



Submitting Claims and Progress Reports

GM 301





Agenda



- Module 1 – Course Introduction
- Module 2 – Create and Submit Claims
- Module 3 – Submit Progress Reports
- Module 4 – Course Summary



Module 1

Course Introduction



Course Overview



- The purpose of this course is to describe the processes and transactions that support claims and progress reports within ezFedGrants.
- This course is also designed to help users understand where to find help and training materials.



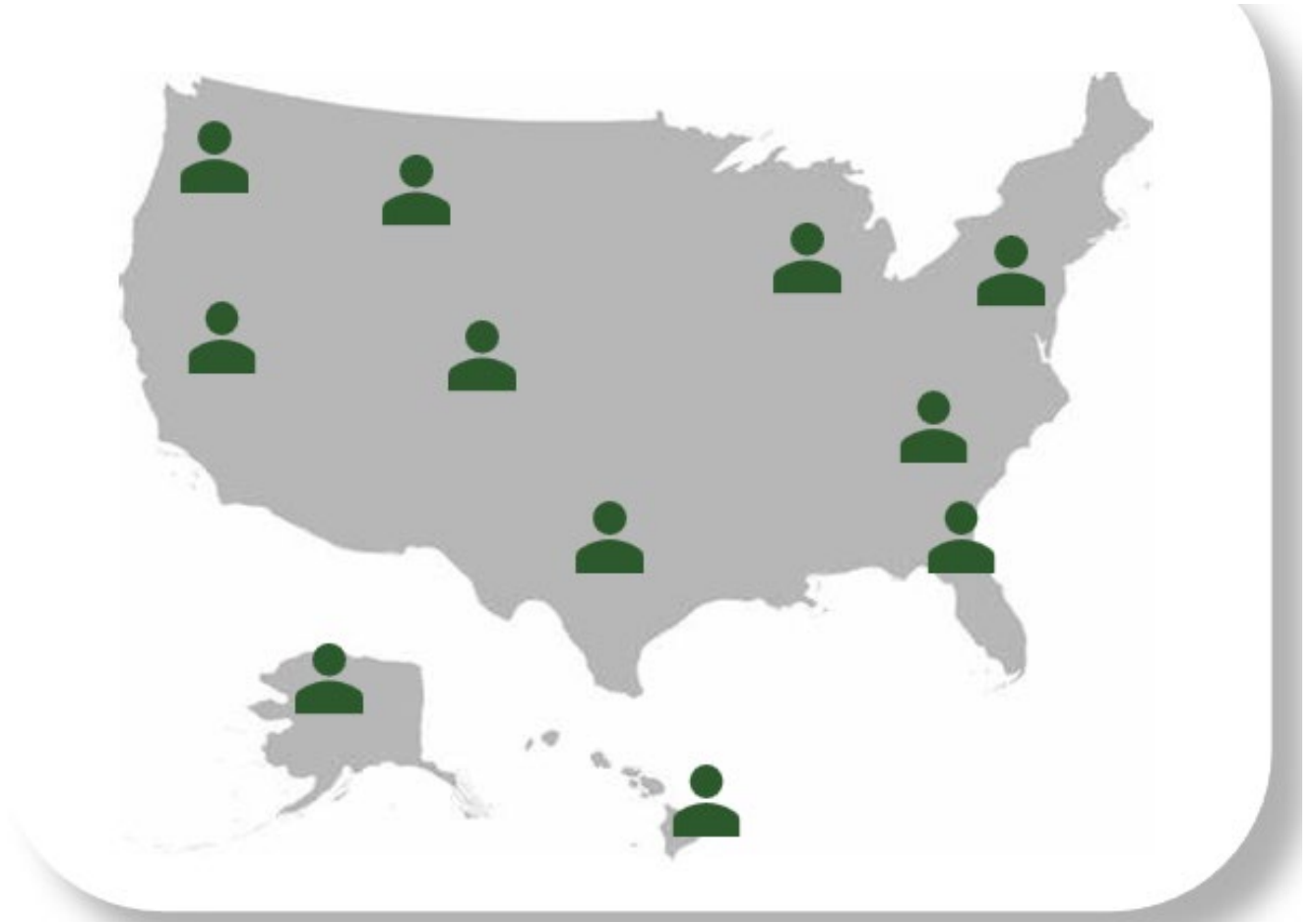


Introduction Instructor and Students



In the chat, please share your:

- Location
- Organization
- Role
- Expectations






Session Recorded





- Session is being recorded and will be available for attendees after the session within the Teams chat.
- Transcripts are also provided.


 Thursday 2:45 PM Meeting ended: 3h 24m 38s

ezFedGrants Agency Training
Tuesday, October 15, 2024 12:00 PM - 2:00 PM

[View recap](#)

Content

 Transcript  Internal I_Access-Intro.pptx +2

 3 recordings



Participation



- Participation is encouraged!
- Feel free to ask questions in the **Chat** or in the **Q&A** section of Teams.
- **Raise** your hand or **React** in Teams.



Chat



Q&A



People



Raise



React



Polls



How to Get Answers to Your Questions



Login.gov

- For Login.gov, call (844) 875-6446. Operating hours are 24 hours a day, seven days a week.
- Login.gov: (844) 875-6446, [Login.gov FAQs](#)

ezFedGrants

- Contact the ezFedGrants Help Desk: ezFedGrants-cfo@usda.gov
- Training Schedule [eFG Training Schedule](#)
- Recipient job aids: [Job Aid Library](#)



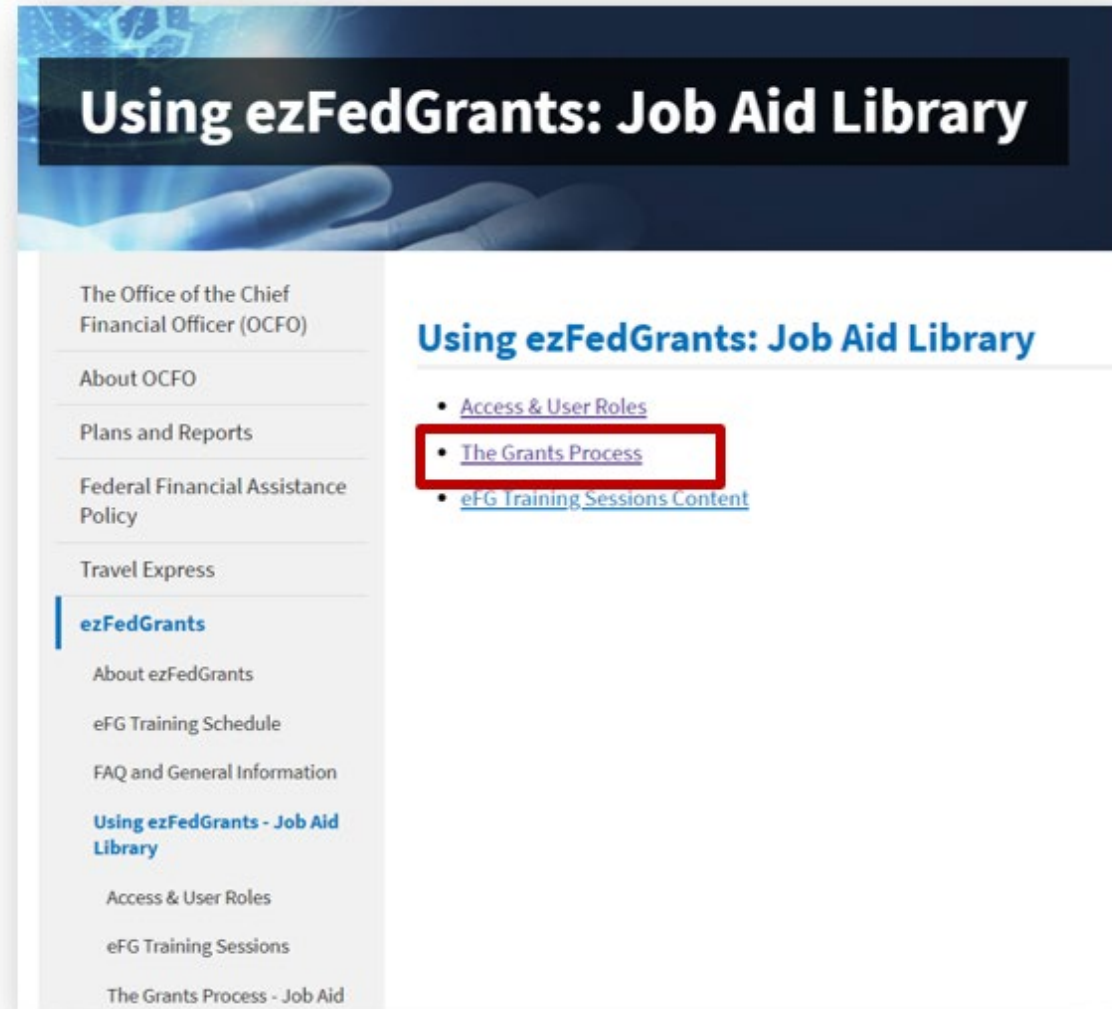
Bookmark or favorite these links!



Job Aid Library



- Access this site for support.
- Includes job aids, training session records and other useful information.
- [Using ezFedGrants: Job Aid Library](#)



Module 2

Create and Submit Claims



Module 1 – Create and Submit Claims Objectives



After completing this module, you should be able to:

- Create a claim in ezFedGrants
- Submit a claim in ezFedGrants

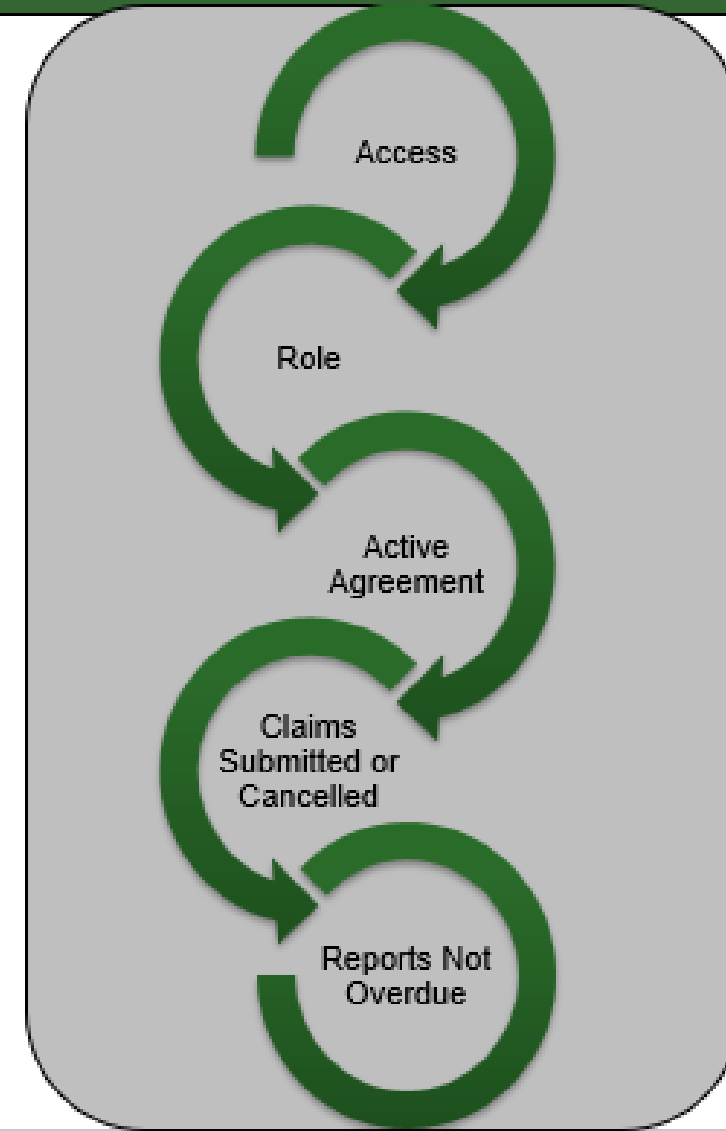




Create and Submit Claims Prerequisites



- Access to ezFedGrants.
- User role with permissions to create and/or certify (digitally sign) claims.
- Agreement must be in active status.
- Previously claims must be one of the following:
 - Certifying Official (CO) digitally signed, submitted claim to USDA agency
 - Claim is cancelled
- Performance and financial progress reports submitted to USDA agency and not overdue.





Claim Types



- There are various types of expenses within claims.
- For example, personnel, equipment or supplies.
- A **Cost Element** is a type of account.

| 14. Requested Amounts by Cost Element | | | | | |
|---------------------------------------|------------------|--------------|-------------------------|---------------------------|------------------------|
| Cost Element | Disbursed Amount | Open Balance | Direct Requested Amount | Indirect Requested Amount | Total Requested Amount |
| Contractual | \$0.00 | \$0.00 | | | |
| Personnel | \$0.00 | \$0.00 | | | |
| Fringe Benefit | \$0.00 | \$0.00 | | | |
| Domestic Travel | \$0.00 | \$0.00 | | | |
| Foreign Travel | \$0.00 | \$0.00 | | | |
| Equipment | \$0.00 | \$0.00 | | | |
| Supplies | \$0.00 | \$0.00 | | | |
| Printing | \$0.00 | \$0.00 | | | |
| Other | \$0.00 | \$0.00 | | | |
| Total Indirect Cost Requested | | | | | |
| Totals | \$0.00 | \$0.00 | | | |



Recipient Claim Review



What is the claim review process?

1. Certifying Official (CO) reviews claim for adherence to Agency procedures and accuracy.
2. CO submits to the Agency.
3. If CO returns, it goes back to claim processor for changes and resubmittal.
4. Once submitted, the claim is routed to USDA agency for approval.
5. Agency reviews and approves the claim.
6. An invoice is generated, and claim data is sent to FMMI Accounts Payable (A/P) to pay.
7. Claim status in ezFedGrants is paid.

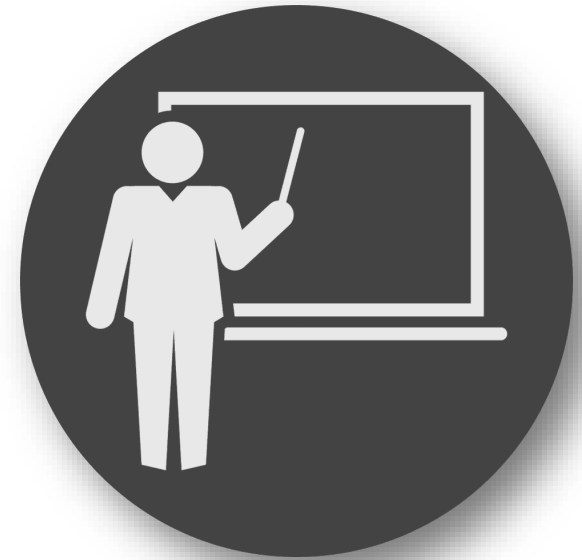




Training Data



- Data used in this course is a representative sample for training.
- ezFedGrants data varies based on agency and scenario.
- However, the navigation and how system works is the same.





Create Claims Getting Started



Carefully review and complete the forms!

Some screenshots may display only a portion of the screen. Scroll, as needed.

1. Access **ezFedGrants** **Home** screen.
2. Select **Claim** > **Create Claim**.

| Transaction ID | Transaction |
|----------------|-------------|
| APP-5386 | Application |



Create Claims Search Agreements



The **Search Agreements** screen opens with **Search Criteria** fields.

1. Enter agreement information for the claim.
2. Click the **Search** button.

Search Agreements

Search Criteria

| | | | |
|--|--|--|--|
| FAIN <input type="text" value="NR18NRCSCENTG002"/> | Project Title <input type="text"/> | Period of Performance Start Date <input type="text" value="M/d/yyyy"/> - <input type="text" value="M/d/yyyy"/> | Recipient Contact Name N/A ↗ |
| Period of Performance End Date <input type="text" value="M/d/yyyy"/> - <input type="text" value="M/d/yyyy"/> | | Status Awarded | |



Create Claim Link



1. Locate agreement in **Search Results**.
2. Click **Create Claim** link to initiate claim creation.

Search Agreements

Close

Search Criteria

FAIN

NR18NRCSCENTG002

Project Title

Period of Performance Start Date

M/d/yyyy

M/d/yyyy

Recipient Contact Name

N/A

Period of Performance End Date

M/d/yyyy

M/d/yyyy

Status

Awarded

Search

Clear

Search Results

Export

| FAIN | Status | Project Title | Recipient Contact Name | Performance Start Date | Performance End Date | Total Federal Award Amount | Actions |
|----------------------------------|---------|--|------------------------|------------------------|----------------------|----------------------------|------------------------------|
| NR18NRCSCENTG002 | Awarded | Southwest Soil Conservation Initiative | Mark Davis | 3/17/17 | 5/31/17 | \$650.00 | Create Claim |



Request for Reimbursement (SF-270)



What is a SF-270?

- A SF-270 standard form is a request for advance or reimbursement.
- The first tab of the **Create Claim** screen is the SF-270 claim form.

A screenshot of a web application interface titled "Create Claim CLM-2626". Below the title bar, there are three tabs: "1. SF-270", "2. Signature", and "3. Attachments". The "1. SF-270" tab is highlighted with a red rectangular border, indicating it is the active tab.



Standard Form 270 (SF-270)



- Once the **Create Claim** screen opens, the SF-270 appears.
- The SF-270 form is prepopulated with information from the agreement.

Create Claim CLM-2526

PrintSaveCancelNext >>

1. SF-2702. Signature3. Attachments

Claim information:

1a. Request for Advance or Reimbursement

- ☐ ADVANCE
- ☒ REIMBURSEMENT

1b. Type of Payment Requested:

- ☐ FINAL
- ☐ PARTIAL

2. Basis of Request

- ☐ CASH
- ☐ ACCRUAL



SF-270 Fields



- Gray fields are pre-populated from the agreement and cannot be edited.
- Grey fields could also be automatically populated later in the procedure.
- An entry can be made within white fields.

Grey Fields

Not Editable
Automatically Entered or
Not Determined Yet



White Fields

Entries Can be Made



System Required Fields

Red Asterisk by Field





Advance or Reimbursement



- Notice that, for recipients, the **Reimbursement** is highlighted and cannot be changed.
- If you need an **Advance**, contact your agency and they can help you request it.

Create Claim CLM-2526 Print Save Cancel Next >>

1. SF-270 2. Signature 3. Attachments

Claim information:

| | | |
|--|--------------------------------|-------------------------------|
| 1a. Request for Advance or Reimbursement | 1b. Type of Payment Requested: | 2. Basis of Request |
| <input type="radio"/> ADVANCE | <input type="radio"/> FINAL | <input type="radio"/> CASH |
| <input checked="" type="radio"/> REIMBURSEMENT | <input type="radio"/> PARTIAL | <input type="radio"/> ACCRUAL |



Type of Payment Requested



- For the required field **1b. Type of Payment Requested**, select either **Final** or **Partial**
- **Final** is the last payment for the program, when it has ended.
- **Partial** is when funds are requested during the program, while in progress.

Create Claim CLM-2526 Print Save Cancel Next >>

1. SF-270 2. Signature 3. Attachments

Claim Information:

| | | |
|--|--------------------------------|-------------------------------|
| 1a. Request for Advance or Reimbursement | 1b. Type of Payment Requested: | 2. Basis of Request |
| <input type="radio"/> ADVANCE | <input type="radio"/> FINAL | <input type="radio"/> CASH |
| <input checked="" type="radio"/> REIMBURSEMENT | <input type="radio"/> PARTIAL | <input type="radio"/> ACCRUAL |



Accounting Basis



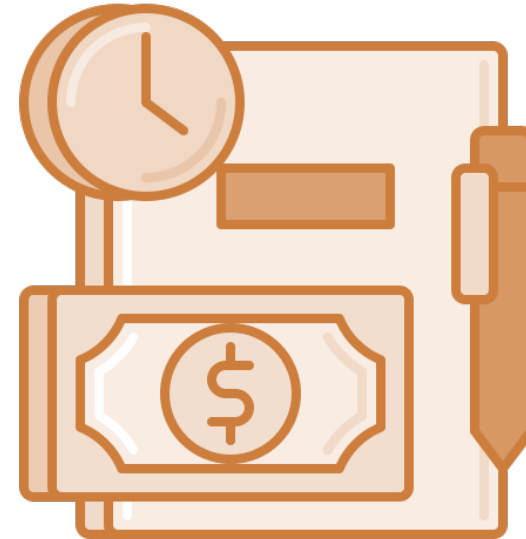
There are two options for the accounting basis.

Accruals (Transaction Occurs)

- Records revenue or expenses when a transaction occurs.
- Not when payment is received or made.

Cash (When Cash Received)

- Revenues and expenses recorded when cash received or paid and not incurred.





Cash or Accrual



In **Box 2 Basis of Request**, select either **Cash** or **Accrual**.

Create Claim CLM-2526

Print

Save

1. SF-270

2. Signature

3. Attachments

Claim Information:

1a. Request for Advance or Reimbursement

☐ ADVANCE

☒ REIMBURSEMENT

1b. Type of Payment Requested:

☐ FINAL

☐ PARTIAL

2. Basis of Request

☐ CASH

☐ ACCRUAL



Period Covered by This Request



- In **Box 8 Period Covered by This Request**, enter **From** and **To** fields.
- These dates must fall within the Period of Performance (POP) dates for agreement.
- Click **Calendar** icon in each date field.
- Or type the date in the following format: MM/DD/YYYY.

Create Claim CLM-2526

4. Federal Grant or Other Identifying Number Assigned by Federal Agency
NR18NRCSCENTG002

5. Partial Payment Request Number for this Request
N/A

6. Employer Identification
N/A

8. Period Covered By This Request

* From

8/1/2019

* To

M/d/yyyy

Aug 2019

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| 28 | 29 | 30 | 31 | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |

Today Close



Cost Elements



- Cost elements describe the type of expense.
- They are tied to G/L accounts within the system.
- The list of cost elements vary depending on the agreement.
- Some agencies put all balances in **Other**.
- However, you should list expenses in their appropriate category.

| Cost Element |
|-----------------|
| Personnel |
| Supplies |
| Construction |
| Fringe Benefits |
| Equipment |
| Contractual |
| Other |
| Indirect Cost |
| Total |



Direct and Indirect Requested Amounts



1. Enter requested amounts in **Direct Requested Amount** and **Indirect Requested Amount** columns.
2. Enter values for each **Cost Element** row for the claim.

| 14. Requested Amounts by Cost Element | | | | | |
|---------------------------------------|------------------|--------------|-------------------------|---------------------------|------------------------|
| Cost Element | Disbursed Amount | Open Balance | Direct Requested Amount | Indirect Requested Amount | Total Requested Amount |
| Personnel | \$0.00 | \$0.00 | \$ | \$ | \$0.00 |
| Supplies | \$0.00 | \$0.00 | \$ | \$ | \$0.00 |
| Construction | \$0.00 | \$0.00 | \$ | \$ | \$0.00 |
| Fringe Benefits | \$0.00 | \$0.00 | \$ | \$ | \$0.00 |
| Equipment | \$0.00 | \$0.00 | \$ | \$ | \$0.00 |
| Contractual | \$3.00 | \$1,059.00 | \$ 500.00 | \$ | \$500.00 |
| Other | \$0.00 | \$0.00 | \$ | \$ | \$0.00 |
| Indirect Cost | \$0.00 | \$240.00 | | \$ | \$0.00 |
| Total | \$3.00 | \$1,299.00 | \$500.00 | \$0.00 | \$500.00 |

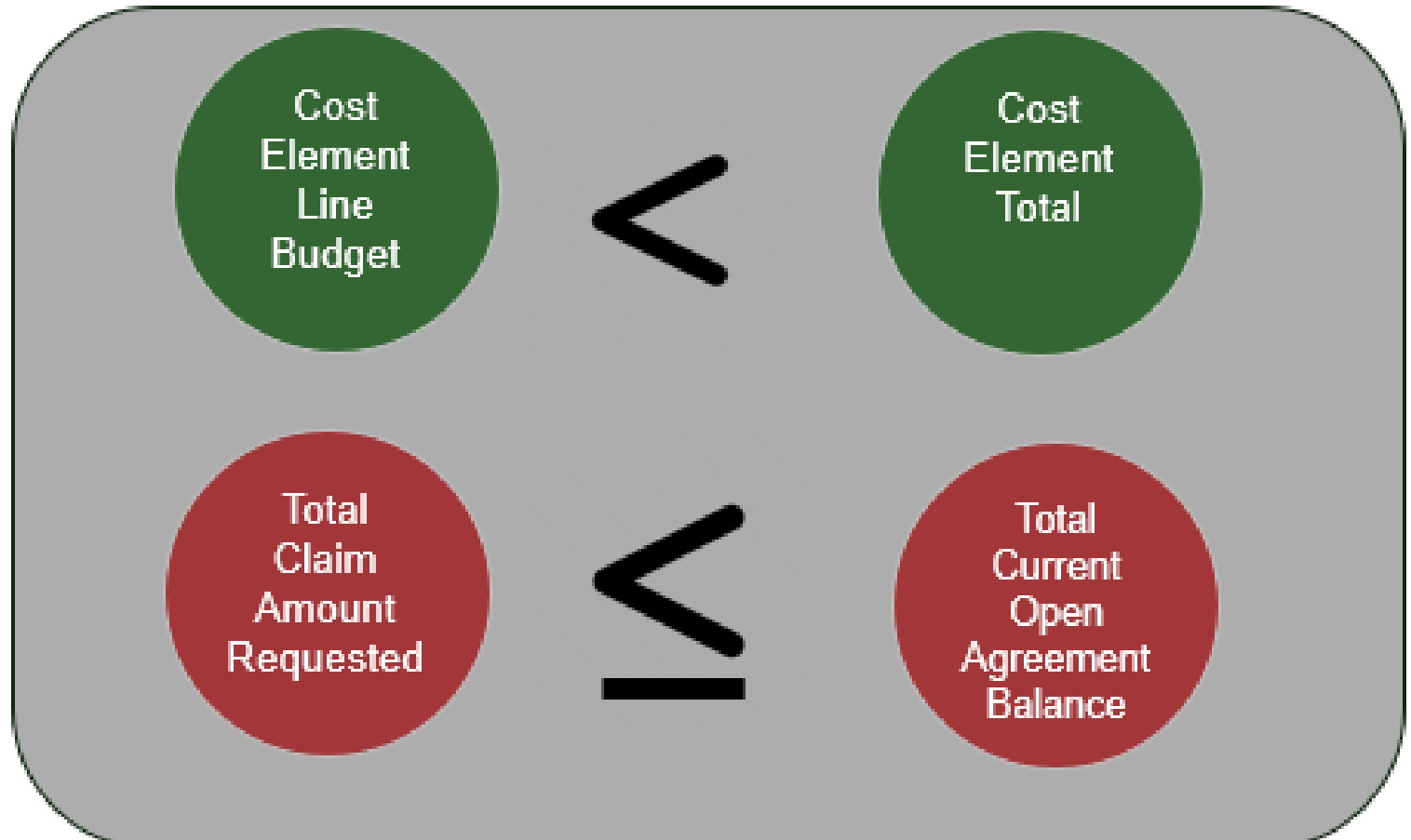


Budget Amounts



The amount requested for an individual cost element **can** exceed the budgeted amount allocated to that line.

However, total amount requested for the entire claim **cannot** exceed the total current open balance on the agreement.





Review and Confirm



1. Confirm all dollar amounts are entered.
2. Click **Next** at the top of screen.

Create Claim CLM-14168

PrintSaveWithdrawCloseNext >>

14. Requested Amounts by Cost Element

| Cost Element | Disbursed Amount | Open Balance | Direct Requested Amount | Indirect Requested Amount | Total Requested Amount |
|--------------|------------------|--------------|-------------------------|---------------------------|------------------------|
| Personnel | \$0.00 | \$0.00 | \$ | \$ | \$0.00 |
| Supplies | \$0.00 | \$0.00 | \$500.00 | \$ | \$500.00 |



Second Claim Stage: Signature



Second Stage

- The second step of claim creation is signature stage.

Primary Certifying Official

- A primary certifying official must be selected for Claim in the **Primary Certifying Official** field.

2nd Certifying Official

- A secondary certifying official can also be added.

Certifying Official Eligibility

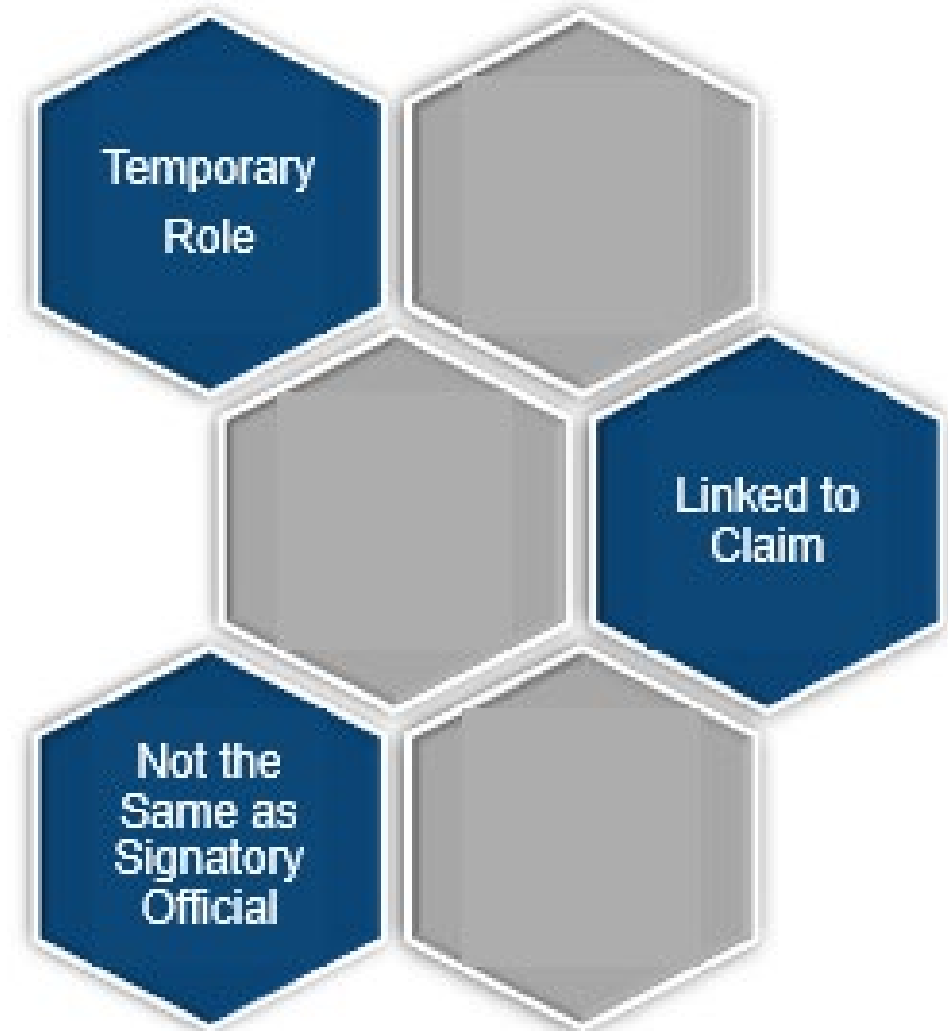
- Any user can be a Certifying Official, regardless of her/his permanent role.



Certifying Official Overview (1 of 2)



- Certifying Official (CO) is a temporarily assigned role.
- In contrast, the Signatory Official (SO) role is a permanent user role.
- CO role is linked to one specific business object (such as a claim).
- CO assignment is not the same as the SO user role for an organization.





Certifying Official Overview (2 of 2)



- Assigning at least one **Primary Certifying Official** is required.
- This can be yourself or any other user with ezFedGrants access in the organization.
- All assigned COs need to sign off prior to a claim being submitted to the agency

Create Claim CLM-2531 Print Save Cancel < Previous Next >

✓ 1. SF-270 2. Signature 3. Attachments

Signature

Select a Certifying Official by typing their name into the appropriate field. As you type, a list of matching names will appear below the field (you may need to press the down arrow on your keyboard to display the list). Click the appropriate Certifying Official's name when it appears on the list of matches. Please note that the user must be registered in ezFedGrants. You can select yourself as the Certifying Official.

A Primary Certifying Official must be selected. The Secondary Certifying Official is optional. Notifications and work items will be sent to each Certifying Official selected here.

• Primary Certifying Official

Geoffrey Chaucer Clear

Secondary Certifying Official

g Clear



Select a Primary Certifying Official



1. Begin typing username of the individual to assign.
2. System generates a list of suggested usernames as the field is entered.
3. Click username in the list when the relevant username displays.

Create Claim CLM-2531 Print Save Cancel < Previous Next >

✓ 1. SF-270 2. Signature 3. Attachments

Signature

Select a Certifying Official by typing their name into the appropriate field. As you type, a list of matching names will appear below the field (you may need to press the down arrow on your keyboard to display the list). Click the appropriate Certifying Official's name when it appears on the list of matches. Please note that the user must be registered in eSFedGrants. You can select yourself as the Certifying Official.

A Primary Certifying Official must be selected. The Secondary Certifying Official is optional. Notifications and work items will be sent to each Certifying Official selected here.

| | |
|---|---|
| Primary Certifying Official | Secondary Certifying Official |
| <input type="text" value="Geoffrey Chaucer"/> <input type="button" value="Q"/> <input type="button" value="Clear"/> | <input type="text" value=""/> <input type="button" value="Q"/> <input type="button" value="Clear"/> |

Note: For a full list of all users available to sign, click the magnifying glass or **Search** icon.



Creating Claims Signature Stage Complete



- Click the **Next >>** button to advance.
- Located at top right-hand side of screen.

Create Claim CLM-2531

Print

Save

Cancel

<< Previous

Next >>

✓ 1. SF-270

2. Signature

3. Attachments

Signature

Select a Certifying Official by typing their name into the appropriate field. As you type, a list of matching names will appear below the field (you may need to press the down arrow on your keyboard to display the list). Click the appropriate Certifying Official's name when it appears on the list of matches. Please note that the user must be registered in ezFedGrants. You can select yourself as the Certifying Official.



Third Claim Stage - Attachments



- Stage three, the final stage of claim creation, is the attachments stage.
- Attachments are not system required when submitting a claim.
- However, an organization or awarding agency may require attachments with a claim.

Create Claim CLM-2531

Print Save Cancel < Previous Submit

✓ 1. SF-270 ✓ 2. Signature **3. Attachments**

List of Attached Files

| Title | File | Operator | Date/Time | Delete? |
|----------------|------|----------|-----------|---------|
| No attachments | | | | |

[Click Here to Attach Files](#)



Attachments



To add an attachment:

1. Select **Click Here to Attach Files** link within **List of Attached Files** section.
2. The **Add Attachment** window opens.



Create Claim CLM-2531

✓ 1. SF-270

✓ 2. Signature

3. Attachments

List of Attached Files

| Title | File | Operator |
|--|------|----------|
| No attachments | | |
| Click Here to Attach Files | | |



Adding Attachments



On **Add Attachment** window:

1. Enter attachment name in the **Other Attachment Title** field.
2. Click **Choose File** to locate the file on the computer.
3. Select the file.
4. Click **Open**.
5. Click **OK** to upload.

The screenshot shows the 'Add Attachment' dialog box. It has a title bar with a close button. Inside, there's a 'Title:' label with a dropdown menu currently set to 'Other'. Below this is a text input field labeled 'Other Attachment Title', which is highlighted with a red box. Further down, there's a section for 'Upload PDF Document From Local Hard Disk' with a 'Choose File' button highlighted by a red box. Below the button are several instructions: 'PDF documents only', 'Please do not attach digitally signed documents.', 'Please do not attach fillable form documents.', 'Please do not attach password-encrypted documents.', and a paragraph about invalid pdf, digital signature, password-encrypted, fillable form error messages. At the bottom right, there are 'OK' and 'Cancel' buttons, with the 'OK' button highlighted by a red box.



Attachment Requirements



- Attachments must be in PDF format.
- Attachments must be less than 10 MB per file.
- All files may not exceed 20 MB.
- Encrypted, digitally signed, and fillable form documents cannot be uploaded.

Upload PDF Document From Local Hard Disk: No file chosen

PDF documents only

Please do not attach digitally signed documents.

Please do not attach fillable form documents.

Please do not attach password-encrypted documents.

For invalid pdf, digital signature, password encrypted, fillable form error messages; create a copy of the document by printing to pdf, then attach the new document.

For Word and Excel files use 'Save as Adobe PDF'.



Attachments Stage Complete



- 1. Ensure all necessary files are attached.
- 2. Click **Submit** to send the claim for review by Certifying Official.

Submit

PrintSaveCancel< PreviousSubmit

✓ 1. SF-270 ✓ 2. Signature 3. Attachments

List of Attached Files

| Title | File | Operator | Date/Time | Delete? |
|------------------|---|---------------------|-------------------|---------|
| Budget Breakdown | C:\Users\Abael.Solomon\OneDrive | ARS ARS-ST-GL-Admin | 8/28/2019 5:14 PM | |

[Click Here to Attach Files](#)



Confirmation Message



- If claim is submitted successfully, system displays a confirmation message.
- Individuals assigned as certifying officials receive work items and notifications.
- These alert them to the new claim.

Claim (CLM-2531)

Status:
Draft Pending Signature

Claim CLM-2531 has been submitted for approval and signature to your Certifying Official.

SF-270 Signature Attachments Comments



Certifying Claims



- Once claim is submitted, it must be certified by designated Certifying Official/CO.
- The CO introduces an additional level of review prior to final submittal to USDA agency.
- The following steps detail the process that COs use to review and submit claims.





Locate Claim for Review



1. Access ezFedGrants External Portal **Home** screen.
2. Locate claim within **Actionable Items** section.
3. Note the status should be **Draft Pending Signature**.
4. Click **Case ID** link to open claim.

Home

Actionable Items

Category: Claim Organization Filter:

| Case ID | Transaction | FAIN | Status | Due Date |
|---------------------------|-------------|------------------|-------------------------|----------|
| CLM-8133 | Claim | AM17AMAXXXXXG018 | Draft | |
| CLM-15127 | Claim | AP18ACXXXXXXC004 | Draft Pending Signature | |
| CLM-4125 | Claim | Fx17FE-10613j009 | Draft Pending Signature | |



Certify Claims Review SF-270 Request for Advance or Reimbursement



- The **Claim** screen displays.
- Click tabs to review **SF-270** form and attachments.

SF-270SignatureAttachmentsComments

Claim Information:

1a. Request for Advance or Reimbursement
REIMBURSEMENT

1b. Type of Payment Requested:
FINAL

2. Basis of Request
CASH



Claim Decision



1. CO ensures the claim is reviewed in detail.
2. Click **Please select an option** to display a dropdown menu.
3. Choose **Sign and Submit, Return, or Cancel**.

Claim (CLM-2495)

Status:
Draft Pending Signature

Please Select An Option ▾

SF-270 Attachments Comments

Sign and Submit
Return
Cancel

Claim Information:

1a. Request for Advance or Reimbursement
REIMBURSEMENT



Decision Options



Sign and Submit

- Claim appears complete and correct.
- It is ready to be digitally signed and submitted to awarding agency.

Return

- Claim needs to be corrected before submission to the agency.
- Returns claim to creator for editing.

Cancel

- Claim should be discarded.
- Cancels and voids claim.

A screenshot of a web form interface. At the top, there is a blue-bordered box with the text "Please Select An Option" and a downward-pointing chevron. Below this, a dropdown menu is open, showing three options: "Sign and Submit" (highlighted with a light blue background), "Return", and "Cancel". The dropdown menu is outlined with a thick red border. In the background, the form shows a tab labeled "SF-270" which is underlined. To the right of the tab are the words "Attachments" and "Comments". Below the tab, the text "Claim Information:" is visible, followed by "1a. Request for Advance or Reimbursement" and "REIMBURSEMENT".



Legal Notice



1. Click **Sign and Submit** option.
2. Click **Legal Notice** to review and accept terms and conditions within **Legal Notice** window.

Note: Complete Signature is not available to click until Legal Notice is agreed to.

Sign and Submit

I certify that to the best of my knowledge and belief the data in this form are correct and that all outlays were made in accordance with the grant conditions or other agreement and that payment is due and has not been previously requested.

Acceptance of the terms described below upon clicking "Legal Notice" is also required.

[Legal Notice](#)

Upon your acceptance, click the "Complete Signature" button below to finish the process.

[Complete Signature](#)



Terms and Conditions



- Review and agree to the legal notice/terms and conditions.
- Acceptance of the legal notice is required to submit claim to the agency.
- If disagreeing with the legal notice, contact an agency representative.

Add Attachment

Close

that we provide to you, as well as such other documents, statements, data, records and any other communications regarding your relationship with NRCS. You acknowledge that, for your records, you are able to use Grantor to retain Electronic Communications by printing and/or downloading and saving this Agreement and any other agreements and Electronic Communications, documents, or records that you agree to using your E-Signature, including, but not limited to, application documents (such as the SF-424), agreement, request for payments (such as the SF-270), and amendment documents. You accept Electronic Communications provided via Grantor as reasonable and proper notice, for the purpose of any and all laws, rules, and regulations, except where prohibited, and agree that such electronic form fully satisfies any requirement that such communications be provided to you in writing or in a form that you may keep.

3. Paper version of Electronic Communications. You may request a paper version of an Electronic Communication. To request a paper copy of an Electronic Communication contact us at www.GrantorHelpDesk@fas.usda.gov.

4. Revocation of electronic delivery. You have the right to withdraw your consent to receive/obtain communications via Grantor at any time. You acknowledge that NRCS reserves the right to restrict or terminate your access to Grantor if you withdraw your consent to receive Electronic Communications. If you wish to withdraw your consent, contact us at www.GrantorHelpDesk@fas.usda.gov.

5. USDA Level 2 e-Authentication enrollment. Your current enrollment in USDA level 2 e-Authentication is required in order for you to obtain Grantor services. NRCS may notify you through email when an Electronic Communication pertaining to Grantor is available. NRCS may also use Grantor and email services for Electronic Communications. It is your responsibility to use Grantor and your email service provided email account regularly to check for Electronic Communications and to check for updates to this Agreement.

6. Hardware, software and operating system. You are responsible for installation, maintenance, and operation of your computer, browser and software. NRCS is not responsible for errors or failures from any malfunction of your computer, browser or software. NRCS is also not responsible for computer viruses or related problems associated with use of an online system. The following are the minimum hardware, software and operating system requirements necessary to use Grantor and receive Electronic Communications:

Processor - IBM compatible Pentium PC running Windows 2000
Memory - 4MB RAM
Disc Space - 50 MB's Free Space
Monitor - 800 x 600 resolution
Browser - Microsoft Internet Explorer 6.0 or higher
Internet access - 28.8 modem or better

7. Controlling Agreement. If this E Signature is for an Amendment to an Agreement, then the resulting Amendment supplements and/or modifies the original Agreement and any previous amendments, as applicable by the terms and conditions of the amendment. To the extent that this Amendment contains conflicting provisions, the provisions in this Amendment will control. All other obligations of the parties remain subject to the terms and conditions of the original Agreement and any previous Amendments.

To obtain electronic services and communications, indicate your consent to the terms and conditions of this Agreement by clicking on the "Complete Signature" button.

☒ I agree with the listed Terms and Conditions

OKCancel



Terms and Conditions Agreement



1. Scroll to bottom of **Legal Notice** window.
2. Click **I agree with the listed Terms and Conditions** checkbox.
3. Click **OK** to submit acceptance of the legal notice.
4. Note this closes legal notice window.

Add Attachment Close

Not for personal use only. This is not a contract document, statement, note, invoice and any other communications regarding your relationship with the U.S. Department of Agriculture (USDA). For your records, you are able to use certain USDA services to collect pertinent communications by printing and/or downloading and saving the agreement and any other agreements and Electronic Communications documents, or records that you agree to using your E-Signature, including, but not limited to, application documents (such as the IF-424), agreements, requests for payment (such as the IF-776), and attachment documents. This except Electronic Communications provided to you. Greater is responsible and proper action for the purpose of any and all laws, rules, and regulations, except where prohibited, and agree that such electronic form fully satisfies any requirement that such communications be provided to you in writing or in a form that you may keep.

1. Paper review of Electronic Communications. You may request a paper review of an Electronic Communication. To request a paper copy of an Electronic Communication contact us at www.GreaterHelpDesk@fs.usda.gov.

2. Revocation of Electronic Delivery. You have the right to withdraw your consent to receive these communications via Greater at any time. This will notify that TBCH reserves the right to restrict or terminate your access to Greater if you withdraw your consent to receive Electronic Communications. If you wish to withdraw your consent, contact us at www.GreaterHelpDesk@fs.usda.gov.

3. USDA Card 2 is Authentication required. Your current password is USDA Card 2 is Authentication is required in order for you to access Greater services. TBCH may notify you through email when an Electronic Communication pertaining to Greater is available. TBCH may also use Greater mail services for Electronic Communications. It is your responsibility to use Greater and your email service provided email account regularly to check for Electronic Communications and to check for updates to this Agreement.

4. Electronic software and operating system. You are responsible for installation, maintenance, and operation of your computer, network and software. TBCH is not responsible for virus or failure from any malfunction of your computer, network or software. TBCH is also not responsible for computer viruses or related problems associated with use of its online system. The following are the minimum hardware, software and operating system requirements necessary to use Greater and receive Electronic Communications:

Processor - 2GHz compatible Pentium PC running Windows 2000
Memory - 4GB RAM
Disk Space - 10 GB's free space
Monitor - 1024 x 768 resolution
Browser - Microsoft Internet Explorer 9.0 or higher
Internet access - 20.0 mbps or better

5. Controlling Agreement. If the E-Signature is for an Amendment to an Agreement, then the resulting Amendment supersedes and it satisfies the original Agreement and any previous amendments, as applicable by the terms and conditions of the amendments. To the extent that the Amendment contains conflicting provisions, the provisions in the Amendment will control. All other obligations of the parties remain subject to the terms and conditions of the original Agreement and any previous Amendments.

To obtain electronic services and communications, indicate your consent to the terms and conditions of this Agreement by clicking on the "Complete Signature" button.

☒ I agree with the listed Terms and Conditions

OK Cancel



Certifying Claims Sign and Submit Screen



- The **Sign and Submit** screen displays again.
- Click **Complete Signature** to finalize digital signature and submit claim to the agency.
- If submission is successful, the system displays a confirmation message.
- Another way to confirm the successful submission is by confirming the claim no longer displays within the **Actionable Items** list.

Sign and Submit

I certify that to the best of my knowledge and belief the data in this form are correct and that all outlays were made in accordance with the grant conditions or other agreement and that payment is due and has not been previously requested.

Acceptance of the terms described below upon clicking "Legal Notice" is also required.

[Legal Notice](#)

Upon your acceptance, click the "Complete Signature" button below to finish the process.

[Complete Signature](#)



Electronic Payments



Electronic payments are made to organizations' banks based on the recipient's banking information in SAM.

Recipient organizations must keep their banking up-to-date in SAM.gov.





Module Summary

Module 2 – Create and Submit Claims



You should now be able to:

- Create a claim in ezFedGrants.
- Submit a claim in ezFedGrants.



Module 3

Submit Progress Reports



Module 3 – Submit Progress Reports Objectives



After completing this module, you should be able to:

- Submit progress reports.





ezFedGrants Progress Reports Overview



- ezFedGrants (eFG) progress Reports include **Financial and Performance reports**.
- Property reports are not able to be completed in eFG, but offline.
- Financial and performance reports are **automatically** created.
- These reports display in **Actionable Items** list on the **Home** screen until they are completed.
- **All users within an organization** can complete and submit reports regardless of their primary role.





ezFedGrants Progress Reports Process



1. Reports are created either quarterly, semi-annual or annually. Frequency varies by agreement.
2. Reports have a due date for completion.
3. If a report is completed offline, the Agency approves the report within the internal ezFedGrants system.
4. Reminders to complete reports are sent to contacts and all Grants Administrative Officers (GAOs) within the organization via email.
5. Failure to complete reports on time prevents the submitting of claims.

Report Creation

Due Date

Online or Offline

Reminders

Reports are
Past Due,
Claims Cannot
be Submitted



Actionable Items



1. Access the **ezFedGrants Home** screen.
2. Go to **Actionable Items**.
3. Click **Category** dropdown to limit the list of reports.

ezFedGrants

Home

Actionable Items

Category: Report

Organization Filter



| Case ID | FAIN/Report ID | Transaction | Status | Due Date | Last Updated | POC |
|--------------------------|-------------------------------|-------------|--------------------------|----------|--------------|---|
| RPT-5488 | AM180100XXXXG006-FI-Annual-21 | Financial | Draft | 1/28/22 | 7/12/24 | Catherine Cheadle, Catherine Cheadle, Catherine Cheadle |
| RPT-5486 | AM180100XXXXG006-FI-Annual-21 | Financial | Draft Pending Signature | 1/28/22 | 6/14/24 | Catherine Cheadle, Catherine Cheadle, Catherine Cheadle |
| RPT-3280 | AM17AMAXXXXXG002-PE-SA2-2016 | Performance | Acceptance Pending Edits | 12/28/16 | 4/4/24 | |
| RPT-5484 | AM180100XXXXG006-FI-Annual-21 | Financial | Draft | 1/28/22 | 4/4/24 | Catherine Cheadle, Catherine Cheadle, Catherine Cheadle |



Sort and Filter



- Click **Due Date** column heading to sort by oldest to newest or vice versa.
- All other columns can be filtered or sorted by clicking on column arrow.

| Due Date | Last Updated  | POC  |
|----------|--|---|
| 1/28/22 | 7/12/24 | Catherine Cheadle, Catherine Cheadle, Catherine Cheadle |
| 1/28/22 | 6/14/24 | Catherine Cheadle, Catherine Cheadle, Catherine Cheadle |



Filter and Sort



- Filters and sorts for columns are temporary.
- When a user returns to the report, the column filter or sort is cleared.
- However, the filter by **Category** sticks, remains.
- When the user returns, the **Category** choice is still there!

| Actionable Items | | | | | | |
|--------------------------|-------------------------------|-------------|--------------------------|----------|--------------|---|
| Category | | | | | | |
| Report | | | | | | |
| Case ID | FAIN/Report ID | Transaction | Status | Due Date | Last Updated | POC |
| RPT-5488 | AM180100XXXXG006-FI-Annual-21 | Financial | Draft | 1/28/22 | 7/12/24 | Catherine Cheadle, Catherine Cheadle, Catherine Cheadle |
| RPT-5486 | AM180100XXXXG006-FI-Annual-21 | Financial | Draft Pending Signature | 1/28/22 | 6/14/24 | Catherine Cheadle, Catherine Cheadle, Catherine Cheadle |
| RPT-3280 | AM17AMAXXXXXG002-PE-SA2-2016 | Performance | Acceptance Pending Edits | 12/28/16 | 4/4/24 | |



Transaction Column



- The report type for each report is specified under **Transaction** column.
- The Point of Contact (**POC**) column lists individuals identified when agreement created.

| Actionable Items | | | | | | |
|--------------------------|-------------------------------|-------------|--------------------------|----------|--------------|---|
| Category | | | | | | |
| Report | | | | | | |
| Case ID | FAIN/Report ID | Transaction | Status | Due Date | Last Updated | POC |
| RPT-5488 | AM1801000000G006-FI-Annual-21 | Financial | Draft | 1/28/22 | 7/12/24 | Catherine Cheadle, Catherine Cheadle, Catherine Cheadle |
| RPT-5486 | AM1801000000G006-FI-Annual-21 | Financial | Draft Pending Signature | 1/28/22 | 6/14/24 | Catherine Cheadle, Catherine Cheadle, Catherine Cheadle |
| RPT-3280 | AM17AMA00000G002-PE-SA2-2016 | Performance | Acceptance Pending Edits | 12/28/16 | 4/4/24 | |



Case ID



1. Identify the report to submit.
2. Note the type of report within the **Transaction** column.
3. Click on **Case ID** link.

Actionable Items

Category

Report

| Case ID | FAIN/Report ID | Transaction | Status | Due Date | Last Updated | POC |
|--------------------------|-------------------------------|-------------|--------------------------|----------|--------------|---|
| RPT-5488 | AM180100XXXXG006-FI-Annual-21 | Financial | Draft | 1/28/22 | 7/12/24 | Catherine Cheadle, Catherine Cheadle, Catherine Cheadle |
| RPT-5486 | AM180100XXXXG006-FI-Annual-21 | Financial | Draft Pending Signature | 1/28/22 | 6/14/24 | Catherine Cheadle, Catherine Cheadle, Catherine Cheadle |
| RPT-3280 | AM17AMAXXXXXG002-PE-SA2-2016 | Performance | Acceptance Pending Edits | 12/28/16 | 4/4/24 | |



Save or Return to Workbasket



Save

- Click **Save** to save draft.
- For example, if not ready to submit the report.

Return to Workbasket

- Click the **Return to Workbasket** button to complete a report later.
- This allows all users in an organization access to report.

Create Report AM180100XXXXG006-FI-Annual-21 (RPT-5488)
CRM Activity ID: 0000071168 Due Date: 10/6/2022

[Return To Workbasket](#) [Print](#) [Save](#) [Close](#)

1. SF-425 2. Signature 3. Attachments

1. Federal Agency and Organizational Element to Which Report is Submitted
USDA-AMS

2. Federal Grant or Other Identifying Number Assigned by Federal Agency
AM180100XXXXG006

3. Recipient Organization (Name and complete address including zip code)
Recipient Organization Name
NATURAL RESOURCES, ALASKA DEPARTMENT OF FINANCIAL SERVICES

| | | | |
|----------------------------|--------|-------|------------|
| Number & Street | City | State | Zip |
| 400 WILLOUGHBY AVE STE 500 | JUNEAU | AK | 99801-1783 |

4a. DUNS Number
111188029

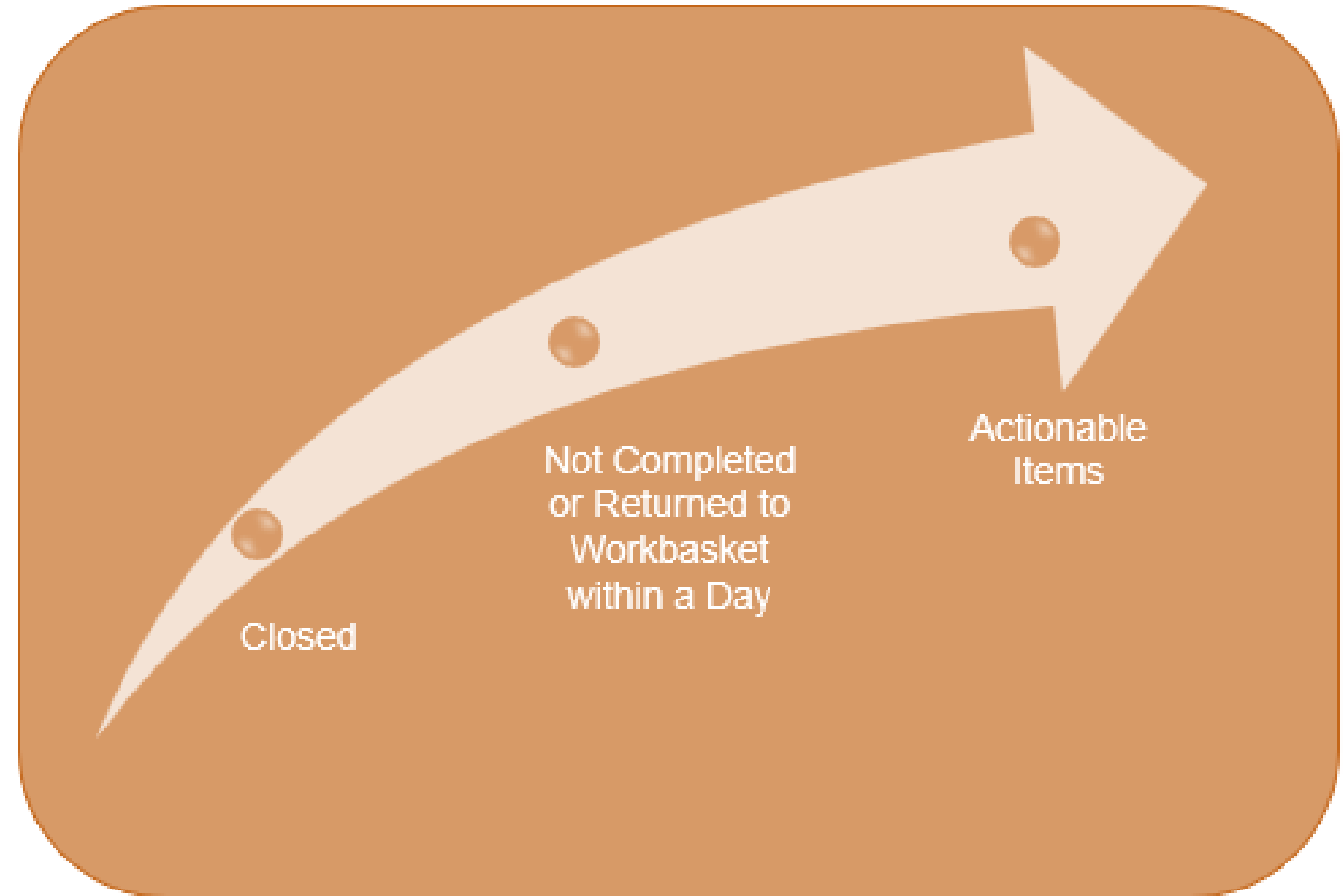
4b. EIN
Data is masked



Closing Report



1. If a report is closed without returning it to the workbasket or completing it, it is only available to the user until the next day.
2. It is automatically sent back to the workbasket, **Actionable items** section.
3. Then, the report is again available to all organizational users within **Actionable Items**.





Performance Progress Report SF-PPR



- When completing a performance report, (SF-PPR), the **Create Report** screen displays.
- The performance report completion and submittal process is **almost identical to financial** reports.

USDA ezFedGrants

Create Report AO172501X443C008-PE-Q2-19

Home

Opportunities

Applications >

Agreements

Amendments

Claims >

Reports

Repayment Requests >

Work Item Reassignment

Work and User Reports

Manage Permissions

1. SF-PPR

2. Signature

3. Attachments

1. Federal Agency and Organizational Element to Which Report is Submitted
USDA OPPE

2. Federal Grant or Other Identifying Number Assigned by Federal Agency
AO172501X443C008

3a. DUNS Number
0012345

3b. EIN (Data is Masked)

4. Recipient Organization (Name and complete address including Zip code)
Name
RUTGERS THE STATE UNIV OF NEW JERSEY 35 RESOURCE FOUNDATION SCHOOL OF AGRICULTURE
Number & Street
34 RUTGERS PLAZA
City
NEW BRUNSWICK



Box 10 Performance Narrative Steps



1. If not already provided by agency, contact agency representative for performance narrative instructions. There is not a standard template for the performance narrative.
2. Enter performance reporting information in **Box 10. Performance Narrative**.
3. Attach a performance narrative within the attachment step **if** instructed by awarding agency.



★ 10. Performance Narrative: (Attach performance narrative as instructed by the awarding Federal Agency on the Attachments tab)



Signature Stage



Click **Next** or **2. Signature** tab to proceed to **Signature** stage.

Create Report AO172501X443C008-PE-Q2-19

Print Save Close **Next >>**

1. SF-PFR **2. Signature** 3. Attachments



Signature



- **Certifying Official** is responsible for digitally signing report.
- Designate one or more **Certifying Officials** for report.
- As the name is typed, organization user options display.
- The **Secondary Certifying Official** is optional, no red asterisk.

Create Report AO172501X443C008-PE-Q2-19

Print Save Close << Previous Next >>

1. SF-PPR 2. Signature 3. Attachments

Signature

Select a Certifying Official by typing their name into the appropriate field. As you type, a list of matching names will appear below the field (you may need to press the down arrow on your keyboard to display the list). Click the appropriate Certifying Official's name when it appears on the list of matches. Please note that the user must be registered in ezFedGrants. You can select yourself as the Certifying Official.

A Primary Certifying Official must be selected. The Secondary Certifying Official is optional. Notifications and work items will be sent to each Certifying Official selected here.

* Primary Certifying Official

Secondary Certifying Official



3. Attachments



To move to final step, **3. Attachments**, use either of two navigational options:

- Click **3. Attachments**.
- Click **Next** button.

Create Report AO172501X443C008-PE-Q2-19

Print Save Close << Previous **Next >>**

1. SF-PPR 2. Signature **3. Attachments**

Signature

Select a Certifying Official by typing their name into the appropriate field. As you type, a list of matching names will appear below the field (you may need to press the down arrow on your keyboard to display the list). Click the appropriate Certifying Official's name when it appears on the list of matches. Please note that the user must be registered in ezFedGrants. You can select yourself as the Certifying Official.

A Primary Certifying Official must be selected. The Secondary Certifying Official is optional. Notifications and work items will be sent to each Certifying Official selected here.

* Primary Certifying Official Secondary Certifying Official



Attach Files



Select **Click Here to Attach Files** link.

Create Report AO172501X443C008-PE-Q2-19 Print Submit Save Close << Previous

1. SF-PPR 2. Signature 3. Attachments

List of Attached Files

| Title | File | Operator | Date/Time | Delete? |
|--|------|----------|-----------|---------|
| No attachments | | | | |
| Click Here to Attach Files | | | | |



Other Attachment Title



1. Note the **Other Attachment Title** field.
2. Enter a title.

re 3. Attachments

Add Attachment [X]

Title:
Other

*** Other Attachment Title:**
[]
Please enter a valid value

Upload PDF Document From Local Hard Disk: [Choose File] No file chosen

PDF documents only

Please do not attach digitally signed documents.

Please do not attach fillable form documents.

Please do not attach password-encrypted documents.

For invalid pdf, digital signature, password encrypted, fillable form error messages; create a copy of the document by printing to pdf, then attach the new document.

For Word and Excel files use 'Save as Adobe PDF'.

[OK] [Cancel]



Choose File



1. Click **Choose File**.
2. Select file to attach from computer.
3. Click **OK** button.
4. Repeat steps for additional attachments.

Add Attachment [X]

Title:
Other

★ Other Attachment Title:

Upload PDF Document From Local Hard Disk: No file chosen

PDF documents only

Please do not attach digitally signed documents.

Please do not attach fillable form documents.

Please do not attach password-encrypted documents.

For invalid pdf, digital signature, password encrypted, fillable form error messages; create a copy of the document by printing to pdf, then attach the new document.

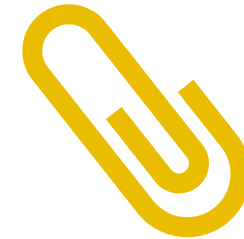
For Word and Excel files use 'Save as Adobe PDF'.



File Requirements



- Only PDFs can be attached to the report.
- Attachment size is limited to 10 MB per attachment.
- 20MB total limit for all attachments.
- No encryption or digitally signed or fillable form documents.



PDF documents only

Please do not attach digitally signed documents.

Please do not attach fillable form documents.

Please do not attach password-encrypted documents.

For invalid pdf, digital signature, password encrypted, fillable form error messages; create a copy of the document by printing to pdf, then attach the new document.

For Word and Excel files use 'Save as Adobe PDF'.



Submit



Note the **Title**, as well as who and when a file was uploaded.

Deletion is also an option.

- 1. Ensure all necessary information is complete for the report.
- 2. Click **Submit** button.

Create Report AM180100XXXXG006-FI-Annual-21 (RPT-5488)
CRM Activity ID: 0000079168 Due Date: 1/28/2023

[Return To Workbasket](#) [Print](#) [Submit](#) [Save](#) [Close](#) [<< Previous](#)

1. SF-425 2. Signature 3. Attachments

List of Attached Files

| Title | File | Operator | Date/Time | Delete | File Size |
|-------------------|------------------------------|----------|-------------------|--------|-----------|
| Supplemental Info | Attach_1.pdf | TEST GAO | 7/12/2024 3:45 PM | | 32 |

Total Attachment Size (KB) 32

[Click Here to Attach Files](#)



Confirmation Message



- After report submittal, the work item is sent to Certifying Official(s).
- Report status changes to **Draft Pending Signature**.

Performance Report(AO172501X443C008-PE-Q2-19)

PrintClose

Status:
Draft Pending Signature

Report AO172501X443C008-PE-Q2-19 has been submitted for approval and signature to your Organization's Certifying Official.

SF-PPRSignatureAttachments



Certify Progress Reports Certifying Official Process



Certifying Official uses the following steps to review.

1. Access **ezFedGrants External Portal Home** screen.
2. Locate report to review in **Actionable Items**.
3. Use **Category** field to filter work items.
4. Status should be **Draft Pending Signature**.
5. Click **Case ID** link to open report work item.

| Actionable Items | | | | | | | |
|--------------------------|-------------------------------|-------------|-------------------------|----------|--------------|---|--|
| Category Report | | | Organization Filter | | | | |
| Case ID | FAIN/Report ID | Transaction | Status | Due Date | Last Updated | POC | |
| RPT-5488 | AM180100XXXXG006-FI-Annual-21 | Financial | Draft Pending Signature | 1/28/22 | 7/12/24 | Catherine Cheadle, Catherine Cheadle, Catherine Cheadle | |
| RPT-5486 | AM180100XXXXG006-FI-Annual-21 | Financial | Draft Pending Signature | 1/28/22 | 6/14/24 | Catherine Cheadle, Catherine Cheadle, Catherine Cheadle | |



Review Sections and Decisions



1. Review each section of the report.
2. Select a decision from **Please select an option** dropdown.
3. Click **Sign and Submit** to approve report and submit to agency.
4. Click **Return** option and enter relevant comments to return the report to its creator for edits.

Note: Cancel is not an option since reports are federally required.

Financial Report (NI1612-NI00MG011-FI-SA2)
Status:
Draft Pending Signature

Please Select An Option

Report

| SF-425 | Signature | Attachments |
|--------|-----------|-------------|
| | | |

Financial Report (NI1612-NI00MG011-FI-SA2-18)
Status:
Draft Pending Signature

Please Select An Option

Report

| SF-425 | Signature | Attachments |
|--------|-----------|-------------|
| | | |

Sign and Submit
Return



Certify Progress Reports Legal Notice



Click **Legal Notice**.

Financial Report (NI1612-NI00MG011-FI-SA2-18)
Status:
Draft Pending Signature

PrintClose

Please Select An Option

Sign and Submit

Certification: By signing this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and intent set forth in the award documents. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)

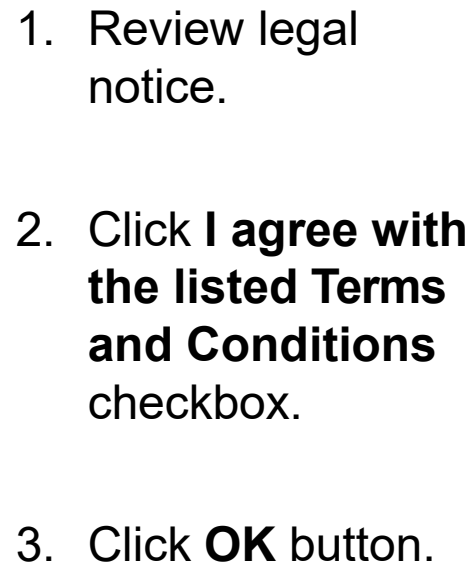
Paperwork Burden Statement

According to the Paperwork Reduction Act, as amended, no persons are required to respond to a collection of information unless it displays a valid OMB Control Number. The valid OMB control number for this information collection is 0348-0061. Public reporting burden for this collection of information is estimated to average 1.5 hours per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0060), Washington, DC 20503.

Acceptance of the terms described below upon clicking "Legal Notice" is also required.

Legal Notice

Upon your acceptance, click the "Complete Signature" button below to finish the process.

78



Certify Progress Reports Complete Signature



Click **Complete Signature** button.

Please Select An Option

Sign and Submit

Certification. By signing this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and intent set forth in the award documents. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001).

Paperwork Burden Statement

According to the Paperwork Reduction Act, as amended, no persons are required to respond to a collection of information unless it displays a valid OMB Control Number. The valid OMB control number for this information collection is 0348-0061. Public reporting burden for this collection of information is estimated to average 1.5 hours per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0060), Washington, DC 20503.

Acceptance of the terms described below upon clicking "Legal Notice" is also required.

Legal Notice

Upon your acceptance, click the "Complete Signature" button below to finish the process.

Complete Signature



Certify Progress Reports Submitted



- A confirmation page displays.
- Report is successfully signed, and the status is **Submitted** to agency.

Financial Report(NI1612-NI00MG011-FI-SA2-18)

Status:
Submitted

Report NI1612-NI00MG011-FI-SA2-18 has been signed and submitted.

SF-425 Signature Attachments



Module 3 – Submit Progress Reports Summary



You should now be able to:

- Submit progress reports.



Module 4

Course Summary



Course Summary



You should now be able to:

- Create and submit claims.
- Submit progress reports.





Getting Help



Login.gov

- For Login.gov, call (844) 875-6446. Operating hours are 24 hours a day, seven days a week.
- Login.gov: (844) 875-6446, [Login.gov FAQs](#)

ezFedGrants

- Contact the ezFedGrants Help Desk: ezFedGrants-cfo@usda.gov
- Training Schedule [eFG Training Schedule | USDA](#)
- Recipient job aids: [Job Aid Library](#)



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Course Questions and Poll

