Change Request ("CR") Submissions

General Instructions

1. Email CR Submissions to PUDSubmissions@occemail.com.
    a. Email subject line should be "OUSF – [Carrier] – CR Submission" or similar.
2. CR submission period is from the 26th to the 25th of the month for approval by the 25th of the following month.
    a. Example: A CR submission received between January 26 and February 25 will be evaluated by March 25 (unless the CR has to be deferred).
3. If a CR is approved, funding should be requested on the following month's Monthly Payment Request ("MPR") Worksheet.
    a. Example: A CR submission received between January 26 and February 25 will be evaluated by March 25 (unless the CR has to be deferred). If the CR is approved, the carrier can include the CR and catch-up amounts on the April MPR submission (due by April 10). Funding would be disbursed by April 25.
4. The Monthly Payment Team ("MPT") may, in rare instances, find it necessary to defer CR submissions beyond the 25th of the month in order to gather more information or perform a more thorough review. The Administrator will cease current OUSF funding for any CR submission with outstanding issues not resolved within 60 days, and a new Application will be required in order to receive ongoing funding, pursuant to OAC 165:59-3-68(o).
5. The MPT will not hold documents from an incomplete CR submission. If a CR submission is not complete by the 25th, a new (complete) submission will be required during the next submission window.
6. The MPT will not review change requests for service changes occurring earlier than 18 months prior to the submission date.
7. **Required CR documents**:
    a. Change Request Form, which is a PDF document as described below.
    b. Beneficiary's Affidavit in Support of Request for Special Universal Services.
    c. All attachments required as part of the Beneficiary's Affidavit.
    d. One Change Request Excel Worksheet that includes all change requests submitted in a submission window.
    e. Multiple Circuit Worksheet (if the change request is for more than one circuit).
    f. Invoice immediately prior to the change and invoice immediately after the change.
8. The MPT will send an email notification of CR approval or CR non-approval to the beneficiary and carrier within 60 days of the CR submission.
9. If you have any questions, you can email the Monthly Payment Team:
    a. Kris Prouty (k.prouty@occemail.com)
    b. Carolyn Weber (c.weber@occemail.com)
    c. John Givens (j.givens@occemail.com)
    d. Taylor Lewis (t.lewis@occemail.com)
    e. Cindy McGraw (c.mcgraw@occemail.com)

Change Request Form (PDF)

1. Enter the date the CR form was completed.
2. Section 1: Service Provider Information
   a. Enter the service provider name.
   b. Enter service provider contact information for the person(s) who can answer questions the MPT may have about the CR.
3. Section 2: Beneficiary Information
   a. Select the beneficiary type.
   b. Enter the beneficiary name.
   c. Enter beneficiary contact information for the person(s) who can answer questions the MPT may have about the CR.
4. Section 3: Change Request
   a. Enter the cause number where funding was originally approved for this circuit.
   b. Enter the date the change happened.
   c. Enter the type of change.
   d. Enter the type of service.
   e. Enter the bandwidth, circuit ID, and invoice amount in effect prior to the change.
   f. Enter the bandwidth, circuit ID, and invoice amount in effect after the change.
5. Attachment: Multiple Circuit Worksheet
   a. There is no template for this document. If you are requesting a change to multiple related circuits (e.g., several WAN lines within a single school district) on a single Change Request Form, create a simple Excel worksheet summarizing the information required in Section 3 of the Form for each circuit requested.

Change Request Worksheet (Excel)

1. Introduction Tab
   a. Enter the service provider ID (OK00####).
   b. Enter the service provider name.
   c. Enter the name of the submission preparer.
   d. Enter the date the change request worksheet was completed.
2. Circuit Data Tab
   a. Beneficiary/Circuit Name (column A)
      i. Use this space to identify the circuit – you may enter whatever is helpful to you here. While it is not recommended, you may leave it blank if you prefer.
      ii. This column is primarily for your benefit. This information is not required and is not uploaded to the OUSF database.
   b. Effective Date of Change (column B)
      i. Enter the date the change took place.
   c. Circuit ID before change (column C)
      i. Enter the circuit ID prior to the change. May be the same as column D.
   d. Circuit ID after change (column D)

        i. Enter the circuit ID after the change. May be the same as column C.
    e. Bandwidth* (column E)
        i. Enter the bandwidth number only (no MB/GB identifiers) for service after the change took place.
    f. Bandwidth Units (column F)
        i. Enter MB/GB (no numbers) for service after the change took place.
    g. Actual Monthly Invoice Amount (column G)
        i. Enter the invoice amount here (including taxes, fees, items that aren't OUSF eligible, etc.) for the requested service after the change took place.
            1. If the change took place in the middle of a billing period, enter the Monthly Invoice Amount for a full billing period. Do not prorate the Monthly Invoice Amount on this worksheet.
                a. Any necessary proration will take place on the Monthly Payment Request submission, if the requested change is approved.
    h. OUSF Determined Monthly Invoice Amount (column H)
        i. Enter the OUSF Determined Invoice Amount here (this will exclude all taxes, fees, and non-OUSF eligible charges) for service after the change took place.
            1. If the change took place in the middle of a billing period, enter the full OUSF Determined Invoice Amount for a full billing period. Do not prorate the OUSF Determined Invoice Amount on this worksheet.
                a. Any necessary proration will take place on the Monthly Payment Request submission, if the requested change is approved.
    i. Remarks (column I)
        i. Enter any comments you may have. This column is not required.
3. Check Data
    a. Once you have entered all data in the Circuit Data tab, return to the Introduction tab and click the green "Check Data Now" button to run the Check Data macro. A dialog box should pop up informing you of any errors; review and correct the errors (highlighted in red) and run the macro again.
    b. If you are having trouble running the Check Data macro, make sure macros are enabled in Excel.