Use

E-Rate System Consolidation Training Launch

Program Participant Webinar

October 04, 2023

Universal Service Administrative Co.

Disclaimer

To accommodate all attendees, real-time closed captions will be present during this presentation. We apologize in advance for any transcription errors or distractions. Thank you for your support.

Housekeeping

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- The audience will remain on mute.
- Enter questions at any time using the "**Questions**" box.
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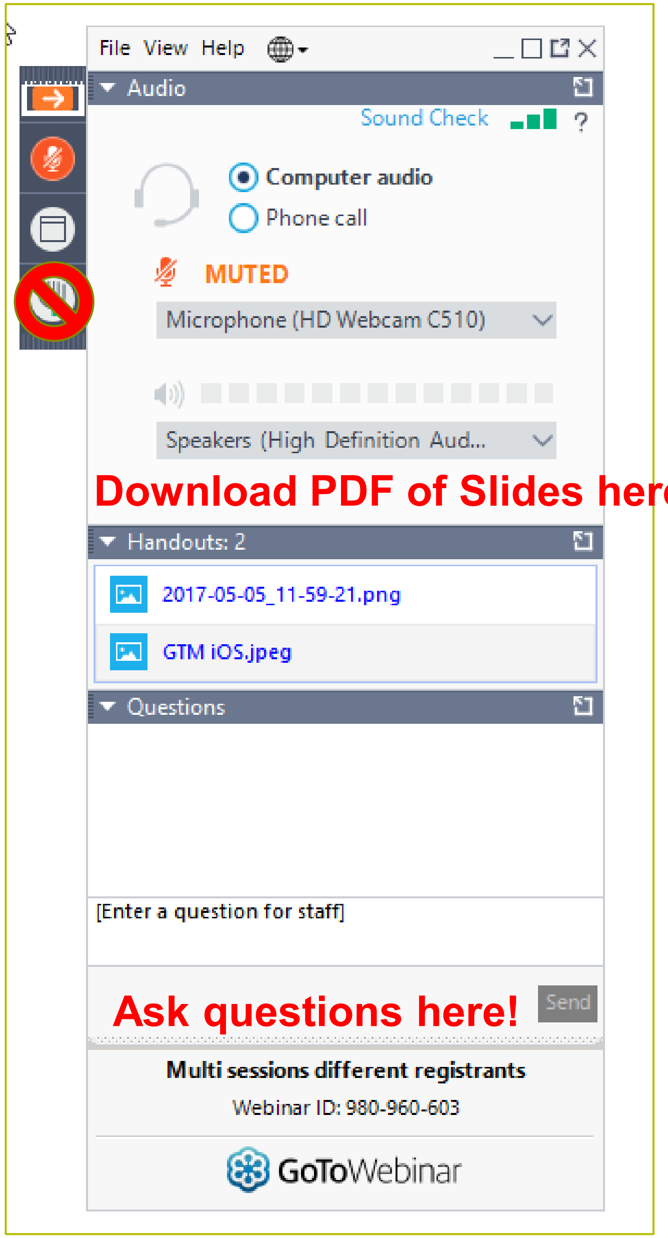
- A copy of the slide deck is in the "**Handouts**" section of webinar panel.



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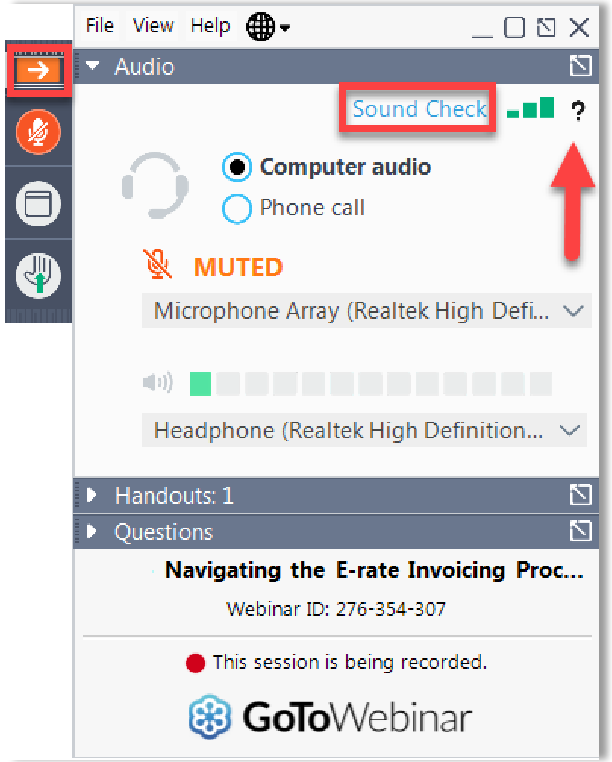
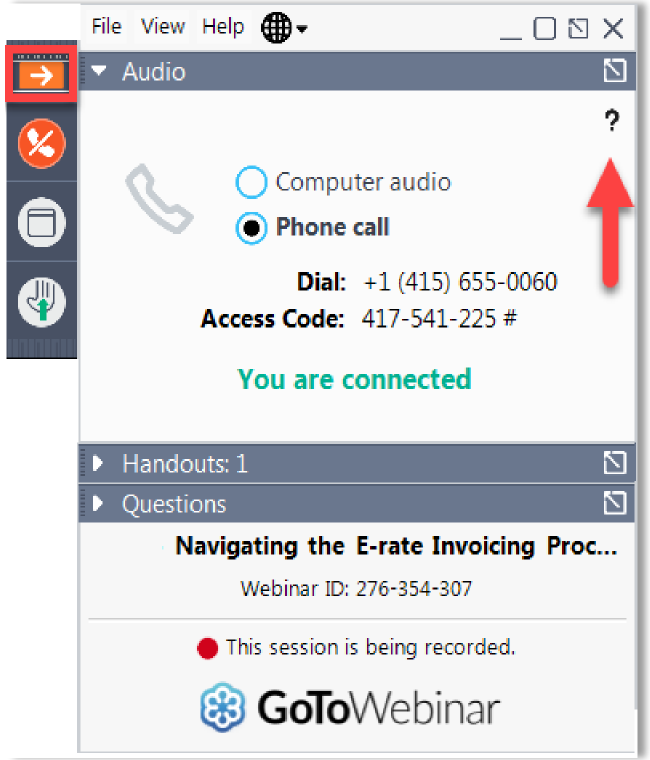
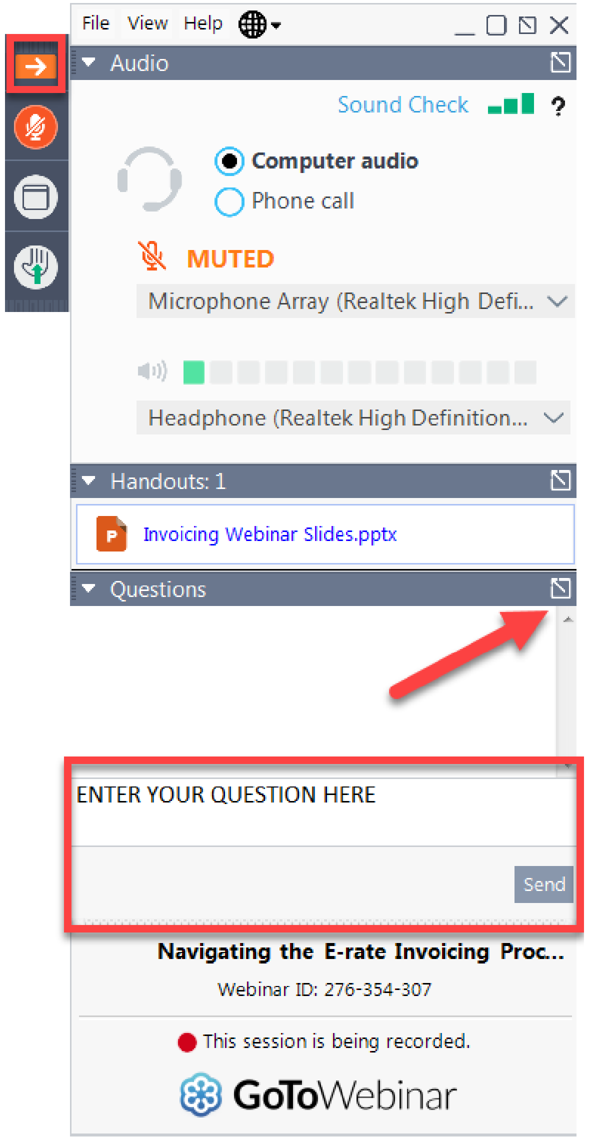




Housekeeping Q & A

- **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 THE TEAM

Catherine Willis

Senior Director | E-Rate

Allison Kahan

Program Analyst | E-Rate

Agenda

- System Consolidation Is Going Live
- How We Will Support You
- Electronic Learning Modules
- Webinars and Office Hours
- Key Dates
- Resources
- Q & A

System Consolidation Is Going Live

Go Live Countdown

- The last date to submit invoices in Legacy is **October 30.**
- Start submitting invoices in EPC on **November 7.**
- Any open invoices in Legacy after **October 30** will be moved into EPC

Scope of Change

Changing

- User interface changes to the interface used in EPC.
- Notifications about invoice submission status delivered to your News Feed in the EPC.
- Inquiries from USAC about your Invoice Submissions available via the EPC.
- Reply and add attachments in EPC.
- Financial Year (FY) 2015 and earlier invoice submissions via customer service case.

Not Changing

- E-Rate Invoice program processes and rules.
- Information and documentation submitted.
- Eligibility of equipment and services.
- Disbursements continue to be made twice a week.

How We Will Support You

System Consolidation Support

- Today we announce the launch of the Invoicing **Electronic Learning modules (eLMs)**, which are available via the **Learn** page.
- These trainings will assist applicants and service providers with making a smooth transition to Invoicing within EPC
- For additional support, USAC offers a series of **office hour sessions**, targeted to Applicants or Service Providers, after completion of the eLMs.
- Support is also available via the website, with content updates and Special Edition **System Consolidation** News Briefs

Electronic Learning Modules (ELMs)

To support the consolidation effort, this new format:

- Features applicant-specific and service provider specific offerings
- Supports different learning styles
- Is interactive
- Focuses on ensuring comprehension and retention of concepts
- Allow word search and content search

Invoice Status Overview

Comprehensive Visuals

Incomplete	An Invoice has been **created but not certified**
Certified	The invoice has been submitted and certified and **one or more invoice lines have yet to be processed** by USAC
Processed	**All lines of the invoice** have been **processed and paid**
Cancelled	The invoice has been **discarded before submission** OR has been **cancelled after it was submitted and certified**

Methods for Checking Invoice Status

	Invoice Status	Invoice Line Status	View Unpaid Invoice Status	View Paid Invoice Status	View Status of SPI Invoice	View Multiple Invoices/Lines
EPC E-Rate Invoicing Dashboard	✓	✓	✓	✓	✗	✗
Invoice Line Summary Status Report	✓	✓	✓	✓	✗	✓
Open Data Disbursement Lookup Tool	✓	✓	✗	✓	✓	✓

Addresses All Learning Types

One Stop Shop for Resources

Resources

- ✓ Applicant Process
- ✓ E-Rate Resources
- ✓ E-Rate Invoice Disbursements Data Lookup Tool
- ✓ Invoice Decision Code Table
- ✓ E-Rate Webinars

- ✓ **Customer Service Center (CSC)**
  - ✓ Call us at (888) 203-8100
  - ✓ Monday - Friday 8 a.m. to 8 p.m. EST
  - ✓ Create a customer service case in EPC

Additional Web Based Trainings for EPC Invoicing:

- ✓ Course 1: EPC Invoicing: Submitting and Certifying Invoices for Applicants
- ✓ Course 3: EPC Invoicing: Outreach and System Notifications for Applicants

Resources: Quick Click Guides

E-Rate Invoicing Requirements Guide

This guide is reminder of what steps must be taken for invoicing submission, and where to find information about those steps in EPC and/or the FRN Status Tool in OpenData. If you're trying to start the invoicing process, but can't select your FRN in EPC, it is because the FRN is not eligible for invoicing per one or more of the E-Rate program rules. listed below.

Use this table to research the reason(s) your FRN isn't currently available for invoicing due to E-Rate program rules. Open Data Tips: Download in FRN Status Tool by selecting Funding Request Number from the dropdown menu and entering your FRN. Click Export, filtered data, and CSV for Excel, then open the excel file.

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BEFORE INVOICING		
Requirement	**Description**	**Location**
Your FRN Is Committed	FRN that has received funding	EPC > **Records** tab > Click **FRN Cases** > Enter **FRN** > Click **Search Review Status Field** OR **FRN** Status Tool > Open **downloaded file** > View **Funding Request Status** (column K)
FRN Is for FY2016 or Later	FRNs must have been assigned in the year 2016 or later. The first two digits of your FRN is the year assigned.	Within Your Own Records
Funding Is Available	Funds that remain from the committed amount, minus any disbursed amount.	FRN Status Tool > Open **downloaded file** > Subtract **Total Disbursement** (column AQ) from **View Funding Commitment Request** (column AA)
Prevent Duplicates	Prevent duplicate invoice submissions by establishing a process to track each invoice.	Within Your Own Records
Invoicing Period Is Valid	Invoicing must occur after the services have started or been delivered, but before the invoicing deadline. Please view link for details: https://www.usac.org/rural-health-care/healthcare-connect-fund-program/step-6-invoice-usac/	**Invoicing Deadline:** EPC > **Records tab** > Click **Funding Requests** > Enter **FRN** > Click **SEARCH** > Click **Summary** tab > View **Invoicing Deadline Date** **Service Start Date:** FRN Status Tool > Open **downloaded file** > View **Service Delivery Deadline** (column N) (Blank cell= service hasn't started yet)
FCC Form 486 Is Approved for the FRN	A certified FCC Form 486 is required from Applicants before invoicing can begin. It's used to notify USAC that services have started for the recipients and show that you're compliant with the Children's Internet Protection Act (CIPA) for the recipients of service for the FRN(s). Please view link for details: https://www.usac.org/e-rate/ applicant-process/starting-services/fcc-form-486-filing/	**To View FCC Form 486:** EPC > **Records** tab > FCC Form 486 **To View FCC Form 486 Deadline:** EPC > **Records** tab > Click **Funding Requests** > FCDL Comments **To View FCC Form 486 Status:** FRN Status Tool > Open **downloaded file** > View **FCC Form 486 Status** (column AD)
FCC Form 498 Not Filed (BEAR or SPI)	This form is filed through EPC after certification. If the form isn't filed, invoicing can't be processed.	EPC > **Records** tab > Click **FCC Forms 498** > Enter **498 ID** > Click **SEARCH**

Resources: Quick Click Guides

E-Rate
EPC NAVIGATION REFERENCE GUIDE

This table provides details about where to compete the steps of the invoicing process on the EPC invoicing page. Many of these paths are completed using the My Organization, My Forms and Requests, and My Pending Tasks tabs. For more details on these steps, refer to the training module location provided.

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		EPC Invoicing Dashboard Tab	Alternative Path	eLM Location
SUBMITTING	Submit the BEAR/472 FY16 or later	**My Organization** tab > Locate **Billed Entity Number (BEN)** > Click **File FCC Form 472/BEAR**		Applicant Course 1 > Module 2
	Submit the SPI/474	**My Organization** tab > Locate **SPIN number** > Click **File FCC Form 474/SPI**		SP Course 1 > Module 2
	Submit deadline extension requests	**My Organization** tab > Locate **BEN number** > Click **… dropdown** > Click **Invoice Deadline Date Extension Request**	**My Forms and Requests tab** > Locate **BEN number** > Click **… dropdown** > **Click Invoice Deadline Date Extension Request**	Applicant Course 2 > Module 2 SP Course 3 > Module 2
	View/Change Access		Log into EPC > Click **Manage User** > Check appropriate BEN > Click option below	Applicant /SP Course 1 > Module 2 SP Course 1 > Module 2
	Certify a pending BEAR/472/474	**My Forms and Requests tab** > Locate **BEN number** > Click **FCC Form 472 number** > Click **CERTIFY**	**My Pending Tasks** tab > Locate Task name > Click the task > Click **CERTIFY**	Applicant Course 1 > Module 2 SP Course 1 > Module 2
REVIEWING	Respond to outreach	**My Forms and Requests tab** > Locate **BEN number** > Click **FCC Form 472 number** > **Related Actions** tab		Applicant Course 2 > Module 2 SP Course 3 > Module 2
	See actions needed for invoice	**My Forms and Requests tab** > Locate **BEN number** > Click the **FCC Form 472 number** > **Invoice Line-Item** tab	**My Pending Tasks** tab > Locate **BEN number** > Click **FCC Form 472 number** > **Invoice Line-Item** tab	Applicant Course 2 > Module 2 SP Course 3 > Module 2
	View Status of a Line	**My Forms and Requests tab** > Locate **BEN number** > Click **FCC Form 472 number** > **Invoice Line-Item** tab		Applicant Course 2 > Module 2 SP Course 3 > Module 2
	See what has not been certified	**My Forms and Requests tab** > Locate BEN number > Click **FCC Form 472 number > Invoice Line-Item** tab		Applicant Course 2 > Module 2 SP Course 3 > Module 2

Resources: Course Summary One Pager

E-Rate
EPC Invoicing Applicant Course 1 Summary

Below is a collection of the key points from Applicant Course 1: Submitting & Certifying Invoices in EPC. These images review important concepts or locations in EPC. For more details, please access the training here https://www.usac.org/e-rate/learn/videos/#EPC-Invoicing-for-Applicants

COURSE OBJECTIVES
- Successfully navigate through the EPC system
- File FCC Form 472 BEAR
- And Certify FCC 472 BEAR

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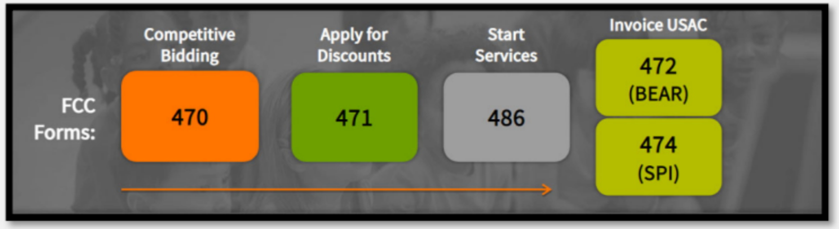
This graphic provides an overview of each step of the E-Rate process and the forms associated with them



This graphic shows the three user permission levels and what each is able to do

	View Invoices	Create Invoices	Certify Invoices	View Outreach	Respond to Outreach
Full	✓	✓	✓	✓	✓
Partial	✓	✓		✓	
View Only	✓			✓	

This graphic has the steps you need to take to complete the invoicing process

1 COLLECT Information
- ✓ Ensure you have the accurate FCC Form 471 and locate your:
  - ✓ FRN
  - ✓ Discount Rate
  - ✓ Approved Services/Equipment
  - ✓ Approved Cost and Quantities
- ✓ Locate the approved Recipients of Service (ROS) for the FRN

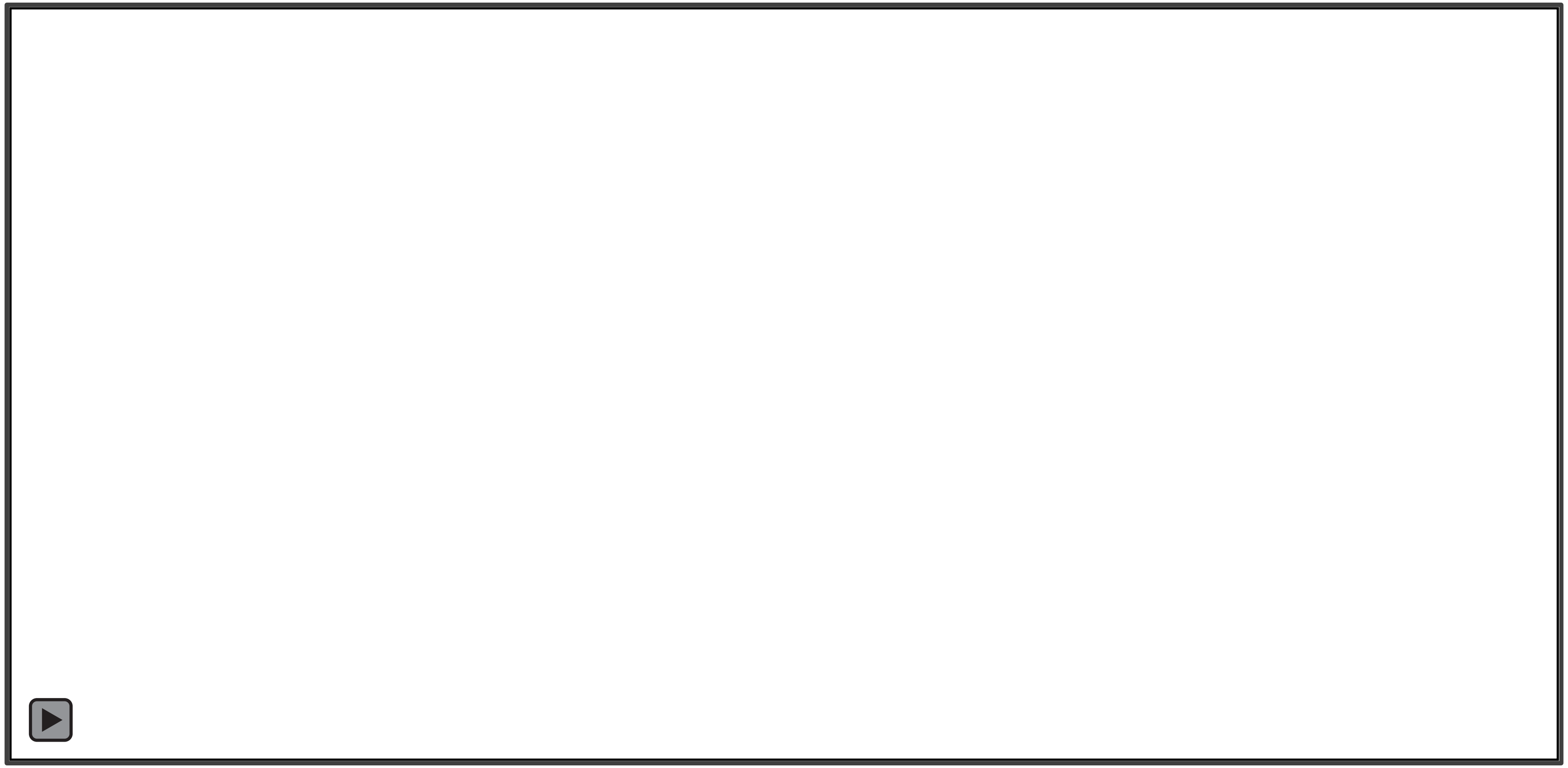
2 CALCULATE Invoice Amount
- ✓ Invoiced amount must be actual charges
- ✓ Calculate total undiscounted amount for each line
- ✓ Remove ineligible items

3 DOCUMENT and Track Invoices
- ✓ Establish a process to track/ identify each invoice
- ✓ Retain your supporting documentation for 10 years

This table has details on what is and is not changing in the new EPC invoicing system

What is Changing?	What is Not Changing?
✓ How/where system access is established	✓ Invoicing processes and rules
✓ Invoicing Submissions	✓ Disbursements will still occur on a twice weekly basis
✓ Service Provider Annual Certification (SPAC)	
✓ Publicly visible fields	
✓ Invoicing Notifications and Outreach	
✓ FY15 and earlier invoice submission	
✓ FY16 and later invoices in progress at the time of consolidation	

Easy to Navigate



Applicants eLMs Overview

Audience	Public or private schools (K-12), libraries, and groups of schools and libraries (e.g., consortia, districts, systems) who are eligible for E-Rate program support.
Delivery Method	WBT (Web-Based Training)
Number of Courses	3
Time to complete each course	~50-60 minutes
Instructor Materials	Articulate Storyline
Program Introduction	The purpose of the three courses is to review the process of invoicing USAC for the discount share of approved eligible services at EPC for applicants.
Overall Program Objectives	After completing this program, learners should be able to: •Correctly file and certify an FCC Form 472 to request reimbursement from USAC for the discount costs in EPC •Review invoice submission status in EPC •Locate system notifications and respond to outreach in EPC

Electronic Learning Modules: Applicants

There are three electronic learning modules for applicants:

- Submitting & Certifying Invoices For Applicants in EPC
- Invoice Management And Status For Applicants in EPC
- Invoice Notifications And Outreach For Applicants in EPC

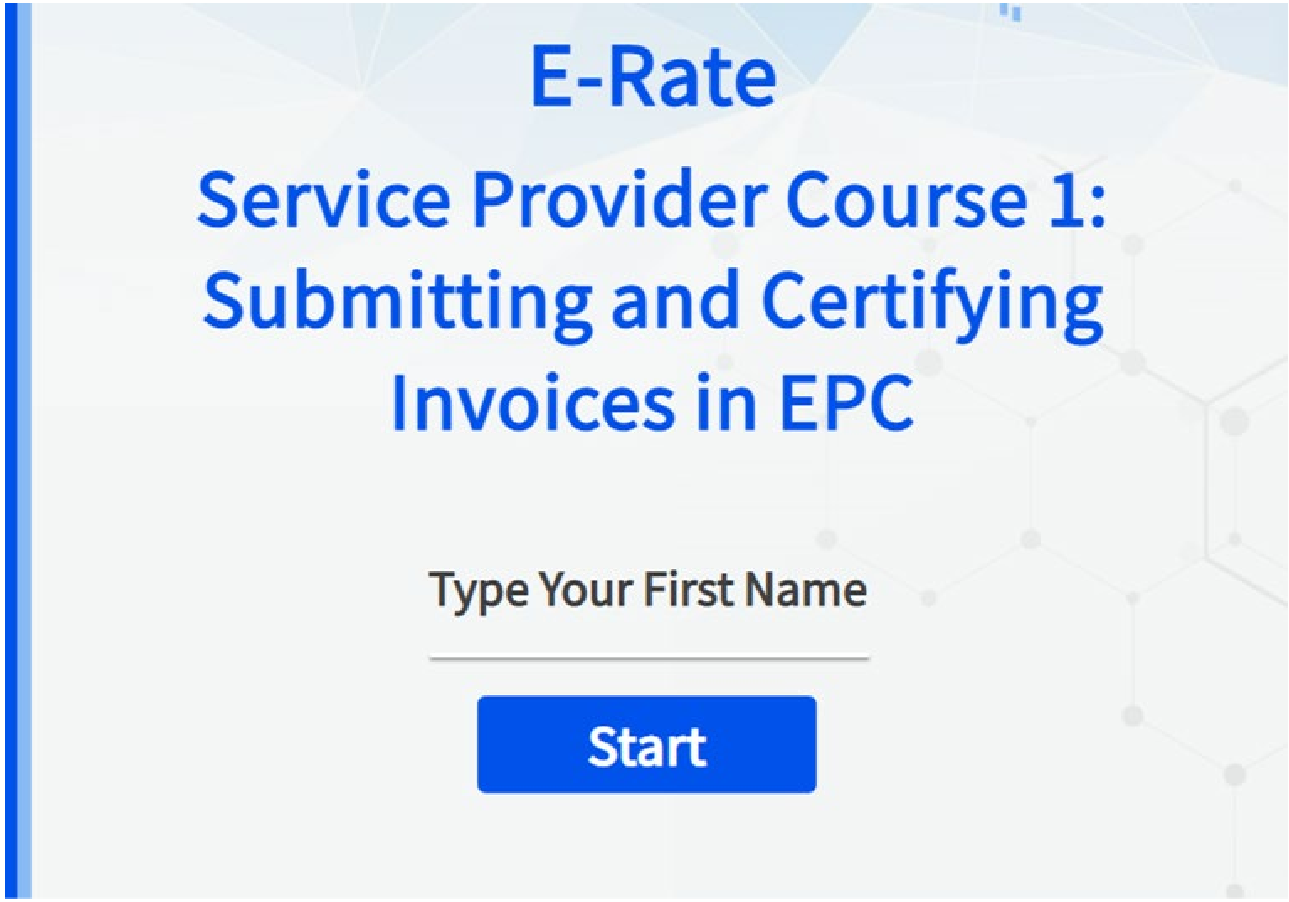
Service Providers eLMs Overview

Audience	Service providers providing eligible equipment and/or services to schools, libraries, and groups of schools and libraries who are eligible for E-Rate program support.
Delivery Method	WBT (Web-Based Training)
Number of Courses	4
Time to complete each course	~50-60 minutes
Instructor Materials	Articulate Storyline
Program Introduction	The purpose of the four courses is to review the process of invoicing USAC for the discount share of approved eligible services at EPC for service providers.
Overall Program Objectives	After completing this program, learners should be able to: •Successfully navigate through the EPC system •Correctly file the FCC Form 473 to certify compliance with E-Rate program rules •Correctly file and certify an FCC Form 474 (SPI and ESPI) to request reimbursement from USAC for the discount amount in EPC •Review invoice submission status in EPC •Locate system notifications and respond to outreach in EPC

Electronic Learning Modules: Service Providers

There are four electronic learning modules for Service providers:

- Submitting & Certifying Invoices in EPC
- Submitting & Certifying Invoices in EPC (ESPI)
- Invoice Management And Status in EPC
- Invoice Notifications And Outreach in EPC



How to Access Electronic Learning Modules (eLMs)

- Available through the E-Rate page
  - Applicants: https://www.usac.org/e-rate/applicant-process/invoicing/how-to-file-fcc-form-472-in-epc/
  - Service Providers: https://www.usac.org/e-rate/service-providers/step-5-invoicing/how-to-file-fcc-form-474-in-epc/

Additional Support

Office Hour Sessions

As you complete the learning modules, we are here to support you.

To support the eLMs and to answer questions applicants and service providers may have while learning about the new E-Rate invoicing process using EPC, USAC has also scheduled upcoming Office Hours sessions. Register to attend.

Materials to review before the training include:

- E-Rate Systems Consolidation Kick-Off Webinar
- E-Rate Systems Consolidation Training Launch
- eLMs for Applicants
- eLMs for Service Providers

Training Plan Schedule: Event Dates

- Training Launch Webinar: Today
- eLearning Modules: Today
- Office Hour sessions provided live for additional support:
  - Occurring October through November
  - Separate sessions for applicants and service providers
  - Invoicing SMEs take your questions live

Reminder: Key Dates

- Last date to submit invoices in Legacy is **October 30**
- First date to submit invoices in EPC is **November 7**

Tips For a Successful Transition

The “Go Live” date is **November 7**, 2023. That is the date when the legacy invoicing system will be fully integrated or consolidated into EPC. Here are some tips for a successful transition from the old legacy invoicing system to the new EPC system:

- Submit current invoices prior to **October 30**, 2023
- Use the Invoicing Requirements Guide linked here
- If your Account Administrator changes, have them designate a new one first

Resources

- System Consolidation Web Page
- E-Rate Learn Page
  - Videos
  - E-Rate News Brief
  - System Consolidation News Brief
- E-Rate Announcements
- Upcoming Dates

Questions

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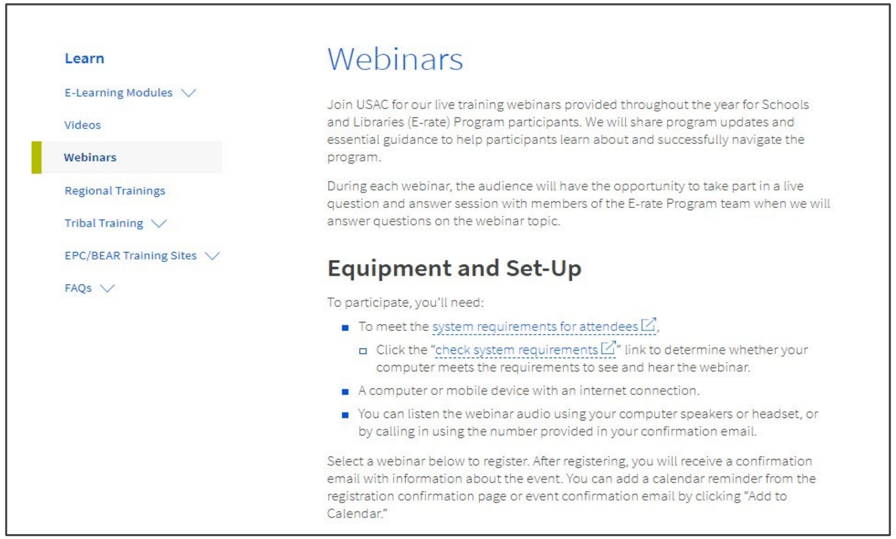
UPCOMING WEBINARS

Our next webinar is on:
10/5 at 2 p.m. ET

Topic: Pre-Commitment Process

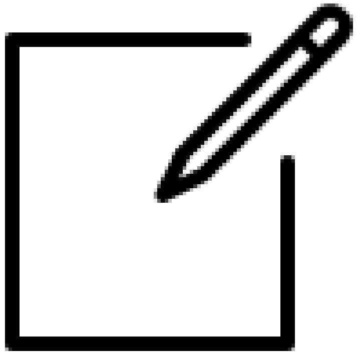
Recommended for: Applicants and service providers

E-Rate Experience Level: Beginner



Go to the E-Rate **Webinars** page for additional information.

Take Our Survey



- 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, one will be emailed to you within one to two business days.
- We appreciate your feedback!

Thank You!

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