How to Submit a Site and Service Substitution in My Portal

An applicant may submit a Site and Service Substitution after a funding commitment has been issued as long as it is allowed in the RFP and related contract(s).

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 submit a Site and Service Substitution.

Step 4: Select “Forms” Tab

Select the “Forms” tab to view the different forms.
Step 5: Select “Form 462” tab
Select the “Form 462” tab to view FRNs associated with the selected Consortium HCP.

Step 6: Select the “Substitution” button
Click the “Substitution” button to view approved FCC Forms 462 and submit Site and Service Substitutions.
Step 7: Select an FRN

Find and select the FRN for which you would like to perform a substitution.

This screen shows all of the approved FCC Forms 462 for the consortium. The “Commitment Amount” column shows the total funding amount committed to this FRN, and the “Funds Remaining” column shows the funds that have not been invoiced.

Note: When the “Substitution Status” column shows “Received,” you will not be able to select that particular FRN or add it to an invoicing FCC Form 463 until the substitution is approved or denied.

Step 8: Add the expense items

The “FRN Search” tab displays all of the expense items from the approved Network Cost Worksheet (NCW). If your NCW has more than 25 expense items, you will have to select the “Next” and “Previous” buttons to navigate between expense item pages.

Select the “Add” button next to the expense items that you want to include on the substitution. Once you select the “Add” button, those expense items will be marked as “Added.”

Once you have added the expense items that are involved in the substitution, click “Save and Continue.”

Note: You will not be able to submit a substitution request if the expense item is included on an FCC Form 463 that is in draft status, with the service provider for review, or under USAC review. In addition, you cannot perform a substitution on an expense item where the full funding amount has already been disbursed. These items will be marked as “N/A.”
Step 9: Increase/Reduce Expenses or Add/Remove Sites

The “Expense Items” tab displays the values from the latest approved FCC Form 462. You can navigate between expense items by using the “Next” and “Previous” buttons.

The blank fields indicated in the screenshot above are able to be modified to insert new values. If you need to modify a line that does not have a blank field, e.g. the bandwidth or the HCP number, you will need to reduce the expense and add the line item as a new expense.

The “Add Expense” button can be found at the top or at the bottom of the expense page.
The “Reduce Expense” button can be found at the bottom of the expense page.

![Image of Reduce Expense button](image)

**Note:** The “Reduce Expense” button can also be used when a service has been terminated and you would like to remove the funds from that line item and add it to the discretionary bucket.

The “Remove Expense” button can be found at the top or at the bottom of the expense page. Removing an expense will not reduce the funding from this expense item. This button simply allows you to delete this expense item from the substitution request.

![Image of Remove Expense button](image)

**Financial Information Calculators**

In the “Financial Information” section, there are two calculators: The FRN calculator and the Expense calculator.

**FRN Calculator:**

<table>
<thead>
<tr>
<th>FRN Calculator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Committed:</td>
<td>$35,999.98</td>
</tr>
<tr>
<td>Invoiced:</td>
<td>$5,999.96</td>
</tr>
<tr>
<td>Remaining:</td>
<td>$30,000.00</td>
</tr>
<tr>
<td>Available:</td>
<td>($0.00)</td>
</tr>
</tbody>
</table>

“Committed” shows the total amount of funding committed to the FRN, and this amount will not change. Substitutions cannot increase the total amount of funding committed.

“Invoiced” shows the total amount of the commitment that has already been invoiced and disbursed by USAC.

“Remaining” shows the difference between the “Committed” and “Invoiced,” and this number represents the funding for the FRN that is ready to be re-allocated.

“Available” will change based on the new values that you input in the “Financial Information” section. When you first begin the substitution, “Available” will be at 0.
Expense Calculator:

<table>
<thead>
<tr>
<th>Expense</th>
<th>Committed</th>
<th>Invoiced</th>
<th>Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$11,999.99</td>
<td>$0.00</td>
<td>$11,999.99</td>
</tr>
</tbody>
</table>

“Committed” shows the total amount of funding committed to this particular expense item.

“Invoiced” shows the total amount of money for this particular expense item that has already been invoiced and disbursed.

“Requested” represents the modified amount of funding being requested for this expense item, based on the changes you make in the Financial Information section. When you first begin the substitution, the “Requested” amount will be equal to the “Committed” amount.

**Note:** Please keep in mind that the numbers mentioned above reflect USAC’s 65% contribution.

Once you have made all the necessary changes to the expense item, click “Save and Continue.”

**Step 10: Upload Supporting Documentation**

Applicants are required to upload supporting documentation for Site and Service Substitution requests in the “Additional Documentation” tab. Generally, supporting documentation may include a contract, service order, an addendum, correspondence with a service provider, and/or a summary/explanation of request.

Select “New Document.”

Select the document type and “Click to Upload.”

**Note:** If the document type is not listed as an option, select “Other” and manually enter the document type in the blank field.
Once the document(s) have been uploaded, click “Save and Continue.”

**Step 11: Certifications**

On the “Certifications” tab, read and check the certifications in Lines 32-40, then click “Save and Continue”.

**Step 12: Sign and Certify**

Click “Certify” to certify and submit the form using your My Portal password as your signature.
Step 13: Confirm Successful Submission

Once the substitution has been successfully submitted, it will be listed under the “Substitution” section of My Portal, referred to in Steps 6-7, with a status of “Received.” You will receive an email notification that the substitution was submitted.

Once the substitution has been reviewed, the status will change to approved or denied. If approved, you will receive an email notification.