



ezFedGrants Role & Access Management

Job Aid

Before You Begin

This document explains how Grants Administrative Officers (GAOs) can deactivate or change roles for other users in their organization(s).

Only GAOs can deactivate and change roles for other users; GAOs cannot deactivate/change their own role. If your organization has only one GAO and that GAO is completely unable to access ezFedGrants (ex. no longer with your organization or has a locked eAuthentication account), please contact the ezFedGrants Help Desk at ezFedGrants-cfo@usda.gov for assistance.

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.
- **User Role:** A user's role determines what data and features a user can access in ezFedGrants. Each external user must be assigned one (and no more than one) of the three primary user roles, which are Grants Administrative Officer (GAO), Grants Processor (GP), and Signatory Official (SO).

You Will Need

- An eAuthentication Verified Identity Account
- The Grants Administrative Officer (GAO) role in ezFedGrants

Contents

BEFORE YOU BEGIN	1
KEY TERMS.....	1
YOU WILL NEED.....	1
CONTENTS	1
DATA NOTE.....	1
DETERMINE CHANGES	2
NOTE ON WORK ITEMS	2
ADMINISTRATIVE REPORTS.....	2
NOTE ON GAOS.....	2
GETTING STARTED	3
EXECUTE CHANGES/REMOVALS	5
CHANGE ROLE	5
REMOVE FROM ORGANIZATION	5
SEE ALSO	6
JOB AIDS.....	6
FAQS.....	6
NEED HELP?.....	6
VERSION CONTROL	6

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.



ezFedGrants Role & Access Management

Job Aid

Determine Changes

Before making any changes in ezFedGrants, determine which users are impacted and what specific actions are needed for each user. The following prompts may assist you:

- Do you need to **change the primary user role** for one or more users?
 - What is the user's current role?
 - What role do you need to change them to?
 - Will anyone replace the user? For example, if you switch a Signatory Official to Grants Processor, will you also switch another user to Signatory Official?
 - Refer to the **ezFedGrants External Portal User Roles Quick Reference** for more information.
- Do you need to **deactivate** one or more users?
 - Deactivating a user will remove them from your organization in ezFedGrants but **will not** impact their eAuthentication Verified Identity Account.
 - *If a deactivated user was a partner on any active/pending awards (including applications under review), the application/agreement may need to be edited/amended to replace the deactivated partner.*
 - If the user is deactivated from all organizations with which they are affiliated, they will no longer have access to ezFedGrants and must submit a new access request to regain access.
 - You can only remove users from organizations for which you are the GAO. If a deactivated user is affiliated with any organizations for which you **are not** the GAO, the user will still have access to those organizations.
 - Refer to the **Working with Multiple Organizations in ezFedGrants Quick Reference** for more information.

Note on Work Items

When changing roles and deactivating users, you may need to reassign work items that the user cannot complete (either due to being deactivated or because their new user role does not allow them to complete the work item). Refer to the **Reassigning Work Items in ezFedGrants Quick Reference** for guidance.

Administrative Reports

To facilitate this entire process, you may wish to generate a **User Report** and a **Work Item Management Report** to see an overview of your organization(s)' users and their currently-assigned work items. Instructions are provided in the **ezFedGrants Administrative Reports Job Aid**.

Note on GAOs

As a GAO, you cannot modify your own role or deactivate yourself.

If you personally should be deactivated or assigned to a different role, another GAO from your organization(s) can deactivate you or change your role.

If you are the only GAO in your organization, you must first assign another user to the GAO role, then the new GAO can deactivate you or change your role.

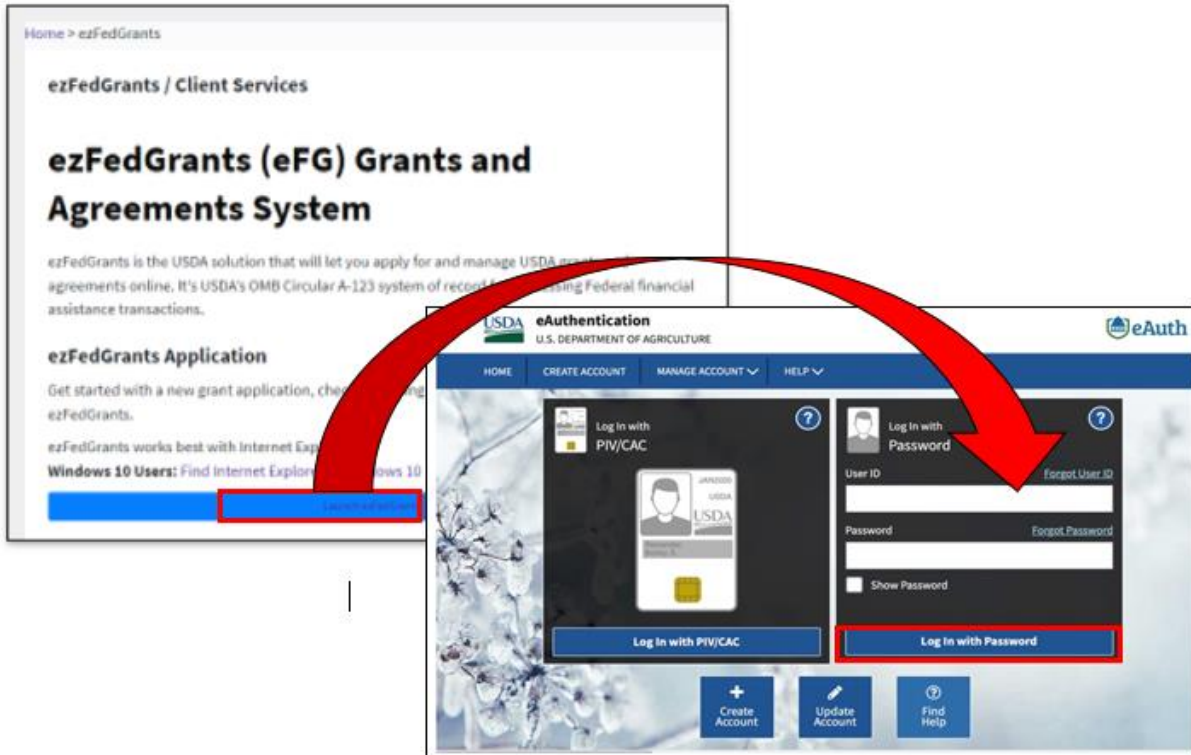
If you are literally the only user in your organization, please contact the ezFedGrants Help Desk at ezFedGrants-cfo@usda.gov for assistance.

ezFedGrants Role & Access Management

Job Aid

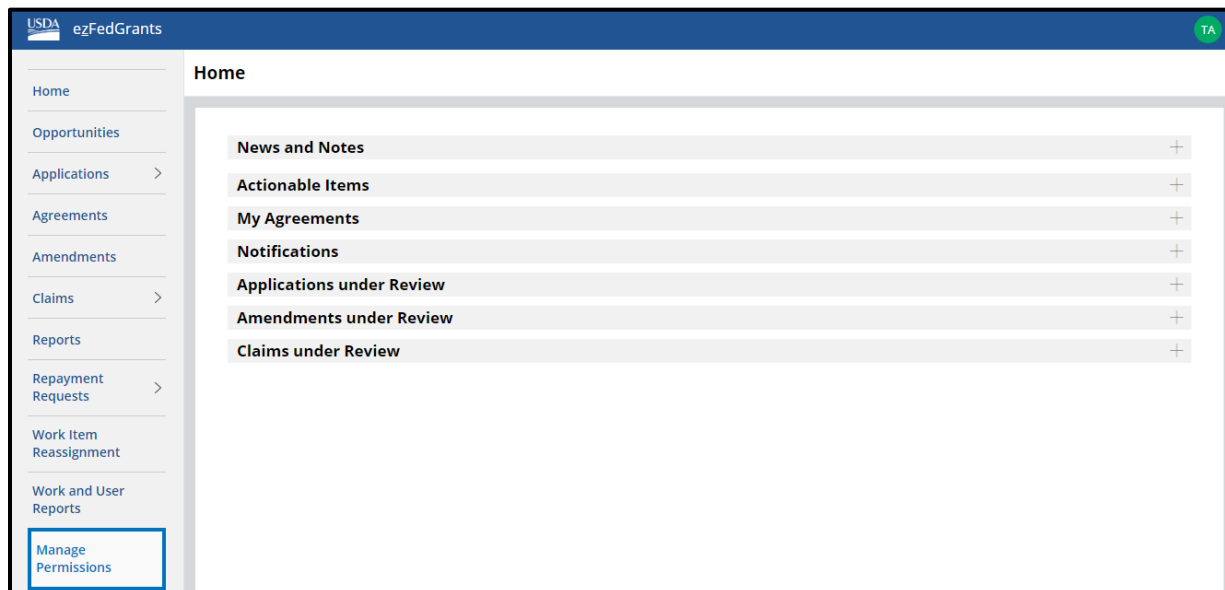
Getting Started

1. 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](#).

2. From the **ezFedGrants External Portal Home** screen, click the **Manage Permissions** tile to open the **Permissions** screen.





ezFedGrants Role & Access Management

Job Aid

On the **Permissions** screen, select either **Change Role** or **Remove from Organization** from the **Select an Action** dropdown menu.

If you are affiliated with multiple organizations, select the relevant organization from the **Select Organization** field dropdown menu.

Finally, click the **Search** button.

The screenshot shows a window titled "Permissions" with a "Close" button in the top right. Below the title bar, there are two dropdown menus: "Select an Action" and "Select Organization". The "Select an Action" dropdown is set to "Change Role". The "Select Organization" dropdown is set to "AMS Wildlife Foundation US 1-4". To the right of these dropdowns is a "Search" button.

- Upon clicking the **Search** button, the **Change Role** or **Remove from Organization** table will appear on the **Permissions** screen (depending on the selected action). These tables list all users, except yourself, who have access to ezFedGrants under the organization indicated in the **Select Organization** field. Your name does not appear on this list because GAOs cannot deactivate themselves or change their own role. Refer to the **Note on GAOs** in the **Determine Changes** section of this document for more details.

In the table, locate the user you want to change/remove. You can only change/remove one user at a time. Furthermore, you can only remove a user from one organization at a time. If you need to make multiple role changes or removals, you will need to repeat this procedure for all the changes/removals.

If the user is not listed in the table, then the user is not affiliated with the organization indicated in the **Select Organization** field. If the organization has multiple GAOs, another GAO may have already deactivated the user. If you are affiliated with multiple organizations, please ensure you have selected the correct organization in the **Select Organization** field.

The screenshot shows the "Permissions" window after a search. The "Change Role" dropdown is still selected, and the "AMS Wildlife Foundation US 1-4" organization is chosen. The "Search" button is highlighted with a blue box. Below the form is a table titled "Change Role" with four columns: "User ID", "Name", "Role", and "Options". The first row of the table is highlighted with a red box, showing the user "GAO APHIS" with the role "Grant Administrative Officer".

User ID	Name	Role	Options
GAOExternalNIFA	GAO APHIS	Grant Administrative Officer	Change
GAOExternal	GAO External	Grant Administrative Officer	Change
GAOUser4	GAO USER4	Signatory Official	Change
282009070100115 33556933	ARS ARS-ST-GL- MGMT-Eval	Signatory Official	Change

ezFedGrants Role & Access Management

Job Aid

Execute Changes/Removals



Deactivating/changing roles may impact active/pending awards and incomplete applications.

Work items assigned to deactivated/changed users may need to be reassigned.

*Please review the notes and information in the **Determine Changes** section of this document before proceeding.*

Change Role

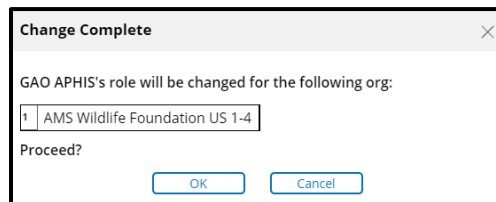
To change the user's role, select the new role in the **Role** column and then click the **Change** button.

The user's role will be changed for all organizations with which they are affiliated.

Change Role			
User ID	Name	Role	Options
GAOExternalNIFA	GAO APHIS	Grant Administrative Officer	<input type="button" value="Change"/>

Upon clicking the **Change** button, a popup window will appear asking you to confirm your change. This popup window will list all organizations the user is affiliated with, because role changes are applied to all of the user's organizations.

Click **OK** to proceed with the change. The role change will be effective immediately.



Remove from Organization

To deactivate the user's ezFedGrants access, click the **Remove** button.

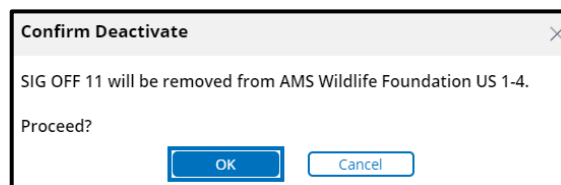
The user will only be removed from the organization indicated in the **Select Organization** field, but they will still have access for any other organizations with which they are affiliated.

If you are GAO of multiple organizations, and you need to remove the user from all/several of your organizations, you must repeat this procedure for each organization.

Remove from Organization			
User ID	Name	Role	Options
GAOExternalNIFA	GAO APHIS	Grant Administrative Officer	<input type="button" value="Remove"/>

Upon clicking the **Remove** button, a popup window will appear asking you to confirm the removal.

Click **OK** to proceed with the deactivation. The removal will be executed immediately.





ezFedGrants Role & Access Management

Job Aid



See Also

Job Aids

- ezFedGrants External Portal User Roles Quick Reference
- Working with Multiple Organizations in ezFedGrants Quick Reference
- ezFedGrants Administrative Reports Job Aid
- Reassigning Work Items in ezFedGrants Quick Reference

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
Kandice Whitaker	Mar. 2022	OCFO email update Updated OCFO website link
Abael Solomon	Jan. 2022	Updated OCFO website link
April Murphy	Sept. 2019	Initial Document Created