



Technology Point of Contact Listserv

E-rate - Have you gotten your E-rate money?

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Forwarded from Learning Technology Center 6...

Well, E-rate fiscal year 2015 (School year 2015-16) has ended. This may have you thinking, "Ok, now where is my money!?" As you may have heard, the reimbursement process is a little different this year. Instead of the money going from USAC to the provider, then to you, the money will come directly to you. In order to insure your money flows appropriately, you will need to complete a Form 498 on the USAC EPiC portal. The following process will set your district up to receive reimbursement funds from USAC.

Before we start, please remember to check with your finance people at the district and insure that even if you received discounts on your bills (the provider filed a SPI form with USAC and has received the money directly and given you a discount/credit on your bill) that you have indeed gotten all the funds applied for. Also, please do your homework and know EXACTLY what you paid to each provider. When we file the 471 forms in the spring we estimate the costs each month, those costs may change, and if they went down, you will only get the USAC portion of your bill, not more than that.

TO FILE A 498 (Banking information) FORM:

The District Administrator in the EPiC system will need to add a user, or indicate a current user as the 'general finance' individual in the system.

- Log into EPiC as district administrator (<http://portal.usac.org>)
- Choose manage users from the upper right (If you don't see this option, you are not the district administrator, only a user in the system and will need to contact the district admin, who is probably the superintendent of the district.)
- Check the box in front of your district name Choose Create New User or Manage User Permissions
- If you are adding a new user, complete the information page.
- In the chart of permissions, find the 498 column and use the pull down menu to choose School or Library Official or General Financial Contact.
- If you are adding a new user - they will get an email from the system and will have to go in and create a password before they can access the system.

To Find the 498 Form in the EPiC Portal:

- Log into EpiC as a user with 498 rights (School Official/General Financial Contact access check above)
- From the Landing Page (If you aren't sure if you are there click the USAC logo on the left and you will be.) Choose the district name from the Entity list.
- On the left choices click related actions
- Scroll down to find Create FCC Form 498 and click the link
- There are 5-7 screens of information to be completed including

- Official district banking name
- Indicating your financial contact (MUST be in system see above)
- Federal Employer Identification Number (Fed. tax id)
- Duns & Bradstreet Number (Fed. funds recipient)
- Bank Routing and Account number (Hint: the first one on the check/deposit slip is the ACH Financial Institution Transit Number, the second one is the Financial Institution Account number for ACH)
- You must click save and continue on each page and submit at the end
- Your 498 form will be displayed on the landing page under tasks and will appear as Submitted, then Accepted when USAC approves it.

The next step to getting your funds is filing a BEAR (472) Form. Please look for another email from me today describing that process. (Spoiler alert - if you have done one before the process is the same.... it's the OLD way, except no sending to provider to certify with you!)

As always, let me know if you have any questions or need any assistance. I would be happy to talk you through it on the phone, in a google hangout or via email.

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