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.
Menu Path

Use the following menu path to begin this procedure:


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.
Initiating the Access Request Process


   **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.

![ezFedGrants External Portal Home Screen](image)

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.

![Request Access Tile](image)
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.
     o 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).
     o 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.
     o 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.
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.

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**.
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.

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

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.
  o Please provide the relevant DUNS and CAGE numbers for your organization with your communication.
5. 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**.
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).

2. Click in the Supervisory Point of Contact (POC) field and type your point of contact’s first and last name.
3. Click in the **POC Email** field and type your point of contact’s email address.

![POC Email Image]

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

![POC Phone Image]

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.

![Work Contact Information Image]
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.

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

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

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

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

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

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.

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.
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

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<td>Initial Document Created</td>
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<td>3/14/2017</td>
<td>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 &amp; image descriptions; corrected referenced job aid titles; updated document title; updated header and footer; updated document advanced properties.</td>
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<tr>
<td>April Murphy</td>
<td>4/28/2017</td>
<td>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 $Note$; House Number field.</td>
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<td>April Murphy</td>
<td>9/13/2017</td>
<td>Comments: Updated document title</td>
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