



# ezFedGrants External Portal Access Request Submission Job Aid



## Purpose

This job aid provides details for external users on requesting access to the ezFedGrants External Portal.

The term external user refers anyone who is not an internal staff person for a USDA awarding agency. A non-exhaustive list of potential external users includes: grant recipients, members of cooperator organizations, and/or anyone involved with grant applications, awards management, claim or report submission, or any other aspect of the grants process

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## Trigger

Perform this procedure when you require access to the ezFedGrants External Portal.

## Prerequisites

- You must have an eAuthentication Level 2 account.
  - Please refer to the **eAuthentication Level 2 Account Creation Job Aid** for more information.
- If you are the first individual from an organization to request access:
  - You must request the Grants Administrative Officer (GAO) role.
  - The first user’s access request will be reviewed by a USDA Agency Grants Management Officer (AGMO)
  - Once a user has been granted access, access requests will no longer be reviewed by USDA AGMOs.
  - The initial user will review all subsequent access requests, including additional GAOs.
  - Once an additional GAO is granted access, the additional GAO may also review access requests.
- If you are requesting the Grants Processor, Signatory Official, or Reviewer Role:
  - Before you can request access as a Grants Processor, Signatory Official, or Reviewer, your organization must have at least one user with the Grants Administrative Officer (GAO) role.



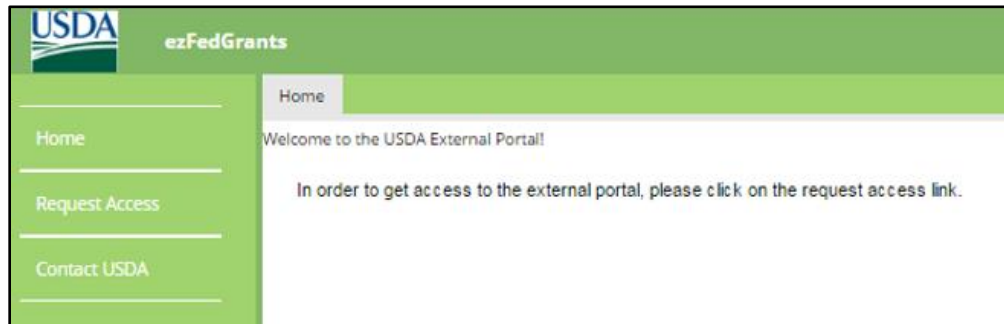
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## Menu Path

Use the following menu path to begin this procedure:

- [Launch ezFedGrants](#) > **eAuthentication** > **ezFedGrants External Portal Home Screen**



## Helpful Hints

- Before contacting the Help Desk, please refer to the **External Portal FAQ – Access, Permissions, and Roles** document. This document addresses many questions users have about access requests, organizations in the ezFedGrants System, permissions, and user roles.
- Please refer to the **ezFedGrants External Portal User Role Definitions** document to determine which role is commensurate with your job functions.
- All external users follow the same general procedure for submitting access requests, regardless of requested role.
- At this time, your ezFedGrants External Portal profile may only be linked to one unique organization ID (such as a DUNS).
  - Please refer to the **External Portal FAQ – Access, Permissions, and Roles** for more information on organizations with multiple IDs.
- If you have transferred organizations:
  - The GAO for your prior organization must deactivate your ezFedGrants External Portal access so that you may submit a new access request for the new organization.
  - You may need to update your eAuthentication Account contact information.
- On certain screens you may need to scroll to view additional data fields.
- Fields with an asterisk (\*) are required.
- Certain screenshots may display only a portion of the screen. Note that when working within a system, only the center body of the screen will change. The navigation options along the left side of the screen and the header bar across the top of the screen will remain the same.

**Note:** Data used in this procedure is a representative sample for the purpose of training. Actual data in the system may vary based on agency and scenario.

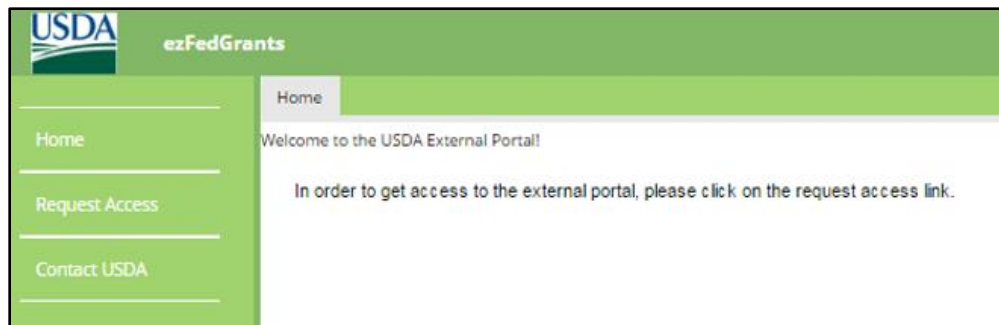


**Procedure**

**Initiating the Access Request Process**

1. Start the procedure by accessing the **ezFedGrants External Portal Home** screen.

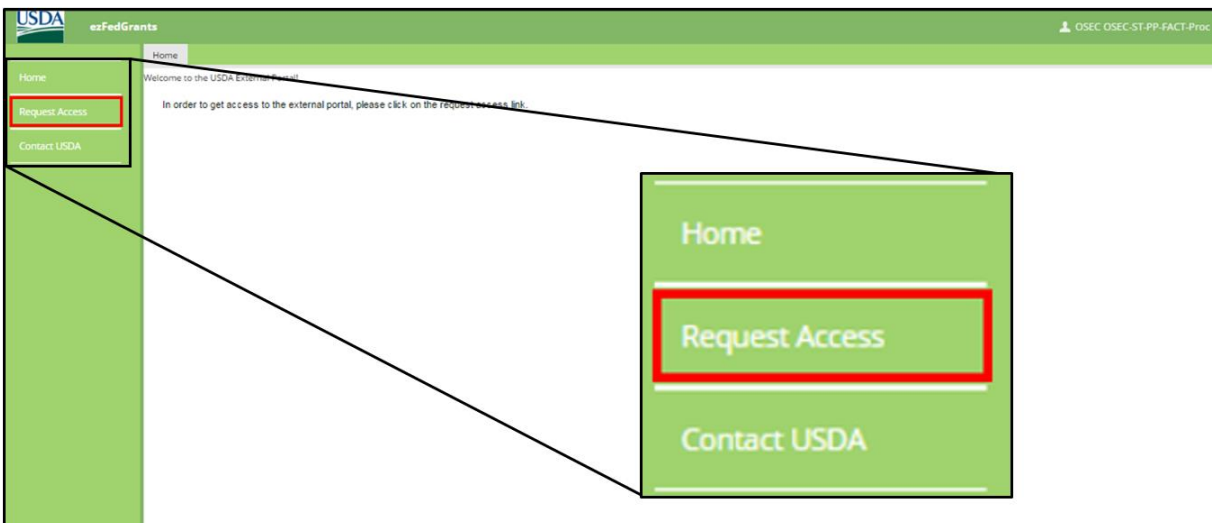
**Note:** Once you have full access to the ezFedGrants external portal, you will see five boxes (referred to as **Action Tiles**) and a **News and Notes** section on the **Home** screen, and additional menu options on the left-hand navigation menu. If you already see these items upon logging in, you already have access to the ezFedGrants External Portal.



2. Click the **Request Access** tile on the left-hand navigation menu. This will open the **Request Access** screen.

If you do not see a **Request Access** link, you already have access to the ezFedGrants External Portal. If you need to change roles or organizations, please refer to the **ezFedGrants External Portal User Role Management Job Aid**.

**Note:** In some cases the navigation menu may be collapsed. Click the icon in the top left corner of the screen to display the navigation menu.





## The Access Request Process

There are three stages to submitting an access request, indicated by the blue circles at the top of the **Request Access** screen: **Role Selection**, **Organization**, and **Personal Information**.

### Stage One: Role Selection

In the first stage you will indicate your desired user role.

Please refer to the **ezFedGrants External Portal User Role Definitions** document to determine which user role is commensurate with your grants-related duties.

If you select the wrong role, **do not submit another access request**. The reviewer has the ability to change your assigned role when reviewing your access 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 External Portal User Role Management Job Aid** for more information.

1. On the **Request Access** screen, click the **User Role** field to view the dropdown menu of available user roles. Click your desired role on the **User Role** dropdown menu.

If you select the Grants Administrative Officer (GAO) role:

- Upon selecting the **Grants Administrative Officer** option from the **User Role** dropdown menu, an additional field will appear where you must designate a USDA Agency to review your access request.
  - This field is required because the first ezFedGrants user for an organization must request the GAO role, and the first request is always reviewed by a USDA Agency Grants Management Officer (AGMO).
  - This field defaults to Foreign Agriculture Service (FAS). If you do not select another agency and your organization does not already have a GAO, your request will be sent to an FAS AGMO.
  - Selection of an agency **does not limit your External Portal access**. It is only for purposes of reviewing your access request. External Portal profiles **are not** tied to any specific agency.

**Note:** The **User Role** field defaults to the **Grants Processor** option.

Request Access RA-533

Status: Draft

1 Role Selection 2 Organization 3 Personal Information

Role Selection

\* User Role Grant Processor

Additional Information



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2. In the **Justification Narrative** text box, type and explanation for the particular role you have requested, or your reason for requesting access in general.

The screenshot shows the 'Request Access RA-533' form. The status is 'Draft'. A progress bar indicates three steps: 1. Role Selection (active), 2. Organization, and 3. Personal Information. Under 'Role Selection', the 'User Role' dropdown is set to 'Grant Processor'. A red box highlights the 'Justification Narrative' text area, which contains the text 'I am a grants processor for the university'. A callout box on the right provides a magnified view of this text area. In the top right corner, there are 'Print' and 'Next >>' buttons.

3. Once you have selected your role and provided justification comments, click the **Next** button to move to stage two of access request submission: **Organization**.

This screenshot shows the same 'Request Access RA-533' form, but now the 'Organization' step (2) is active in the progress bar. The 'User Role' dropdown remains 'Grant Processor' and the 'Justification Narrative' text area still contains 'I am a grants processor for the university'. A red box highlights the 'Next >>' button in the top right corner. A callout box on the right provides a magnified view of the 'Print' and 'Next >>' buttons.



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## Stage Two: Organization

In the **Organization** stage of access request submission, you will indicate the organization you are affiliated with.

1. Click the **Find Organization** button to open the **Search Organization** popup window and search for your organization.

**Note:** At this time, your ezFedGrants External Portal profile may only be associated with one unique organization ID (such as a DUNS). If your organization has more than one ID, please double check the **Organization Details** fields to ensure you have selected the correct organization.

The screenshot shows the 'Request Access RA-533' form. The status is 'Draft'. The progress bar shows three steps: 1. Role Selection, 2. Organization (current), and 3. Personal Information. The 'Organization Details' section includes fields for CRM Organization ID, DUNS Number, Organization, State, Phone, and Postal Code. A red box highlights the 'Find Organization' button. A larger red box highlights the 'Find Organization' button in the 'Search Organization' popup window.

2. In the **Search Organization** popup window, complete at least one **Search Criteria** field.

The available **Search Criteria** fields are:

- **CRM Organization ID:** This is the same as your USDA Financial Management System (FMMI) vendor code.
  - If you are unsure if your organization's CRM Organization ID/FMMI vendor code, please use another field.
- **DUNS Number**
- **Organization:** This field is based on your organization's title as it has been entered in the ezFedGrants System, which is derived from SAM and/or IRS records.
  - If you are unsure of your organization's registered title, please use another field.
- **City, State, Postal Code, and Country:** These fields are based on your organization's address as entered in the ezFedGrants System.

The screenshot shows the 'Search Organization' popup window. The title is 'Select Organization'. The 'Search Criteria' section includes fields for CRM Organization ID, DUNS Number, Organization, City, State, Postal Code, and Country. A red box highlights these fields. There are 'Search' and 'Clear' buttons at the bottom.



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3. Click the **Search** button to execute your search.

The screenshot shows a 'Search Organization' popup window. Under the 'Select Organization' heading, there are search criteria fields: CRM Organization ID, DUNS Number, Organization, City (with 'Davis' entered), State (dropdown), Postal Code, and Country (dropdown). At the bottom left, the 'Search' button is highlighted with a red box, and a 'Clear' button is next to it.

4. Locate your organization in the **Search Results** table, and click the **Join Organization** link. Clicking a **Join Organization** link will close the **Search Organization** popup window.

If your organization does not appear in the **Search Results** table:

- Please try modifying your search criteria and searching again.
- Confirm the organization details with others in your organization.
- Contact a USDA Agency Point of Contact for assistance.
  - Please provide the relevant DUNS and CAGE numbers for your organization with your communication.

The screenshot shows the 'Search Organization' popup window after a search. The search criteria fields are visible. Below the search criteria, there is an 'Export' button. Under the 'Search Results' heading, there is a table with one row of results. The 'Join Organization' link in the first column of the table is highlighted with a red box.

| Organization  | Street Numbe     | Cit   | St | Postal Cc  | Phone numl     | Count |
|---|------------------|-------|----|------------|----------------|-------|
| <a href="#">Join Organization</a> CALIFORNIA DAIRY RESEARCH FOUNDATIO N | 501 G ST STE 203 | DAVIS | CA | 95616-3820 | (202) 908-0987 | US    |



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- Once you have clicked the **Join Organization** link, the fields in the **Organization Details** section will automatically populate with the selected organization's information.

Review the **Organization Details** fields to ensure you have selected the correct organization, particularly if your organization has multiple registrations. If your request is approved with the incorrect organization affiliation, your access must be deactivated and you will need to submit a new access request.

Click the **Find Organization** button if you need to repeat the organization search.

Once you have confirmed you have selected the correct organization, click the **Next** button to proceed to stage three of access request submission: **Personal Information**.

The screenshot shows a web form titled "Request Access RA-533". At the top right, there are three buttons: "Print", "<< Previous", and "Next >>". The "Next >>" button is highlighted with a red box. Below the title, the status is "Draft". A progress indicator shows three steps: "1 Role Selection", "2 Organization", and "3 Personal Information". The "Organization" step is currently active. Below the progress indicator, there is a "Find Organization" button. The "Organization Details" section contains several input fields with the following data:

|                     |                                       |             |                  |
|---------------------|---------------------------------------|-------------|------------------|
| CRM Organization ID | 1102208303                            | Address     | 501 G ST STE 203 |
| DUNS Number         | 805866134                             | City        | DAVIS            |
| Organization        | CALIFORNIA DAIRY RESEARCH FOUNDATIO N | State       | CA               |
| Phone               | (202) 908-0987                        | Postal Code | 95616-3820       |

At the bottom left, there is a link for "Additional Information". A larger callout box in the center of the screenshot highlights the "Print", "<< Previous", and "Next >>" buttons, with the "Next >>" button being the most prominent.





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## Stage Three: Personal Information

In the **Personal Information** stage, the final stage of access request submission, you will provide contact and basic identity information for yourself and a point of contact (POC) within your organization.

1. In the **POC Details** section, you will provide information for your point of contact.

Click in the **School/Dept/Div/Prog** field and type your point of contact's school, department, division, and/or program within your organization.

**Note:** Your POC should be someone within your organization, typically a supervisor, who can confirm the information provided on your access request (namely, your association with the organization and your need for access).

The screenshot shows the 'Request Access RA-533' form. The status is 'Draft'. A progress bar indicates three steps: 1. Role Selection, 2. Organization, and 3. Personal Information. The 'POC Details' section is expanded, showing the following fields: Organization (CALIFORNIA DAIRY RESEARCH FOUNDATIO N), School/Dept/Div/Prog (School of Agriculture), Supervisory Point of Contact (POC) (empty), POC Email (empty), and POC Phone (empty). A red box highlights the 'School/Dept/Div/Prog' field. A callout box provides a larger view of the 'POC Details' section, showing the 'School/Dept/Div/Prog' field with 'School of Agriculture' entered.

2. Click in the **Supervisory Point of Contact (POC)** field and type your point of contact's first and last name.

The screenshot shows the 'Request Access RA-533' form. The status is 'Draft'. A progress bar indicates three steps: 1. Role Selection, 2. Organization, and 3. Personal Information. The 'POC Details' section is expanded, showing the following fields: Organization (CALIFORNIA DAIRY RESEARCH FOUNDATIO N), School/Dept/Div/Prog (School of Agriculture), Supervisory Point of Contact (POC) (Jane Doe), POC Email (empty), and POC Phone (empty). A red box highlights the 'Supervisory Point of Contact (POC)' field. A callout box provides a larger view of the 'Supervisory Point of Contact (POC)' field with 'Jane Doe' entered.



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3. Click in the **POC Email** field and type your point of contact's email address.

The screenshot shows a form titled "POC Details" with the following fields: Organization (CALIFORNIA DAIRY RESEARCH FOUNDATIO N), School/Dept/Div/Prog (School of Agriculture), and Supervisory Point of Contact (Jane Doe). A red box highlights the POC Email field, which contains the text "jane.doe@gmailtest.com". Another red box highlights the POC Phone field, which is currently empty.

4. Click in the **POC Phone** field and type your point of contact's phone number.

The screenshot shows the same "POC Details" form. A red box highlights the POC Phone field, which now contains the number "2028675309". The POC Email field remains highlighted with a red box and contains "jane.doe@gmailtest.com".

5. Locate the **Work Contact Information** section. In this section you will enter details about yourself, *not* your POC.

**Note:** Some fields may be pre-populated based on your eAuthentication Account.

The screenshot shows a form titled "Request Access RA-533" with a "Supervisory Point of Contact" field containing "Jane Doe". A red box highlights the "Work Contact Information" section, which includes the following fields: Title (dropdown menu), Academic Title (dropdown menu), First Name (pre-populated with "OSEC"), Middle Name (empty), Last Name (pre-populated with "OSEC-ST-PP-FACT-Proc"), Professional Title (empty), and Street (empty).



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6. Click in the **Professional Title** field and type your professional title within your organization.

**Note:** If your organization uses alternate grants-specific titles, you may wish to use that title here.

The screenshot shows the 'Work Contact Information' section of a form. The 'Professional Title' field is highlighted with a red box and contains the text 'Grants Processor'. A magnified view below shows the 'Professional Title' field with a red border and the text 'Grants Processor'.

7. Click in the **Street** field and type your work street address.

**Note:** Entries in the **House Number** field cannot exceed ten characters.

The screenshot shows the 'Work Contact Information' section of a form. The 'Street' field is highlighted with a red box and contains the text '9999 Gantry Road'. A magnified view below shows the 'Street' field with a red border and the text '9999 Gantry Road'.

8. Click in the **City** field and type your work address city.

The screenshot shows the 'Work Contact Information' section of a form. The 'City' field is highlighted with a red box and contains the text 'Arlington'. A magnified view below shows the 'City' field with a red border and the text 'Arlington'.



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9. Click in the **State** field and select your work address state from the **State** dropdown menu.

The screenshot shows the 'Request Access RA-533' form. The 'Work Contact Information' section is expanded. The 'State' field is highlighted with a red box, and a dropdown menu is open showing 'Virginia (VA)' selected. Other fields like 'First Name', 'Middle Name', 'Last Name', 'Street', 'House Number', 'City', and 'Postal Code' are visible but not highlighted.

10. Click in the **Postal Code** field and type your work address zip/postal code.

The screenshot shows the 'Work Contact Information' form. The 'Postal Code' field is highlighted with a red box and contains the value '22201'. Other fields like 'Title', 'Academic Title', 'First Name', 'Middle Name', 'City', 'State', 'Country', 'Country Code (Phone)', and 'Phone' are visible.

11. Click in the **Phone** field and type your work phone number using the format (XXX) XXX-XXXX

**Note:** The **Country Code (Phone)** field is only necessary if your work phone number is a non-US number.

The screenshot shows the 'Work Contact Information' form. The 'Phone' field is highlighted with a red box and contains the value '2028675309'. Other fields like 'Title', 'Academic Title', 'First Name', 'Middle Name', 'Last Name', 'Professional Title', 'Street', 'Postal Code', 'Country', and 'Country Code (Phone)' are visible.



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12. Click in the **Work Email** field, and type your work email address.

The screenshot shows a web form with the following fields and values:

- Professional Title: Grants Processor
- Street: 9999 Gantry Road
- House Number: [Empty]
- City: Arlington
- Work Email: john.doe@gmailtest.com (highlighted with a red border)
- Phone: (202) 867-5309
- Extension: [Empty]
- Country Code (Fax): [Empty]
- Fax: [Empty]
- Work Email (bottom): john.doe@gmailtest.com (highlighted with a red border)



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## Submitting the Access Request

1. Once you have completed the **POC Details** and **Work Contact Information** sections, click the **Submit** button to submit your access request.

**Note:** Click the **Previous** button to review the **Role Selection** and **Organization** stages of the access request. However, the **Submit** button is only available on the **Personal Information** stage.

The screenshot shows the 'Request Access RA-533' form. At the top right, there are buttons for 'Print', 'Submit', and '<< Previous'. The 'Submit' button is highlighted with a red box. Below this, a progress bar shows three steps: '1 Role Selection', '2 Organization', and '3 Personal Information', with '3' being the active step. The form is divided into two main sections: 'POC Details' and 'Work Contact Information'. The 'POC Details' section includes fields for Organization (CALIFORNIA DAIRY RESEARCH FOUNDATIO N), School/Dept/Div/Prog (School of Agriculture), and Supervisory Point of Contact (POC) (Jane Doe). The 'Work Contact Information' section includes fields for Title, Academic Title, and First Name (OSEC). On the right side of the form, there are input fields for POC Email (jane.doe@gmailtest.com) and POC Phone ((202) 867-5309). A callout box highlights the 'Print', 'Submit', and '<< Previous' buttons.

2. If your access request was submitted to the reviewer successfully, the system will display a confirmation message, as indicated in the below screenshot.

If the submission was unsuccessful, the system will display an error message.

The screenshot shows the 'Request Access (RA-533)' confirmation page. At the top right, there are buttons for 'Print' and 'Close'. The status is 'Submitted'. A red-bordered box highlights the confirmation message: 'Your request has been submitted to the administrator(s) listed below and your request will be emailed to you.' Below this, there is a table with the following data:

| Name                   | Email                 | Phone          |
|------------------------|-----------------------|----------------|
| OSEC OSEC-ST-GL-FI-Rep | CADairyGA01@gmail.com | (222) 222-2222 |

Below the table, there is a section for 'Request Access' with tabs for 'Role Selection', 'Organization', and 'Personal Information'. The 'Role Selection' tab is currently selected.

3. If the reviewer approves your request, you will receive a confirmation email and will be able to access the full ezFedGrants External Portal for your organization.

If the reviewer rejects your request you will need to submit a new access request. You may or may not receive an email notifying you of the rejection.



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Job Aid



**Comments**

**Additional Information**

Refer to the following additional materials:

- ezFedGrants External Portal Onboarding and Basics Job Aid
- eAuthentication Level 2 Account Creation Job Aid
- ezFedGrants External Portal User Role Definitions
- Onboarding and Accessing ezFedGrants FAQs

**Version Control**

| Name         | Date               | Changes Made  |
|--------------|--------------------|---|
| April Murphy | Prior to 2/20/2017 | Initial Document Created  |
| April Murphy | 3/14/2017          | Purpose: Added heading styles; clarified information throughout<br>Procedure: Clarified information throughout; added subsection headings<br>Comments: Added subsection headings; added version control table<br>Throughout: Improve 508 alt text & image descriptions; corrected referenced job aid titles; updated document title; updated header and footer; updated document advanced properties.                   |
| April Murphy | 4/28/2017          | Procedure: The Access Request Process: Introduction: Added information about wrong role selection; Step 1: Clarified agency selection for GAO role; Stage 3 Personal Information Step 7: Added <b>Note</b> re: House Number field.  |
| April Murphy | 5/16/2017          | <b>Purpose:</b> Added Contents; added Launch ezFedGrants link to Menu Path<br><b>Comments:</b> Corrected document title<br><b>Procedure:</b> Initiating: Step 2: Added information re: no request access link; Stage One: Added reference to User Role Management job aid in intro; Stage Three: Step 11: Added format for phone number: Submitting: Step 1: Clarified <b>Note</b> , Step 3: Clarified rejection email. |
| April Murphy | 9/13/2017          | <b>Comments:</b> Updated document title   |