

### Instructions for Completing Form 472 for Basic Telephone Services

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 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>.

**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).**

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#### Block 1 – Header Information

- Item 1:** Enter the 471 Billed Entity Applicant Name—name of the library as it appears on previous SLD documentation
- Item 2:** Enter the 471 Billed Entity Applicant 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:** Assign the form a number or name that suits the library's record-keeping needs.
- Item 7:** Enter the Reimbursement Form Date to SLD: fill in the date that you are submitting the form to the SLD
- Item 8:** Enter the Total Reimbursement Amount—you will not know the reimbursement amount until you calculate the information in Block 2. If you file, online this item will automatically be entered after you complete Block 2.

#### 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 9:** 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 10:** Enter the Funding Request Number (FRN)—You can find this on the Funding Commitment Report of the FCDL
- Item 11:** Leave this item blank
- Item 12:** Enter the Customer Billed Date—Enter July 1 of the current funding year. For FY2010, enter July 1, 2010
- Item 13:** Leave this item blank

**Item 14:** Total (undiscounted) Amount for Service: actually 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. So, 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 1 through June 30. Again, ACTUALLY ADD UP the phone bills that you paid for the time period for which you are requesting reimbursement. Remember: A reimbursement is based on actual expenditures.

If your phone bill includes any ineligible services (such as equipment), be sure to deduct that amount from each bill. In Item 14, 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 15:** Discount Amount Billed to SLD: for this item, you are calculating the specific discount that applies to this FRN. 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 will multiply 425.46 times 0.82 to get \$348.87. Therefore, for this example, you would put \$348.87 in Row 1, Item 15.

**TOTAL REIMBURSEMENT AMT TO BE ENTERED INTO ITEM (8):** This is the total of Item 15. This is the dollar amount that you will enter on **BLOCK 1 Item 8** (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**.

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 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.

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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](http://usac.org/_res/documents/sl/pdf/470i.pdf).

For assistance with completing the Form 470 or any of the FCC E-rate Forms contact:

Jennifer Johnson, State E-rate Coordinator  
West Virginia Library Commission  
1900 Kanawha Blvd. E.; Culture Center  
Charleston, WV 25305  
Phone: 304-558-2041 ext. 2080  
In-state Toll Free: 800-642-9021 opt. 1  
Fax: 304-558-2044  
[Jennifer.L.Johnson2@wv.gov](mailto:Jennifer.L.Johnson2@wv.gov)

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>.