



## ezFedGrants User Roles

GM 305



- Course Introduction
- Module 1 – ezFedGrants Summary
- Module 2 – ezFedGrants User Roles
- Course Summary



# Introduction



- Name
- Role
- Training Purpose





# Course Objectives



After completing this course, you will be able to:

- Summarize the user roles available in ezFedGrants



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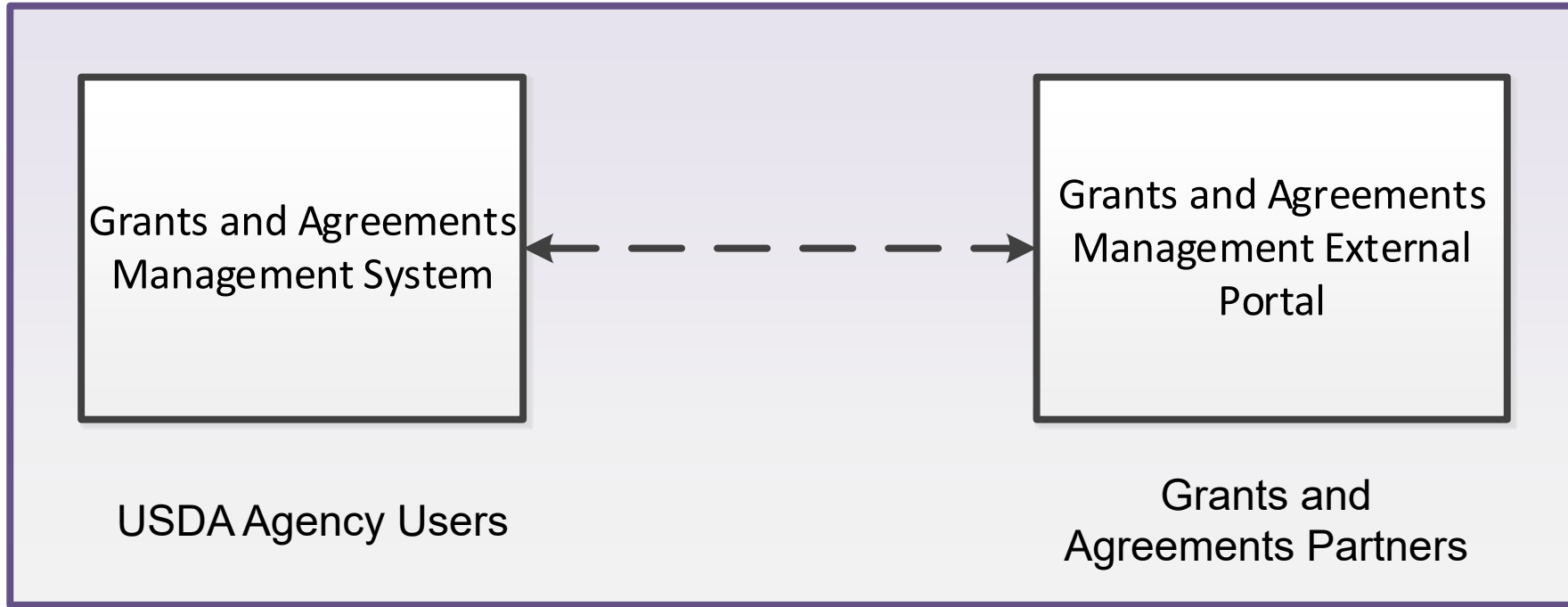
After completing this module, you will be able to:

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





# What is ezFedGrants?



## 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 agreement processing through electronic form submittal and approval
- Acts as a platform where USDA Agency users and Agreement Partners can communicate
- Allows for easy access to the ezFedGrants Helpdesk
- Decreases manual entry, reducing errors



- **Application creation and submittal:** Filling out SF-424 and 424A forms, reviewing applications, etc.
- **Approval workflows and notifications:** Receive notifications of necessary steps and approvals, with next steps automatically assigned
- **Claims processing:** Create, review, approve, and submit claim requests.
- **Reporting:** Process performance and financial reports in a timely fashion through automated notifications.

## ezFedGrants is a role-based system

Role alignment is the process of defining roles required to perform grants management business processes and mapping users to those roles

This results in the following benefits:

1. Identifies the ezFedGrants tasks, activities, and roles needed to perform business processes and **recommends alignment** to team members
2. Allows for proper **segregation of duties** and financial controls among users
3. Gives Security Administrators the ability to assign appropriate activities efficiently to designated users **avoiding degradation in service** or performance
4. Assigns ezFedGrants users the **access to perform specific tasks** within defined user roles to execute ezFedGrants business functions

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After completing this module, you will be able to:

- Explain the different roles available in ezFedGrants
- Describe the functionality available to the different ezFedGrants user roles



- There are three primary roles available to ezFedGrants external portal users (grant award applicants and recipients).
  - Grants Administrative Officer (GAO)
  - Grants Processor (GP)
  - Signatory Official (SO)
  
- All users must have one primary role, and each user cannot have more than one primary role.
  
- Each organization may have multiple users with the same primary role (e.g. three GAOs, two SOs, six GPs).
  
- Each user may only have one role assigned for themselves within the ezFedGrants system at a time.
  
- The system now allows users to be assigned more than one organization listed on their profile.

## ezFedGrants Primary Roles

- **Grants Administrative Officer (GAO)**
  - Essentially the account administrator for your organization.
- **Grants Processor (GP)**
  - Helps to create Claims and Reports.
- **Signatory Official (SO)**
  - Helps to review and digitally sign Applications in ezFedGrants.

## ezFedGrants Secondary Roles

- **Certifying Official (CO)**

- A **temporary** role assigned on the spot and attached to a single business object within ezFedGrants.
- Helps to review and approve Claims and Reports before submittal to USDA agency.
- Anyone can be a certifying official as long as they have a user role within ezFedGrants for your organization.
- Introduces an additional level of review before final submission of documents to USDA agency.



## Grants Administrative Officer



- The first user for your organization **MUST** request access as a GAO.
- Users requesting the Grants Administrative Officer (GAO) role who are also the first users from their organizations to request access to the ezFedGrants Portal, will have their access requests approved by their USDA Agency Grants Management Officer (AGMO).
- All subsequent user access requests, including additional GAOs, are approved by the individual assigned as GAO for that organization.
- Before you can request access as a Grants Processor or Signatory Official, another individual from your organization must have been provisioned by your USDA agency with the Grants Administrative Officer role.

## Grant Administrative Officer (GAO):

- Approve access requests, change user roles, and deactivate user access.
- Refer to the External Portal User Role Management and External Portal Access Request Review job aids for more information.
- View applications, opportunities, award documents, claims, and reports.
- Create claims and applications.
- Prepare and submit reports for agreements.
- Reassign reports (change who is responsible for completing the report).
- Be designated as a Certifying Official (secondary role).



# Grants Processor



## Grants Processor



- This role is similar to the GAO role, with the primary difference being that the Grants Processor (GP) cannot review access requests, manage user roles/access, or reassign reports.

## Grant Processor (GP):

- Prepare and submit reports for agreements on which they are listed as the appropriate Partner type (varies by agency).
- Create applications and claims.
- Be designated as a Certifying Official.



## Signatory Official

- This role has a limited scope compared to the other roles, but each organization must have at least one Signatory Official (SO) in order to fully use the ezFedGrants External Portal. If your organization does not have an SO, you will not be able to submit applications or sign agreement documents in ezFedGrants.

## Signatory Official (SO):

- Approves application and agreement documents.
- Can be designated a Certifying Official.
- This role can be filled by the current Grantee Signatory Official.



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- Today we learned about:
  - The different user roles available in ezFedGrants
  - Which roles can perform which activities in ezFedGrants

- Monthly FAQ Session
- Your Agency Representative
- ezFedGrants Help Desk: [ezFedGrants-cfo@usda.gov](mailto:ezFedGrants-cfo@usda.gov)
- For eAuthentication issues including password resets, contact the eAuthentication helpdesk at <https://www.eauth.usda.gov/eauth/b/usda/helpdesk>.





Questions?

