



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

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

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

Locating Access Requests

1. 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 'Home' page of the ezFedGrants External Portal. The left sidebar contains navigation links: 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 includes a 'News and Notes' section with a 'Sample Post 1' dated 8/21/19 10:06 AM. Below this is the 'Actionable Items' section, which features a 'Category' dropdown menu and a table of work items. The table has columns for Transaction ID, Transaction, FAIN, Status, Due Date, and Last Updated. The first row, 'RA-3096', is highlighted with a red box. The other rows are 'CLM-2559', 'NR17NRCSCENTC023-PF-Q2-19', 'NR17NRCSCENTC021-PF-Q2-19', 'AM17AMAXXXXG002-PF-SA2-2016', and 'APP-5565'.

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

Request Access (RA-3096)
Status: Submitted

Print Close

Please Select An Option

Role Selection Organization Personal Information

Role Selection
User Role
Signatory Official

Access Request Comments
Why are you submitting this access request?
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).

Request Access (RA-3096)
Status: Submitted

Please Select An Option

Accept Reject

Role Selection Organization Personal Information

Role Selection
User Role



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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.

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.

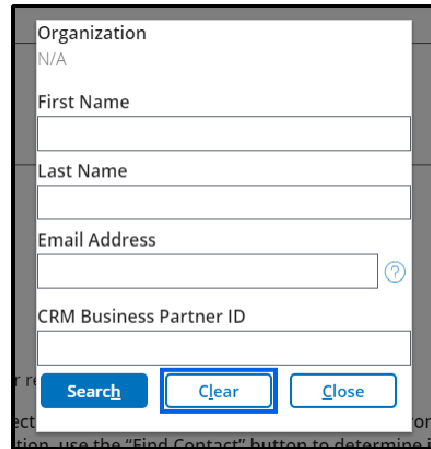


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3. In the **Find Contact** popup window, complete at least one **Search Criteria** field and click the **Search** button.

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.



The image shows a 'Find Contact' popup window. It contains several input fields: 'Organization' (with 'N/A' entered), 'First Name', 'Last Name', 'Email Address' (with a help icon), and 'CRM Business Partner ID'. At the bottom, there are three buttons: 'Search', 'Clear', and 'Close'.

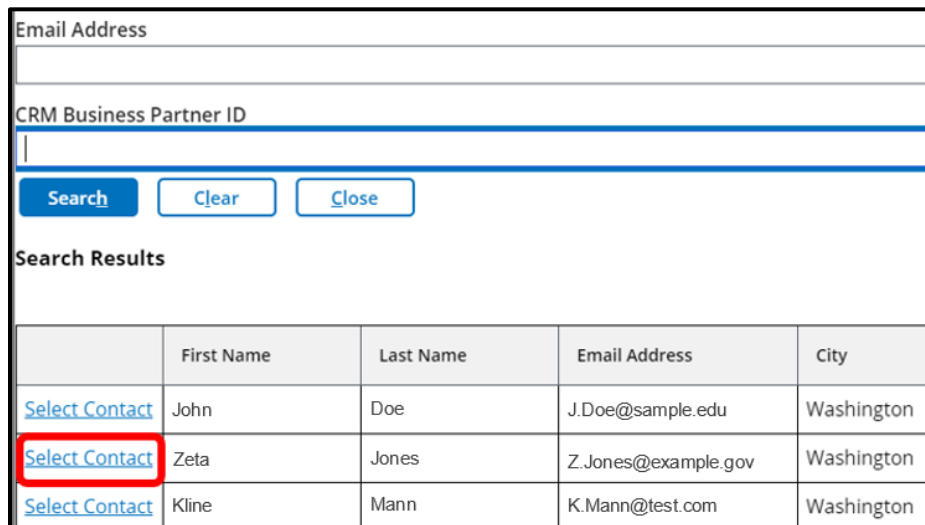
4. Review the **Search Results** table to determine if any of the retrieved records are a match.

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.



The image shows the 'Search Results' section of the popup window. It contains a table with the following data:

	First Name	Last Name	Email Address	City
Select Contact	John	Doe	J.Doe@sample.edu	Washington
Select Contact	Zeta	Jones	Z.Jones@example.gov	Washington
Select Contact	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
Find Contact **Clear Contact Selection**

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



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Finalize Decision

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

Please Select An Option ▾ **Submit**

Accept

Acceptance Comments

Role Selection

* User Role ?

Signatory Official ▾

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

Request Access (RA-3096)

Status:
Submitted

Please Select An Option ▾ **Submit**

Accept

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

Request Access (RA-3096) **Print** **Close**

Status:
Approved

Access Request RA-3096 has been approved.

Role Selection Organization Personal Information

Role Selection

User Role

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.

Date	Changes Made
Feb. 2025	Updated the hyperlinks and dates
Mar. 2024	Removed Broken Links, Added eAuthenticain/Login.gov FAQs links
Apr. 2022	Removed Broken Links
Jan. 2022	Updated OCFO Website link
May 2019	Initial document created