



ezFedGrants Overview and Basic Navigation

GM 306



Module 1

Course Introduction



Agenda



- Module 1 – Course Introduction
- Module 2 – ezFedGrants Overview
- Module 3 – ezFedGrants External Portal
- Module 4 – Course Summary





Course Overview



- The purpose of this course is to provide an overview of the ezFedGrants system and External Portal.
- This course is also designed to help users understand where to find help and training materials.





Introduction Instructor and Students



In the chat, please share your:

- Location
- Organization
- Role
- Expectations





Session Recorded



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

Thursday 2:45 PM Meeting ended: **3h 24m 38s**

ezFedGrants Agency Training
Tuesday, October 15, 2024 12:00 PM - 2:00 PM

[View recap](#)

Content

Transcript Internal I_Access-Intro.pptx +2

3 recordings



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.



Chat



Q&A



People



Raise



React



Polls



How to Get Answers to Your Questions



Login.gov

- For Login.gov, call (844) 875-6446. Operating hours are 24 hours a day, seven days a week.
- Login.gov: (844) 875-6446, [Login.gov FAQs](#)

ezFedGrants

- Contact the ezFedGrants Help Desk: ezFedGrants-cfo@usda.gov.
- [eFG Training Schedule](#)
- Attend a Frequently Asked Questions (FAQ) session.
- Recipient job aids: [Job Aid Library](#)



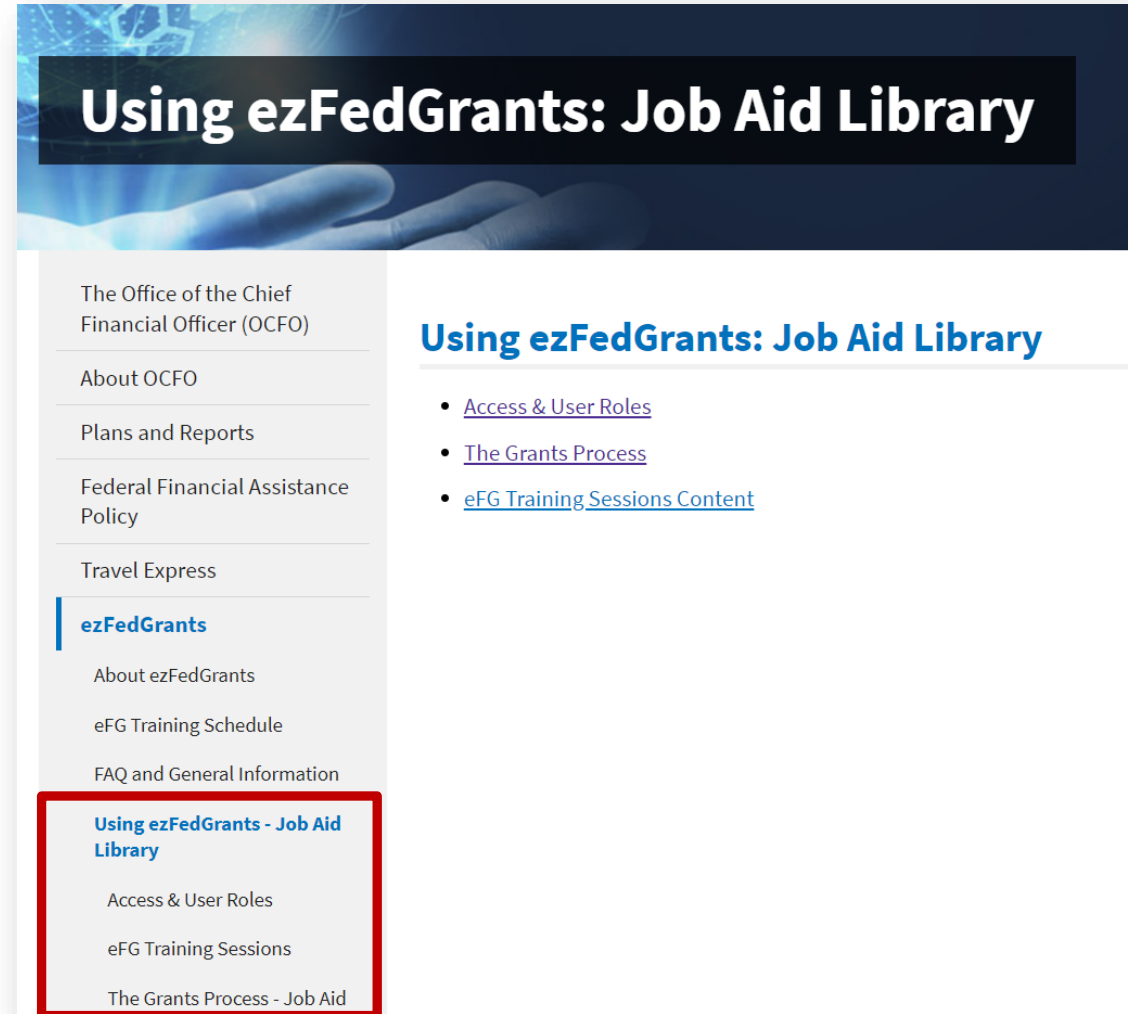
Bookmark or favorite these links!



Job Aid Library



- Visit the ezFedGrants website for support.
- Includes job aids, training session records and other useful information.
- [Using ezFedGrants: Job Aid Library](#)



Module 2

ezFedGrants Overview



Module 2 – ezFedGrants Overview Objectives



After completing this module, you should be able to:

- Explain the functionality, goals and benefits of ezFedGrants.
- Provide an overview of ezFedGrants.



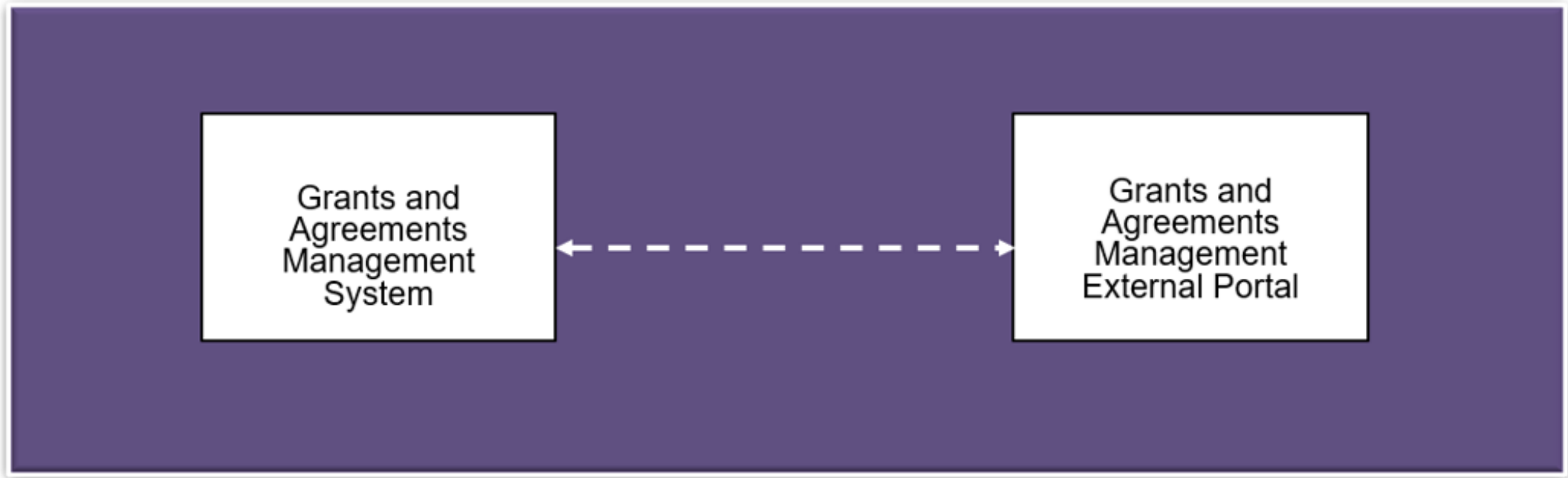


What is ezFedGrants?



USDA Agency Users

**Grants and Agreements
Partners**





Benefits of Using ezFedGrants



- Accurate data tracking of agreements, amendments, and claims
- Reduces the time required for grant-related operations associated with approvals and claims
- Allows for the standardization of grant execution and management
- Speeds up processing through electronic form submittal and approval
- Acts as a platform where USDA Agency users and Agreement Partners can communicate
- Uses an auto-fill feature, reducing errors



Grants Management Lifecycle



- eFG supports the full grants management lifecycle.
- This includes:
 - Searching for opportunities
 - Creating and submitting applications to opportunities
 - Managing agreements, including amendments
 - Submitting claims and progress reports
 - Closing out agreements

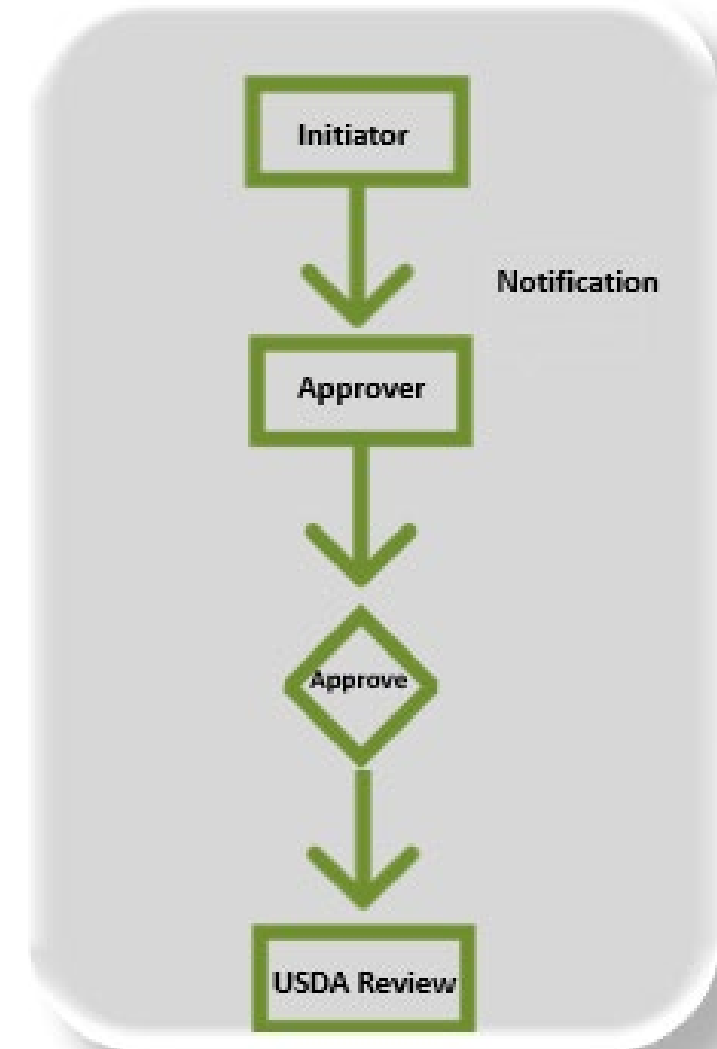




Approval Workflows and Notifications



- ezFedGrants uses workflow functionality to streamline the approval process.
- Workflow automatically sends an email and Portal notification to users within the approval process.
- The system sends notifications to the next assigned user within the recipient organization or USDA agency.

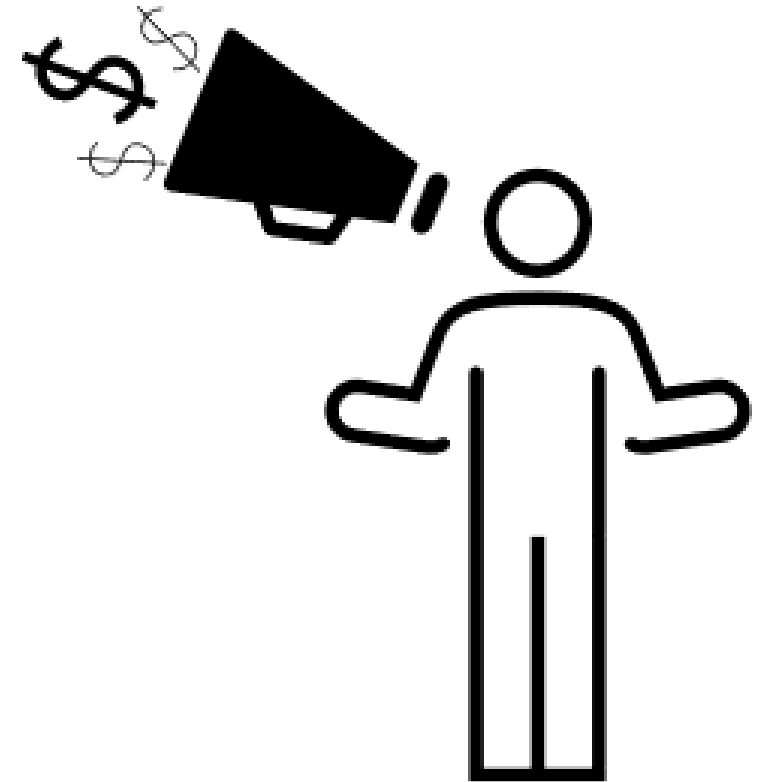




Opportunities



- Notice of Funding Opportunity Announcements (referred to as **NOFO** or **Opportunities**) publicly announce the availability of certain types of funding.
- Opportunities are published by USDA agencies in either ezFedGrants or on Grants.gov.
- Once an Opportunity is published, any external organization that would like to be considered for funding applies using either ezFedGrants or Grants.gov.

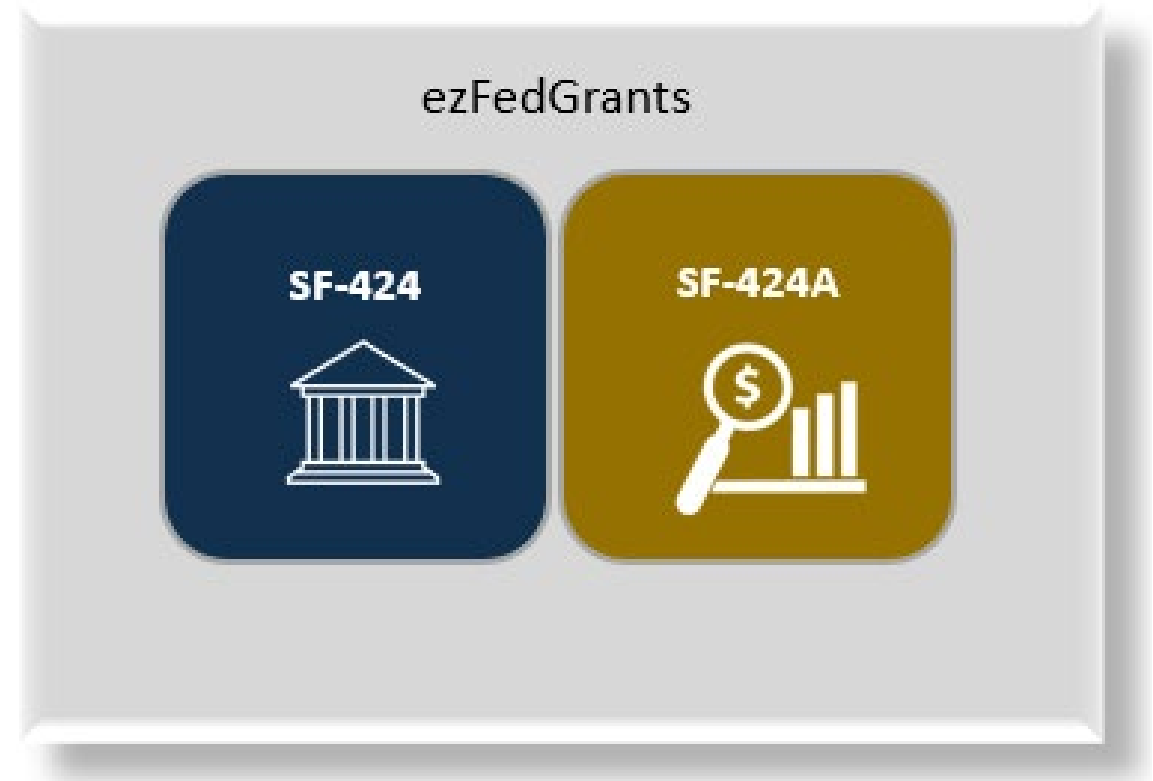




Applications



- Applications are based on opportunities published by USDA agencies.
- Application forms are built into the ezFedGrants system for electronic submission.
- Standard Form-424 (SF-424) is an application used by federal agencies for grant applications.
- The SF-424A Budget Information - Non-construction Programs form is also available to complete in the system.





Claims Processing



- ezFedGrants supports the claim process.
 - This includes creation, review, and approval of claim requests using funds from grant agreements.
- Advance claim and repayment requests are not supported in ezFedGrants and should be requested directly through the awarding agency.





Progress Reports



- ezFedGrants supports the submission of performance and financial progress reports.
- Report requirements and deadlines are specified in the Agreement.
- Recipients are automatically notified within the **Actionable Items** section on the **Home** screen when a report is due.
- Property reports are not supported in ezFedGrants, and instructions should be requested directly through the awarding agency.





Module 2 – ezFedGrants Overview Summary



You should now be able to:

- Provide an overview of ezFedGrants.
- Explain the functionality, goals and benefits of ezFedGrants.



Module 3

ezFedGrants External Portal



Module 3 – ezFedGrants External Portal Objectives



After completing this module, you should be able to:

- Explain how to navigate within the eFG External Portal.





ezFedGrants External Portal Home Page Dashboard



USDA egFedGrants

Header

Test Tester 3

Home

Opportunities

Applications >

Agreements

Amendments

Claims >

Reports

Work Item Reassignment

Work and User Reports

Manage Permissions

Contact USDA

Training/Guidance

Home

News and Notes

Test External 11/17/22 6:12 PM

Actionable Items

My Agreements

Notifications

Applications under Review

Amendments under Review

Claims under Review

Work Area

Navigation Menu



ezFedGrants External Portal Home Page Descriptions



Section	Description
Header	Includes user's name and a link to profile details
Navigation Menu	Navigate to Home, and view or search for Opportunities, Applications, Agreements, Amendments, Claims, and Reports Quick links: Contact USDA (ezFedGrants Help Desk) and Training/Guidance to ezFedGrants website Note: Work Item Reassignment, Work and User Reports, and Manage Permissions are only visible for Grants Administrative Officers (GAO)
Work Area	Expand or collapse each section to view News and Notes, Actionable Items, My Agreements, Notifications, Applications Under Review, Amendments Under Review, Claims Under Review



ezFedGrants External Portal Work Area Descriptions



Tile	Displays
News and Notes	Messages broadcasted about functionality updates, system outages, announcements or policy changes.
Actionable Items	List of transactions to be acted upon.
My Agreements	Provides a listing of all the organization's agreements.
Notifications	Displays list of messages for specific user related to status of Transactions, such as Claims and Applications.
Application under Review	Applications under review.
Amendments under Review	Amendments under review.
Claims under Review	Claims under review or awaiting Certifying Official signature.



ezFedGrants Home Page - Work Area

Actionable Items



- Actionable Items are viewed in a list format.
- Items can be filtered by **Category** or by clicking the triangle icon in each column.

▼ Actionable Items

Category

▼

Application

Claim

Role Assignment Request

Report

Electronic Signature - Amendment

Electronic Signature - Agreement

Transaction	FAIN/ID	Status	Due Date	Last Updated
RPT-3394	FX170200-10.C001-FI-Q2-19	Draft	7/30/19	2/14/25
RPT-3446	AP17ACXXXXXXE002-FI-Q2-21	Acceptance Pending Edits	6/24/21	2/14/25
RPT-2891	FX170200-10.C001-FI-Q3-21	Draft	7/9/21	2/14/25
APP-20992	NR179104CALIC007-PE-Q4-21	Not started	8/11/21	2/14/25
	NR187217XXXXC007-FI-Final-21	Not started	12/15/21	2/14/25
	NR173A750001G023-FI-Q4-20	Acceptance Pending Edits	10/2/20	2/14/25
		Draft		2/13/25

Clear Filter

☐ Application

☐ Claim

☒ Financial Report

☐ Performance Report

Apply Cancel



ezFedGrants Home Page - Work Area

My Agreements



All Agreements for your organization will be visible to all users within the organization.

Perform the following **Actions** using a direct link:

- View Agreement Details
- View Amendments
- View Award Document
- View Claims
- Create Claim
- View Reports

Home

News and Notes

Test External

11/17/22 6:12 PM

Actionable Items

My Agreements

FAIN	Status	Project Title	Recipient Contact Name	Period of Performance		Total Federal Award Amount	Actions
AP18ACXXXXXG003	Awarded	Test Cancelled Fund Validation	Patrick Rhodey 04	10/2/17	12/31/50	\$8,005.00	I want to - View Agreement Details - View Amendments - View Federal Award Document - View Claims - Create Claim - View Reports
NR183A750001C006	Awarded	O&M Test Claim document Postings - PC	Patrick Rhodey 04	10/26/17	3/31/19	\$19,500.00	I want to
AM180200-10.G002	Awarded	Test Agreement	sig off1001	7/19/18	6/2/19	\$5.00	I want to
NI18RREAFXXXG002	Awarded	Test ASAP 12	TEST GAO	9/28/18	9/30/99	\$13,471,543.00	I want to
NI18RREAFXXXG001	Awarded	Test ASAP 13	Sig Off	9/28/18	9/30/99	\$1,053,814.00	I want to
NR199104CALIG002	Awarded	Test NRCS Claim	GAO1 GAO1	10/8/18	7/31/25	\$25,000.00	I want to
AQ192501X443G001	Awarded	NRCS Regression Testing for OAO	GAO1 GAO1	10/17/18	10/31/25	\$10,000.00	I want to
AP19ACXXXXXE001	Awarded	Testing Alt.NICRA Rate	Patrick Rhodey 05	2/19/19	5/24/22	\$471.00	I want to
AP19PPQCPCPHSTY002	Awarded	Defect Testing 02/21/2019	ARS ARS-ST-GL-Admin	2/21/19	12/31/99	\$200.00	I want to



ezFedGrants Home Page - Work Area Notifications



View Message related to listed notification.

Home

News and Notes

Test External

11/17/22 6:12 PM

Actionable Items

My Agreements

Notifications

Transaction	Transaction ID	Status	Sent		Viewed
Claim	CLM-12157	Accepted for Payment Processing	11/25/24	View Message	✓
Claim	CLM-12156	Accepted for Payment Processing	11/25/24	View Message	✉
Claim	CLM-12154	Accepted for Payment Processing	11/25/24	View Message	✉
Claim	CLM-12155	Accepted for Payment Processing	11/25/24	View Message	✉
Application	APP-20995	Approved	11/22/24	View Message	✉
Application	APP-20995	Accepted/Recommended	11/22/24	View Message	✉
Application	APP-20995	Considered	11/22/24	View Message	✉



Editing Fields



- Gray fields are pre-populated from the agreement and cannot be edited.
- Gray fields could also be automatically populated later in the procedure.
- An entry can be made within white fields.

Gray Fields

Not Editable
Automatically Entered or
Not Determined Yet



White Fields

Entries Can be Made



System Required Fields

Red Asterisk by Field





Navigating Work Items



- **Save**- saves your work so far
- **Withdraw**- Cancels the work item so it can no longer be edited or forwarded in the workflow
- **Close**- Exits out of this particular work item
- **Transfer**- Transfers the item to another owner for editing
- **Next**- Advances to the next tab in the work item.
 - NB- When at the final tab, this button changes to either **Submit**, **Submit To Certifier**, or **Certify**, depending on workflow and earlier selections made

Save

Withdraw

Close

Transfer

Next >>



Search Criteria Example (Agreements) External Portal



Performance Start Date

Organization Name

Project Title
Organization
City
State
Postal Code
Country)

Primary POC Name

First Name
Last Name
Email Address

Agreement Title

Organization name associated with Agreement

Performance End Date

Status

Executed
Awaiting Grantee Acceptance
Pending Budget Execution
Pending Closeout
Suspended
Closed

Search Criteria options vary based on the search screen.

Search results can be sorted and filtered in the same way as the **Actionable Items** list.



Digital Signature Decision Dropdown



- Another navigational feature is the ability to sign electronically.
- Signatory Officials review and approve applications and amendments.
- Certifying Officials review and approve claims and award documents.
- Decision dropdown options vary based on the transaction being reviewed.

A screenshot of a web application interface. At the top, there is a blue-bordered box containing the text "Please Select An Option" followed by a downward-pointing chevron. Below this, a dropdown menu is open, showing three options: "Sign and Submit" (highlighted with a light blue background), "Return", and "Withdraw". To the left of the dropdown, the text "SF-424" is visible, and below it, the word "Application" is partially visible. The entire interface is set against a light gray background with rounded corners.



Summary

Module 3 – ezFedGrants External Portal



You should now be able to:

- Provide an overview of ezFedGrants.
- Explain the functionality, goals and benefits of ezFedGrants.





Get Answers to Your Questions



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ezFedGrants Overview Poll & Questions

