C-BAND

RPC

RELOCATION PAYMENT CLEARINGHOUSE

ACTUAL COSTS REIMBURSEMENT CLAIM SUBMISSION USER GUIDE

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Contacts

Relocation Payment Clearinghouse LLC

Website: https://cbandrpc.com/

Email: info@cbandrpc.com

Address: 7501 Wisconsin Avenue
Suite 400E
Bethesda, MD 20814-6583

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1. Purpose

All reimbursement claims (Non-Lump Sum Claims) must be submitted to the Relocation Payment Clearinghouse ("RPC") and evaluated through the Coupa Supplier Portal ("Coupa" or "Coupa Portal"), the RPC's system for submitting and processing claims associated with the C-band relocation program. The Coupa Portal is the web-based system that provides a potential Claimant the ability to:

- Submit claims to the RPC;
- Track the status of its claim; and,
- Communicate with the RPC.

The purpose of this document is to provide eligible and approved Non-Lump Sum Claimants ("Claimants") with guidance on submitting claims for reimbursements ("claim" or "invoice") in the Coupa Portal.

For any questions regarding the Coupa claim submission process, please contact the RPC Service Desk via info@CbandRPC.com or 301-463-4676.

2. Introduction to the Use of the Coupa Portal

What is Coupa?

The RPC has selected Coupa as the system for C-band relocation claims submission and processing. Coupa is a cloud-based Business Spend Management application.

The RPC has configured Coupa for the C-band relocation program. Coupa, however, is a third-party platform, therefore some language native to the software application cannot be modified by the RPC. As a result, some of the terminology used within the Coupa Portal does not align directly with common terms used within the C-band relocation program. For example, in Coupa, a Claimant is referred to as a "Supplier" and the RPC is identified as a "Customer." Claims for Non-Lump Sum payments are submitted by utilizing an "invoice" template within Coupa. The **User Guides** prepared by the RPC located at www.CbandRPC.com/setup, address how standard Coupa terms align with RPC-specific processes.

There is some limited information collected within Coupa that is not directly required for the processing of C-band relocation claims. **In User Guides, the RPC indicates which fields are required for RPC claims submission and processing purposes. The RPC also provides guidance on how to populate fields that are configured into the standard Coupa application, but do not apply to RPC activities.**

Coupa Privacy Policy and Terms of Use

Claimants are required to accept the Coupa Privacy Policy & Terms of Use to access the portal. Data entered into the Coupa portal in the RPC "Customer" Profile is segregated and protected as Confidential Information from public disclosure and will only be provided to the RPC. All information uploaded into the Coupa portal will be subject to the RPC's Confidentiality Policy.

Information Security Safeguards

All information uploaded to the Coupa Portal will be subject to federal information security standards, including FedRAMP, consistent with the FCC's Report & Order[1] (para. 277).

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[1] *Expanding Flexible Use of the 3.7 to 4.2 GHz Band*, Report and Order and Order of Proposed Modification, 35 FCC Rcd 2343 (2020).
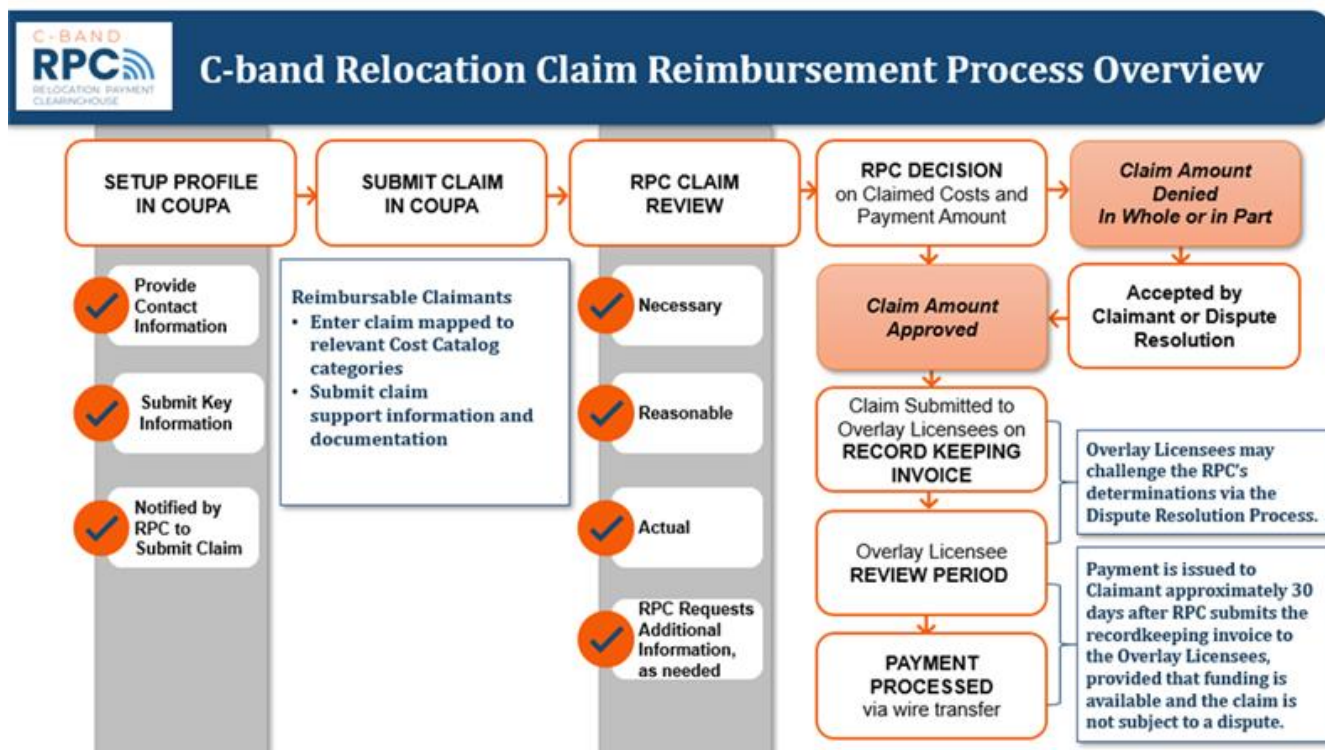
3. Coupa Portal Claim Submission Process

Prior to submitting a claim for reimbursement, the Claimant's profile must be submitted and approved by the RPC. Please see www.CbandRPC.com/setup for instructions on how to request an invitation to join the Coupa Portal and complete the profile setup process.

The C-band Handbook, located at www.CbandRPC.com/resources provides information regarding the eligibility for reimbursement.

An overview of the process to submit a claim for reimbursement is summarized in Figure 1, below, and described in more detail in the following sections.

FIGURE 1 COUPA PORTAL CLAIM SUBMISSION PROCESS OVERVIEW


3.1. Notification to Begin Claims Submission Process

Once the RPC approves a Claimant's Coupa profile, the Claimant can submit a claim in Coupa in one of several ways:

1) Create a claim by starting a blank invoice (See **Section 4.1 Submit Claim from a Blank Invoice**) where the fields will be populated by the Claimant; however, the "Description" field has the FCC Cost Catalog items pre-populated by the RPC (suggested for claims with few line items); or

2) Create a claim from a PO, where the RPC creates a PO based upon the Claim Summary provided by the Claimant to facilitate the claims submission process (suggested for claims with numerous line items and recurring line items) (See **Section 4.2 Submit Claim from a PO** for reference). The PO allows Claimants to more easily confirm that the claim amount ties to the Claim Summary and Cost Catalog and submit a claim.

Once the PO is completed, the Claimant will receive an email notification from Coupa stating "Your RPC Profile is Ready for Claims Submission". This email notifies the Claimant to initiate the claim submission process. The email refers to the pre-populated "PO" described in the previous paragraphs.

Upon receipt of the email shown in Figure 2 below, click **'View Order'** and perform the following steps to submit a claim:
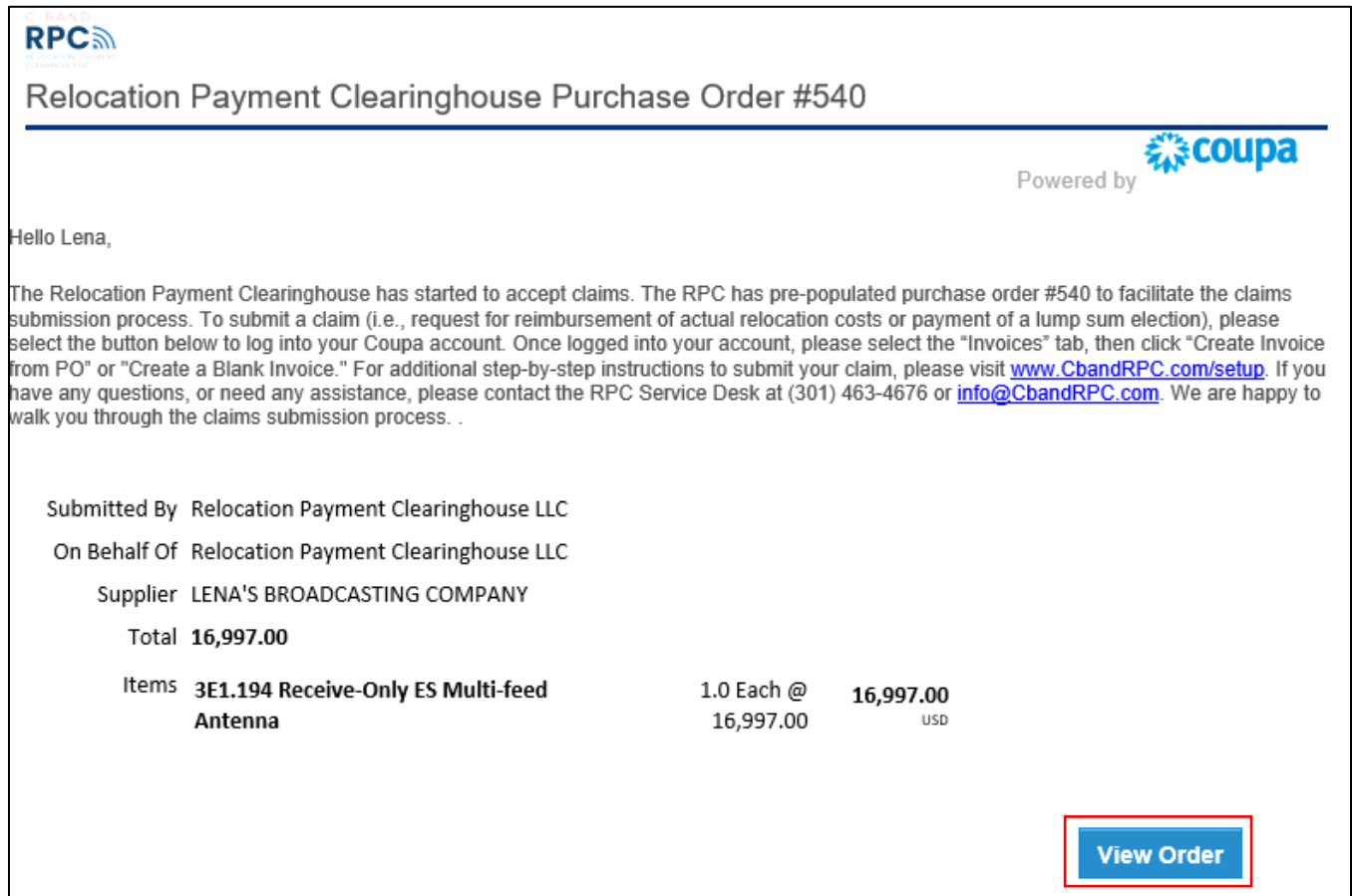
3.2.Initiate A Claim (Invoice)

To initiate a claim in the Coupa Portal, perform the following steps:

1. Open the Coupa Portal and select the "Invoices" tab (Figure 3 found on next page)
   - Create a claim by starting a blank invoice (See **Section 4.1 Submit Claim from a Blank Invoice**); or
   - Create a claim from a PO (See **Section 4.2 Submit Claim from a PO** for reference).

⚠️ **If the Claimant utilizes the PO function, an automated email notification will be sent once the PO is created, which enables the Claimant to submit the claim. If the Claimant is creating a "Blank Invoice," the Claimant will not receive an email notification from the RPC.**
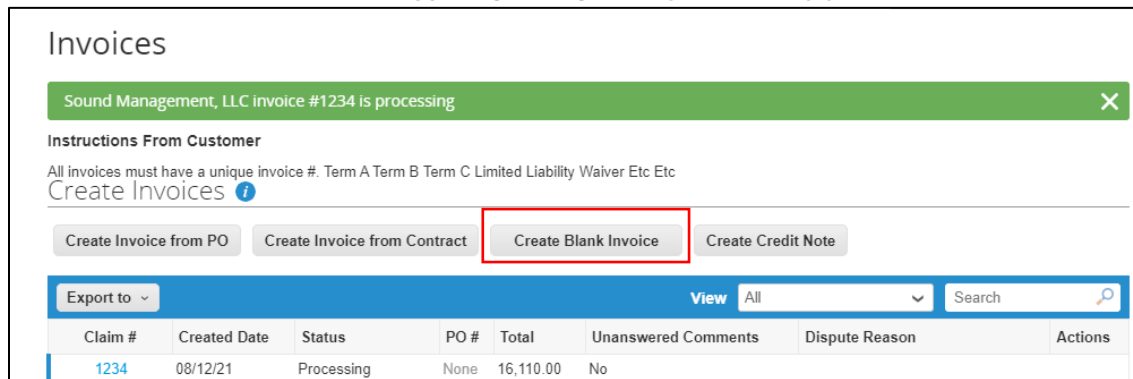
FIGURE 3 CREATE CLAIM FROM PO AND CREATE CLAIM FROM BLANK INVOICE
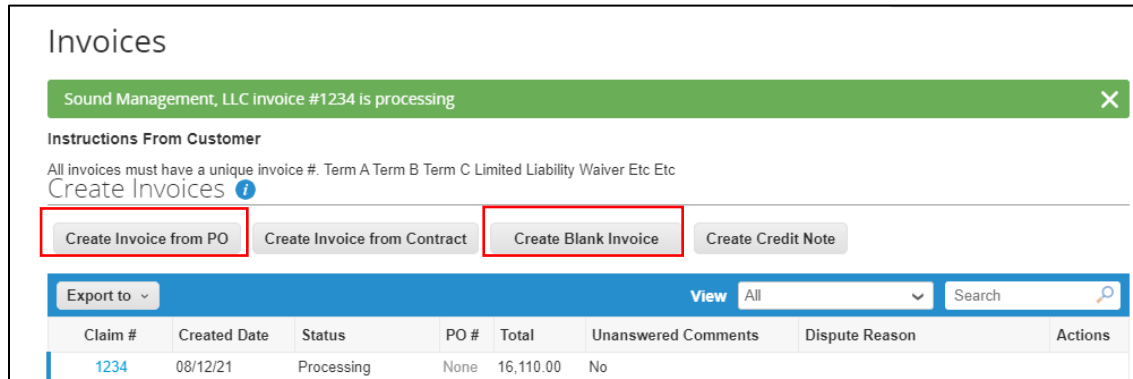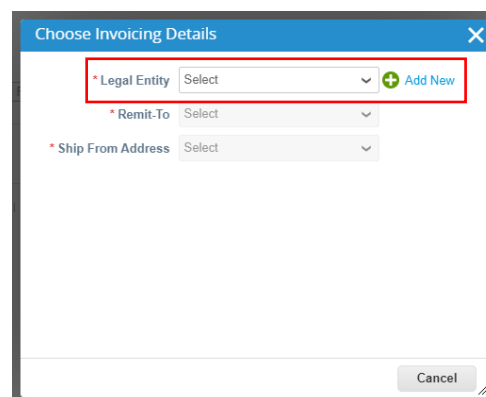

3.3. Submit Claim from a Blank Invoice

1. Click "Create Blank Invoice" (Figure 4 below).

FIGURE 4 CREATE CLAIM FROM BLANK INVOICE

2. Once you click "Create Blank Invoice", select your "Legal Entity" from the drop-down menu (Figure 5 below).

FIGURE 5 CHOOSE INVOICING DETAILS

3. After you have selected the applicable "Legal Entity" (Figure 6 below), click the "Save" button at the bottom of the screen.

FIGURE 6 SAVE INVOICING DETAILS

4. Once you save the entity information, the next screen will prompt you to populate the following fields (Figure 7 on the next page):
    *   **Claim Number**: Represents the number **you create** to assign to the claim.
    *   **Claim Date:** Represents the submission date of the claim.
    *   **Attachments:** Upload supporting documentation, including proof of payment. A full list of requested documentation can be found in the RPC Handbook located at: www.cbandrpc.com/resources. Please note, if documentation is missing, the RPC will reach out to obtain the required documents. If a website is being used to store supporting documentation, please include the relevant URL.
    *   **Certification:** Check the box to acknowledge the certification statement.

    ⚠️ ***Claims that do not contain the appropriate documentation prescribed above are at risk of being rejected. Reach out to the RPC team via the comment field at the bottom of the page for any inquiries regarding your documentation supporting your claim.***

FIGURE 7 CLAIM FIELDS – GENERAL INFO AND CERTIFICATION STATEMENT

Create Invoice Create

General Info

* Claim #	
* Claim Date	08/12/21
Payment Term	None
* Currency	USD
Status	Draft
Image Scan	Choose File No file chosen
Supplier Note	
* Attachments	Add File	URL	Text

From

* Supplier	Sound Management, LLC
* Invoice From Address	JR - SSO 7501 Wisconsin Ave Suite 400E Bethesda, MD 20814 United States
* Remit-To Address	JR - SSO 7501 Wisconsin Ave Suite 400E Bethesda, MD 20814 United States
* Ship From Address	JR - SSO 7501 Wisconsin Ave Suite 400E Bethesda, MD 20814 United States

I Certify That:

1. I am authorized by executive management to submit claims on behalf of my organization and the information and documentation submitted in support of this request for reimbursement are true, complete, and accurate to the best of my knowledge and belief.

2. All documents containing confidential information (as defined in the RPC Confidentiality Policy available at www.www.CbandRPC.com/setup) have been marked "CONFIDENTIAL INFORMATION" on each page where it appears.

3. Any sensitive personally identifiable information has been redacted or removed from all documents submitted, including: SSN, TIN, passport number, bank account or CC number, access or security codes (further details available at www.CbandRPC.com/FAQ).

4. The kinds, quantities and costs associated with the labor, goods, and/or services for which reimbursement is sought as part of this request are consistent with the kinds, quantities and costs set forth in the Transition Plan and/or Cost Catalog.

5. If not in the Transition Plan and/or Cost Catalog, a written justification has been included with this claim detailing the nature and type of costs incurred and the reasons these costs were necessary for C-band relocation.

6. The costs submitted for reimbursement as part of this request were necessary, reasonable, and actually incurred to implement C-band relocation.

7. To the extent applicable, internal control policies and procedures were followed when preparing cost estimates and incurring and paying reimbursable relocation costs.

8. All goods and/or services (including internal labor) for which reimbursement is claimed have been performed/received.

9. Payment, reflective of applicable credits, purchase allowances, and supplier/vendor discounts related to this and all prior claims, has been made as reflected in the supporting documentation.

10. This is my electronic signature.

* I acknowledge above ☐

5. Populate the following fields in Figure 8 on the next page for each line. Please note that the required fields are represented by *.
   - **Description**: Based upon the type of cost found in the Cost Catalog Tables.
   - **Quantity**: Based upon the quantity on the vendor invoice.
   - **Price**: Based upon the price per unit on the vendor invoice.
   - **Vendor Name**: Based upon an internal invoice or a third-party invoice name.

- **Vendor Invoice No**: Based upon an internal invoice or a third-party invoice number.
- **Vendor Invoice Date**: Based upon an internal invoice or a third-party invoice date.
- **Hard/Soft Cost**: Represents hard or soft costs as outlined in the RPC Handbook: www.cbandrpc.com/resources. Navigate to the right-hand side of the web page and click the handbook link.

FIGURE 8 CLAIM FIELDS – LINES

6. Next, click the Billing magnifying glass (Figure 8 above) to access a drop-down menu. Once the drop-down menu (Figure 9 below) is accessed, populate the following fields:
   - **Cost Catalog Cost Category:** the category of cost per the Cost Catalog.
   - **Catalog ID:** once the Cost Category is selected, choose the applicable item.
   - **Operator:** select the applicable ESO (for SSOs submitting internal costs, this field will be blank).
   - **CSA – Callsign – SiteID – AntennaID:** based on the operator (ESO) selected.
   - **PEA:** based on the CSA selected.

   Note: Once the appropriate fields are populated click 'Choose' to submit.

FIGURE 9 BILLING FIELDS – LINES

7. Once you click on "Choose", the billing information will populate on the invoice template as seen below in Figure 10.

FIGURE 10 BILLING INFORMATION

8. If you have more than one "Line", you may add a "Line" by clicking the above green "Add Line" button in Figure 10. ***Note: There is a limitation of 100 lines within Coupa. If a claim requires more than 100 lines, create a new invoice.*** Once selected, you will need to repeat steps 1 through 8 of Section **4.1 Submit Claim from a Blank Invoice**; OR
9. You can click "Pick Lines from PO" for which you would then follow the process outlined below (Section **4.2 Submit Claim from a PO**).
10. Once you have populated all of the applicable lines, click the "Calculate" button (Figure 11 on the next page). This will recalculate and add all of the populated line items.

FIGURE 11 CALCULATE INVOICE LINES

11. Once you have completed the process for all the lines for which you wish to submit a claim, click "Submit" (Figure 12 below).

FIGURE 12 SUBMIT INVOICE LINES

12. Once you click "Submit" the following message in Figure 13 below will appear. You will be given the option to "Continue Editing" your invoice or to "Send Invoice".

Figure 13 Send Invoice Lines

13. Coupa will not allow an invoice to be submitted without the required information populated from steps 2 through 12 above. Once you click "Send Invoice", if any of the required information is missing, the error message (Figure 14 on the next page) below would appear.

FIGURE 14 MISSING REQUIREMENTS MESSAGE

14. If all the required information is filled correctly, you will see the screen below (Figure 15) and note the green bar at the top of the screen.

FIGURE 15 SUCCESSFUL SUBMISSION

15. Once you submit your claim, it will immediately be visible to RPC for review.

3.4. Submit Claim from a PO

1. Click "Create Invoice from PO" (Figure 16 below).

FIGURE 16 CREATE INVOICE FROM PO
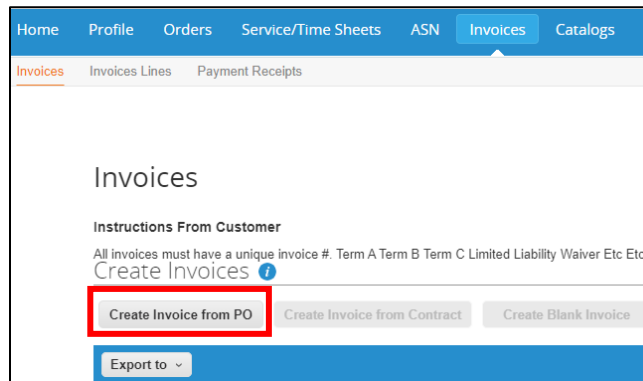
2. Click the PO number that was created for your claim by the RPC. This will be identified in the email notification shown in **Section 3 - Notification to Begin Claims Submission Process** above. Scroll to the bottom of the "Invoice" page and click "Create Invoice".

FIGURE 17 PO PAGE – CREATE INVOICE
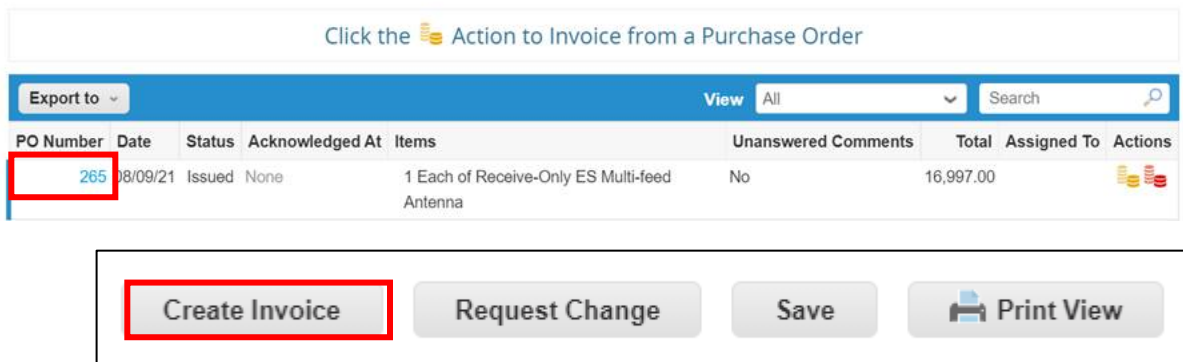
⚠️ *Claimants may have more than one PO based upon the data provided within the respective Claim Summary. Coupa limits POs to a specific number of lines. POs exceeding the 100-line limit will result in multiple POs; thus, an additional PO is created by the RPC claims team, for the Claimant to submit a claim or "Invoice".*

Therefore, a Claimant may be required to submit multiple invoices to receive the full reimbursement amount, if approved.

⚠️ *Points of contact responsible for multiple Claimants should scroll over to the right of the "Invoices" tab under the "Select Customer" field and select the Claimant they wish to submit a claim for based upon the applicable PO (Figure 18 on the next page).*

FIGURE 18 FILERS WITH MULTIPLE CLAIMANTS
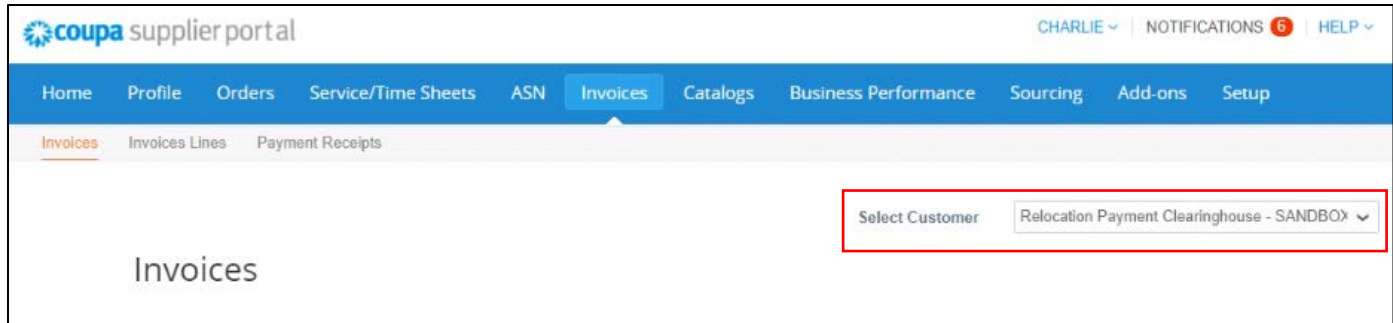
3. To prepare a claim for reimbursement, populate the following fields (Figure 19 below):
    *   **Claim Number:** Represents the number you create to assign to the claim.
    *   **Claim Date:** Represents the date of submission of the claim.
    *   **Attachments:** Upload supporting documentation, including proof of payment. A full list can be found in the RPC Handbook located at www.cbandrpc.com/resources. Please note, this is a requirement. If documentation is missing, the RPC will reach out to obtain the required information. If a website is being used to store supporting documentation, please include the URL.
    *   **Certification:** Check the box to acknowledge the certification statement.

⚠️ *Claims that do not contain the appropriate documentation prescribed above are at risk of being rejected. Reach out to the RPC team via the comment field at the bottom of the page for any inquiries regarding your documentation supporting your claim.*

FIGURE 19 CLAIM FIELDS – GENERAL INFO AND CERTIFICATION STATEMENT

I Certify That:

1. I am authorized by executive management to submit claims on behalf of my organization and the information and documentation submitted in support of this request for reimbursement are true, complete, and accurate to the best of my knowledge and belief.

2. All documents containing confidential information (as defined in the RPC Confidentiality Policy available at www.www.CbandRPC.com/setup) have been marked "CONFIDENTIAL INFORMATION" on each page where it appears.

3. Any sensitive personally identifiable information has been redacted or removed from all documents submitted, including: SSN, TIN, passport number, bank account or CC number, access or security codes (further details available at www.CbandRPC.com/FAQ).

4. The kinds, quantities and costs associated with the labor, goods, and/or services for which reimbursement is sought as part of this request are consistent with the kinds, quantities and costs set forth in the Transition Plan and/or Cost Catalog.

5. If not in the Transition Plan and/or Cost Catalog, a written justification has been included with this claim detailing the nature and type of costs incurred and the reasons these costs were necessary for C-band relocation.

6. The costs submitted for reimbursement as part of this request were necessary, reasonable, and actually incurred to implement C-band relocation.

7. To the extent applicable, internal control policies and procedures were followed when preparing cost estimates and incurring and paying reimbursable relocation costs.

8. All goods and/or services (including internal labor) for which reimbursement is claimed have been performed/received.

9. Payment, reflective of applicable credits, purchase allowances, and supplier/vendor discounts related to this and all prior claims, has been made as reflected in the supporting documentation.

10. This is my electronic signature.

*I acknowledge above ☐

4. Please review and verify the following pre-populated fields in Figure 20 for each line:
- **Description**: Based upon the Claim Summary provided by Claimant and FCC Cost Catalog.
- **Quantity:** Based upon the Claim Summary provide by Claimant (the quantity may be adjusted based on the actual claim being submitted).
- **Price:** Based upon the Claim Summary provide by Claimant (the price may be adjusted based on the actual claim being submitted).
- **Billing**: Cost Catalog Number and ESO information, if applicable.

Please Note: If you believe any of these pre-populated fields is incorrect, please reach out to the RPC via the comment field at the bottom of the page or via RPC Service Desk by telephone (301)-463-4676 or Info@CbandRPC.com.

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Please contact the RPC Service Desk via info@CbandRPC.com or 301-463-4676 with any questions regarding claim submission within the Coupa Portal.

FIGURE 20 CLAIM FIELDS – LINES

5. Complete the following fields shown in Figure 21 below:
   - **Vendor Name:** Based upon an internal invoice or a third-party invoice name.
   - **Vendor Invoice No:** Based upon an internal invoice or a third-party invoice number.
   - **Vendor Invoice Date:** Based upon an internal invoice or a third-party invoice date.
   - **Hard or Soft Cost**: Represents hard or soft costs as defined in the RPC Handbook located at www.cbandrpc.com/resources.
   - **Number of IRDs (if Applicable):** Enter the number of Integrated Receiver Decoders (IRDs).

⚠️ ***POs contain a breakout by line per claim. Review and input of all lines is <u>required</u> to submit.***

FIGURE 21 CLAIM FIELDS – LINES: VENDOR INVOICE DETAILS

4. Submit Claim

Once all fields are completed and verified from the PO, scroll to the bottom of the screen and click on "Submit" (Figure 22 below).

| Delete | Cancel | Save as Draft | Calculate | **Submit** |
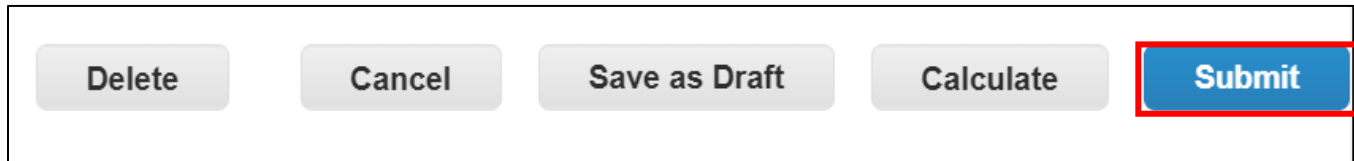
The options "Delete" and "Cancel" will not submit the claim to the RPC. The option to "Save as Draft" will save the claim in your profile but will not submit the claim to the RPC. The option to "Calculate" will recalculate if you changed any quantities or amounts but will not submit the claim to the RPC.

5. Reviewing the Claim Status

Upon submission, the claim will auto-route within Coupa to the RPC team to begin the review process. To check the status of a claim, select the Invoices tab from the Coupa home page, then select the "Invoices" sub-tab. If a point of contact is responsible for multiple Claimants, they should select the Claimant's name from the "Select Customer" drop down menu located at the top right corner to view the status of each of their Claimant profiles.

While under review, the claim will remain in a "Pending Approval" status as shown in Figure 23 located under the Invoices tab (previously discussed in Step 1 above.) until the RPC team makes its assessment.
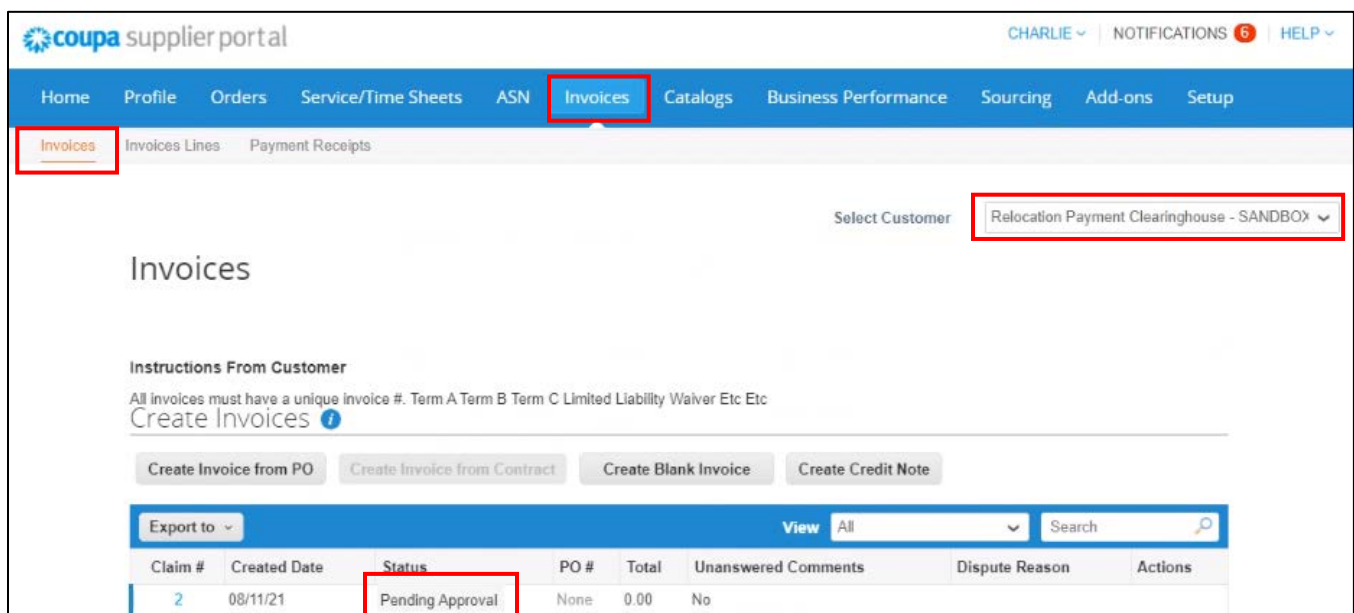
The RPC team will add comment(s) within your claim apprising you of the claim status once it completes its review. Further, a tentative "final approval" timeframe will be noted. **Note:** Following the approval of a claim, and within 30 days of submission of notice of approval by Invoice to Overlay Licensees, the RPC will issue a wire payment, provided that funding is available, and the claim is not subject to a dispute.

Once an assessment has been made, claims will either be placed in 'Approved' (Figure 24A on the next page) or 'Disputed' status (Figure 24B on the next page). "Approved" means that the RPC has reviewed the claim as submitted and it will be processed for payment. The RPC will provide a comment within the invoice noting an estimated date of payment of the lump sum claim.

"Disputed" means that the RPC has identified a discrepancy or needs additional information to complete its review of the claim. A summary of the reason for the dispute will be shown within the Invoice Dashboard. **The "Disputed" status does not infer that the claim has entered the formal dispute resolution process.**

Once in the "Disputed" status, the Claimant may correct or void the claim.

FIGURE 24A INVOICE DASHBOARD – CLAIM STATUS (APPROVED)

FIGURE 24B INVOICE DASHBOARD – CLAIM STATUS (DISPUTED)

6. Communications

The Comment box can be used for communications between the RPC team and the Claimant regarding the claim (Figure 25 below).

FIGURE 25 COMMENTS BOX

If you have any discrepancies or questions concerning your claim based upon the PO created or invoice submission, if you need any assistance with submitting your claim, or the overall status of your claim, please contact our Service Desk at 301-463-4676.