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

Consortium leaders are required to submit either an LOA or LOE for each membersite of their consortium. The LOA and LOE authorize the consortium leader to submit forms on their behalf. Visit the Authorizations page to learn more.

Step 1: Log in
Log into My Portal with your Username (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.
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 about what needs to be included in your LOA, visit the Letter of Agency web page.

![Upload LOA Screen]

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 about what needs to be included in your LOE, 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 or LOE

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

Build the list of member HCPs to be added to this LOA/LOE 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. You can add multiple HCPs at one time.

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.
Step 6: Submit the LOA or LOE

Once the list of HCPs is complete and accurate, click the “Submit LOA” button.
Step 7: Confirm Successful Submission

Once the LOA/LOE has been successfully submitted, the LOA ID status bar will display “Submitted”. In addition, the Project Coordinator will receive an email notification that the LOA/LOE was submitted successfully.