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RELOCATION PAYMENT  
CLEARINGHOUSE

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# LUMP SUM CLAIM SUBMISSION USER GUIDE

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## 1. Purpose

All Lump Sum reimbursement claims to the Relocation Payment Clearinghouse (“RPC”) must be submitted 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 lump sum filers (“Claimants”) whose election was accepted by the Federal Communications Commission (“FCC”) and whose Claimant Profile has been approved via the Coupa Portal with guidance on how to request reimbursement of accepted lump sum elections (“claim” or “invoice”) within the Coupa Portal.

For any questions regarding the Coupa claim submission, please contact the RPC Service Desk via [info@CbandRPC.com](mailto: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 lump sum payments are submitted by utilizing an “invoice” within Coupa. The **User Guides** prepared by the RPC will 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<sup>1</sup> (para. 277).

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<sup>1</sup> *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).

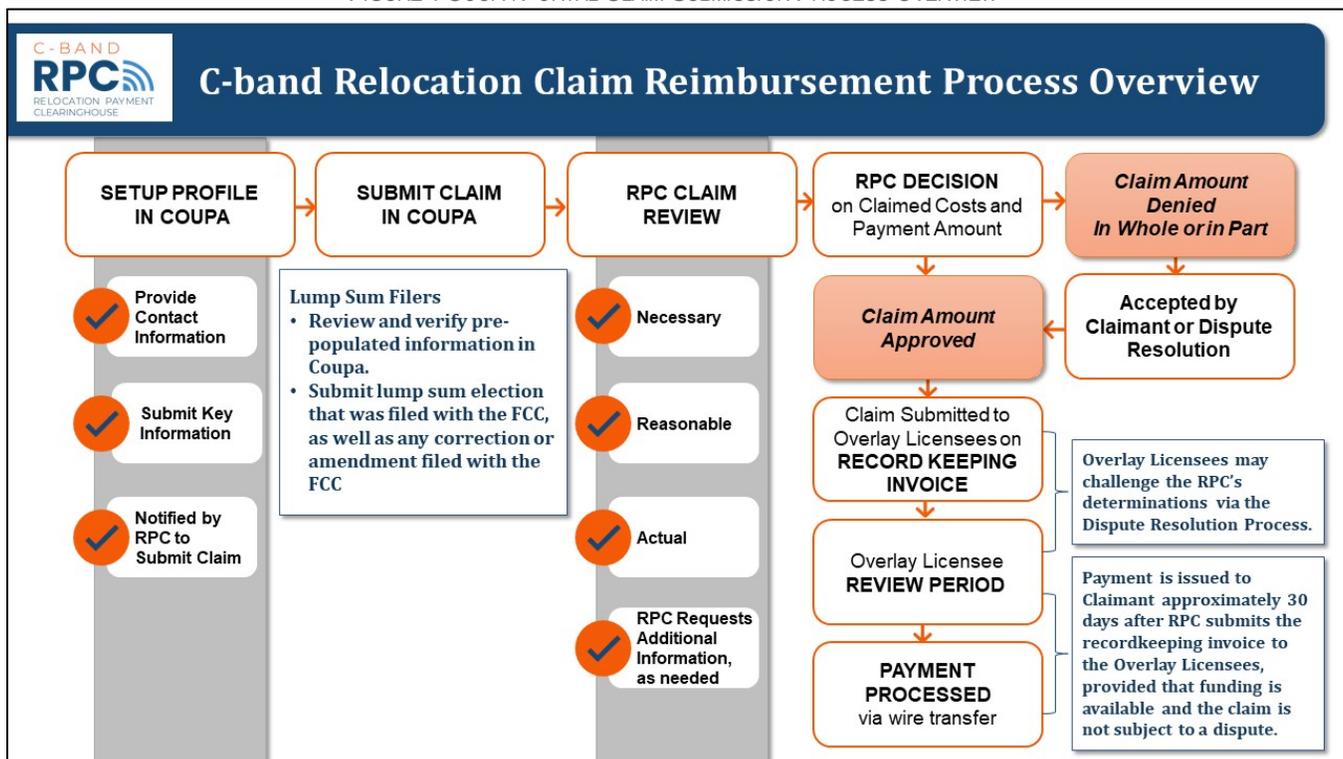
### 3. Coupa Portal Claim Submission Process for Lump Sum Filers

Prior to submitting a claim for lump sum reimbursement, the Earth Station Operator’s (“ESO”) profile must be submitted and approved by the RPC. Please see [www.CbandRPC.com/setup](http://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](http://www.CbandRPC.com/resources) provides information regarding the eligibility for lump sum reimbursement.

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

FIGURE 1 COUPA PORTAL CLAIM SUBMISSION PROCESS OVERVIEW



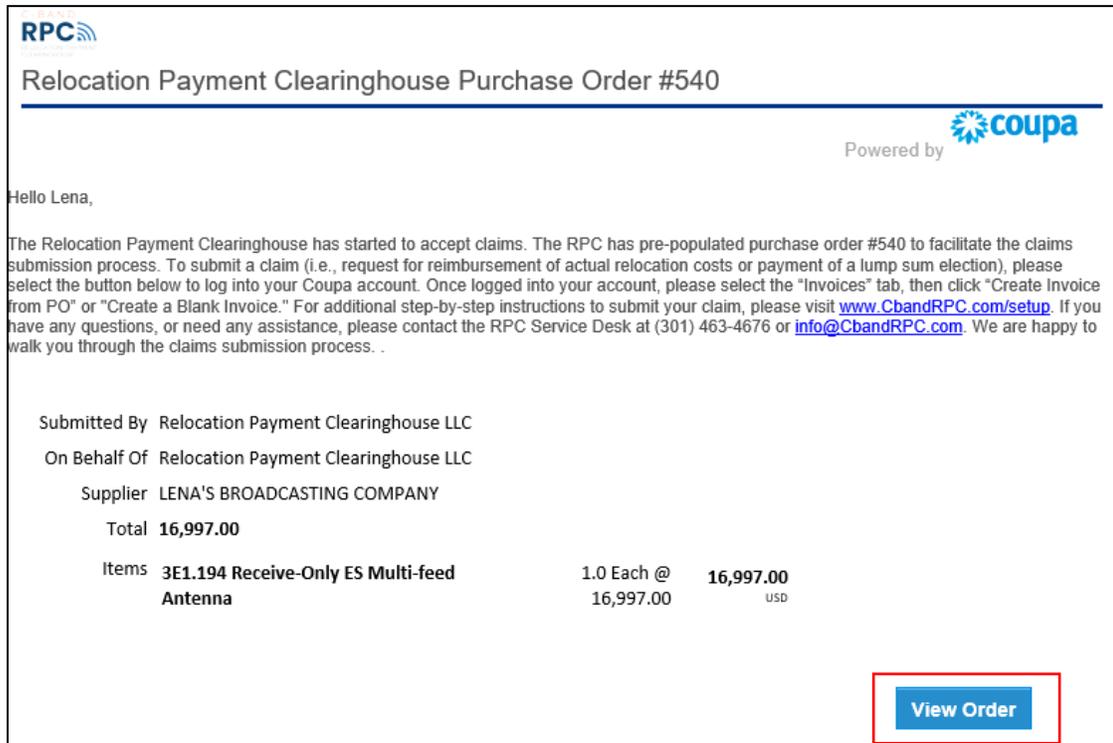
#### 3.1. Notification to Begin Claims Submission Process

Once the RPC approves a lump sum filer’s Coupa profile, the RPC prepares a Purchase Order (“PO”) based upon the Lump Sum Election Letter to facilitate the claims submission process. The PO allows Claimants to more easily confirm that the claim amount ties to the Lump Sum Election Letter and submit a claim. Lump Claims cannot be established until the RPC prepares the PO.

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 “purchase order” described above.

Upon receipt of the email shown in Figure 2 below, click **'View Order'** and perform the following steps to submit a claim:

FIGURE 2 COUPA EMAIL NOTIFICATION

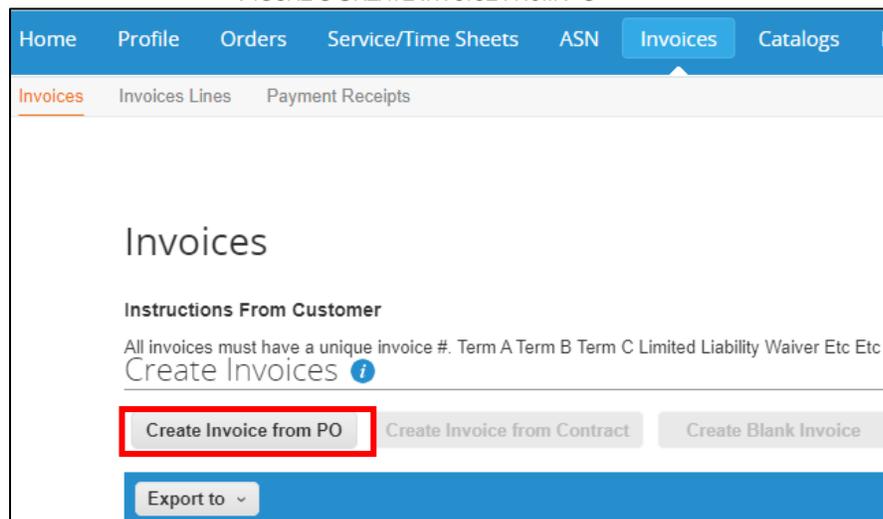


### 3.2. Initiate the Claim (Invoice)

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)
2. Click "Create Invoice from PO".

FIGURE 3 CREATE INVOICE FROM PO



3. Click the PO number that was issued for your claim. This will be identified in the email notification shown in Figure 2 above.
4. Scroll to the bottom of the “Invoice” page and click “Create Invoice”.

FIGURE 4 PO PAGE – CREATE INVOICE

Purchase Orders

Click the Action to Invoice from a Purchase Order

Export to  View All  Search

PO Number	Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
265	8/09/21	Issued	None	1 Each of Receive-Only ES Multi-feed Antenna	No	16,997.00		

Create Invoice Request Change Save Print View

**⚠ Claimants may have more than one PO based upon the data provided within the respective Lump Sum Election letter(s). 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 payment of the full lump sum amount.**

**⚠ If a point of contact is responsible for multiple Claimants they 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 5).**

FIGURE 5 FILERS WITH MULTIPLE CLAIMANTS

coupa supplier portal CHARLIE NOTIFICATIONS 6 HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts

Select Customer Relocation Payment Clearinghouse - SANDBOX

Invoices

### 3.3.Prepare Lump Sum Claim

1. To prepare a claim for lump sum payment, populate the following fields (Figure 6 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 the current Lump Sum Election Letter **and** any Erratum/Amendments filed with the FCC, FCC Orders addressing your Lump Sum Election (if applicable), **or** any other files/website links to support your Lump Sum Claim. Lump Sum Election Letter(s) and authorized attachments are required for submitting a claim.
  - **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 6 CLAIM FIELDS – GENERAL INFO AND CERTIFICATION STATEMENT

<p>I Certify That:</p>	
<p>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.</p> <p>2. All documents containing confidential information (as defined in the RPC Confidentiality Policy available at <a href="http://www.CbandRPC.com/setup">www.CbandRPC.com/setup</a>) have been marked "CONFIDENTIAL INFORMATION" on each page where it appears.</p> <p>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 <a href="http://www.CbandRPC.com/FAQ">www.CbandRPC.com/FAQ</a>).</p> <p>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.</p>	<p>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.</p> <p>6. The costs submitted for reimbursement as part of this request were necessary, reasonable, and actually incurred to implement C-band relocation.</p> <p>7. To the extent applicable, internal control policies and procedures were followed when preparing cost estimates and incurring and paying reimbursable relocation costs.</p> <p>8. All goods and/or services (including internal labor) for which reimbursement is claimed have been performed/received.</p> <p>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.</p> <p>10. This is my electronic signature.</p>
<p>* I acknowledge above <input type="checkbox"/></p>	

2. Please review and verify the following pre-populated fields in Figure 7 (found on the next page) for each line:
  - **Description** - based upon the Lump Sum Election Letter(s) and FCC Cost Catalog
  - **Quantity** - based upon the Lump Sum Election Letter(s)
  - **Price** - based upon the Lump Sum Election Letter(s) and FCC Cost Catalog
  - **Billing** – driven from the Cost Catalog number and ESO information if applicable

*Please Note: If you believe any of these pre-populated fields are incorrect, please reach out to the RPC.*

FIGURE 7 CLAIM FIELDS – LINES

3. Complete the following fields on Figure 8 below:
  - **Third party Vendor Name** – Enter “Lump Sum”
  - **Third party Vendor Invoice No** – Enter “Lump Sum”
  - **Third party Vendor Invoice Date** – Enter the date you are submitting the claim
  - **Number of IRDs (if Applicable)** – Enter the number of Integrated Receiver Decoder (IRDs)
  - **Hard or Soft Cost** – Select “Lump Sum” from the drop-down menu

*Please note: “Proof of Payment Reference” field does not require input for Lump Sum claims; therefore, this field should remain ‘blank’.*

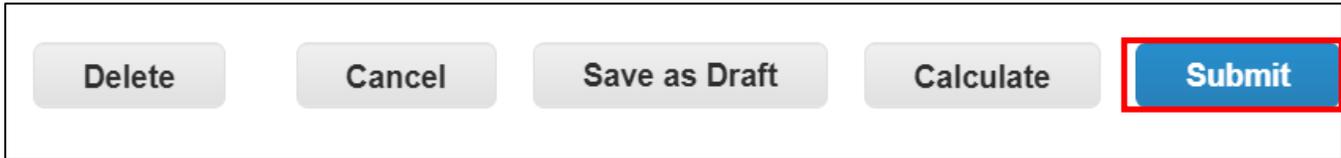
FIGURE 8 CLAIM FIELDS – LINES: VENDOR INVOICE DETAILS

**⚠ POs contain a breakout of each antenna by line per claim. Review and input of all lines is required to submit.**

### 3.4. Submit the Claim

Once all of the fields are completed and verified from the PO, scroll to the bottom of the claim screen and click on “Submit” (Figure 9).

FIGURE 9 SUBMIT



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

### 4. 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 the 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” dropdown menu located at the top right corner to view the status of each of its Claimant profiles.

While under review, the claim will remain in a “Pending Approval” status as shown in Figure 10 located under the Invoices tab (previously discussed in Step 1 above) until the RPC team makes their assessment.

FIGURE 10 INVOICE DASHBOARD – CLAIM STATUS (PENDING APPROVAL)

The screenshot shows the 'coupa supplier portal' interface. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices' (highlighted with a red box), 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. Below the navigation bar, there are sub-links for 'Invoices' (highlighted with a red box), 'Invoices Lines', and 'Payment Receipts'. A 'Select Customer' dropdown menu is set to 'Relocation Payment Clearinghouse - SANDBOX' (highlighted with a red box). The main heading is 'Invoices'. Underneath, there are 'Instructions From Customer' and a 'Create Invoices' button. Below that are buttons for 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. A table with columns 'Claim #', 'Created Date', 'Status', 'PO #', 'Total', 'Unanswered Comments', 'Dispute Reason', and 'Actions' is shown. The first row has a claim number of 2, a date of 08/11/21, and a status of 'Pending Approval' (highlighted with a red box).

The RPC team will add comment(s) within your claim apprising you of the claim status once it reaches completion of 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’ or ‘Disputed’ status (Figure 11).

FIGURE 11A INVOICE DASHBOARD – CLAIM STATUS (APPROVED)

This screenshot is similar to Figure 11A but shows a claim with a status of 'Approved' (highlighted with a red box). The table row for claim # 265 shows a date of 08/11/21, a status of 'Approved', a PO # of None, a total of 0.00, and 'Yes' under 'Unanswered Comments'.

FIGURE 11B INVOICE DASHBOARD – CLAIM STATUS (DISPUTED)

This screenshot shows a claim with a status of 'Disputed' (highlighted with a red box) and a 'Dispute Reason' of 'Other' (highlighted with a red box). The table row for claim # 265 shows a date of 08/11/21, a status of 'Disputed', a PO # of None, a total of 0.00, and 'Yes' under 'Unanswered Comments'.

“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 Coupa 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.

## 5. Communications

The Comment box can be used for communications between the RPC team and the Claimant regarding the claim (Figure 12).

FIGURE 12 COMMENTS BOX



The screenshot shows a web interface for a comments box. At the top left, there is a speech bubble icon with the number '0' inside, followed by the text 'Comments'. To the right of this header is a small downward-pointing chevron icon. Below the header is a large, empty text input field with the placeholder text 'Enter Comment' in a light blue font. The entire interface is enclosed in a thin black border.

If you have any discrepancies or questions concerning your claim based upon the PO created, 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.