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## Schools and Libraries News Brief

June 26, 2009

**TIP OF THE WEEK:** Start organizing your documentation for FY2008 recurring services – customer bills, discount calculations, requests for SPIN changes and/or service substitutions, and so on – so that you can complete your invoicing activities in a timely manner. The deadline for receiving FY2008 recurring services is June 30 and the deadline for submitting invoices to USAC (BEAR Forms or SPI Forms) for those services is October 28, 2009.

**UPDATE:** Registration is now available for the [training session in Portland, Oregon on October 15](#).

### Commitments for Funding Years 2009 and 2008

**Funding Year 2009.** USAC will release FY2009 Wave 10 Funding Commitment Decision Letters (FCDLs) June 30. This wave will include commitments for approved Priority 1 requests (Telecommunications Services and Internet Access) for schools and libraries at all discount levels. As of June 26, FY2009 commitments total just under \$451 million.

**Funding Year 2008.** USAC will release FY2008 Wave 58 FCDLs July 1. This wave will include commitments for approved Internal Connections and Basic Maintenance requests at 88% and above and denials at 86% and below. As of June 26, FY2008 commitments total over \$2.32 billion.

On the day the FCDLs are mailed, you can check to see if you have a commitment by using USAC's [Automated Search of Commitments](#) tool.

### What Should I Be Doing This Summer?

Both applicants and service providers can, with a few simple steps, make sure applications continue to be reviewed, invoices continue to be paid, and documents continue to be processed during the summer months. In the [June 19 SL News Brief](#) we discussed tips for applicants; below are a few tips for service providers to help speed these forms and requests along:

#### SERVICE PROVIDERS

##### 1. Verify your online access to the E-File System.

Service providers file [Form 498, Service Provider Identification Number and Contact Information Form](#) to obtain a Service Provider Identification Number (SPIN). USAC also issues login information for our online E-File System to each service provider that successfully files this form. With this login information, you can access the E-File System to revise your Form 498, assign permissions to employees at your company for online access to specific actions, approve BEAR Forms filed by applicants, and perform other functions.

To get access to your login information:

- If you filed Form 498 on or before October 2005 and have not filed a revision to your form, you will have to file a revision on paper before USAC can send you login information.
- If you filed an original or revised Form 498 after October 2005, you can access [USAC's E-File System](#) with the login information provided by USAC.
- Call USAC's Customer Resource Management Center at 1-888-641-8722 if you have questions or you don't know or can't locate your login information. (Note that you should choose option 3, FCC Form 498 – **NOT** option 1, Schools and Libraries.)

##### 2. Review your Form 498 and update any information that has changed.

USAC uses the information on the original or most current revision of your Form 498 to contact you by email, to prepare payment information, and for other communications. Applicants also rely on the service provider information in USAC's [SPIN Contact Search tool](#) which pulls directly from the most recent Form 498 information. For these and other reasons, it is important to keep this information up-to-date.

Service providers that participate in the Schools and Libraries Program should maintain current contact information for the general contact (Block 2), Schools and Libraries contact (Block 11), and company officer on the Form 498 (Block 14). If you participate in other Universal Service Fund programs, you can provide contact and payment information for those programs as well.

If you have not designated a Schools and Libraries contact – or if any information on your form needs to be updated – you can easily file a revision to your Form 498. If you have login information, you can update your Form 498 online. Otherwise, follow the instructions above to file a revision to your form or to contact USAC for assistance.

### **3. Monitor the progress of any paper forms you submit to USAC.**

USAC continues to process paper forms during the summer. For service providers, this includes the [Form 473, Service Provider Annual Certification \(SPAC\) Form](#) and the [Form 474, Service Provider Invoice \(SPI\) Form](#). In fact, if you have not already filed Form 473 for FY2009, now is a good time to do so. Be sure to use the April 2007 version of the form. Remember that USAC will not pay invoices for FY2009 unless the service provider has successfully filed a Form 473 for FY2009.

If USAC cannot data enter your paper form because of inconsistent or missing information, someone from Problem Resolution will contact you to obtain the information we need to complete the processing of your form.

Contact procedures for the summer period are now in effect. This means that if Problem Resolution attempts to contact you on or after May 22 and that contact is unsuccessful, your paper form will be put on hold and we will not attempt to contact you again until after September 11. Although these procedures were established to avoid penalizing school applicants when schools are in recess, they apply to other applicants and also to service providers.

If you were on vacation or otherwise unavailable on or after May 22 and you believe we have put your paper form on hold, you can respond to our original request or you can call the Client Service Bureau at 1-888-203-8100 and ask us to locate and process your paper form.

Remember that you can also file Form 474 [online](#) or [electronically](#) and obviate the need for USAC to process a paper form.

### **4. Complete your activities related to billing customers and invoicing USAC for any remaining FY2008 recurring services.**

June 30, 2009 is the last day to receive recurring services for FY2008. The deadline to invoice USAC for those services is October 29, 2009.

Now is a good time to review the recurring services you have provided during FY2008.

- If you provide discounted bills to your customer and then file SPI Forms:

- Send out all remaining customer bills for the non-discount portion of the services.
- Remind your customers that they are expected to pay your bills within 90 days.
- Respond promptly to USAC requests for information, such as service certifications.

- If you bill your customer in full and your customer files BEAR Forms:

- Bill your customer for the full cost of the service and remind your customer to pay your bill in full before filing a BEAR Form.
- Remind your customer not to wait until the last minute to file a BEAR Form, as you may need time to review it.
- Review each BEAR Form before you approve it.
- Respond promptly to USAC requests for information, such as service certifications.
- Pass the BEAR Form reimbursement amount to your customer within 20 days of receiving it.

### **5. Log in to the E-File System once a week to check for BEAR Forms filed online.**

Applicants continue to file [Form 472, Billed Entity Applicant Reimbursement \(BEAR\) Forms](#) online and on paper during the summer. If a BEAR Form is filed online, the service provider identified on the form must approve the form online before USAC can process it.

Although USAC sends an email to the service provider immediately after an applicant certifies a BEAR Form online, it is not necessary to wait for the email before taking action. If you login to the E-File System once a week and review any BEAR Forms awaiting approval, you will not miss any that might otherwise age out of the system and have to be resubmitted.

Remember that simply clicking on the button at the bottom of an online BEAR Form **rejects** the form in its entirety. To approve all or part of a BEAR Form, you must first affirmatively check the box to the right of each line that you approve or check the box that approves all lines. If you click the button at the bottom of the form with no lines checked, the form will be rejected and the applicant will be required to resubmit the form.

#### **6. Assist applicants with responses to PIA review questions if asked.**

Applicants may need your help responding to technical or contractual questions from Program Integrity Assurance (PIA). Often a network diagram or other technical information supplied by the service provider will clarify a situation and allow the PIA reviewer to proceed with the application review process.

- If you are on a conference call with the applicant and a PIA reviewer, it would help the applicant if you can summarize the information you provide in an email or other written format. You could also remind the applicant that taking notes is a good idea.
- If you contact a PIA reviewer without the applicant, send the applicant a summary of the information you provide.
- If you send any documentation to a PIA reviewer, copy the applicant on your response.

#### **7. Review FY2010 Forms 470 filed by applicants.**

Form 470 for FY2010 has been available for posting to the USAC website starting in April 2009. Although most applicants wait until the fall preceding the start of the funding year to post Forms 470, applicants with long procurement cycles, state replacement contracts, or other situations may already be posting their forms.

If you are interested in reviewing these forms, you can use the [Form 470 Search Posted tool](#) to display individual forms or the [Form 470 Download tool](#) to download a comma-delimited file containing certain blocks or all blocks of data on these forms. You can find both of these tools on the [Search Tools page](#) on the USAC website.

- If you try to access either tool and you get a timeout message, click the link a second time and you should then be able to access the tool.
- If you use the Form 470 Download tool to create and download a file, you can then open the file in a spreadsheet program and sort the data yourself.

#### **8. Label and file program-related documents.**

FCC rules require both applicants and service providers to retain documentation related to the application for, receipt and delivery of discounted services for five years after the last date to receive service. The best time to file and store those documents is when they are final and you have finished using them.

Most of the documentation needed by auditors and for other program reasons is maintained by applicants. However, service providers have copies of contracts, evidence of payment of customer bills, SPI Forms, and other useful program information. Remember that you can store information electronically – for example, by scanning paper documents and archiving the scanned files.

If you store files electronically, keep in mind that you should use naming conventions that allow you to easily identify and retrieve documents that relate to a particular customer or application.

#### **9. Consider attending applicant training in the fall.**

USAC generally provides service provider training at two locations in the spring and applicant training at a number of locations in the fall. This year, USAC has scheduled applicant training in eight locations during the months of September and October.

While the focus of the training is on applicant issues, service providers are welcome to attend training as well. For a list of training locations and hotel information, you can visit the [2009 Schools and Libraries Fall Applicant Training page](#) on the USAC website.

Remember that USAC does not charge a registration fee to attend the training.

### **Special Edition News Brief Series on Audits**

Next week, USAC will issue a series of Special Edition News Briefs summarizing the information from the latest round of audits conducted under the Improper Payments Improvement Act (IPIA). The series will discuss the four subject areas where findings and comments from this round of audits were the most common: discount calculations, document retention, eligible services, and technology plans.

Note that there will not be a regular SL News Brief issued on Friday, July 3 due to the observance of the July 4 holiday.

You may download and print copies of [Schools and Libraries News Briefs](#) on USAC's website. You may [subscribe](#) to or [unsubscribe](#) from this news brief. For program information, please visit the [Schools and Libraries area](#) of the USAC website, [submit a question](#), or call us toll-free at 1-888-203-8100. Feel free to forward this news brief to any interested parties.

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