



Invoicing

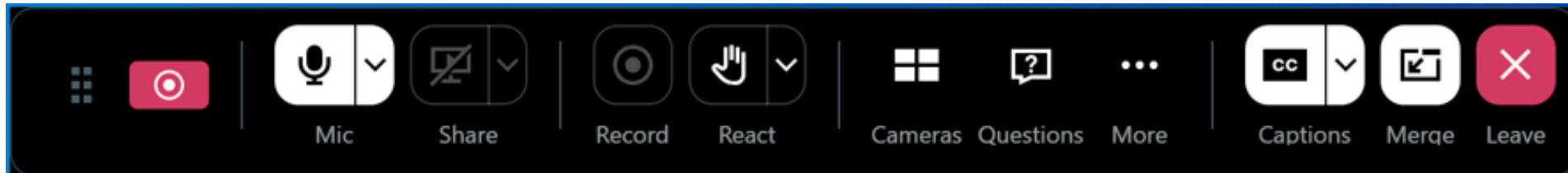
E-Rate Program Participant Webinar
June 12, 2025

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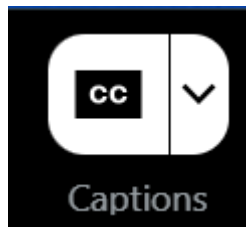
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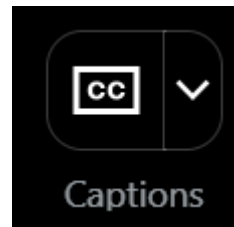
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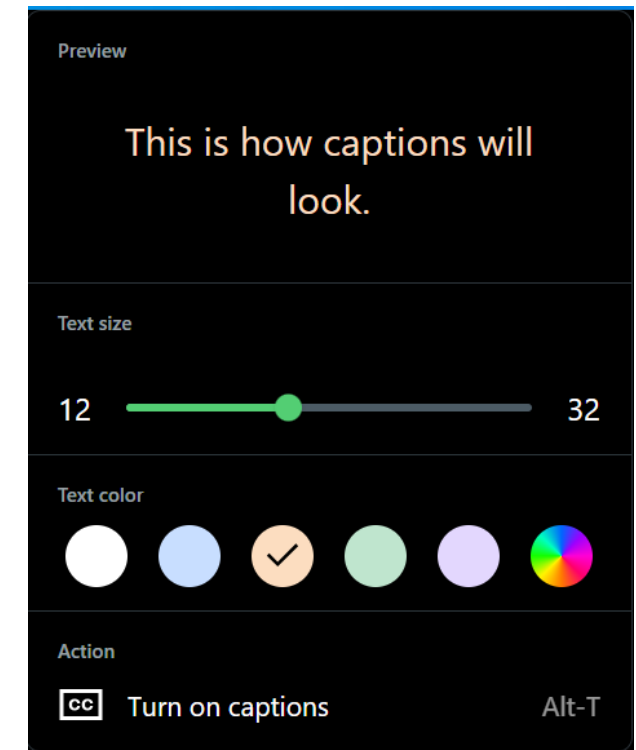
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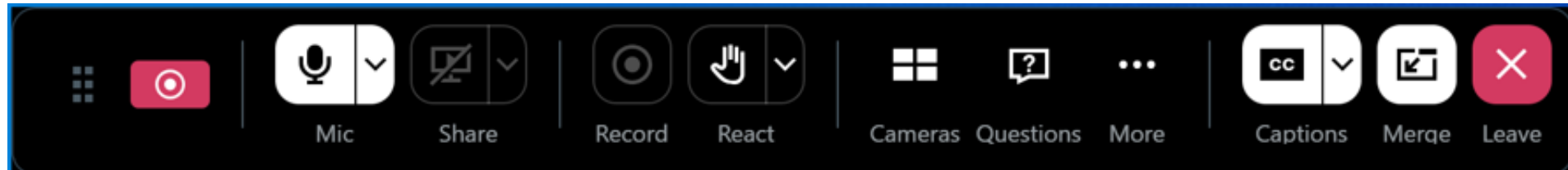
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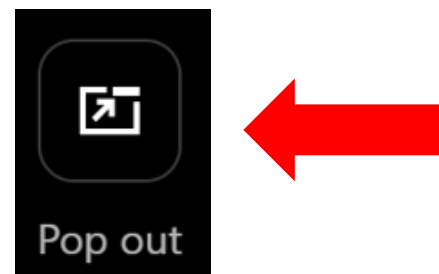
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Questions

×



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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

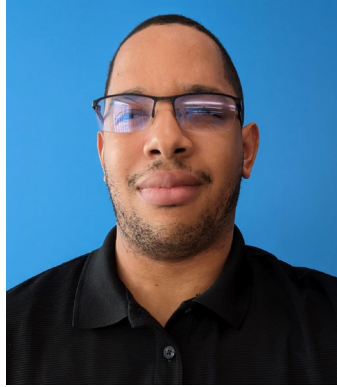
1. Log in to the [**E-Rate Productivity Center \(EPC\)**](#)
2. Select the **Contact Us** link from the upper right menu on the landing page.

Meet the E-Rate Team



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Agenda

- Invoicing Overview
- Preparing to Invoice
- Filing an FCC Form 498
- Filing an Invoice
- Invoice Reviews
- Record Retention and Open Data
- Case Studies
- Key Takeaways

Key Learning Objectives

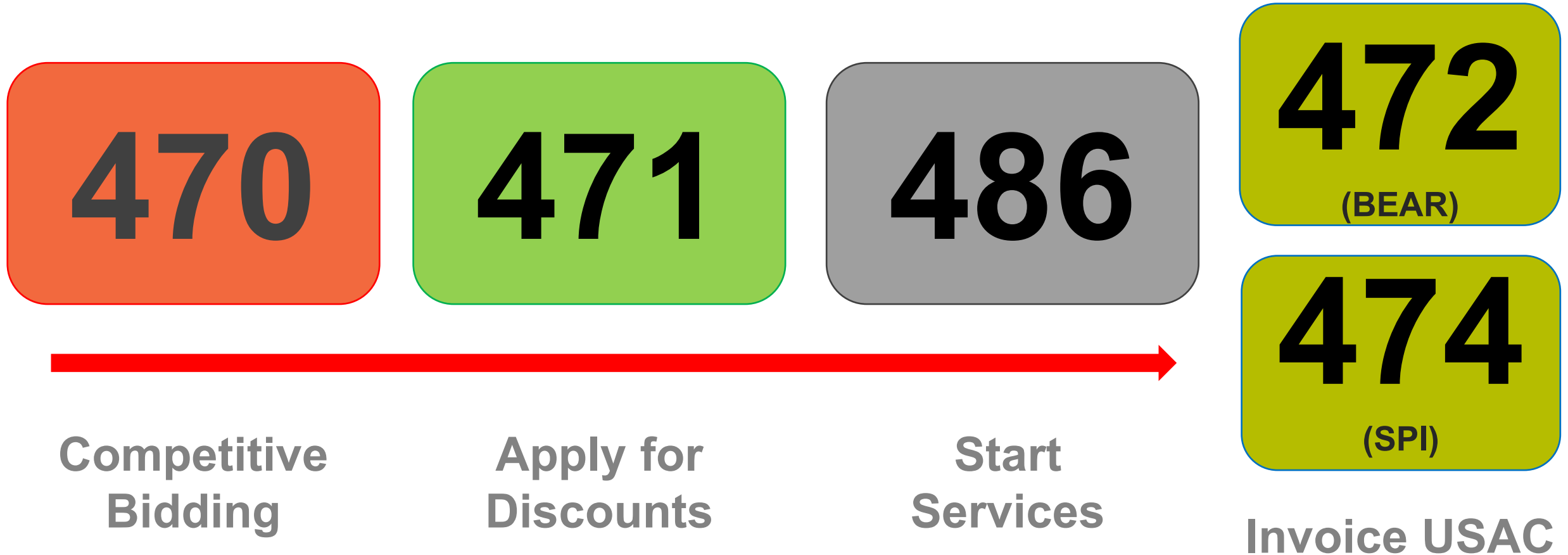
- Timeline to submit invoices (**before** the invoicing deadline)
- Properly certifying forms (only full rights users can certify)
- Using the invoice deadline extension (even if you do not think you will need it)
- Invoicing for APPROVED equipment, quantities, and rates of service
- Preventing duplicate 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

- Invoices for **2016 and after** are processed in **EPC**
- Invoices from **2015 and before** are processed via **customer service case**
 - FY 2015 invoices and earlier remain in the legacy system
 - Download the form dated 2016 in the existing format, complete it, then open a customer service case to get the invoice processed
- **Disbursements are weekly**
- The program rules remain the same for the:
 - 10-year documentation retention period
 - Eligibility of equipment and services

What is the applicant process?



Two Ways to Invoice USAC – Option 1

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

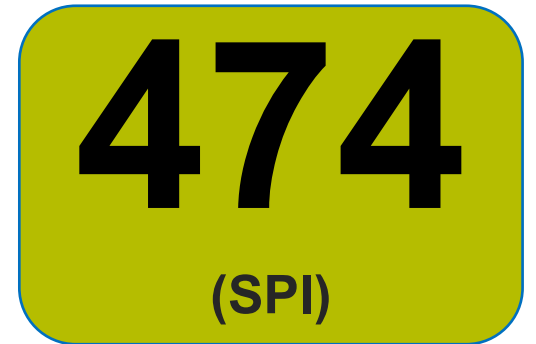
- **Applicants pays the Service provider bill in full before invoicing USAC.**
- Applicant files the BEAR Form and invoices USAC **ONLY** for the approved equipment and services delivered to the eligible Recipient(s) of Service (ROS) in quantities and at the rates not exceeding those on the **FCC Form 471**.
- Respond timely to USAC outreach.
- Applicant must update and certify the FCC Form 498, providing your banking information and backup documents.
- All BEAR invoices 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 amount using the FCC Form 474 (SPI Form).
- Respond in a timely manner to any USAC invoice review questions.
- All SPI invoices due by the invoicing deadline.



Preparing to Invoice

Before You Begin

Select invoicing method (either BEAR or SPI):

- The invoicing mode/method is the applicant's choice and is made for each Funding Request Number (FRN).
- The applicant must decide on a method before invoicing begins.
- **Once USAC processes an invoice for an FRN, the method of invoicing is set.** Applicants may only change the invoicing method once all disbursed funds have been returned. A mode change is requested via the EPC portal.
- Applicants should notify their service providers of the invoicing method per FRN (FCC Form 472 or FCC Form 474).
- 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 User Rights Levels

Types of EPC Rights

- **Full Rights**
 - Can view, prepare, submit, and certify the forms and any post-commitment requests.
 - Provide responses to outreach from USAC reviewers and sign/certify documents sent for review/response.
 - Act as a representative/agent of the entity and are liable for the actions taken as its representative/agent.
 - It is recommended that you have at least two full rights users, so if one is out of the office for any reason, your invoice is not delayed.
- **Partial Rights**
 - 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 Rights**
 - Can view certain information about invoices or post-commitment transactions.

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

Account Administrators

- Responsible for keeping profiles updated — names, emails, and permissions should be reviewed and updated as changes occur.
- Updated profiles and permissions ensure timely communication, invoice reviews, and disbursements — avoid delays and denials by keeping permissions current.

If you do not have an account in EPC or do not know the Account Administrator, call our **E-Rate Customer Service Center (CSC) at (888) 203-8100**. The CSC can also help Account Admins correct or change their account.

Before You Begin (Continued)

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 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: $\$18,360 \times .4 = \underline{\$7,344}$)
- **Non-Discount Amount Paid by Applicant:** (example: $\$18,360 - \$7,344 = \underline{\$11,016}$)

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 guidelines.
- 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.



Filing an FCC Form 498

Filing an FCC Form 498

Pertinent financial information is 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, Records/Create FCC Form 498

- 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.
- If the **Official and General Contact are different people**, remember to modify the entries in the **Remittance Contact fields before the form is certified**.
- A new FCC Form 498 is necessary only when changes have been made.
- Changes made to the service provider FCC Form 498 are automatically updated in EPC, once the changes are approved.
- Applicants and service providers may consult the [User Guide](#) to help with filing the FCC Form 498.

Filing 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)
- [Unique Entity Identifier \(UEI\) through SAM.gov](#)
- [FCC Registration Number \(FCCRN\)](#)

FCC Form 498 Review

USAC will verify your account information within two (2) business days, and the submitter will be notified of the approval or rejection via email.

- Once the FCC Form 498 is certified, you will receive an email from 498BankVerification@usac.org with a link to upload requested banking information.
 - A blank voided check or a copy of the bank account statement is acceptable documentation.
 - If you do not control your bank account, USAC requires a letter from the account owner (i.e., State/District/County Office/School District) or financial institution to confirm the account information.
- To check the status of your 498 ID, contact the Customer Service Center at 888-641-8722, option five (contributors) or email USAC at finops-processing@usac.org.

FCC Form 498 Updates

You are **required to update your 498 ID** form under the following circumstances:

- Your banking information has changed (supporting documentation is required)
- You need to update information on an existing 498 ID:
 - A new entity
 - Update the “New Business Type” field
 - Add a [Unique Entity Identifier \(UEI\)](#)

Updates are not effective until the form is completed and **certified by your School or Library Official and reviewed by USAC.**

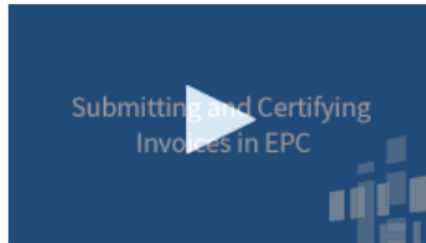
FCC Form 498 Reminders

- If the status of a 498 ID is **not certified** by the Library or School and approved by USAC, **it will prevent approved invoices from being processed** by the US Treasury. (When a 498 ID is uncertified, the banking information is not available to the US Treasury). All payments that cannot be processed are returned to USAC as unpaid.
- Try to avoid making changes to the 498 ID while invoices are in process. If changes must be made, such as updating or deactivating your current 498 ID for a new 498 ID, please make sure all invoices currently in process have been completed.
- Some reasons why your 498 ID may be missing when you log in to file your BEAR:
 - Uncertified recent changes to your FCC Form 498 or banking information
 - Typographical errors
 - Missing banking information
 - 498 ID is not linked to your BEN

Filing an Invoice

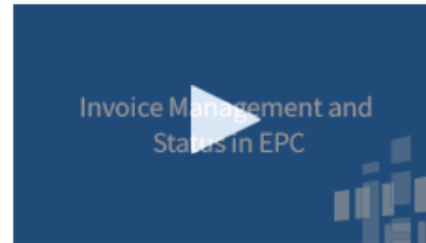
Applicant eLearning Modules (eLMs)

EPC Invoicing for Applicants



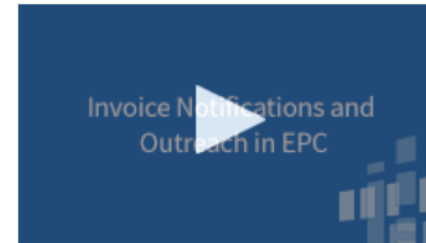
App Course 1: Submitting and
Certifying Invoices in EPC

50:00 minutes



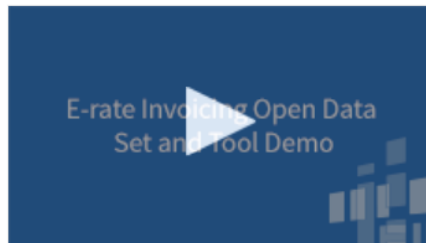
App Course 2: Invoice
Management and Status in EPC

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

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

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

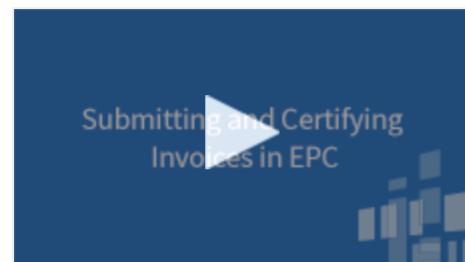
[App Course 3: Invoice and Outreach in EPC](#)

[FCC Form 472 BEAR Form](#)

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

Service Provider eLMs

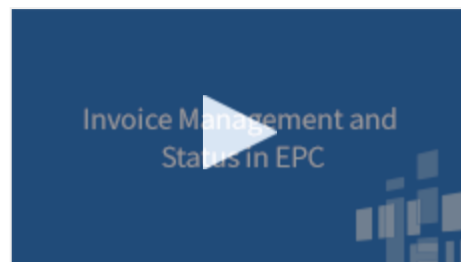
EPC Invoicing for Service Providers



Submitting and Certifying
Invoices in EPC

SP Course 1: Submitting and
Certifying Invoices in EPC

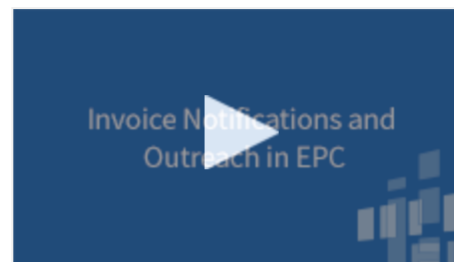
50:00 minutes



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

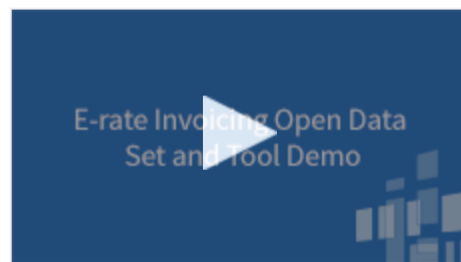
50:00 minutes



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

[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](#)

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

[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.
- The IDD is no later than 120 days after the latest of the following:
 - The last date to receive service (or service delivery deadline).
 - The date of the FCC Form 486 Notification Letter.
 - The date of an RFCDL approving a post-commitment request or appeal of a previously denied or reduced funding request.

Invoice Deadline Extension

- Filers are entitled to one, 120-day invoice deadline extension per FRN.
- You can file an invoice deadline extension request even if you do not use or need it.
- You must file your invoice deadline extension request **BEFORE** the invoice deadline.
- [Extension requests are filed by the applicant and service providers within EPC.](#)
- If you miss the deadline to file an invoice or request an extension, you must request and be granted a waiver of the invoice filing deadline from the FCC.

Invoicing Reminders

- Payments:
 - 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 right user will be denied.

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.
- 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.

Equipment

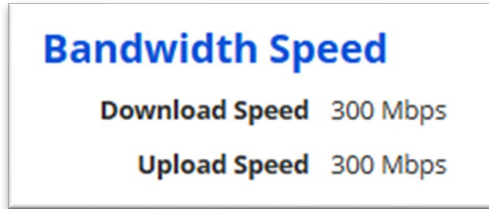
- If an applicant returns equipment to the service provider **prior to invoicing** USAC, neither the applicant nor service provider should invoice USAC for the cost of this equipment.
 - If an invoice for returned equipment has been submitted but not yet been paid, the invoice can be cancelled by opening 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

- Supplemental fees are defined as 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.
- Otherwise, you may be required to provide supporting documentation in response to outreach or an audit inquiry regarding these charges.

Supplemental Fee Example

- Listed on the FCC Form 471



A screenshot of the 'Bandwidth Speed' section from FCC Form 471. The section is titled 'Bandwidth Speed' in blue. Below the title, there are two lines of text: 'Download Speed 300 Mbps' and 'Upload Speed 300 Mbps', both in black.

Bandwidth Speed	
Download Speed	300 Mbps
Upload Speed	300 Mbps

- FCC Form 471 FRN line-item detail 2410XXXXXXX:
 - Bandwidth speed of 300 Mbps for both download and upload. Monthly recurring charge (MRC) is \$750.
- MRC 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, it may be considered a supplemental fee, and 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 customers from submitting their invoice in EPC or result in rejection.
- Invoices may also go through a manual review process.

Manual Invoice Review: Validations

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 contracted services.

Manual Invoice Review: Service Certification

- Some manual reviews require additional documentation to demonstrate:
 - Payment of the non-discounted portion by the applicant.
 - That the invoiced equipment and/or services were delivered and installed.
 - Whether progress payments were included in the contract.
 - That the 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 by a full rights user of the applicant.

Manual Invoice Review: Outreach

USAC may conduct outreach to request additional information / documentation to make a disbursement decision.

- Timely, accurate, and complete responses allow 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
 - The Certification signed by BEN's Partial or View Only rights user or any point of contact from the Service Provider
 - No response/incomplete response to outreach
 - Incomplete documentation provided
 - Outside the eligible timeframe
 - Inaccurate invoice submission
 - Bills do not support the invoiced amount
 - Duplicate submission
- 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)
 - Service provider on the bill does not match the FCC Form 471
- Ineligible equipment and/or services

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.
- 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 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.

Documentation: Reconciliation Worksheet

Maintain a reconciliation worksheet that includes:

- Service provider bill number
- Billed service/product
- Quantity and per unit cost
- Extended billed amount

Ensure:

- Sum of all the extended bill amounts agrees to the total (undiscounted).
- Amount for equipment or service requested on the BEAR form can be traced to the actual copies of the service provider bills.

Service Provider Bills				
Service Provider Bill	Billed Service/Product	Billed Qty	Billed Per Unit Cost	Billed Extended Cost
INV101	Product A	5	\$ 10.00	\$ 50.00
INV102	Product B	5	\$ 15.00	\$ 75.00
INV103	Product C	5	\$ 20.00	\$ 100.00
INV104	Product D	5	\$ 25.00	\$ 125.00
INV105	Product E	5	\$ 30.00	\$ 150.00
			Total Eligible (undiscounted) Amount for Service on BEAR	\$ 500.00

Sample Reconciliation Worksheet

Locating Key Invoicing 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](#)

Case Studies

Case Studies: Similar Line Items

First Invoice:

- #1237851
- Submitted 7/1/2024
- Inv. amount \$842.00
- FRN 239947510
- Customer Bill Date of 7/1/2024

Second Invoice

- #1237895
- Submitted on 8/1/2024
- Inv. amount \$842.00
- FRN 239947510
- Customer Bill Date of 7/1/2024

Question: How will USAC process the second invoice?

Case Studies: Similar Line items

Answer:

- USAC's system will flag the second invoice as a possible duplicate because **the start date and amount billed were the same on both invoices.** To resolve the matter, USAC will conduct outreach.
- The invoice reviewer will request documentation to support both invoices and to demonstrate that the second is not a duplicate.

To avoid this problem:

- The date on each line item should be the date service started **for that line item.** The second invoice should have a customer bill date of 8/1/2024.

Case Studies: Customer Bill

- Applicant submits a BEAR requesting \$1,600.00 reimbursement for Basic Maintenance of Internal Connections (BMIC).
- The service provider provides this customer bill.

Question: What information is missing from this bill?

INVOICE

LMN Service Provider
123 Main Street
Tacoma, Washington 98444

Little Red School
12345 Gravelly Lake Drive
Lakewood, Washington 98409

Basic maintenance	\$2,000.00
-------------------	------------

Case Studies: Customer Bill

Answer:

The bill should include the following:

- A description of the work performed
- Equipment repaired or replaced
- Hours worked, date(s) and time(s)

To avoid this problem:

- Request a detailed bill from the service provider.
- Used the approved discount rate.
- Reconcile the customer bill and the requested reimbursement.

INVOICE

LMN Service Provider

123 Main Street

Tacoma, Washington 98444

Little Red School

12345 Gravelly Lake Drive

Lakewood, Washington 98409

Basic Maintenance \$2,000.00

Description:

- Two hours of onsite maintenance
- Performed on August 21st 2019
- On product APC SMART-UPS 3000VA RM 2U LCD

Key Takeaways

Key Takeaways

- 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.

Resources


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

Live Q&A

- Submit your questions about today's topics:
 - Invoicing Overview
 - Preparing to Invoice
 - Filing an FCC Form 498
 - Filing an Invoice
 - Invoice Reviews
 - Record Retention and Open Data

Questions

×



No questions yet
Questions you send and answers from the staff
will appear here

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 on (888) 203-8100

Monday – Friday 8 a.m. to 8 p.m. ET

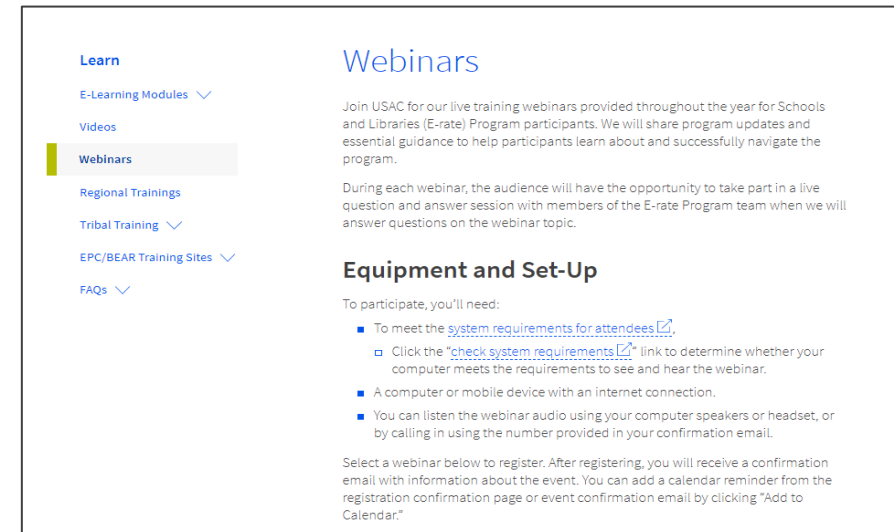


**Create a customer service case in the
E-Rate Productivity Center (EPC):**

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

Upcoming Webinars

- Our next webinar is on **June 24, 2025**
- **Service Provider Webinar**
 - Recommended service providers
 - Suitable for all E-Rate experience levels
- Please visit the E-Rate [Webinars](#) page for additional information.



The screenshot shows a web page with a left sidebar and a main content area. The sidebar has a 'Learn' section with links to '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' heading, a paragraph about live training webinars, a paragraph about audience participation, an 'Equipment and Set-Up' heading, a list of requirements, and a registration instruction.

Learn

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

Webinars

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.

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.

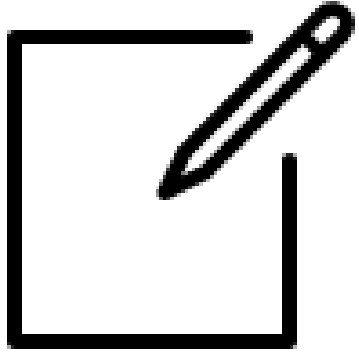
Equipment and Set-Up

To participate, you'll need:

- 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.
- You can listen the webinar audio using your computer speakers or headset, or by calling in using the number provided in your confirmation email.

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."

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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