



# ezFedGrants Overview and Basic Navigation

GM 306



# **Module 1**

## **Course Introduction**



# Agenda



- Module 1 – Course Introduction
- Module 2 – ezFedGrants Overview
- Module 3 – ezFedGrants External Portal
- Module 4 – Course Summary





# Course Overview



- The purpose of this course is to provide an overview of the ezFedGrants system and External Portal.
- 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](mailto:ezFedGrants-cfo@usda.gov).
- [eFG Training Schedule](#)
- Attend a Frequently Asked Questions (FAQ) session.
- Recipient job aids: [Job Aid Library](#)



Bookmark or favorite these links!

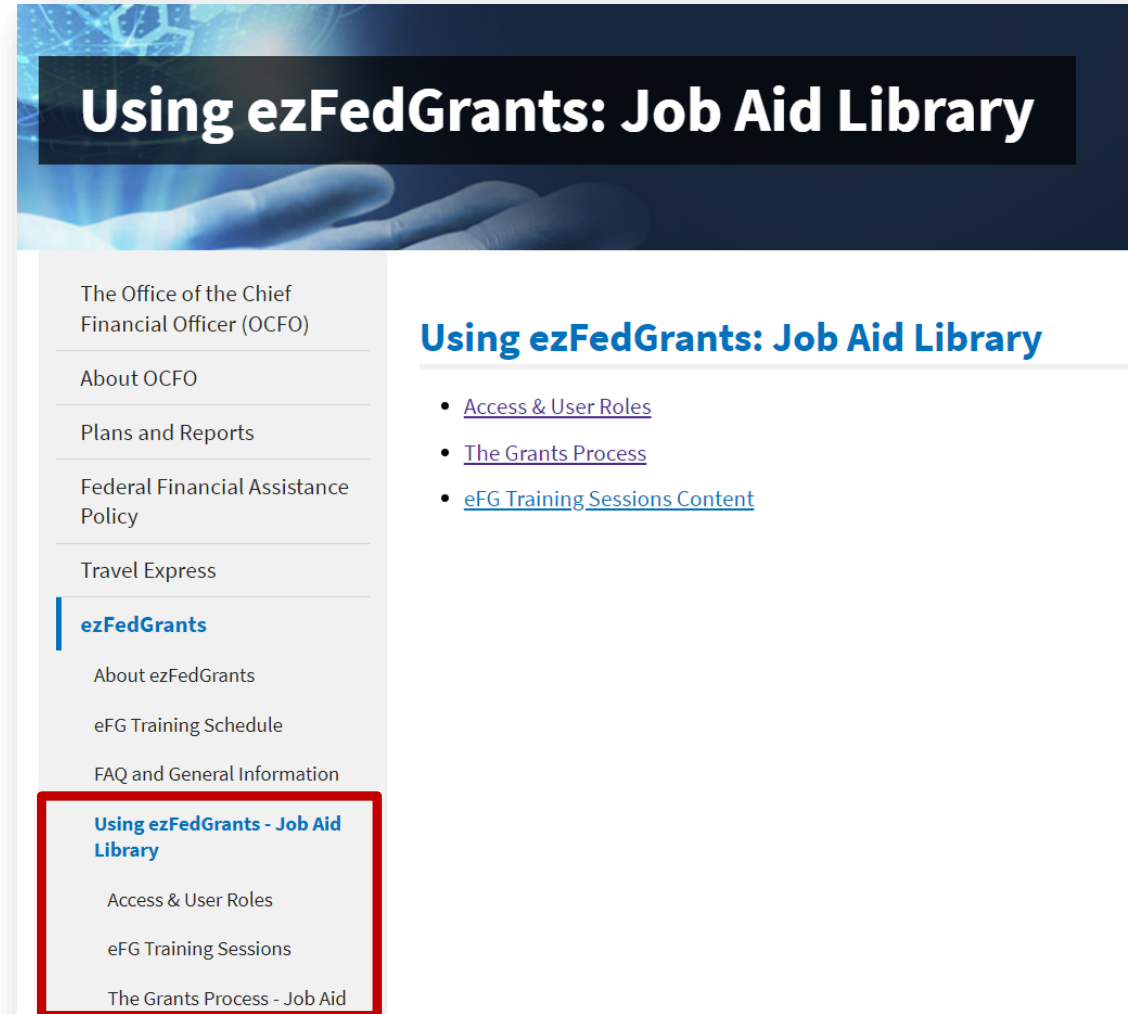




# Job Aid Library



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



# **Module 2**

## **ezFedGrants Overview**



## Module 2 – ezFedGrants Overview Objectives



After completing this module, you should be able to:

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



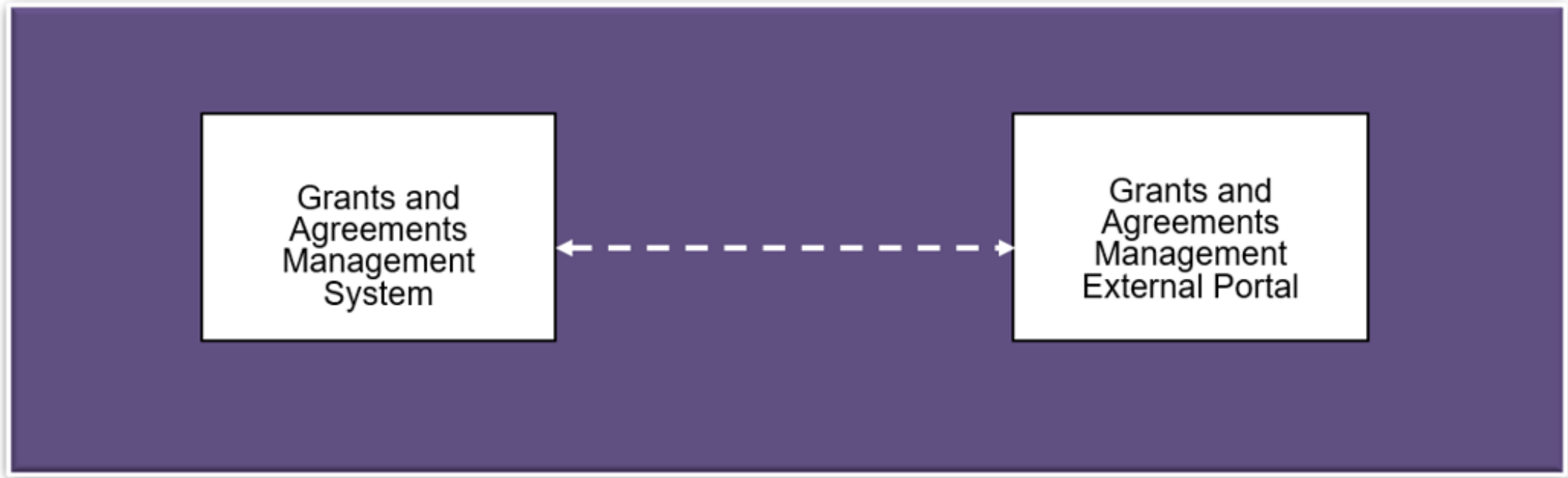


# What is ezFedGrants?



**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 processing through electronic form submittal and approval
- Acts as a platform where USDA Agency users and Agreement Partners can communicate
- Uses an auto-fill feature, reducing errors



# Grants Management Lifecycle



- eFG supports the full grants management lifecycle.
- This includes:
  - Searching for opportunities
  - Creating and submitting applications to opportunities
  - Managing agreements, including amendments
  - Submitting claims and reports
  - Closing out agreements

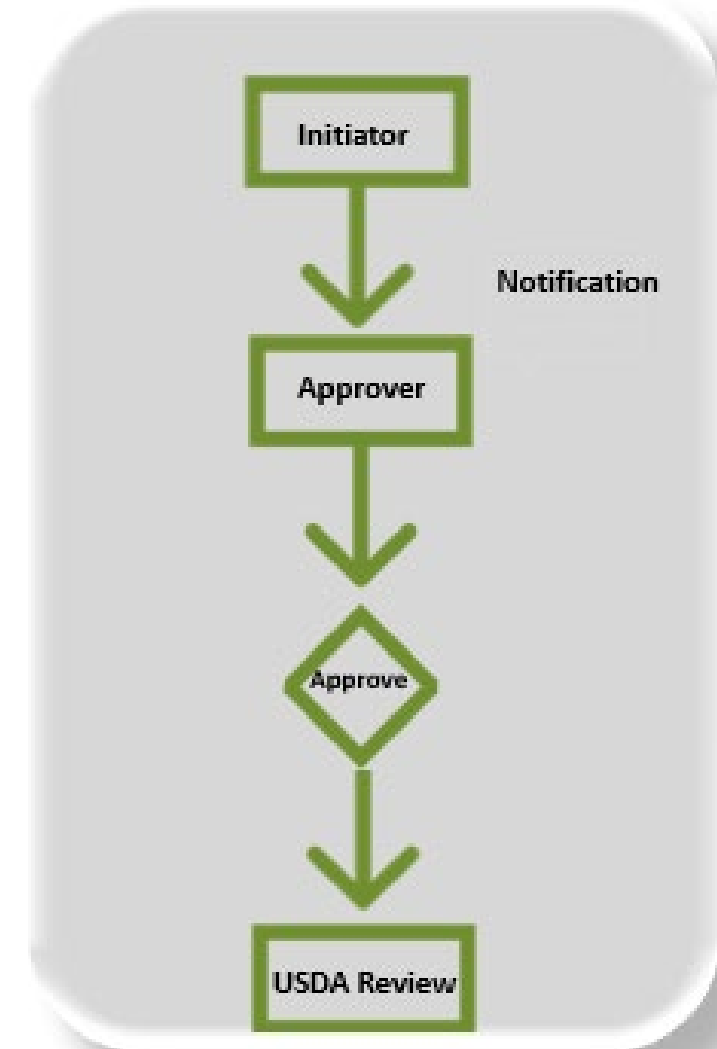




# Approval Workflows and Notifications



- ezFedGrants uses workflow functionality to streamline the approval process.
- Workflow automatically sends an email and Portal notification to users within the approval process.
- The system sends notifications to the next assigned user within the recipient organization or USDA agency.

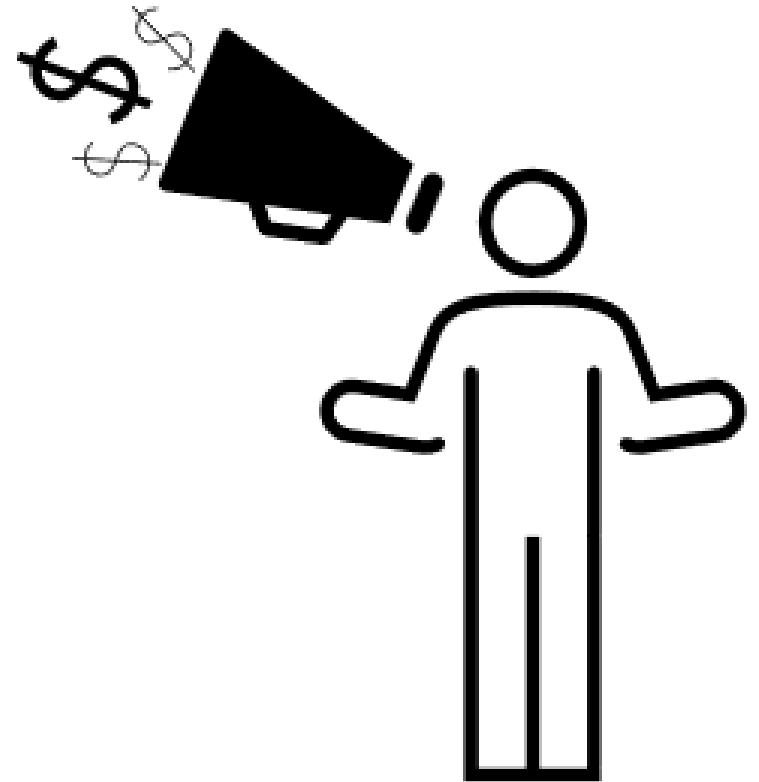




# Opportunities



- Notice of Funding Opportunity Announcements (referred to as **NOFO** or **Opportunities**) publicly announce the availability of certain types of funding.
- Opportunities are published by USDA agencies in either ezFedGrants or on Grants.gov.
- Once an Opportunity is published, any external organization that would like to be considered for funding applies using either ezFedGrants or Grants.gov.



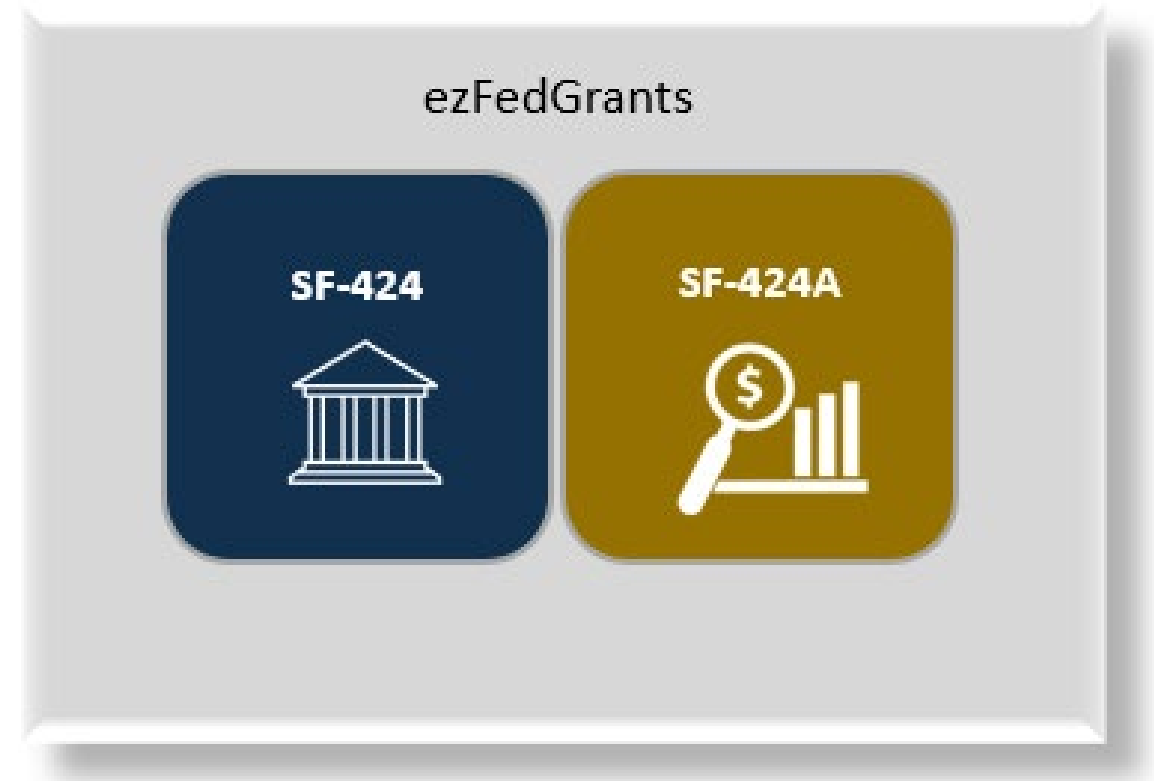




# Applications



- Applications are based on opportunities published by USDA agencies.
- Application forms are built into the ezFedGrants system for electronic submission.
- Standard Form-424 (SF-424) is an application used by federal agencies for grant applications.
- The SF-424A Budget Information - Non-construction Programs form is also available to complete in the system.





# Claims Processing



- ezFedGrants supports the claim process.
  - This includes creation, review, and approval of claim requests using funds from grant agreements.
- Advance claim and repayment requests are not supported in ezFedGrants and should be requested directly through the awarding agency.





# Progress Reports



- ezFedGrants supports the submission of performance and financial progress reports.
- Report requirements and deadlines are specified in the Agreement.
- Recipients are automatically notified within the **Actionable Items** section on the **Home** screen when a report is due.
- Property reports are not supported in ezFedGrants, and instructions should be requested directly through the awarding agency.





## Module 2 – ezFedGrants Overview Summary



You should now be able to:

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



# **Module 3**

## **ezFedGrants External Portal**



## Module 3 – ezFedGrants External Portal Objectives



After completing this module, you should be able to:

- Explain how to navigate within the eFG External Portal.





# ezFedGrants External Portal Home Page Dashboard



USDA egFedGrants

Header

Test Tester 3

Home

Opportunities

Applications >

Agreements

Amendments

Claims >

Reports

Work Item Reassignment

Work and User Reports

Manage Permissions

Contact USDA

Training/Guidance

Home

News and Notes

Test External 11/17/22 6:12 PM

Actionable Items

My Agreements

Notifications

Applications under Review

Amendments under Review

Claims under Review

Work Area

Navigation Menu



# ezFedGrants External Portal Home Page Descriptions



Section	Description
Header	Includes user's name and a link to profile details
Navigation Menu	<p>Navigate to Home, and view or search for Opportunities, Applications, Agreements, Amendments, Claims, and Reports</p> <p>Quick links: Contact USDA (ezFedGrants Help Desk) and Training/Guidance to ezFedGrants website</p> <p>Note: Work Item Reassignment, Work and User Reports, and Manage Permissions are only visible for Grants Administrative Officers (GAO)</p>
Work Area	Expand or collapse each section to view News and Notes, Actionable Items, My Agreements, Notifications, Applications Under Review, Amendments Under Review, Claims Under Review





# ezFedGrants External Portal Work Area Descriptions



Tile	Displays
<b>News and Notes</b>	Messages broadcasted about functionality updates, system outages, announcements or policy changes.
<b>Actionable Items</b>	List of transactions to be acted upon.
<b>My Agreements</b>	Provides a listing of all the organization's agreements.
<b>Notifications</b>	Displays list of messages for specific user related to status of Transactions, such as Claims and Applications.
<b>Application under Review</b>	Applications under review.
<b>Amendments under Review</b>	Amendments under review.
<b>Claims under Review</b>	Claims under review or awaiting Certifying Official signature.



# ezFedGrants Home Page - Work Area

## Actionable Items



- Actionable Items are viewed in a list format.
- Items can be filtered by **Category** or by clicking the triangle icon in each column.

▼ Actionable Items

Category

Application

Claim

Role Assignment Request

Report

Electronic Signature - Amendment

Electronic Signature - Agreement

Application

Claim

☒ Financial

Report

Performance

Report

Apply

Cancel

Transaction	FAIN/ID	Status	Due Date	Last Updated
	FX170200-10.C001-FI-Q2-19	Draft	7/30/19	2/14/25
	AP17ACXXXXXXE002-FI-Q2-21	Acceptance Pending Edits	6/24/21	2/14/25
	FX170200-10.C001-FI-Q3-21	Draft	7/9/21	2/14/25
	NR179104CALIC007-PE-Q4-21	Not started	8/11/21	2/14/25
	NR187217XXXXC007-FI-Final-21	Not started	12/15/21	2/14/25
	NR173A750001G023-FI-Q4-20	Acceptance Pending Edits	10/2/20	2/14/25
		Draft		2/13/25



# ezFedGrants Home Page - Work Area

## My Agreements



All Agreements for your organization will be visible to all users within the organization.

Perform the following **Actions** using a direct link:

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

Home

News and Notes

Test External

11/17/22 6:12 PM

Actionable Items

My Agreements

FAIN	Status	Project Title	Recipient Contact Name	Period of Performance		Total Federal Award Amount	Actions
<a href="#">AP18ACXXXXXG003</a>	Awarded	Test Cancelled Fund Validation	Patrick Rhodey 04	10/2/17	12/31/50	\$8,005.00	<a href="#">I want to</a> View Agreement Details
<a href="#">NR183A750001C006</a>	Awarded	O&M Test Claim document Postings - PC	Patrick Rhodey 04	10/26/17	3/31/19	\$19,500.00	<a href="#">I want to</a> View Amendments
<a href="#">AM180200-10.G002</a>	Awarded	Test Agreement	sig off1001	7/19/18	6/2/19	\$5.00	<a href="#">I want to</a> View Federal Award Document
<a href="#">NI18RREAFXXG002</a>	Awarded	Test ASAP 12	TEST GAO	9/28/18	9/30/99	\$13,471,543.00	<a href="#">I want to</a> View Claims
<a href="#">NI18RREAFXXG001</a>	Awarded	Test ASAP 13	Sig Off	9/28/18	9/30/99	\$1,053,814.00	<a href="#">I want to</a> Create Claim
<a href="#">NR199104CALIG002</a>	Awarded	Test NRCS Claim	GAO1 GAO1	10/8/18	7/31/25	\$25,000.00	<a href="#">I want to</a> View Reports
<a href="#">AO192501X443G001</a>	Awarded	NRCS Regression Testing for OAO	GAO1 GAO1	10/17/18	10/31/25	\$10,000.00	<a href="#">I want to</a>
<a href="#">AP19ACXXXXXE001</a>	Awarded	Testing Alt.NICRA Rate	Patrick Rhodey 05	2/19/19	5/24/22	\$471.00	<a href="#">I want to</a>
<a href="#">AP19PPQCPHSTY002</a>	Awarded	Defect Testing 02/21/2019	ARS ARS-ST-GL-Admin	2/21/19	12/31/99	\$200.00	<a href="#">I want to</a>



# ezFedGrants Home Page - Work Area Notifications



**View Message** related to listed notification.

Home

▼ News and Notes

Test External

11/17/22 6:12 PM

> Actionable Items

> My Agreements

▼ Notifications

Transaction ▼	Transaction ID ▼	Status ▼	Sent ▼		Viewed ▼
Claim	CLM-12157	Accepted for Payment Processing	11/25/24	<a href="#">View Message</a>	✓
Claim	CLM-12156	Accepted for Payment Processing	11/25/24	<a href="#">View Message</a>	✉
Claim	CLM-12154	Accepted for Payment Processing	11/25/24	<a href="#">View Message</a>	✉
Claim	CLM-12155	Accepted for Payment Processing	11/25/24	<a href="#">View Message</a>	✉
Application	APP-20995	Approved	11/22/24	<a href="#">View Message</a>	✉
Application	APP-20995	Accepted/Recommended	11/22/24	<a href="#">View Message</a>	✉
Application	APP-20995	Considered	11/22/24	<a href="#">View Message</a>	✉



## Editing Fields



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

### Gray Fields

Not Editable  
Automatically Entered or  
Not Determined Yet



### White Fields

Entries Can be Made



### System Required Fields

Red Asterisk by Field





# Search Criteria Example (Agreements) External Portal



## Performance Start Date

### Organization Name

Project Title  
Organization  
City  
State  
Postal Code  
Country)

### Primary POC Name

First Name  
Last Name  
Email Address

### Agreement Title

Organization name associated with Agreement

## Performance End Date

### Status

Executed  
Awaiting Grantee Acceptance  
Pending Budget Execution  
Pending Closeout  
Suspended  
Closed

**Search Criteria** options vary based on the search screen.

Search results can be sorted and filtered in the same way as the **Actionable Items** list.



# Digital Signature Decision Dropdown



- Another navigational feature is the ability to sign electronically.
- Signatory Officials review and approve applications and amendments.
- Certifying Officials review and approve claims and award documents.
- Decision dropdown options vary based on the transaction being reviewed.

A screenshot of a web application interface. At the top, there is a blue-bordered box containing the text "Please Select An Option" followed by 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 "Withdraw". The dropdown menu is outlined with a red border. In the background, the text "SF-424" and "Application" are visible, along with a blue horizontal line.



# Summary

## Module 3 – ezFedGrants External Portal



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- [eFG Training Schedule](#)
- Attend a Frequently Asked Questions (FAQ) session.
- Recipient job aids: [Job Aid Library](#)



Bookmark or favorite these links!



# ezFedGrants Overview Poll & Questions

