

E-rate Form 472

“BEAR” Reimbursement

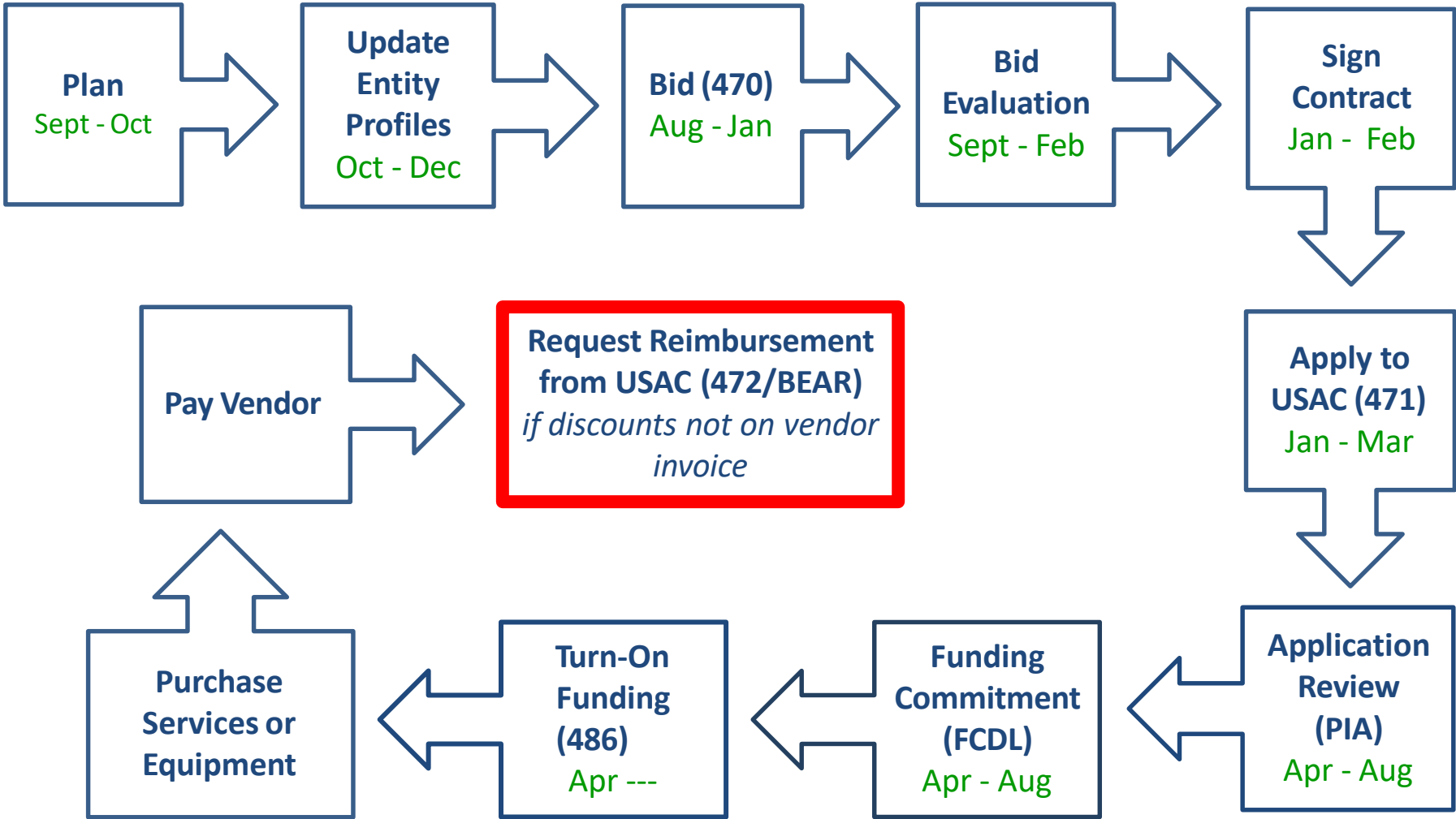
Filing Guide

FY 2019 & FY 2020



Presented by Julie Tritt Schell
PA E-rate Coordinator
for the Pennsylvania Department of Education
July 2020

You are **here** in the E-rate process:

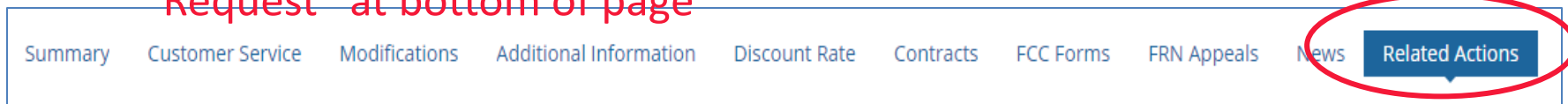


Purpose of the Form 472 “BEAR”

- If an applicant has not received discounted vendor invoices, they must file the Form 472 “BEAR” to seek reimbursement from USAC for the E-rate eligible amount
 - If the applicant received discounted bills, it is up to the vendor to submit the SPI Form (Service Provider Invoice) to USAC and no BEAR form can be filed
- The BEAR provides USAC with the total amount of E-rate eligible funding spent for an FRN and the system calculates reimbursement amount
 - Cannot be reimbursed more than your funding commitment cap
 - Can only be reimbursed for the eligible amount spent, multiplied by the approved discount
 - Cannot submit a request up to your cap if you did not spend that much
- BEARs for recurring services can be submitted monthly, quarterly, semi-annually or annually
 - Most applicants submit a single BEAR after the funding year has ended
- BEARs for equipment or one-time services can be submitted after the equipment is received and paid for (or services have been rendered)
- A BEAR must be submitted for each different SPIN
 - Two FRNs with the same SPIN can be submitted on the same BEAR

When to File BEARs (latest date)

- Normally, BEARs are due within 120 days from the last day to receive service. But due to COVID-19, FCC has extended invoicing deadlines as follows:
 - **FY 2019:**
 - Recurring Services = February 25, 2021
 - Non-Recurring Services = January 28, 2022
- If the BEAR cannot be submitted by this date, the applicant **must** submit an Invoice Deadline Extension Request (IDER) to USAC (in EPC) by the original invoice deadline
 - One, 120-day extension will automatically be granted
 - No further extensions can be granted
 - FCC will not approve a late-submitted invoice or IDER request
 - Select “Related Actions” in EPC, then “Invoice Deadline Extension Request” at bottom of page



Summary Customer Service Modifications Additional Information Discount Rate Contracts FCC Forms FRN Appeals News **Related Actions**

Invoice Deadline Date Extension Request
Request an extension to the invoice deadline for one or more funding requests.

When to File BEARs (earliest date)

- **Recurring Services**

- BEARs may be filed on or after July 1 of the new funding year, but are typically filed after the funding year has ended
 - Note: Installation of recurring services may begin as early as January 1 (or contract signing date, whichever is later), prior to the funding year
 - However, actual services may not begin until July 1 and a BEAR cannot be submitted until after July 1

- **Non-Recurring Equipment Purchases**

- Equipment may be purchased and installed as early as April 1 before the start of the July 1 start of the funding year
- BEARs may be filed on or after July 1, presuming the application was approved and Form 486 filed
 - Applicants that purchased equipment prior to July 1 and paid for the equipment in full will submit the BEAR shortly after July 1 to get reimbursed
 - Vendor invoices are permitted to be dated beginning July 1

File BEARs in Legacy System (NOT EPC)

- BEARs must be filed using the legacy BEAR system
 - They are NOT filed in EPC
 - File at: <https://www2.sl.universalservice.org/bear/login.aspx>
- Must use the E-rate PIN to access online BEAR
 - The BEAR PIN is different than your EPC log-in
 - If you don't have a BEAR PIN, complete the PIN Request Template at: <http://www.usac.org/res/documents/sl/xls/PIN-request-template.xlsx>
 - And then upload it into EPC by creating a Customer Service Case
 - USAC will e-mail your BEAR PIN within a week
- BEARs are filed without any vendor involvement and do not require vendor certification or approval

Direct Deposit of BEAR Reimbursements

- All E-rate BEAR reimbursements are sent via Direct Deposit directly to the school or library's bank account
 - Payments are made directly from U.S.Treasury via electronic transfers to the applicant's bank account
 - Vendors are not involved with the flow of BEAR payments
- Applicants must have a USAC-approved Form 498 prior to filing the BEAR
 - Form 498 identifies the bank and account information where the BEAR reimbursements should be electronically deposited
 - To determine if you have an approved Form 498, log into the Online BEAR System, and if a Form 498 ID doesn't appear in the form, it means you don't have an approved 498 on file with USAC.
 - If you don't have a BEAR PIN yet and want to see if you have an approved 498, log into EPC > Records > Form 498s > Click on 498 if one is showing to see the Status. If no 498 is showing, then there isn't one on file with USAC.
- To update the Form 498 with new banking information, or to indicate "Business Type" and provide your DUNS number:
 - Log into EPC > Records > Form 498 > Related Actions > Modify Form 498
 - <http://e-ratepa.org/?p=31938>

Let's File a Form 472 BEAR

Go to: <https://www2.sl.universalservice.org/bear/login.aspx>



Call 888-203-8100 if PIN doesn't work, if you can't remember the PIN, or need a PIN

Applicant Login:

BEN:

PIN:

Email:

Last Name:

Enter Billed Entity Number

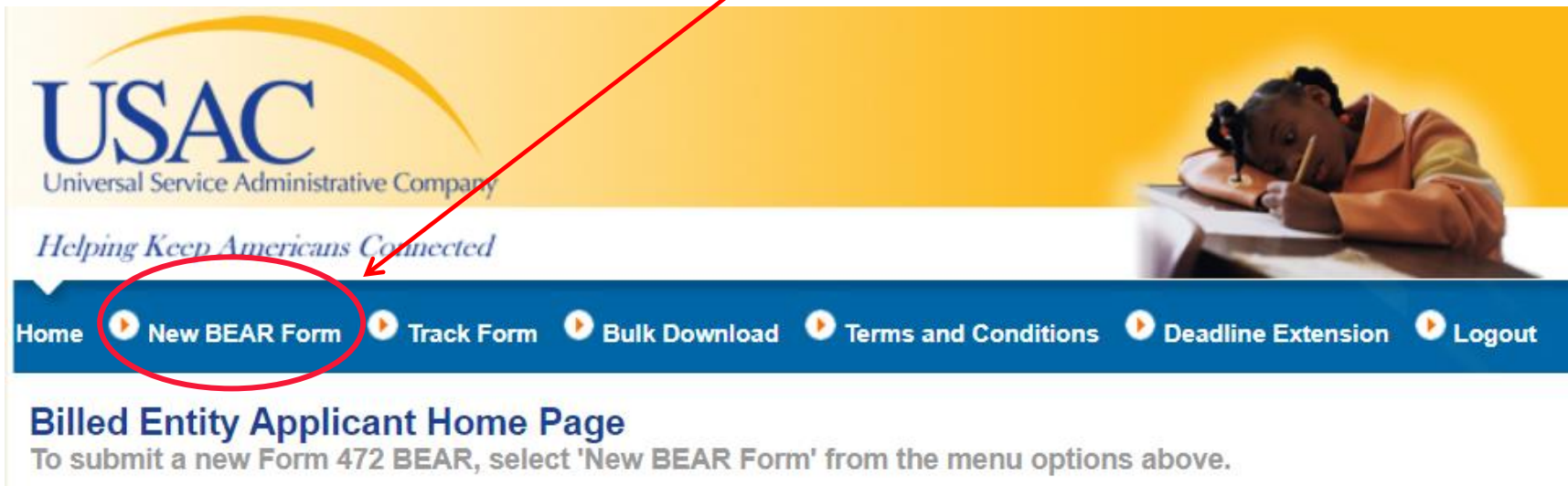
Enter E-rate PIN

Enter E-mail Address of PIN User

Enter Last Name of PIN User

How to Start a BEAR

Select "New BEAR Form"



The image shows a screenshot of the USAC website. At the top left is the USAC logo with the text "Universal Service Administrative Company" and the tagline "Helping Keep Americans Connected". On the right is a photograph of a young girl writing at a desk. Below the header is a dark blue navigation bar with white text and right-pointing arrows. The items are: Home, New BEAR Form (circled in red), Track Form, Bulk Download, Terms and Conditions, Deadline Extension, and Logout. A red arrow points from the text box above to the "New BEAR Form" link. Below the navigation bar is the heading "Billed Entity Applicant Home Page" and the instruction: "To submit a new Form 472 BEAR, select 'New BEAR Form' from the menu options above."

Block 1: Contact, SPIN, 498ID

Add BEAR Invoice

Applicant Form Identifier

Applicant chooses
"nickname" for this BEAR

Enter the 9-digit SPIN.
Always begins
143xxxxxx

Block 1: Header Information

[Need Help?](#)

1. Billed Entity Name

ELIZABETHTOWN AREA
SCHOOL DIST

2. Billed Entity Number

125681

3. Service Provider Identification Number (SPIN)

Service Provider Name

CenturyLink United Telephone Co. of
Pennsylvania FKA Embarq

Applicant FCC Form 498 ID

Form 498 ID is pre-populated. If it's not showing, it means the 498 has not yet been submitted or USAC approved. The BEAR cannot be submitted unless a Form 498 ID is showing here.

4. Contact Name

This information is pre-populated,
but it can be changed.

5. Contact Telephone Phone

() - ext.

Contact Fax

() -

Contact Email

6. Total Reimbursement Amount

(total from Block 2, Column
14)

\$ 0.00

This amount will be
calculated based on the
data provided in Block 2.

Block 2: FY 2019 Recurring FRN

Block 2: Line Item Information Per Funding Request Number

[Need Help?](#)

7. FCC Form 471 Application Number (from Funding Commitment Decision Letter)	8. Funding Request Number (FRN) (from Funding Commitment Decision Letter)	9. Bill Frequency	10. Customer Billed Date	11. Shipping date to Customer or Last Day of Work Performed (mm/dd/yyyy)	12. Total (Undiscounted) Amount for Service	13. Discount Rate	14. Discount Amount Billed to USAC (Column 12 multiplied by Column 13)
1) 190xxxxxx	191xxxxxx	MONTHLY	07/01/2019		40000.00	30	12000.00

The system will calculate this amount.

The 471 and FRN numbers can be found on your FCDL.

Only complete Item 10 OR Item 11 – not both.
For recurring services, use Item 10 and list first date you received services in the funding year (generally always 7/1/2019 for FY 2019).

Enter the total pre-discount amount for eligible charges

The discount rate will pre-populate based on the FRN number listed in Item 8.

Add Line Item

If you have another FRN with this vendor, you can add it here.

Block 2: FY 2020 Non-Recurring FRN

Block 2: Line Item Information Per Funding Request Number

[Need Help?](#)

7. FCC Form 471 Application Number (from Funding Commitment Decision Letter)	8. Funding Request Number (FRN) (from Funding Commitment Decision Letter)	9. Bill Frequency	10. Customer Billed Date	11. Shipping date to Customer or Last Day of Work Performed (mm/dd/yyyy)	12. Total (Undiscounted) Amount for Service	13. Discount Rate	14. Discount Amount Billed to USAC (Column 12 multiplied by Column 13)
1) 200xxxxxx	200xxxxxx	One-Time <input checked="" type="checkbox"/>	07/01/2020		40000.00	80%	32,000.00

The system will calculate this amount.

The 471 and FRN numbers can be found on your FCDL.

Only complete Item 10 OR Item 11 – not both.
For non-recurring services, such as C2 equipment, use Item 11. **Note: this date cannot be before 7/1/2020 for FY 2020 FRNs.**

Enter the total pre-discount amount for eligible charges.

The discount rate will pre-populate based on the FRN number listed in Item 8.

Add Line Item

If you have another FRN with this vendor, you can add it here.

Block 3: Certifications

Click on each certification box.

Block 3: Billed Entity Certification

Need Help?

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:

- A.** 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.
- B.** 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.
- C.** 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).
- D.** 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.
- E.** 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.

Block 3: Signatory Data/Submit

Click the "signature" certification box.

Contact Information for Billed Entity Authorized Person:

15. Signature

By logging into your account using your PIN, checking this box, and clicking the "certify" button at the end of the form, you have electronically signed the form. You are reminded that an electronic signature is the same as a handwritten signature on the form. To see a copy of the Terms and Conditions to which you previously agreed, please click on the "Terms and Conditions" menu above.

16. Date 7/15/2019

17. Name GEORGE LONGRIDGE

18. Title/Position BUSINESS MANAGER

20. Address 1 600 EAST HIGH STREET

Address 2

City ELIZABETHTOWN

State PA

Zip Code 17022 -

19. Phone Number (717) 555 - 1111 ext

19a. Fax Number (717) 555 - 1112 ext

19b. Email jtschell@comcast.net

19c. Name of Authorized Person's Employer htown Area School District

This information is pre-populated, but can be changed.

This information must be manually entered.

An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number.

Clear Save Certify and Submit

Click "Certify and Submit" to submit the BEAR directly to USAC!

What Happens Next?

- After the BEAR is submitted, it is transmitted directly to USAC
 - Vendors no longer approve BEARs
- USAC may review and ask for additional information or copies of invoices/cancelled checks
- After approved, funding is automatically transferred into the bank account listed on the Form 498
 - Reimbursements no longer flow through the vendors
- BEAR Remittance Statements sent to Form 486 contact and Remittance Contact (listed on the 498)
- Applicants could potentially receive BEAR reimbursements within 2-3 days of BEAR submission
 - Category 2 BEARs often are asked for copies of vendor invoices to substantiate charges

BEAR Remittance E-mail Sample

Email Subject line: "Your E-Rate Program Remittance Statement"



Helping Keep Americans Connected | www.usac.org

**SCHOOLS AND LIBRARIES BEAR PROGRAM REMITTANCE STATEMENT
AS OF MONTH DAY, YEAR**

Attn: Applicant Remittance Contact Person
Applicant Payee Name

RE: FCC Form 498 ID 443XXXXXX

This notice provides an explanation of your entity's Billed Entity Applicant Reimbursement (BEAR) payment for the following invoices.

	Approved
Document Date SPIN SP Name FRN Work Order Number Applicant Name: XXXXXXXXXXXX; SLD Invoice Number:XXXXXXXX;BEAR Letter Date:MM/DD/YYYY; Line Item Detail Number:XXXXXXXX;Amount Requested:XXXXX.XX;	\$100.00
Document Date SPIN SP Name FRN Work Order Number Applicant Name: XXXXXXXXXXXX; SLD Invoice Number:XXXXXXXX;BEAR Letter Date:MM/DD/YYYY; Line Item Detail Number:XXXXXXXX;Amount Requested:XXXXX.XX;	\$100.00
Total Approved Disbursement	<u>\$200.00</u>
Total Actual Disbursement:	<u>\$200.00</u>

\$0-Funded BEARs

- If your BEAR approval letter lists \$0 as the disbursement amount, you must do one of the following:
 - 1) If the invoice deadline has not passed, resubmit the BEAR with the accurate information
 - If you are unsure what was inaccurate on the BEAR, call CSB at 888-203-8100 and ask
 - *The most common reason a BEAR is \$0-funded is due to an inaccurate date listed in Item 10*
 - 2) If the invoice deadline HAS passed, submit an appeal to USAC (in EPC) within 60 days of the BEAR letter, requesting an additional 30 days to submit the corrected BEAR

[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#)
[Appeal](#) | [Manage My Organization](#) | [USAC Website](#) | [Contact Us](#) | [Help](#)