Role Assignment Request
Job Aid

Before You Begin

This document provides instructions for external users to submit an initial Role Assignment Request which is required to view information (such as opportunities and agreements) and complete grants- and agreements-related tasks in ezFedGrants.

If you already have access to ezFedGrants, you can join additional organizations through your user profile. Refer to the **Working with Multiple Organizations in ezFedGrants Quick Reference** for more information.

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 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) numbers, 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 verified-identity Account
- The UEI number or other organization ID for all organizations you will represent in ezFedGrants

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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.

Getting Started

1. Launch the ezFedGrants External Portal (from the OCFO ezFedGrants website) and log in with your Login.gov verified-identity Account.
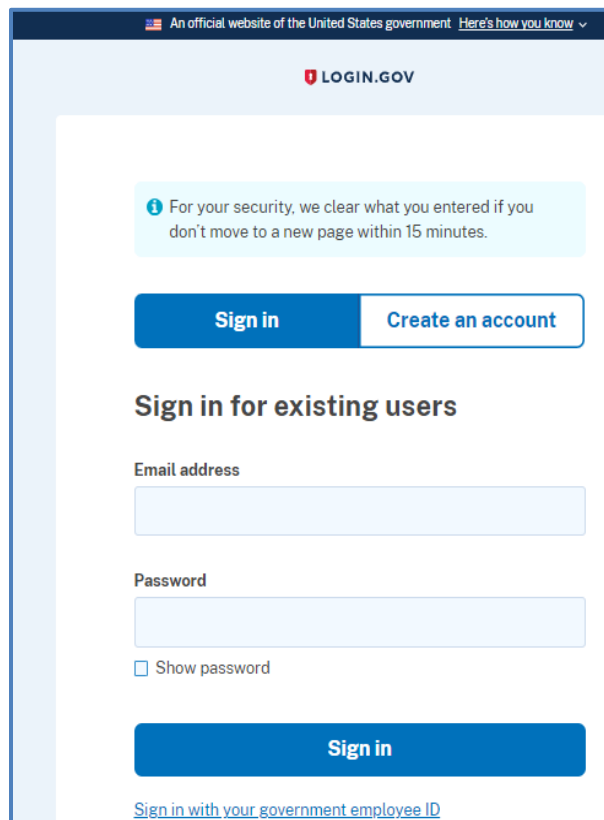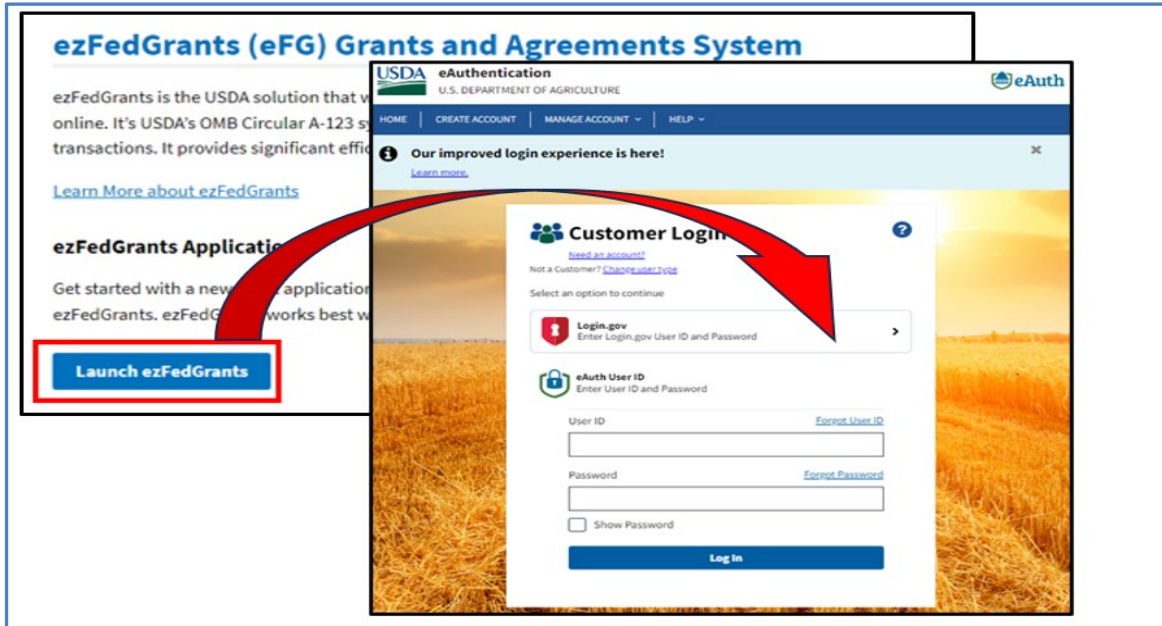
Note: For questions regarding ezFedGrants access, including logging-in and eAuthentication, please review the [ezFedGrants FAQs general](#).

2. Click the **Create Role Assignment Request link** when you reach the **ezFedGrants External Portal Home** screen.

   Note: If you see other tiles, such as **Opportunities, Applications,** and **Claims,** instead of the **Role Assignment Request** link, then you already have access to ezFedGrants. You can submit a Role Assignment Request for additional organizations through your **User Profile** (click your **Initials** in the upper-right corner and then select **Profile** on the dropdown menu).

![USDA logo]
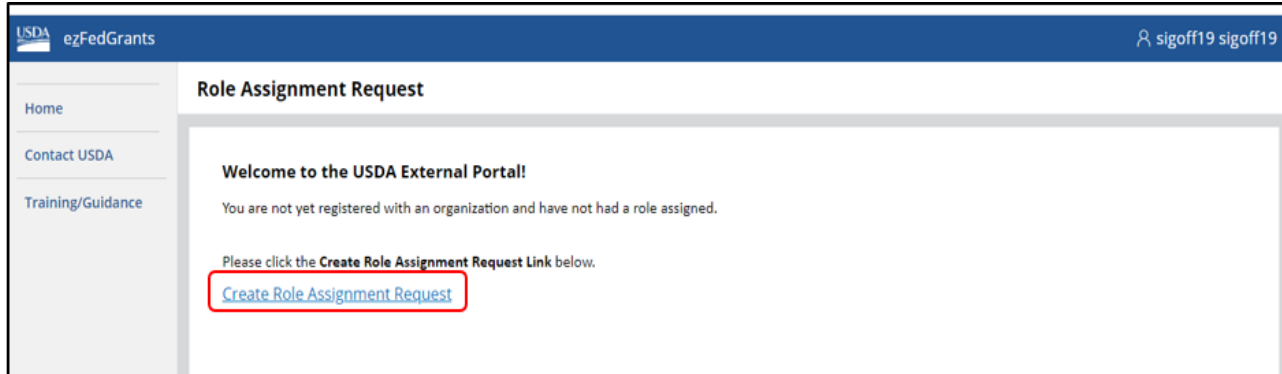
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Select Role

First, you must select a primary user role. The actions available for each primary user role are summarized below. Please refer to the **ezFedGrants External Portal User Roles Quick Reference** for complete definitions.

- **Grants Administrative Officer (GAO):** Prepares applications, claims, repayment requests, and reports. Can sign reports, repayment requests, and claims. Manages user roles, access, and work items for other users within the same organization.
- **Grants Processor (GP):** Prepares applications, claims, repayment requests, and reports. Can sign reports, repayment requests, and claims.
- **Signatory Official (SO):** Prepares reports. Signs applications, agreements, and amendments. Can sign reports, repayment requests, and claims.

You can only have one primary user role and your role will be the same for all organizations.

If you select the wrong role, you can edit your request, or the reviewer can change your assigned role when reviewing your Role Assignment Request. If the reviewer approves your request with the incorrect role, your role can be changed by a user with the GAO role. Please refer to the **ezFedGrants Role and Access Management Job Aid** for more information.

1. On the **Role Assignment Access** screen, select **Grants Administrative Officer, Grants Processor,** or **Signatory Official** from the **User Role** field dropdown menu.

    If you select the Grants Administrative Officer (GAO) role, select an agency from the **Agency** field dropdown menu. This agency will review your Role Assignment Request if you request access for an organization that does not already have ezFedGrants users or does not have a current GAO. Furthermore, this field **does not** affect your ezFedGrants access, it is simply for access approval purposes.

2. In the **Access Request Comments** text box, explain why you are submitting this Role Assignment Request or why you have requested a particular role.

3. Click the [**Next**] button.

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Select Organization(s)

Now you must select at least one organization for which you will complete grants and agreements management activities in ezFedGrants (submitting applications, claims, reports, etc.). You can be affiliated with multiple organizations, but you do not have to include every organization on your initial Role Assignment Request. Refer to the **Working with Multiple Organizations in ezFedGrants Quick Reference** for more information.

In the ezFedGrants System, each organization is identified by a unique ID, such as a UEI number. Small organizations may have only one UEI number, but larger organizations may have multiple UEI numbers under a single institutional umbrella (such as separate departments or campuses of a single university).

After your Role Assignment Request is approved, if you selected the wrong organization, separate from an organization, or otherwise no longer require ezFedGrants access for an organization, a user with the GAO role can deactivate your access for that organization.

1. On the **Role Assignment Request** screen, click the [**Add Organization**] button to open the **Search Organization** popup window.

2. In the **Search Organization** popup window, complete at least one **Search Criteria** field. It's encouraged to enter your organization UEI only in the search criteria and then click the [**Search**] button.

   The **Organization** field will search by organization title as it appears in the ezFedGrants System, which is derived from SAM.gov and/or IRS records. If you are unsure of your organization's registered title, please use another field.

3. Locate your organization in the **Search Results** table, confirm that the details are correct (some organizations have multiple records or similar names/IDs), and then click the **Join Organization** link.

   If the search does not return the correct record (or any record) for your organization, try changing your search criteria, double-check the UEI number or other ID on your organization's SAM.gov record, or contact the ezFedGrants Help Desk through the **Contact USDA** link on the left-side menu.

Role Assignment Request RA-49223 | Print | Close | Withdraw | Save | << Previous | Next >>

Select Organization

Search Criteria - please enter one or more criteria

Organization Name	UEI Number ⑦	EFT Number ⑦	CAGE Code ⑦
University of FMMI			

City	State	Postal Code ⑦	Country
	⌄		⌄

ASAP ID ⑦	DUNS Number ⑦	DUNS+4 ⑦

Multiple search criteria narrows the search (works as a **filter**)

If you do not receive the results you are looking for, **use fewer items** in your search criteria. (*i.e. Instead of City and State, remove City and leave only*

State)

Search | Clear | Close

Search Results

Actions	Organization	UEI	EFT	DUNS Number	DUNS +4	CAGE Code	Street Address	City	State	Postal Code	Country
Join Organization	UNIVERSITY OF FMMI LAB A	GGTESTUEI037	1234	111111222	1234		PO BOX 866	OXFORD	PA	17234-0866	US

4. Upon clicking **Join Organization**, the **Search Organization** popup window will close, and the selected organization's details will appear on the **Role Assignment Request** screen.

   Complete the **Point of Contact Details** fields to identify a Point of Contact (POC) who can confirm your affiliation with this organization and/or your need for ezFedGrants access.

   Note: If you selected the wrong organization, click the [**Remove**] button.

Role Assignment Request RA-50220 | Print | Close | Withdraw | Save | << Previous | Next >>

CRM Organization ID	UEI	EFT	CAGE
1502308502	GGTESTUEI038	0000	N/A

Street Address	City	State	Postal Code
PO BOX 866	OXFORD	PA	17234-0866

Phone	ASAP ID	DUNS	DUNS+4
N/A	N/A	012345678	0000

Point of Contact Details

* Supervisory Point of Contact (POC)	* School/Dept/Div/Prog.	* POC Email	* POC Phone
l kavanaugh	qa	laura.kavanaugh@usda.gov	(999) 000-0000

5. Only one organization is required to submit a Role Assignment Request; however, if you are affiliated with multiple organizations (i.e. UEI numbers), you may wish to include all your organizations on this Role Assignment Request. Alternately, you can join additional organizations through your **User Profile** any time after your initial Role Assignment Request is approved.

Click the [**Add Organization**] button (at the bottom of the screen) to add another organization. Repeat until you have added all organizations. You must enter POC details for each organization even if they all have the same POC.

6. Once you have added all organizations you wish to include with your **Role Assignment Request**, click the [**Next**] button.

![USDA logo]

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Finalize Role Assignment Request

1. On the **Role Assignment Request** screen, complete the various **Work Contact Information** fields.

   At minimum you must complete the **Occupation, Work Street Address, City, State, Postal Code, Work Phone,** and **Work Email** fields. Required fields are indicated with a red asterisk.

2. Click the [**Submit**] button to submit your **Role Assignment Request**.

3. Upon successful submission, you will see a confirmation message and a list of reviewers who have received your **Role Assignment Request**. If you included multiple organizations, you will see a separate list of reviewers for each organization.

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"No Grants Administrative Officer (GAO)" Error: This error occurs if you select the Grants Processor (GP), or Signatory Official (SO) role *and* you select an organization for which there are currently no ezFedGrants users or the organization does not currently have a GAO. The first user to submit a **Role Assignment Request** for an organization in ezFedGrants must select the GAO role; therefore, no one can submit GP or SO **Role Assignment Request** for this organization until the GAO's **Role Assignment Request** is approved (by a USDA agency). If you see the "No GAO" error, you must either remove the organization from your **Role Assignment Request** (and select a different organization, if your request only includes one organization), or change the role request to GAO, or discard the **Role Assignment Request** and wait until a GAO has been approved.

4. Close and verify the **Role Assignment Request** for your organization in progress. You should receive a confirmation email when your **Role Assignment Request** is approved. If you included multiple organizations on your **Role Assignment Request**, each organization must be approved separately; however, you will have access to ezFedGrants as soon as one organization is approved (you will only have access to agreements and other actions for approved organizations).

5. When your **Role Assignment Request** is approved by your organization GAO or the USDA Agency representative, you can verify the role associated with your account simply by logging into ezFedGrants, click on your name displayed in the top right-hand corner, then click on "Switch Roles" from drop down menu as depicted in screenshot below.

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Review Role Assignment Request

After submitting the Role Assignment Request, users will have the ability to review their role assignment requests if needed. Below are the steps to review your submitted Role Assignment Request.

1. Click on your request link and select **Review Request.**

Role Assignment Request

Welcome to the USDA External Portal!

You are not yet registered with an organization and have not had a role assigned.

Below is a list of cases pending approval (per organization). Please click on the Case ID link to **review** or **edit** the request.

Review/Edit	Role	Organization	Create Date	Approver
RA-50237	Signatory Official	UNIVERSITY OF FMMI LAB A	10/2/23	Org Grant Admin Officer
RA-50238	Signatory Official	SOUTHSHORE COLLEGE	10/2/23	Org Grant Admin Officer

Review Request
Edit Role
View Approvers
Withdraw Request

2. You can review your submitted **Role Assignment Request** as below:

Role Assignment Request (RA-50238)   Print   Close

Status:
Submitted

Role Selection   Organization   Personal Information   Approvers

Role Selection
User Role
Signatory Official

Access Request Comments
Why are you submitting this access request?
ENHC11373

Additional Information

Edit Role Assignment Request

The user will have the option to edit their role assignment request once submitted.

1. Click on the **Role Assignment Request Number Link** and select **Edit Role**.

2. You can select a different **User Role** from the dropdown menu. Enter text into the **Role Assignment Request** Comments box and select **Submit**.

View Approvers

This section demonstrates how to view the person(s) assigned to approve a Role Assignment Request.

1. To view the person(s) assigned to approve a Role Assignment Request, click on the **Request Link**, and select **View Approvers** from the dropdown list.

Welcome to the USDA External Portal!

You are not yet registered with an organization and have not had a role assigned.

Below is a list of cases pending approval (per organization). Please click on the Case ID link to **review** or **edit** the request.

Review/Edit	Role	Organization	Create Date	Approver
RA-50228	Grant Administrative Officer	ARCHBOLD EXPEDITIONS, INC.	9/28/23	Org Grant Admin Officer

- Review Request
- Edit Role
- View Approvers
- Unavailable Organization Approver
- Withdraw Request

2. The list of Approvers will be displayed in a pop-up window.

gistered with an organization and have not had a role assigned.

ases pending approval (per organization). Please click on the Case ID link to **review** or **edit** the request.

View Approvers   ✕

| Name	E-Mail	Phone	Last Signon
GAO 13	lester.wheeler@usda.gov	(504) 555-5555	09/29/2023 03:56 PM

Withdraw Role Assignment Request

This section demonstrates how to withdraw a submitted Role Assignment Request.

1. To withdraw a **Role Assignment Request**, click on the desired request link and select **Withdraw Request**.

2. Enter explanation into the **Notes** field and click **Submit**.
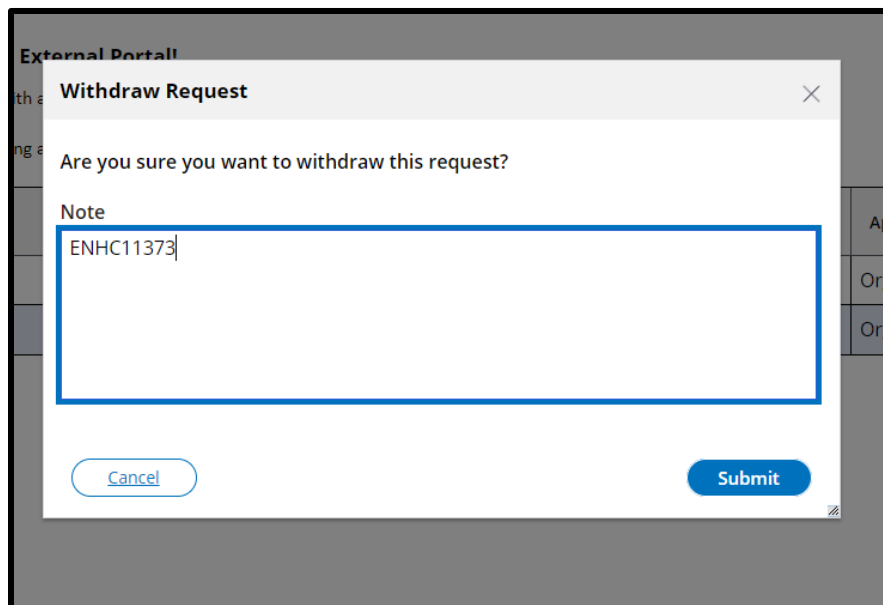
Unavailable Organization Approver

The "Unavailable Organization Approver" option is only used when the GAO for your organization is unavailable to approve your request and you have requested the GAO role. Below are the steps to reroute your request to the agency.

1. Click on the **Role Assignment Request** link and select **Unavailable Organization Approver.**

2. If your organization's GAO has not signed in within the last two weeks, you will be presented with the below screen. Select the **Re-Route Request** check box. Click **Submit.**

3.   Your **Role Assignment Request** will show that the request has been rerouted to the agency for approval.

Role Assignment Request

Welcome to the USDA External Portal!

You are not yet registered with an organization and have not had a role assigned.

Below is a list of cases pending approval (per organization). Please click on the Case ID link to **review** or **edit** the request.

Review/Edit	Role	Organization	Create Date	Approver
RA-50229	Grant Administrative Officer	ARCHBOLD EXPEDITIONS, INC.	9/29/23	Agency: NIFA

4.   If there is a GAO that has signed in within the last two weeks, you will see this screen. If there is no approver available, please contact the ezFedGrants help desk at ezfedgrants-cfo@usda.gov.

ezFedGrants   OCE OCE-ST-AP-B

Role Assignment Request

me

ntact USDA   **Welcome to the USDA Extern**

ining/Guidance   You are not yet registered with an org

                   Below is a list of cases pending appro

Re-route To Agency   X

Your request is not eligible to re-route the approval since at least one of your approvers has signed in within the last two weeks.
Please use the list below to contact one of your organization approvers to expedite your request.
Please contact the USDA help desk if all approver(s) have left your organization.

Name	E-Mail	Phone	Last Signon
Test ARS2	celiacarson@gmail.com	(123) 456-7890	04/06/2021 03:47 PM
Test ARS	celia.carson@gmail.com	(202) 720-9999	12/07/2022 12:22 PM
ARS ARS-ST-GL-App	TEST2@GMAIL.COM	(999) 999-9999	07/26/2023 01:58 PM
app pro1001	developer@sampledata.net	(111) 555-0987	07/19/2023 03:03 PM
Fresh Opp	FreshOpp@test.com	(123) 123-1234	07/20/2023 03:59 PM
GAO1 GAO1	celia.carson@usda.gov	(123) 456-7890	05/12/2023 11:10 AM
GAO External	test@test.com	(123) 123-1234	02/27/2020 12:10 PM
TEST GAO	celiacarson@gmail.com	(123) 456-2222	08/31/2023 12:05 PM
TEST GAO 2	celia.carson@comcast.net	(123) 456-7890	01/10/2023 03:50 PM

Cancel   Submit

Review/Edit   Approver

RA-14852   Org Grant Admin O

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Job Aids
- Using ezFedGrants - The Basics Job Aid
- eAuthentication Account Creation Job Aid
- ezFedGrants External Portal User Roles Quick Reference
- Working with Multiple Organizations in ezFedGrants Quick Reference

ezFedGrants Hyperlinks
- ezFedGrants Home page
- ezFedGrants FAQs general

External Hyperlinks
- SAMs for Unique Entity Identifier

Need Help?

Contact: ezfedgrants-cfo@usda.gov

Version Control

Name	Date	Changes Made
Abael Solomon	Oct 2023	Updated Verbiage and Screenshots to reflect the new enhancement in Pega.
Abael Solomon	May 2023	Updated Verbiage and Screenshots
Abael Solomon	July.2023	Updated PDF Attachment Language
Kandice Whitaker	May 2022	Removed DUNS screenshots Add link to SAMs
Abael Solomon	April 2022	Removed Broken Links
Abael Solomon	Jan. 2022	Updated OCFO website link
Kandice Whitaker	Oct 2021	Updated "Need Help" section
April Murphy	Sept. 2019	Initial document created