

ACTION ITEM – COMPLETE ERATE FCC FORM 498 TO RECEIVE ERATE PAYMENTS JULY 1, 2016

Starting July 1, 2016, USAC will issue E-rate reimbursement payments electronically directly to the applicant school or library. E-rate Applicants MUST complete an FCC Form 498, Service Provider and Billed Entity Identification Number and Contact Information Form, to provide USAC with their banking account information so that USAC can electronically deposit funds in their accounts.

This form must be submitted and processed before USAC can make direct payments.

STEP 1 – YOU WILL NEED TO CREATE A USER IN YOUR EPC PORTAL for the person who manages the finances at your school or library.

The General Financial Contact for your school district must be added as a user in EPC

To create the user, login to your EPC portal,

<http://www.usac.org/sl/tools/e-rate-productivity-center/default.aspx>

Once logged in, Click on reports (top menu), then my landing page

Choose your district name – first name listed

At the top right of the screen, select “create a new user”

Fill in the information on the screen to enter the new user and submit

Once the user has been created, they will need to respond to the auto-generated emails and login to the EPC portal plus change their password.

They will receive a 3rd email from USAC that will ask the user to “AGREE” to everything. Once they have agreed, then their name will show up in your portal.

The new user will need to notify you that this step has completed BEFORE you can complete the 498.

For information on adding users, see:

<http://www.usac.org/sl/about/outreach/videos/EPC-Creating-a-New-User.aspx>

STEP 2- MANAGE THE USER RIGHTS FOR YOUR GENERAL FINANCIAL CONTACT.

After your general financial contact has successfully accessed the portal AND agreed to the terms, your next step is to assign them rights.

To assign rights to the user, login to your EPC portal, click on reports, my landing page
Choose your district name – first name listed

At the top right of the screen, select “manage users”

Review the rights assigned to your users and then submit your changes

-> Assign the general financial contact full rights AND access to the FCC Form 498.

-> ALSO make sure that YOU have rights to the FCC Form 498.

(note - the system will not allow you to assign Form 498 rights to consultants)

<http://www.usac.org/sl/about/outreach/videos/EPC-Managing-User-Permissions.aspx>

STEP 3- GATHER THE DATA YOU WILL NEED:

- 1. Your Federal ID #**
- 2. Your DUNS number**

First, check to see if you already have a DUNS number. You can check by searching the [online D-U-N-S database](#) website or by calling (866) 705-5711.

The EASIEST way is to call 866-705-5711. You'll need to provide the caller with your home address (not work address) so they can verify you are a real person. If you have moved within 2 years, you may need to also provide your previous home address. Once they validate that you are who you say you are, you can receive the number. (any school or library employee can request the number - Dun & Bradstreet simply needs to confirm you are who you say you are).

If you do not already have a DUNS number, you can apply for one through the [Dun & Bradstreet website](#). (Dun and Bradstreet will issue a DUNS number without charge to an entity required to register with the federal government for contracts or grants)

STEP 4- COMPLETE THE FORM 498:

To access Form 498:

1. Login to your EPC portal.
2. Click on Reports from the top menu
3. Click on My Landing Page
4. Click on the name of your school district or library system (usually the first entity listed under "my entities")
5. On the left hand menu, under Summary, click on "Related Actions"
6. Click on "Create FCC Form 498"
 - a. If you do not see the FCC Form 498 on the menu, then you need to go back to step 2 and assign yourself rights to access the FCC Form 498.

Complete the form:

1st screen – enter a nickname for your application. This can be any short name you choose to identify the application.

Note: Leaving Holding Company & Federal ID of Holding Company blank

Create a FCC Form 498

In the E-rate Program, the FCC Form 498 is used by applicants who select the direct (BEAR) invoicing process. This form establishes your bank account with USAC by collecting banking and remittance information for the organization. All BENs associated with this organization and banking/remittance information should be included on this form. Submission requires School or Library Official certification.

POCOLA INDEP SCHOOL DISTRICT 7 - Pocola 498 04-04-2016 - 443000486

Basic Information	General Financial Contact	Organization Numbers	Remittance Information	Associated BENs	Principal Communication Types	School or Library Official Certification
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Application Nickname

Please enter an application nickname here*

Organization Information

Name POCOLA INDEP SCHOOL DISTRICT 7	Mailing Address 603 E PRYOR AVE, PO BOX 640 POCOLA, LE FLORE, OK 74902
Name Company is Doing Business As (DBA) or Formerly Known As (FKA) <input type="text" value="Pocola Public Schools"/>	Federal EIN, or TAX ID Number of Holding Company <input type="text"/>
Holding Company Name <input type="text"/>	

Once 'Save and Continue' is clicked, you will be able to leave the form without losing any entered information from this page. To return to the in-progress form, locate it under the 'Tasks' tab.

On the next screen, start typing the name of the person who is the general financial contact. They must ALREADY be entered as a user in your EPC portal. If you have not yet set this person up as a user in your portal, you'll need to first add them as a user.

ALSO don't forget that once you add a user, they are not active until they login and accept the user terms & conditions.

For information on adding users, see:

<http://www.usac.org/sl/about/outreach/videos/EPC-Creating-a-New-User.aspx>

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POCOLA INDEP SCHOOL DISTRICT 7 - Pocola 498 04-04-2016 - 443000486

Basic Information

General Financial Contact

Organization Numbers

Remittance Information

Associated BENs

General Financial Contact of POCOLA INDEP SCHOOL DISTRICT 7

Enter General Financial Contact*

Name of general contact – MUST already be a user in your EPC portal

**NEXT STEP IS TO ENTER YOUR FEDERAL ID NUMBER AND YOUR DUNS NUMBER
THE FCC REGISTRATION NUMBER WILL BE AUTOMATICALLY POPULATED FOR YOU.**

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POCOLA INDEP SCHOOL DISTRICT 7 - Pocola 498 04-04-2016 - 443000486

Basic Information

General Financial Contact

Organization Numbers

Remittance Information

Associated BENs

Principal Communication Types

School or Library Official Certification

Further Details

Federal Employer Identification Number*

Dun and Bradstreet Number (DUNS)*

FCC Registration Number

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Delete Form

Previous

Save and Continue

ADVANCE TO THE NEXT SCREEN:

- A. CLICK ON YES TO MAKE THE REMITTANCE CONTACT THE SAME AS THE GENERAL FINANCIAL CONTACT
- B. =OR= ENTER INFORMATION FOR A DIFFERENT PERSON WHO WILL SERVE AS THE REMITTANCE CONTACT.

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POCOLA INDEP SCHOOL DISTRICT 7 - Pocola 498 04-04-2016 - 443000486

Basic Information
General Financial Contact
Organization Numbers
Remittance Information
Associated BENs
Principal Communication Types
School or Library Official Certification

Remittance Contact

Is the Remittance Contact the same as the General Financial Contact?

Yes

Contact Information

First Name*	Phone Number*
Last Name*	Phone Number Extension
Middle Initial	Email Address*
Title*	

Financial Information

Remittance Financial Institution*	Financial Institution Account Number for ACH*
ACH Financial Institution Transit Number*	

Once 'Save and Continue' is clicked, you will be able to leave the form without losing any entered information from this page. To return to the in-progress form, locate it under the 'Tasks' tab.

Delete Form
Previous
Save and Continue

THE NEXT 2 SCREENS ARE INFORMATIONAL ONLY – USUALLY NO CHANGES ARE NECESSARY

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POCOLA INDEP SCHOOL DISTRICT 7 - Pocola 498 04-04-2016 - 443000486

Basic Information General Financial Contact Organization Numbers Remittance Information **Associated BENs** Principal Communication Types School or Library Official Certification

Block 14: Billed Entity Number/FCC Form 498 Association

If you are an entity that has chosen to receive your E-rate Program payments directly (BEAR invoicing), please enter the Billed Entity Numbers that are to be associated with this FCC Form 498.

Billed Entity Number	Billed Entity Name	
140391	POCOLA INDEP SCHOOL DISTRICT 7	

Add Additional BEN Number

[Add to List](#)

Once 'Save and Continue' is clicked, you will be able to leave the form without losing any entered information from this page. To return to the in-progress form, locate it under the 'Tasks' tab.

Delete Form

Previous

Save and Continue

Create a FCC Form 498

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POCOLA INDEP SCHOOL DISTRICT 7 - Pocola 498 04-04-2016 - 443000486

Basic Information General Financial Contact Organization Numbers Remittance Information Associated BENs **Principal Communication Types** School or Library Official Certification

Service Identification

Principal Communication Type School/Library or other Billed Entity Recipient

Delete Form

Previous

Continue to Certification

LAST SCREEN IS THE CERTIFICATION PAGE.

CLICK ON THE HOT LINK TO REVIEW YOUR DRAFT FORM 498. MAKE SURE THE INFORMATION IS CORRECT.

THEN PROCEED BY CLICKING “I HAVE REVIEWED...”

AND CLICK “I CERTIFY”

FINISH BY CLICKING “CERTIFY” IN THE LOWER RIGHT HAND CORNER

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Review Data

Please carefully review the data entered on the form for accuracy.
[FCC Form 498 #443000486](#)

I have reviewed this form and have determined the information to be accurate.
I certify that I am a School or Library Official of the above-named entity, and that I am authorized to submit this FCC Form 498 data on behalf of the above named entity.
Persons willfully making false statements on this form can be punished by fine or forfeiture, under the Communications Act, as amended, 47U.S.C. Secs. 220(e), 502, 503(b), or fine or imprisonment under Title 18 of the United States Code, 18 U.S.C. Sec. 1001.

I certify.
Select the checkbox to certify your FCC Form 498 Pocola 498 04-04-2016

A download link will appear under Tasks when the PDF version of the certified form is ready to be downloaded

WHEN YOU HAVE COMPLETED THE ABOVE STEPS, PLEASE SEND YOUR ACCOUNT MANAGER A COPY OF YOUR PRINTED FORM 498 FOR OUR RECORDS.

VERY IMPORTANT: IF YOU HAVE ANY CHANGES TO THE INFORMATION IN YOUR FORM 498 IN THE FUTURE, YOU WILL NEED TO RESUBMIT AND UPDATED 498.

For further details see:

<https://usac.org/sl/applicants/step06/obtain-an-applicant-498-id.aspx>