decision Letter.
- Dataset: [E-Rate Request for Discount on Services: FRN Status](#)
 - Column D “form version” field filter should be set to "Current."
 - Disbursement Data: [E-Rate Invoice Disbursements Data Lookup Tool](#)

General Open Data Information and Training

- [Open Data Video Guides](#) and [Open Data Platform](#)
- [E-Rate Tools Page](#)

Key Takeaways

Key Takeaways

- **Invoicing mode selection is the applicant's choice and is made on the FCC Form 471.**
 - Invoices can be submitted until the Invoice Deadline Date.
 - **Only a full rights user can certify forms.**
 - Request a one-time invoice deadline extension, even if you do not anticipate needing one.
 - Only invoice for the specific equipment and services at the quantities and rates approved and only for the **approved** Recipients of Service (ROS) on your FCC Form 471.
 - Ensure you have the accurate FCC Form 471, FRN, FCDL/RFCDL, discount rate, approved cost of service, calculations and invoice amount.
- Remove ineligible items (equipment and services not approved on FCC Form 471, for FY and ROS).
 - Establish a process to prevent duplicate invoice submission.
 - Retain your supporting documentation and bills for all invoices for at least 10 years.
 - Respond in a timely manner to all outreaches to expedite your payment.
 - Parties have 60 days to appeal decisions to USAC and 60 days from the date of the USAC appeal decision to appeal to the FCC. Waivers should be filed directly with the FCC.

Open Data Invoicing Tools

E-Rate Invoice Deadline Tool

- Provides the ability to search, view, and download invoice-related data including invoice filing deadline dates, funds remaining for invoicing, and invoicing mode (e.g., BEAR vs. SPI).
- This tool answers questions such as:
 - How can I check to see the last day to invoice for an FRN and decide if I want to file a 120-day invoice deadline extension?
 - What is my approved funding commitment and is my FRN ready for Invoicing? (FCC Form 473 status, FCC Form 486 status)

View the [training video](#) to learn more about this tool.

E-Rate Invoice Disbursements Data Lookup Tool

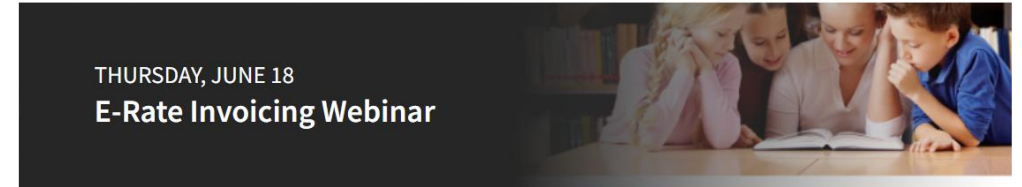
- The E-Rate Invoices and Authorized Disbursements (FCC Forms 472 and 474) dataset provides invoice-related data to track invoice lines completed and authorized for disbursement.
- This tool answers questions such as:
 - What activity has happened on my invoice this quarter?
 - Why was my invoice reduced?

View the [training video](#) to learn more about this tool.

E-Rate Resources

- [E-Rate Tools Page](#) (Open Data info)
- [E-Rate “Learn” section](#) on USAC.org
 - Videos and eLearning Modules (eLMs)
 - Webinar slides and video recordings
 - E-Rate News Brief
 - FAQs
 - E-Rate Training Information
 - EPC Training Site

Learn



Learn more about the E-Rate program.



Videos

USAC's videos are designed to help you understand and manage the filing process, FCC requirements, and other elements of the E-Rate program.

[Browse our Videos](#)



Webinars

Join USAC for live training webinars provided throughout the year for E-Rate program participants, and watch recordings of those you may have missed.

[View our Webinars](#)



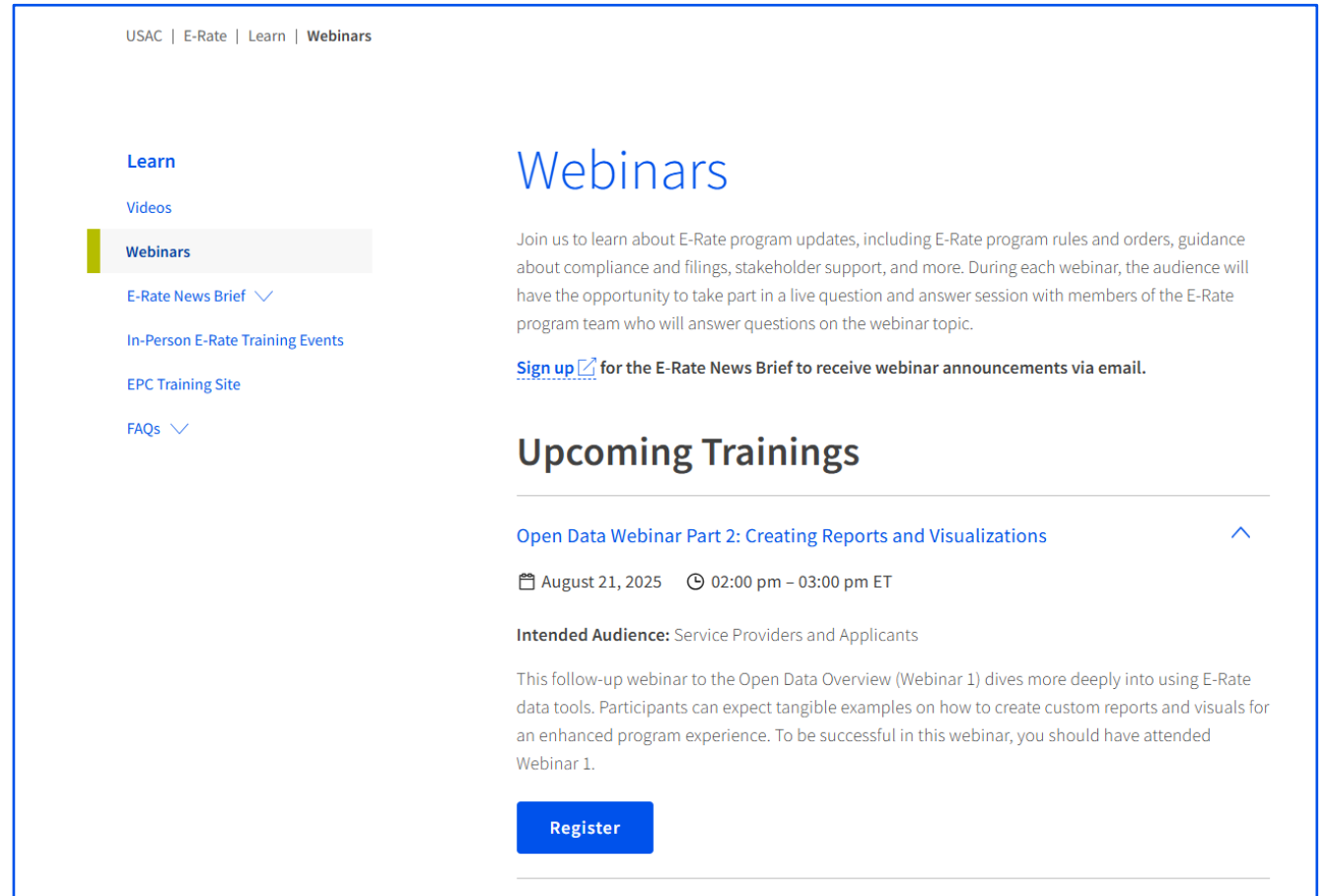
E-Rate News Brief

The E-Rate News Brief gives you details about upcoming funding commitments, application process tips, and other timely information. Be sure to [subscribe](#).

[Consult our News Brief](#)

E-Rate Tools and Resources: Webinars

- Online training
- Opportunities for Q&A
- Recordings available on the Webinar page of E-Rate's website.
- Hosted throughout the year.
- The Webinars page is accessible [here](#).



The screenshot shows the 'Webinars' page on the USAC E-Rate website. The page has a navigation menu on the left with options: Learn, Videos, Webinars (highlighted), E-Rate News Brief, In-Person E-Rate Training Events, EPC Training Site, and FAQs. The main content area features a 'Webinars' heading, a paragraph about joining to learn about E-Rate program updates, and a 'Sign up' link for the E-Rate News Brief. Below this is a section for 'Upcoming Trainings' with a card for 'Open Data Webinar Part 2: Creating Reports and Visualizations' scheduled for August 21, 2025, from 02:00 pm to 03:00 pm ET. The intended audience is 'Service Providers and Applicants'. A 'Register' button is located at the bottom of the card.

USAC | E-Rate | Learn | Webinars

Learn

Videos

Webinars

E-Rate News Brief ▾

In-Person E-Rate Training Events

EPC Training Site

FAQs ▾

Webinars

Join us to learn about E-Rate program updates, including E-Rate program rules and orders, guidance about compliance and filings, stakeholder support, and more. During each webinar, the audience will have the opportunity to take part in a live question and answer session with members of the E-Rate program team who will answer questions on the webinar topic.

[Sign up](#) for the E-Rate News Brief to receive webinar announcements via email.

Upcoming Trainings

[Open Data Webinar Part 2: Creating Reports and Visualizations](#) ^

📅 August 21, 2025 ⌚ 02:00 pm – 03:00 pm ET

Intended Audience: Service Providers and Applicants

This follow-up webinar to the Open Data Overview (Webinar 1) dives more deeply into using E-Rate data tools. Participants can expect tangible examples on how to create custom reports and visuals for an enhanced program experience. To be successful in this webinar, you should have attended Webinar 1.

[Register](#)

E-Rate Tools and Resources: News Brief

- Provides reminders, updates, tips and tricks.
- Sent monthly via email.
- Subscribe [here](#).

Available for Public Use

Universal Service Administrative Co. E-Rate

E-Rate News Brief

July 24, 2025

Contents

- [E-Rate Tips](#)
- [Funding Year \(FY\) 2025 Commitments](#)
- [Prepare for the Upcoming Competitive Bidding and FCC Form 470 Process](#)
- [FCC Form 470 Reminders](#)
- [Update to E-Rate Open Data Download Instructions](#)
- [Learn About USAC's Beneficiary and Contributor Audit Program](#)
- [2025 Training and Outreach](#)

E-Rate Tips

- As a reminder, **Funding Year (FY) 2025 applicants who have received a funding commitment** from USAC and whose services have started can certify an [FCC Form 486](#) (Receipt of Service Confirmation and Children's Internet Protection Act Certification Form) to inform USAC that services have started. Subsequently, invoicing can begin.
- **Service providers are required to submit and certify an annual FCC Form 473** (Service Provider Annual Certification (SPAC) Form). USAC cannot pay an invoice from either an applicant (FCC Form 472/BEAR) or a service provider (FCC Form 474/SPI) **unless both the FCC Form 486 and the FCC Form 473 have been certified and approved for FY2025 funding requests**. See [last month's news brief](#) for filing requirements.
- **Visit our updated webpages** including [FCC Form 470 Filing](#), [How to File FCC Form 472 in EPC](#), and [How to File the FCC Form 474 in EPC](#).

Funding Year (FY) 2025 Commitments

FY2025. USAC released FY2025 Wave 13 Funding Commitment Decision Letters (FCDLs) on July 17. As of July 23, FY2025 commitments total over \$1.54 billion.

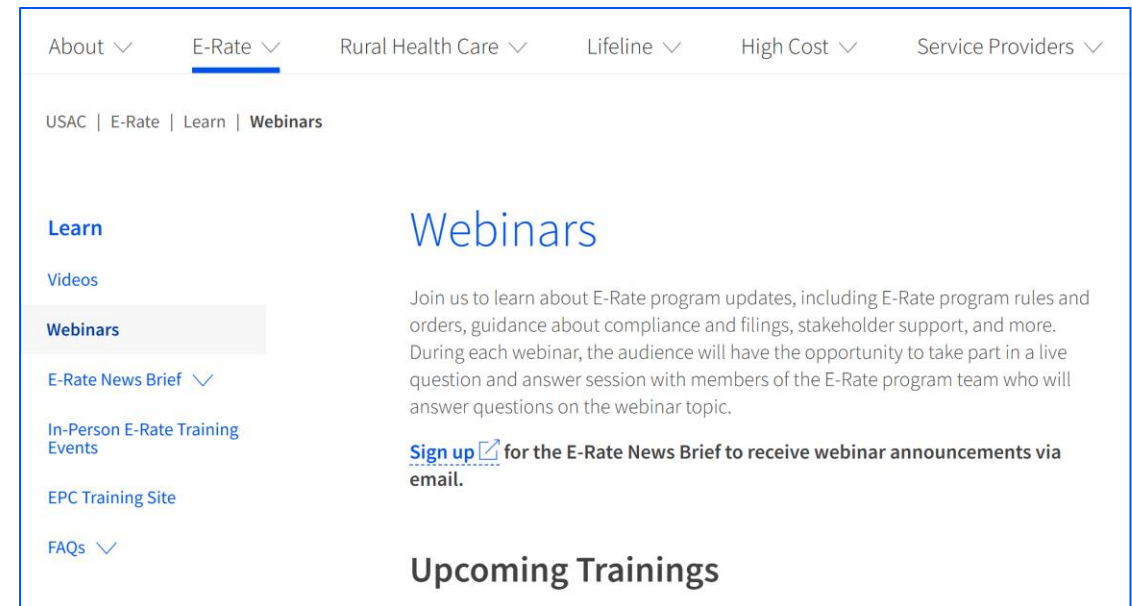
July 2025 E-Rate News Brief Page 1 of 6

Other Resources

- [Prepare to Invoice](#)
- [E-Rate Tips to Speed Up Disbursements](#)
- [Applicant Invoicing](#)
- [Service Provider Invoicing](#)
- [Applicant 498ID](#)
- [Webinars & Trainings](#)
- [E-Rate News Brief](#)
- [SPI Invoice Submission Demo](#)
- [BEAR Invoice Submission Demo](#)
- [Glossary of Terms](#)
- [EPC Invoice Process](#)
- [Practice Forms](#)

Upcoming Webinars

- Open Data Webinar Part 2: Advanced Topics - Creating Reports and Visualizations is on **June 25**
 - Recommended for applicants and service providers
 - Suitable for all E-Rate experience levels
- Please visit the E-Rate [Webinars](#) page for additional information.




The screenshot shows the E-Rate Webinars page. The navigation bar includes links for About, E-Rate (selected), Rural Health Care, Lifeline, High Cost, and Service Providers. The breadcrumb trail is USAC | E-Rate | Learn | Webinars. The left sidebar contains a 'Learn' section with links for Videos, Webinars (highlighted), E-Rate News Brief, In-Person E-Rate Training Events, EPC Training Site, and FAQs. The main content area features the heading 'Webinars' and a paragraph: 'Join us to learn about E-Rate program updates, including E-Rate program rules and orders, guidance about compliance and filings, stakeholder support, and more. During each webinar, the audience will have the opportunity to take part in a live question and answer session with members of the E-Rate program team who will answer questions on the webinar topic.' Below this is a 'Sign up' link with an external icon, followed by the text 'for the E-Rate News Brief to receive webinar announcements via email.' At the bottom of the main content area is the heading 'Upcoming Trainings'.

Live Q&A

Submit your questions
about today's topics:

- Invoicing Overview
- Preparing to Invoice
- SAM.gov / UEI / Filing an FCC Form 498
- Filing an Invoice
- Invoice Reviews
- Record Retention and Open Data
- Key Takeaways

Questions ×



No questions yet

Questions you send and answers from the staff
will appear here

Enter your question

Your question will be sent to staff Send

Q&A Tips

- ✓ Type your queries into the “Questions” box in your webinar control panel.
- ✓ Write in full sentences.
- ✓ Ask one question at a time.
- ✓ Click the box to expand it and see all the written answers.

Questions?

E-Rate Customer Service Center (CSC)



Call us at (888) 203-8100

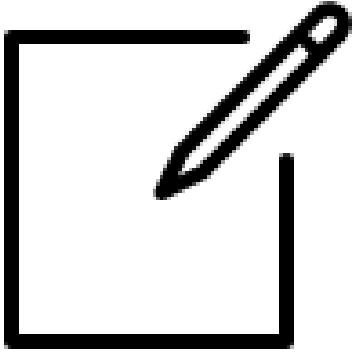
Monday – Friday 8 a.m. to 8 p.m. ET



Create a customer service case

1. Log in to the [E-Rate Productivity Center \(EPC\)](#)
2. Select the **Contact Us** link from the upper right menu on the landing page.

Share Your Thoughts



- We want to hear about your webinar experience.
- A survey will appear on your screen at the end of the webinar.
- If you are not able to complete the survey today, a link to it will be emailed to you within two business days.
- We appreciate your feedback!

Thank You!





Universal Service
Administrative Co.