



ezFedGrants External Portal User Roles

Quick Reference

Primary Roles

To use ezFedGrants, you must be assigned one of three primary user roles. This document describes the three primary roles and one secondary role available to external users. External users are non-agency staff (cooperators, recipients, applicants, etc.) who use ezFedGrants.

*Each **individual user** cannot have more than one primary role; however, each **organization** may have multiple users with the same primary role.*

Grants Administrative Officer (GAO)

This role has the most permissions of all the external portal users. Each organization must have at least one GAO to use ezFedGrants.

This Role Can:

- Approve access requests, change user roles, and deactivate user access.
- Reassign draft, draft pending signature or returned applications, claims, repayments, and reports.
- Generate work item and user administration reports.
- Create claims, repayment requests, and applications.
- Prepare and submit financial and performance reports.
- Be designated as a Certifying Official (secondary role).

Comparative Occupational Functions and Titles:

- **Titles:** Grants Administrative Specialist, Grants Administrative Manager, Grants Administrator
- Provide advanced grants administrative support and management including expertise in application processes and regulatory, reporting, and financial compliance.
- Monitor grant award budgets, prepare and process claims, verify the accuracy of claims.
- Support and assist in preparing and submitting grant proposals.
- Assist in completing and submitting quarterly and annual federal grant reports.

Grants Processor (GP)

This role is like the GAO role, with the primary difference being that the GP does not manage user access, roles, or work item assignments.

This Role Can:

- Prepare and submit financial and performance reports.
- Create applications, claims, and repayment requests.
- Be designated as a Certifying Official (secondary role).

Comparative Occupational Functions & Titles:

- **Titles:** Grants Financial Analyst, Grants Officer, Grants Assistant.
- Assist with preparing grants applications, writing and proofreading proposals.
- Prepare claims and invoices, provide updates on grants budgets.
- Prepare grant award data for quarterly and annual federal reports.

Signatory Official (SO)

This role has a limited scope compared to the other roles, but each organization must have at least one SO in order to fully use ezFedGrants. Without an SO, your organization will not be able to submit applications or sign agreement documents in ezFedGrants.

This Role Can:

- Prepare and submit financial and performance reports.
- Review and digitally sign applications, agreements, and amendments.
- Be designated as a Certifying Official (secondary role).

Comparative Occupational Functions:

- Verify grant applications are complete and accurate.
- Review and sign completed grant applications.
- Review and sign grant award packages prior to notification of award.
- Review and sign amended grant award packages.

Secondary Roles

There is one secondary role. All users may have this role in addition to their primary role.

Certifying Official

The Certifying Official reviews and signs claims, repayment requests, and financial and performance reports. This is a temporary role that only applies to a specific claim, repayment request, or report. Any user can be a Certifying Official regardless of their primary role; you can even be the Certifying Official for claims, repayment requests, and reports that you created/prepared. The certifying official is designated at the time the work item is prepared.

Need Help?

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

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