



Schools and Libraries (E-rate) Program

---

# Consultant Webinar

September 6, 2016

## About the consultant webinar

- Schools and Libraries (E-rate) Program updates and information relevant for service providers
- Every other Tuesday
- Agenda topics by audience request
  - Submit yours by the Friday at noon EDT
  - Use “Questions and Comments” section on the registration form

## Today's Presenters

### **Catriona Ayer**

*Senior Director, E-rate Program*

### **Leslie Frelow**

*Director, Program Integrity Assurance (PIA)*

### **Mick Kraft**

*Senior Manager, Invoicing*

### **John Noran**

*Senior Manager, Customer Service*

### **Tom Nesbitt**

*Senior Manager, Technology*

### **Kathryn Goffredi**

*Moderator*

## Agenda

- **Applicant FCC Form 498**
  - Relationship to BEAR invoicing
  - Approval process
  - FAQs
- **Open Q&A**



E-rate Consultant Webinar

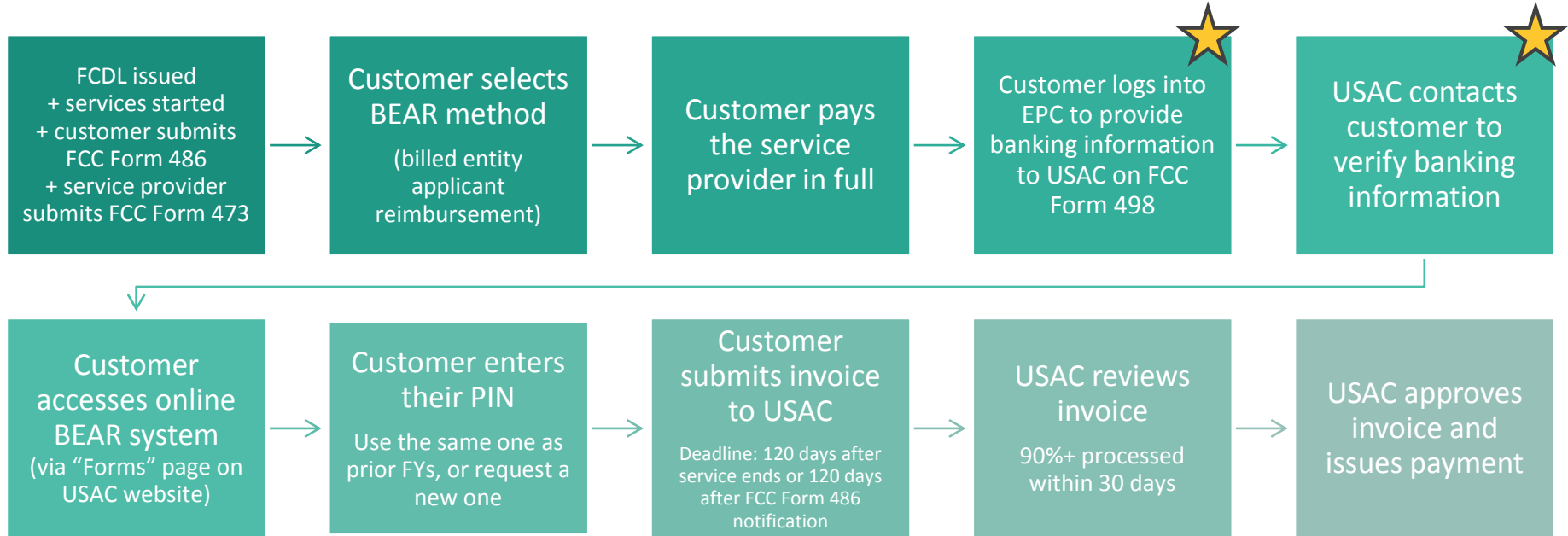
---

# Applicant FCC Form 498

## Context: FCC Form 498

- Two invoicing methods available
  - BEAR = billed entity applicant reimbursement
  - SPI = service provider invoice
- For BEAR invoicing:
  - Use FCC Form 498 to provide the applicant's banking information to USAC
  - Use PIN to access online BEAR – obtained from CSB
  - E-rate funding paid directly to organization's bank account

## FY2016 invoicing process (BEAR)



## Approval Process


1. Assign roles and permissions to school/library official (in EPC)
  - School or library official: Must be an employee of the school/library in a position of authority; cannot be a consultant
  - General financial contact: Can be a consultant
2. File an FCC Form 498 in the E-rate Productivity Center (EPC)



## FCC Form 498 in EPC

1. Under the “Records” tab, select “Applicant Entities”
2. Select “Related Actions” (on left menu)
3. Create FCC Form 498

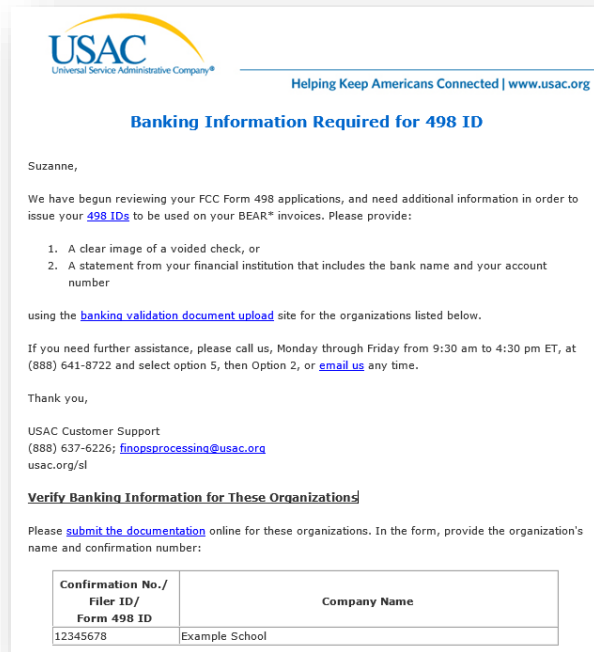
User guide available on our website.




The screenshot displays the USAC EPC interface. At the top, there are navigation tabs: News, Tasks (6), Records, Reports, and Actions. The 'Records' tab is selected. Below the tabs, the page title is 'Records / Applicant Entities' and the main heading is '#106 - Einstein Library 2'. On the left side, there is a vertical menu with the following items: Summary, News, Related Actions (highlighted with a red box), Customer Service Cases, Annexes, Related Entities, Consulting Firms, Consortia Organizations, Modifications, and FCC Forms 470. On the right side, there is a list of actions, each with a lightning bolt icon and a description. The actions are: Manage Organization, Create a Customer Service Case, Manage Annexes, Manage Organization Relationships, Create FCC Form 470, and Create FCC Form 498 (highlighted with a red box and a red arrow pointing to it). The description for 'Create FCC Form 498' is 'This function allows you to create an FCC Form 498 for your entity.'

## Approval Process, cont'd

3. During review, USAC contacts the “general financial contact” to verify banking info (1 to 3 days - MWF)
  - Provide a voided check or banking statement upon request
  - Use provided online link
4. USAC approves your FCC Form 498 ID
  - Confirmation email will provide your 498 ID number
  - Appears in online BEAR immediately upon approval
5. Begin BEAR invoicing using FCC Form 472



 Helping Keep Americans Connected | [www.usac.org](http://www.usac.org)

**Banking Information Required for 498 ID**

Suzanne,

We have begun reviewing your FCC Form 498 applications, and need additional information in order to issue your [498 IDs](#) to be used on your BEAR® invoices. Please provide:

1. A clear image of a voided check, or
2. A statement from your financial institution that includes the bank name and your account number

using the [banking validation document upload](#) site for the organizations listed below.

If you need further assistance, please call us, Monday through Friday from 9:30 am to 4:30 pm ET, at (888) 641-8722 and select option 5, then Option 2, or [email us](mailto:finopsprocessing@usac.org) any time.

Thank you,

USAC Customer Support  
(888) 637-6226; [finopsprocessing@usac.org](mailto:finopsprocessing@usac.org)  
[usac.org/sl](http://usac.org/sl)

**Verify Banking Information for These Organizations**

Please [submit the documentation](#) online for these organizations. In the form, provide the organization's name and confirmation number:

Confirmation No./ Filer ID/ Form 498 ID	Company Name
12345678	Example School

## Questions submitted in advance

1. How to include 2 banking accounts on FCC Form 498?
2. Can consultants be notified when FCC Form 498 is approved? Currently notifications only go to the financial contact.
3. Where can we verify whether USAC has received/processed FCC Form 498?
4. How to handle schools/libraries that use an EIN instead of FCC RN? EIN users are being denied.
5. Can I file FCC Form 472 (the BEAR form) prior to 498 approval?

## Thank you!

Thank you for joining us at today's webinar!

Visit our website, [usac.org/sl](https://usac.org/sl), to:

- Sign up for next week's webinar (and submit questions in advance)
- Sign up for webinar reminders (click "subscribe" in the upper-right corner)

For questions about the E-rate Program:

- Use "Submit a Question" on our website
- Call (888) 203-8100
- **John Noran:** [john.noran@usac.org](mailto:john.noran@usac.org)
- **Mick Kraft:** [michael.kraft@usac.org](mailto:michael.kraft@usac.org)

## E-rate Program online tools

### E-rate Productivity Center

- New online application system!
- Still in development
- Forms 470, 471, 486, applicant 498

### E-File

- Service provider account management
- FCC Form 498
- FCC Form 473 SPAC
- FCC Form 474

### Legacy “Apply Online” system

- Legacy system; being phased out
- Some forms still in here while we work to move them to EPC
- Form 472 BEAR

### usac.org/sl online tools

- On our public website, [usac.org/sl](https://usac.org/sl)
- Search funding commitments
- View/download Form 470s