

# E-Rate Invoicing

October 13, 2023



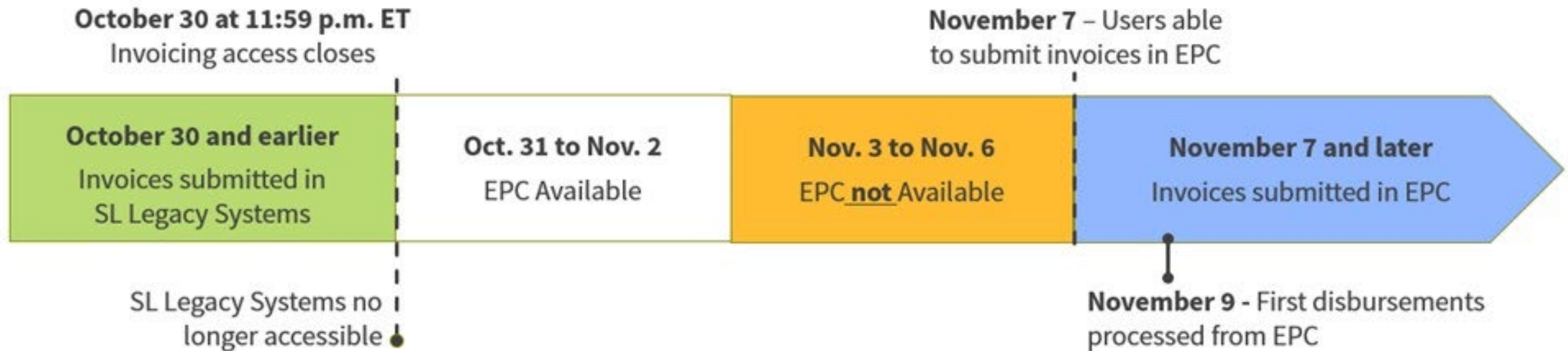
Universal Service  
Administrative Co.

# AGENDA

- Implementation dates
- Key features
- What is changing/remaining the same
- High level Invoice Submission
- Support through the Implementation
- Key reminders

# Systems Consolidation Timeline

# Implementation Dates



## Consolidation of E-Rate SL Legacy systems

- All E-Rate invoicing forms will be moved into EPC as part of the systems consolidation effort:
  - FCC Form 472 (Billed Entity Applicant Reimbursement (BEAR))
  - FCC Form 474 (Service Provider Invoice (SPI) and (eSPI))
  - FCC Form 473 (Service Provider Annual Certification (SPAC))



# Implementation and Black Out Dates

- **Before October 30, 2023**
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- **November 9, 2023**
  - First disbursements from EPC-processed.

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- Notifications about invoice submission status are in your EPC News Feed.
- Helpful tools for obtaining invoicing details and statuses.

# What is staying the same

- E-Rate Invoice program processes and rules
- Information and documentation submitted
- Eligibility of equipment and services
- 7 days to respond to outreach
- Ten-year document retention
- Invoice deadlines
- Disbursements will continue to be made twice a week

# Pop Quiz



After the system consolidation is complete, how will you submit invoice for FY2015 and prior?

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**Answer:** There will be a downloaded form file that will be completed and submitted via a customer service case in EPC.

# Invoice Submission Process

**470**

**Competitive  
Bidding**

**471**

**Apply for  
Discounts**

**486**

**Start  
Services**

**472**

**474**

**Invoice USAC**

# Invoice USAC

## Billed Entity Applicant Reimbursement (BEAR) Form

- Pay your customer bill in full and maintain documentation associated with your FCC Form 472 (BEAR Form).
  - The Commission records retention period is **at least 10 years** from last date of the applicable funding year or the service delivery deadline for the funding request.
- Only invoice USAC for the approved equipment/services delivered to the approved Recipient(s) of Service at the quantities and rates not to exceed what was listed on the FCC Form 471.
- Respond timely to any USAC invoice review questions.
- Certify and update the FCC Form 498 to provide your banking information and backup documents to the FCC for review.




472

# Invoice USAC

## Service Provider Invoice (SPI) form

- Applicants pay only your non-discounted share of costs on the customer bill (the bill from your service provider).
  - The Commission records retention period is **at least 10 years** from last date of the applicable funding year or the service delivery deadline for the funding request.
- Your service provider will invoice USAC for the discount amount using the FCC Form 474 (SPI Form).
- Respond timely to any USAC invoice review questions.



474

# Service provider verifications

- FCC Form 473 – The Service Provider Annual Certification (SPAC)
  - Service providers file annually certifying they will comply with program rules and guidelines.
  - A new SPAC form must be on file each funding year a service provider participates in the E-Rate program.
  - A SPAC is required for each [Service Provider Identification Number](#) (SPIN)/498 ID.
  - The FCC Form 473 must be filed before USAC will pay invoices.





# Filing FCC Form 498

Pertinent financial information is collected via the FCC Form 498 allowing disbursements.

- Applicant invoicing via a 472/BEAR will receive a 498ID.
- Service providers invoicing via a 474/SPI will receive a Service Provider Identification Number (SPIN/498 ID).

## Applicants:

- File a 498ID 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 certify).
  - A **General Contact** can complete, 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.**
- Applicants and service providers may consult the [User Guide](#) to help with filing the FCC Form 498.

# 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 Date (IDD) are posted in EPC on the FRN detail screen.

The IDD is no later than 120 days after the latest of the following:

- Service Delivery Deadline (SDD) is the last date to receive service.
- Date of the FCC Form 486 Notification Letter.
- Date of the approved post-commitment RFCDL.
- Date of an approved appeal RFCDL for a previously denied or reduced funding request.

# FCC Form 472/474 Invoice Submission

Invoicing Dashboard Universal Service Administrative Co.

## FCC Form 472

OMB Number 3060-0856 Form 472

Basic Information    **Invoice Line Item Summary**    Preview    Certify Form 472

### Little Red Library (BEN: 17032077) - LRL - #BEAR202200390

#### Invoice Line Item

<input type="checkbox"/>	Invoice Line Item Number	FCC Form 471 Application Number	Funding Request Number (FRN)	Billing Frequency (FRN)
No items available				

**+ ADD LINE ITEM**    EDIT LINE ITEM    REMOVE LINE ITEM

BACK    DISCARD FORM    SAVE & CONTINUE

# FCC Form 472/474 Invoice Submission

## FCC Form 472

OMB Number 3060-0856 Form 472

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Basic Information      Invoice Line Item Summary      Preview      Certify Form 472

### Little Red School District (BEN: 17032076) - Test - #BEAR202200398

#### Invoice Line Item

**Select Funding Year**  
2022

**Funding Request Number (FRN)**

**Select FRN**  
Please select a row to auto-populate the form details below.

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#### Add New Invoice Line

<b>Form 471 Application Number</b> 221039437	<b>Funding Request Number</b> 2299058985
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**Billing Frequency \***

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**Customer Billed Date**

**Shipping Date to Customer or Last Day of Work Performed**

**Supporting Documentation**

**Total Undiscounted Amount for Service \***

**Discount Amount Billed to USAC**  
(Total Undiscounted Amount For Service \* Discount Rate)

# FCC Form 472/474 Invoice Submission

## FCC Form 472

OMB Number 3060-0856 Form 472

Basic Information

Invoice Line Item Summary

Preview

Certify Form 472

Little Red School District (BEN: 17032076) - Test - #BEAR202200398

### Invoice Line Item

Select Funding Year

2022

Funding Request Number (FRN)

SEARCH

CLEAR FRN FILTER

Select FRN

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mm/dd/yyyy

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Supporting Documentation

UPLOAD  Drop files here

Total Undiscounted Amount for Service \*

Please enter the amount billed to USAC

Discount Amount Billed to USAC

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CANCEL

SAVE

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**Total Undiscounted Amount for Service \***

**Discount Amount Billed to USAC**  
(Total Undiscounted Amount For Service \* Discount Rate)



# FCC Form 472/474 Invoice Submission

 Invoicing Dashboard  

## FCC Form 472

OMB Number 3060-0856 Form 472

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[Basic Information](#)   [Invoice Line Item Summary](#)   [Preview](#)   **[Certify Form 472](#)**

### Little Red School District (BEN: 17032076) - SEND FOR CERTIFICATION - #BEAR202200376

#### ▲ Billed Entity Certifications & Signature





Please check all boxes to certify.

I declare under penalty of perjury that the foregoing is true and correct and that I am authorized to submit this Billed Entity Applicant Reimbursement Form on behalf of the eligible schools, libraries, or consortia of those entities represented on this Form, and I certify to the best of my knowledge, information, and belief, as follows:

- I certify that the discount amounts listed in this Billed Entity Applicant Reimbursement Form represent charges for eligible services and/or equipment delivered to and used by eligible schools, libraries, or consortia of those entities for educational purposes, on or after the service start date reported on the associated FCC Form 486.
- I certify that the discount amounts listed in this Billed Entity Applicant Reimbursement Form were already billed by the Service Provider and paid for by the Billed Entity Applicant on behalf of eligible schools, libraries, and consortia of those entities.
- I certify that the discount amounts listed in this Billed Entity Applicant Reimbursement Form are for eligible services and/or equipment approved by the Fund Administrator pursuant to a Funding Commitment Decision Letter (FCDL).
- I acknowledge that I may be audited pursuant to this application and will retain for at least 10 years (or whatever retention period is required by the rules in effect at the time of this certification), after the latter of the last day of the applicable funding year or the service delivery deadline for the funding request any and all records that I rely upon to complete this form.
- I certify that, in addition to the foregoing, this Billed Entity Applicant is in compliance with the rules and orders governing the schools and libraries universal service support program, and I acknowledge that failure to be in compliance and remain in compliance with those rules and orders may result in the denial of discount funding and/or cancellation of funding commitments. I acknowledge that failure to comply with the rules and orders governing the schools and libraries universal service support program could result in civil or criminal prosecution by law enforcement authorities.

[BACK](#) [CERTIFY & SUBMIT](#)

# Invoice Status Overview

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

# Pop Quiz

**An Applicant has chosen to invoice via a 472/  
BEAR. When is the applicant required to pay their  
service provider?**

**An Applicant has chosen to invoice via a 472/  
BEAR. When is the applicant required to pay their  
service provider?**

**A:** After USAC has paid the applicant













**B:** The Applicant is required to pay their bill in  
Full before Invoicing USAC

**An Applicant has chosen to invoice via a 472/  
BEAR. When is the applicant required to pay their  
service provider?**

**A:** After USAC has paid the applicant

**B:** The Applicant is required to pay their bill in  
Full before Invoicing USAC












## Applicant Invoice Notifications (FY2016+)

Notification:	Description:	Generated:	Method of Delivery:
<b>Invoice Pending Certification</b>	Notification that an invoice requires certification by a Full Rights user	A Partial Rights user creates an invoice and sends it to a Full Rights user to certify	 <b>Create FCC Form 472</b> task in <b>My Pending Tasks</b> tab assigned to <b>Full Rights</b> users  Email alert to <b>Full Rights</b> user that a new task has been assigned
★ <b>Information Request Received from USAC for an Invoice Line</b>	Notification that an invoice line has an inquiry from USAC that requires a response	A USAC reviewer sends new communication regarding an invoice line	 Email to <b>Partial</b> and <b>Full Rights</b> users with invoice permissions for the BEN  <b>Invoice Line Number</b> listed for <b>Full Rights</b> users in <b>My Pending Inquiries</b> tab
<b>Deadline Extended for Response to Information Request</b>	Notification that additional time has been granted to respond to an inquiry for an invoice line	A USAC reviewer updates the response due date for an invoice line that was granted an extension	 Email to <b>Partial</b> and <b>Full Rights</b> users with invoice permissions for the BEN  <b>Invoice Line Number</b> listed for <b>Full Rights</b> users in <b>My Pending Inquiries</b> tab
★ <b>BEAR Notification Letter*</b>	A letter notifying users that an invoice line or lines submitted using the BEAR mode have been processed	After each payment file batch is run, typically at the end of every Monday and Thursday	 Email to <b>all users</b> with invoice permissions for the BEN  News post visible to <b>all users</b> with invoice permissions for the BEN
<b>BEAR Remittance Statement*</b>	A letter notifying users of the amount approved for payment for a processed invoice line or lines	After each payment file batch is run, typically at the end of every Monday and Thursday	 Email to <b>General Financial Contact</b> listed on <b>FCC Form 498</b>  News post visible to <b>General Financial Contact</b> on <b>FCC Form 498</b>
<b>Applicant QDR*</b>	A quarterly summary of disbursement activity for a particular BEN number for invoice lines submitted using both the BEAR and SPI mode	At the end of every quarter (Jan, Apr, Jul, and Aug) if the BEN has invoicing activity that quarter	 Email to <b>all users</b> with invoice permissions for the BEN  News post visible to <b>all users</b> with invoice permissions for the BEN

\*For invoices with a funding year of 2015 and earlier, the BEAR Notification Letter, BEAR Remittance Statement, and Applicant QDR will be continue to be sent via mail.



## Service Provider Invoice Notifications (FY2016+)

Notification:	Description:	Generated:	Method of Delivery:
<b>Invoice Pending Certification</b>	Notification that an invoice requires certification by a Full Rights user	A Partial Rights user creates an invoice and sends it to a Full Rights user to certify	 <b>Create FCC Form 474</b> task in <b>My Pending Tasks</b> tab assigned to <b>Full Rights</b> users  Email alert to <b>Full Rights</b> user that a new task has been assigned
<b>Information Request Received from USAC for an Invoice Line</b>	Notification that an invoice line has an inquiry from USAC that requires a response	A USAC reviewer sends new communication regarding an invoice line	 Email to <b>Partial</b> and <b>Full Rights</b> users with invoice permissions for the SPIN  <b>Invoice Line Number</b> listed for <b>Full Rights</b> users in <b>My Pending Inquiries</b> tab
<b>Deadline Extended for Response to Information Request</b>	Notification that additional time has been granted to respond to an inquiry for an invoice line	A USAC reviewer updates the response due date for an invoice line that was granted an extension	 Email to <b>Partial</b> and <b>Full Rights</b> users with invoice permissions for the SPIN  <b>Invoice Line Number</b> listed for <b>Full Rights</b> users in <b>My Pending Inquiries</b> tab
<b>Invoice Status Report</b>	A report of the validation status of all certified invoice lines associated with the SPIN number that have been through invoice data validation	After each payment file batch is run, typically at the end of every Monday and Thursday	 Email to <b>all users</b> with invoice permissions for the SPIN
<b>SPI Remittance Statement*</b>	A letter notifying users of the amount approved for payment for a processed invoice line or lines	After each payment file batch is run, typically at the end of every Monday and Thursday	 Email to <b>Remittance Statement Contact listed on FCC Form 498</b>  Visible in the E-File Portal to <b>Remittance Statement Contact on FCC Form 498</b>
<b>ESPI Upload Ready for Review</b>	Notification that the validation results for an ESPI file upload are ready to be reviewed by a Full Rights user	The automated file format validation process for an ESPI file upload is complete in EPC	 Email to the <b>Full Rights</b> users who uploaded the ESPI file  <b>Review ESPI Upload Result</b> task in <b>My Pending Tasks</b> tab assigned to the <b>Full Rights</b> user

\*See the [Retrieving Remittance Statements in E-File Video Tutorial](#) for instructions on accessing this notification from the E-File Portal



# Invoicing Status Tools

# 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	✓	✓	✗	✓	✓	✓

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# How We Will Support You

# How We Will Support You

To ease the learning curve, USAC has created a multi-pronged plan to support you throughout the E-Rate systems consolidation, including:

- Invoicing Webinars
  - [E-Rate Systems Consolidation Kickoff slide deck](#)
  - [Training Overview Webinar slide deck](#)
- Interactive eLearning Modules (eLMs)
  - [For Applicants](#)
  - [For Service Providers](#)
- A series of office hour sessions after you've completed the eLMs
  - [Register here](#)
- Website updates

# Electronic Learning Modules (eLMs)

A new addition to the E-Rate learning tools.

- New Learning Format.
- Interactive Learning Tool.
- Focused on EPC invoicing concepts.
- Available on demand and self-paced.
- Comprise aspects that appeal to different learning styles:
  - Kinesthetic - learn by doing;
  - Visual - learn by seeing/reading; and
  - Auditory - learn by hearing.
- Include Job Aids with key concepts and reminders that can be downloaded or printed.

# Office Hour Sessions

Ask our subject matter experts any questions you have after completing the eLMs.

- Submission of FCC Form 472 (BEAR) and FCC Form 474 (SPI and ESPI) forms.
- How communication is sent and received based on the EPC users' permission levels.
- New reports and tools that empower you to obtain invoice status details.
- Specific to FCC Form 472 (BEAR) and FCC Form 474 (SPI) filers.

## Website Support

- We will continue to update the website to support your learning.
- Practice filing invoices in our updated BEAR and SPI Training environments.
- Read our Special Edition **E-Rate Systems Consolidation News Briefs**
  - Subscribe to the E-Rate News Brief [here](#)

## Important Reminders

- Ensure your EPC Access is working
- Complete E-Learning Modules
- Attend Office Hour sessions
- Review and update user rights with your Admin
- Submit your invoices in the legacy system before October 30<sup>th</sup>
- Invoicing for FY2016 and later will be submitted in EPC starting 11/7
- Invoicing for FY2015 and earlier will be submitted via a customer service case



**Thank You!**

