



Using ezFedGrants – The Basics

Job Aid



Before You Begin

This document provides general guidance on the appearance and basic functionality of the ezFedGrants External Portal.

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.
- **ezFedGrants:** A system for managing Federal awards. External users access the ezFedGrants External Portal to complete tasks such as viewing and applying to Federal funding opportunities, viewing and signing award documents, and submitting claims and progress reports, among other actions.
- **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.

You Will Need

- An eAuthentication Verified Identity Account

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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.

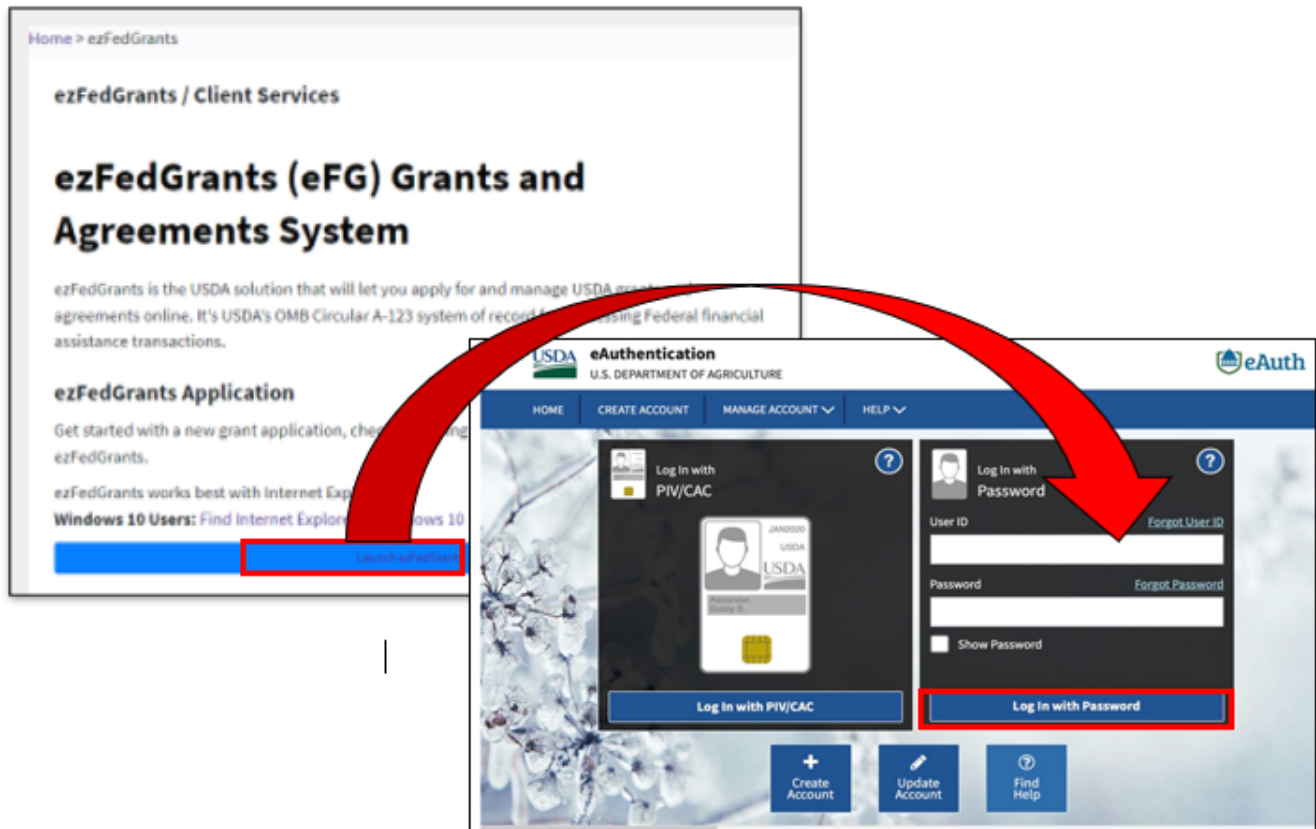
In addition, these instructions focus on the **minimum system requirements** for the above-described procedure(s). You may need to complete additional fields or provide additional information not specifically described in this document.

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Getting Started

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



For questions regarding ezFedGrants access, including logging-in and eAuthentication, please review the Onboarding and Accessing ezFedGrants FAQs located on the [OCFO ezFedGrants website](#).



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General Appearance

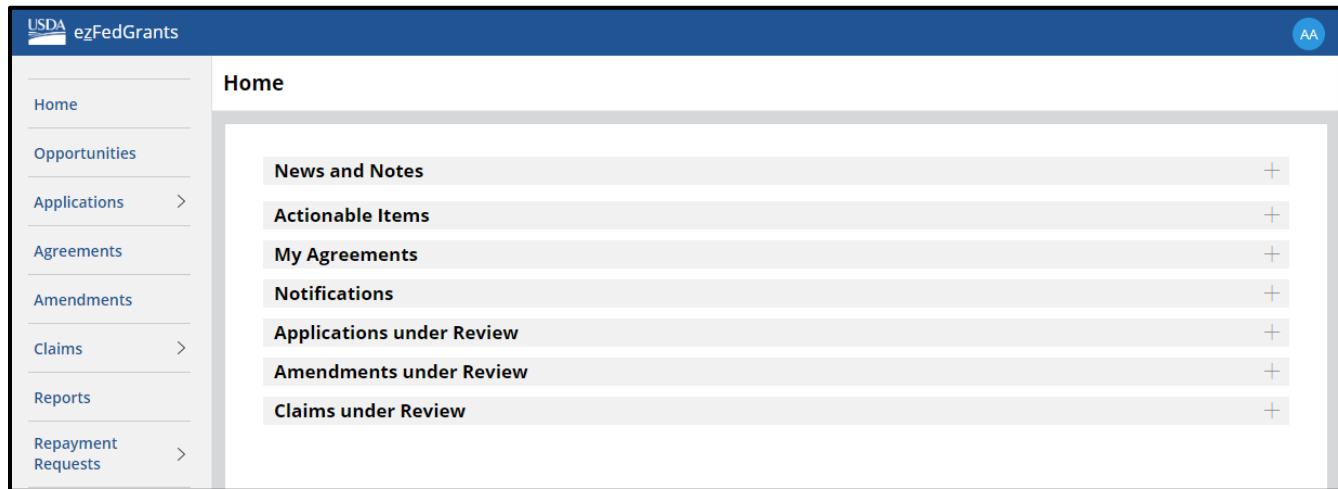
Visually, the ezFedGrants External Portal is divided into three major zones: the header, the navigation menu, and the active screen or “body”.

The **Header** is always visible across the top of the screen. It contains the **User Name** dropdown menu.

The **Navigation Menu** is always available on the left side of the screen. It contains **Navigation Tiles**.

The remainder of the screen is referred to as the **Active Screen** or **Body**. As the name suggests, the “active screen” is shown here. When you first log in to ezFedGrants, you will see the **Home** screen. When you click a link or button that opens a new screen or popup window, the new screen/window will appear in the **Body**.

The remainder of this document will discuss each of the three zones and the **Home** screen in more detail.



Differences in Appearance

You may not have access to all of the links and features described in this document.

The links and features available to you depend largely on your user role. For example, users with the **Signatory Official** role cannot create applications, so they will not see the **Create Application** link on the navigation menu. For more detail on the features available to each user role, please review the **ezFedGrants External Portal User Roles Quick Reference**.

Furthermore, when you are using ezFedGrants, you will only see award/agreement data relevant to the organization(s) you are affiliated with. Please refer to the **Working with Multiple Organizations in ezFedGrants Quick Reference** for more information about organizational affiliation. ezFedGrants may not contain historical agreement data. You may need to contact the awarding agency directly to access records created prior to the agency using ezFedGrants.

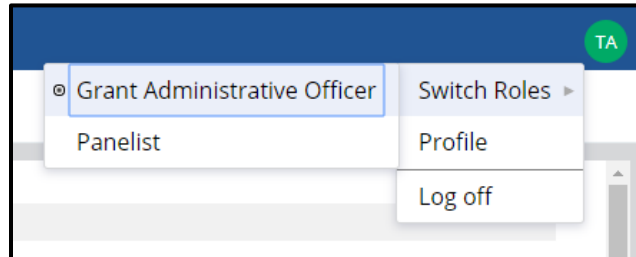
The Header

The header is always visible across the top of the screen. It contains the **User Name** menu.



Username Menu

Click your initials in the upper-right corner of the screen to see the **User Name** menu.



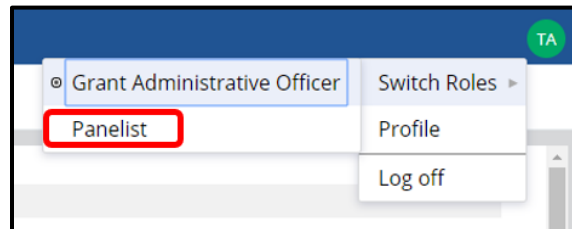
From this menu you can:

- View your primary user role (Grants Administrative Officer, Grants Processor, or Signatory Official)
- Switch active roles (if you have the **Panelist** role in addition to your primary user role)
- Open your user profile
- Log out of ezFedGrants

View & Switch Roles

If you have the **Panelist** role in addition to a primary user role, you must switch roles to access your panel-related tasks. By extension, you must switch back to your primary user role when you have finished your panel-related tasks.

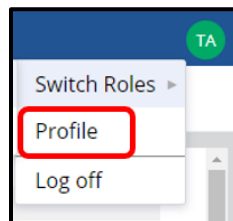
To switch roles, click your initials to open the **User Name** menu, then click **Switch Roles**, and then select the appropriate role from the sub-menu. Your active role is indicated by a small circle to the left of the active role. If you only have one role, you will only see one role on the sub-menu.



For more information about the **Panelist** role, please refer to the **ezFedGrants External Portal User Roles Quick Reference** and the **ezFedGrants User Profile Management Job Aid**.

Your User Profile

Click the **Profile** link to open the **User Profile** screen.



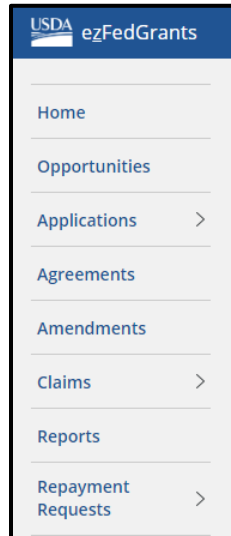
On the **User Profile** screen you can view and edit your personal details, toggle your preference for participation in application review panels (the **Panelist** role), view organizations you are affiliated with in ezFedGrants, and submit access requests for additional organizations. Please refer to the **Using ezFedGrants - Your User Profile Job Aid** and **Working with Multiple Organizations in ezFedGrants Quick Reference** for full details.

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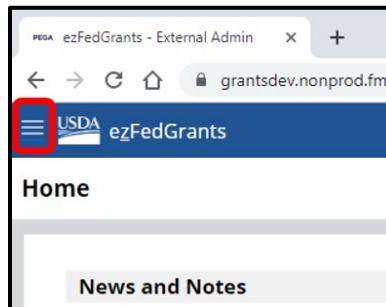
The Navigation Menu

The navigation menu is always available on the left side of the screen. It contains **Navigation Tiles**, which are used to access the various features and screens in ezFedGrants.



Hidden Menu

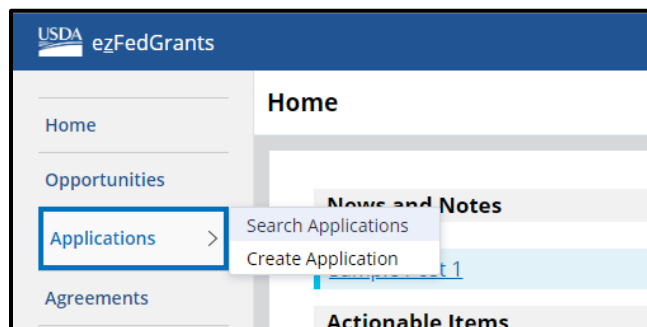
If your internet window is small or you are viewing ezFedGrants on a tablet or smart phone, the menu may be collapsed.



Click the **three bars** icon to display the menu. After selecting an option from the menu, click outside the menu to hide it if it does not automatically hide itself.

Navigation Tiles

When clicked, each navigation tile will either directly open the associated screen or display related links on a dropdown menu. If a dropdown menu is shown, click one of the links on the dropdown menu to open the associated screen.



The available navigation tiles and related links are determined by your user role.



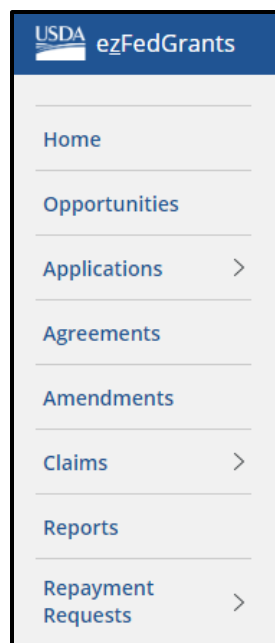
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Standard Tiles

Users with the Grants Administrative Officer (GAO), Grants Processor (GP), or Signatory Official (SO) role will have all of the following tiles:

- **Home:** Opens the **Home** screen.
- **Opportunities:** Used to search and view funding opportunities.
- **Applications:** This tile includes two related links:
 - **Search Applications:** Used to search, view, and edit (if possible) previously-created applications.
 - **Create Application:** Used to create a new application.
 - Because Signatory Officials cannot create applications, the **My Applications** tile will automatically open the **Search Applications** screen for these users.
- **Agreements:** Used to search and view agreements.
- **Amendments:** Used to search and view amendments.
- **Claims:** This tile includes two related links:
 - **Search Claims:** Used to search, view, and edit (if possible) previously-created reimbursement claims.
 - **Create Claim:** Used to create a new reimbursement claim. Advance payment claims cannot be submitted through the ezFedGrants External Portal.
 - Because Signatory Officials cannot create claims, the **My Claims** tile will automatically open the **Search Claims** screen for these users.
- **Reports:** Opens the **Search Reports** screen, which allows the you to view performance and financial reports for your organization's awards.
- **Repayment Requests:** This tile includes two related links:
 - **Search Repayment Requests:** Used to search, view, and edit (if possible) previously-created repayment requests.
 - **Create Repayment Request:** Used to create a new repayment request.
 - Because Signatory Officials cannot create repayment requests, the **My Repayment Requests** tile will automatically open the **Search Repayment Requests** screen for these users.
- **Contact USDA:** Use this tile to contact the ezFedGrants Help Desk.
- **Training/Guidance:** Opens the OCFO ezFedGrant website, which contains training materials and a schedule of upcoming training webinars.



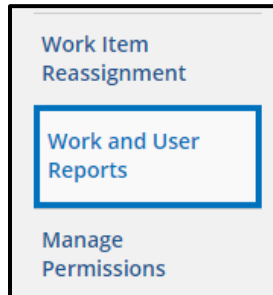
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GAO Tiles

In addition to the standard tiles, users with the GAO role will have the following additional tiles:

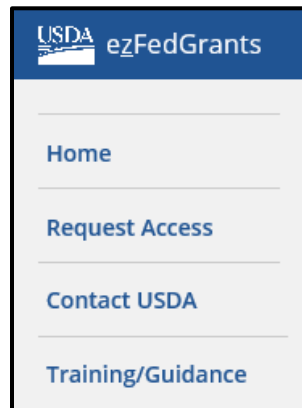
- **Work Item Reassignment:** Allows the GAO to reassign various work items. Refer to the **Reassigning Work Items in ezFedGrants Quick Reference** for more information.
- **Work and User Reports:** Allows the GAO to view user role and work item assignments at a high level. Refer to the **ezFedGrants Administrative Reports Job Aid** for more information.
- **Manage Permissions:** Allows the GAO to view and change primary user roles for users in their organization(s) and to deactivate access for users who no longer require ezFedGrants access.



No-Role Tiles

Users with no role will only have the following tiles:

- **Home:** Opens the **Home** screen for a user with no access (displays only a welcome message and instructs the user to submit an access request).
- **Request Access:** Opens the **Request Access** screen through which the user can submit a request for a primary role and select one or more organizations to be affiliated with.
- **Contact USDA:** Use this tile to contact the ezFedGrants Help Desk.
- **Training/Guidance:** Opens the OCFO ezFedGrant website, which contains training materials and a schedule of upcoming training webinars.



Panelist Tiles

If you have switched to the **Panelist** role, you will see the following tiles:

- **Home:** Opens the **Panelist Home** screen.
- **Panels:** View information for panels you are assigned to.





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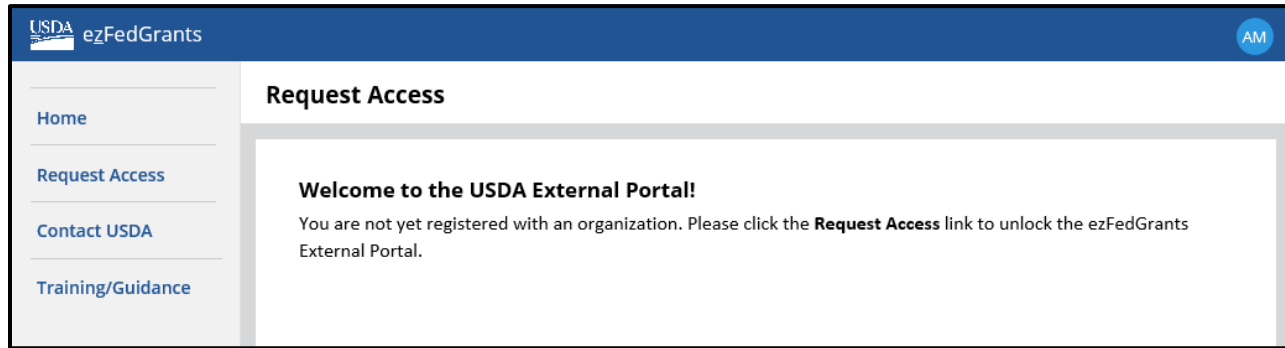


The Home Screen

You will see the **Home** screen when you first log in to ezFedGrants.

No-Role Home Screen

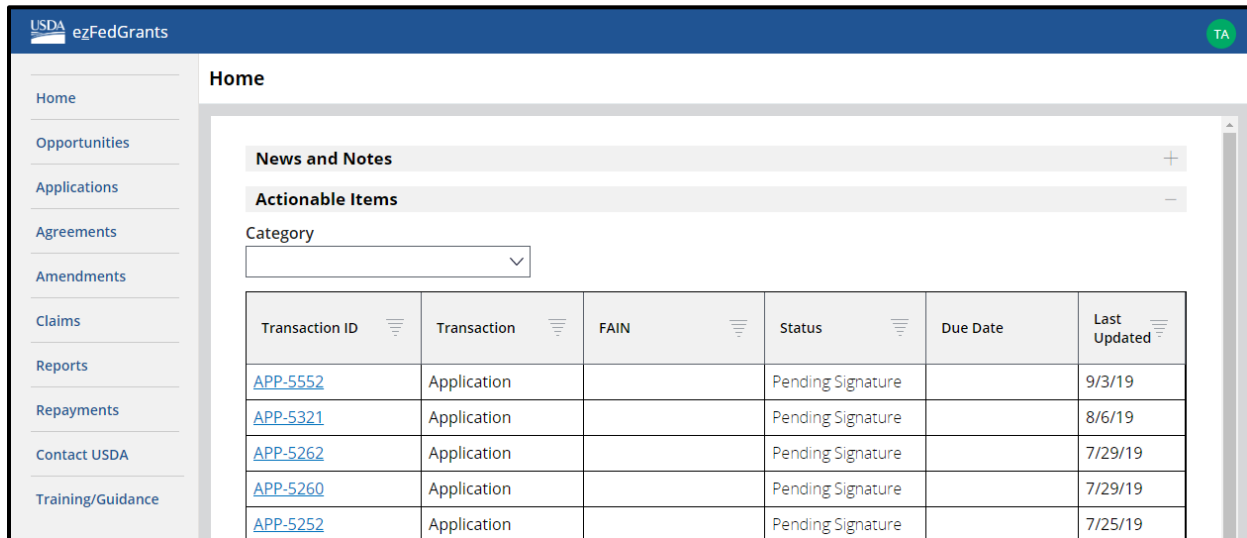
If you do not have a role, the **Home** screen will only contain a welcome message and instruct you to submit an access request.



Standard Home Screen

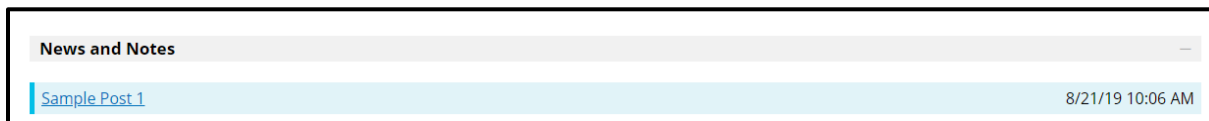
The standard **Home** screen is displayed for users with the Grants Administrative Officer (GAO), Grants Processor, or Signatory Official role. It is divided into the following seven sections:

- **News and Notes**
- **Actionable Items**
- **My Agreements**
- **Notifications**
- **Applications under Review**
- **Amendments under Review**
- **Claims under Review**



News and Notes

The **News and Notes** section of the **ezFedGrants External Portal Home** displays announcements about the ezFedGrants System. Click the announcement title to view the full text of the announcement.





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Actionable Items (Your Worklist)

The **Actionable Items** section contains your work items and pending tasks. Click an item ID to open and take action on it. You can use the **Category** field to filter your actionable items.

Actionable Items						
Category <input type="text"/>						
Transaction ID	Transaction	FAIN	Status	Due Date	Last Updated	
APP-5460	Application		Returned by Signatory Official		9/9/19	
AO172501X443G009-PE-Q2-19	Performance Report	AO172501X443G009	Not started	10/6/19	9/6/19	
AO172501X443G009-FI-Q2-19	Financial Report	AO172501X443G009	Not started	10/6/19	9/6/19	
AO172501X443C008-PE-Q2-19	Performance Report	AO172501X443C008	Not started	10/6/19	9/6/19	
AO172501X443C008-FI-Q2-19	Financial Report	AO172501X443C008	Not started	10/6/19	9/6/19	
NR17NRCSCENTC021-FI-Q2-19	Financial Report	NR17NRCSCENTC021	Draft Pending Signature	10/4/19	9/6/19	
-PE-Final-17	Performance Report		Returned by Certifying Official	2/27/18	9/6/19	
OA-GA-17-011-PE-SA1-17	Performance Report	OA-GA-17-011	Not started	2/27/17	9/6/19	
OA-GA-17-010-PE-SA2-17	Performance Report	OA-GA-17-010	Not started	2/28/17	9/6/19	
OA-GA-17-003F-PE-SA2-17	Performance Report	OA-GA-17-003F	Not started	3/1/17	9/6/19	
OA-GA-17-013-PE-Annual-17	Performance Report	OA-GA-17-013	Not started	3/2/17	9/6/19	
OA-GA-17-013-PE-Final-17	Performance Report	OA-GA-17-013	Not started	5/1/17	9/6/19	
NR17NRCSCENTC023-PE-Q2-19	Performance Report	NR17NRCSCENTC023	Acceptance Pending Edits	10/4/19	9/6/19	
CLM-2559	Claim	FX170200-10.C007	Draft		9/6/19	
AM17AMAXXXXG002-PE-SA2-2016	Performance Report	AM17AMAXXXXG002	Not started	12/28/16	9/6/19	

1 2 3 4 5 6 7 8 9 10 ... >

If you have a lot of work items, you may find the table tools helpful in locating specific work items (the table tools can be used with other sections on the **Home** screen as well):

- **Table Navigation:** If the table has more than one page, use the **Page Number** links to flip through the various pages of actionable items.
- **Sorting:** Click the title of a column to sort the column in ascending (A-Z, 0-9) order. Click the title again to sort the column in descending (Z-A, 9-0) order.
- **Filter:** Click the **filter** icon (small inverted triangle) to view the filter options menu. Select or input filter criteria then click the **Apply** button. More details about using filters are provided in the **Using ezFedGrants – Searching Job Aid**. Filtering may not be available for all columns.

The volume of work items assigned to you depends on your user role and whether you have been specifically assigned to certain tasks. Work items may be assigned to one person or multiple users. In the case of multi-user work items, when one of those users completes the work item, the work item is removed from all users' worklists.

If a work item is stuck with an inactive/invalid user or the user is otherwise unable to complete the work item, a user with the Grants Administrative Officer (GAO) role can reassign the work item to another user. Please refer to the **Reassigning Work Items in ezFedGrants Quick Reference** for more information.



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My Agreements

Click the section header to expand the **My Agreements** section.

This section lists your organization(s)' active agreements that are in ezFedGrants. It does not show closed agreements nor does it show agreements that are not managed in ezFedGrants.

My Agreements							
FAIN	Status	Project Title	Recipient Contact Name	Period of Performance		Total Federal Award Amount	Actions
FX170200-10.C006	Awarded	FAS Convergence Sprint 4 Demo	Sarah Whipple	1/9/15	1/9/17	\$156,700.00	I want to
FX170200-10.C007	Awarded	Report Testing	Grace Peterson	1/10/17	12/31/99	\$5,000.00	I want to
FX170200-10.C008	Awarded	NRCS Enterprise Demo	app pro1001	1/12/17	12/31/20	\$199,999.99	I want to
FX170200-10.G029	Awarded	NRCS Demo - agreement workflow	app pro1001	1/19/17	12/31/20	\$2,000.00	I want to
AP17PPQCPHSTG004	Awarded	Patrick Rhodey PPS Test Agreement	PAT RHODEY2	1/24/17	6/7/19	\$49,999.99	I want to

Click the **I want to...** link to access a menu of actions you can take on your agreements including viewing award documents, creating claims, or viewing reports, among other actions.

Period of Performance	Total Federal Award Amount	Actions
1/9/17	\$156,700.00	I want to
12/31/99		I want to
12/31/20		I want to
12/31/20		I want to
6/7/19		I want to

- View Agreement Details
- View Amendments
- View Federal Award Document
- View Claims
- Create Claim
- View Reports

To view agreements in ezFedGrants that are not listed in the **My Agreements** section, click the **Agreements** tile on the navigation menu.



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Notifications

Click the section header to expand the **Notifications** section.

This section displays read-only copies of messages sent to you by the ezFedGrants System. This includes application/report/claim/repayment status updates and new work item assignments. Some of these notifications may also be sent to you via email.

Click the **View Message** link to view the full text of the notification.

Notifications					
Transaction	Transaction ID	Status	Sent		Viewed
Application	APP-4284	Approved	3/25/19	View Message	✓
Application	APP-4284	Grant Review	3/25/19	View Message	✓
Application	APP-4284	Considered	3/25/19	View Message	✉
Claim	CLM-1718	Accepted for Payment Processing	3/19/19	View Message	✉

Unread notifications are indicated by an **Envelope** icon. Once a notification has been opened, the envelope changes to a checkmark.

Applications, Amendments, and Claims under Review

Click the section headers to expand these sections.

Applications under Review	+
Amendments under Review	+
Claims under Review	+

The **Applications under Review**, **Amendments under Review**, and **Claims under Review** sections list applications, amendments, and claims that are pending a Certifying/Signatory Official's signature or being processed by the awarding agency.

Click the **Application**, **Amendment**, or **Claim ID** to view a read-only version of the application, amendment, or claim, as well as the object's status.

Note: Currently, amendments are not processed through the ezFedGrants External Portal; therefore, until ezFedGrants amendment functionality is expanded, the **Amendments under Review** section will remain empty (even if there are amendments in progress for your agreements). Please contact an agency representative for updates regarding amendments to your organization(s)' agreements.

Panelist Home Screen

The **Panelist Home** screen, like the standard **Home** screen, is divided into several sections:

- **News and Notes**
- **Actionable Items**
- **Notifications**
- **Pending Consensus Review**

The **News and Notes**, **Actionable Items**, and **Notifications** sections function the same as they do on the standard **Home** screen (as described on the preceding pages of this document), except that the **Actionable Items** and **Notifications** sections only display items relevant to peer-review panels that you are assigned to. You must switch back to your standard role (Grants Administrative Officer, Grants Processor, or Signatory Official) to view your regular agreement-related work items and information.

The **Pending Consensus Review** section is unique to the **Panelist Home** screen. Click the section header to expand this section.

The **Pending Consensus Review** section lists applications that are being peer-reviewed by a panel that you are assigned to **and** that have reached the Consensus Review stage of the Application Review Panel (ARP) process.

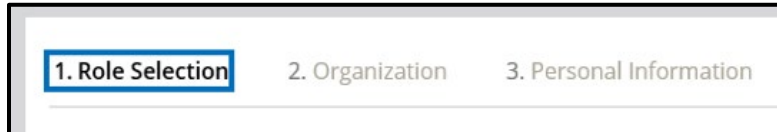


Other Active Screen Elements

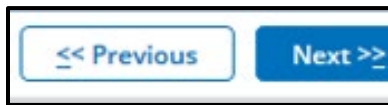
This section describes other common features you will encounter on screens other than the **Home** screen.

Stage Indicators & Tabs

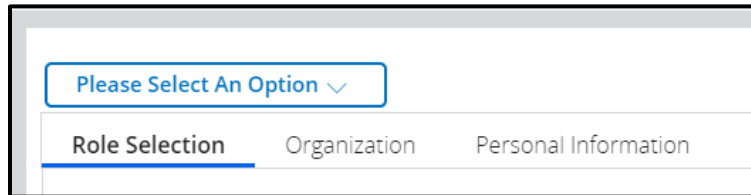
When you are completing a multi-stage process (preparing reports or creating applications, claims, or repayment requests), you will see all of the stages listed at the top of the screen. The stage you are currently viewing will be bolded.



Click a stage title or use the **Next** and **Previous** buttons to move between stages. Please note that the check marks do not indicate that a stage is necessarily “complete”, but simply that you have advanced past that stage.



If you are viewing a read-only version of an object (application, report, claim, etc.) or completing a work item, the stages may be presented as tabs instead of floating text. Click a tab to switch to that tab.



Close Button

The **Close** button closes the active screen **without saving**. If you want to save your changes, please be sure to click the **Save** button prior to closing the active screen. Some screens will warn you that you are about to lose unsaved changes, but some screens will not.



The **Close** button may not immediately return you to the **Home** screen; instead it closes the active screen and returns you to whichever screen you were viewing previously. For example, if you logged in to ezFedGrants (the **Home** screen), then went to search opportunities (**Search Opportunities** screen), opened an opportunity (**Opportunity** screen), and finally clicked the **Create Application** button on that opportunity, you would be on the **Create Application** screen. If you clicked the **Close** button from there, you would be taken back to the **Opportunity** screen. Clicking the **Close** button again, you would go back to the **Search Opportunities** screen, and finally to the **Home** screen.



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See Also

Job Aids

- Using ezFedGrants – Searching Job Aid
- Using ezFedGrants – Your User Profile Job Aid
- ezFedGrants External User Onboarding Quick Reference
- ezFedGrants External Portal User Roles Quick Reference
- Working with Multiple Organizations in ezFedGrants Quick Reference
- Reassigning Work Items in ezFedGrants Quick Reference

Need Help?

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

Version Control

Name	Date	Changes Made
Abael Solomon	Jan. 2022	Updated OCFO Website Link
April Murphy	Sept. 2019	Initial document created