



ezFedGrants

Frequently Asked Questions (FAQ)

Recipients



Module 1

Course Introduction



Agenda



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Introduction Instructor and Students



Please enter in chat:

- What organization are you representing?
- What is your role?
- What is your goal for joining today's FAQ training session?





Course Overview & ezFedGrants Help Desk



- The purpose of this session is to provide an opportunity to address frequently asked questions from ezFedGrants external recipient users.
- It is also an opportunity to review recurring topics or issues related to ezFedGrants.
- 80% of issues that don't require technical support are typically resolved in one business day or less.

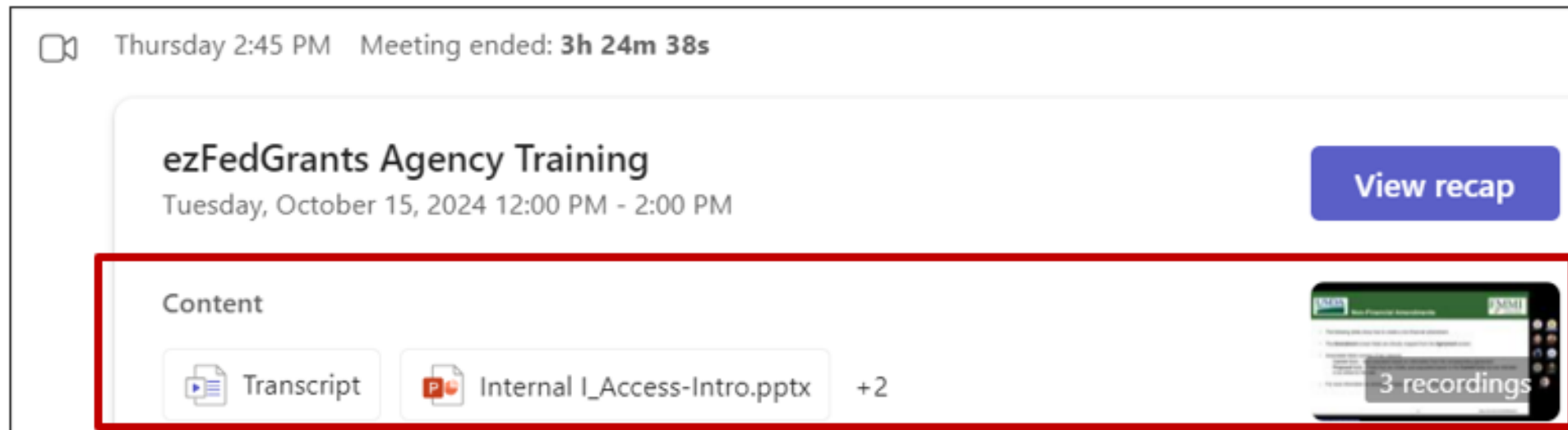




Session Recorded



- Session is being recorded and will be available for attendees after the session within the Teams chat.
- Transcripts are also provided.

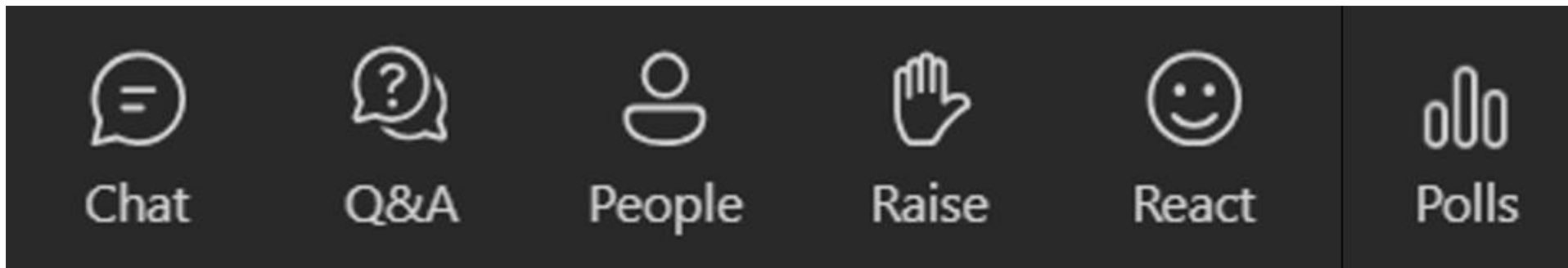




Participation



- 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.

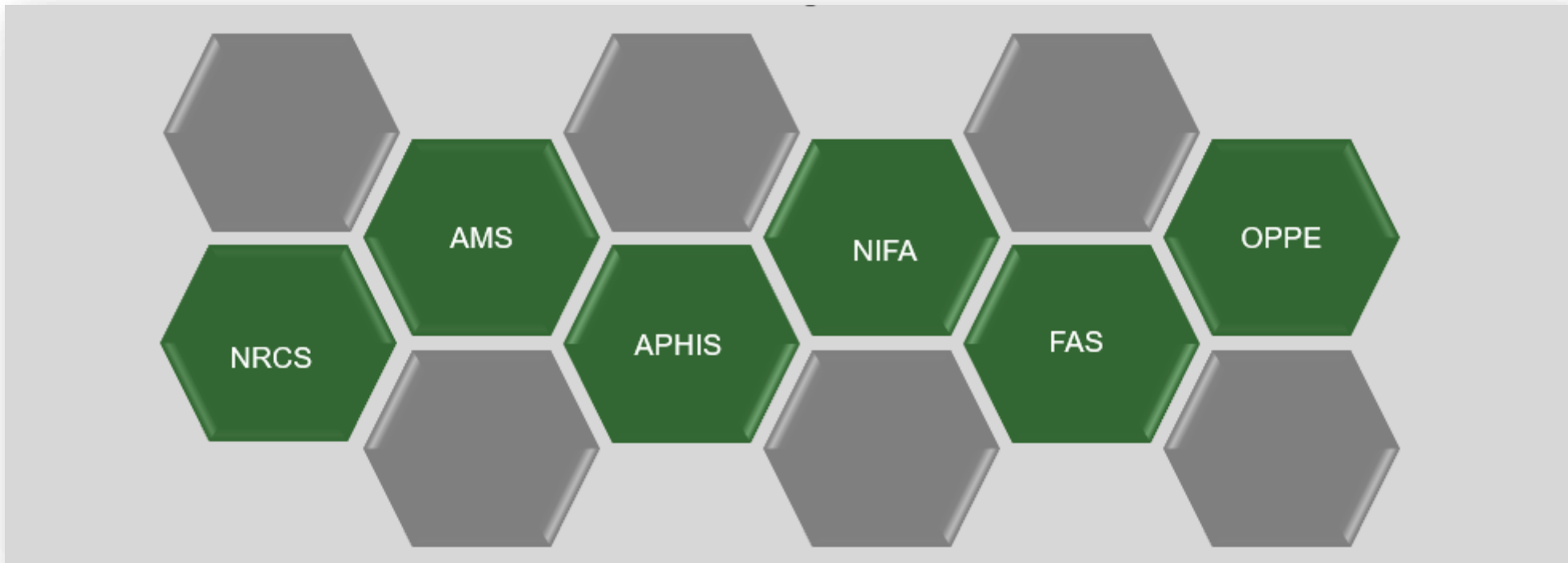




Agency Processes



- ezFedGrants functionality, processes and workflows are agency-specific.
- **For questions related to awards, agreements, and policy contact your Agency Point of Contact (POC).**
- Agency representative is listed within the opportunity or agreement.





Getting Help



Login.gov

- Call (844) 875-6446
- Operating hours 24 hours a day, 7 days a week
- Refer to [Login.gov FAQs](#)

ezFedGrants

- Contact ezFedGrants help desk: ezFedGrants-cfo@usda.gov
- Training schedule [eFG Training Schedule](#)
- Recipient job aids: [Job Aid Library](#)



Bookmark or favorite these links!

Module 2

Access and Roles



ezFedGrants and Grants.gov



Question:

- What is the difference between ezFedGrants and Grants.gov?
- Why are there two systems?

Answer:

- Grants.gov is central point for all grant information across entire federal government.
- ezFedGrants is USDA specific.
- Grants.gov only covers a portion of the grants life cycle (mainly the pre-award stages).
- ezFedGrants covers the entire grants life cycle.
- USDA agencies may still request that you submit applications through Grants.gov.
- Grants.gov applications can be pulled into ezFedGrants.





Register for ezFedGrants



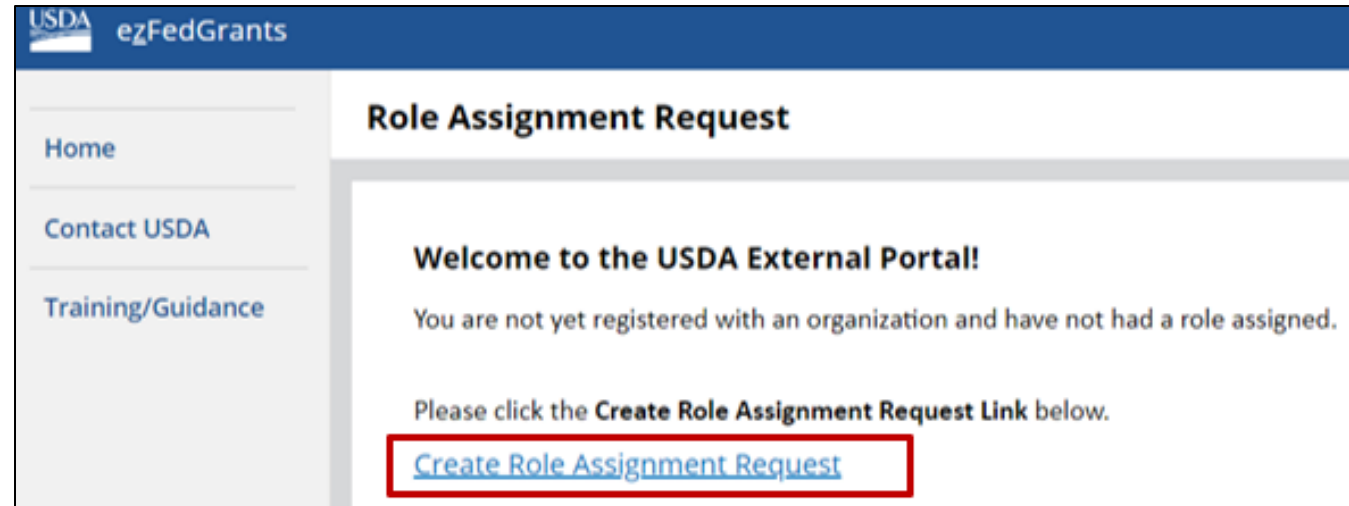
Question:

How do I register for ezFedGrants?

Answer:

1. Obtain a [Login.gov](#) account.
2. Navigate to the [ezFedGrants](#) website.
3. Click **Create Role Assignment Request**.
4. The role request is sent to your organization's Grants Administrative Officer (GAO) for approval.

Note: If you are the first user for your organization, choose the GAO role and agency to send role request to agency AGMO.





Role Assignment



Question:

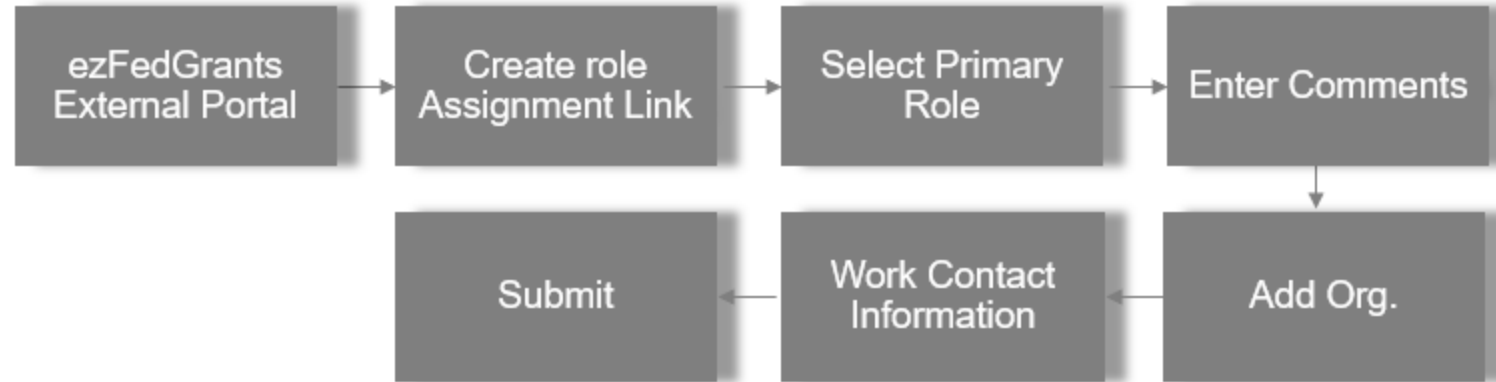
How can I replace someone that is on our account with the new individual?

Answer:

A GAO approves the new individual. The GAO can also remove a user from your organization.

Use the following steps to request a role.

1. Access **ezFedGrants External Portal Home** screen.
2. Click **Create Role Assignment Request** link. Refer to [Role Assignment Job Aid](#) for guidance on requesting an ezFedGrants role.



3. Select primary role.
4. In **Access Request Comments**, explain why submitting request or requesting role.
5. Click **Next** button.
6. Add **Organization**.
7. Click **Next** button.
8. Complete **Work Contact Information**.
9. Click the **Submit** button.



External User Role List



Question:

Where can we find a list of all the available user roles and what each can do?

Answer:

- [ezFedGrants External Portal User Roles](#)
- Each person can only have one primary user role.

Grants
Administrative
Officer
(GAO)

Grants Processor
(GP)

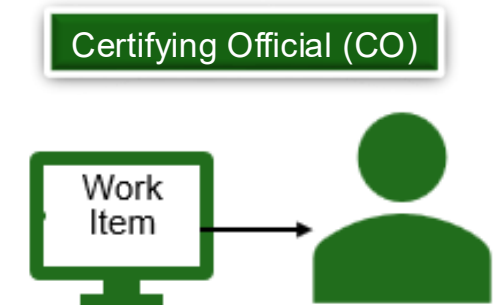
Signatory Official
(SO)

Question:

What is the difference between a SO and a CO?

Answer:

- You can have more than one signatory official in your organization but at least one.
- Signatory officials are different from certifying officials.
- A signatory official is a primary user role that signs applications, agreements, and amendments.
- Anyone can be a certifying official; it is assigned as an approver on a work item basis.



- Secondary role
- CO approver assigned to work item



Changing a SO or CO Reviewer



Question:

How can I change a Signatory Official (SO) or Certifying Official (CO) after a work item has been created?

Answer:

1. Access the report/claim/application from your Actionable Items.
2. Go to the **Signature** tab.
3. Select the **Clear** button to remove the name in the Certifying/Signatory Official field.
4. Click the down arrow key on your keyboard or type the first two or three letters of the user's name.
 - The names of valid users should appear in the dropdown list.
 - The system dropdown will appear with the name(s) of valid users underlined.
5. Select a name from the dropdown list to update the field.
6. Click the **Save** button.
7. Re-submit the report/claim/application.



Determine My Role

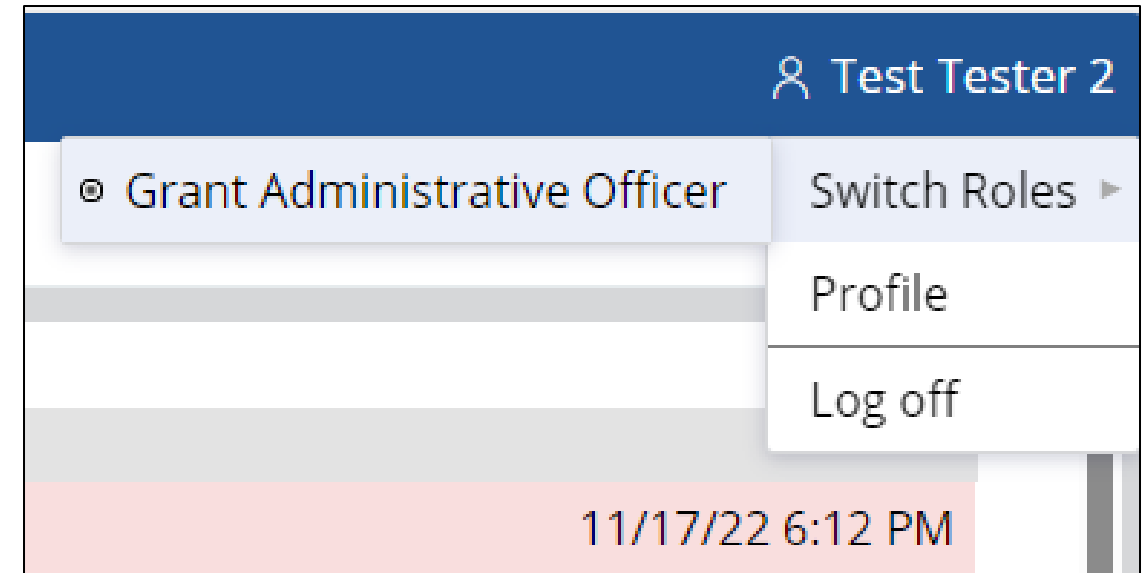


Question:

Is there a way to check which role(s) we have?

Answer:

- The role is displayed at the top of the **Home** screen once you are assigned one.
- You can also click the Profile icon at top right of the screen and your role displays.
- If it is incorrect, contact your GAO.



Module 3

System Navigation



Organization's Work Items



Question:

Why am I seeing all the progress reports for my organization within my actionable items?

Answer:

- All organization reports route to centralized workbasket for all ezFedGrants active users within the organization.
- Avoids reports being reassigned or inaccessible due to another user accessing it.
- Take advantage of the **filter** options available to locate agreement-specific reports.

Home

News and Notes

[Test External](#)

Actionable Items

Category

Application	Transaction
Claim	Application
Role Assignment Request	Financial Report
Report	Financial Report
Electronic Signature - Amendment	Performance Report
Electronic Signature - Agreement	Financial Report
	Financial Report
	Claim



Filtering Work Items

Use Category
Dropdown

Actionable Items

Category

Application

Claim

Role Assignment Request

Report

Electronic Signature - Amendment

Electronic Signature - Agreement

Use Click to
Filter

Case ID	Transaction	FAIN/ID	Status	Due Date	Last Update
---------	-------------	---------	--------	----------	-------------

Status

[Clear Filter](#)

☐ [No Value]

☐ Draft

☐ Pending Clarification

Pending

[Apply](#) [Cancel](#)



View Work Item History



Question:

- How do I view work item history?
- For example, a claim, report, or agreement.

Answer:

Open any work item.

Scroll down and click on **Additional Information**.

- **Audit** – View history of corresponding transaction
- **Partners** – Display partners listed on the agreement
- **Agency Assignments** – View agency agreement contacts
- **Emails Sent** – Provides history of email notifications distributed on item

etFedGrants

Create Report NR173A750001G023-FI-Q4-20 (RPT-2891)
CRM Activity ID: 0000001844 DueDate: 10/2/2020

Comments

Comment

Test

1. SF-425 2. Signature 3. Attachments

Signature

Select a Certifying Official by typing their name into the appropriate field. As you type matches. Please note that the user must be registered in etFedGrants. You can select

A Primary Certifying Official must be selected. The Secondary Certifying Official is optional.

Primary Certifying Official

TEST GAO

Clear

Additional Information

Audit Partners Agency Assignments Emails Sent

Role	ID
Rec. Administrative Contact	SIGOFF<BROKEN>
Recipient Program Contact	GAO1



Duplicate Work Items in Actionable Items List



Question:

- When I access my **Actionable Items** list, I am seeing duplicate work items.
- How do I correct this?

Answer:

- Complete one of the items and the duplicate should disappear.
- Contact the ezFedGrants helpdesk at ezFedGrants-cfo@usda.gov for additional information.



Module 4

Applications and Agreements



Submitted Applications



Question:

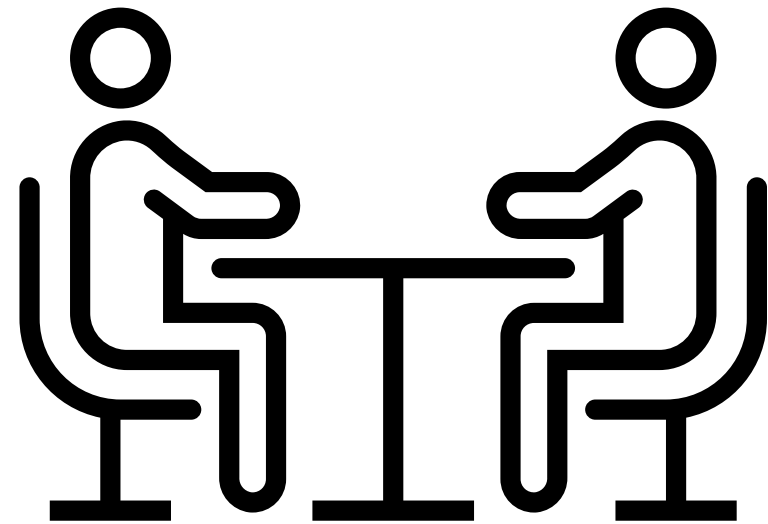
How long will my application be in review before a decision is made?

Answer:

The application review process varies based on agency and opportunity.

Please refer to the specific opportunity for a projected timeline.

You can also reach out to the opportunity POC to see if they have a review deadline.





Approved Applications



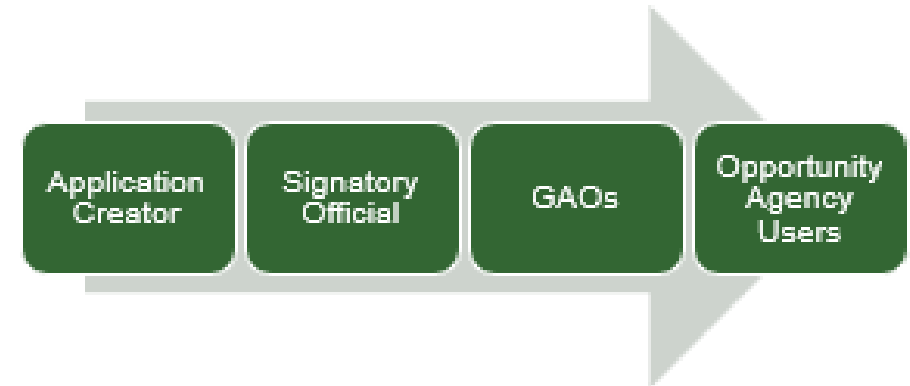
Question:

Who receives notifications once an application has been approved?

Answer:

Once an application is **Approved**, a notification goes to the following individuals:

- The application creator.
- The Signatory Official that signed it.
- All Grant Administrative Officers (GAOs) within that organization.
- Agency users listed in the opportunity.





Agency Representative



Questions:

How do I determine my Agency Point of Contact (POC)?

Answer:

- On the opportunity, there is a POC listed for any questions.
- Your agreement lists at least two agency POCs for you to contact with questions.
- The POC is also listed on your Agreement face sheet.
- The contact information for agencies is located on our [ezFedGrants website](#).



Module 5

Claims



Claim Reimbursement Timeframe



Question:

How long does it take to be reimbursed for a claim?

Answer:

- Agencies have up to 30 days to pay a claim.





Claim Submissions



Question:

How often can I submit a new claim?

Answer:

- You can only submit one claim at a time.
- Your agreement document should outline any specifics about a payment schedule, which will determine how often you can submit claims.





Unable to Submit New Claim



Question:

Why can't I submit a new claim?

Answer:

Claims cannot be submitted by recipients unless the following occur:

- All overdue progress reports are submitted and up to date.
- Progress reports are approved by the agency.
- All prior claims are approved or cancelled.
- Claims can only be submitted one at a time.





Can you return my claim please?

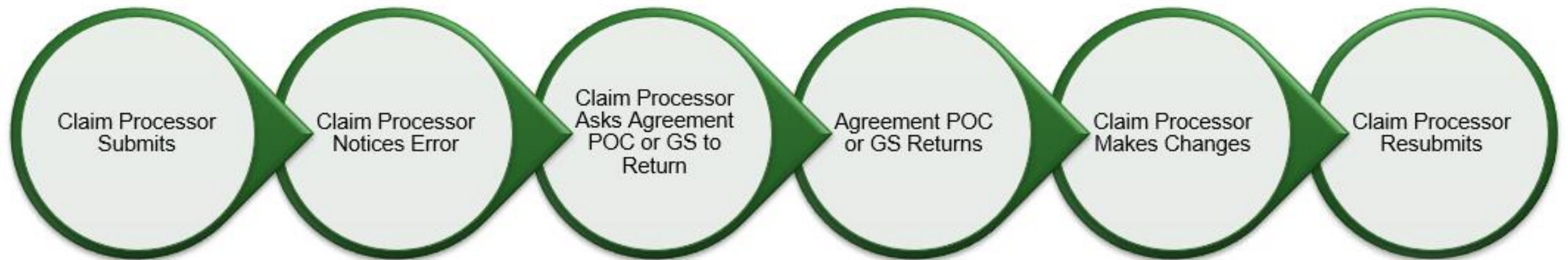


Question:

When a claim is submitted, how do we request that it be returned if we've noticed an issue later?

Answer:

Reach out to your **Agreement POC** or **Grant Specialist (GS)** and explain the situation.





Advance Claims



Question:

Can recipients submit advanced claims in eFG?

Answer:

- No, advance claims cannot be submitted within the system by recipients.
- The claim type option defaults to **Reimbursement** and for recipients, it cannot be changed to **Advance**.
- For an advance claim, reach out to your Agreement POC.
- Advance claims are processed by the agency at the recipient's request.
- The ability to request advances varies based on the agency you're working with and your agreement.





Claim Documentation



Question:

- What documents do I need to submit with my claim?

Answer:

- A standard form 270 (SF-270) is required for submitting claims.
- Additional required documentation will vary depending on the awarding agency and agreement.
- Generally, you should include any documents that show how the division and use of the funds you're claiming.
- You can ask your agreement POC for any specifics on which documents they'd like to see.





Claim in Draft Pending Signature Status



Question:

- My claim has been in the status **Draft Pending Signature**.
- I don't know what my next steps are.
- Is there something I need to do on my end?

Answer:

- If a claim is in the **Draft Pending Signature** status, it is assigned to the CO.
- The CO accesses the claim from their **Actionable Items** list.
- Then, the CO signs and submits the claim to the Agency.
- If the claim has been in the **Draft Pending Signature** status for a while, contact the CO.



Module 6

Repayments



Repayment Request

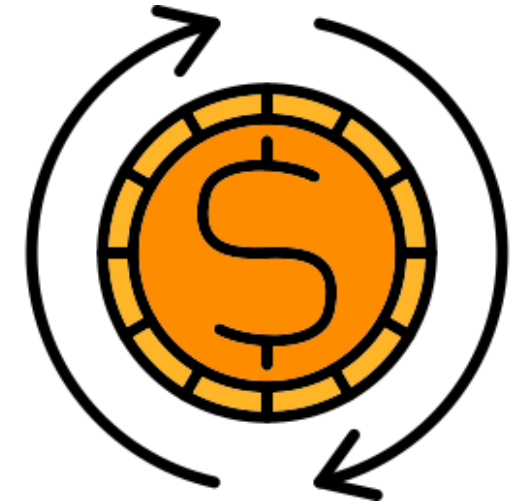


Question:

What is a repayment request?

Answer:

- A repayment request is rare but occurs when USDA pays the recipient more than they should through either type of claim.
- This may happen for various reasons such as overestimation of costs by the recipient.
- Recipient needs to send the money back to USDA.
- Contact your agency to request a repayment and they will enter it for you.



Module 7

Reporting



Edit Report

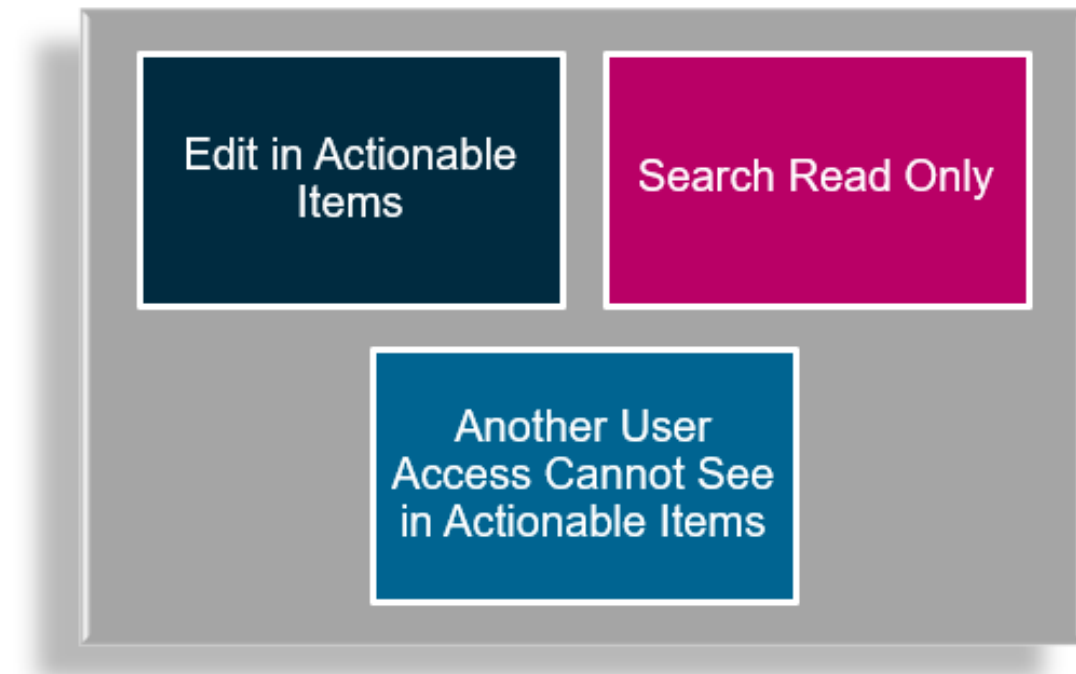


Question:

- I am trying to submit a progress report and have started the process.
- Report is saved as a draft but I am not able to go back in to edit it.
- It has disappeared from the **Actionable Items** list.

Answer:

- You can only edit reports if you've accessed them through **Actionable Items**.
- If you're searching for it, it is read-only and not editable.
- If someone else has it open, it won't show up in **Actionable Items**. This could be why it disappeared.





Who is Working on Report?



Question:

Is there a way to see who else is working on your report?

Answer:

1. Open the report.
2. Scroll down to **Additional Information**.
3. Click **Additional Information**.
4. Note audit trail of who has worked on the item.

Additional Information		
Audit	Partners	Agency Assignments
Emails Sent		
History		
<div><< < Page 1 of 4 > >></div>		
Time ↓	Description	Performed by
1/7/25 4:28 PM	Assigned to Test Tester 3 to 'Enter Information'	Test Tester 3
1/7/25 4:28 PM	Assignment to 'complete task' completed by performing a 'StartScreenFlowAuto'.	Test Tester 3
12/31/24 2:00 AM	Assigned to ReportSubmission to 'complete task'	Agent(USDA-FW-Grantor-Work-Report.SendReportCaseBacktoWorkbasket)
12/31/24 2:00 AM	Assignment to 'Enter Information' removed via ticket.	Agent(USDA-FW-Grantor-Work-Report.SendReportCaseBacktoWorkbasket)
12/30/24 8:00 AM	Assigned to Test Tester 2 to 'Enter Information'	Test Tester 2
12/30/24 8:00 AM	Assignment to 'complete task' completed by performing a 'StartScreenFlowAuto'.	Test Tester 2
11/8/24 2:00 AM	Assigned to ReportSubmission to 'complete task'	Agent(USDA-FW-Grantor-Work-Report.SendReportCaseBacktoWorkbasket)
11/8/24 2:00 AM	Assignment to 'Enter Information' removed via ticket.	Agent(USDA-FW-Grantor-Work-Report.SendReportCaseBacktoWorkbasket)



Report Due/Cannot Locate



Question:

- What if you have a report that is due per the agreement, but the report does not display within your actionable items?
- It also does not display under **Reports** when you search by FAIN.

Answer:

- If anyone else is accessing that report, it does not show up in your **Actionable Items**.
- Sometimes, the system does not create the reports which is not common. However, it does occur and if it does, contact the ezFedGrants help desk.
- The reporting schedule is dependent on your reporting schedule on the **agreement**.





Report Timeframes



Question:

- How early can we submit reports ahead of official due dates?

Answer:

- Reports are generated based on reporting requirements in the agreement.
- Once the report is visible, you can begin the report and submit prior to the deadline.
- Reports cannot be submitted outside of the schedule.
- USDA agencies ask for 30 days to review reports.

Report Due Date Break Down

Report Type	Filing Period Requirement
Quarterly Reports	Due after 30 days in the system
Semi Annual Reports	Due after 30 days in the system
Annual Reports	Due after 120 days
Final Reports	Due after 120 days

Module 9

Question and Answer Session



Potential Topics



Topics to consider for questions include:

- Login.gov
- User Roles
- Applications
- Approval Workflows
- Reports
- Claims



Module 10

Course Summary



Additional Resources



Login.gov

- Call (844) 875-6446
- Operating hours 24 hours a day, 7 days a week
- Refer to [Login.gov FAQs](#)
- Review the [Recipient training schedule](#)

ezFedGrants

- Contact ezFedGrants help desk: ezFedGrants-cfo@usda.gov
- Training schedule: [eFG Training Schedule](#)
- Recipient job aids: [Job Aid Library](#)



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Course Poll

