



E-rate 2024 Workshop 3: PIA Review, Form 486, and Invoicing

Massachusetts Board of Library
Commissioners
April 25, 2024



Before We Start...

- Slides/Updates:
 - Accurate to the best of our knowledge as of 4/24/2024) but...expect more changes
- Most updates are in SLD's News Brief issued generally monthly
 - Subscribe or view online on SLD web site
(<https://www.usac.org/e-rate/learn/news-brief/>)
- Basic training videos available online at in USAC's Learn page at <https://www.usac.org/e-rate/learn/>



Before We Start...

- Questions are welcome!
 - Goal to is make session as useful as possible to you
 - Please save your questions until the end of the presentation
 - Please try to note slide #'s if you have a question about them
 - Q&A at end of session for as long as you need it



Quick Webinar Preview

- Quick Program Overview
- PIA Review
- Form 486
- Invoicing
- Common Issues and Remedies
- ECF Update/Reminder



Quick Program Overview



Application Steps and Deadlines

- E-rate requires annual applications
- Funding years mostly don't overlap, but application processes do
- Important to remember where you are in the process for each funding year

	<u>2023</u>												<u>2024</u>												<u>2025</u>											
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
FY2023	[Red]												[Red]												[White]											
FY2024	[White]				[Yellow]								[Yellow]																							
FY2025	[White]												[White]				[Blue]				[Blue]															

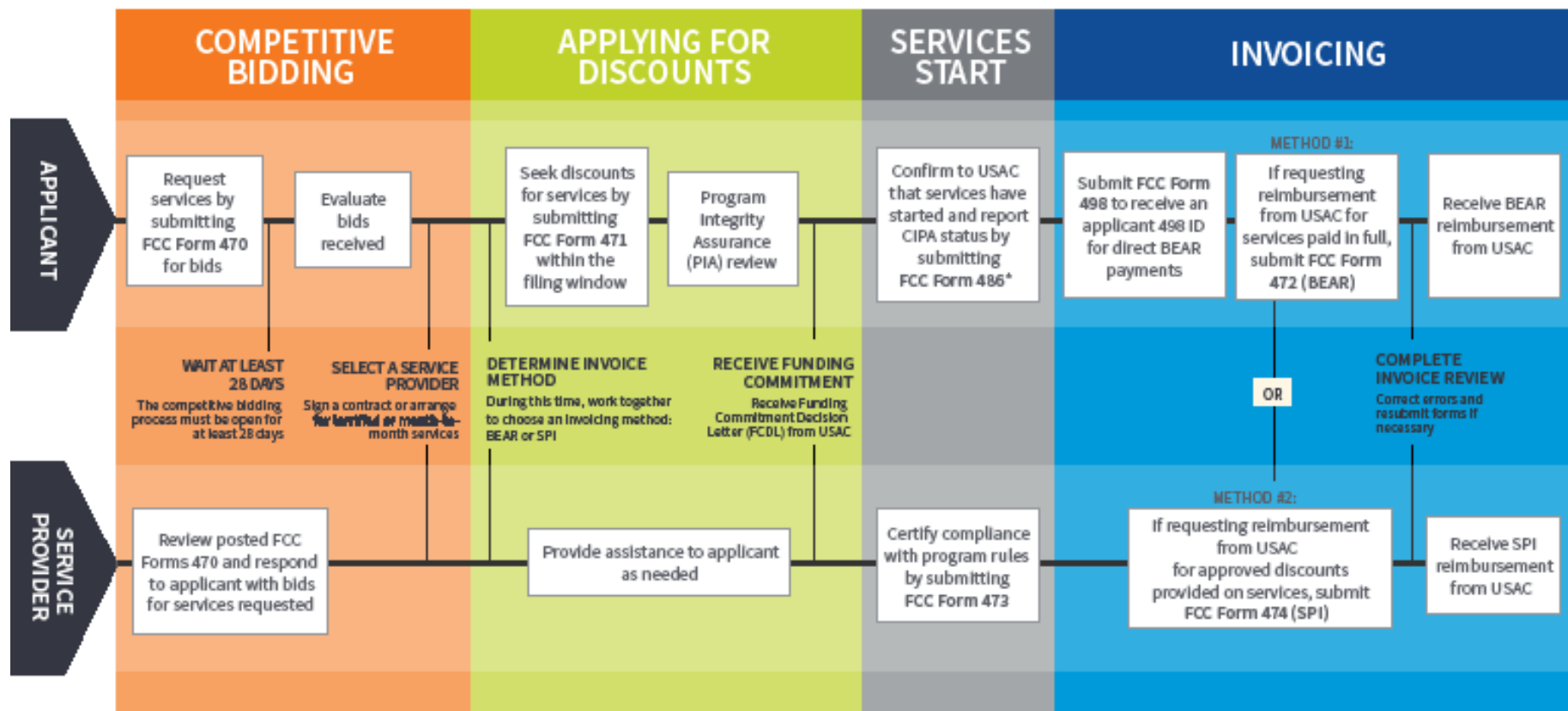


Schools and Libraries (E-rate) Program APPLICATION PROCESS

BEFORE YOU BEGIN:

APPLICANTS: Applicants must first have an entity number and an E-rate Productivity Center (EPC) account.

SERVICE PROVIDERS: Service providers must first obtain a Service Provider Identification Number (SPIN /service provider 498 ID) by submitting FCC Form 498.



FOR MORE INFORMATION:

- Website: The application process is broken down in detail for both applicants and service providers on the Schools and Libraries Program website (www.usac.org/sl).
- Glossary of Terms: Definitions for program terms and acronyms.
- *Consortium members report their CIPA status by submitting the FCC Form 479 to their consortium leader. The consortium leader then files the FCC Form 486.
- To adjust funding commitments and/or modify the dates for receipt of services after the FCDL is issued, file the FCC Form 500.



Application Steps and Deadlines

- Dates are somewhat flexible (but deadlines are not)
- Procurement/competitive bidding: Fall and early Winter prior to the Funding Year (includes Form 470)
- Contract Award and Form 471: ~Jan – Mar prior to the Funding Year
- *PIA Review: ~Spring prior to/Summer of Funding Year*
- *Form 486: ~Summer/early Fall of Funding Year*
- *Invoicing: either during or ~Summer/Fall after Funding Year*

Application Steps and Deadlines: PIA Review



- **Program Integrity Assurance** (PIA) review takes place after the Form 471 has been filed
 - Goal is to review and process Form 471 in order to make award
 - PIA review can happen immediately after filing or months after filing, can be intensive or no questions at all
 - Critical to monitor e-mail or EPC to know when questions are posed (and be sure they're not missed) due to strict deadlines

Application Steps and Deadlines: Form 486



- Form 486 filed within 120 days of start of service or 120 days of receipt of Funding Commitment Decision Letter, whichever is later
 - Filing late will progressively cost you funding
- Allows invoicing to start and includes CIPA certification

Application Steps and Deadlines:

Invoicing



- Invoicing can take place during or immediately after Funding Year
 - Must be completed in a timely fashion or you forfeit the funding
- Can be done by vendor or applicant
- Invoicing (and invoicing review) now happens in EPC... (sort of)



Application Steps and Deadlines: Audits

- Audits typically take place after the fact
- Many different kinds of audits with different levels of detail
 - Critical to keep all your documentation to demonstrate compliance



E-rate Program: Different Roles

- Role of Consultants
 - *Your* consultants can:
 - Help you with your application, including filing
 - Answer PIA review questions for you
 - Assist you with every step
 - Your consultants should not:
 - Conduct your procurement or evaluation
 - File applications without your active input
 - Undertake actions without your knowledge and assent



E-rate Program: Different Roles

- Roles of Library Staff
 - E-rate cuts across three main areas of responsibility:
 - Technology
 - Business/Financial/Operations
 - Executive
 - Different libraries divide responsibilities differently
 - Critical to keep all levels involved/informed



E-rate Program: EPC

- E-rate Productivity Center
 - portal.usac.org
 - Everyone involved in your E-rate process should have an account
 - Account setup is a somewhat unusual multistep process
 - Can work with you individually



PIA Review



PIA Review

- Program Integrity Assurance review designed to ensure compliance with program rules
- All PIA review is done through EPC
 - Notification *should* come via email with a link to go directly to the PIA question area
 - Good to check EPC regularly just in case
 - Questions/responses all in EPC



PIA Review

- PIA review varies widely
 - Some applications get no questions at all while others get many
 - Questions can be extremely general or extremely specific
 - Goal is to ensure compliance with program rules -- it's important to understand the rules behind the questions since the questions are often misleading
 - Can be used to make allowable corrections to the forms



PIA Review

- PIA review varies widely (cont'd)
 - All questions are on a timer (typically 15 days)
 - Some follow up questions have drastically shorter timers
 - Critical to answer questions before timer runs out
 - Can always request extensions
 - Generally unanswered questions result in applications being denied
 - Libraries CAN work with vendors to answer the questions



PIA Review

- Three ways to check for PIA questions:
 - Easy Way: follow link in email
 - Less Easy Way:
 - Log into EPC
 - Select "Form 471" for the "Type" and "2024" for the Funding Year under "Pending Inquiries"
 - Click "Apply Filters"
 - If there are any requests, they will show in the list between "Pending Inquiries" and "Notifications"
 - Click on the "Inquiry Name"

My Consultant Landing Page



[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#) | [FCC Form 500](#) | [SPIN Change](#)
| [Appeal](#) | [Service Substitution](#) | [EPC E-Rate Invoicing](#) | [USAC Website](#) | [Contact Us](#) | [Help](#)

Welcome [blurred]

▼ Pending Inquiries



Type

Funding Year

Application/Request

BEN

[APPLY FILTERS](#) [CLEAR FILTERS](#)

Pending COMAD Inquiries are not included.

BEN	Application/Request Number	Type	Nickname	Inquiry Name	Outreach Type	Date Sent	Due Date ↑	Extn.	Status
[blurred]	[blurred]	FCC Form 471	[blurred]	Requested Discount	E-rate Review Information	4/15/2024 1:59 PM EDT	4/30/2024	0	Saved & Waiting to submit
[blurred]	[blurred]	FCC Form 471	[blurred]	Requested Discount	E-rate Review Information	4/15/2024 2:02 PM EDT	4/30/2024	0	Saved & Waiting to submit



PIA Review

- The Hard(er) Way to Check for PIA Questions
 - Log into EPC
 - Click on the name of the applicant (if applicable)
 - Click “FCC Forms” on the top
 - Select “Form 471” and the appropriate funding year from the drop downs
 - Click on the application in question

My Applicant Landing Page



[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#) | [Appeal](#) | [IDD Extension](#) | [FCC Form 500](#) | [SPIN Change](#) | [Service Substitution](#) | [Manage Users](#) | [Manage Organizations](#) | [EPC E-Rate Invoicing](#) | [USAC Website](#) | [Contact Us](#) | [Help](#)

Welcome **Library System 10036!**

Pending Inquiries

Type

Application/Request

Funding Year

APPLY FILTERS

CLEAR FILTERS

Pending COMAD Inquiries are not included.

Application/Request Number	Type	Nickname	Inquiry Name	Outreach Type	Date Sent	Due Date	↑	Extn.	Status
No records available.									

Records / Applicant Entities

#1529 - Library System 10036

 [CREATE A NEW USER](#) [ADD OR REMOVE EXISTING USERS](#) [MANAGE USER PERMISSIONS](#) [...](#)

- Summary**
- Customer Service
- Modifications
- Additional Information
- Discount Rate
- Category Two Budget
- Contracts
- FCC Forms
- FRN Appeals
- News

Related Actions



Organization Details

Name Library System 10036
Entity Number 1529
FCC Registration Number 0123456780

Applicant Type Library System
Status Active

Contact Information

Physical Address 39 Maryland Ave
Rockville, MD 20850
Montgomery
Mailing Address 39 Maryland Ave
Rockville, MD 20850
Montgomery

Phone Number 012-345-6789
Email library_sys_10036@mailinator.com
Website URL www.library10036.lib.ks.us

Account Administrator

Records / Applicant Entities

#1529 - Library System 10036

CREATE FCC FORM 470 CREATE FCC FORM 471 CREATE FCC FORM 486 ...

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

Category FCC Form 471

FCC Forms 471

Funding Year 2023

- Status All
 Incomplete
 Certified
 Committed

Application Number	Nickname	Funding Year	Status	Certified Date
231000024	2023 Training	2023	Certified	1/20/2023 9:30 AM EST
231000041	Training January 2023 Internet Access	2023	Certified	1/25/2023 11:45 AM EST

Records / FCC Forms 471

State Training 2024 - #241000033



- Summary**
- Funding Requests
- Review Inquiries
- Deferral History
- Discount Calculation
- Entity Information
- News
- Related Actions



Incomplete Certified In Review Outreach Wave Ready Committed

Review Status Awaiting Initial Review

Application Information

Nickname	State Training 2024	Created Date	1/22/2024 9:12 AM EST
Application Number	241000033	Created By	FirstName LastName
Funding Year	2024	Certified Date	1/22/2024 9:30 AM EST
Window Status	In-Window	Certified By	FirstName LastName
Category of Service	Category 2	Last Modified Date	1/22/2024 9:30 AM EST
		Last Modified By	FirstName LastName

Billed Entity Information

Records / FCC Forms 471

REQUEST EXTENSION
 RESPOND TO INQUIRIES
 SUBMIT MODIFICATION REQUES...

[Summary](#)
[Funding Requests](#)
[Review Inquiries](#)
[Deferral History](#)
[Discount Calculation](#)
[Entity Information](#)
[News](#)
[Related Actions](#)

Pending Inquiries

Read	Notice	Name	Outreach Type	Assigned By	Title	Phone #	Assigned Date ↓	Due Date	Extn.	Status
		Requested Discount	Regular 15-Day	[Redacted]	E - Rate Reviewer	833-205-1185 Ext.58685	4/15/2024 2:02 PM EDT	4/30/2024	0	Saved & Waiting to submit
		Requested Discount	Regular 15-Day	[Redacted]	E - Rate Reviewer	833-205-1185 Ext.58685	4/15/2024 1:59 PM EDT	4/30/2024	0	Saved & Waiting to submit

Submitted Inquiries

Name	Outreach Type	Answered By	Assigned Date ↓	Answered Date
Eligibility of Products and Services	Regular 15-Day Incomplete Response Reminder	Aleck Johnson	4/15/2024 2:13 PM EDT	4/16/2024 11:46 AM EDT
Eligibility of Products and Services	Regular 15-Day	Aleck Johnson	4/12/2024 3:42 PM EDT	4/15/2024 8:27 AM EDT
Eligibility of Products and Services	Regular 15-Day	Aleck Johnson	4/12/2024 2:28 PM EDT	4/15/2024 8:27 AM EDT
Fiber Special Construction	Regular 15-Day	Aleck Johnson	3/25/2024 3:28 PM EDT	3/25/2024 3:54 PM EDT



PIA Review

- Responding to PIA Inquiries:
 - If you have inquiries listed, click on “Respond to Inquiries” at the top
 - Then click on the “Name” of the individual inquiry to get the questions asked
 - You can save responses without submitting them by hitting “Save” rather than “Submit”
 - You can also request extensions using the “Request Extension” button at the top of the page



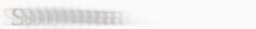



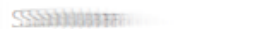

Records / FCC Forms 471...

 REQUEST EXTENSION
  RESPOND TO INQUIRIES
  SUBMIT MODIFICATION REQUES...

[Summary](#)
[Funding Requests](#)
[Review Inquiries](#)
[Deferral History](#)
[Discount Calculation](#)
[Entity Information](#)
[News](#)
[Related Acti](#)



Pending Inquiries

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		Requested Discount	Regular 15-Day	 	E - Rate Reviewer	833-205-1185 Ext.58685	4/15/2024 2:02 PM EDT	4/30/2024	0	Saved & Waiting to submit
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Eligibility of Products and Services	Regular 15-Day	Aleck Johnson	4/12/2024 2:28 PM EDT	4/15/2024 8:27 AM EDT

Records / FCC Forms 471



Summary Funding Requests Review Inquiries Deferral History Discount Calculation Entity Information News **Related Actions**

Pending Inquiries

<input type="checkbox"/>	Read	Notice	Name	Outreach Type	Assigned By	Title	Phone #	Assigned Date ↓	Due Date	Extn.	Status
<input type="checkbox"/>			Requested Discount	Regular 15-Day	[Redacted]	E - Rate Reviewer	833-205-1185 Ext.58685	4/15/2024 2:02 PM EDT	4/30/2024	0	Saved & Waiting to submit
<input type="checkbox"/>			Requested Discount	Regular 15-Day	[Redacted]	E - Rate Reviewer	833-205-1185 Ext.58685	4/15/2024 1:59 PM EDT	4/30/2024	0	Saved & Waiting to submit

CLOSE



Submitted Inquiries

Name	Outreach Type	Answered By	Assigned Date ↓	Answered Date
Eligibility of Products and Services	Regular 15-Day Incomplete Response Reminder	Aleck Johnson	4/15/2024 2:13 PM EDT	4/16/2024 11:46 AM EDT
Eligibility of Products and Services	Regular 15-Day	Aleck Johnson	4/12/2024 3:42 PM EDT	4/15/2024 8:27 AM EDT
Eligibility of Products and Services	Regular 15-Day	Aleck Johnson	4/12/2024 3:38 PM EDT	4/15/2024 8:27 AM EDT



This page will timeout after an extended period of inactivity. Please periodically save your work using the 'Save & Close' button below. You may then use your browser's 'Back' button to return to your work.

Your response to PIA's questions:

#	Question	Response
1	Is the school listed above an independent school not affiliated with any school district or a central administrative agency?	--Yes / No--
a	If Yes, please provide a written confirmation of the school's independent status in writing from a school official. On the e-mail or letter, please provide the name and title of the school official providing the response. You have no further questions.	UPLOAD  Drop file here
b	If No, please provide the following: Please provide the Entity Name and Number (BEN) of the school district or central administrative agency that operates the school listed above. Note: If the school district or central administrative agency does not have a BEN, please contact E-Rate's Customer Service Center at 1-888-203-8100 or create a Customer Service Case in EPC via clicking Contact Us on your entity landing page to obtain a new BEN then provide the new BEN.	---
	Please provide third-party documentation of all schools that fall under the authority of the School District/Central Administrative Agency provided above such as an official state report or web site, or a letter from your State Department of Education (on state letterhead and signed by a chief official at the State Department of Education, accompanied with documentation from the source of provided data) verifying all the schools that fall under the authority of this School District/Central Administrative Agency.	UPLOAD  Drop file here
2	If you would like to provide any additional information about these issues that have not been addressed above: Use the text box to type information, or upload additional documentation using the "Browse" button.	

File Upload

Document	Corresponding Question
No items available	

[Add Document](#)

DELETE UPLOADED FILES

SAVE & CLOSE

SUBMIT



PIA Review

- Common C1 Questions/Modifications
 - Explanation of the services provided (WAN/IA)
 - Explanation of costs (esp. if taxes or multiple services are included in one line item)
 - They will (usually) break taxes or other services out into new line items
 - Removal of ineligible items or items delivered prior to funding year
 - Modification of eligibility percentages
 - Discount Calculation changes



PIA Review

- Common C2 Questions/Modifications
 - C2 Budget allocation
 - Square footage
 - Explanation of Costs (even if in contract) – make, model, quantity
 - Modification of eligibility percentages
 - Modification of type of service (IC, BMIC)
 - Modification of the classification (switch/transceiver/module)
 - Discount Calculation



Common PIA Review Issues

- Failure of applicant to respond to PIA inquiries
- Failure of PIA reviewer to understand applicant responses
- PIA incorrectly modifies applications
 - Changing category of service
 - Changing quantities/amounts...often changed with just a notification and minimal time to respond



PIA Review Gotchas

- Be sure to answer all PIA questions
 - Even the “if yes, then...” when your answer is “no.”
- Be sure to submit your PIA response (bottom right)
- Request extension if you need it
- Email erate@mblc.state.ma.us or your coordinator (me or Kate) for help if you are unclear on what is being requested
 - Questions often poorly worded, so make sure you understand the real question behind the question!



Post PIA Review

- USAC will issue the Form 471 Funding Commitment Decision Letter (FCDL)
 - In order to get the details, needs to be "generated" within EPC by the user
 - Will then be linked in "News" and under "Notifications"
 - Two parts – announcement (PDF) and spreadsheet (XLS)
 - Keep these for your records!
 - If everything is correct, applicant can file the Form 486
 - If errors, appeal to USAC within 60 days



Form 486



Form 486

- Form 486 is available in EPC from:
 - Landing Page (at top right, either at top level or under drop down)
 - under “Related Actions” and “Create FCC Form 486” from within Applicant profile page
- What Form 486 Does:
 - Confirms receipt of services
 - Confirms compliance with CIPA
 - Allows invoices to be filed



486 Sidebar: Understanding CIPA

- When does CIPA apply?
 - When library-owned computers access E-rate supported services or equipment, the library-owned computers must be CIPA compliant
- Components of CIPA:
 - Internet Safety Policy
 - Technology Protection Measure
 - Public Notice and Hearing (or Meeting)



486 Sidebar: Understanding CIPA

- Internet Safety Policy must address:
 - Access by minors to inappropriate content
 - Safety and security of minors when using email, chat rooms, etc.
 - Unauthorized access – hacking, etc. – by minors
 - Unauthorized disclosure, use, and dissemination of personal information by minors
 - Measures designed to restrict minors' access to material deemed harmful to minors (filter)



486 Sidebar: Understanding CIPA

- Technology Protection Measure
 - Must be installed and active
 - No requirements about restrictiveness or effectiveness beyond “restrict minors’ access to material deemed harmful to minors”
 - Applies to “its computers” (library computers)
 - Does not apply to library user-owned computers



486 Sidebar: Understanding CIPA

- Public Notice and Hearing
 - Library must have a meeting open to the public to discuss the Internet Safety Policy and Technology Protection Measure
 - Must be some form of public advertisement of the meeting
 - Typically website or local paper
 - Must be some record of the meeting
 - Typically minutes or other notes



486 Sidebar: Understanding CIPA

- CIPA and Audits
 - Must be able to document compliance:
 - Internet Safety Policy
 - Copy of policy
 - Technology Protection Measure
 - Logs or other evidence
 - Public Notice and Hearing (or Meeting)
 - Advertisement, website, minutes, newspaper reports, etc.

My Applicant Landing Page



Training
Universal Service
Administrative Co.

[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#) | [Appeal](#) | [IDD Extension](#) | [FCC Form 500](#) | [SPIN Change](#) | [Service Substitution](#) | [Manage Users](#) | [Manage Organizations](#) | [USAC Website](#) | [Contact Us](#) | [Help](#)

Welcome, 486 Training Ind. Library_1000022!

Pending Inquiries

Type

Funding Year

Application/Request

Pending COMAD Inquiries are not included.

Application/Request Number	Type	Nickname	Inquiry Name	Outreach Type	Date Sent	Due Date ↑	Extn.	Status
No items available								

Notifications

Notification Type

Funding Year

Status All
 Generated
 Not Generated

Notification	Description	Issued Date	Generated By	Generated On
--------------	-------------	-------------	--------------	--------------

 SAVE DRAFT

Create FCC Form 486

General Information

Select FRNs

Detailed Info

Certification

Preview

Submitting Organization Details

486 Training Ind. Library_1000022

700 12th St NW #900

Washington, DC 20005

123-456-7890

ab@testmail.usac.org

BEN: 15627

FCC Registration Number: 0123456789

FCC Form 486 Details

Nickname *

Funding Year *

Contact Information

Main Contact Person *

Please select a main contact person by typing the contact person's name or email address.

CANCEL

CONTINUE

 SAVE DRAFT

Select FRNs

Use the filters below to search and select FRNs to associate.

General Information

Select FRNs

Detailed Info

Certification

Preview

Submitting Organization Details

486 Training Ind. Library_1000022

700 12th St NW #900

Washington, DC 20005

123-456-7890

ab@testmail.usac.org

BEN: 15627

FCC Registration Number: 0123456789

Filters

Application Number

FRN

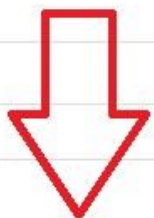
Category of Service

FRN Status

ADD ALL (3) FRNS

CLEAR SEARCH FILTERS

SEARCH



Enter entire Funding Request Number

Funded

ADD ALL (3) FRNS

CLEAR SEARCH FILTERS

SEARCH

<input type="checkbox"/>	FRN	↑ Application Number	FRN Nickname	Category of Service	FRN Status
<input type="checkbox"/>	1699003048	161002881	Cat 1 Funding Request Nickname	Category 1	Funded
<input type="checkbox"/>	1699003409	161003036	Cat 1 Funding Request Nickname	Category 1	Funded
<input type="checkbox"/>	1699003411	161003036	Cat 1 Funding Request Nickname	Category 1	Funded

ADD (0) FRNS

Selected FRNs

<input type="checkbox"/>	FRN	↑ Application Number	FRN Nickname	Category of Service	FRN Status
No FRNs Currently Associated					

You must associate at least one Funding Request

REMOVE (0) FRNS

CANCEL

BACK

CONTINUE

 SAVE DRAFT

FCC Form 486

General Information

Select FRNs

Detailed Info

Certification

Preview

Billed Entity Information

486 Training Ind. Library_1000022

700 12th St NW #900

Washington, DC 20005

123-456-7890

ab@testmail.usac.org

Billed Entity Number: 15627

FCC Registration Number: 0123456789

Applicant Type: Library

Service Information

Please confirm that the information below is complete and accurate for the service(s) that you are confirming. Although it is uncommon, you may need to edit a service start date. To do so, select the FRN(s) you wish to update from the grid below. You may select multiple FRNs.

Please note that the Service Start Date in the below grid is from the FCC Form 471.

<input type="checkbox"/>	FRN	Application Number	FRN Nickname	SPIN	Service Provider	Service Start Date	Actual Service Start Date
<input checked="" type="checkbox"/>	1699003048	161002881	Cat 1 Funding Request Nickname	14010001	USAC Service Provider Organization 1	12/7/2016	12/7/2016

Only if changing Service Start Date!

 SAVE DRAFT

FCC Form 486

General Information

Select FRNs

Detailed Info

Certification

Preview

Billed Entity Information

486 Training Ind. Library_1000022

700 12th St NW #900

Washington, DC 20005

123-456-7890

ab@testmail.usac.org

Billed Entity Number: 15627

FCC Registration Number: 0123456789

Applicant Type: Library

Early Filing

CHECK THE BOX BELOW IF THE FRNS ON THIS FCC FORM 486 ARE FOR SERVICES STARTING ON OR BEFORE JULY 31 OF THE FUNDING YEAR.

The Funding Requests listed in this FCC Form 486 have been approved by USAC as shown in my Funding Commitment Decision Letter (FCDL). I have confirmed with the service provider(s) featured in those Funding Requests that these services will start on or before July 31 of the Funding Year.

Only if filing before 7/1!

CIPA Waiver

CHECK THE BOX BELOW IF YOU ARE REQUESTING A WAIVER OF CIPA REQUIREMENTS FOR THE SECOND FUNDING YEAR IN WHICH YOU HAVE APPLIED FOR DISCOUNTS IF YOU AS THE BILLED ENTITY ARE THE ADMINISTRATIVE AUTHORITY.

I am providing notification that, as of the date of the start of discounted services, I am unable to make the certifications required by the Children's Internet Protection Act, as codified at 47 U.S.C. § 254(h) and (l), because my state or local procurement rules or regulations or competitive bidding requirements prevent the making of the certification(s) otherwise required. I certify that the schools or libraries represented in the Funding Request Number(s) on this FCC Form 486 will be brought into compliance with the CIPA requirements before the start of the Third Funding Year in which they apply for discounts.

CANCEL

BACK

SEND FOR CERTIFICATION

CONTINUE

SAVE DRAFT

FCC Form 486

General Information

Select FRNs

Detailed Info

Certification

Preview

Billed Entity Information

486 Training Ind. Library_1000022
700 12th St NW #900
Washington, DC 20005
123-456-7890
ab@testmail.usac.org

Billed Entity Number: 15627
FCC Registration Number: 0123456789
Applicant Type: Library

Certifications

- I certify that the services listed on this FCC Form 486 have been, are planned to be, or are being provided to all or some of the eligible entities identified in the FCC Form 471 application(s) cited above. I certify that there are signed contracts covering all of the services listed on this FCC Form 486 except for those services provided under tariff or on a month-to-month basis. I certify that I am authorized to submit this receipt of service confirmation on behalf of the above-named Billed Entity; that I have examined this request; and that, to the best of my knowledge, information, and belief, all statements of fact contained herein are true.
- I understand that the discount level used for shared services is conditional, for future years, upon ensuring that the most disadvantaged schools and libraries that are treated as sharing in the services receive an appropriate share of benefits from those services. I recognize that I may be audited pursuant to this application and will retain for at least ten 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, including FCC Forms 479 where required, and, if audited, will make such records available to the Administrator.

CIPA Certifications

- I certify that as of the date of the start of discounted services: a. the recipient(s) of service represented in the Funding Request Number(s) on this FCC Form 486 has (have) complied with the requirements of the Children's Internet Protection Act, as codified at 47 U.S.C. § 254(h) and (l).
- I certify that as of the date of the start of discounted services: Pursuant to the Children's Internet Protection Act, as codified at 47 U.S.C. § 254(h) and (l), the recipient(s) of service represented in the Funding Request Number(s) on this Form 486: (FOR SCHOOLS and FOR LIBRARIES IN THE FIRST FUNDING YEAR FOR PURPOSES OF CIPA) is (are) undertaking such actions, including any necessary procurement procedures, to comply with the requirements of CIPA for the next funding year, but has (have) not completed all requirements of CIPA for this funding year.
- I certify that as of the date of the start of discounted services: The Children's Internet Protection Act does not apply because the recipient(s) of service represented in the Funding Request Number(s) on this FCC Form 486 is (are) receiving discount services only for telecommunications services.

 SAVE DRAFT

FCC Form 486

General Information

Select FRNs

Detailed Info

Certification

Preview

Form Details

Nickname KS Spring 2020 Training

Funding Year 2016

Billed Entity Information

486 Training Ind. Library_1000022

700 12th St NW #900

Washington, DC 20005

123-456-7890

ab@testmail.usac.org

Billed Entity Number: 15627

FCC Registration Number: 0123456789

Applicant Type: Library

▼ Main Contact

Name Library Admin 1000022

Email 486_full_rights_user_ind_library_1000022@testmail.usac.org

Phone Number 123-456-7890

Service Information

FRN	Application Number	FRN Nickname	SPIN	Service Provider	Service Start Date	Actual Service Start Date
1699003048	161002881	Cat 1 Funding Request Nickname	14010001	USAC Service Provider Organization 1	12/7/2016	12/7/2016

Certifications

- I certify that the services listed on this FCC Form 486 have been, are planned to be, or are being provided to all or some of the eligible entities identified in the FCC Form 471 application(s) cited above. I certify that there are signed contracts covering all of the services listed on this FCC Form 486 except for those services provided under tariff or on a month-to-month basis. I certify that I am authorized to submit this receipt of service confirmation on behalf of the above-named Billed Entity; that I have examined this request; and that, to the best of my knowledge, information, and belief, all statements of fact contained herein are true.
- I understand that the discount level used for shared services is conditional, for future years, upon ensuring that the most disadvantaged schools and libraries that are treated as sharing in the services receive an appropriate share of benefits from those services. I recognize that I may be audited pursuant to this application and will retain for at least ten 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, including FCC Forms 479 where required, and, if audited, will make such records available to the Administrator.
- I certify that as of the date of the start of discounted services: a. the recipient(s) of service represented in the Funding Request Number(s) on this FCC Form 486 has (have) complied with the requirements of the Children's Internet Protection Act, as codified at 47 U.S.C. § 254(h) and (i).

SAVE DRAFT

FCC Form 486

General Information

Select FRNs

Certification

Preview

Form Details

Nickname KS Spring 2020 Training

Billed Entity Information

486 Training Ind. Library_1000022

700 12th St NW #900

Washington, DC 20005

123-456-7890

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- I understand that the discount level used for shared services is conditional, for future years, upon ensuring that the most disadvantaged schools and libraries that are treated as sharing in the services receive an appropriate share of benefits from those services. I recognize that I may be audited pursuant to this application and will retain for at least ten 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, including FCC Forms 479 where required, and, if audited, will make such records available to the Administrator.
- I certify that as of the date of the start of discounted services: a. the recipient(s) of service represented in the Funding Request Number(s) on this FCC Form 486 has (have) complied with the requirements of the Children's Internet Protection Act, as codified at 47 U.S.C. § 254(h) and (l).

False statements on this form may result in civil liability and/or criminal prosecution. To electronically sign and certify this form, click "Yes" below. To affirm that you (1) understand the statements above and (2) represent the entity featured, and have the authority to make the certifications, on this form, click "Yes" below.

NO

YES



Invoicing



Invoicing: The Choice is Yours

- Invoicing mode: BEAR or SPI?
 - Applicants determine
 - Technically must indicate prior to filing 471
 - Best practice: indicate in the Form 470 and/or RFP
 - Different implications based on invoicing mode
 - Who is responsible for:
 - Documentation?
 - Accuracy?
 - All charges for FRN must have same invoicing mode



BEAR System Update

- BEAR is now available within the EPC portal (sort of)
 - No longer need separate authentication and login for BEAR
 - Not integrated in terms of look and feel or location
 - New BEAR requires users to have the appropriate permissions within EPC



Rights Changes in EPC

- In order to access the new BEAR, users must be given the appropriate permissions in EPC
- Only “account administrator” has the rights to assign permissions for users at a library

My Applicant Landing Page



Training

- [Funding Request Report](#)
- [FCC Form 470](#)
- [FCC Form 471](#)
- [FCC Form 486](#)
- [Appeal](#)
- [IDD Extension](#)
- [FCC Form 500](#)
- [SPIN Change](#)
- [Service Substitution](#)
- [Manage Users](#)
- [Manage Organizations](#)
- [USAC Website](#)
- [Contact Us](#)
- [Help](#)

Welcome, [Library System 10036!](#)

Pending Inquiries

Type

Funding Year

Application/Request

APPLY FILTERS CLEAR FILTERS

Pending COMAD Inquiries are not included.

Application/Request Number	Type	Nickname	Inquiry Name	Outreach Type	Date Sent	Due Date	↑	Extn.	Status
No items available									

Notifications

Notification Type

Funding Year

Status All Generated Not Generated

Notification	Description	Issued Date	Generated By	Generated On
No items available				

My Entities

Entity	Entity Number	City	State	Zip Code
--------	---------------	------	-------	----------

Manage Users

Existing Organizations

<input type="checkbox"/> Billed Entity Name	City	State
<input checked="" type="checkbox"/> Library System 10036	Rockville	MD

CANCEL

CREATE A NEW USER

ADD AND REMOVE EXISTING USERS

MANAGE USER PERMISSIONS



Create A User for Library System 10036

User Details

User Type

Applicant

First Name *

Job Title *

Last Name *

Phone Number *

Middle Initial

Phone Extension

Email

Email *

Confirm Email *

will be used as the username for the new account

Address

Address Line 1 *

County

Address Line 2

Zip Code *

City *

Zip Code Extension

State *

User Permissions

In the table below, you can designate the permissions that you wish to give to each of your users for the various tasks you can complete in the portal. This table will continue to grow as more functionality comes online.

- Full rights users can start, complete, submit and certify forms.
- Partial rights users can start and enter data in the form, but cannot submit and certify forms themselves.
- View Only users can only see forms created by other people in your organization but cannot create forms themselves.
- Form 498 School or Library Officials can start, complete, submit, certify, modify, and deactivate existing Forms 498.
- Form 498 General Financial Contacts can start, complete, and submit Forms 498, but cannot certify new or updated Forms 498 or deactivate existing Forms 498.
- Post-Commitment Full and Partial rights user can start, complete, and submit Spin Change and Service Substitution requests. Post-Commitment View Only rights can view the submitted Spin Change and Service Substitution requests.

Apply All	470 Permission	471 Permission	BEAR/472 Permission	498 Permission	Post-Commitment Permission	486 Permission	Appeals Permission
<input type="text"/>	<input type="text" value="View Only"/>	<input type="text" value="View Only"/>	<input type="text" value="View Only"/>	<input type="text" value="No Access"/>	<input type="text" value="View Only"/>	<input type="text" value="View Only"/>	<input type="text" value="View Only"/>

CANCEL

CONTINUE

Manage User Permissions

Organization Details

Name Library System 10036	FCC Registration Number 0123456780
Address 39 Maryland Ave Rockville, MD 20850 Montgomery	Organization Type Applicant
Mailing Address 39 Maryland Ave Rockville, MD 20850 Montgomery	Phone Number 012-345-6789
	Email library_sys_10036@mailinator.com

User Permissions

In the table below, you can designate the permissions that you wish to give to each of your users for the various tasks you can complete in the portal. This table will continue to grow as more functionality comes online.

- Full rights users can start, complete, submit and certify forms.
- Partial rights users can start and enter data in the form, but cannot submit and certify them.
- View Only users can only see forms created by other people in your organization but cannot create forms themselves.
- Form 498 School or Library Officials can start, complete, submit, certify, modify, and deactivate Forms 498.
- Form 498 General Financial Contacts can start, complete, and submit Forms 498, but cannot certify new or updated Forms 498 or deactivate existing Forms 498.
- Post-Commitment Full and Partial rights user can start, complete, and submit Spin Change and Service Substitution requests. Post-Commitment View Only rights can view the submitted Spin Change and Service Substitution requests.

Name	Email	Apply All	470 Permission	471 Permission	BEAR/472 Permission	498 Permission	Post-Commitment Permission	486 Permission	Appeals Permission
FirstName LastName	ls_user_10036@mailinator.com	<input type="button" value="Apply All"/>	Full	Full	Full	School or Library Official	Full	Full	Full
Non-Admin Istrator	asjunk@hotmail.com	<input type="button" value="Apply All"/>	Full	Full	Full	School or Library Official	Full	Full	Full

CANCEL

SUBMIT



EPC Invoice



My Applicant Landing Page



Training

Universal Service Administrative Co.

Welcome, [Library System 10036!](#)

Pending Inquiries

Type

Application/Request

Funding Year

Pending COMAD Inquiries are not included.

Application/Request Number	Type	Nickname	Inquiry Name	Outreach Type	Date Sent	Due Date	↑	Extn.	Status



Good Afternoon, Welcome to E-Rate!
Independent School 1 Admin 703

**My
Organization**

**My Forms and
Requests**

**My Pending
Tasks**

**My Pending
Inquiries**

🔍 *Search SL Applicant Entities*

SEARCH



BEN	BEN Name	City	State	Entity Type	
24738	Independent School 703	Queens	VA	School	File FCC Form 472/BEAR

FCC Form 472

OMB Number 3060-0856 Form 472

Basic Information

Invoice Line Item Summary

Preview

Certify Form 472

Independent School 703 (BEN: 24738)

Billed Entity Information

Independent School 703

1112 East Ave

Queens, VA 14634

Billed Entity Number: 24738

FCC Registration Number: 2234567890

Applicant Type: School

Applicant FCC Form 498 ID: *

111-111-1112

Invoice Nickname

Please enter an invoice nickname here: *

Contact Information

Are you the main contact person?

DISCARD FORM

SAVE & CONTINUE

FCC Form 472

OMB Number 3060-0856 Form 472

Basic Information

Invoice Line Item Summary

Preview

Certify Form 472

Independent School 703 (BEN: 24738) - State Training 2024 - #BEAR202400016

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](#) [X REMOVE LINE ITEM](#)

[BACK](#) [DISCARD FORM](#)

[SAVE & CONTINUE](#)

FCC Form 472

OMB Number 3060-0856 Form 472

Basic Information

Invoice Line Item Summary

Preview

Certify Form 472

Independent School 703 (BEN: 24738) - State Training 2024 - #BEAR202400016

Invoice Line Item

Select Funding Year

2022

Funding Request Number (FRN)

SEARCH

CLEAR FRN FILTER

Select FRN ?

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

FCC Form 471 Application Number	Funding Request Number (FRN)	Funding Request Nickname	Funding Request Amount	Service Provider Identification Number (SPIN)	Service Provider Name	Discount Rate
221000339	2299000421	FRN13_DT_P1_and_P2_Tariff	\$1,324.80	14010001	USAC Service Provider Organization 1	90%
221000339	2299000419	FRN12_DT_P1_and_P2_Tariff	\$1,324.80	14010001	USAC Service Provider Organization 1	90%
		FRN11 DT P1 and P2			USAC Service	



221000339	2299000410	FRN9_DT_P1_and_P2_Tariff	\$1,324.80	14010001	USAC Service Provider Organization 1	90%
-----------	------------	--------------------------	------------	----------	--------------------------------------	-----

1 - 5 of 25

Add New Invoice Line

Form 471 Application Number 221000339	Funding Request Number 2299000421
---	---

<p>Billing Frequency *</p> <div style="border: 1px solid red; padding: 2px;">Please select a value</div> <p>Use this field for recurring services. The date entered should be the date of the first vendor invoice related to the services included on this line item.</p> <p>Customer Billed Date ?</p> <div style="border: 1px solid red; padding: 2px;">mm/dd/yyyy</div> <p>Shipping Date to Customer or Last Day of Work Performed ?</p> <div style="border: 1px solid red; padding: 2px;">mm/dd/yyyy</div>	<p>Total Undiscounted Amount for Service *</p> <div style="border: 1px solid red; padding: 2px;">Please enter the amount billed to USAC</div> <p>Discount Amount Billed to USAC</p> <p>(Total Undiscounted Amount For Service * Discount Rate)</p>
--	--

Supporting Documentation

UPLOAD Drop files here



Optional but highly recommended!

CANCEL SAVE

FCC Form 472

OMB Number 3060-0856 Form 472

Basic Information

Invoice Line Item Summary

Preview

Certify Form 472

Independent School 703 (BEN: 24738) - State Training 2024 - #BEAR202400016

▲ 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.

- 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.
- 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.
- 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).
- 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.
- 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

FCC Form 472

OMB Number 3060-0856 Form 472

Basic Information

Invoice Line Item Summary

Preview

Certify Form 472

Independent School 703 (BEN: 24738) - State Training 2024 - #BEAR202400016 Certification Confirmation

You have successfully filed FCC Form 472 #BEAR202400016

[FCC Form 472 Record - BEAR202400016](#) 

Certifier Information

Name Independent School 1 Admin 703

Title Tester

Certified Date 4/22/2024 2:01 PM EDT

Address 1112 East Ave

Queens, VA 14634

Telephone 111-111-1111 ext. 14

CLOSE



Invoicing: SPI Forms

- SPIs are filed by the service provider
 - Must be filed after service provider has invoiced applicant for discounted amount
 - Applicants never see SPIs – cannot verify accuracy of invoices
 - ... but may be responsible in an audit for SP errors

Invoicing Deadlines



- Invoice deadlines
 - Generally 120 days after last date to receive service
 - For FY2023 Category 1 deadline is: **10/28/2024**
 - For FY2023 Category 2: usually latest is **1/28/2025** (but depends on contract – could be earlier!)
 - No more pandemic automatic extensions
 - Invoice deadline can be extended...
 - ... but extension **must** be requested before deadline



Invoice Deadline Extension Request (IDER)

- FY2015 and prior can be filed in BEAR portal
- FY2016 onwards requires EPC account with appropriate rights
 - In EPC, log in and click on your entity name...

Organization Details

Name [Redacted]
Entity Number [Redacted]
FCC Registration Number [Redacted]

Applicant Type Library System
Status Active



Contact Information

Physical Address [Redacted]
Mailing Address [Redacted]

Phone Number [Redacted]
Email [Redacted]
Website URL [Redacted]

Account Administrator

Name [Redacted]

General Contact

Name [Redacted]














Applicant Attributes

Library System Sub-Type Public Library System
 Private Library System

Main Library Branch



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

-  **Manage Organization**
This function allows you to update information about an entity or BEN.
-  **Create a Customer Service Case**
This function allows you to submit a question about an E-rate form or topic. You can also submit a specific request or an attachment.
-  **Manage Organization Relationships**
Process to relate an Organization to another Organization
-  **Create FCC Form 470**
This function allows you to create an FCC Form 470 for your entity.
-  **Create FCC Form 471**
This function allows you to create an FCC Form 471 for your entity.
-  **Create FCC Form 486**
This function allows you to create an FCC Form 486 for your entity.
-  **Manage Contracts**
Create, edit, and remove contracts for your organization
-  **Create Appeal**
This function allows you to submit an appeal
-  **Create SPIN Change Request**
Action to initiate a SPIN change request.
-  **Create Service Substitution Request**
Action to initiate a Service Substitution request.
-  **Create FCC Form 500**
This function allows you to create an FCC Form 500 for your entity.
-  **Hurricane Impact Designation**
This action allows Billed Entities to select directly impacted entities located in Directly Impacted Areas pursuant to FCC 17-139.
-  **Invoice Deadline Date Extension Request**
Request an extension to the invoice deadline for one or more funding requests.





 SAVE DRAFT

Request an extension: Invoice Deadline Date

Funding Request Number(s) for extension

List one or more funding request numbers (FRN) below to check its eligibility for an extension to the Invoice Deadline Date.

600/600 characters remaining

Note: Each FRN must be separated by a comma.

CANCEL



CHECK ELIGIBILITY

 SAVE DRAFT

Request an extension: Invoice Deadline Date

Funding Request Numbers Eligible for Extension

The funding request numbers listed below are eligible for an Invoice Deadline Date extension. The request must still be submitted and approved by USAC before an extension can be granted. To edit your list of FRNs, use the Back button at the bottom of this screen.

<input type="checkbox"/>	Funding Request Number	FRN Nickname	Current Service Delivery Deadline	Current Invoice Deadline Date	BEN	SPIN
<input type="checkbox"/>			6/30/2020	10/28/2020		
<input type="checkbox"/>			6/30/2020	10/28/2020		
<input type="checkbox"/>			9/30/2020	1/28/2021		

REMOVE

Funding Request Numbers Ineligible for Extension

The funding request number(s) listed below are not eligible for an Invoice Deadline Date extension. For more information, please review the Reason for Ineligibility.

Funding Request Number	FRN Nickname	Reason for Ineligibility	Service Delivery Deadline	Invoice Deadline Date	BEN	SPIN
No items available						

Note: Only eligible FRNs will be submitted for an extension. To edit your list of FRNs, use the Back button below.

CANCEL BACK



SUBMIT



Common Issues and Remedies



Common Issues and Remedies

- Many issues don't have remedies
- Issues here drawn from USAC's commonly cited list and issues that have affected library applicants across the country
- If you have general or programmatic questions, contact us or the electronic mailing list (e-rate@mbic.state.ma.us)
- For other specific questions, are having an issue, use the resources available to you – USAC, consultant, etc. – to find out more about the issue and possible solutions
- USAC is *often* wrong



Common Issues: Procurement

- Failure to list the proper Form 470
 - Remedy: change the Form 470 to the correct one
- Failure to do appropriate competitive bidding
 - Remedy: provide documentation showing proper procurement was done, or restart procurement/competitive bidding process (*if there is time*)
- Remember, procurement issues are the hardest ones to fix



Common Issues: Application Review

- Unable to reach/no response from applicant during PIA review
 - Remedy: ensure that contact info on application is valid, list applicant on forms as contact, and include alternative contact info
- Category 2 Budget Exceeded
 - Remedy: work with reviewer to remove Category 2 items until the total pre-discount amount of the funding request is below the C2 budget. Make sure your vendor is also aware if doing SPI invoices!
- Funding Commitment reduced due to ineligible services
 - Remedy: ensure that all ineligible services are cost allocated out of the funding requests prior to filing Form 471. Appeal if USAC data is incorrect
- Funding commitment reduced due to missing documentation
 - Remedy: supply the requested documentation



Common Issues: Application Review

- Services delivered outside funding year
 - Remedy: ensure services are delivered during eligible funding year period. If necessary, appeal to USAC
- Ineligible entities removed
 - Remedy: ensure that ineligible entities are cost allocated from the application. If entities are actually eligible, appeal to USAC
- No invoice filed or invoice filed late
 - Remedy: ensure invoice is filed prior to deadline, deadline extension is requested, and/or appeal to USAC
- Missing information in profile
 - Remedy: update profile information (address, sq. footage, locale code)



Final Thoughts

- Watch the e-rate@mbhc.state.ma.us list and Newsbrief for updates and clarifications
- Sketch out your timelines and make any necessary changes vis-à-vis invoicing
- Don't be afraid to ask questions!
 - Ask us on e-rate@mbhc.state.ma.us – we love your questions!
 - CSB: 888-203-8100 or in EPC (under Actions “select”, “Contact Us” to get answers from USAC)
- Make sure you stay in control of and monitor your applications
- Take advantage of E-rate if it can help you!

Questions?

