

**Instructions for Completing Form 472 for Basic Telephone Services
Application Date July 2013**

The Form 472 is the Schools and Libraries Universal Service Billed Entity Applicant Reimbursement (BEAR) Form. The BEAR Form will allow libraries to receive REIMBURSEMENT for services already paid. In each Funding Year, you file four different forms with the BEAR form being the last. Until the BEAR Form, all of the figures that you have submitted to the SLD have been estimates based on previous months

~For each BEAR form you MUST use actual dollar amounts.~

When to File

WVLC suggests libraries file twice a year; in January for services received and paid from July 1 – December 31, and in July/August for services received and paid from January 1 – June 30.

How to File

WVLC suggests libraries file online at <http://www.sl.universalservice.org/menu.asp>.

Note: Effective July 22, 2013, FCC Form 472 has been updated! Until USAC can get their website updated, you **CANNOT** file online. You will need to submit this form via email, fax or mail. If you have any questions, please contact Rebecca Rice at rebecca.j.rice@wv.gov or (304) 558-2041, Ext. 2080.

Reminder: Most of the E-rate forms submitted by libraries or library systems apply to basic (Plain Old Telephone Service – POTS) and long distance service. The West Virginia Library Commission will continue to submit the E-rate forms associated with Internet access (56k/T1 frame relay lines).

PLEASE NOTE, FCC FORM 472 HAS BEEN UPDATED! PLEASE USE THE APPLICATION DATED JULY 2013, FROM USAC'S WEB PAGE.

Applicant Form Identifier: Create an identifier for your own reference (i.e. 2012-VER-2 equals Funding Year 2012 - Verizon service provider - 2nd reimbursement (Jan. 1, 2013 – June 30, 2013).

Block 1 – Header Information

Item 1: Enter the 471 Billed Entity Application Name – name of the library as it appears on the previous SLD documentation.

Item 2: Enter the 471 Billed Entity Application Number – the number assigned to the library by the SLD.

Item 3: Enter the Service Provider Identification Number (SPIN) – the unique number assigned to each vendor by SLD.

Item 4: Enter the Contact Name of the person who can answer any questions about the form.

Item 5: Enter the library telephone number where the person listed in Item 4 can be reached.

Item 6: Enter the Total Reimbursement Amount – This is the total from Block 2, Column 14.

Block 2 – Line Item Information per FRN

If filing on paper, please notice that Block 2 is made up of columns and rows. Each BEAR Form will have at least one ROW of information. If you have 3 libraries in one library system that use the same vendor but receive separate bills, then your BEAR will have 3 rows of information. The information that is needed for each column is unique to each FRN. You can think of a “row” as a single account of information.

~~If you are filing online you will have one “line” for each FRN.~~

Item 7: Enter the Form 471 Application Number – You can find this in the header information of the FCDL that contains the funding commitment decision for the specific FRN.

Item 8: Enter the Funding Request Number (FRN) – You can find this on the Funding Commitment Report of the FCDL.

Item 9 - 11: Leave these items blank.

Item 12: Total (Undiscounted) Amount for Service: Enter the total amount paid for the Service. Add up the phone bills for eligible service for the period that you are requesting reimbursement. Be sure not to include any dollar amounts for service prior to July 1 or after June 30. Most phone bills do not run from the 1st through the 31st. If your July bill covers service from June 20th through July 19th, be sure to pro-rate the bill for only the July portion of the bill. A funding year only covers service effective July 1st through June 30th. Again, ACTUALLY ADD UP the phone bills that you paid for the time period for which you are requesting reimbursement. If your phone bill includes any ineligible services (such as equipment), be sure to deduct that amount from each bill. Remember: A reimbursement is based on actual expenditures. Take Column 12 and multiply by Column 13. Input the dollar amount to be reimbursed by the service provider. In Item 12, you will put the total payment for eligible services for the time period for which you are requesting reimbursement. You will need to do this PER VENDOR.

Item 13: Input the Discount Rate from your FRDL (Funding Request Decision Letter).

Item 14: Amount Billed to USAC (Column 12 multiplied by Column 13): For this item, you are calculating the specific discount that applies to this FRN. Multiply Item 12 by Item 13 and put result in Item 14. (For example, if the library's discount is 82% and the total ACTUAL expenditures for eligible services in column 14 were \$425.46, then you multiply 425.46 times 0.82 to get \$348.87. Therefore, for this example, you would put \$348.87 in Row 1, Item 14.)

TOTAL REIMBURSEMENT AMT TO BE ENTERED INTO ITEM (6): This is the total of Item 14. This is the dollar amount that you will enter on **BLOCK 1, Item 6** (Total Reimbursement Amount).

Block 3 – Billed Entity Certification

Certify that everything is correct on the form. If filing on paper this page must have an **ORIGINAL** signature in **BLUE INK**.

Effective July 22, 2013, this form CANNOT be filed online. USACs website is being revamped to accept the NEW July 2013 BEAR form. Until further notice, you will need to file this form via email, fax or mail.

The authorized person is the library director, a board member, or in some cases, the Regional/Service Center is authorized to sign on behalf of affiliates. This is handled differently in the various Service Centers.

Block 4 – Service Provider Acknowledgement

If you file on paper, you must submit a copy of your BEAR to the Service Provider requesting that they please review and return a signed Block 4 to you. They may return Block 4 to you via fax, mail or in person. An original ink signature is **NOT** required on Block 4.

~~If you file online, the service provider will be notified and can complete the acknowledgement online as well. You will **NOT** need to submit anything to the service provider.~~

Note: Until USAC updates their website, you will need to contact your service provider to have Block 4 reviewed, signed and returned to you via fax or mail. Then you may submit the BEAR form to USAC via email, fax or mail.

For more detailed instructions or if you are filing for more than basic telephone and long distance service, download the FCC Form Instructions at <http://usac.org/res/documents/sl/pdf/470i.pdf>.

For assistance with completing the Form 472 or any of the FCC E-rate Forms contact:

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To receive updates and reminders regarding the E-rate Program join the WVLC E-rate Listserv at <http://listserv.wvlc.lib.wv.us/mailman/listinfo/erate>.

~ http://librarycomission.lib.wv.us/html/erate/index_erate.htm ~