



ezFedGrants User Roles GM 305



Version 4.0

- **Course Introduction**
- Module 1 – ezFedGrants Summary
- Module 2 – ezFedGrants User Roles
- Course Summary

- Name
- Role
- Training Purpose





Course Objectives



After completing this course, you should be able to:

- Summarize the user roles available in ezFedGrants





Agenda

Module 1 – ezFedGrants Summary



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Objectives: Module 1 – ezFedGrants Summary



After completing this module, you should be able to:

- Describe an overview of ezFedGrants
- Explain the functionality, goals and benefits of ezFedGrants



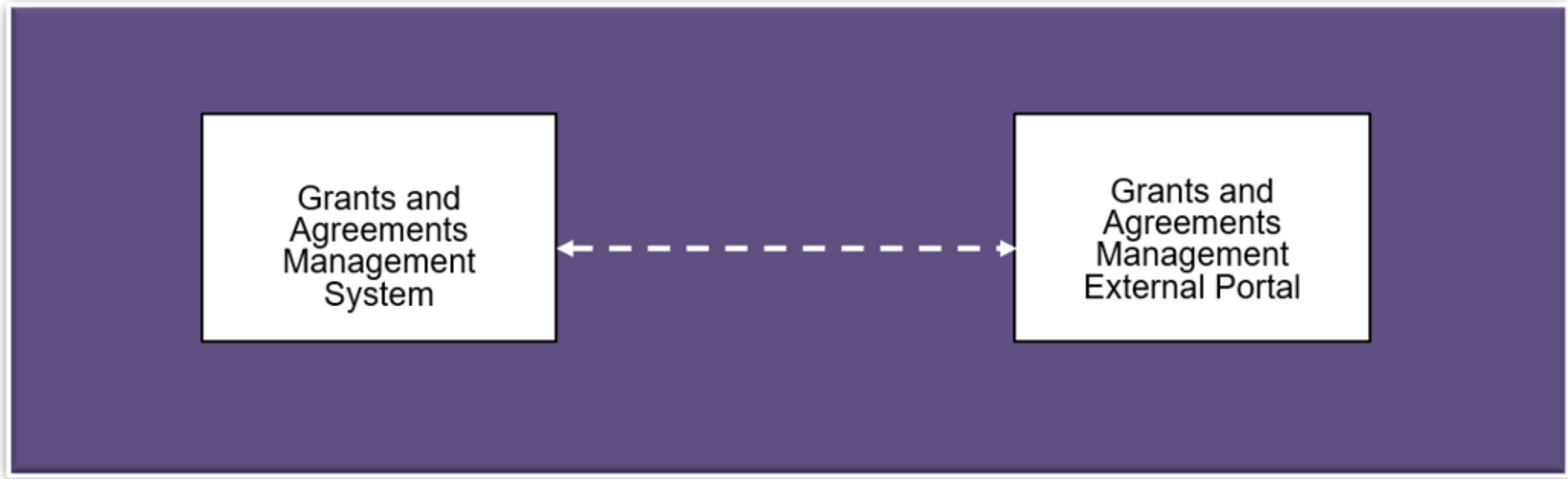


What is ezFedGrants?



USDA Agency Users








**Grants and Agreements
Partners**





Benefits of Using ezFedGrants



-  Accurate data tracking of agreements, amendments, and claims
-  Reduces the time required for grant-related operations associated with approvals and claims
-  Allows for the standardization of grant execution and management
-  Speeds up agreement processing through electronic form submittal and approval
-  Acts as a platform where USDA Agency users and Agreement Partners can communicate
-  Allows for easy access to the ezFedGrants Helpdesk
-  Decreases manual entry, reducing errors

- **Application creation and submittal:** Filling out SF-424 and 424A forms, reviewing applications, etc.
- **Approval workflows and notifications:** Receive notifications of necessary steps and approvals, with next steps automatically assigned.
- **Claims processing:** Create, review, approve, and submit claim requests.
- **Progress Reports:** Process performance and financial reports in a timely fashion through automated notifications.



ezFedGrants Role-Based System

Module 2 – ezFedGrants User Roles



Role assignment is the process of defining roles required to perform grants management business processes and mapping users to those roles

This results in the following benefits:

1. Identifies the ezFedGrants tasks, activities, and roles needed to perform business processes and **recommends assignment** to team members
2. Allows for proper **segregation of duties** and financial controls among users
3. Gives Security Administrators the ability to assign appropriate activities efficiently to designated users **avoiding degradation in service** or performance
4. Assigns ezFedGrants users the **access to perform specific tasks** within defined user roles to execute ezFedGrants business functions

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Objectives

Module 2 – ezFedGrants User Roles



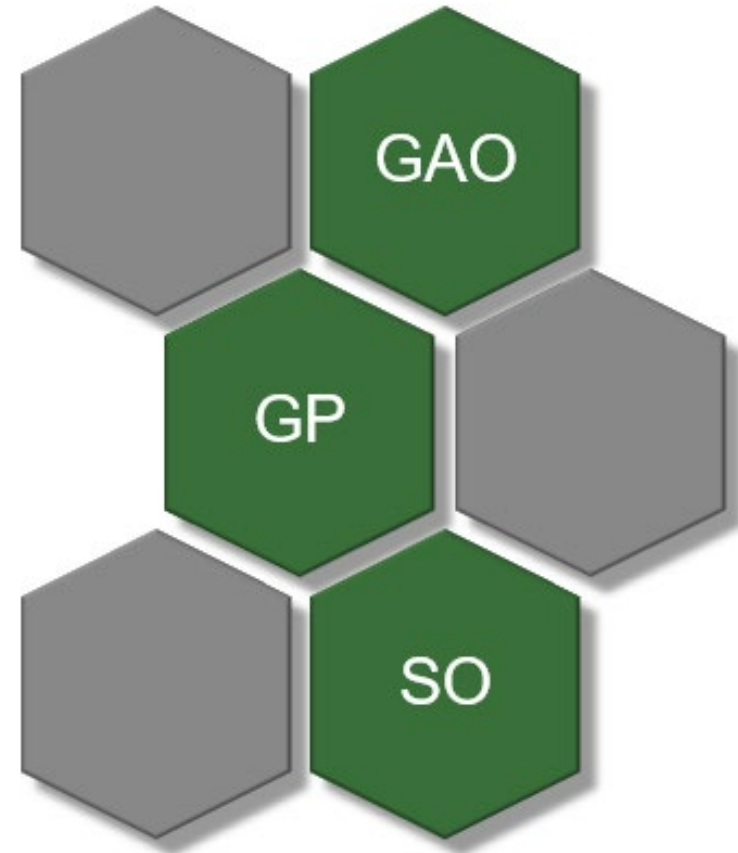
After completing this module, you should be able to:

- Explain the different roles available in ezFedGrants
- Describe the functionality available to the different ezFedGrants user roles



There are three primary roles available to ezFedGrants external portal users (grant award applicants and recipients).

- Grants Administrative Officer (GAO)
- Grants Processor (GP)
- Signatory Official (SO)

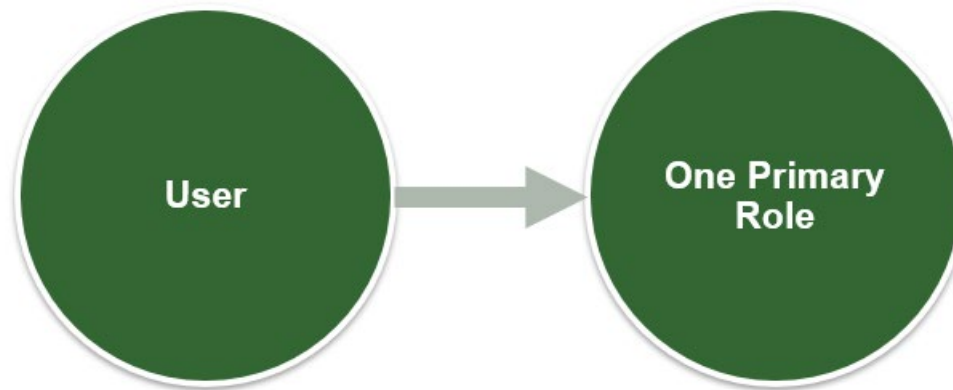




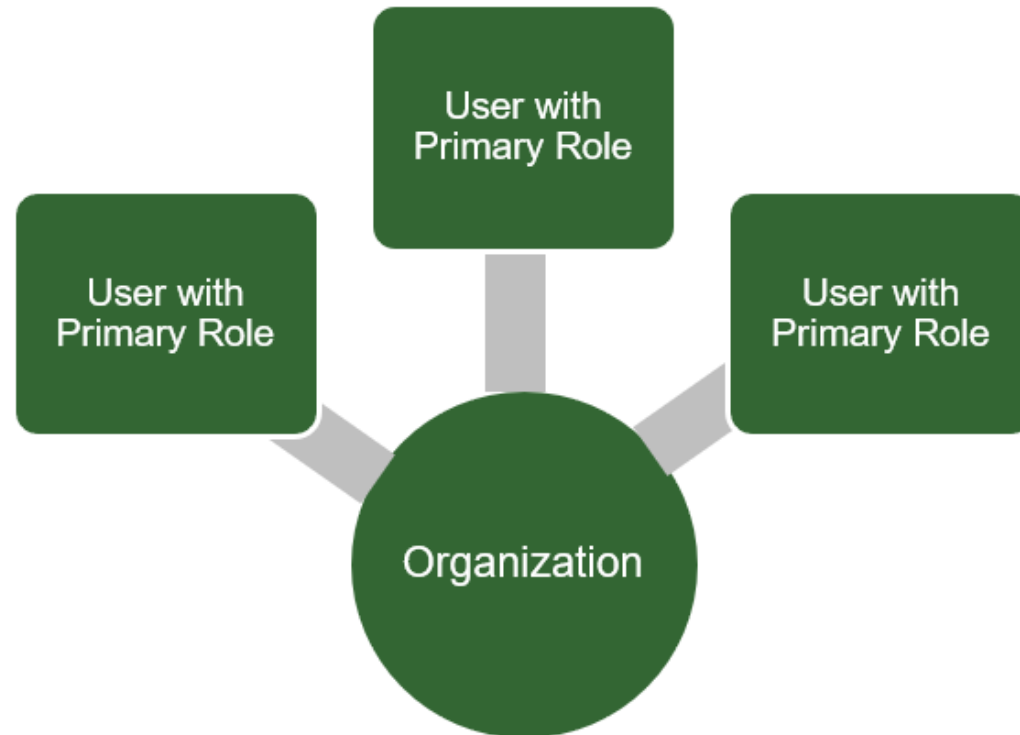
Primary Role Overview



- All users must have one primary role.
- Each user may only have one primary role assigned within the ezFedGrants system at a time.



- Each organization may have multiple users with the same primary role (For example, three GAOs, two SOs, six GPs).
- At least one GAO and one SO is required to submit applications and sign agreements.

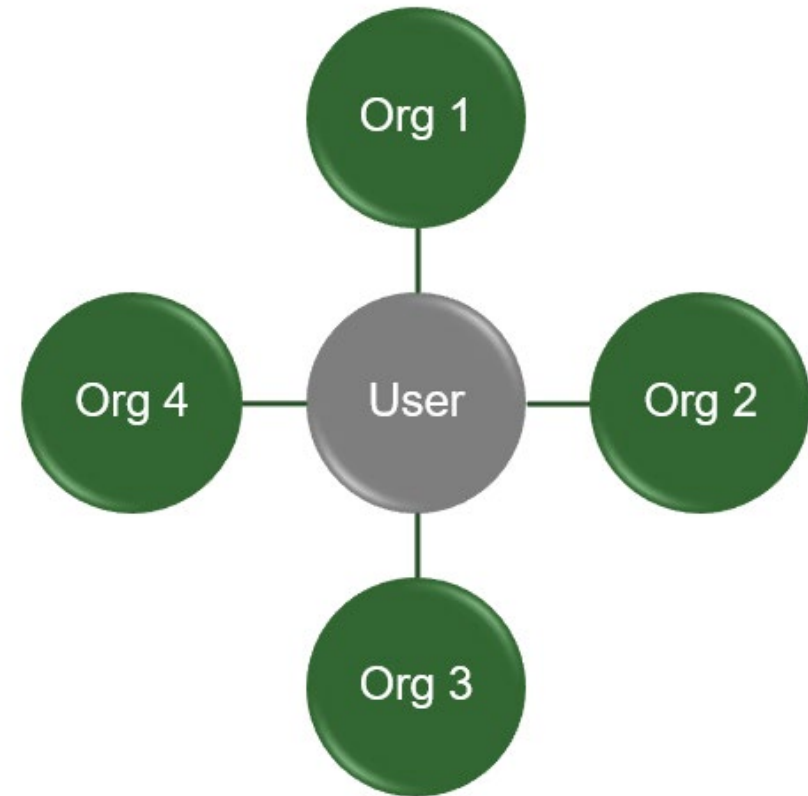




User Organization Assignment



The system allows users to be assigned more than one organization listed on their profile.





ezFedGrants Primary User Roles Overview



- **Grants Administrative Officer (GAO)**
 - Essentially the account administrator for an organization.

- **Grants Processor (GP)**
 - Helps to create Claims and submit progress reports.

- **Signatory Official (SO)**
 - Helps to review and digitally sign Applications in ezFedGrants.
 - Submit progress reports

Certifying Official (CO)

- A **temporary** role assigned on the spot and attached to a single business object within ezFedGrants.
- Helps to review and approve Claims and Reports before submittal to USDA agency.
- Anyone can be a certifying official if they have a user role within ezFedGrants for an organization.
- Introduces an additional level of review before final submission of documents to USDA agency.

- The first user for an organization **MUST** request access as a GAO.
- Users requesting the Grants Administrative Officer (GAO) role who are also the first users from their organizations to request access to the ezFedGrants Portal, have their access requests approved by their USDA Agency Grants Management Officer (AGMO).
- All subsequent user access requests, including additional GAOs, are approved by the individual assigned as GAO for that organization.
- Before a user can request access as a Grants Processor or Signatory Official, another individual from an organization must have been provisioned by the USDA agency with the Grants Administrative Officer role.

- Approve access requests, change user roles, and deactivate user access.
- View applications, opportunities, award documents, claims, and reports.
- Create claims and applications.
- Prepare and submit progress reports for agreements.
- Reassign reports, applications, and claims in pending signature status (change who is responsible for completing the work).
- Can be designated as a Certifying Official (secondary role).
- Refer to the External Portal *Role & Access Management* and *Role Assignment* job aids for more information.

- This role is similar to the GAO role.
- The primary difference being that the Grants Processor (GP) cannot:
 - Review access requests
 - Manage user roles/access
 - Reassign pending signature applications, claims or reports



- Prepare and submit progress reports for agreements within their organization.
- Create applications and claims.
- Can be designated as a Certifying Official on claims and progress reports.

- This role has a limited scope compared to the other roles.
- Each organization must have at least one Signatory Official (SO) to fully utilize the ezFedGrants External Portal.
- If an organization does not have an SO, they are not able to do the following in ezFedGrants:
 - Submit applications
 - Sign agreements
 - Sign amendment documents

- Approves application and agreement and amendments documents.
- Prepares and submits progress reports for agreements within their organization.
- Can be designated a Certifying Official on applications, claims, and reports.
- This role can be filled by the current Grantee Signatory Official.



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Today we learned about:

- The different user roles available in ezFedGrants
- Which roles can perform which activities in ezFedGrants

- Monthly FAQ Session
- Your Agency Representative
- ezFedGrants Help Desk: ezFedGrants-cfo@usda.gov
- For eAuthentication issues including password resets, contact the eAuthentication helpdesk at <https://www.eauth.usda.gov/eauth/b/usda/helpdesk>.





Questions?

