



ezFedGrants Reimbursement Claim Submission

Job Aid



Before You Begin

This document describes how to create, edit, certify, and submit a reimbursement claim in ezFedGrants.

This document only applies to reimbursement claims, because advance payment claims cannot be submitted through the ezFedGrants External Portal. Furthermore, not all agencies or agreements allow submission of reimbursement claims through ezFedGrants. Please contact the appropriate agency representative if you aren't sure of where/how to submit your claim forms.

Key Terms

- **Advance Payment:** A type of claim in which funds are disbursed to the recipient ahead of incurring expenses. After expending advance payment funds, the recipient must submit a justification narrative describing how the funds were used. Advance payment claims and justification narratives **cannot** be submitted in the ezFedGrants External Portal; they must be submitted via email or another method as instructed by the awarding agency.
- **Reimbursement:** A type of claim in which the recipient has incurred expenses and is requesting reimbursement for those expenses. Reimbursement claims may be submitted through the ezFedGrants External Portal (if allowed by the awarding agency and terms of the agreement).

You Will Need

- Verified identity eAuthentication account
- The Grants Processor or Grants Administrative Officer (GAO) role in the ezFedGrants External Portal
- A qualifying agreement:
 - The agreement is in **Active/Awarded** status.
 - The agreement has funds available for disbursement.
 - All prior claims have been paid or cancelled (including justification narratives for advance payments).
 - All open or overdue performance, financial, property, or other reports have been submitted to the agency.

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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.

Warnings



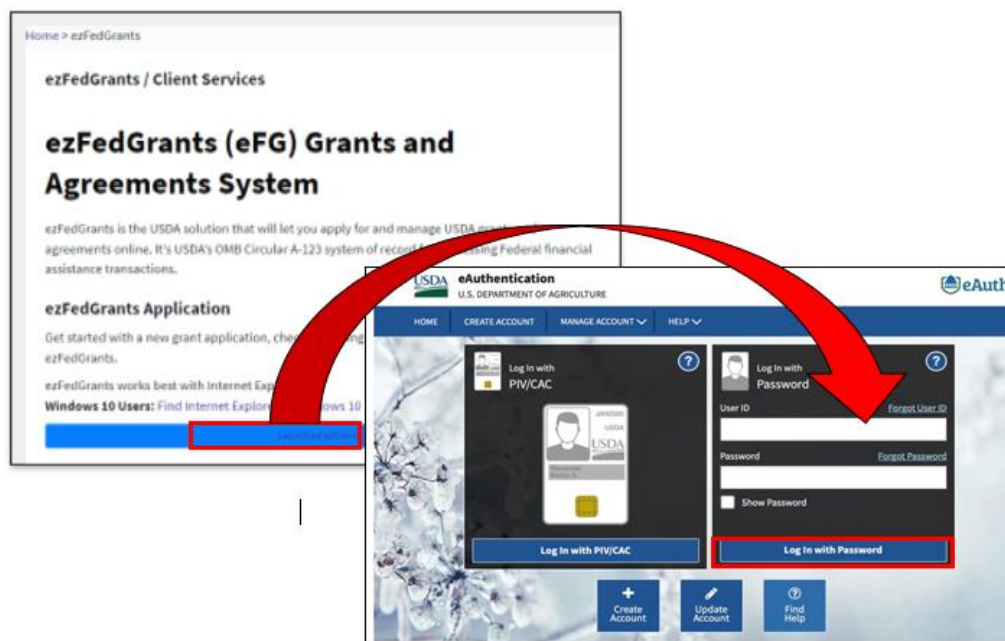
Only use this procedure for reimbursement claims!

Advance payment claims cannot be submitted through the ezFedGrants External Portal!

Please contact your awarding agency for guidance on advance payment claims.

Getting Started

Launch the ezFedGrants External Portal (from the [OCFO ezFedGrants website](#)) and log in with your eAuthentication Verified identity Account.



For questions regarding ezFedGrants access, including logging-in and eAuthentication, please review the Onboarding and Accessing ezFedGrants FAQs located on the [OCFO ezFedGrants website](#).

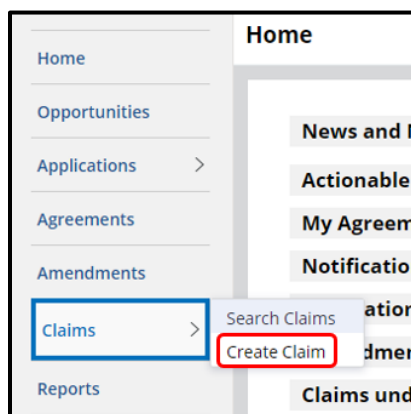
Create a Claim

To prepare a reimbursement claim in ezFedGrants, you must complete the claim form, designated a Certifying Official (who will review and sign the claim), and upload any supporting attachments.

Start New Claim

1. From the **ezFedGrants External Portal Home** screen, click the **Claims** tile on the navigation menu, and then click the **Create Claim** link on the dropdown menu.

Note: You can also select **Create Claim** from the **I want to** menu in the **My Agreements** section of the **Home** page (skip steps 2 and 3 below if you use this method).





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- The **Search Agreements** screen will open. Locate the agreement relevant to the claim by completing at least one **Search Criteria** field and clicking the **Search** button.

Note: This search will only show active/awarded agreements.

Search Agreements

Close

Search Criteria

FAIN

Project Title

Period of Performance Start Date

Period of Performance End Date

Status

Recipient Contact Name

M/d/yyyy

M/d/yyyy

M/d/yyyy

M/d/yyyy

Awarded

N/A

Search

Clear

- Locate the relevant agreement in the **Search Results** table and click the **Create Claim** link to open the **Create Claim** screen.

Note: If the **Create Claim** link is missing, the awarding agency for that agreement does not accept reimbursement claims through the ezFedGrants External Portal. In this case, please contact an agency representative for alternate submission instructions.

Search Results							
							Export
FAIN	Status	Project Title	Recipient Contact Name	Performance Start Date	Performance End Date	Total Federal Award Amount	Actions
FX170200-10.C007	Awarded	Report Testing	Grace Peterson	1/10/17	12/31/99	\$5,000.00	Create Claim
FX170200-10.C008	Awarded	NRCS Enterprise Demo	app pro1001	1/12/17	12/31/20	\$199,999.99	Create Claim
FX170200-10.G029	Awarded	NRCS Demo - agreement workflow	app pro1001	1/19/17	12/31/20	\$2,000.00	Create Claim
AP17PPQCPHSTG004	Awarded	Patrick Rhodey PPS Test Agreement	PAT RHODEY2	1/24/17	6/7/19	\$49,999.99	Create Claim



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Complete SF-270

The first stage of the **Create Claim** screen is the SF-270 claim form. You must complete the mandatory fields [indicated by an asterisk (*)] along with (usually) some non-mandatory fields. It is recommended to save your progress often by clicking the **Save** button. You can also print your claim by clicking the **Print** button.

*This document only describes the **minimum** requirements for submitting a reimbursement claim in ezFedGrants. Usually, you will need to complete additional non-mandatory fields or upload additional attachments. To avoid delays in processing, please take your time to ensure that all fields, attachments, etc. are complete and correct (to the best of your knowledge).*

Some fields are pre-populated from the associated agreement and cannot be edited. If the information in a locked field appears incorrect, please contact an agency representative.

1. Select either **Final** or **Partial** for **1b. Type of Payment Requested**.

Note: The **Reimbursement** option is selected by default for **1a** because advance payment claims cannot be submitted through the ezFedGrants External Portal. **Do not force advance payment claims through ezFedGrants.** Please contact your awarding agency for guidance on submitting advance payment claims.

2. Select either **Cash** or **Accrual** for **2. Basis of Request**.

3. Fields 3 through 6 are auto-populated and not editable. Field 7, **Recipient's Account or Identifying Number**, is optional.



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4. In **8. Period Covered by This Request**, enter the appropriate dates in the **From** and **To** fields. These dates must fall within the Period of Performance dates for the associated agreement.

Select a date from the calendar (click the **Calendar** icon in each field) or type the date in MM/DD/YYYY format.

8. Period Covered By This Request	
* From	* To
M/d/yyyy	M/d/yyyy

5. Boxes 9 and 10 are auto-populated and not editable.

9. Recipient Organization		10. Payee (Where check is to be sent if different than item 9)	
Name:	RUTGERS THE STATE UNIV OF NEW JERSE SCIENCE DEPT2 RESOURCE FOUNDATION SCHOOL OF AGRICULTURE	Name:	
Number and Street:	34 RUTGERS PLAZA	Number and Street:	
City:	NEW BRUNSWICK	City:	
State:	NJ	State:	
Zip:	08901-8559	Zip:	

6. Locate **Section 11 Computation of Amount of Reimbursements/Advances Requested** and enter either today's date or another appropriate date in the **As of Date** field in **Row A (Total Program Outlays to Date)**.

Claim Amount:					
11. Computation of Amount of Reimbursements/Advances Requested					
Programs/ Functions/ Activities	As of Date	(a) FX170200-10.G029	(b) Agency Calculations (For your reference only)	(c) Programs/ Functions/ Activities	Total
a. Total program outlays to date	M/d/yyyy				
b. Less: cumulative program income					
c. Net program outlays (line a minus line b)		\$0.00			\$0.00
d. Estimated net cash outlays for advance period		\$0.00			
e. Total (sum of lines c & d)		\$0.00			\$0.00
f. Non-Federal share of amount on line e		\$0.00			\$0.00
g. Federal share of amount on line e		\$0.00			\$0.00
h. Federal payments previously requested			\$0.00		
i. Federal share now requested (line g minus line h)		\$0.00			\$0.00

7. Complete the rest of **Section 11** by entering dollar values as applicable to this claim. Details are provided in 7a-d, below. Some fields will auto-calculate based on your entries in other fields. Some auto-calculated fields may be manually edited.

- a. Enter the relevant dollar values in **Row A (Total Program Outlays to Date)** and **Row B (Cumulative Program Income)**. **Row C (Net Program Outlays)** will automatically calculate based on your entries in Row A and B.

a. Total program outlays to date	M/d/yyyy				
b. Less: cumulative program income					
c. Net program outlays (line a minus line b)		\$0.00			\$0.00



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- b. **Row E (Sum of Line C and D) and Row F (Non-Federal Share of Amount on Line E)** will also auto-fill based on Row A, B, and C.

e. Total (sum of lines c & d)		\$0.00			\$0.00
f. Non-Federal share of amount on line e		\$0.00			\$0.00

- c. Enter the relevant dollar values in **Row G (Federal Share of Amount on Line E)** and **Row H (Federal Payments Previously Requested)**. After completing one or both of these fields, **Row I (Federal Share Now Requested)** will automatically calculate (Row G minus Row H).

g. Federal share of amount on line e		\$0.00			\$0.00
h. Federal payments previously requested			\$0.00		
i. Federal share now requested (line g minus line h)		\$0.00			\$0.00

- d. Complete any additional lines in this section or adjust as necessary.
8. Locate the **Requested Amounts by Cost Element** section. In the **Direct Requested Amount** column, input relevant values for each **Cost Element** applicable to this claim.

The amount requested for an individual cost element **can** exceed the budgeted amount allocated to that line; however, the total amount requested for the entire claim **cannot** exceed the total amount of funds for the entire agreement.

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				

9. Complete any additional fields on the SF-270 as necessary.

Note: The fields in the **Certification** section of the SF-270 will remain blank until the Certifying Official digitally signs the claim. The certification procedure is described later in this document.

10. Click the **Next** button to proceed to the **Signature** stage.

AA

PrintSaveCloseNext >>



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Designate Certifying Official

In the **Signature** stage, you will designate one or more Certifying Officials for your claim. The Certifying Official is responsible for digitally signing the claim.

Certifying Official is a temporary role that only applies for a single claim, report, or repayment request. Any user with ezFedGrants access for your organization can be a Certifying Official, including yourself.

1. You must designate at least one Certifying Official in the **Primary Certifying Official** field. This can be yourself or any other user with ezFedGrants access for your organization.

To select a Certifying Official, click in the **Primary Certifying Official** field, press the **Down Arrow** key on your keyboard, and then select the relevant user from the dropdown menu. It may take several seconds for the dropdown menu to appear, depending on the number of users in your organization.

You can filter the menu by typing one or more letters into the field. For example, if you want to assign Geoffrey Chaucer as your Certifying Official, you could type "ge" to see all users with "ge" in their name.

*This field **will not** accept typed entries; you **must** select the username from the dropdown menu.*

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

2. Repeat the above if you would like to assign an alternate Certifying Official in the **Secondary Certifying Official** field. This is only necessary if you believe the primary Certifying Official will not be available.

Assigning a secondary Certifying Official does not cause the claim to be reviewed twice. Only one of the two Certifying Officials will certify the claim.

3. Click the **Next** button to proceed to the **Attachments** stage.

Note: If you need to go back to an earlier stage, click the **Previous** button.



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Add Attachments

1. Upload any supporting documentation required for your claim by clicking the **Click Here to Attach Files** link.

Note: Do not include any personal identifying information (PII) on your attachments unless specifically instructed to do so. PII includes details such as dates of birth, social security numbers, and personal criminal history.

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

2. On the **Add Attachment** popup window, click the **Choose File** button to locate the relevant file on your computer.

Add Attachment

Title:
Other

Other Attachment Title:

Please enter a valid value

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

OK Cancel

3. Type a title for your document in the **Other Attachment Title** field, then click the **OK** button to upload the file.

Add Attachment

Title:
Other

Other Attachment Title:

Please enter a valid value

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

OK Cancel

4. Repeat until you have uploaded all necessary documentation.
5. To remove an attachment, click the button in the **Delete** column.

(D) Attachments				
List of Attached Files:				
Title	File	Operator	Date/Time	Delete?
Application Instructions	resulttemplate.docx	APHIS AG APHIS MO	9/11/2019 8:55 AM	



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Finalize the Claim

Once you have completed the SF-270, designated at least one Certifying Official, and uploaded all relevant attachments, you are ready to submit the claim to the Certifying Official for review and signature prior to submission to the relevant agency.

1. Click the **Submit** button to send the claim to the Certifying Official(s). The **Submit** button is only available when viewing the **Attachments** stage.

Print	Submit	Save	Close	<< Previous
-----------------------	------------------------	----------------------	-----------------------	-----------------------------------

2. ezFedGrants will check that your claim meets all minimum requirements. If submission is successful, a confirmation message will appear at the top of the screen. Otherwise, you will see one or more error messages indicating what must be corrected before the claim can be submitted.

Once submitted, notifications and work items are sent to the designated Certifying Official(s).

Note: Click the **Print** button to print the claim.



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Certifying Official: Review & Sign Claims

If you are assigned as a Certifying Official for a claim, you will receive a work item (Actionable Item) to review and sign the claim. You will receive this work item even if you are certifying your own claim. This section describes how to open and complete claim work items.

Each claim may have up to two Certifying Officials assigned, but only one Certifying Official needs to complete the claim work item. If you receive a work item notification, but do not see the work item in your **Actionable Items** list, the other Certifying Official may have already completed the work item.

Once a claim is certified, it is submitted to the relevant agency.

1. On the **ezFedGrants External Portal Home** screen, locate the claim you want to review in the **Actionable Items** section. Click the **Transaction ID** link to open the claim work item.

Note: If you have a lot of work items, use the **Category** dropdown menu to filter the **Actionable Items** list.

Actionable Items					
Category					
Claim					
Transaction ID	Transaction	FAIN	Status	Due Date	Last Updated
CLM-2495	Claim	NR18NRCSCENTG008	Draft Pending Signature		8/14/19

2. On the **Claim** screen, review the SF-270 form and attachments by clicking the tabs.

Claim (CLM-2495) Print Close

Status:
Draft Pending Signature

Please Select An Option

SF-270 Signature Attachments Comments

3. After reviewing the claim, select **Sign and Submit**, **Return**, or **Cancel** from the **Decision** dropdown menu.

- **Sign and Submit:** The claim is ready to be submitted to the agency.
- **Return:** The claim needs to be corrected before submission to the agency.
- **Cancel:** The claim should be discarded.

Please Select An Option

Sign and Submit

Return

Cancel



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4. If you selected the **Return** or **Cancel** option, enter relevant comments in the **Comments** text box.

If you selected the **Sign and Submit** option, you must click the **Legal Notice** button and accept the legal notice before finalizing your decision. Acceptance of the legal notice is required to submit your claim to the agency. If you disagree with the legal notice, please contact an agency representative.

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

5. Click the **Complete Signature** or **Submit** button to finalize your decision.

If submission is successful, you will see a confirmation message. Otherwise, you will see an error message explaining why your decision was not accepted.

Based on your decision, one of the following outcomes will occur:

- **Sign and Submit:** The claim is sent to the appropriate agency for processing
- **Return:** The claim is returned to the creator for modification. You will receive a new work item when the creator resubmits the claim.
- **Cancel:** The claim is voided and no further action can be taken.

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

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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



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Editing Claims

Although all users with either the Grants Administrative Officer (GAO) or Grants Processor role can create new claims, once a claim is saved, sent to the Certifying Official, or submitted the awarding agency, the status of the claim determines who can edit the claim.

Users with the GAO role can reassign Draft and Returned claims if they are stuck with a Grants Processor who is unavailable or otherwise unable to act on the claim.

Draft

The claim creator and anyone with the GAO role can edit the claim.

Draft Pending Signature

If a claim must be edited after it has been submitted to the Certifying Official, the Certifying Official must send the claim back by selecting the **Return** option when reviewing the claim.

You must return a claim in order to edit it, even if you are self-certifying your own claim.

Returned by Certifying Official

The claim creator and anyone with the GAO role can edit the claim.

Submitted

If you need to make changes to a claim after it has been submitted to the relevant agency, please contact the agency to request return of the claim.

Returned by Awarding Agency or Acceptance Pending Edits

The claim creator and anyone with the GAO role can edit the claim.



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See Also

Job Aids

- ezFedGrants External Portal User Roles Quick Reference
- Using ezFedGrants – The Basics Job Aid
- Using ezFedGrants – Searching Job Aid
- ezFedGrants Repayment Request Submission Job Aid
- Reassigning Work Items in ezFedGrants Quick Reference

ezFedGrants Hyperlinks

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

Need Help?

Contact the ezFedGrants Help Desk at ezFedGrants-cfo@usda.gov.

Version Control

Name	Date	Changes Made
Kandice Whitaker	May 2022	Removed broken FAQ link & added links to ezFedGrants website
Abael Solomon	Jan. 2022	Updated OCFO Website Link
Courtney Roberson	March 2020	Replaced all Level 2 eAuthentication references with verified identity verbiage
April Murphy	Sept. 2019	Initial document created