



Review ezFedGrants Access Request

Job Aid



Purpose

This document describes how users with the Grants Administrative Officer role review ezFedGrants access requests from other users in their organization.

Key Terms

- **External User:** An individual who interacts with USDA agencies or offices on behalf of an organization. External users may also be referred to as recipients, applicants, cooperators, or agency customers.
- **Organization:** Any of a number of institutions, such as colleges, universities, non-profits, tribal organizations, state governments, or otherwise, that engage with the Federal Government through grants or other types of agreements.
- **Organization ID:** Organization IDs, such as Unique Entity ID (UEI), are used to indicate the specific legal entities that are recipients of Federal grants/agreements. Each organization has at least one unique organization ID. Large or multifaceted organizations may have multiple IDs under a larger institutional umbrella (such as separate departments or campuses of a single university).

You Will Need

- An eAuthentication Account
- The Grants Administrative Officer (GAO) role in ezFedGrants
- An access request awaiting your review

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Data Note

The screenshots provided with these instructions are a representative sample for the purpose of training, which contain sample data and may not depict the entire screen.

In addition, these instructions focus on the **minimum system requirements** for the above-described procedure(s). You may need to complete additional fields or provide additional information not specifically described in this document.

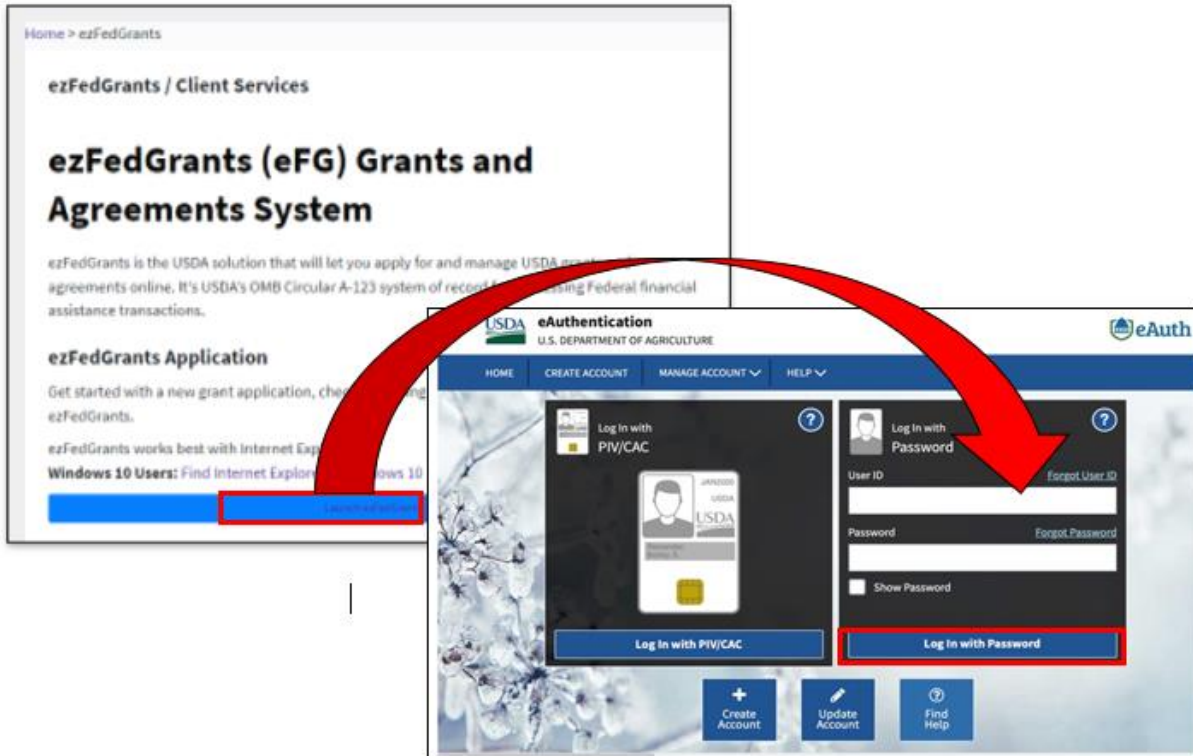
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Getting Started

1. Launch the ezFedGrants External Portal (from the [OCFO ezFedGrants website](#)) and log in with your eAuthentication Account.

Note: For questions regarding ezFedGrants access, including logging-in and eAuthentication, please review the [ezFedGrants FAQs general](#).



2. Locate the access request you want to review in the **Actionable Items** section of the **ezFedGrants External Portal Home** screen. Click the **Transaction ID** link to open the access request work item.

Note: If you have a lot of work items, use the **Category** field to filter your work items.

The image shows the 'Home' screen of the ezFedGrants External Portal. The 'Actionable Items' section is visible, featuring a table of work items. The first row of the table has the Transaction ID 'RA-3096' highlighted with a red box.

Transaction ID	Transaction	FAIN	Status	Due Date	Last Updated
RA-3096	Request Access		Submitted		9/6/19
CLM-2559	Claim	FX170200-10.C007	Draft		9/6/19
NR17NRCSCENTC023-PE-Q2-19	Performance Report	NR17NRCSCENTC023	Draft Pending Signature	10/4/19	9/6/19
NR17NRCSCENTC021-PE-Q2-19	Performance Report	NR17NRCSCENTC021	Not started	10/4/19	9/6/19
AM17AMAXXXXG002-PE-SA2-2016	Performance Report	AM17AMAXXXXG002	Not started	12/28/16	9/6/19
APP-5565	Application		Draft		9/6/19



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Review the Request

1. On the **Request Access** screen, review the information on the **Role Selection**, **Organization**, and **Personal Information** tabs.

Ensure that the user has selected a valid organization and that there are no obvious typos in the user's personal information.

The screenshot shows the 'Request Access (RA-3096)' screen with a status of 'Submitted'. At the top right are 'Print' and 'Close' buttons. Below the title bar is a dropdown menu labeled 'Please Select An Option'. Below this are three tabs: 'Role Selection' (which is selected and highlighted with a red box), 'Organization', and 'Personal Information'. Under the 'Role Selection' tab, the 'User Role' is listed as 'Signatory Official'. Below that is a section for 'Access Request Comments' with the text 'Why are you submitting this access request?' and the response 'I am the SO.'

2. Select either **Reject** or **Accept** from the **Please Select An Option** dropdown menu. Additional fields will appear based on your selection.

If you selected **Accept**, complete the additional steps explained in the **Accepting a Request** section of this document (pages 4-6).

If you selected **Reject**, proceed to the **Finalize Decision** section of this document (page 7).

This screenshot is similar to the previous one but shows the 'Please Select An Option' dropdown menu open. The 'Accept' and 'Reject' options are visible and highlighted with a red box. The 'Role Selection' tab remains selected.



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Accepting a Request

1. If needed, you can change the user's assigned role using the **Role Selection** field; however, users' roles can also be changed at any time through the **Manage Permissions** tile on the left-side navigation menu. Please refer to the **ezFedGrants Role and Access Management Job Aid** for more information.

The screenshot shows a form titled "Accept" with a "Submit" button. Below the title is an "Acceptance Comments" text area. The "Role Selection" section includes a "User Role" dropdown menu with "Signatory Official" selected. A red box highlights the "Role Selection" section. Below it is the "Contact Details" section with a "Find Contact" button and a note: "Please search for the contact information of the user requesting access."

2. In the next few steps, you will check if the user already has a Contact Record in the ezFedGrants System. If an individual has been involved with a USDA agreement in the past, they may have a Contact Record, even if they have never before had External Portal access.

You must at least search for a record, but you do not have to select a record.

To begin, scroll down to the **Contact Details** section and click the **Find Contact** button to open the **Find Contact** popup window.

This screenshot shows the "Acceptance Comments" section of the form. Below it is the "Role Selection" section with the "User Role" dropdown set to "Signatory Official". The "Contact Details" section is highlighted with a red box, showing the "Find Contact" button. Below this is a note: "Please search for the contact information of the user requesting access." followed by two bullet points: "Validate that the user is aligned with the correct organization. If the user has selected the wrong organization, reject the request." and "If the user is aligned with the correct organization, use the 'Find Contact' button to determine if the user already has a contact record in ezFedGrants. If no record exists, a contact will be created on approval." At the bottom, there are fields for "First Name", "Last Name", "City", and "State", all of which are currently set to "N/A".



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- In the **Find Contact** popup window, complete at least one **Search Criteria** field and click the **Search** button.

Note: To view all Contact Records for the organization (the broadest possible search), type a single asterisk (*) into the **First Name** or **Last Name** field and leave all other fields blank.

- Review the **Search Results** table to determine if any of the retrieved records are a match.

Selecting a record is not required. Only select a record if it is a match. Selecting a non-matching record will overwrite the details of the selected Contact Record, potentially interfering with Contact Records of other users in your organization.

Matching Record Found: Click the **Select Contact** link. This will connect the Contact Record with the user's External Portal access.

No Matching Record Found: Do not select a record. Click the **Close** button to exit the **Find Contact** popup window. A new Contact Record will automatically be created in the ezFedGrants System once you finalize your approval of the access request.

Note: The system will display a warning message if you select a record that does not match the first and last name of the individual who has submitted the access request.

Email Address				
<input type="text"/>				
CRM Business Partner ID				
<input type="text"/>				
<input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Close"/>				
Search Results				
	First Name	Last Name	Email Address	City
Select Contact	John	Doe	J.Doe@sample.edu	Washington
Select Contact	Zeta	Jones	Z.Jones@example.gov	Washington
Select Contact	Kline	Mann	K.Mann@test.com	Washington



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5. Double-check the **Contact Details** section of the **Request Access** screen to ensure it is correct:

If you selected a record: The fields will populate from the selected record. These details should generally match the equivalent details from the **Personal Information** tab of the access request (Scroll down the **Request Access** screen to see this tab).

If there was no matching record: All fields should be blank or display **N/A**.

If you selected the wrong record, click the **Clear Contact Selection** button to reset this section.

Contact Details

[Find Contact](#) [Clear Contact Selection](#)

Please search for the contact information of the user requesting access.

- Validate that the user is aligned with the correct organization. If the user has selected the wrong organization, reject the request.
- If the user is aligned with the correct organization, use the "Find Contact" button to determine if the user already has a contact record in ezFedGrants. If no record exists, a contact will be created on approval.

First Name TEST	Last Name ARS
City Washington	State DC
Phone (123) 456-7890	Email mbooker@rutgers.gov



Finalize Decision

1. Enter comments relevant to your decision into the **Acceptance/Rejection Comments** text box.

The screenshot shows a web form titled "Accept". At the top, there is a dropdown menu labeled "Please Select An Option" and a blue "Submit" button. Below this is a large text input field labeled "Acceptance Comments", which is highlighted with a red border. Underneath the text box is a "Role Selection" section with a red asterisk and the text "User Role". A dropdown menu below this is currently set to "Signatory Official".

2. Click the **Submit** button to finalize your decision.

The screenshot shows a confirmation form titled "Request Access (RA-3096)". The status is "Submitted". At the bottom, there is a dropdown menu labeled "Please Select An Option" and a blue "Submit" button, which is highlighted with a red border. Below the buttons is the word "Accept".

3. Upon successful submission, you will see a confirmation message.
If there are any issues, an error message will be displayed.

The screenshot shows the final confirmation page titled "Request Access (RA-3096)". The status is "Approved". In the top right corner, there are "Print" and "Close" buttons. A green message box contains the text: "Access Request RA-3096 has been approved." Below this is a tabbed interface with three tabs: "Role Selection" (selected), "Organization", and "Personal Information". Under the "Role Selection" tab, the "User Role" is listed as "Signatory Official".



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See Also

Job Aids

- ezFedGrants External Portal Onboarding and Basics Job Aid
- ezFedGrants External Portal User Roles Quick Reference
- ezFedGrants External Portal User Role Management Job Aid
- Working with Multiple Organizations in ezFedGrants Quick Reference
- Onboarding and Accessing ezFedGrants FAQs

ezFedGrants Hyperlinks

- [ezFedGrants Home page](#)
- [ezFedGrants FAQs general](#)

Need Help?

Contact the ezFedGrants Help Desk at ezFedGrants-cfo@usda.gov.

Version Control

Name	Date	Changes Made
Abael Solomon	April. 2022	Removed Broken Links
Abael Solomon	Jan. 2022	Updated OCFO Website link
April Murphy	May 2019	Initial document created