



Submitting Claims and Reports

GM 301





Agenda



- Course Introduction
- Module 1 – Creating and Submitting Claims
- Module 2 – Submitting Reports
- Course Summary



Introduction



- Name
- Role
- Training Purpose





Course Objectives



After completing this course, you will be able to:

- Summarize the ezFedGrants claims creation and submission process
- Describe the process for submitting and approving reports in ezFedGrants
- Understand additional training offerings and how to access training materials
- Navigate to and within ezFedGrants system





Agenda



- Course Introduction
- Module 1 – Creating and Submitting Claims
- Module 2 – Submitting Reports
- Course Summary



Objectives



After completing this module, you will be able to:

- Describe the ezFedGrants claims creation process
- Describe the ezFedGrants claims submission process
- Explain the functionality, goals and benefits of ezFedGrants





Creating and Submitting Claims



What's Needed?

- You must have access to ezFedGrants with a user role and permissions to create and/or certify (digitally sign) claims.
- The agreement you are making a claim against must be in **Active** status.
- In order to submit a new claim to your USDA agency, any previously created claims from your organization must have been fully submitted [digitally signed and submitted by the certifying official(s)] to your USDA agency or cancelled.
- Any overdue performance and/or financial progress reports must be submitted to your USDA agency before a claim can be submitted.
- For agreements allowing advance payments, your first advance payment request for that agreement is submitted as a normal claim. However, all subsequent advance payment requests for that agreement require a justification narrative for the previous advance payment. New advance payment requests cannot be processed by your USDA agency until the justification narrative has been provided for the prior advance payment.



Creating and Submitting Claims



Helpful Hints

- On certain screens you may need to scroll to view additional data fields.
- 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.
- When actually submitting a claim, it is recommended to fully review the claim forms, including fields not covered in this presentation, and contact your agency representative if you have any questions.

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.



Creating and Submitting Claims



USDA ezFedGrants

Home

Opportunities

Applications >

Agreements

Amendments

Claims >

Search Claims

Create Claim

Home

Actionable Items

Category

Transaction ID	Transaction	FAIN	Status
APP-5386	Application		Draft
APP-5565	Application		Draft
APP-5460	Application		Returned by Sig
AO172501X443G009-PE-Q2-19	Performance Report	AO172501X443G009	Not started
AO172501X443G009-FI-Q2-19	F		
AO172501X443C008-PE-Q2-19	P		
AO172501X443C008-FI-Q2-19	F		
NR17NRCSCENTC021-FI-Q2-19	F		
-PE-Final-17	Performance Report		Returned by Ce
QA-GA-17-011-PE-SA1-17	Performance Report	QA-GA-17-011	Not started
QA-GA-17-010-PE-SA2-17	Performance Report	QA-GA-17-010	Not started
QA-GA-17-003F-PE-SA2-17	Performance Report	QA-GA-17-003F	Not started
QA-GA-17-013-PE-Annual-17	Performance Report	QA-GA-17-013	Not started
QA-GA-17-013-PE-Final-17	Performance Report	QA-GA-17-013	Not started
NR17NRCSCENTC023-PE-Q2-19	Performance Report	NR17NRCSCENTC023	Acceptance Per

1 2 3 4 5 6 7 8 9 10 ... >

My Agreements

Notifications

Applications under Review

Amendments under Review

Claims under Review

Start by accessing the ezFedGrants Home screen, and select Create Claim.



Creating and Submitting Claims



Search Agreements Close

Search Criteria

FAIN NR18NRCSCENTG002	Project Title 	Period of Performance Start Date M/d/yyyy - M/d/yyyy	Recipient Contact Name N/A
Period of Performance End Date M/d/yyyy - M/d/yyyy	Status Awarded		

Search **Clear**

The **Search Agreements** screen will open. From here you may search for the agreement you would like to make a claim against. To begin, enter information about the relevant agreement in the available **Search Criteria** fields.

Once you have completed all applicable search criteria fields, click the **Search** button.



Creating and Submitting Claims



Locate the relevant agreement in the **Search Results** table and click the **Create Claim** link to initiate the claim creation process.

Search Agreements Close

Search Criteria

FAIN: Project Title: Period of Performance Start Date: - Recipient Contact Name:

Period of Performance End Date: Status:

Search Results Export

FAIN	Status	Project Title	Recipient Contact Name	Performance Start Date	Performance End Date	Total Federal Award Amount	Actions
NR18NRCSCENTG002	Awarded	Southwest Soil Conservation Initiative	Mark Davis	3/17/17	5/31/17	\$650.00	Create Claim



Creating and Submitting Claims



Once the **Create Claim** screen opens, the SF-270 will appear, prepopulated with information from the initial agreement. Complete the SF-270.

In **Box 1 Type of Payment Requested**, select either **Final** or **Partial**.

Create Claim CLM-2526

1. SF-270 2. Signature 3. Attachments

Claim Information:

1a. Request for Advance or Reimbursement

ADVANCE

REIMBURSEMENT

*** 1b. Type of Payment Requested:**

FINAL

PARTIAL

*** 2. Basis of Request**

CASH

ACCRUAL



Creating and Submitting Claims



Some fields are pre-populated from the associated agreement and cannot be edited. Grey fields will have auto-populated information or information that is yet to be determined. White fields or option buttons require input.

Create Claim CLM-2526 Print Save Cancel Next >>

1. SF-270 2. Signature 3. Attachments

Claim Information:

1a. Request for Advance or Reimbursement

ADVANCE

REIMBURSEMENT

*** 2. Basis of Request**

CASH

ACCRUAL

In Box 2 Basis of Request, select either Cash or Accrual.



Creating and Submitting Claims



Create Claim CLM-2526 Print Save Cancel Next >>

3. Federal Sponsoring Agency and Organizational Element to Which This Report is Submitted
Natural Resources Conservation Service

4. Federal Grant or Other Identifying Number Assigned by Federal Agency
NR18NRCSCENTG002

5. Partial Payment Request Number for this Request: N/A

6. Employer Identification Number: N/A

7. Recipient's Account or Identifying Number:

Boxes 3, 4, 5, and 6 are auto-populated and not editable. Box 7 is optional.



Creating and Submitting Claims



Create Claim CLM-2526

4. Federal Grant or Other Identifying Number Assigned by Federal Agency: NR18NRCSCENTG002

5. Partial Payment Request Number for this Request: N/A

6. Error Code: N/A

8. Period Covered By This Request

* From: 8/1/2019

* To: M/d/yyyy

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

10. Payee (Where check is to be sent if different than item 9)

Name: _____

Number and Street: _____

City: _____

State: _____

Zip: _____

In **Box 8 Period Covered by This Request**, enter the **From and To** fields. These dates must fall within the Period of Performance dates for the associated agreement.

Select a date from the calendar (click the **Calendar** icon in each field) or type the date in **MM/DD/YYYY** format.



Creating and Submitting Claims



Scroll to **Box 11 Computation of Amount of Reimbursements/Advances Requested** and enter the **As of Date** in Row A (Total Program Outlays to Date).

Enter the relevant dollar values in **Row A (Total Program Outlays to Date)** and **Row B (Cumulative Program Income)**. After completing one or both of these fields, **Row C (Net Program Outlays)** will automatically calculate (Row A minus Row B).

Claim Amount:						
11. Computation of Amount of Reimbursements/Advances Requested						
Programs/ Functions/ Activities	As of Date	(a) NR18NRCSCENTG002	(b) Agency Calculations (For your reference only)	(c) Programs/ Functions/ Activities	Total	
a. Total program outlays to date	M/d/yyyy					
b. Less: cumulative program income						
c. Net program outlays (line a minus line b)		\$0.00				\$0.00



Creating and Submitting Claims



Row E (Sum of Line C and D) and Row F (Non-Federal Share of Amount on Line E) will also auto-fill based on Row A, B, and C. Manually adjust the amount in Row F if necessary.

Claim Amount:
11. Computation of Amount of Reimbursements/Advances Requested

Programs/ Functions/ Activities	As of Date	(a) NR18NRCSCENTG002	(b) Agency Calculations (For your reference only)	(c) Programs/ Functions/ Activities	Total
a. Total program outlays to date	M/d/yyyy				
b. Less: cumulative program income					
c. Net program outlays (line a minus line b)		\$0.00			\$0.00
d. Estimated net cash outlays for advance period		\$0.00			
e. Total (sum of lines c & d)		\$0.00			\$0.00
f. Non-Federal share of amount on line e		\$0.00			\$0.00

f. Non-Federal share of amount on line e		\$9,449.00			\$9,449.00
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Creating and Submitting Claims



Enter the relevant dollar values in **Row G (Federal Share of Amount on Line E)** and **Row H (Federal Payments Previously Requested)**. After completing one or both of these fields, **Row I (Federal Share Now Requested)** will automatically calculate (Row G minus Row H).

g. Federal share of amount on line e	<input type="text" value="0"/>			\$0.00
h. Federal payments previously requested	<input type="text" value="\$0.00"/>	\$0.00		\$0.00
i. Federal share now requested (line g minus line h)		\$0.00		\$0.00



Creating and Submitting Claims



Cost Element	Disbursed Amount	Open Balance	Direct Requested Amount	Indirect Requested Amount	Total Requested Amount
Contractual	\$150.00	\$100.00			\$0.00
Personnel	\$0.00	\$0.00			\$0.00
Fringe Benefit	\$0.00	\$0.00			\$0.00
Domestic Travel	\$0.00	\$0.00			
Foreign Travel	\$0.00	\$0.00			
Equipment	\$0.00	\$0.00			
Supplies	\$0.00	\$0.00			
Printing	\$0.00	\$0.00			
Other	\$0.00	\$0.00			
Total Indirect Cost Requested					
Totals	\$150.00	\$500.00			

In the **Direct Requested Amount** column, input relevant values for each **Cost Element** applicable to this claim.

The amount requested for an individual cost element **can** exceed the budgeted amount allocated to that line; however, the total amount requested for the entire claim **cannot** exceed the total amount of funds for the entire agreement.



Creating and Submitting Claims



Once you have entered all of the relevant dollar amounts, click the **Next** button at the top of the screen.

Create Claim CLM-2623 Print Save Cancel Next >>

14. Requested Amounts by Cost Element

Cost Element	Disbursed Amount	Open Balance	Direct Requested Amount	Indirect Requested Amount	Total Requested Amount
Contractual	\$0.00	\$0.00	\$5.00	\$5.00	\$10.00
Personnel	\$0.00	\$0.00	\$5.00	\$5.00	\$10.00
Fringe Benefit	\$0.00	\$0.00	\$5.00	\$5.00	\$10.00



Creating and Submitting Claims



Adding a Signature

- The second stage of claim creation is the signature stage. You must select a primary certifying official for this claim. Depending on your agency or organization, a secondary certifying official may or may not be required. Click in the **Primary Certifying Official** field.
- The Certifying Official assignment is not the same as the Signatory Official user role for your organization. Certifying Official is a temporarily assigned role linked to one specific business object (such as a claim), whereas the Signatory Official role is a permanent user role. Any user can be a Certifying Official, regardless of her/his permanent role.



Creating and Submitting Claims



Then designate at least one Certifying Official in the **Primary Certifying Official** field. This can be yourself or any other user with ezFedGrants access for your organization.

Create Claim CLM-2531

✓ 1. SF-270 2. Signature 3. Attachments

Signature

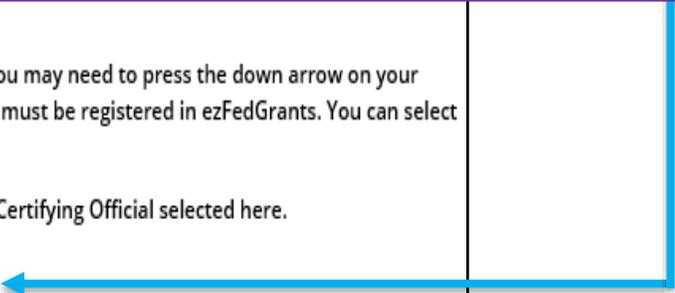
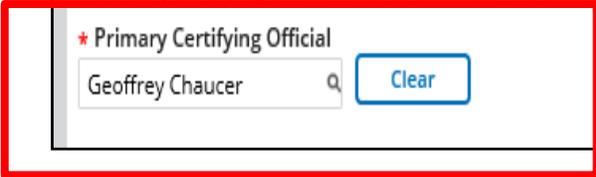
Select a Certifying Official by typing their name into the appropriate field. As you type, a list of matching names will appear below the field (you may need to press the down arrow on your keyboard to display the list). Click the appropriate Certifying Official's name when it appears on the list of matches. Please note that the user must be registered in ezFedGrants. You can select yourself as the Certifying Official.

A Primary Certifying Official must be selected. The Secondary Certifying Official is optional. Notifications and work items will be sent to each Certifying Official selected here.

* Primary Certifying Official
Geoffrey Chaucer

Secondary Certifying Official

Begin typing the username of the individual you would like to assign and the system will generate a dropdown menu of suggested usernames as you type. When you see the relevant username, click the username in the dropdown menu.





Creating and Submitting Claims



You can advance to the next stage of claim creation by clicking the “**Next >>**” button in the top right corner of the screen.

Create Claim CLM-2531

[Print](#) [Save](#) [Cancel](#) [<< Previous](#) [Next >>](#)

✓ 1. SF-270 2. Signature 3. Attachments

Signature

Select a Certifying Official by typing their name into the appropriate field. As you type, a list of matching names will appear below the field (you may need to press the down arrow on your keyboard to display the list). Click the appropriate Certifying Official's name when it appears on the list of matches. Please note that the user must be registered in ezFedGrants. You can select yourself as the Certifying Official.



Creating and Submitting Claims



Adding Attachments

- Stage three, the final stage of claim creation, is the attachments stage. Attachments are not required in order to submit a claim, but your organization or awarding agency may require attachments with your claims.

Create Claim CLM-2531 Print Save Cancel << Previous Submit

✓ 1. SF-270 ✓ 2. Signature 3. Attachments

List of Attached Files

Title	File	Operator	Date/Time	Delete?
No attachments				

[Click Here to Attach Files](#)



Creating and Submitting Claims



Create Claim CLM-2531

✓ 1. SF-270 ✓ 2. Signature 3. Attachments

List of Attached Files

Title	File	Operator
No attachments		

[Click Here to Attach Files](#)

To add an attachment, select the **Click Here to Attach Files** link under the **List of Attached Files** table. This will open the **Add Attachment** popup window.



Creating and Submitting Claims



In the **Add Attachment** popup window, click the **Browse** button to locate and select the desired attachment file on your computer. Then, click in the **Other Attachment Title** field and type a title for your attachment. Click the **OK** button to attach your file and close the **Add Attachment** popup window.

Add Attachment Close

Title:
Other

Other Attachment Title:
Budget Breakdown

Upload Document From Local Hard Disk: Browse...

OK Cancel



Creating and Submitting Claims



Once you have attached all necessary files and you are ready to submit the claim for review by the Certifying Official, click the **Submit** button.



Create Claim CLM-2531 Print Save Cancel << Previous Submit

✓ 1. SF-270 ✓ 2. Signature 3. Attachments

List of Attached Files

Title	File	Operator	Date/Time	Delete?
Budget Breakdown	C:\Users\Abael.Solomon\OneDrive+	ARS ARS-ST-GL-Admin	8/28/2019 5:14 PM	

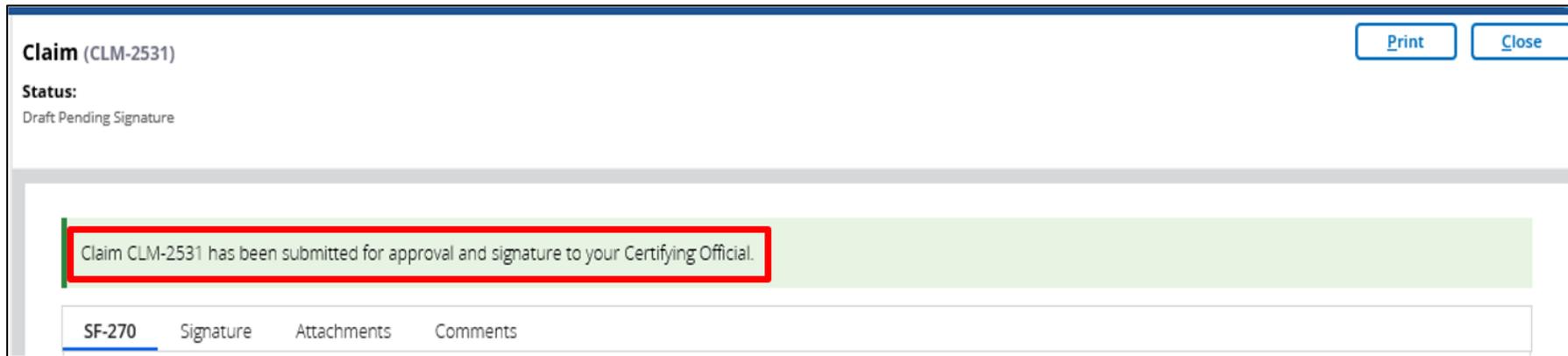
[Click Here to Attach Files](#)



Creating and Submitting Claims



If your claim has submitted successfully, the system will display a submission confirmation message. The individuals you assigned as certifying officials will then receive work items and notifications alerting them to the new claim.





Creating and Submitting Claims



Certifying Claims

- Once the claim is submitted it must be certified by the designated certifying official.
- A certifying official introduces an additional level of review prior to final submittal to the USDA partner agency.
- The following steps detail the process that certifying officials use to review and submit claims.



Creating and Submitting Claims



Begin by accessing the **ezFedGrants External Portal Home** screen. Then, locate the claim you want to review in the **Actionable Items** section and click the **Transaction ID** link to open the claim work item.

The screenshot shows the 'Home' page of the ezFedGrants External Portal. A sidebar on the left contains navigation links: Home, Opportunities, Applications, Agreements, Amendments, Claims, Reports, Repayment Requests, and Work Item. The main content area is titled 'Home' and features a 'News and Notes' section. Below this is the 'Actionable Items' section, which includes a 'Category' dropdown menu. A table displays the following data:

Transaction ID	Transaction	FAIN	Status	Due Date	Last Updated
RPY-126	Repayment Request	NR18NRCSCENTG006	Draft Pending Signature		8/22/19
CLM-2495	Claim	NR18NRCSCENTG008	Draft Pending Signature		8/14/19



Creating and Submitting Claims



On the **Claim** screen, review the SF-270 form and attachments by clicking the tabs.

Please Select An Option ▾

SF-270 Signature Attachments Comments

Claim Information:

1a. Request for Advance or Reimbursement REIMBURSEMENT	1b. Type of Payment Requested: FINAL	2. Basis of Request CASH
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Creating and Submitting Claims



After reviewing the claim, select **Sign and Submit**, **Return**, or **Cancel** from the **Decision** dropdown menu.

Sign and Submit: The claim is ready to be submitted to the agency.

Return: The claim needs to be corrected before submission to the agency.

Cancel: The claim should be discarded.

If the claim appears complete, correct, and ready to submit, click the **Sign and Submit** option on the **Please select an option** dropdown menu to proceed with digitally signing the claim and submitting it to the awarding agency. The **Return** option will return the claim to the claim creator for editing. The **Cancel** option will cancel and void the claim.

The screenshot displays a web interface for managing a claim. At the top, it shows 'Claim (CLM-2495)' and 'Status: Draft Pending Signature'. Below this is a section titled 'Please Select An Option' with a dropdown arrow. The dropdown menu is open, showing three options: 'Sign and Submit', 'Return', and 'Cancel'. The 'Sign and Submit' option is highlighted with a red box. Below the dropdown, there are tabs for 'SF-270', 'Attachments', and 'Comments'. Underneath, the 'Claim Information' section is visible, with the first item being '1a. Request for Advance or Reimbursement' and the word 'REIMBURSEMENT' below it.



Creating and Submitting Claims



Once you select the **Sign and Submit** option, you must review and agree to the legal notice/terms and conditions before submitting the claim to your agency. To review and accept the terms and conditions, click the **Legal Notice** button. This will open the **Legal Notice** popup window.

Sign and Submit

I certify that to the best of my knowledge and belief the data in this form are correct and that all outlays were made in accordance with the grant conditions or other agreement and that payment is due and has not been previously requested.

Acceptance of the terms described below upon clicking "Legal Notice" is also required.

[Legal Notice](#)

Upon your acceptance, click the "Complete Signature" button below to finish the process.

[Complete Signature](#)





Creating and Submitting Claims



Add Attachment

that we provide to you, as well as such other documents, statements, data, records and any other communication other agreements and Electronic Communications, documents, or records that you agree to using your E-Signature Grantor as reasonable and proper notice, for the purpose of any and all laws, rules, and regulations, except where

3. Paper version of Electronic Communications. You may request a paper version of an Electronic Communication

4. Revocation of electronic delivery. You have the right to withdraw your consent to receive/obtain communication your consent, contact us at www.GrantorHelpDesk@fas.usda.gov.

5. USDA Level 2 e-Authentication enrollment. Your current enrollment in USDA level 2 e-Authentication is required for Electronic Communications. It is your responsibility to use Grantor and your email service provided email account

6. Hardware, software and operating system. You are responsible for installation, maintenance, and operation of hardware associated with use of an online system. The following are the minimum hardware, software and operating system requirements:

- Processor - IBM compatible Pentium PC running Windows 2000
- Memory - 4MB RAM
- Disc Space - 50 MB's Free Space
- Monitor - 800 x 600 resolution
- Browser- Microsoft Internet Explorer 6.0 or higher
- Internet access - 28.8 modem or better

7. Controlling Agreement. If this E Signature is for an Amendment to an Agreement, then the resulting Amendment supplements and/or modifies the original Agreement and any previous amendments, as applicable by the terms and conditions of the amendment. To the extent that this Amendment contains conflicting provisions, the provisions in this Amendment will control. All other obligations of the parties remain subject to the terms and conditions of the original Agreement and any previous Amendments. To obtain electronic services and communications, indicate your consent to the terms and conditions of this Agreement by clicking on the "Complete Signature" button.

I agree with the listed Terms and Conditions

Close

loading and saving this Agreement and any other Electronic Communications provided via

Electronic Communications. If you wish to withdraw your consent, contact us at www.GrantorHelpDesk@fas.usda.gov.

Also use Grantor and email services for your account. It is your responsibility to use Grantor and your email service provided email account

responsible for computer viruses or related problems

OK Cancel

Acceptance of the legal notice is required to submit your claim to the agency. If you disagree with the legal notice, please contact an agency representative.

Once you have reviewed the legal notice, scroll to the bottom of the **Legal Notice** popup window and click the checkbox to the left of the **I agree with the listed Terms and Conditions** statement.

Click the **OK** button to submit your acceptance of the legal notice and proceed with claim submission. This will close the **Legal Notice** popup window.



Creating and Submitting Claims



Once you click the **OK** button, you will be returned to the **Claim** screen. Click the **Complete Signature** button to finalize your digital signature and submit the claim to your agency. If submission is successful, the system should display a confirmation message. Otherwise, you can confirm the successful submission by checking that the claim no longer appears on your worklist/actionable items list.

Sign and Submit

I certify that to the best of my knowledge and belief the data in this form are correct and that all outlays were made in accordance with the grant conditions or other agreement and that payment is due and has not been previously requested.

Acceptance of the terms described below upon clicking "Legal Notice" is also required.

[Legal Notice](#)

Upon your acceptance, click the "Complete Signature" button below to finish the process.

[Complete Signature](#)



Module Summary



In this module, you have learned to:

- Describe the ezFedGrants claims creation process
- Describe the ezFedGrants claims submission process
- Explain the functionality, goals and benefits of ezFedGrants





Agenda



- Course Introduction
- Module 1 – Creating and Submitting Claims
- Module 2 – Submitting Reports
- Course Summary

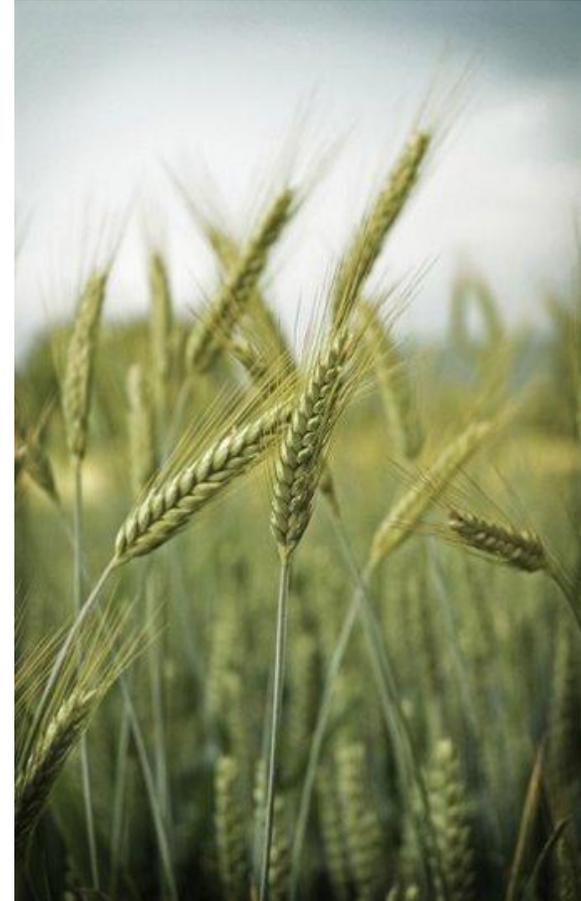


Objectives



After completing this module, you will be able to:

- Describe the process for submitting reports in ezFedGrants





Submitting Reports



What's Needed?

- The agreement must be in active status.
- No previous reports can be in the workflow. All previously created reports must be submitted or cancelled in order to fill out and submit a new report.
- The user must be provisioned with the correct roles (either Grants Processor or Grants Administrative Officer)
- Grants Processors must be included as a partner on any agreement they will be submitting reports for.



Submitting Reports



USDA ezFedGrants

Home

News and Notes

Actionable Items

Category
Report

Start by accessing the ezFedGrants homepage and navigating to the **Actionable Items** section, and selecting Report from the dropdown menu.

Transaction ID	Transaction	FAIN	Status	Due Date	Last Updated
AO172501X443G009-PE-Q2-19	Performance Report	AO172501X443G009	Not started	10/6/19	9/9/19
TA-CR-16-057-FI-SA2-18	Financial Report	TA-CR-16-057	Not started	7/15/18	9/9/19
NI18OPRREAFXG001-FI-Q3-17	Financial Report	NI18OPRREAFXG001	Draft Pending Signature	12/29/17	9/9/19
FX170200-10.G030-FI-SA2-2016	Financial Report	FX170200-10.G030	Draft	12/28/16	9/9/19
AO172501X443C008-PE-Q2-19	Performance Report	AO172501X443C008	Not started	10/6/19	9/6/19
NR17NRCSCENTC021-FI-Q2-19	Financial Report	NR17NRCSCENTC021	Draft Pending Signature	10/4/19	9/6/19
-PE-Final-17	Performance Report		Returned by Certifying Official	2/27/18	9/6/19
OA-GA-17-011-PE-SA1-17	Performance Report	OA-GA-17-011	Not started	2/27/17	9/6/19
OA-GA-17-010-PE-SA2-17	Performance Report	OA-GA-17-010	Not started	2/28/17	9/6/19
OA-GA-17-003F-PE-SA2-17	Performance Report	OA-GA-17-003F	Not started	3/1/17	9/6/19
OA-GA-17-013-PE-Annual-17	Performance Report	OA-GA-17-013	Not started	3/2/17	9/6/19



Submitting Reports



Identify the report you wish to submit and click on the link under the **Transaction ID** column.

The report type for each report is specified under the **Transaction** column.

Transaction ID	Transaction	FAIN	Status	Due Date	Last Updated
AO172501X443G009-PE-Q2-19	Performance Report	AO172501X443G009	Not started	10/6/19	9/9/19
TA-CR-16-057-FI-SA2-18	Financial Report	TA-CR-16-057	Not started	7/15/18	9/9/19
NI18OPRREAFXG001-FI-Q3-17	Financial Report	NI18OPRREAFXG001	Draft Pending Signature	12/29/17	9/9/19
FX170200-10.G030-FI-SA2-2016	Financial Report	FX170200-10.G030	Draft	12/28/16	9/9/19
AO172501X443C008-PE-Q2-19	Performance Report	AO172501X443C008	Not started	10/6/19	9/6/19
NR17NRCSCENTC021-FI-Q2-19	Financial Report	NR17NRCSCENTC021	Draft Pending Signature	10/4/19	9/6/19
-PE-Final-17	Performance Report		Returned by Certifying Official	2/27/18	9/6/19
OA-GA-17-011-PE-SA1-17	Performance Report	OA-GA-17-011	Not started	2/27/17	9/6/19
OA-GA-17-010-PE-SA2-17	Performance Report	OA-GA-17-010	Not started	2/28/17	9/6/19
OA-GA-17-003F-PE-SA2-17	Performance Report	OA-GA-17-003F	Not started	3/1/17	9/6/19
OA-GA-17-013-PE-Annual-17	Performance Report	OA-GA-17-013	Not started	3/2/17	9/6/19



Submitting Reports



USDA ezFedGrants

Create Report NR17NRCSCENTC023-FI-Q2-19

Print Save Close Next >>

Home

Opportunities

Applications >

Agreements

Amendments

Claims >

Reports

Repayment Requests >

Work Item Reassignment

Work and User Reports

Manage Permissions

Contact USDA

Training/Guidance

1. SF-425 2. Signature 3. Attachments

1. Federal Agency and Organizational Element to Which Report is Submitted
USDA NRCS

2. Federal Grant or Other Identifying Number Assigned by Federal Agency
NR17NRCSCENTC023

3. Recipient Organization (Name and complete address including zip code)

Recipient Organization Name
RUTGERS THE STATE UNIV OF NEW JERSEY 35 RESOURCE FOUNDATION SCHOOL OF AGRICULTURE

Number & Street	City	State	Zip
34 RUTGERS PLAZA	NEW BRUNSWICK	NJ	08901-8559

4a. DUNS Number
0012345

4b. EIN
Data is masked

5. Recipient Identifying Number or Account Number:

7. Basis of Accounting
 Cash
 Accrual

6. Report Type
Quarterly

Start on the first tab of the report creation process. The first tab is the standard form. This is a financial report so it is the SF-425 form. In order to navigate to other portions of the report creation process, click on the other tabs (e.g. 2, 3)



Submitting Reports



Locate **Box 10 Transactions** on the SF-425. Enter the amount of cash receipts for this reporting period in **Row A (Cash Receipts)**.

Create Report NR17NRCSCENTC023-FI-Q2-19

9/4/19

10. Cumulative Transactions

Federal Cash:
(Use items a - c for single or multiple grant reporting)
(To report multiple grants use FFR Attachments)

* a. Cash Receipts <input type="text"/>	* b. Cash Disbursements <input type="text"/>	c. Cash on Hand (a minus b) \$0.00
---	--	--



Submitting Reports



In **Box 10 Row B (Cash Disbursements)**, enter the amount of cash disbursements for the reporting period.
Row C (Cash on Hand) will automatically calculate based on your entries in **Row A** and **Row B**.

10. Cumulative Transactions		
Federal Cash:		
(Use items a - c for single or multiple grant reporting)		
(To report multiple grants use FFR Attachments)		
* a. Cash Receipts	* b. Cash Disbursements	c. Cash on Hand (a minus b)
<input type="text" value="\$100.00"/>	<input type="text" value="\$50.00"/>	\$50.00



Submitting Reports



In **Box 10 Row E (Federal Share of Expenditures)**, enter the amount of federal expenditures for the reporting period.

*** e. Expenditures (Federal Share)**

Federal Expenditures and Unobligated Balance:		
d. Total Federal Funds Authorized	* e. Expenditures (Federal Share)	* f. Unliquidated Obligation (Federal Share)
\$20,000.00	<input type="text" value="\$1,000.00"/>	<input type="text"/>
g. Total Federal share (sum of e and f)	h. Unobligated balance of Federal Funds (line d minus g)	
\$1,000.00	\$19,000.00	



Submitting Reports



In **Box 10 Row F (Federal Share of Unliquidated Obligations)**, enter the amount of unliquidated federal obligations for the reporting period.

Note: Row G (Total Federal Share) and Row H (Unobligated Balance of Federal Funds) will automatically calculate based on your entries in **Row E** and **Row F**. Complete any additional fields on the SF-425 as necessary.

Federal Expenditures and Unobligated Balance:		
d. Total Federal Funds Authorized \$20,000.00	* e. Expenditures (Federal Share) <input type="text" value=""/>	* f. Unliquidated Obligation (Federal Share) <input type="text" value=""/>
g. Total Federal share (sum of e and f) \$1,000.00	h. Unobligated balance of Federal Funds (line d minus g) \$19,000.00	



Submitting Reports



If you are completing a performance report, you will see the **SF-PPR** on the **Create Report** screen. The process for completing and submitting a performance report is almost identical. In this case, the form you will be required to complete is the SF-PPR.

USDA ezFedGrants

Create Report AO172501X443C008-PE-Q2-19

Home | **1. SF-PPR** | 2. Signature | 3. Attachments

1. Federal Agency and Organizational Element to Which Report is Submitted
USDA OPPE

2. Federal Grant or Other Identifying Number Assigned by Federal Agency
AO172501X443C008

3a. DUNS Number 0012345 **3b. EIN (Data is Masked)**

4. Recipient Organization (Name and complete address including Zip code)

Name
RUTGERS THE STATE UNIV OF NEW JERSEY 35 RESOURCE FOUNDATION SCHOOL OF AGRICULTURE

Number & Street 34 RUTGERS PLAZA **City** NEW BRUNSWICK **State** NJ



Submitting Reports



Enter performance reporting information in **Box 10 Performance Narrative**. If not already provided by the agency, please contact an agency representative for performance narrative instructions. You may also attach a performance narrative as instructed by the awarding Federal Agency, then fill out other areas as necessary.

★ 10. Performance Narrative: (Attach performance narrative as instructed by the awarding Federal Agency on the Attachments tab)



Submitting Reports



Click the **Next** button to proceed to the **Signature** stage.
As you type, options of organization users will display for selection.

Create Report AO172501X443C008-PE-Q2-19

[Print](#) [Save](#) [Close](#) [Next >>](#)

1. SF-PPR 2. Signature 3. Attachments



Submitting Reports



Click the **Next** button to proceed to the **Signature** stage. You will designate one or more Certifying Officials for your report. The Certifying Official is responsible for digitally signing the report. As you type, options of organization users will display for selection.

Create Report AO172501X443C008-PE-Q2-19

Print Save Close << Previous **Next >>**

1. SF-PPR 2. Signature 3. Attachments ← To move to the final step, click "3. Attachments" or click **Next**.

Signature

Select a Certifying Official by typing their name into the appropriate field. As you type, a list of matching names will appear below the field (you may need to press the down arrow on your keyboard to display the list). Click the appropriate Certifying Official's name when it appears on the list of matches. Please note that the user must be registered in ezFedGrants. You can select yourself as the Certifying Official.

A Primary Certifying Official must be selected. The Secondary Certifying Official is optional. Notifications and work items will be sent to each Certifying Official selected here.

* Primary Certifying Official Clear

Secondary Certifying Official Clear



Submitting Reports



Create Report AO172501X443C008-PE-Q2-19

[Print](#) [Submit](#) [Save](#) [Close](#) [<< Previous](#)

1. SF-PPR 2. Signature 3. Attachments

List of Attached Files

Title	File	Operator	Date/Time	Delete?
No attachments				
Click Here to Attach Files				

To attach a file, click the "Click Here to Attach Files" link



Submitting Reports



Add Attachment ✕

Title:
Other

Other Attachment Title:

Please enter a valid value

Upload Document From Local Hard Disk:

Click in the "Other Attachment Title" field and type an attachment title into the "Other Attachment Title" field.



Submitting Reports



Add Attachment [Close]

Title:
Other

Other Attachment Title:

Upload Document From Local Hard Disk: **Browse...**

Click the **Browse** button and select the file you want to attach from your computer.



Submitting Reports



Add Attachment [Close]

Title:
Other

Other Attachment Title:

Upload Document From Local Hard Disk:

Once the file attaches, click the **OK** button.
Repeat these steps for any additional attachments.



Submitting Reports



Once you have completed filling out all the necessary information for the report, click the **Submit** button.

Create Report AO172501X443C008-PE-Q2-19

Print Submit Save Close << Previous

1. SF-PPR 2. Signature 3. Attachments

List of Attached Files

Title	File	Operator	Date/Time	Delete?
Other	C:\Users\ \Document+	ARS ARS-ST-GL-Admin	9/12/2019 1:46 PM	

[Click Here to Attach Files](#)



Submitting Reports



After the report is submitted, a work item will be sent to the Certifying Official(s) and the status of the report will change to "Draft Pending Signature."

Performance Report (AO172501X443C008-PE-Q2-19) Print Close

Status:
Draft Pending Signature

Report AO172501X443C008-PE-Q2-19 has been submitted for approval and signature to your Organization's Certifying Official.

SF-PPR Signature Attachments



Certifying Reports



On the **ezFedGrants External Portal Home** screen, the Certifying Official will need to locate the report to review in the **Actionable Items** section. Click the **Transaction ID** link to open the report work item. 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. A sidebar on the left contains navigation links: Home, Opportunities, Applications, Agreements, Amendments, Claims, Reports, Repayments, Contact USDA, and Training/Guidance. The main content area is titled 'Home' and features several sections. The 'Actionable Items' section is highlighted with a red box and includes a 'Category' dropdown menu currently set to 'Report'. Below this is a table with the following columns: Transaction ID, Transaction, FAIN, Status, Due Date, and Last Updated. The table currently displays 'No Items'. Below the table are sections for 'My Agreements', 'Notifications', 'Applications under Review', and 'Amendments under Review', each with a plus sign to expand.



Certifying Reports



Review each section of the report and select a decision from the **Please select an option** dropdown . In order to submit the report to the agency or department, Click the **Sign and Submit** option to approve the report. To return the report to its creator for edits, select the **Return** option and enter relevant comments.

The screenshot shows a web interface for certifying reports. At the top right, there are 'Print' and 'Close' buttons. The main content area is titled 'Financial Report (NI1612-NI00MG011-FI-SA2-18)' with a status of 'Draft Pending Signature'. A dropdown menu labeled 'Please Select An Option' is open, showing two choices: 'Sign and Submit' and 'Return'. Below the dropdown is a 'Report' section with a table containing one row: 'SF-425', 'Signature', and 'Attachments'. A red box highlights the 'Sign and Submit' and 'Return' options in the dropdown menu. Another red box highlights the 'SF-425', 'Signature', and 'Attachments' row in the table. A third red box highlights the 'Please Select An Option' dropdown menu itself. The interface also shows a 'Status:' field with the value 'Draft Pending Signature'.



Certifying Reports



Financial Report (NI1612-NI00MG011-FI-SA2-18) Print Close

Status:
Draft Pending Signature

Please Select An Option

Sign and Submit

Certification: By signing this report, I certify to the best of my knowledge and intent set forth in the award documents. I am aware that this report is for the purposes of Section 1001).

Paperwork Burden Statement

According to the Paperwork Reduction Act, as amended, no persons are required to respond to a collection of information unless it displays a valid OMB Control Number. The valid OMB control number for this information collection is 0348-0061. Public reporting burden for this collection of information is estimated to average 1.5 hours per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0060), Washington, DC 20503.

Acceptance of the terms described below upon clicking "Legal Notice" is also required.

Legal Notice

Upon your acceptance, click the "Complete Signature" button below to finish the process.

After selecting to sign and submit the report, you will have to review the legal notice section. In order to do this, click the **Legal Notice** button



Certifying Reports



Legal Notice

If you have read and agreed to the Legal Notice, please check the I Agree checkbox located at the bottom of the screen.

- Electronic Signature Agreement.** By selecting the "Complete Signature" button, you are signing this Agreement electronically. You agree your electronic signature is the legal equivalent of your manual signature on this Agreement. By selecting "Complete Signature" you consent to be legally bound by this Agreement's terms and conditions. You further agree that your use of a key pad, mouse or other device to select an item, button, icon or similar act/action, or to otherwise provide (NIFA) instructions: via Grantor, or in accessing or making any transaction regarding any Grantor related transactions, including, but not limited to, application (such as the SF-424), agreement, request for payment (such as the SF-270), and amendment documents constitutes your signature (hereafter referred to as "E-Signature"), acceptance and agreement as if actually signed by you in writing. You also agree that no certification authority or other third party verification is necessary to validate your E-Signature and that the lack of such certification or third party verification will not in any way affect the enforceability of your E-Signature or any resulting contract between you and NIFA. You also represent that you are authorized to enter into this Agreement for all persons who own or are authorized to access any of your accounts and that such persons will be bound by the terms of this Agreement. You further agree that each use of your E-Signature in obtaining a NIFA service constitutes your agreement to be bound by the terms and conditions of the NIFA Disclosures and Agreements as they exist on the date of your E-Signature.
- Consent to Electronic Delivery.** You specifically agree to receive and/or obtain any and all NIFA related "Electronic Communications" (defined below) via Grantor. The term "Electronic Communications" includes, but is not limited to, any and all current and future notices and/or disclosures that various federal laws require that we provide to you, as well as such other documents, statements, data, records and any other communications regarding your relationship with NIFA. You acknowledge that, for your records, you are able to use Grantor to retain Electronic Communications: by printing and/or downloading and saving this Agreement and any other agreements and Electronic Communications, documents, or records that you agree to using your E-Signature, including, but not limited to, application documents (such as the SF-424), agreement, request for payments (such as the SF-270), and amendment documents. You accept Electronic Communications: provided via Grantor as reasonable and proper notice, for the purpose of any and all laws, rules, and regulations, except where prohibited, and agree that such electronic form fully satisfies any requirement that such communications be provided to you in writing or in a form that you may keep.
- Paper version of Electronic Communications.** You may request a paper version of an Electronic Communication. To request a paper copy of an Electronic Communication contact us at www.GrantorHelpDesk@fas.usda.gov.
- Revocation of electronic delivery.** You have the right to withdraw your consent to receive/obtain communications via Grantor at any time. You acknowledge that NIFA reserves the right to restrict or terminate your access to Grantor if you withdraw your consent to receive Electronic Communications. If you wish to withdraw your consent, contact us at www.GrantorHelpDesk@fas.usda.gov.
- USDA Level 2 e-Authentication enrollment.** Your current enrollment in USD... or and email services for Electronic Communications. It is your responsibility to use Grantor and your email
- Hardware, software and operating system.** You are responsible for installation... computer viruses or related problems associated with use of an online system. The following are the minimum
 - Processor - IBM compatible Pentium PC running Windows 2000
 - Memory - 4MB RAM
 - Disk Space - 50 MB's Free Space
 - Monitor - 800 x 600 resolution
 - Browser - Microsoft Internet Explorer 6.0 or higher
 - Internet access - 28.8 modem or better
- Controlling Agreement.** If this E Signature is for an Amendment to an Agreement, then the resulting Amendment supplements and/or modifies the original Agreement and any previous amendments, as applicable by the terms and conditions of the amendment. To the extent that this Amendment contains conflicting provisions, the provisions in this Amendment will control. All other obligations of the parties remain subject to the terms and conditions of the original Agreement and any previous Amendment.

To obtain electronic services and communications, indicate your consent to the terms and conditions of this Agreement by clicking on the "Complete Signature" button.

I agree with the listed Terms and Conditions

→

After reviewing the legal notice and if you agree with the listed terms and conditions, click in the I agree with the listed Terms and Conditions checkbox, then click the OK button.



Certifying Reports



[Please Select An Option](#)

Sign and Submit

Certification: By signing this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and intent set forth in the award documents. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001).

Paperwork Burden Statement

According to the Paperwork Reduction Act, as amended, no persons are required to respond to a collection of information unless it displays a valid OMB Control Number. The valid OMB control number for this information collection is 0348-0061. Public reporting burden for this collection of information is estimated to average 1.5 hours per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0060), Washington, DC 20503.

Acceptance of the terms described below upon clicking "Legal Notice" is also required.

[Legal Notice](#)

Upon your acceptance, click the "Complete Signature" button below to finish the process.

[Complete Signature](#)

← Click the **Complete Signature or Submit** button.



Certifying Reports



Financial Report (NI1612-NI00MG011-FI-SA2-18)

Status:

Submitted

After successfully signing and submitting the report, you will be taken to a confirmation page and the status of the report will change to "Submitted."

Report NI1612-NI00MG011-FI-SA2-18 has been signed and submitted.

SF-425

Signature

Attachments



Module Summary



In this module, you have learned to:

- Describe the process for submitting reports in ezFedGrants





Agenda



- Course Introduction
- Module 1 – Creating and Submitting Claims
- Module 2 – Submitting Reports
- Course Summary



Additional Training and Resources



- Job Aids located at: <https://www.nfc.usda.gov/ezfedgrants>
- Your Agency Representative
- Monthly FAQ Session
- ezFedGrants Help Desk: ezFedGrants@cfo.usda.gov
- For eAuthentication issues including password resets, contact the eAuthentication helpdesk at eAuthHelpDesk@ftc.usda.gov or dial 1-800-457-3642 (Option 1).





Questions?

