



# Review ezFedGrants Access Request

## Job Aid

### Purpose

This document describes how users with the Grants Administrative Officer role review ezFedGrants access requests from other users in their organization.

### 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), 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/Login.gov Verified Identity Account Account
- The Grants Administrative Officer (GAO) role in ezFedGrants
- An access request awaiting your review

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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.



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#### Getting Started

1. Launch the ezFedGrants External Portal (from the [OCFO ezFedGrants website](#)) and log in with your Login.gov verified identity account. Account.

**Note:** For questions regarding ezFedGrants access, including logging-in and eAuthentication, please review the [eAuthentication/Login.gov FAQs general](#).

2. Locate the access request you want to review in the **Actionable Items** section of the **ezFedGrants External Portal Home** screen. Click the **Transaction ID** link to open the access request work item.

**Note:** If you have a lot of work items, use the **Category** field to filter your work items.

The screenshot shows the USDA ezFedGrants Home page. On the left is a navigation menu with items like Home, Opportunities, Applications, Agreements, Amendments, Claims, Reports, Repayment Requests, Work Item Reassignment, Work and User Reports, and Manage Permissions. The main content area is titled 'Home' and contains a 'News and Notes' section with a 'Sample Post 1' dated 8/21/19 10:06 AM. Below that is the 'Actionable Items' section, which includes a 'Category' dropdown menu and a table of work items.

Transaction ID	Transaction	FAIN	Status	Due Date	Last Updated
<a href="#">RA-3096</a>	Request Access		Submitted		9/6/19
<a href="#">CLM-2559</a>	Claim	FX170200-10.C007	Draft		9/6/19
<a href="#">NR17NRCSCENTC023-PF-Q2-19</a>	Performance Report	NR17NRCSCENTC023	Draft Pending Signature	10/4/19	9/6/19
<a href="#">NR17NRCSCENTC021-PF-Q2-19</a>	Performance Report	NR17NRCSCENTC021	Not started	10/4/19	9/6/19
<a href="#">AM17AMAXXXXG002-PF-SA2-2016</a>	Performance Report	AM17AMAXXXXG002	Not started	12/28/16	9/6/19
<a href="#">APP-5565</a>	Application		Draft		9/6/19



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Review the Request

1. On the **Request Access** screen, review the information on the **Role Selection**, **Organization**, and **Personal Information** tabs.

Ensure that the user has selected a valid organization and that there are no obvious typos in the user's personal information.

The screenshot shows the 'Request Access (RA-3096)' interface. At the top right, there are 'Print' and 'Close' buttons. Below the title, the status is 'Submitted'. A dropdown menu labeled 'Please Select An Option' is open, with 'Role Selection' selected and highlighted by a red box. Below the dropdown, there are three tabs: 'Role Selection', 'Organization', and 'Personal Information'. The 'Role Selection' tab is active, showing 'User Role' as 'Signatory/Official'. Below this, there is a section for 'Access Request Comments' with the text 'Why are you submitting this access request?' and 'I am the SO.'

2. Select either **Reject** or **Accept** from the **Please Select An Option** dropdown menu. Additional fields will appear based on your selection.

If you selected **Accept**, complete the additional steps explained in the **Accepting a Request** section of this document (pages 4-6).

If you selected **Reject**, proceed to the **Finalize Decision** section of this document (page 7).

This screenshot is a closer view of the 'Request Access (RA-3096)' interface. The 'Please Select An Option' dropdown menu is open, showing 'Accept' and 'Reject' as options, both highlighted by a red box. The 'Role Selection' tab is still selected, and the 'User Role' is visible as 'Signatory/Official'.

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### Accepting a Request

1. If needed, you can change the user's assigned role using the **Role Selection** field; however, users' roles can also be changed at any time through the **Manage Permissions** tile on the left-side navigation menu. Please refer to the **ezFedGrants Role and Access Management Job Aid** for more information.

The screenshot shows a form titled "Accept" with a "Submit" button. Below the title is an "Acceptance Comments" text area. The "Role Selection" section contains a dropdown menu for "User Role" with "Signatory Official" selected. Below this is a "Contact Details" section with a "Find Contact" button. A red box highlights the "Role Selection" dropdown menu.

2. In the next few steps, you will check if the user already has a Contact Record in the ezFedGrants System. If an individual has been involved with a USDA agreement in the past, they may have a Contact Record, even if they have never before had External Portal access.

You must at least search for a record, but you do not have to select a record.

To begin, scroll down to the **Contact Details** section and click the **Find Contact** button to open the **Find Contact** popup window.

The screenshot shows the "Accept" form with the "Contact Details" section highlighted by a red box. This section includes a "Find Contact" button. Below the button is a note: "Please search for the contact information of the user requesting access." followed by two bullet points: "Validate that the user is aligned with the correct organization. If the user has selected the wrong organization, reject the request." and "If the user is aligned with the correct organization, use the 'Find Contact' button to determine if the user already has a contact record in ezFedGrants. If no record exists, a contact will be created on approval." Below this are fields for "First Name", "Last Name", "City", and "State", all with "N/A" as the value.



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- In the **Find Contact** popup window, complete at least one **Search Criteria** field and click the **Search** button.

**Note:** To view all Contact Records for the organization (the broadest possible search), type a single asterisk (\*) into the **First Name** or **Last Name** field and leave all other fields blank.

- Review the **Search Results** table to determine if any of the retrieved records are a match.

*Selecting a record is not required. Only select a record if it is a match. Selecting a non-matching record will overwrite the details of the selected Contact Record, potentially interfering with Contact Records of other users in your organization.*

**Matching Record Found:** Click the **Select Contact** link. This will connect the Contact Record with the user's External Portal access.

**No Matching Record Found:** Do not select a record. Click the **Close** button to exit the **Find Contact** popup window. A new Contact Record will automatically be created in the ezFedGrants System once you finalize your approval of the access request.

**Note:** The system will display a warning message if you select a record that does not match the first and last name of the individual who has submitted the access request.

	First Name	Last Name	Email Address	City
<a href="#">Select Contact</a>	John	Doe	J.Doe@sample.edu	Washington
<a href="#">Select Contact</a>	Zeta	Jones	Z.Jones@example.gov	Washington
<a href="#">Select Contact</a>	Kline	Mann	K.Mann@test.com	Washington



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5. Double-check the **Contact Details** section of the **Request Access** screen to ensure it is correct:

**If you selected a record:** The fields will populate from the selected record. These details should generally match the equivalent details from the **Personal Information** tab of the access request (Scroll down the **Request Access** screen to see this tab).

**If there was no matching record:** All fields should be blank or display **N/A**.

If you selected the wrong record, click the **Clear Contact Selection** button to reset this section.

**Contact Details**

Please search for the contact information of the user requesting access.

- Validate that the user is aligned with the correct organization. If the user has selected the wrong organization, reject the request.
- If the user is aligned with the correct organization, use the "Find Contact" button to determine if the user already has a contact record in ezFedGrants. If no record exists, a contact will be created on approval.

First Name	Last Name
TEST	ARS
City	State
Washington	DC
Phone	Email
(123) 456-7890	mbooker@rutgers.gov



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## Finalize Decision

1. Enter comments relevant to your decision into the **Acceptance/Rejection Comments** text box.

The screenshot shows a web form titled "Accept". At the top, there is a dropdown menu labeled "Please Select An Option" and a blue "Submit" button. Below this is a large, empty text box labeled "Acceptance Comments", which is highlighted with a red border. Underneath the text box is a "Role Selection" section with a red asterisk and a "User Role" dropdown menu currently set to "Signatory Official".

2. Click the **Submit** button to finalize your decision.

The screenshot shows a confirmation form titled "Request Access (RA-3096)". The status is "Submitted". At the bottom, there is a dropdown menu labeled "Please Select An Option" and a blue "Submit" button, which is highlighted with a red border. Below the buttons is the word "Accept".

3. Upon successful submission, you will see a confirmation message.  
If there are any issues, an error message will be displayed.

The screenshot shows a confirmation message titled "Request Access (RA-3096)" with a status of "Approved". In the top right corner, there are "Print" and "Close" buttons. A green banner contains the message: "Access Request RA-3096 has been approved." Below this, there are tabs for "Role Selection", "Organization", and "Personal Information". The "Role Selection" tab is active, showing "User Role" as "Signatory Official".



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### See Also

#### Job Aids

- [Using ezFedGrants – The Basics Job Aid](#)
- [User Role Definitions](#)
- [Role & Access Management Job Aid](#)
- [Working with Multiple Organizations in ezFedGrants Quick Reference](#)

#### ezFedGrants Hyperlinks

- [ezFedGrants Home page](#)
- [ezFedGrants FAQs general](#)

#### Need Help?

Contact the ezFedGrants Help Desk at [ezFedGrants-cfo@usda.gov](mailto:ezFedGrants-cfo@usda.gov).

### Version Control

Name	Date	Changes Made
Abael Solomon	March. 2024	Removed Broken Links, Added eAuthenticain/Login.gov FAQs links
Abael Solomon	April. 2022	Removed Broken Links
Abael Solomon	Jan. 2022	Updated OCFO Website link
April Murphy	May 2019	Initial document created