Filing your 472 BEAR form

June 30th marked the closing of the funding year. You have 120 days from 6/30 to file your 472 (deadline: 10/28/16) requesting a reimbursement on your phone bills (and internet if you applied for it). If you did not receive a discount on your bills, file a 472 for each provider.

You need to pull your Yellow Funding Commitment letter for 2015 (July 1, 2015-June 30, 2016). Refer to the Funding Commitment Report page(s) for Application number and Funding Request Numbers (FRN)s and Start dates. (make sure you have the correct Commitment letter, last year a large number of you used the wrong letter)

Preparation:

- You must have filed a form 498 before you can begin (instructions were in my email of 9/15), and you must have your “old” pin number from previous year’s filings. New Library Managers will be getting one in the mail in a two part mailer if I talked to you on the phone. While you wait, you may continue with the preparation.
- Gather your phone bills from July 2015 through June 2016.
- Write down the total for each bill for the month, then subtract out any ineligible charges, (late fees, administrative costs, additional directory listings). Refer to the sample bill I sent back to you in January 2015, outlining your library’s ineligible charges. If you prefer, use the Phone Total Spreadsheet I emailed you.
- If you have a Verizon bill, you will need to separate out any Verizon Long Distance charges and apply for reimbursement separately for those.
- If you have internet, that must be broken apart also.
- Once you have your phone/internet totals calculated for each service provider, your pin number and have had your form 498 approved, you are ready to apply.

Note: the screen shots in this documentation may not reflect the current funding year. Please look at your Funding commitment letter for current Funding Year, Application Numbers, Funding Request numbers, SPIN numbers and Start Dates, etc.

Go to www.usac.org/sl
Click “Apply for E-rate”
Scroll down and click “Start your form 472”
Login using your old signature pin number. (If you are a new Library Manager, I have requested one to be issued for you.

FYI Note: to search for a previous year’s BEAR Form as a guide for this year, see instructions at the end of these instructions.

- The home page will be empty like this if there are no BEAR forms in the process of being certified.
- To begin a BEAR form click NEW BEAR FORM
- A separate BEAR form must be created for each spin number (Service Provider), but EVM BLR may group all Verizon charges on one BEAR and all Verizon Long distance charges on another. If you have internet included in your bill, that must be applied for separately also.
- Create the form Identifier. Those of you with only 1 Service Provider, 2015 472 1 is fine. Those with multiple providers need to define each form differently. Examples: 2015 VER 1 (VER=Verizon, VLD = Verizon Long distance, INT= internet etc.).
- Enter the spin number of your first service provider in #3. (Found on the commitment reports page). Make sure that the correct Service Provider Name appears next to the SPIN.
- Make sure the contact information in #4 is correct. Change the name if you are a new contact person.
- Tab to Block 2.

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<table>
<thead>
<tr>
<th>Block 1: Header Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Billed Entity Name</td>
</tr>
<tr>
<td>2. Billed Entity Number</td>
</tr>
<tr>
<td>3. Service Provider Name</td>
</tr>
<tr>
<td>4. Contact Name</td>
</tr>
<tr>
<td>5. Contact Telephone Number</td>
</tr>
<tr>
<td>Contact Fax</td>
</tr>
<tr>
<td>Contact Email</td>
</tr>
<tr>
<td>6. Total Reimbursement Amount (total from Block 2, Column 14)</td>
</tr>
</tbody>
</table>
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- From the 2015 funding commitment report page, type in the 471 Application number in 7.
- Tab to 8 and enter your funding request number (if you have multiple service providers, make sure you are looking at the correct report page).
- 10. Enter the service start date from your report page 07/01/2015. (Leave 11 empty)
- 12. Enter your revised total of your phone bills. (Your reimbursement will be the figure in 14 OR the “Funding commitment decision amount” on the report, whichever is less).

- EVM, BLR, will click “Add Line Item” for the second Verizon NY Bill. Enter both “Verizon NY” portions on this application. CAN has 2 for the branches. CLK can add the internet portion because it is with the same service provider).

- Check the boxes A thru E and read what you are checking.
- Put a checkmark in 15 even though my example doesn’t show one.
- Complete all the 19s. Be sure you put your library’s name in 19c. If you are a board member put the library in.
- Complete 27 (it seems redundant but there are “paid consultants” who would have different contact info).

When you have checked your figures **do one of the following:**

**Click certify and submit** if you are done with this BEAR form. Print the certified page for your records. Return to BEAR HOME to be sure there is no incomplete form listed. Then log out.

**OR** Click save If you want me to look at it or to complete it another time. Return to BEAR HOME.

If you clicked certify and submit, Your “BEAR Home” page should be blank. If you only clicked save, your application will show incomplete. You may click edit, to make changes or to “certify and submit”. Or you may email me to look at it.
For those of you who have a second Service Provider or need to apply for internet (OSC), Click NEW BEAR FORM and begin again using your second report page in your commitment letter.

When you have completed and certified all BEAR forms, send me an email so I can cross you off the list. You will receive an email saying BEAR xxxx successfully submitted. Be sure you get one from each form you submitted.

To check the status of your BEAR FORMS or display them from previous years

Click Apply for E-rate – Start your Form 472 - Log in to the BEAR Utility - Click on Track Form
Click search. You will get a hit list of all applications submitted. You can sort by date created. The status will say “pending certification” when first submitted, then “In review”, then “Complete”. Click on the invoice ID number to view the application.

As the October deadline approaches, you should make sure your applications say Complete. If not, call USAC to see if there is a problem.