

**OKLAHOMA UNIVERSAL SERVICE FUND
OKLAHOMA LIFELINE FUND**

**REQUEST FOR FUNDING
INSTRUCTION PACKAGE**

Updated: July 1, 2019

**OKLAHOMA CORPORATION COMMISSION
Public Utility Division
Jim Thorpe Building, Suite 580
Oklahoma City, OK 73105
(405) 521-4114**

TABLE OF CONTENTS

TABLE OF CONTENTS	2
<u>SECTION ONE: Things to Know Before You File</u>	3
<input type="checkbox"/> If you have questions:	3
<input type="checkbox"/> Locating OUSF Information on the Web:.....	3
<input type="checkbox"/> Locating Forms for Requesting Funding from the OUSF and OLF:	3
<input type="checkbox"/> Documents Required to File a Request for OUSF Funding:	3
<input type="checkbox"/> Important Information to Know:.....	4
<u>SECTION TWO: Submitting Your Request for OUSF Preapproval</u>	5
<u>SECTION THREE: Filing Your Request for OUSF/OLF Funding</u>	7
<u>SECTION FOUR: Administrator's Funding Determination</u>	8
<u>SECTION FIVE: PUSF/SUSF Forms</u>	9
<input type="checkbox"/> Primary Universal Service Request Form (Form PUSF-1):	9
<input type="checkbox"/> Special Universal Service Request Form (Form SUSF):	10
<input type="checkbox"/> Oklahoma Lifeline Fund Request Form (Form OLF - 1):.....	11
<input type="checkbox"/> SUSF School Tab Instruction:.....	13
<input type="checkbox"/> SUSF Library Tab Instruction:	15
<input type="checkbox"/> SUSF Telemedicine Tab Instruction:	17
<input type="checkbox"/> Definitions:	19

SECTION ONE: Things to Know Before You File

- **If you have questions:**

If you have questions regarding the Oklahoma Universal Service Fund (“OUSF”) and Oklahoma Lifeline Fund (“OLF”) funding request process, please contact:

Oklahoma Universal Service Fund Administrator
Oklahoma Corporation Commission
Public Utility Division
P.O. Box 52000
Oklahoma City, OK 73152-2000
Tel: (405) 521-4114
OUSF@occeemail.com

- **Locating OUSF Information on the Web:**

- (1) Go to the Oklahoma Corporation Commission’s (“Commission”) website:
(<http://www.occeweb.com>)
- (2) Select “Divisions”
- (3) Select “OUSF”
- (4) Then choose from the menu the particular information you seek

Note: All OUSF Beneficiaries, contributing providers, eligible telecommunication service providers, and eligible providers refer are encouraged to obtain and review a complete set of the Commission Rules (Chapter 59) related to OUSF.
<http://www.occeweb.com/rules/rulestxt.htm>

- **Locating Forms for Requesting Funding from the OUSF and OLF:**

The appropriate forms necessary for making an OUSF or OLF funding request are available on the Commission’s website at the following location:
<http://www.occeweb.com/pu/OUSF/OUSF.htm>, or may be obtained from the OUSF Administrator (the “Administrator” or Public Utility Division “PUD”).
(Reference: OAC 165:59-3-61)

- **Documents Required to File a Request for OUSF Funding:**

Applicants should review each Form and read carefully the instruction sheets for each Form to ensure that the required Forms are complete and accompanied by the required supporting documentation. **Please keep in mind that any Request for OUSF Funding may be denied if the appropriate Forms are not used or said Forms are determined to be incomplete.**

The following items are to be filed with the Commission’s Court Clerk:

- (1) ***Request for OUSF Funding and Notice of Request for OUSF Funding*** (“Request”), with a corresponding ***Certificate of Mailing***. Templates may be found at:
<http://www.occeweb.com/pu/OUSF/OUSF.htm>.
- (2) **SUSF Form.** The Excel version of the SUSF Form must be sent to the Administrator via email on the same day the Request is filed, and the email must include the Excel version of the SUSF Spreadsheet. The SUSF Form may be found at:
<http://www.occeweb.com/pu/OUSF/OUSF.htm>.

- (3) **Affidavit.** Each Request for a school, library, or healthcare entity (telemedicine) must contain a completed Affidavit. Use the Affidavit designed for the specific type of entity (school, library, or healthcare entity) found at: <http://www.occeweb.com/pu/OUSF/OUSF.htm>.
- (4) **Preapproval Funding Letter.** If a Preapproval Funding Letter was previously issued by the Administrator, it must be included with the Request.

- **Important Information to Know:**

- Applicants are required to provide a sufficient and competent level of supporting work papers and documentation in order to fully explain the basis of the Request, and to show that the level of funding requested is accurate and properly calculated.
- Support documents should be in “Word” and/or “Excel” formats, i.e., DOCX version of affidavits and Excel version of SUSF forms and attachments, or in Adobe PDF format.
- **Limitations on Funding:** Pursuant to OAC 165:59-7-17(b), prior to signing a contract with a school, library or recipient of a telemedicine line, the provider shall provide to the Beneficiary written information regarding the limitations on funding from the OUSF.
- **Alternative Funding:**
 - Primary Universal Services: For requests regarding Primary Universal Services, the eligible local exchange telecommunications service provider (“Provider”) shall make every reasonable and timely effort to obtain funding from alternative funding sources designated to support Universal Service or an explanation for why alternative funding is not available.
 - Primary Universal Services: If a Provider receives funding from alternative funding sources for an investment, expense or service reimbursed by the OUSF, the company shall reduce the amount of any prospective funding request from the OUSF by an equivalent amount. Under no circumstances will double recovery be allowed.
 - Special Universal Services: For requests regarding Special Universal Services, the Beneficiary shall make every reasonable and timely effort to obtain funding from state and/or federal funds, such as the federal School and Libraries Program or the Rural Health Care Programs designed to support Special Universal Services. The OUSF will fund either the lowest cost reasonable qualifying bid, or a bid that is no more than 25% above the lowest cost reasonable qualifying bid, inclusive of all non-recurring eligible charges, for the eligible bandwidth range of the Beneficiary. If the selected bid is more than 25% above the lowest cost reasonable qualifying bid, the OUSF will fund the lowest cost reasonable qualifying bid plus the 25%.
- **18-Month Rule:** Unless good cause is shown, any request for OUSF funding should be made within eighteen (18) months from the date the requesting Provider can determine the impact of occurrence of the circumstance giving rise to the request; however, if an Beneficiary has obtained a Preapproval Funding Letter from the Administrator, the Provider shall make a request for funding within 60 days of the start of service. (Reference: OAC 165:59-3-68(m)).
- **Lifeline:** A Provider may not receive reimbursement from the OLF unless it demonstrates that its rates have been reduced by an amount equal to the amount of the Lifeline payments that were previously included in the rate structure of the Provider. A Provider shall be eligible for support from the OLF for any amount which is greater than the amount which has been previously included in the rate structure of the Provider.

SECTION TWO: Submitting Your Request for OUSF Preapproval

Preapproval is an optional process available to Beneficiaries who desire to have certainty regarding the amount that will be funded from the OUSF in support of Special Universal Services on behalf of the Beneficiary.

- The Beneficiary may submit a ***Request for OUSF Preapproval*** to the Administrator to determine eligible services and credit amounts for the upcoming funding year at any time by sending via electronic mail a digital copy of all required documentation, to the email address OUSF@occeemail.com. For documents that have a file size over 10 MB, please contact the Administrator to determine the best method for transferring the documentation.
- You do not need to file the *Request for OUSF Preapproval* with the Commission's Court Clerk; the Administrator will file it for you after it is emailed to OUSF@occeemail.com.
- The Beneficiary must include the following:
 - A completed Affidavit, with required attachments; and
 - Any documentation that would assist the Administrator in evaluating the request.
- A *Request for OUSF Preapproval* submitted by a Beneficiary shall be signed by an authorized agent of the Beneficiary, or by the attorney for the Beneficiary.
- The Administrator will begin reviewing and processing the *Request for OUSF Preapproval* and supporting documentation to determine completeness consistent with OAC 165:59-3-66.
- ***Requests for OUSF Preapproval found to be missing required information*** (i.e., missing affidavits, bid information or other pertinent information) **may result in a denial of preapproval.**
- It is the intention of the Commission that each *Request for OUSF Preapproval* will be reviewed on a case-by-case basis.
- The Administrator may request additional information from the Beneficiary as is necessary to fully evaluate the *Request for OUSF Preapproval*. This information must be provided in a timely manner (generally ten (10) business days) from the date that such information is requested by the Administrator.
- Within ninety (90) days of submitting the *Request for OUSF Preapproval*, the Administrator will issue a Preapproval Funding Letter.
- After a Preapproval Funding Letter has been issued, a Beneficiary may submit a new *Request for OUSF Preapproval* to provide corrections or provide additional information; however, a new *Request for OUSF Preapproval* shall be submitted for each funding year. This new *Request for OUSF Preapproval* shall be submitted by sending via electronic mail a digital copy of all required documentation to the Administrator, to the email address OUSF@occeemail.com, and will be filed as a new OSF cause.
- Unless a Beneficiary receives a Preapproval Funding Letter, the Beneficiary shall not identify the OUSF as the source of secured funds for any purpose.
- The amount of OUSF funding preapproved shall be subject to adjustments based on the amount of support received from other sources, if any, as well as adjustments to pricing that may occur

between the time of preapproval and installation of service.

- Additional services that are installed beyond those contained in the *Request for OUSF Preapproval* shall require either a new *Request for OUSF Preapproval* or a *Request for OUSF Funding* to be filed.
- Variance from the terms approved in the Preapproval Funding Letter, which could have impacted bid selection may make the previously issued Preapproval Funding Letter null and void.
- If a Preapproval Funding Letter is issued, the Provider shall, within sixty (60) days of the start of service, file a *Request for OUSF Funding*. [17 O.S. § 139.106(D)(3)]

SECTION THREE: Filing Your Request for OUSF/OLF Funding

All Requests for Special Universal Services, Primary Universal Services, and Oklahoma Lifeline Funding must be filed with the Commission's Court Clerk. The below information provides an overview of the process. If you have additional questions concerning the filing of your Request, please contact the Court Clerk at (405) 522-8976.

- The Commission's Court Clerk's business hours are from 8:00 a.m. to 4:30 p.m., Monday through Friday, except on State holidays. The Court Clerk is frequently busy in the afternoons; therefore, we encourage you to file any Requests in the morning.
- The Commission's Court Clerk is located on the first floor of the Jim Thorpe Building, Room 130. The street address of the Jim Thorpe Building is 2101 North Lincoln Boulevard, Oklahoma City, Oklahoma 73105.
- There is no filing fee for Requests filed on the Oklahoma Universal Service Fund Docket ("OSF Docket").
- Pursuant to OAC 165:5-1-5(f), **filing documents on the OSF Docket by fax is prohibited.**
- The completed Request with attachments, along with four (4) copies, must be filed with the Commission's Court Clerk.
- The supporting documentation must be submitted directly to the Administrator in-person, or sent via email to OUSF@occemail.com. For documents that have a file size over 10 MB, please contact the Administrator to determine the best method for transferring the documentation.
- A copy of the Request and one set of supporting documentation is required to be delivered to the Oklahoma Attorney General ("AG"). To ensure that you have the accurate contact information for the AG, please contact the Administrator.
- Additionally, a copy of the Request should be provided to the Beneficiary, and upon request, to each telecommunications carrier in the State of Oklahoma. The Administrator shall provide a list of the contributors to the OUSF upon request by an eligible telecommunications carrier or eligible service provider.

SECTION FOUR: Administrator's Funding Determination

- The Administrator will begin reviewing and processing the Request and supporting documentation to determine completeness consistent with OAC 165:59-3-68 for Special Universal Service requests, 165:59-3-70 for Primary Universal Service requests, or 165:59-9-25 for Oklahoma Lifeline requests.
- **Requests found to be missing required information** (i.e., affidavits, bid information, invoices, contracts, tariffs, appropriate SUSF forms, etc.) **may result in a denial of the requested funding.** (Reference: OAC 165:59-3-68(e) and 165:59-3-70(e)).
- It is the intention of the Commission that each funding request will be reviewed on a case-by-case basis.
- The Administrator may request additional information from the eligible service provider, eligible telecommunications carrier, or the Beneficiary as is necessary to fully evaluate the Request. This information must be provided in a timely manner (generally ten (10) business days) from the date that such information is requested by the Administrator.
- Within ninety (90) days of filing the Request, the Administrator will issue a Funding Determination. If a Preapproval Funding Letter was issued, and the reviewed information remains the same, a Funding Determination will issue within sixty (60) days.
- **Request for Reconsideration:** Any adversely affected party shall have fifteen (15) calendar days to file a Request for Reconsideration by the Commission of the Determination made by the Administrator.
 - Prior to filing a Request for Reconsideration, we encourage you to contact the Administrator so that a hearing can be timely heard.
 - The party requesting reconsideration shall give notice of the request for reconsideration to the provider making the Request for OUSF Funding, the Attorney General, the Administrator, the Beneficiary, and all parties to the Cause.
 - Upon filing the Request for Reconsideration and the Notice of Hearing, the Request for Reconsideration shall, without Commission order, be assigned to an Administrative Law Judge (“ALJ”), and set for hearing on the next regularly scheduled prehearing conference date, which is at least five (5) business days after the date of filing, unless the parties agree or the Commission directs otherwise.
 - The procedure for requests for reconsideration is in OAC 165:59-3-72.

SECTION FIVE: PUSF/SUSF Forms***Primary Universal Service Request Form (PUSF)***

The PUSF shall be filed with every Request for Primary Universal Service funding.

PUSF-Sections 1 through 4**Section 1: Lines 1 through 14**

This Section requests general information about the Request including the Provider's name, six digit company specific code (provided by the Administrator), Provider's address, Provider and attorney contact information, indicate if Access lines are more or less than 75,000, and under which statutory provision funding is being requested. Use a separate form for each category of request.

Section 2: Lines 15 through 19

This section requests if the Minimum Filing Requirement ("MFR"), as outlined in OAC 165:59-3-70, was provided in the Request or was available for review at the time the Request was filed. On line 17, the Provider is to enter amounts in "column C" that represent one-time or lump sum support payments. Amounts to be reflected in "column D" represent monthly recurring support payment requests (if applicable). On line 18 and 19, indicate the start and end dates (if applicable).

Schedules must be included showing specifically how line 17 amounts were calculated. Provide detailed information regarding the changes in cost and/or revenues which resulted in the filing of the Request, and a narrative discussing the basis of the calculations of the changes in revenue and cost. Indicate whether the request relates to a one-time lump-sum payment and/or monthly recurring payments by entering amounts in appropriate columns.

Section 3: Lines 20 through 23

This section requests information on alternative funding. The Provider requesting OUSF funding for primary universal service shall make every reasonable and timely effort to obtain funding from alternative funding sources designated to support universal service. The Provider shall submit all documentation of the efforts to obtain alternative funding as a part of its Request, or an explanation for why alternative funding is not available. Upon the Provider producing the documentation that it has sought alternative funding sources or an explanation for why alternative funding is not available, the Provider shall not be precluded from having its Request processed. (OAC 165:59-3-70(g)).

If a Provider receives funding from alternative funding sources for an investment or expense already reimbursed by the OUSF, the Provider shall refund the double collection to the OUSF by either reducing a prospective funding request from the OUSF by an equivalent amount or remitting cash payment to the OUSF. Under no circumstances will double recovery be allowed. (OAC 165:59-3-70(g) & (h)).

Section 4: Lines 24 through 27

This section requests the company representative's name and title sponsoring the PUSF and their signature and date signed.

Special Universal Service Request Form (Form SUSF)

Internet Access for Schools, Libraries, and Eligible Healthcare Entities

- **INTRODUCTION**

- (1) Special Universal Services means the telecommunications services supported by the OUSF (typically broadband services such as Internet access and Wide Area Network services) which are furnished to public schools, public libraries and eligible health care entities as provided for in 17 O.S. §§ 139.101 *et seq.*
- (2) If the applicable fund request forms are not included with the filed Request, the Provider shall submit copies of all applicable fund request forms with its Request to the Administrator. All supporting work papers are to be provided directly to the Administrator and the AG. In some instances, the Administrator requires the document to be provided in a particular format, such as Excel.
- (3) The Healthcare Entity Affidavit in Section 4, Attachment 1 – License/Certifications request the eligible health care entity provide its qualification/verification as part of a consortium, if any. One means to verify the requesting eligible health care entity as a part of a consortium recognized by Universal Service Administrative Company (“USAC”) is to submit a copy of USAC’s Consortium Letter of Agency.

- **Form SUSF Section 1**

Lines 1 through 3

This Section requests supporting documentation such as contract/agreement, invoices from eligible service provider, and whether there are any credits on adjustments other than E-rate/OUSF credits on the invoices and provide any explanation if there is any adjustment or credit on an invoice.

- **Form SUSF Section 2**

Lines 4 through 6

The Provider shall include information identifying the Beneficiary, including the school, library, or healthcare entity’s name, address, and the Org-location code assigned by the Administrator.

Form SUSF Section 3

This is simply space given for the Provider to include any additional comments related to the Request.

Form SUSF Section 4

This space is provided for the name, title, and email address of the Provider representative sponsoring this Form SUSF, as well as the date it was signed.

Oklahoma Lifeline Fund Request Form (Form OLF - 1)

Lifeline Reimbursement Request

- **INTRODUCTION**

- (1) The Provider is to file copies of all applicable fund request forms with its Request for OLF Funding.
- (2) All supporting work papers are to be provided directly to the Administrator and the AG.
- (3) The Oklahoma Universal Service Fund Lifeline Reimbursement Request Form OLF-1 is available at the following website: <http://www.occeweb.com/pu/OUSF/OUSF.htm>.
- (4) A Form OLF-1 must be submitted for each month in which funding is being requested.

- **Form OLF-1 Header**

Submission Date is the date the reimbursement request is filed. Data Month is the month during which service was provided to the Lifeline subscribers included in Section 1.

- **Form OLF-1 Section 1**

Lines 1 through 8

The Provider is to provide the full Company name and the Company Specific Service Provider Identification provided by USAC for the Provider and general contact information.

- **Form OLF-1 Section 2**

Lines 9 through 23

The OLF support is limited to \$0.02 per line, per month. In this Section the Provider is to list the number of access lines by each eligibility category for which funding is being requested and the total amount of OLF funding being requested for each eligibility category. Line 23 is the total number of access lines associated with the request and the total amount of OLF funding being requested for the month. A Form OLF-1 must be submitted for each month in which funding is being requested.

The Provider must also maintain on file, at the office location, a copy of all certification relied upon to support the eligibility of the individuals associated with the access lines reflected on the form, which may be reviewed by the Administrator upon request.

- **Form OLF-1 Section 3**

Lines 24 through 27

The Provider shall make every reasonable and timely effort to obtain funding from alternative or additional funding sources designated to support Lifeline Universal Service. However, such efforts shall not delay the company's ability to pursue funding from the OLF. If a Provider receives funding from alternative funding sources for an investment or expense already reimbursed by the OLF, the company shall reduce the amount of any prospective funding request from the OLF by an equivalent amount.

Under no circumstances will double recovery be allowed. (OAC 165:59-3-62(d)) Receipt of funding from the federal Universal Service Fund for the provision of Lifeline service is not considered double recovery.

The Provider should specifically indicate, yes or no, if it has, or intends to, request funding support from all possible alternative or additional funding sources designated to support Universal Service. If “no” then the Provider should explain why.

The Provider is to indicate, and if applicable provide details regarding, any funding support actually received from an alternative source. The Provider should also indicate and discuss any notification received from an alternative funding source indicating that funding will be received.

- **Form OLF-1 Section 4**

Line 28 is simply space given for the Provider to provide any additional comments related to the Request for OLF Funding.

- **Form OLF-1 Section 5**

Lines 29 through 32

This space is provided for the name, title, and signature of the Company representative sponsoring this Form OLF-1, as well as the date it was signed.

SUSF School Worksheet Tab Instructions

- Invoice Date (column A)
 - Enter the date of the invoice which contains the charges for the given service period.
- Beginning Service Date Included (column B)
 - Enter the first date of the service period being requested.
- Ending Service Date Included (column C)
 - Enter the final date of the service period being requested.
 - Service periods may be no longer than one month; if a service period of greater than one month appears on the invoice, it must be prorated and requested as separate line items.
 - Funding should not be requested for service beyond the end of the current disbursement month, regardless of invoice date.
- Type of Service (column D)
 - For recurring charges, enter “Internet” or “WAN.”
 - For non-recurring charges (construction, installation, upgrade fees, etc.), enter “Non-Recurring.”
- Circuit ID (column E)
 - Enter the ID of the circuit which provides the service to the enduser.
 - In order to avoid database errors, please be sure to use the exact Circuit ID that was established in a Cause or Change Request (if applicable). If you have questions about this item, please contact the Administrator.
- Total Invoiced Charges for Services excluding fees and taxes (column F)
 - Enter the full invoiced charge for the service, before any adjustments or ineligible charges are removed. The amount should include all components of the service (e.g., Internet maintenance, managed router, QoS). Do not enter component charges as separate line items.
 - Enter only charges that are directly applicable to the service (e.g., telephone charges should not be included for an Internet line), even if other charges are included on the same invoice.
 - This amount should be prorated for partial-month service periods (e.g., if a circuit was disconnected mid-month). Please use the correct amount of days of the month that contains the proration.
- Disallowance due to 18-month Rule (column G)
 - If the service period for which the OUSF funding is requested is/are prior to the 18-month based on the Request filed date then OUSF funding for beyond 18-month will be disallowed.
 - If the 18-Month date remains in between the service period for which the OUSF funding is requested then proration of that invoice is not necessary.
- Ineligible Charges (column H)
 - ***This column will be completed by the Administrator***
- OUSF Eligible Invoice Amount (column I)
 - The amount in this column will auto populate based on the amount listed under column F and G.
- E-rate Discount % (column M)
 - Enter the E-rate discount rate for the given funding year.
 - If a commitment has not yet been issued, use the “Original” discount rate from FCC Form 471.
- Requested Funding Amount (column P)
 - Enter the amount of funding requested. Generally, this should equal the Monthly Net of E-rate.
- OK Company Code (column R)
 - Enter the service provider ID (OKOO####)
 - The Code is assigned by OUSF Fund Manager (GVNW)
- Organization Code (column U)
 - Enter the organization code for the Beneficiary.
 - This information can be found under Organization Code (OrgLoc) Codes for Eligible OUSF

entities under OUSF Form by visiting: <http://www.occeweb.com/pu/OUSF/OUSF.htm>

- Location Code (column V)
 - Enter the location code of the School the circuit serves.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat the step above for each circuit.
 - This information can be found under Organization Code (OrgLoc) Codes for Eligible OUSF entities under OUSF Form by visiting: <http://www.occeweb.com/pu/OUSF/OUSF.htm>
- Demarc Address (column W)
 - Enter the address where the School's circuit is located.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat the step above for each circuit.
- City (column X)
 - Enter the city name where circuit is located.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat the step above for each circuit.
- Zip Code (column Y)
 - Enter the zip code where circuit is located.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat the step above for each circuit.
- Demarc Name (column Z)
 - Enter the name of the School to identify the Demarc.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat the step above for each circuit.
- Circuit Disconnect Date (column AA)
 - If the circuit has been disconnected, enter the final date on which service was provided and the customer was charged; otherwise, leave this space blank.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then enter Circuit Disconnect Date for each circuit.
- Bandwidth (column AB)
 - Enter the bandwidth number only (no MB/GB identifiers) for service.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then enter the bandwidth for each circuit.
- Bandwidth Measurement (column AC)
 - Enter MB/GB (no numbers) for service.
- E-rate BEN (column AD)
 - Enter the BEN number of Beneficiary.
- E-rate Year (column AE)
 - The E-rate Funding Year in which the service period falls.
 - This column is calculated when the Check Data macro is run; **you do not need to enter a value.**

SUSF Library Worksheet Tab Instructions

- Invoice Date (column A)
 - Enter the date of the invoice which contains the charges for the given service period.
- Beginning Service Date Included (column B)
 - Enter the first date of the service period being requested.
- Ending Service Date Included (column C)
 - Enter the final date of the service period being requested.
 - Service periods may be no longer than one month; if a service period of greater than one month appears on the invoice, it must be prorated and requested as separate line items.
 - Funding should not be requested for service beyond the end of the current disbursement month, regardless of invoice date.
- Type of Service (column D)
 - For recurring charges, enter “Internet” or “WAN.”
 - For non-recurring charges (construction, installation, upgrade fees, etc.), enter “Non-Recurring.”
- Circuit ID (column E)
 - Enter the ID of the circuit which provides the service to the end user.
 - In order to avoid database errors, please be sure to use the exact Circuit ID that was established in a Cause or Change Request (if applicable). If you have questions about this item, please contact the Administrator.
- Total Invoiced Charges for Services excluding fees and taxes (column F)
 - Enter the full invoiced charge for the service, before any adjustments or ineligible charges are removed. The amount should include all components of the service (e.g., Internet maintenance, managed router, QoS). Do not enter component charges as separate line items.
 - Enter only charges that are directly applicable to the service (e.g., telephone charges should not be included for an Internet line), even if other charges are included on the same invoice.
 - This amount should be prorated for partial-month service periods (e.g., if a circuit was disconnected mid-month). Please use the correct amount of days of the month that contains the proration.
- Disallowance due to 18-month Rule (column G)
 - If the service period for which the OUSF funding is requested is/are prior to the 18-month based on the Request filed date then OUSF funding for beyond the 18-month will be disallowed.
 - If the 18-Month date remains in between the service period for which the OUSF funding is requested then proration of that invoice is not necessary.
- Ineligible Charges (column H)
 - ***This column will be completed by the Administrator***
- OUSF Eligible Invoice Amount (column I)
 - The amount in this column will auto populate based on the amount listed under column F and G.
- E-rate Discount % (column M)
 - Enter the E-rate discount rate for the given funding year.
 - If a commitment has not yet been issued, use the “Original” discount rate from the FCC Form 471.
- Company Requested Funding Amount (column P)
 - Enter the amount of funding requested. Generally, this should equal the Monthly Net of E-rate.
- OK Company Code (column R)
 - Enter the service provider ID (OKOO####)
 - The Code is assigned by the OUSF Fund Manager (GVNW)
- Organization Code (column U)
 - Enter the organization code for the Beneficiary.

- This information can be found under Organization Code (OrgLoc) Codes for Eligible OUSF entities under OUSF Form by visiting: <http://www.occeweb.com/pu/OUSF/OUSF.htm>
- Location Code (column V)
 - Enter the location code of the Library the circuit serves.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat step above for each circuit.
 - This information can be found under Organization Code (OrgLoc) Codes for Eligible OUSF entities under OUSF Form by visiting: <http://www.occeweb.com/pu/OUSF/OUSF.htm>
- Demarc Address (column W)
 - Enter the address where the Library's circuit is located.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat the step above for each circuit.
- City (column X)
 - Enter the city name where circuit is located.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat the step above for each circuit.
- Zip code (column Y)
 - Enter the zip code where circuit is located.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat the step above for each circuit.
- Circuit Disconnect Date (column Z)
 - If the circuit has been disconnected, enter the final date on which service was provided and the customer was charged; otherwise, leave this space blank.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat the step above for each circuit.
- Bandwidth (column AA)
 - Enter the bandwidth number only (no MB/GB identifiers) for service.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat the step above for each circuit.
- Bandwidth Measurement (column AB)
 - Enter MB/GB (no numbers) for service.
- E-rate BEN (column AC)
 - Enter the BEN number of Beneficiary.
 - If the Library is part of a Library System and federal funding for this Beneficiary is requested as part of the Library System then please use the System BEN number and not the individual Library BEN number.
- E-rate Year (column AD)
 - The E-rate Funding Year in which the service period falls.
 - This column is calculated when the Check Data macro is run; **you do not need to enter a value.**

SUSF Telemedicine Worksheet Tab Instructions

- Invoice Date (column A)
 - Enter the date of the invoice which contains the charges for the given service period.
- Beginning Service Date Included (column B)
 - Enter the first date of the service period being requested.
- Ending Service Date Included (column C)
 - Enter the final date of the service period being requested.
 - Service periods may be no longer than one month; if a service period of greater than one month appears on the invoice, it must be prorated and requested as separate line items.
 - Funding should not be requested for service beyond the end of the current disbursement month, regardless of invoice date.
- Type of Service (column D)
 - For recurring charges, enter “Internet” or “WAN.”
 - For non-recurring charges (construction, installation, upgrade fees, etc.), enter “Non-Recurring.”
- Circuit ID (column E)
 - Enter the ID of the circuit which provides the service to the end user.
 - In order to avoid database errors, please be sure to use the exact Circuit ID that was established in a Cause or Change Request (if applicable). If you have questions about this item, please contact the Administrator.
- Total Invoiced Charges for Services excluding fees and taxes (column F)
 - Enter the full invoiced charge for the service, before any adjustments or ineligible charges are removed. The amount should include all components of the service (e.g., Internet maintenance, managed router, QoS). Do not enter component charges as separate line items.
 - Enter only charges that are directly applicable to the service (e.g., telephone charges should not be included for an Internet line), even if other charges are included on the same invoice.
 - This amount should be prorated for partial-month service periods (e.g., if a circuit was disconnected mid-month). Please use the correct amount of days of the month that contains the proration.
- Disallowance due to 18-month Rule (column G)
 - If the service period for which the OUSF funding is requested is/are prior to the 18-month based on the Request filed date then OUSF funding for beyond 18-month will be disallowed.
 - If the 18-Month date remains in between the service period for which the OUSF funding is requested then proration of that invoice is not necessary.
- Eligible Invoice Amount at Invoiced Bandwidth (column I)
 - The amount in this column will auto populate based on the amount listed under column F and G
- Federal Funding Percentage (column O)
 - The monthly amount of Rural Health Care Funding, committed for the service, as a percentage of the total invoice amount, rounded to two decimal places.
 - For the Healthcare Connect Fund, this should be 65%, times the pro rate adjustment factor (if any)
 - For the Telecommunications Program, this should be calculated by dividing the monthly commitment funding by the Actual Monthly Invoice Amount.
- Requested Funding Amount (column R)
 - Enter the amount of funding requested. Generally, this should equal the Monthly Net of Federal Funding Amount.
- OK Company Code (column T)
 - Enter the service provider ID (OKOO####)
 - The Code is assigned by OUSF Fund Manager (GVNW)
- Organization Code (column W)
 - Enter the organization code for the Beneficiary.

- This information can be found under Organization Code (OrgLoc) Codes for Eligible OUSF entities under OUSF Form by visiting:
<http://www.occeweb.com/pu/OUSF/OUSF.htm>
- Location Code (column X)
 - Enter the location code of the Healthcare Entity the circuit serves.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat the step above for each circuit.
 - This information can be found under Organization Code (OrgLoc) Codes for Eligible OUSF entities under OUSF Form by visiting:
<http://www.occeweb.com/pu/OUSF/OUSF.htm>
- Healthcare Provider Number (column Y)
 - Enter the HCP number of Beneficiary.
 - If the Healthcare Entity is a part of consortium and federal funding for this Beneficiary is requested as part of the consortium then please use the consortium BEN number and not the individual Healthcare provider number.
- Demarc Address (column Z)
 - Enter the address where the Healthcare Entity's circuit is located.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat the step above for each circuit.
- City (column AA)
 - Enter the city name where circuit is located.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat the step above for each circuit.
- Zip code (column AB)
 - Enter the zip code where circuit is located.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat the step above for each circuit.
- Circuit Disconnect Date (column AC)
 - If the circuit has been disconnected, enter the final date on which service was provided and the customer was charged; otherwise, leave this space blank.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) the repeat the step above for each circuit.
- Actual Billed Bandwidth (column AD)
 - Enter the bandwidth number only (no MB/GB identifiers) for service.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat the step above for each circuit.
- Actual Billed Bandwidth Measurement (column AE)
 - Enter MB/GB (no numbers) for service.
 - If the OUSF funding is requested for multiple circuits (Internet or WAN or both) then repeat the step above for each circuit.
- USAC RHC Year (column AH)
 - The USAC RHC Funding Year in which the service period falls.
 - This column is calculated when the Check Data macro is run; **you do not need to enter a value.**

Definitions

"Administrator" means the Director of the Public Utility Division of the Corporation Commission.

"Consortium" means two or more Oklahoma Universal Service Fund Beneficiaries that choose to request support under the Federal Universal Service Support Mechanism or successor program or programs as a single entity.

"Eligible healthcare entity" means a not-for-profit hospital, county health department, city-county health department, not-for-profit mental health and substance abuse facility or Federally Qualified Health Center in Oklahoma. Eligible healthcare entity shall also include telemedicine services provided by the Oklahoma Department of Corrections at facilities identified in Section 509 of Title 57 of the Oklahoma Statutes.

"Eligible provider" means, for purposes of Special Universal Services, providers of telecommunications services which hold a Certificate of Convenience and Necessity and OneNet.

"Federally Qualified Health Center" or "(FQHC)" means an entity which:

- is receiving a grant under Section 330 of the Public Health Service (PHS) Act, 42 U.S.C., Section 254b, or is receiving funding from a grant under a contract with the recipient of such a grant and meets the requirements to receive a grant under Section 330 of the PHS Act,
- based on the recommendation of the Health Resources and Services Administration within the Public Health Service, is determined by the Secretary of the Department of Health and Human Services to meet the requirements for receiving a grant as described in subparagraph a of this paragraph,
- was treated by the Secretary of the Department of Health and Human Services, for purposes of part B of Section 330 of the PHS Act, as a comprehensive federally funded health center as of January 1, 1990, or
- is an outpatient health program or facility operated by a tribe or tribal organization under the Indian Self-Determination Act, 25 U.S.C., Section 450f et seq., or by an urban Indian organization receiving funds under Title V of the Indian Health Care Improvement Act, 25 U.S.C., Section 1651 et seq.

"Grant" means funding received from an organization unaffiliated with the Beneficiary, which includes government or non-government organizations, pertaining to Special Universal Services, Internet or WAN access, or Category I equipment as defined by the FCC.

"Hospital" means a healthcare entity that has been granted a license as a hospital by the Oklahoma Department of Health for that particular location.

"Internet" means the international research-oriented network comprised of business, government, academic and other networks.

"Lowest Cost Reasonable Qualifying Bid or LCRQB" means a bid that: 1) represents the lowest total cost proposal including monthly recurring and nonrecurring charges for eligible services, 2) is reasonable to meet the needs of the Oklahoma Universal Service Fund Beneficiary as listed in the request for bids, 3) is submitted during the same competitive bidding period as the awarded bid, 4) is for a bandwidth within the range requested for bid and selected by the Oklahoma Universal Service Fund Beneficiary, 5) is for the same contract term as the bid that was selected by the Oklahoma Universal Service Fund Beneficiary, 6) meets the requirements specified in the request for bid by the Oklahoma Universal Service Fund Beneficiary, and 7) was the result of a fair and open competitive bidding process as defined in this act.

"Not-for-profit hospital" means: 1) a hospital located in this state which has been licensed as a hospital at that location pursuant to Section 1-701 et seq. of Title 63 of the Oklahoma Statutes for the diagnosis, treatment, or care of patients in order to obtain medical care, surgical care or obstetrical care and which is established as exempt from taxation pursuant to the provisions of the Internal Revenue Code, 26 U.S.C., Section 501(c)(3), or a hospital located in this state which is licensed as a hospital at that location pursuant to Section 1-701 et seq. of Title 63 of the Oklahoma Statutes and is owned by a municipality, county, the state or a public trust for the diagnosis, treatment, or care of patients in order to obtain medical care, surgical care, or obstetrical care.

"Not-for-profit mental health and substance abuse facility" means a facility, not for the sole purpose of administration, which is operated by the Department of Mental Health and Substance Abuse Services or a facility certified by the Department of Mental Health and Substance Abuse Services as a Community Mental Health Care Center, a Community-Based Structured Crisis Center or a Community Comprehensive Addiction Recovery Center.

"Owner" means another organization that legally owns the actual healthcare entity (e.g., a parent company).

"Public Library" or "Library" means a library or library system that is freely open to all persons under identical conditions and which is supported in whole or in part by public funds. Public library shall not include libraries operated as part of any university, college, school museum, the Oklahoma Historical Society or county law libraries.

"Public School" or "School" means all free schools supported by public taxation, and shall include grades prekindergarten through twelve and technology center schools that provide vocational and technical instruction for high school students who attend the technology center school on a tuition-free basis. Public school shall not include private schools, home schools or virtual schools.

"Telemedicine service" means the practice of health care delivery, diagnosis, consultation and treatment, including but not limited to the transfer of medical data or exchange of medical education information by means of audio, video or data communications. Telemedicine service shall not mean a consultation provided by telephone or facsimile machine.

"WAN" means a wide-area network that exists over a large-scale geographical area. A WAN connects different smaller networks, including local area networks and metro area networks, which ensures that computers and users in one location can communicate with computers and users in other locations.

For more definitions please visit:

<http://www.oscn.net/applications/oscn/Index.asp?ftdb=STOKST17> for Title 17 of the Oklahoma Statutes and scroll to § 139.102.