



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.



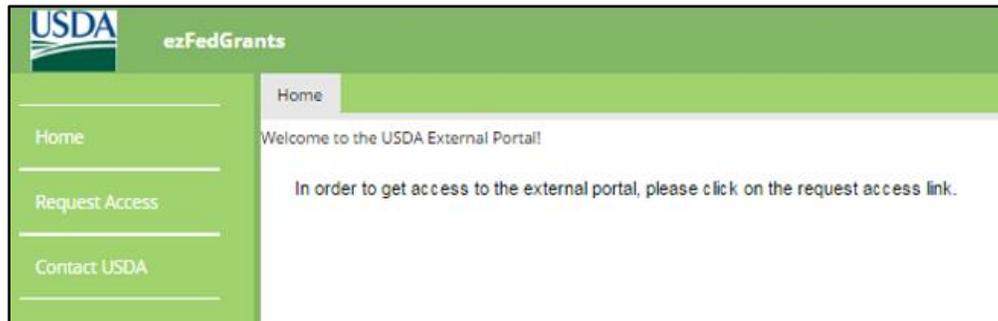
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Menu Path

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.

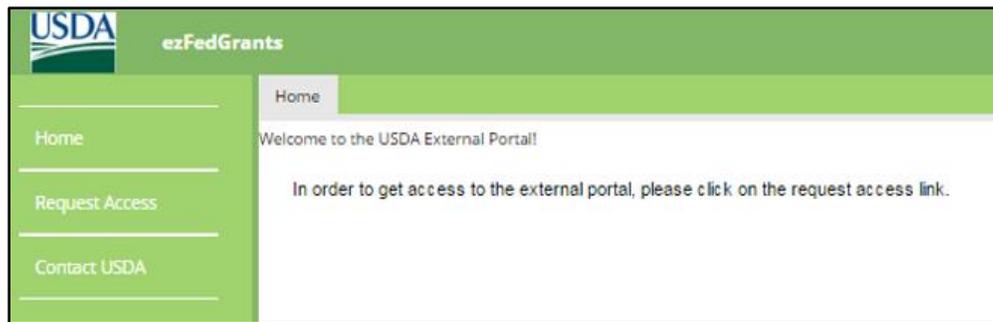


Procedure

Initiating the Access Request Process

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

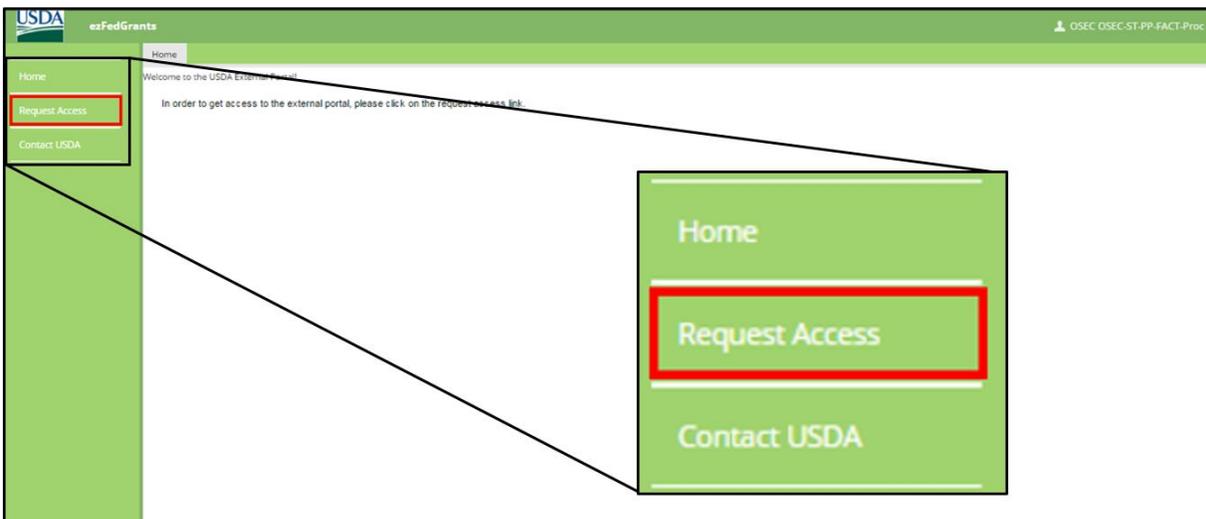
Note: Once you have full access to the ezFedGrants external portal, you will see five boxes (referred to as **Action Tiles**) and a **News and Notes** section on the **Home** screen, and additional menu options on the left-hand navigation menu. If you already see these items upon logging in, you already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

Status: Draft

1 Role Selection 2 Organization 3 Personal Information

Role Selection

* User Role Grant Processor

Organization Narrative

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.

Request Access RA-533

Status: Draft

1 Role Selection 2 Organization 3 Personal Information

Role Selection

User Role: Grant Processor

Justification Narrative

I am a grants processor for the university

Print Next >>

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**.

Request Access RA-533

Status: Draft

1 Role Selection 2 Organization 3 Personal Information

Role Selection

User Role: Grant Processor

Justification Narrative

I am a grants processor for the university

Print Next >>



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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. At the top right, there are 'Print', '< Previous', and 'Next >' buttons. The status is 'Draft'. A progress bar shows three steps: 1. Role Selection, 2. Organization (current), and 3. Personal Information. Below the progress bar, the 'Find Organization' button is highlighted with a red box. The 'Organization Details' section contains fields for CRM Organization ID, DUNS Number, Organization, State, Phone, and Postal Code.

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. It has a title bar with a close button. The main heading is 'Select Organization'. Below it, the 'Search Criteria' section is highlighted with a red box. It contains six input fields: CRM Organization ID, DUNS Number, Organization, City, State (dropdown), Postal Code, and Country (dropdown). At the bottom, there are 'Search' and 'Clear' buttons.



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

Search Organization

Select Organization

Search Criteria

CRM Organization ID State

DUNS Number Postal Code

Organization Country

City

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.

Search Organization

DUNS Number Postal Code

Organization Country

City

Search Results

Organization	Street Numbe	Cit	St	Postal Cc	Phone numl	Count
Join Organization 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 the following information:

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

Below the table, there is a link for "Additional Information".



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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. Below this, a larger view of the 'POC Details' section shows the same fields, with the 'School/Dept/Div/Prog' field again highlighted in red.

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. Below this, a larger view of the 'POC Details' section shows the same fields, with the 'Supervisory Point of Contact (POC)' field again highlighted in red.



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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. The POC Email field now contains "jane.doe@gmailtest.com". A red box highlights the POC Phone field, which now contains the number "2028675309".

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 the "Request Access RA-533" form. The "Supervisory Point of Contact" field is populated with "Jane Doe". Below this is the "Work Contact Information" section, which is highlighted with a red box. The fields in this section are: 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' label and the input field with 'Grants Processor' entered.

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' label and the input field with '9999 Gantry Road' entered.

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' label and the input field with 'Arlington' entered.



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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 include Title, Academic Title, First Name, Middle Name, Last Name, Street (5999 Gantry Road), House Number, City (Arlington), and Postal Code.

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 include Title, Academic Title, First Name (OSEC), Middle Name, House Number, City (Arlington), State (Virginia (VA)), Country (United States), Country Code (Phone), and Phone.

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 include Title, Academic Title, First Name (OSEC), Middle Name, Last Name (OSEC-ST-PP-FACT-Proc), Professional Title (Grants Processor), Street (5999 Gantry Road), Postal Code (22201), Country (United States), and Country Code (Phone).



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

The screenshot shows a web form with several input fields. The 'Work Email' field is highlighted with a red border in two locations: once at the top of the form and once at the bottom. The text 'john.doe@gmailtest.com' is entered in both instances. Other fields include Professional Title (Grants Processor), Street (9999 Gantry Road), House Number, City (Arlington), Phone ((202) 867-5309), Extension, Country Code (Fax), and Fax.



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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 contains sections for '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), Supervisory Point of Contact (POC) (Jane Doe), POC Email (jane.doe@gmailtest.com), and POC Phone ((202) 867-5309). The 'Work Contact Information' section includes fields for Title, Academic Title, and First Name (OSEC).

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 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'.

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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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 Procedure: Clarified information throughout; added subsection headings Comments: Added subsection headings; added version control table 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 Note re: House Number field.
April Murphy	5/16/2017	Purpose: Added Contents; added Launch ezFedGrants link to Menu Path Comments: Corrected document title Procedure: 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 Note , Step 3: Clarified rejection email.
April Murphy	9/13/2017	Comments: Updated document title