USER GUIDE:
Submitting a Letter of Agency (LOA) or Letter of Exemption (LOE)

Step 1: Log in
Log into My Portal with your user ID (email address) and password.

Step 2: Select “Consortium Project Coordinator”
From the list provided, select “Consortium Project Coordinator – Healthcare Connect Fund.”
Step 3: Select Consortium HCP Number

After selecting the option for “Consortium Project Coordinator,” you will be directed to a page listing the consortium HCPs under the “My Consortia” tab. Select a consortium HCP number to add member HCPs to that consortium.

Step 4: Upload LOA or LOE Document

Select the “My LOAs” tab and then click on the “Add LOA” button to upload LOAs or LOEs.
A “Letter of Agency (LOA) Upload” pop-up box will appear where an applicant can upload a scanned copy of the LOA or LOE signed paper document and provide details about the authorizations that are associated with the member HCP sites. To learn more about consortium authorizations, visit the Authorizations web page.

**Step 4a: Upload an LOA**

To submit a Letter of Agency (LOA), select the “Yes” radio button next to “LOA Required?” and then click the “Upload” button to upload a scanned copy of the signed paper document. To learn more, visit the Letter of Agency web page.

Complete the LOA upload screen:

- For the “Certifications” drop down menu:
  - Select “Option 1” if there is no existing formal agreement, and the consortium leader will assume sole legal and financial responsibility for the activities of the consortium.
  - Select “Option 2” if the consortium has a formal written agreement, approved by USAC, allocating legal and financial responsibility to the consortium leader.

- The “Assignment” radio buttons refer to whether or not the consortium leader is permitted to assign a new consortium leader.
  - If the “Yes” radio button is selected, the applicant must enter a number in the “Notice (Days)” field. This identifies the number of days in advance a consortium leader must notify the member HCPs if the consortium leader is changing.

- Enter in the effective date and expiration date for the LOA.

When completed, select the “Submit LOA” button.
Step 4b: Upload an LOE

To submit a Letter of Exemption (LOE), select the “No” radio button next to “LOA Required?” and click the “Upload” button to upload a scanned copy of the signed paper document. To learn more, visit the Letter of Exemption web page.

For the “LOA Exemption” drop down menu, choose the exemption reason. When completed, select the “Submit LOA” button.

After the LOA or LOE has been submitted, a prompt will appear to confirm the submission was successful, and provide the LOA ID. Click “OK” to return to the “My LOAs” tab.
Step 5: Add Member HCPs to LOA

In this step, you will identify the member HCPs that are associated with this LOA. Select the “Add HCPs to LOA” button.

Build the list of member HCPs to be added to this LOA by using the search function. You can type in multiple search criteria in any of the three fields for HCP name, HCP number, or ZIP code to search. To add an HCP, click the “Add” link in the “Add HCP” column.
Once an HCP has been added, the “Add” link will change to “Unselect.” Click the “Unselect” link if you wish to remove the HCP from the list.

Use the “Reset” button to continue searching for HCPs. Once you have added each of the member HCPs associated with the LOA, click the “Add HCPs to LOA” button to connect the member HCPs to the LOA.

The “My LOAs” tab will now show each of the member HCPs that have been added to the LOA. To delete a member HCP from the LOA, click the “Remove” link on the right column. To add additional member HCPs to the LOA, click the “Add HCPs to LOA” button again.
Step 6: Submit the LOA

Once the list of HCPs is complete and accurate, click the “Submit LOA” button.

If an FCC Form 460 has not been submitted to USAC for review for an HCP, the “Submit LOA” button will be grayed out, and a hover-over error will appear that says, “Missing member 460 for HCP: XXXXX.” Applicants will need to file a new FCC Form 460 for a member site that needs to be added to the LOA in order to attach that HCP to the LOA, using the “File Member Form 460” button.
After submitting an FCC Form 460 for each HCP, you will need to select the consortium HCP number and then the “My LOAs” tab to return to this screen and repeat the process to submit additional LOAs/LOEs.

Once each of the HCPs has an FCC Form 460 that is either approved or submitted to USAC, the applicant will be able to submit the LOA by clicking the “Submit LOA” button.

**Step 7: Confirm Successful Submission**

Select the “My Consortium” tab. The “HCPs to be added to Consortium” list will display each of the member HCPs that are linked to the LOA/LOE that is under USAC review. In addition, the Project Coordinator will receive an email notification that the LOA/LOE was submitted successfully.