

# E-Rate Invoicing Process

E-Rate Office Hour

July 21, 2022



Universal Service  
Administrative Co.

# DISCLAIMER

To accommodate all attendees, real-time closed captions will be present during this presentation. This is a new feature we are testing out to improve webinar accessibility for all. We understand it is a significant change and appreciate your patience. We apologize in advance for any transcription errors or distractions. Thank you for your support.

# Housekeeping – Webinar Panel

- The webinar panel is located on the right-hand side of the screen.
- Open the panel by clicking the orange arrow.

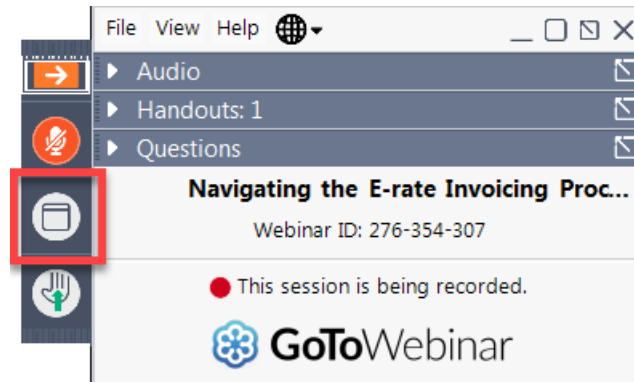


- Use the white arrows to open the sections in the panel.

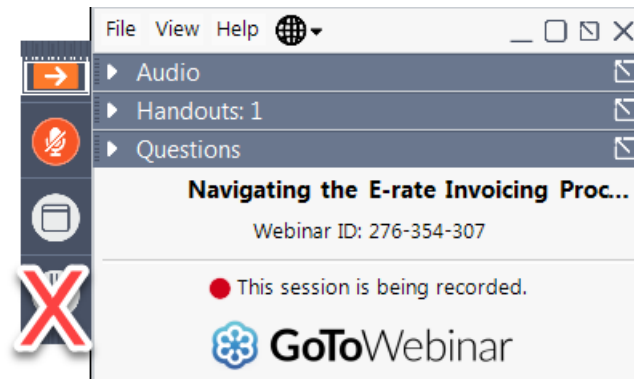


# Housekeeping – Webinar Panel

- You can use the panel to view the presentation in full screen or window mode.

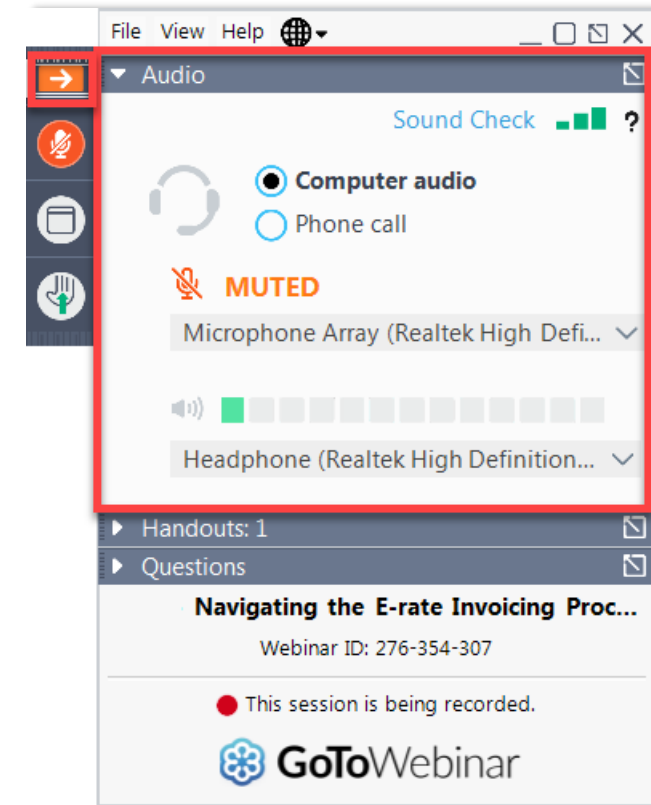


- We are not using the hand raise function.



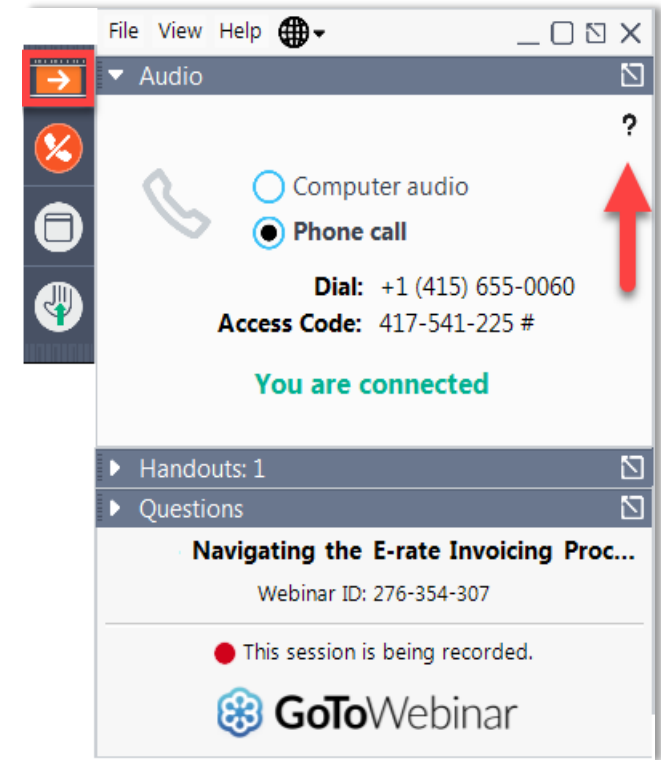
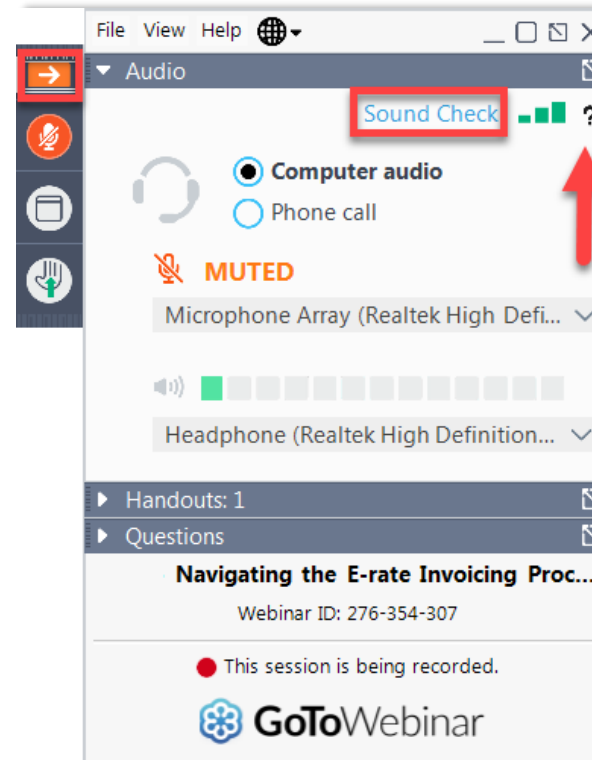
# Housekeeping – Audio

- Use the “Audio” section of your control panel to select an audio source.
- Choose one of the audio options:
  - Your computer's audio
  - Call in using an access code and audio PIN.
- The audience will remain on mute.



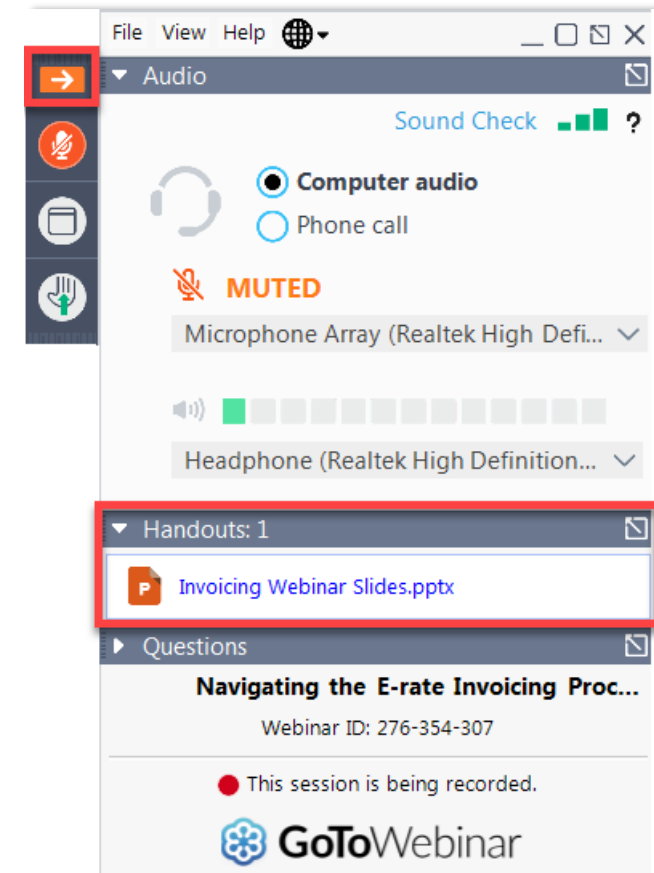
# Housekeeping – Technical Issues

- Use the “Sound Check” link and click question mark icon for audio help.
- Exit webinar and click the check system requirements link in the event confirmation email to determine whether your computer meets the requirements to see and hear the webinar.
- If issues persist, call 833-851-8340 to troubleshoot with GoToWebinar.



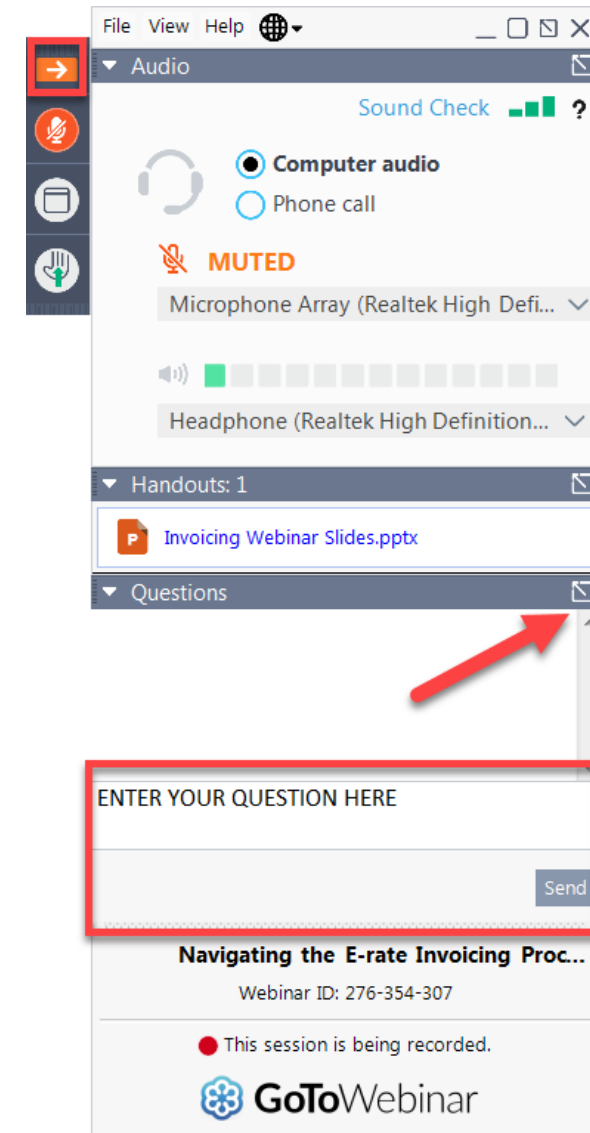
# Housekeeping- Resources

- The **slide deck** is available when you click the arrow to expand the “**Handouts**” tab.
- A recording of this webinar will be available after the event via the registration link.



# Housekeeping Q & A

- **There will be a live Q&A session focused on today's topics.**
- Tips for submitting questions:
  - Use the “Questions” box in your webinar control panel anytime during the presentation.
  - Click the box with the arrow above the questions box to expand it and see all written answers.
  - Write in full sentences.
  - Ask one question at a time.
  - Ask questions related to webinar content.





# 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 in the [E-Rate Productivity Center \(EPC\)](#):**

1. Log in to EPC.
2. Select the **Contact Us** link from the upper right menu on the landing page.

# Meet Our Team



**Samantha Jones**

Sr Program Analyst , Invoicing | E-Rate program



**Nkeshi Free**

Communications Specialist | E-Rate program

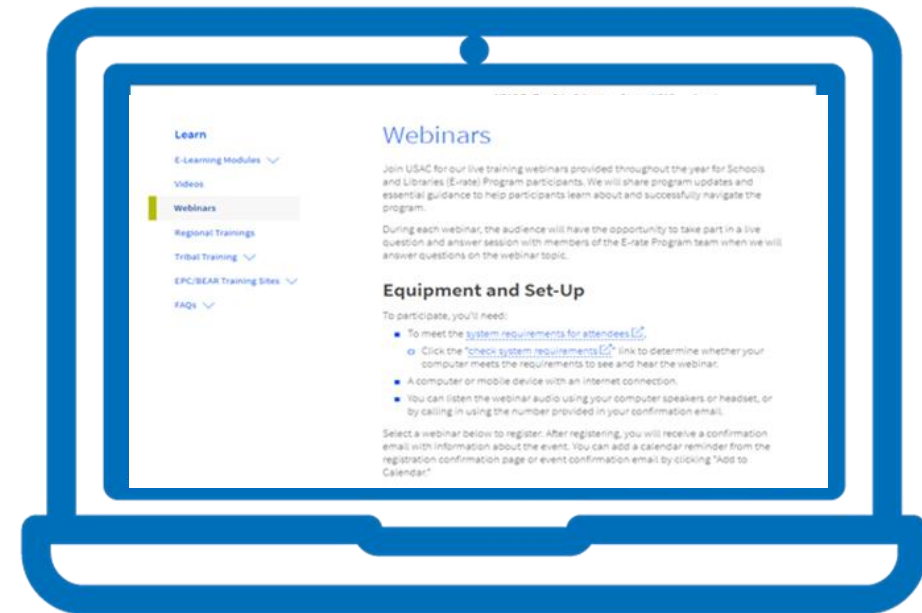
# Agenda

- Office Hours Overview and Purpose
- Office Hour: Prerequisites
- Invoicing Overview
- Invoicing Reminders & Key Takeaways
- Resources for Invoice Filing
- Q & A

# Office Hours Overview

# Office Hour Webinar and Training Series

- Provide targeted program information.
- Assist program participants with timely and topic relevant questions.
- Equip program participants with knowledge about E-Rate resources.
- Recommended for: Applicants and service providers
- E-Rate experience level: All



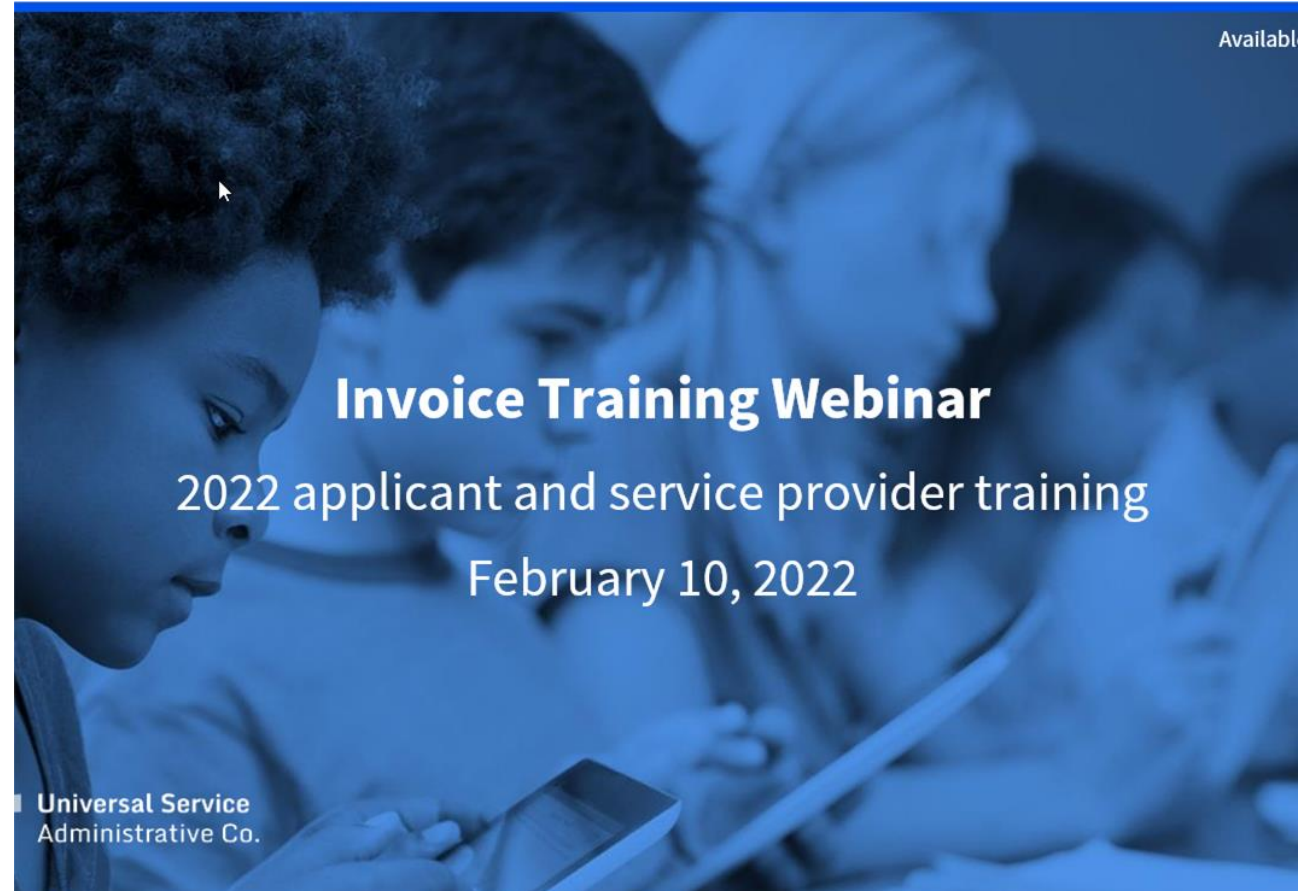
# Office Hour Webinar and Training Series

- USAC team members will provide a high level overview of the topic materials.
- Participants should read the assigned materials and watch assigned videos in advance of the webinar event and come prepared with questions to ask during the Q & A session.
- Questions related to the topics and experience level will be given priority.

# Office Hours Prerequisites

# Office Hour: Prerequisites

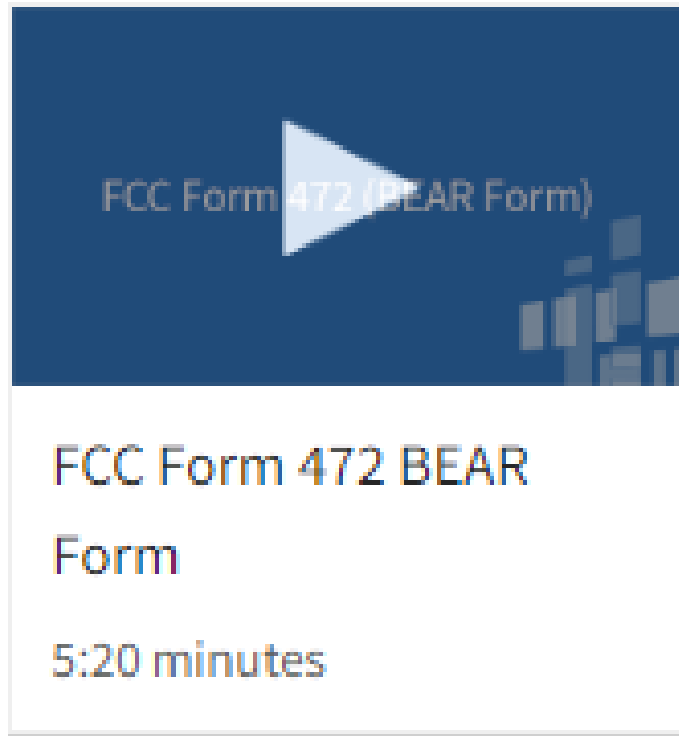
- [E-Rate Invoicing Webinar](#)



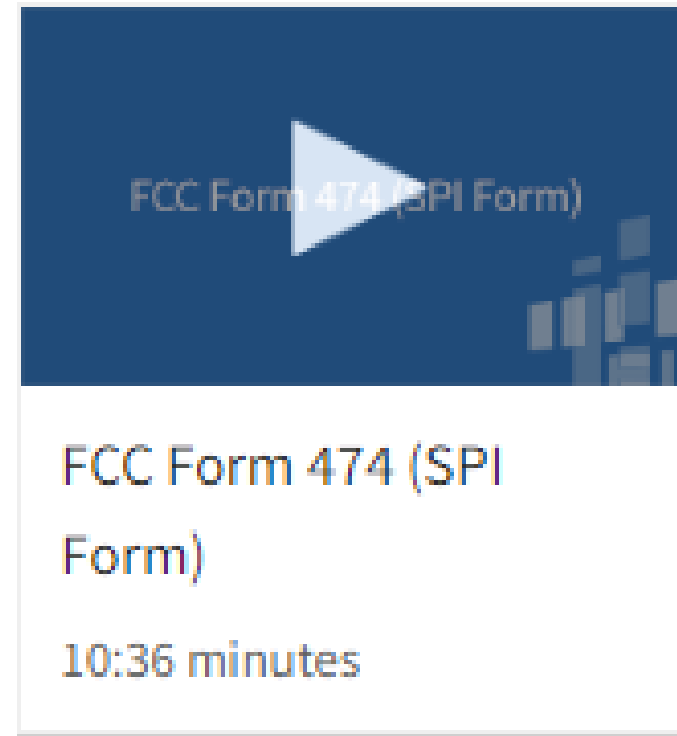


# Office Hour: Prerequisites

## [FCC Form 472 BEAR Form](#)

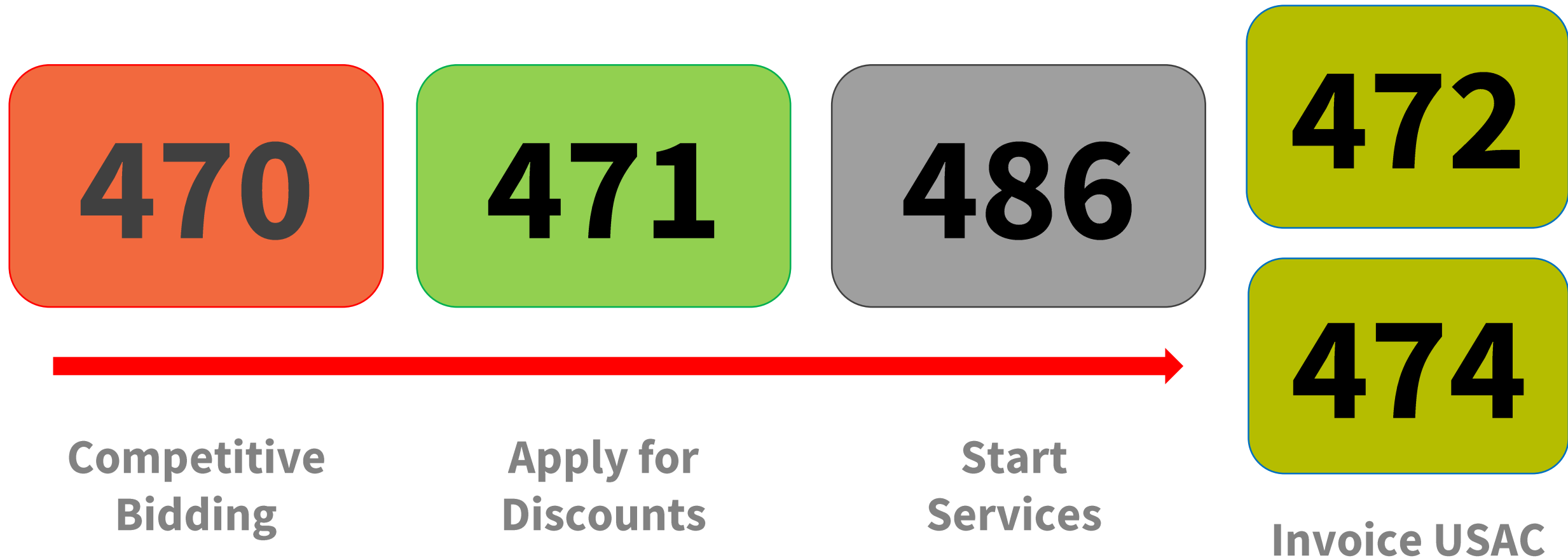


## [FCC Form 474 \(SPI Form\)](#)



# Invoicing Overview

# What is the applicant process?



# Invoicing Reminders & Key Takeaways

- Ensure you have the **accurate FCC Form 471**: FRN, 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).
- Respond to all outreach **completely and timely** to expedite your payment.
- To **prevent duplicate** invoice submission, establish a process to track/identify each invoice.
- Retain your [supporting documentation](#) and bills for all invoices for at least **10 years**.
- Make sure all equipment purchased is **installed and in use before the Service Delivery Date**.
- Invoices may be submitted until **Invoice Deadline Date** or request a **one-time invoice deadline extension**.
- **Appeals** must be submitted to USAC within **60 days** of the date when USAC issued the decision. Waivers should be filed directly with the FCC.

# Invoicing Reminders & Key Takeaways

- Payments:
  - **BEAR Invoices:** Applicant has paid service provider **in full and before invoicing E-Rate**.
  - **SPI Invoices:** Applicant pays the service provider their non-discounted portion. Service Providers should **bill** their customers for:
    - 1: the **non-discounted** portion of costs for the approved eligible equipment/services and
    - 2: any costs for the **ineligible** portions of products/services before submitting the FCC Form 474.
- Ensure you **file for BMIC services correctly**. Mistakes are often identified during invoicing. See our [FAQs](#) on how to fix misclassified equipment and services on your 471.
- **Invoice USAC only for your FCC Form 471 approved eligible equipment/services, in the correct quantity and rates, and delivered only to the approved ROSs.**
- Ensure the speed is properly listed under the approved FRN. If you're using a flexible bandwidth speed, ensure you are using the min/max field on the FCC Form 471.
- Invoiced amount must be **actual charges**, not the amount committed through the E-Rate program.
- Check your manual calculations (e.g., your **prorated amounts must be accurate**).
- Billed rates must **not exceed the contracted rate**. USAC will only pay up to the contracted rate.

# Resources

# Resources: Filing an Invoice

## Detailed Invoicing Links

- [FCC Form 472/BEAR](#)
- [BEAR Training Video](#)
- [BEAR Form Filing Guide](#)
- [BEAR Training Site](#)
- [FCC Form 474/SPI](#)
- [SPI Training Video](#)
- [SPI Form Filing Guide](#)
- [FCC Form 474 filing](#)

## Related Links

- [BMIC FAQs](#)
- [Open Data](#)
- [498ID](#)
- [Webinars & Training](#)
- [E-Rate News Brief](#)

# Resources: Locating Key Invoicing Information

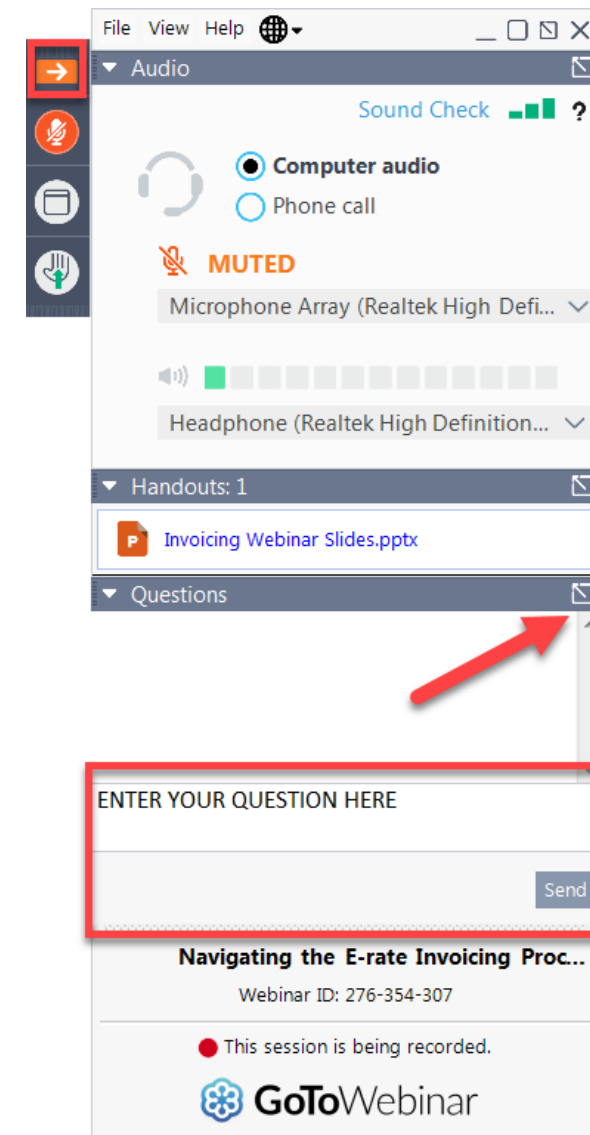
Invoice Deadline Date (IDD) and/or Service Delivery Date (SDD) Information

- EPC: The IDD and SDD are included in the FCDL and RFCDL.
- 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 & Training
  - [Open Data video guides](#) and [Open Data platform](#)



# Housekeeping – Q&A

- Use the “Questions” box in your webinar control panel to submit your question in writing.
  - Click the box with the arrow above the questions box to expand it.
  - Ask questions related to webinar content.



# Questions?

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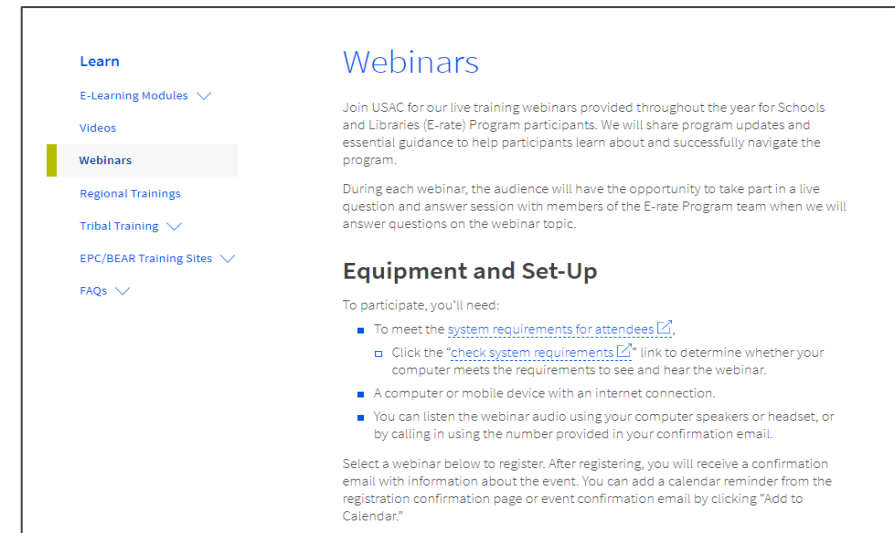
**Create a customer service case in the [E-Rate Productivity Center \(EPC\)](#):**

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# Upcoming Webinars

Check the **E-Rate Webinars** page for updates on future webinars.

For additional information subscribe to the [E-Rate News Brief](#)



The screenshot shows a web page with a left sidebar and a main content area. The sidebar has a 'Learn' header and a list of links: 'E-Learning Modules', 'Videos', 'Webinars' (highlighted with a yellow bar), 'Regional Trainings', 'Tribal Training', 'EPC/BEAR Training Sites', and 'FAQs'. The main content area has a 'Webinars' header. Below it, a paragraph states: 'Join USAC for our live training webinars provided throughout the year for Schools and Libraries (E-rate) Program participants. We will share program updates and essential guidance to help participants learn about and successfully navigate the program.' Another paragraph follows: '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 when we will answer questions on the webinar topic.' Below this is a section titled 'Equipment and Set-Up'. It starts with 'To participate, you'll need:' followed by a list of requirements: 'To meet the system requirements for attendees', 'Click the "check system requirements" link to determine whether your computer meets the requirements to see and hear the webinar.', 'A computer or mobile device with an internet connection.', and 'You can listen the webinar audio using your computer speakers or headset, or by calling in using the number provided in your confirmation email.' At the bottom, a paragraph says: 'Select a webinar below to register. After registering, you will receive a confirmation email with information about the event. You can add a calendar reminder from the registration confirmation page or event confirmation email by clicking "Add to Calendar."'.

**Learn**

- E-Learning Modules
- Videos
- Webinars**
- Regional Trainings
- Tribal Training
- EPC/BEAR Training Sites
- FAQs

## Webinars

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### Equipment and Set-Up

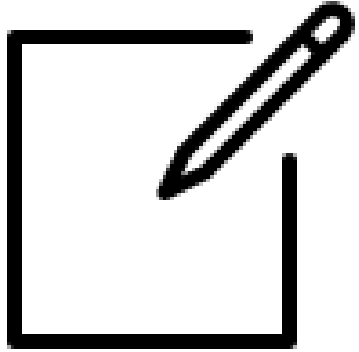
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Go to the E-Rate [Webinars](#) page for additional information.

# Take Our Survey



- We want to hear about your webinar experience.
- A brief survey will appear at the end of this webinar
- A second chance survey link will also arrive in your inbox in 1-2 business days.
- We appreciate your feedback!

**Thank You!**





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