This document provides instructions for external users to submit an initial Role Assignment Request which is required to view information (such as opportunities and agreements) and complete grants- and agreements-related tasks in ezFedGrants.

If you already have access to ezFedGrants, you can join additional organizations through your user profile. Refer to the Working with Multiple Organizations in ezFedGrants Quick Reference for more information.

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) numbers, 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 verified-identity Account
- The UEI number or other organization ID for all organizations you will represent in ezFedGrants

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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.
1. Launch the ezFedGrants External Portal (from the [OCFO ezFedGrants website](https://example.com)) and log in with your Login.gov verified-identity Account.
Note: For questions regarding ezFedGrants access, including logging-in and eAuthentication, please review the [ezFedGrants FAQs general](#).

2. Click the **Create Role Assignment Request link** when you reach the **ezFedGrants External Portal Home** screen.

   Note: If you see other tiles, such as **Opportunities**, **Applications**, and **Claims**, instead of the **Role Assignment Request** link, then you already have access to ezFedGrants. You can submit a Role Assignment Request for additional organizations through your **User Profile** (click your **Initials** in the upper-right corner and then select **Profile** on the dropdown menu).
Select Role

First, you must select a primary user role. The actions available for each primary user role are summarized below. Please refer to the ezFedGrants External Portal User Roles Quick Reference for complete definitions.

- **Grants Administrative Officer (GAO):** Prepares applications, claims, repayment requests, and reports. Can sign reports, repayment requests, and claims. Manages user roles, access, and work items for other users within the same organization.
- **Grants Processor (GP):** Prepares applications, claims, repayment requests, and reports. Can sign reports, repayment requests, and claims.
- **Signatory Official (SO):** Prepares reports. Signs applications, agreements, and amendments. Can sign reports, repayment requests, and claims.

You can only have one primary user role and your role will be the same for all organizations.

If you select the wrong role, you can edit your request, or the reviewer can change your assigned role when reviewing your Role Assignment Request. If the reviewer approves your request with the incorrect role, your role can be changed by a user with the GAO role. Please refer to the ezFedGrants Role and Access Management Job Aid for more information.

1. On the Role Assignment Access screen, select **Grants Administrative Officer, Grants Processor, or Signatory Official** from the User Role field dropdown menu.
   
   If you select the Grants Administrative Officer (GAO) role, select an agency from the Agency field dropdown menu. This agency will review your Role Assignment Request if you request access for an organization that does not already have ezFedGrants users or does not have a current GAO. Furthermore, this field does not affect your ezFedGrants access, it is simply for access approval purposes.

2. In the Access Request Comments text box, explain why you are submitting this Role Assignment Request or why you have requested a particular role.

3. Click the [Next] button.
Now you must select at least one organization for which you will complete grants and agreements management activities in ezFedGrants (submitting applications, claims, reports, etc.). You can be affiliated with multiple organizations, but you do not have to include every organization on your initial Role Assignment Request. Refer to the [Working with Multiple Organizations in ezFedGrants Quick Reference](#) for more information.

In the ezFedGrants System, each organization is identified by a unique ID, such as a UEI number. Small organizations may have only one UEI number, but larger organizations may have multiple UEI numbers under a single institutional umbrella (such as separate departments or campuses of a single university).

After your Role Assignment Request is approved, if you selected the wrong organization, separate from an organization, or otherwise no longer require ezFedGrants access for an organization, a user with the GAO role can deactivate your access for that organization.

1. On the **Role Assignment Request** screen, click the **Add Organization** button to open the **Search Organization** popup window.

2. In the **Search Organization** popup window, complete at least one **Search Criteria** field. It’s encouraged to enter your organization UEI only in the search criteria and then click the **Search** button.

The **Organization** field will search by organization title as it appears in the ezFedGrants System, which is derived from SAM.gov and/or IRS records. If you are unsure of your organization’s registered title, please use another field.
Role Assignment Request

Job Aid

3. Locate your organization in the **Search Results** table, confirm that the details are correct (some organizations have multiple records or similar names/IDs), and then click the **Join Organization** link.

If the search does not return the correct record (or any record) for your organization, try changing your search criteria, double-check the UEI number or other ID on your organization’s SAM.gov record, or contact the ezFedGrants Help Desk through the **Contact USDA** link on the left-side menu.

4. Upon clicking **Join Organization**, the **Search Organization** popup window will close, and the selected organization’s details will appear on the **Role Assignment Request** screen.

Complete the **Point of Contact Details** fields to identify a Point of Contact (POC) who can confirm your affiliation with this organization and/or your need for ezFedGrants access.

**Note:** If you selected the wrong organization, click the **[Remove]** button.
5. Only one organization is required to submit a Role Assignment Request; however, if you are affiliated with multiple organizations (i.e. UEI numbers), you may wish to include all your organizations on this Role Assignment Request. Alternately, you can join additional organizations through your User Profile any time after your initial Role Assignment Request is approved.

Click the [Add Organization] button (at the bottom of the screen) to add another organization. Repeat until you have added all organizations. You must enter POC details for each organization even if they all have the same POC.

6. Once you have added all organizations you wish to include with your Role Assignment Request, click the [Next] button.
Finalize Role Assignment Request

1. On the Role Assignment Request screen, complete the various Work Contact Information fields. At minimum you must complete the Occupation, Work Street Address, City, State, Postal Code, Work Phone, and Work Email fields. Required fields are indicated with a red asterisk.

2. Click the [Submit] button to submit your Role Assignment Request.

3. Upon successful submission, you will see a confirmation message and a list of reviewers who have received your Role Assignment Request. If you included multiple organizations, you will see a separate list of reviewers for each organization.
Role Assignment Request
Job Aid

“No Grants Administrative Officer (GAO)” Error: This error occurs if you select the Grants Processor (GP), or Signatory Official (SO) role and you select an organization for which there are currently no ezFedGrants users or the organization does not currently have a GAO. The first user to submit a Role Assignment Request for an organization in ezFedGrants must select the GAO role; therefore, no one can submit GP or SO Role Assignment Request for this organization until the GAO’s Role Assignment Request is approved (by a USDA agency). If you see the “No GAO” error, you must either remove the organization from your Role Assignment Request (and select a different organization, if your request only includes one organization), or change the role request to GAO, or discard the Role Assignment Request and wait until a GAO has been approved.

4. Close and verify the Role Assignment Request for your organization in progress. You should receive a confirmation email when your Role Assignment Request is approved. If you included multiple organizations on your Role Assignment Request, each organization must be approved separately; however, you will have access to ezFedGrants as soon as one organization is approved (you will only have access to agreements and other actions for approved organizations).

5. When your Role Assignment Request is approved by your organization GAO or the USDA Agency representative, you can verify the role associated with your account simply by logging into ezFedGrants, click on your name displayed in the top right-hand corner, then click on “Switch Roles” from drop down menu as depicted in screenshot below.
After submitting the Role Assignment Request, users will have the ability to review their role assignment requests if needed. Below are the steps to review your submitted Role Assignment Request.

1. Click on your request link and select **Review Request**.

![Role Assignment Request](image1)

2. You can review your submitted **Role Assignment Request** as below:

![Role Assignment Request](image2)
The user will have the option to edit their role assignment request once submitted.

1. Click on the Role Assignment Request Number Link and select Edit Role.

2. You can select a different User Role from the dropdown menu. Enter text into the Role Assignment Request Comments box and select Submit.
This section demonstrates how to view the person(s) assigned to approve a Role Assignment Request.

1. To view the person(s) assigned to approve a Role Assignment Request, click on the Request Link, and select View Approvers from the dropdown list.

2. The list of Approvers will be displayed in a pop-up window.
This section demonstrates how to withdraw a submitted Role Assignment Request.

1. To withdraw a Role Assignment Request, click on the desired request link and select Withdraw Request.

2. Enter explanation into the Notes field and click Submit.
The “Unavailable Organization Approver” option is only used when the GAO for your organization is unavailable to approve your request and you have requested the GAO role. Below are the steps to reroute your request to the agency.

1. Click on the **Role Assignment Request** link and select **Unavailable Organization Approver**.

2. If your organization’s GAO has not signed in within the last two weeks, you will be presented with the below screen. Select the **Re-Route Request** check box. Click **Submit**.
3. Your **Role Assignment Request** will show that the request has been rerouted to the agency for approval.

4. If there is a GAO that has signed in within the last two weeks, you will see this screen. If there is no approver available, please contact the ezFedGrants help desk at ezfedgrants-cfo@usda.gov.
See Also

Job Aids

- Using ezFedGrants - The Basics Job Aid
- eAuthentication Account Creation Job Aid
- ezFedGrants External Portal User Roles Quick Reference
- Working with Multiple Organizations in ezFedGrants Quick Reference

ezFedGrants Hyperlinks

- ezFedGrants Home page
- ezFedGrants FAQs general

External Hyperlinks

- SAMs for Unique Entity Identifier

Need Help?
Contact: ezfedgrants-cfo@usda.gov

Version Control

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<td>Oct 2023</td>
<td>Updated Verbiage and Screenshots to reflect the new enhancement in Pega.</td>
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<tr>
<td>Abael Solomon</td>
<td>May 2023</td>
<td>Updated Verbiage and Screenshots</td>
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