ezFedGrants
Overview and Basic Navigation

GM 306

Module 1
Course Introduction

Agenda

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

Course Overview

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

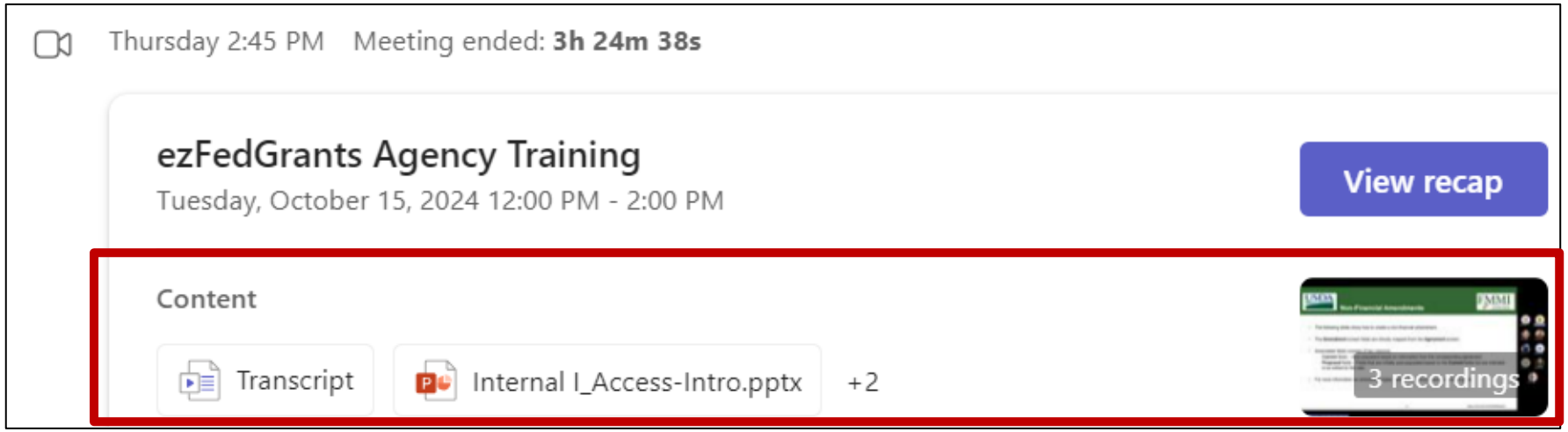
Introduction
Instructor and Students

In the chat, please share your:

- Location
- Organization
- Role
- Expectations

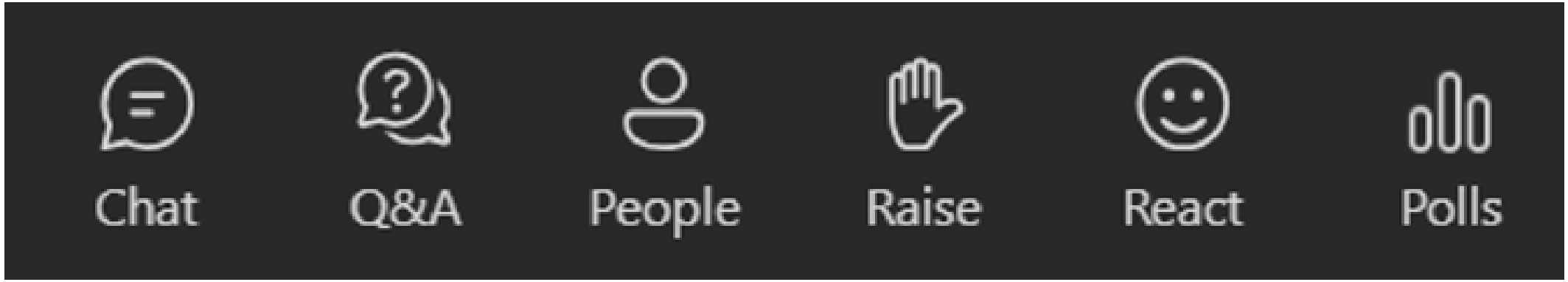
Session Recorded

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



Participation

- Participation is encouraged!
- Feel free to ask questions in the **Chat** or in the **Q&A** section of Teams.
- **Raise** your hand or **React** in Teams.



How to Get Answers to Your Questions

Login.gov

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

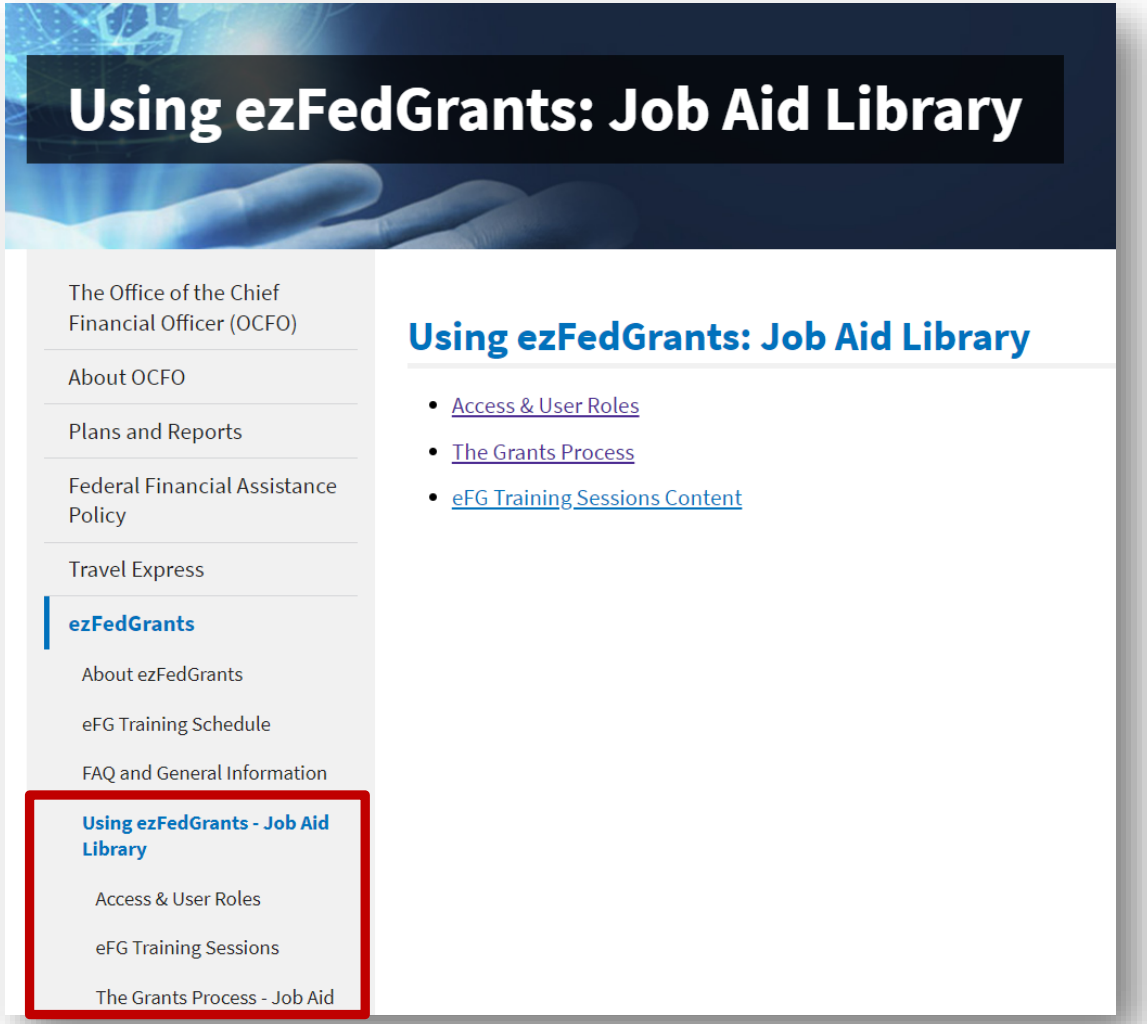
ezFedGrants

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

Bookmark or favorite these links!

Job Aid Library

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



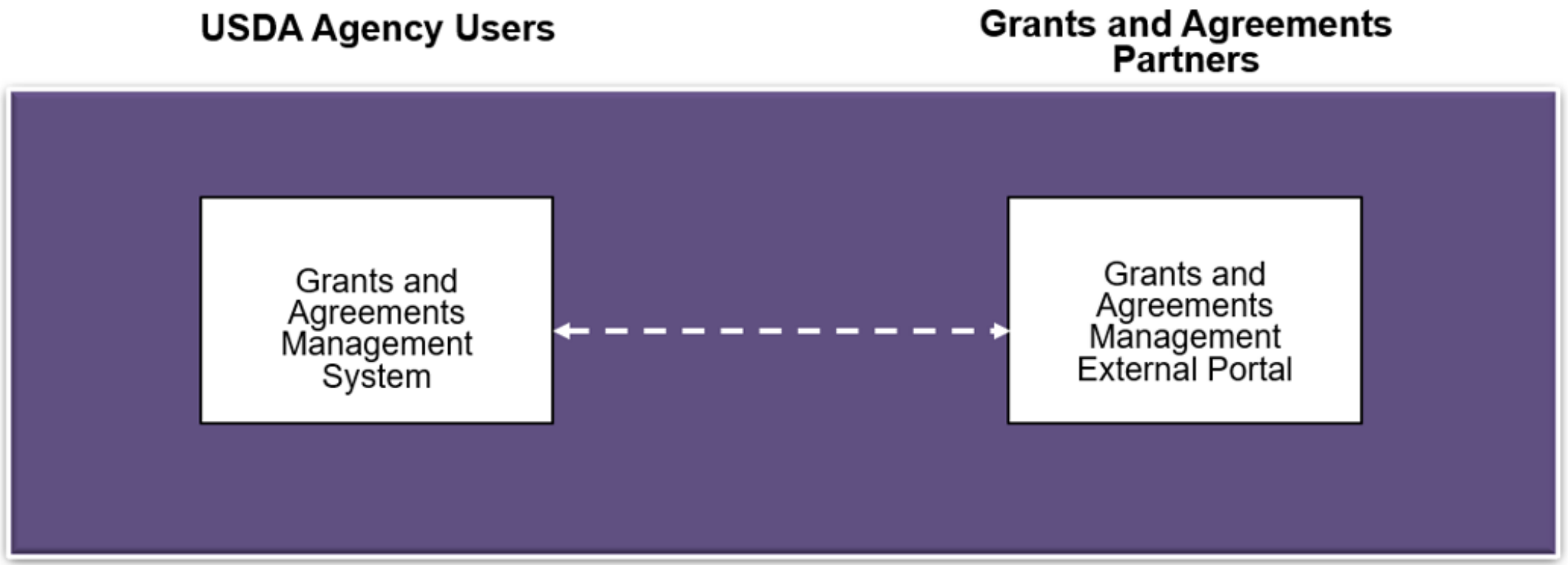
Module 2
ezFedGrants Overview

Module 2 – ezFedGrants Overview Objectives

After completing this module, you should be able to:

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

What is ezFedGrants?



Benefits of Using ezFedGrants

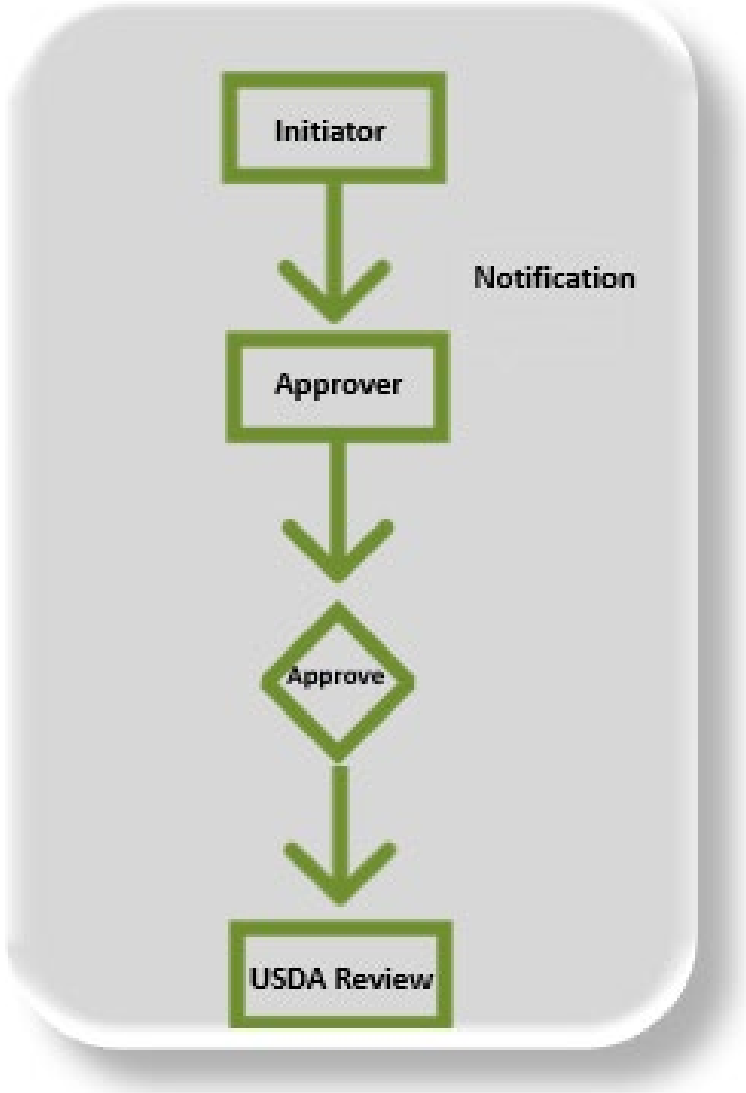
- Accurate data tracking of agreements, amendments, and claims
- Reduces the time required for grant-related operations associated with approvals and claims
- Allows for the standardization of grant execution and management
- Speeds up agreement processing through electronic form submittal and approval
- 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

Grants Management Lifecycle

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

Approval Workflows and Notifications

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

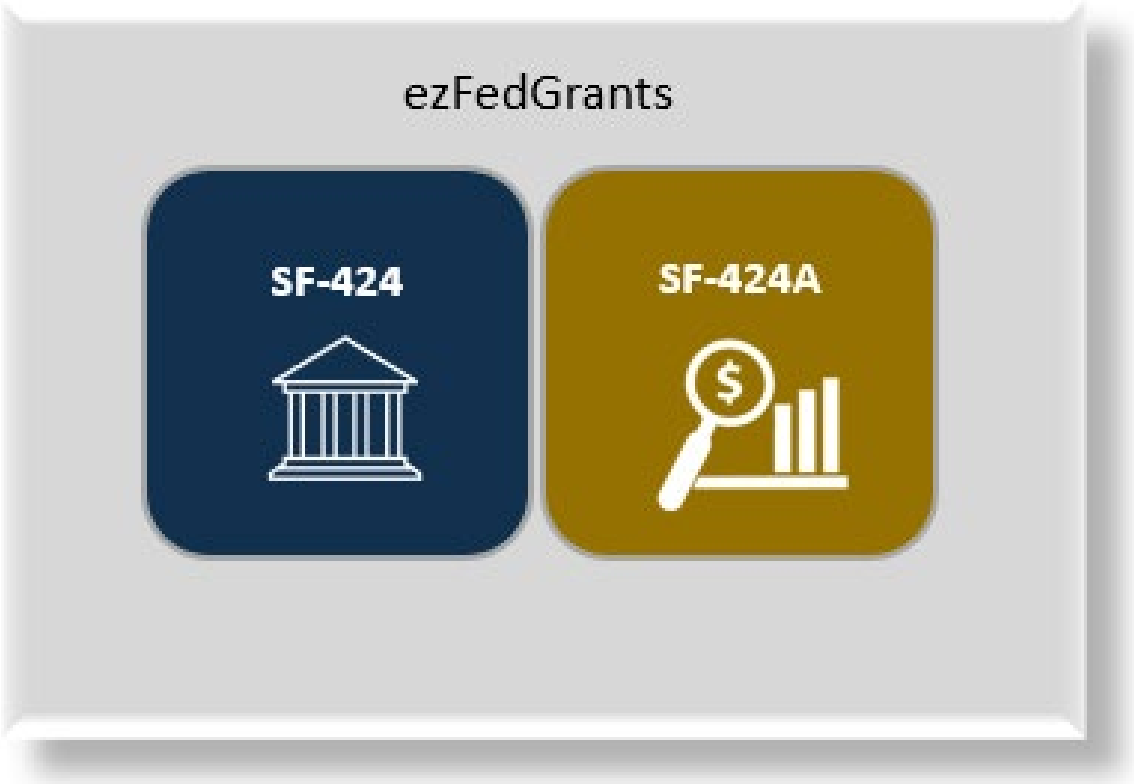


Opportunities

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

Applications

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



Claims Processing

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

Progress Reports

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

Summary:
Module 2 – ezFedGrants Overview

Transforming Financials
at the People's Department

You should now be able to:

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

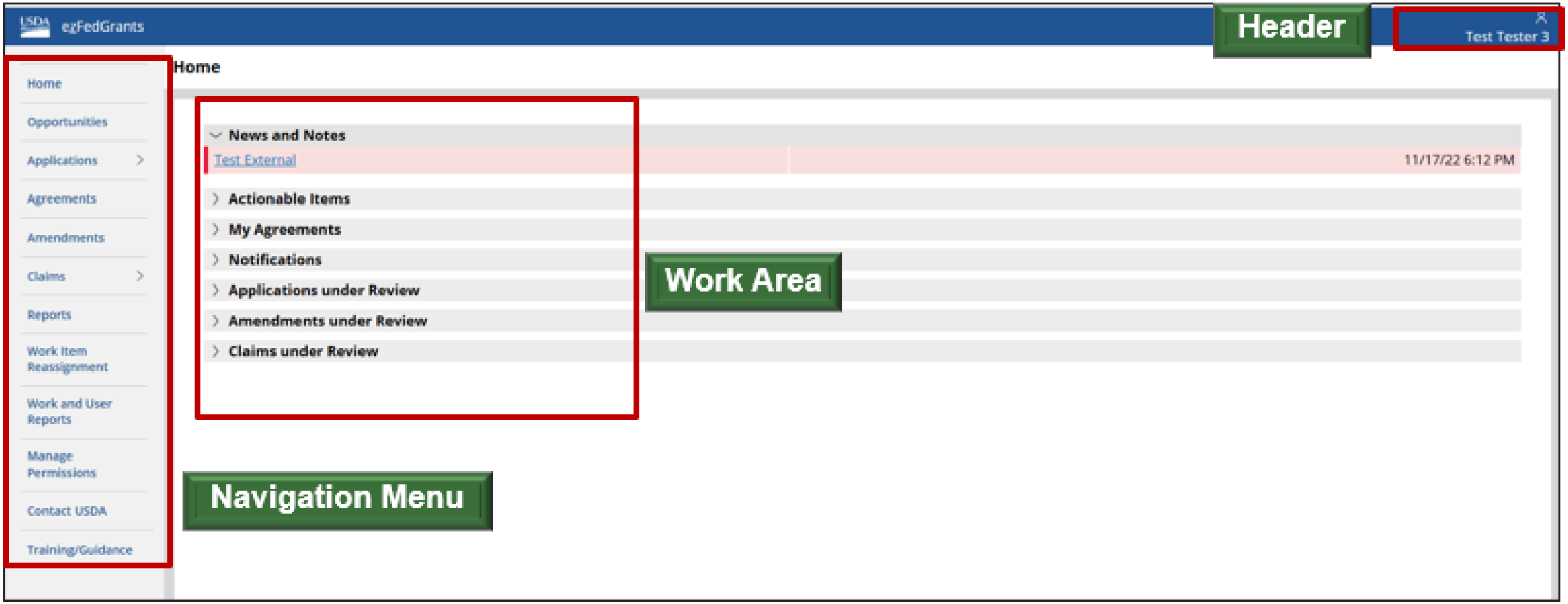
Module 3
ezFedGrants External Portal

Module 3 – ezFedGrants External Portal Objectives

After completing this module, you should be able to:

- Explain how to navigate within the eFG External Portal.

ezFedGrants External Portal Home Page Dashboard



ezFedGrants External Portal Home Page Descriptions

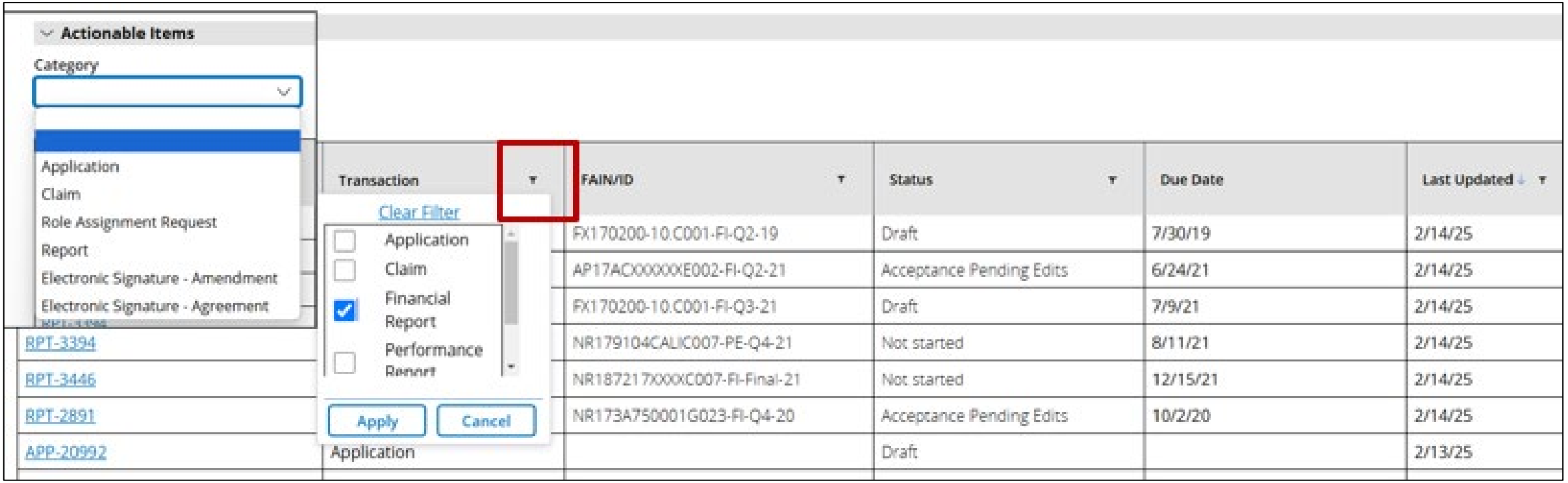
Section	Description
Header	Includes user's name and a link to profile details
Navigation Menu	Navigate to Home, and view or search for Opportunities, Applications, Agreements, Amendments, Claims, and Reports Quick links: Contact USDA (ezFedGrants Help Desk) and Training/Guidance to ezFedGrants website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

ezFedGrants External Portal Work Area Descriptions

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

ezFedGrants Home Page - Work Area Actionable Items

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

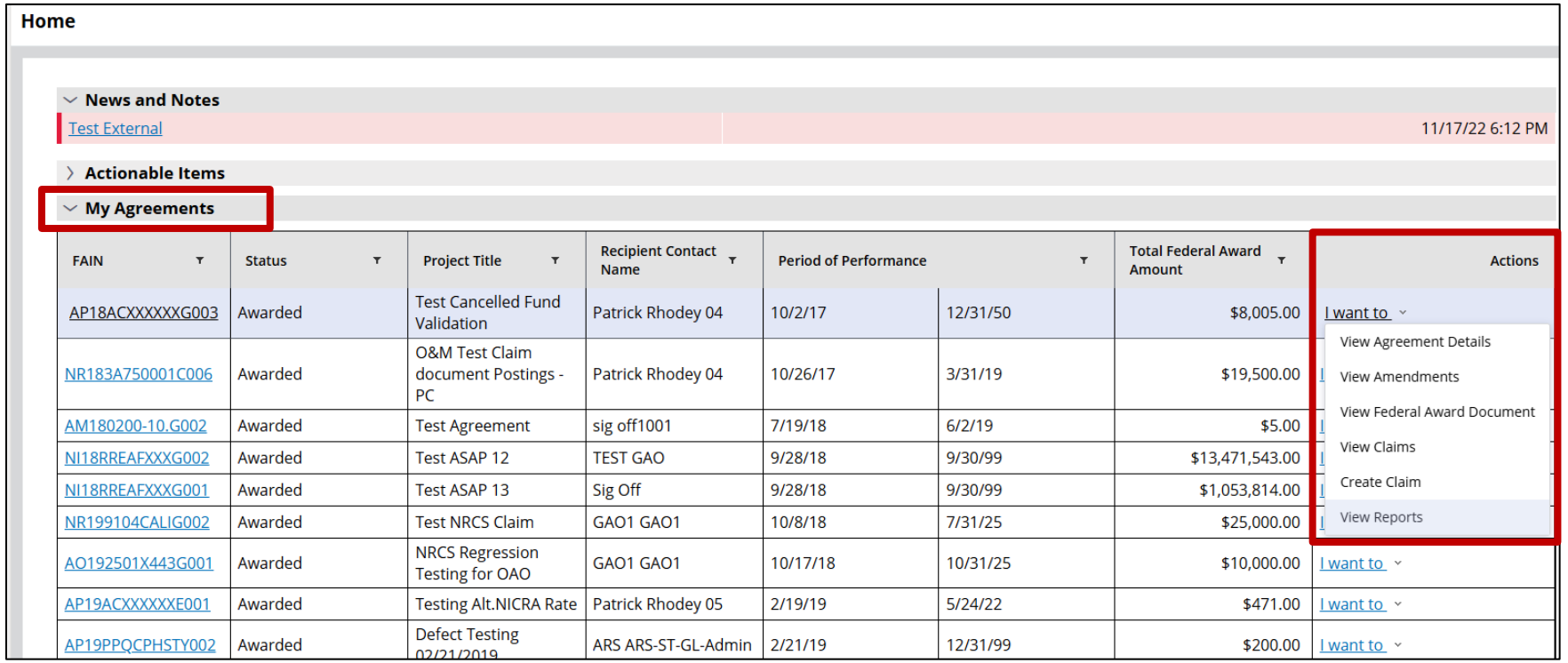


ezFedGrants Home Page - Work Area
My Agreements

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

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

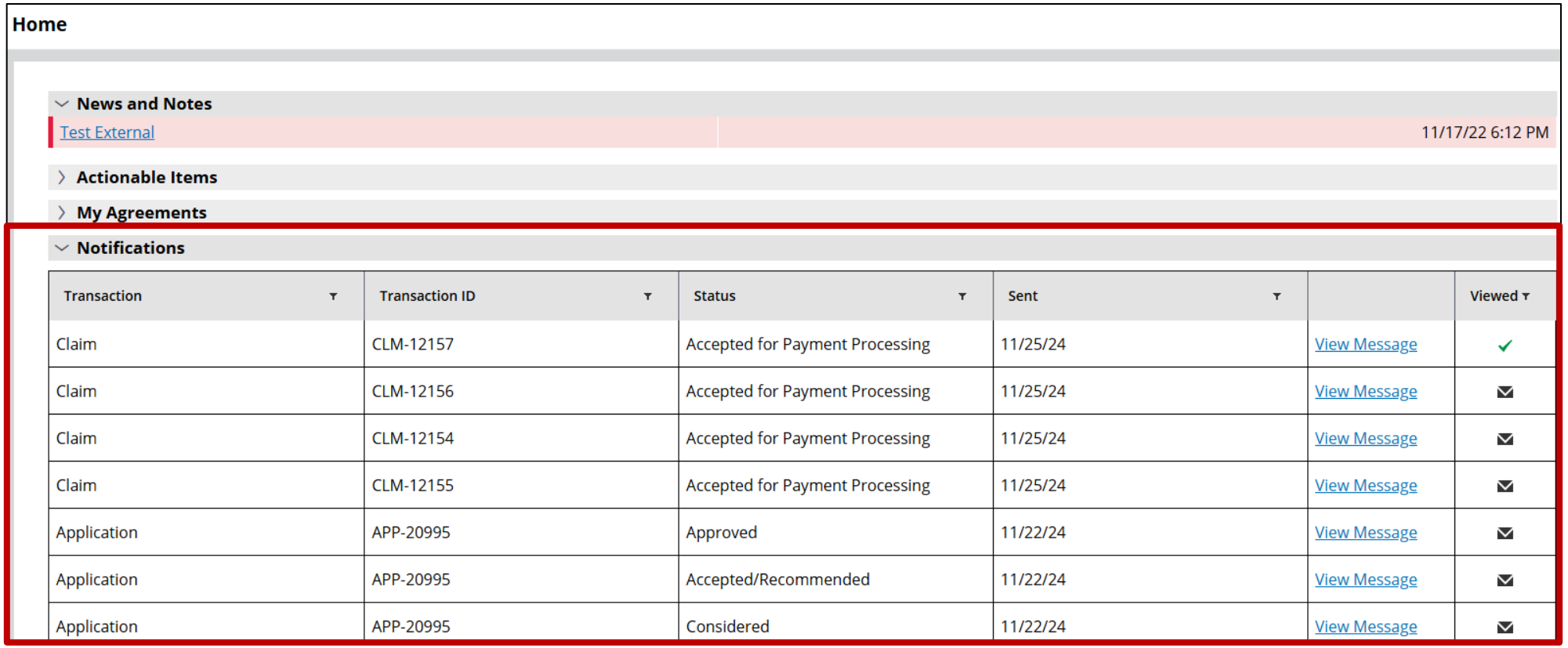
- View Agreement Details
- View Amendments
- View Award Document
- View Claims
- Create Claim
- View Reports



FAIN	Status	Project Title	Recipient Contact Name	Period of Performance		Total Federal Award Amount	Actions
AP18ACXXXXXG003	Awarded	Test Cancelled Fund Validation	Patrick Rhodey 04	10/2/17	12/31/50	$8,005.00	I want to
NR183A750001C006	Awarded	O&M Test Claim document Postings - PC	Patrick Rhodey 04	10/26/17	3/31/19	$19,500.00	
AM180200-10.G002	Awarded	Test Agreement	sig off1001	7/19/18	6/2/19	$5.00	
NI18RREAFXXXG002	Awarded	Test ASAP 12	TEST GAO	9/28/18	9/30/99	$13,471,543.00	
NI18RREAFXXXG001	Awarded	Test ASAP 13	Sig Off	9/28/18	9/30/99	$1,053,814.00	
NR199104CALIG002	Awarded	Test NRCS Claim	GAO1 GAO1	10/8/18	7/31/25	$25,000.00	
AO192501X443G001	Awarded	NRCS Regression Testing for OAO	GAO1 GAO1	10/17/18	10/31/25	$10,000.00	I want to
AP19ACXXXXXE001	Awarded	Testing Alt.NICRA Rate	Patrick Rhodey 05	2/19/19	5/24/22	$471.00	I want to
AP19PPQCPHSTY002	Awarded	Defect Testing 02/21/2019	ARS ARS-ST-GL-Admin	2/21/19	12/31/99	$200.00	I want to

ezFedGrants Home Page - Work Area Notifications

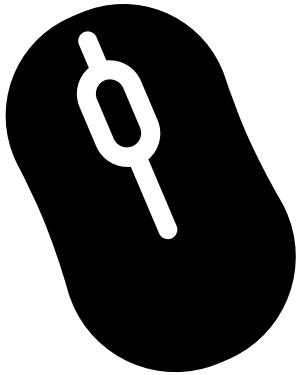
View Message related to listed notification.



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

Navigation Buttons

- **Red asterisk** – Required fields
- **Auto-populated fields** – Grayed out
- **Print** – Prints PDF version of document
- **Refresh** – Updates data displayed
- **Save** – Saves data on screen
- **Cancel** – Cancels action and returns to previous screen
- **Next** – Moves to next screen
- **Back** – Moves to previous screen



Editing Fields

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

Gray Fields

Not Editable
Automatically Entered or
Not Determined Yet

White Fields

Entries Can be Made

System Required Fields

Red Asterisk by Field

Search Criteria Example (Agreements) External Portal

Performance Start Date

Organization Name
Project Title
Organization
City
State
Postal Code
Country)

Primary POC Name
First Name
Last Name
Email Address

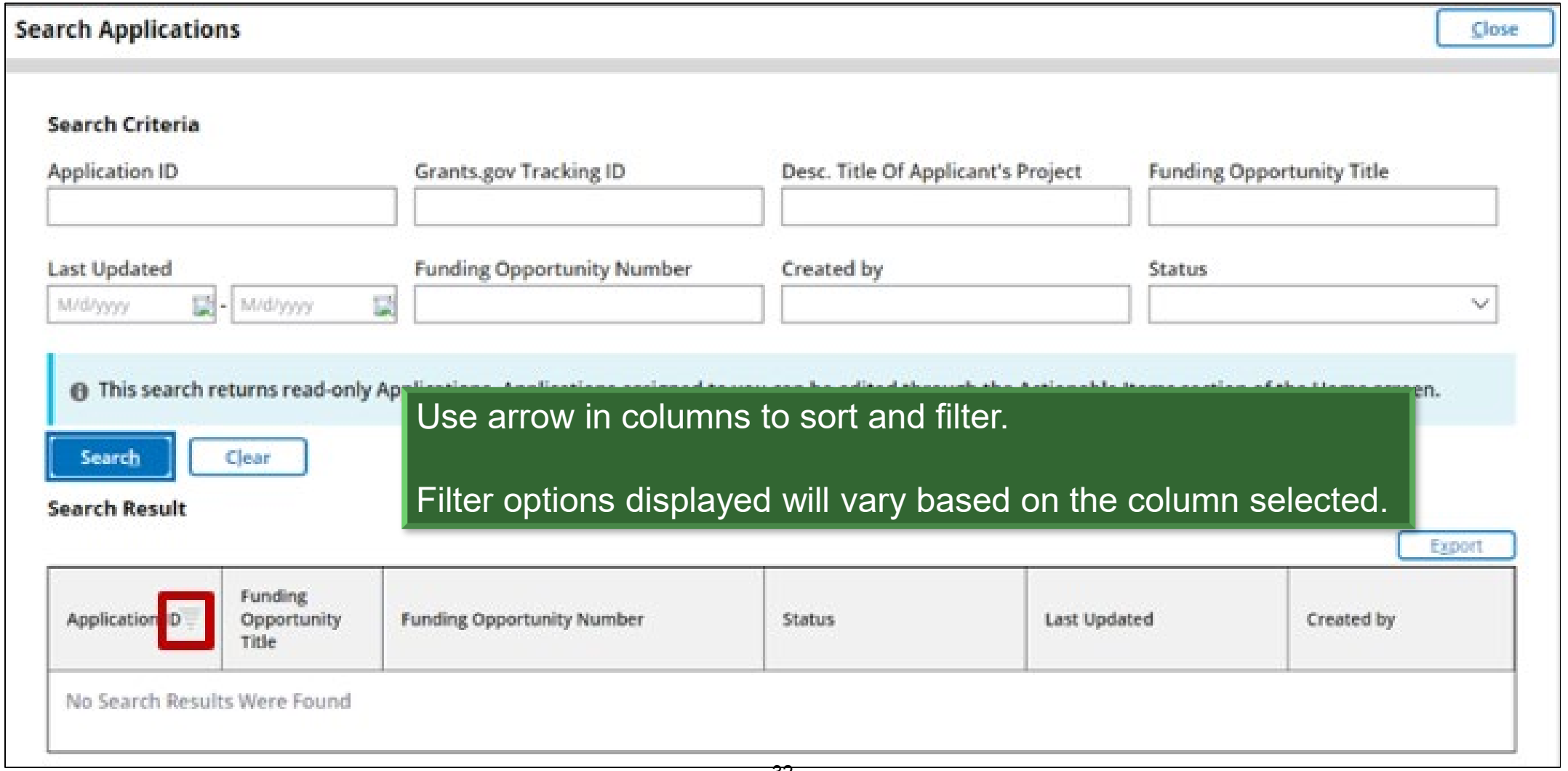
Agreement Title
Organization name associated with Agreement)

Performance End Date

Status
Executed
Awaiting Grantee Acceptance
Pending Budget Execution
Pending Closeout
Suspended
Closed

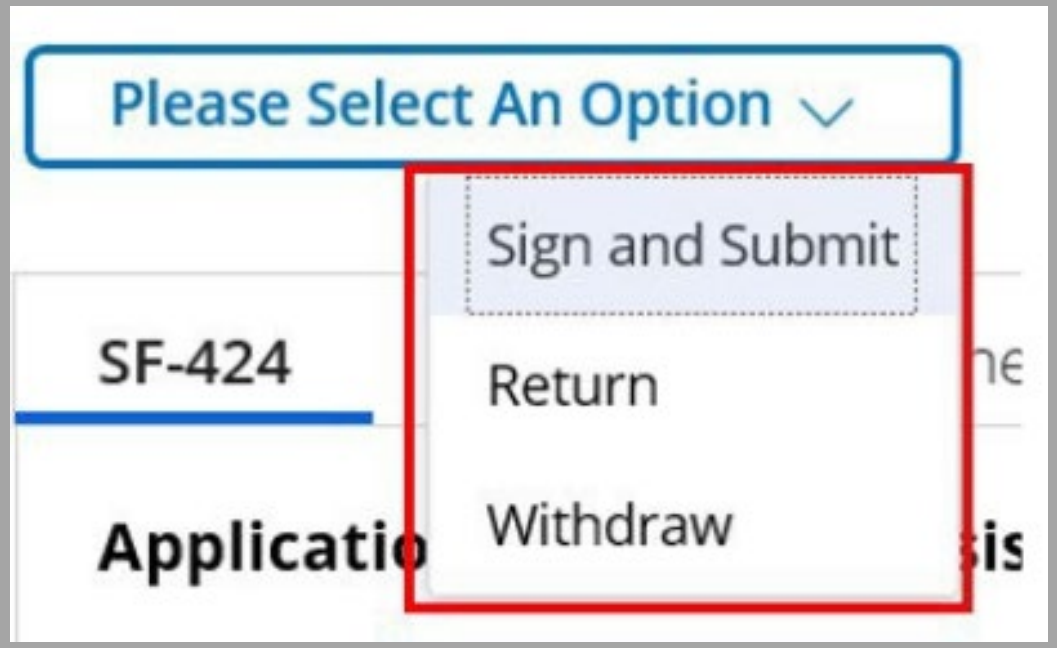
Search Criteria options vary based on the search screen.

Search Results Example (Applications)



Digital Signature Decision Dropdown

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



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Module 3 – ezFedGrants External Portal

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