ezFedGrants
Frequently Asked Questions (FAQ)
Recipients

Module 1
Course Introduction

Agenda

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- Module 3 – System Navigation

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Claims

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Withdraw (Cancel) Claim

Repayments

Difference Between Claim & Repayment Request?

Please enter in chat:

- What organization are you representing?

- What is your role?

- What is your goal for joining today's FAQ training session?
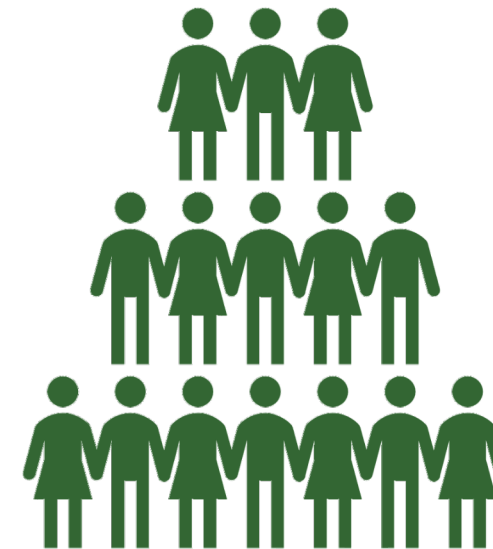
- The purpose of this session is to provide an opportunity to address frequently asked questions from ezFedGrants external recipient users.

- It is also an opportunity to review recurring topics or issues related to ezFedGrants.

- 80% of issues that don't require technical support are typically resolved in one business day or less.

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.
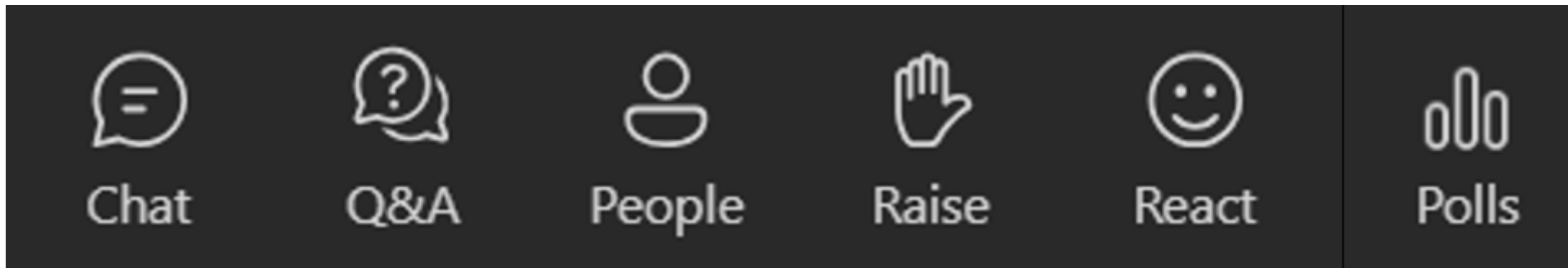
Chat Q&A People Raise React Polls

- ezFedGrants functionality, processes and workflows are agency-specific.

- For questions related to awards, agreements, and policy contact your Agency Point of Contact (POC).

- Agency representative is listed within the opportunity or agreement.
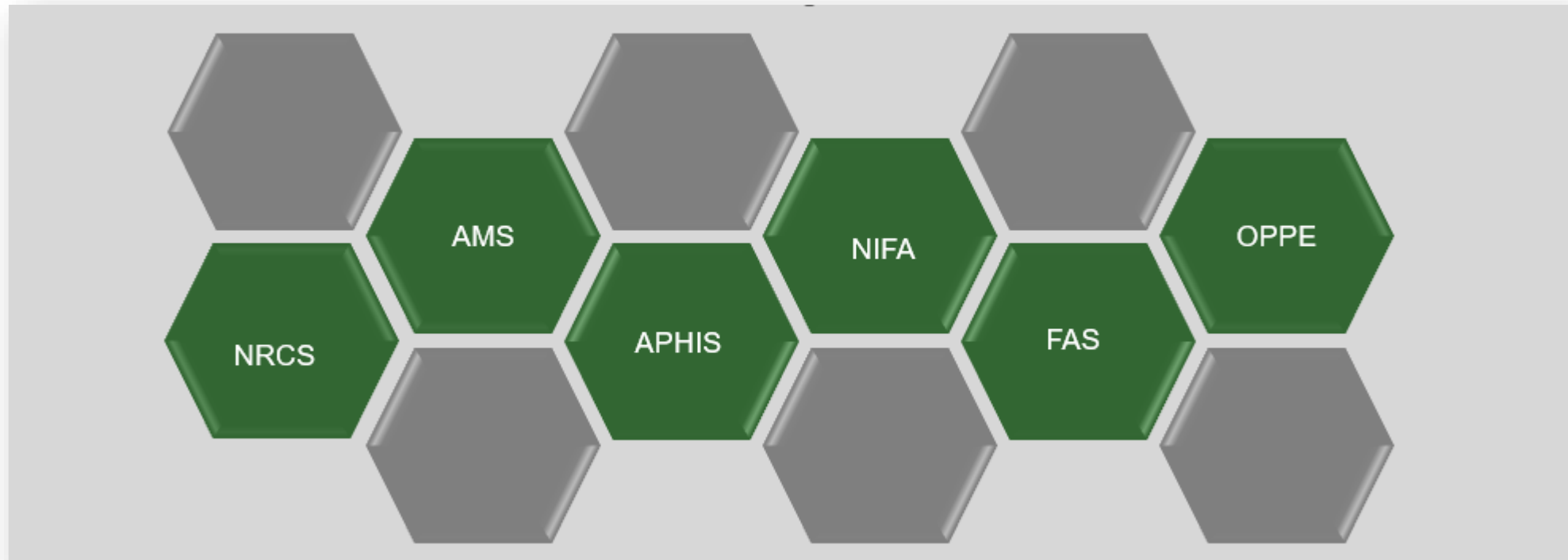
eAuth

- eAuthentication or login.gov password/account issues
- Contact the eAuth helpdesk at www.eauth.usda.gov/helpdesk

Login.gov

- Call (844) 875-6446
- Operating hours 24 hours a day, 7 days a week
- Refer to Login.gov FAQs
- Review the Recipient training schedule

ezFedGrants

- Contact ezFedGrants help desk: ezFedGrants-cfo@usda.gov
- Training schedule eFG Training Schedule | USDA
- Recipient job aids: Job Aid Library

Bookmark or favorite these links!

Polls

If your computer is not set up to answer polls, please answer in the chat.

- Have you successfully logged in to the eFG system before?

- Have you reached out to the eFG Help Desk team before?

Module 2
Access and Roles

USDA

FMMI
Transforming Financials
at the People's Department

By the end of this module, you should be able to:

- Describe the difference between Grants.gov and ezFedGrants

- Explain how to register for ezFedGrants

- List the steps for obtaining a Login.gov account

- Describe recipient roles within an organization

FREQUENTLY ASKED QUESTIONS

Question:

- What is the difference between ezFedGrants and Grants.gov?

- Why are there two systems?

Answer:

- Grants.gov is central point for all grant information across entire federal government.

- ezFedGrants is USDA specific.

- Grants.gov only covers a portion of the grants life cycle (mainly the pre-award stages).

- ezFedGrants covers the entire grants life cycle.

- USDA agencies may still request that you submit applications through Grants.gov.

- Grants.gov applications can be pulled into ezFedGrants.

Grants.gov

Central location for federal grants

Covers portion of Grant process, mainly pre-award stages

EzFedGrants

USDA specific

Covers entire grant lifecycle

Question:

How do I obtain a login.gov account?

Answer:

If you already have an eAuth account, you still need a Login.gov account. Follow these steps to obtain a Login.gov account:

1. *Click **Launch ezFedGrants** link.*

2. *Select **Customer** on eAuth login for ezFedGrants.*

3. ***Customer Login** displays. Click **Login.gov**. **Note:** If an existing Login.gov account, follow sign-in and prompts..*

4. *Click **Create an account**.*

5. *Follow instructions to do the following: 1. Set up account 2. Link to USDA eAuth 3. Verify identity.*

6. *Questions about account creation, linking to eAuth or identity verification visit the USDA eAuth FAQs.*

7. *Once your login.gov account is obtained, refer to Role Assignment Job Aid for guidance on requesting an ezFedGrants role.*

Launch ezFedGrants

Login.Gov

Create Account

Follow Prompts

Question:

If you have a Login.gov account that you have used for other purposes (say employment), do you need to create a new login.gov account with a new email address?

Answer:

No, you should be able to use your existing login.gov account.

Accounts are based on your email address.
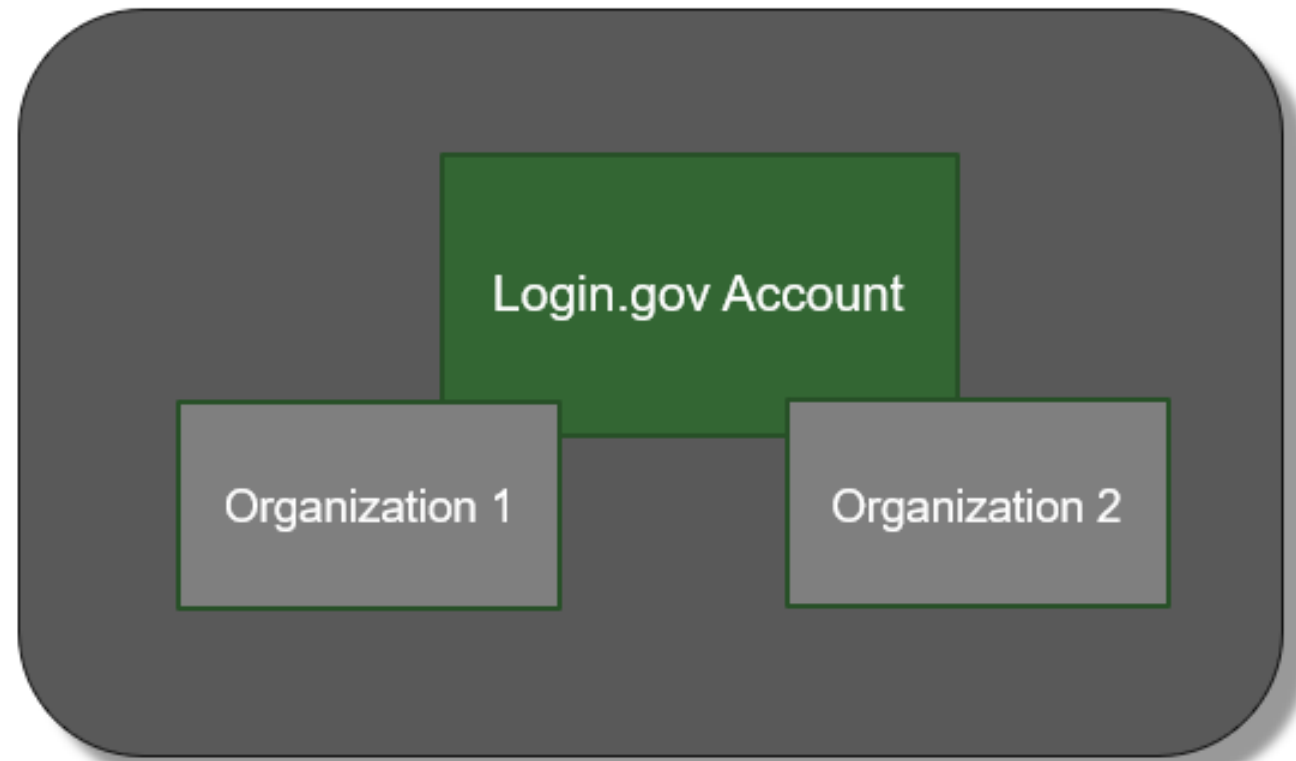
Register for ezFedGrants

Question:

How do I register for ezFedGrants?

Answer:

1. Obtain a Login.gov account.

2. Navigate to the ezFedGrants website.

3. Click **Create Role Assignment Request**.

4. The role request is sent to your organization's Grants Administrative Officer (GAO) for approval.
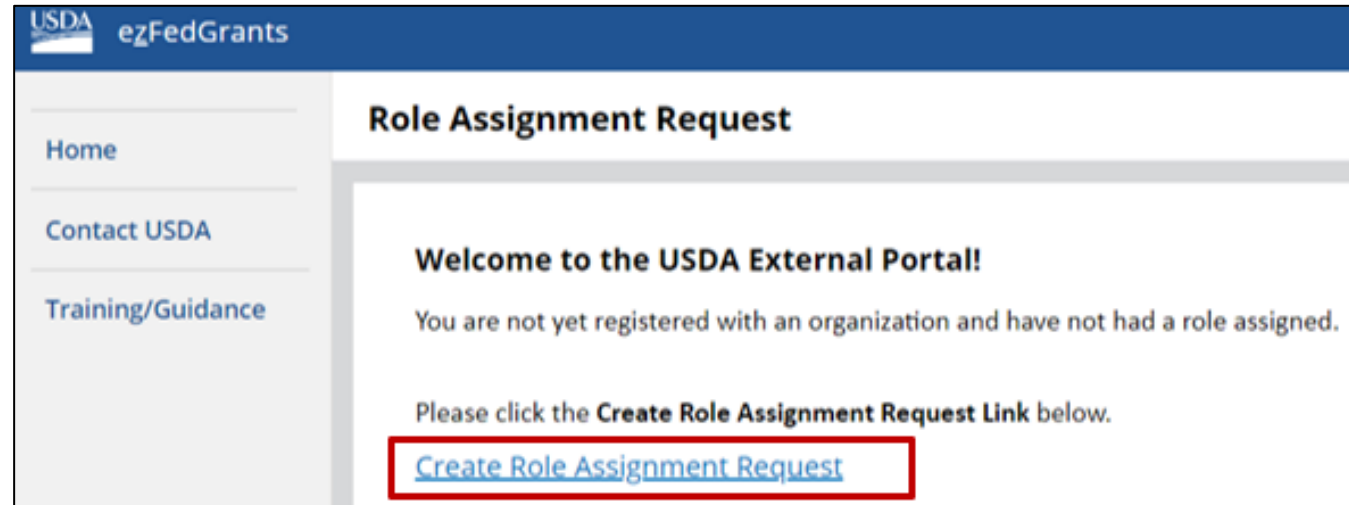
Note: If you are the first user for your organization, choose the GAO role and agency to send role request to agency AGMO.

Question:

Where can we find a list of all the available user roles and what each can do?

Answer:

- ezFedGrants External Portal User Roles

- Each person can only have one primary user role.

Grants Administrative Officer (GAO)

Grants Processor (GP)

Signatory Official (SO)

Who is our Grants Administrative Officer (GAO)?

- After submitting a role assignment request, note your organization's GAOs listed as request approver.

- Otherwise, request this information internally within your organization.

- If you are still unsure, reach out to the eFG Help Desk for support.

On Role Request → Request Internally → eFG Help Desk

Role Assignment

Question:

How can I replace someone that is on our account with the new individual?

Answer:

A GAO approves the new individual. The GAO can also remove a user from your organization.

Use the following steps to request a role.

1. Access **ezFedGrants External Portal Home** screen.
2. Click **Create Role Assignment Request** link. Refer to Role Assignment Job Aid for guidance on requesting an ezFedGrants role.
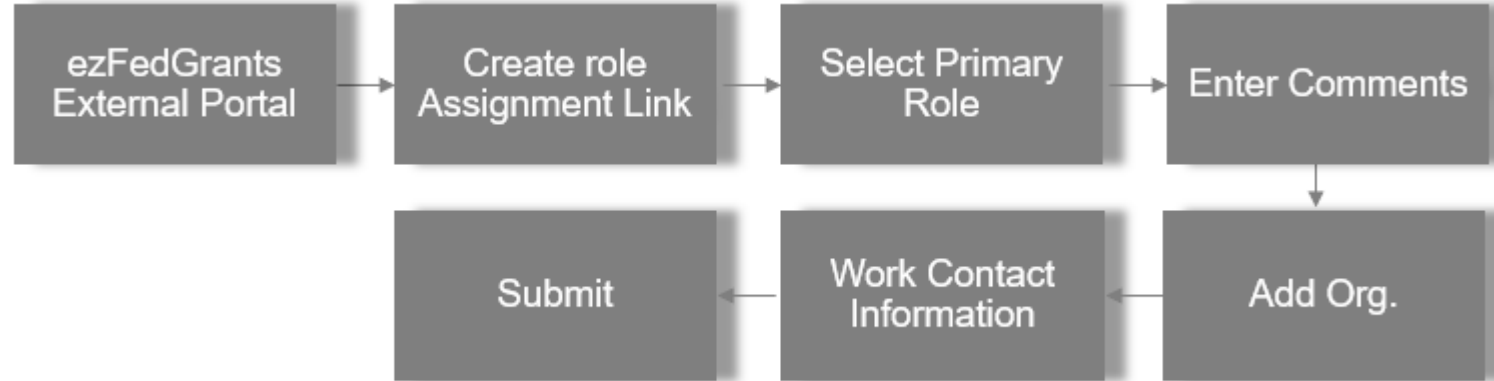
3. Select primary role.
4. In **Access Request Comments**, explain why submitting request or requesting role.
5. Click **Next** button.
6. Add **Organization**.
7. Click **Next** button.
8. Complete **Work Contact Information**.
9. Click the **Submit** button.

Grants Administrative Officer (GAO) Change

Question:

What if the employee assigned the GAO role changes within our organization?

Answer:

GAO First	Current GAO Assigns	New GAO Deactivates	Contact ezFedGrants if GAO Left	Job Aid
The first person in the system from an organization must be a GAO.	If a GAO is leaving the organization, the current GAO assigns the replacement GAO. For example, a GP becomes the new GAO.	The new GAO deactivates the previous GAO. A GAO cannot deactivate themselves.	If the GAO has already left the organization, contact the ezFedGrants Helpdesk to set up the new GAO.	Refer to the following job aid for more information: ezFedGrants Role & Access Management.

Signatory Official (SO) & Certifying Official (CO)

What is the difference between a SO and a CO?

- *You can have more than one signatory official in your organization but at least one.*

- *Signatory officials are different from certifying officials.*

- *A signatory official is a primary user role that signs applications, agreements, and amendments.*

- *Anyone can be a certifying official; it is assigned as an approver on a work item basis.*

Signatory Official (SO)

- Primary role
- Multiple SOs, if needed.
- Approves applications, agreements and amendments

Certifying Official (CO)
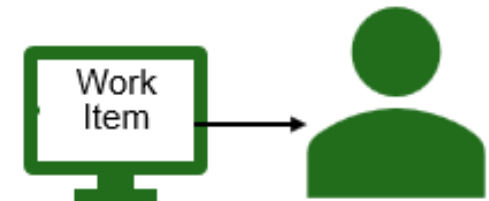
Work Item

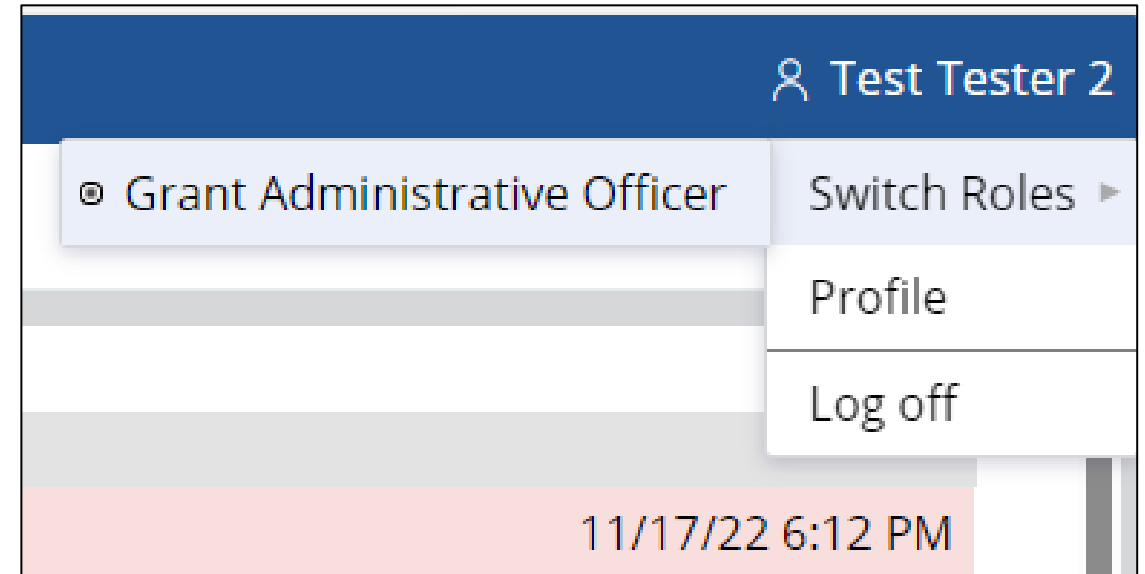- Secondary role
- CO approver assigned to work item

Question:
Is there a way to check which role(s) we have?

Answer:

- The role is displayed at the top of the **Home** screen once you are assigned one.

- You can also click **Switch Roles** at top right of the screen and your role displays.

- If it is incorrect, contact your GAO.

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Question:

When trying to submit a role assignment request, I can't find my organization.

Answer:

You can search for your organization!

1. *Enter organization **UEI** number (on your Sam.gov account) in the search criteria.*

2. *Click **Search** button.*

3. *If your organization is already in the system, it should display in the search results.*

4. *If no results are found, contact ezFedGrants help desk at ezFedGrants-cfo@usda.gov.*

ezFedGrants

Test Unregister

Role Assignment Request RA-5891

| Print | Close | Withdraw | Save | << Previous | Next >> |

Select Organization

Search Criteria - please enter one or more criteria

Organization Name | UEI Number ⑦ | EFT Number ⑦

CAGE Code ⑦ | City | State

Postal Code ⑦ | Country | ASAP ID ⑦

DUNS Number ⑦ | DUNS+4 ⑦

Multiple search criteria narrows the search (works as a **filter**)

If you do not receive the results you are looking for, **use fewer items** in your search criteria. (*i.e. Instead of City and State, remove City and leave only State*)

| Search | Clear | Close |

Unique Entity Identifier (UEI)
- Official name of non-proprietary identifier
- Replace the DUNS number
- Assigned by the System for Award Management (SAM.gov)

You should now be able to:

- Describe the difference between Grants.gov and ezFedGrants

- Explain how to register for ezFedGrants

- List the steps for obtaining a Login.gov account

- Describe recipient roles within an organization

Module 3
System Navigation

By the end of this module, you should be able to:

- View work item history

- Manage duplicate work items

- Describe the centralized workbasket policy

- Explain how workflow improves the approval process

Organization's Work Items

Question:

Why am I seeing all the progress reports for my organization within my actionable items?

Answer:

- All organization reports route to centralized workbasket.

- Avoids reports being reassigned or inaccessible due to another user accessing it.

- Having all reports accessible to all organization ezFedGrants active users reduces the number of reassigned and inaccessible reports.

- Take advantage of the **filter** options available to locate agreement-specific reports.

Filtering Work Items

Use Category Dropdown

Use Click to Filter

Case ID	▼	Transaction	▼	FAIN/ID	▼	Status	▼	Due Date		Last Update	▼

Actionable Items

Category

Application

Claim

Role Assignment Request

Report

Electronic Signature - Amendment

Electronic Signature - Agreement

Status ▼

Clear Filter

☐ [No Value]

☐ Draft

☐ Pending Clarification

☐ Pending

Apply   Cancel

Question:

- How do I view work item history?

- For example, a claim, report, or agreement.

Answer:

Open any work item.

Scroll down and click on **Additional Information**.

- **Audit** – View history of corresponding transaction

- **Partners** – Display partners listed on the agreement

- **Agency Assignments** – View agency agreement contacts

- **Emails Sent** – Provides history of email notifications distributed on item

Question:

- *When I access my **Actionable Items** list, I am seeing duplicate work items.*

- *How do I correct this?*

Answer:

- Complete one of the items and the duplicate should disappear.

- Contact the ezFedGrants helpdesk at ezFedGrants-cfo@usda.gov for additional information.

Duplicate Work Item → Complete One of the Duplicates → Should Disappear

Grants Administrator Officer (GAO) Email Automatically Generates Workflow

USDA

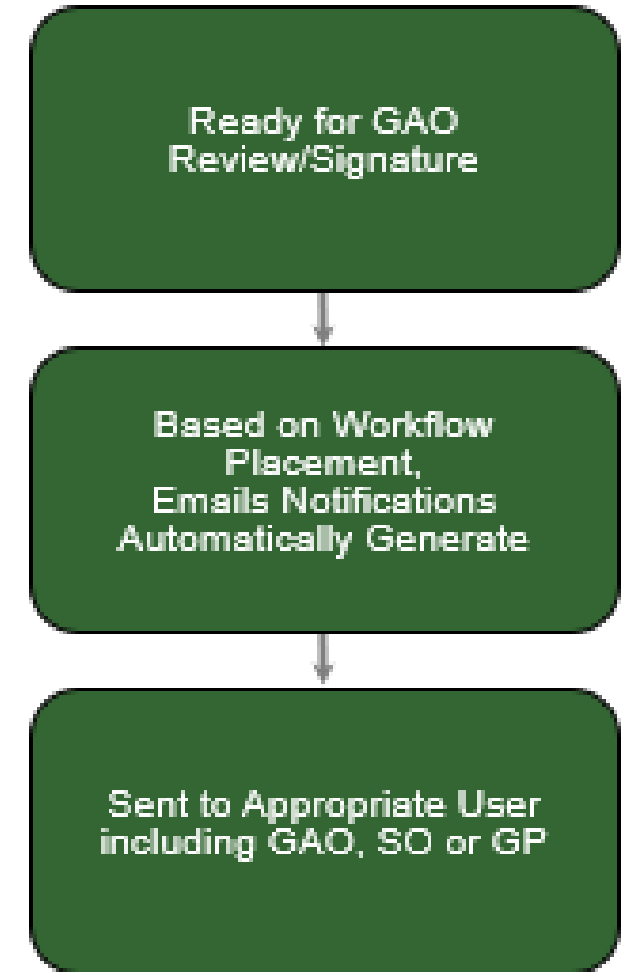**FMMI** Transforming Financials at the People's Department

Question:

Can emails automatically generate to my organization's Grants Administrative Officer (GAO) and/or reviewer when items are ready for review/signature/submittal?

Answer:

- Emails automatically generate and are sent to the appropriate personnel including GAOs, Signatory Officials, and Grants Processors.

- These notifications are based on their place in the approval workflow.

- Example:

  1. Grants Processor submits application.

  2. Organization Signatory Official(s) receives an email notification to let them know that an application is ready for review and approval.

Ready for GAO Review/Signature

↓

Based on Workflow Placement, Emails Notifications Automatically Generate

↓

Sent to Appropriate User including GAO, SO or GP

Module 3: System Navigation Summary

You should now be able to:

- View work item history

- Manage duplicate work items

- Describe the centralized workbasket policy

- Explain how workflow improves the approval process

Module 4
Agreements and Applications

By the end of this course, you should be able to:

- Locate and edit the agency Point of Contacts (POCs).

- Manage an objective or plan of work (POW) change.

- Explain the award and notifications process.

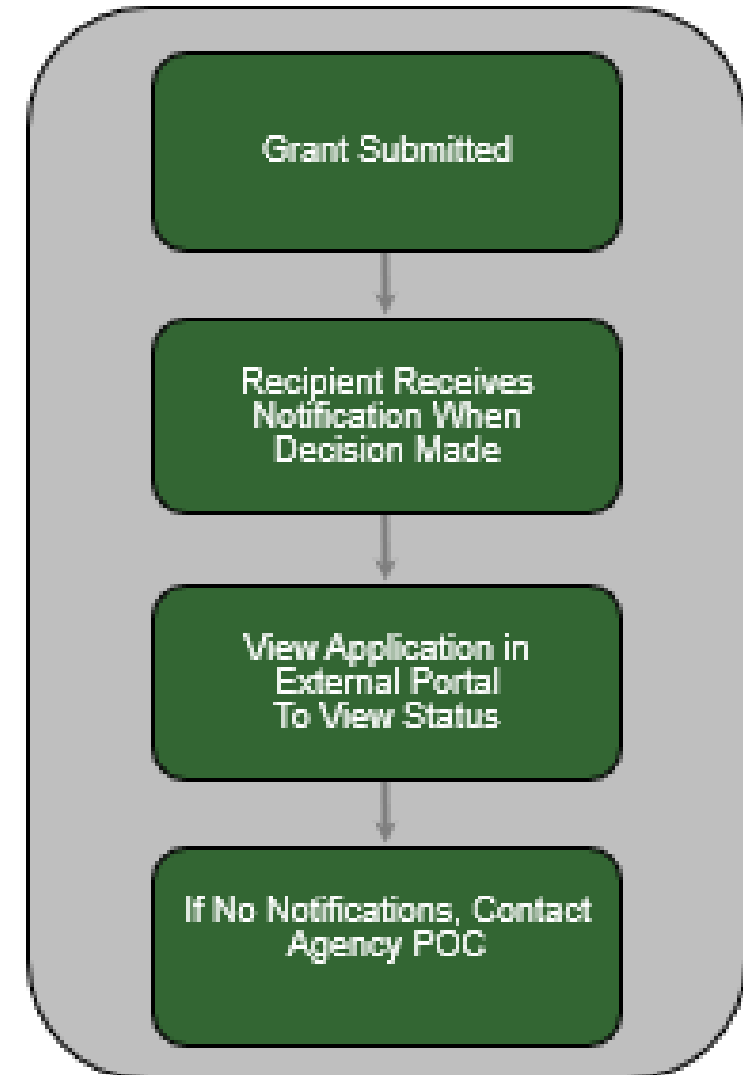- List the roles that receive notifications for accepted applications.

Question:

- Once a grant is submitted and the system shows the agency has retrieved the grant application package, will we receive any other notification?

- Wondering if there is some type of notice regardless of whether grant awarded or not.

Answer:

- View your application in the external portal to determine status initially.

- You should receive a notification when the decision is made on the application.

- If you do not, contact your Agency POC.

Grant Submitted

Recipient Receives
Notification When
Decision Made

View Application in
External Portal
To View Status

If No Notifications, Contact
Agency POC

Questions:

How do I determine my Agency Point of Contact (POC)?

Answer:

On the opportunity, there is a POC listed for any questions.

Your agreement lists at least two agency POCs for you to contact with questions.

The POC is also listed on your Agreement face sheet.

The contact information for agencies is located on our ezFedGrants website.

Agency Point of Contacts

- Opportunity ✓
- Agreement ✓
- Agreement ✓
- Agreement Face Sheet ✓
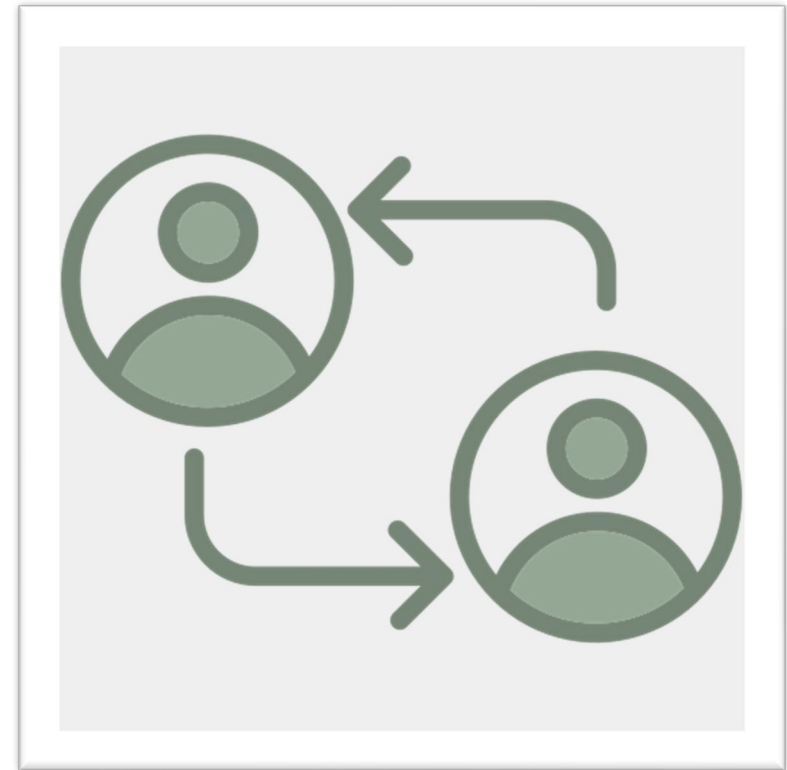- Agency Representative ✓

Question:

- How do you change the partner on the Agreement?

- For example, the administrative contact.

Answer:

- Contact the Agency POC.

Accepted Applications

Question:

Who receives notifications once an application has been accepted?

Answer:

Once an application is **Approved**, a notification goes to the following individuals:

- The application creator.

- The Signatory Official that signed it.

- All Grant Administrative Officers (GAOs) within that organization.

- Agency users listed in the opportunity.

Application Creator → Signatory Official → GAOs → Opportunity Agency Users

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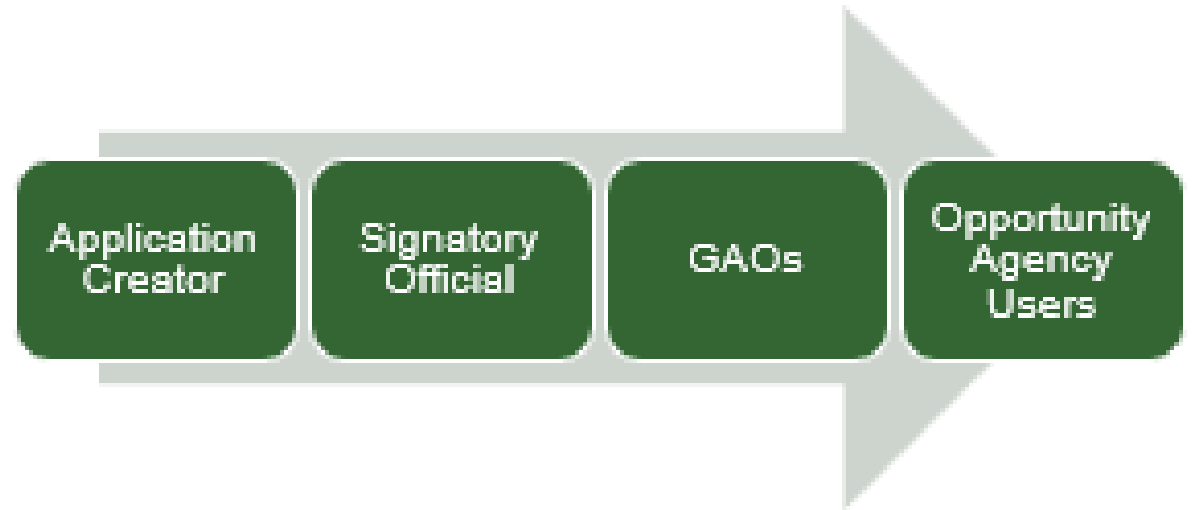
You should now be able to:

- Locate and edit the agency Point of Contacts (POCs).

- Manage an objective or plan of work (POW) change.

- Explain the award and notifications process.

- List the roles that receive notifications for accepted applications.

Module 5
Claims

By the end of this course, you should be able to:

- Answer ezFedGrants common claim questions

- Describe the claim process

- Define common claim terms

Question:

How long does it take to be reimbursed for a claim?

Answer:

- Agencies have up to 30 days to review a claim.

- It generally takes up to ten business days for a claim to be paid out after it is approved within the system.

Agency Has 30 Days to Review Claim

Usually, 10 Days for a Claim to be Paid After Approval

Question:

Why can't I submit a new claim?

Answer:

Claims cannot be submitted by recipients unless the following occur:

- All overdue progress reports are submitted and up to date.

- Progress reports are approved by the agency.

- All prior claims are approved or cancelled.

- Claims can only be submitted one at a time.

Question:

If claim is returned by the Certifying Official, is the original claim processor notified? How?

Answer:

- Yes, the original claim processor is notified by email.

- There should also be a comment within the claim explaining why it is returned.

- If you still have questions, contact your Certifying Official (CO) for the claim.

Can you return my claim please?

Question:

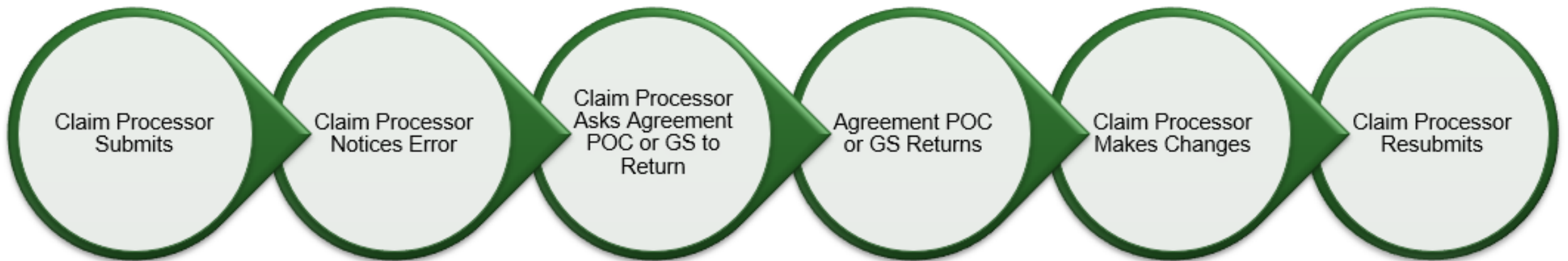When a claim is submitted, how do we request that it be returned if we've noticed an issue later?

Answer:

Reach out to your **Agreement POC** or **Grant Specialist (GS)** and explain the situation.

Claim Processor Submits → Claim Processor Notices Error → Claim Processor Asks Agreement POC or GS to Return → Agreement POC or GS Returns → Claim Processor Makes Changes → Claim Processor Resubmits

Question:

Can recipients submit advanced claims in eFG?

Answer:

- No, advance claims cannot be submitted within the system by recipients.

- The claim type option defaults to **Reimbursement** and for recipients, it cannot be changed to **Advance**.

- For an advance claim, reach out to your Agreement POC.

- Advance claims are processed by the agency at the recipient's request.

- The ability to request advances varies based on the agency you're working with and your agreement.

Question:

- Are we able to enter negative (-) claim amounts?

Answer:

- You cannot submit negative numbers. The system does not allow it.

- If you are trying to return funds to the agency, contact the Agreement POC.

- The Agency can enter a repayment request on your behalf.

Question:

- My claim has been in the status **Draft Pending Signature**.

- I don't know what my next steps are.

- Is there something I need to do on my end?

Answer:

- If a claim is in the **Draft Pending Signature** status, it is assigned to the CO.

- The CO accesses the claim from their **Actionable Items** list.

- Then, the CO signs and submits the claim to the Agency.

- If the claim has been in the **Draft Pending Signature** status for a while, contact the CO.
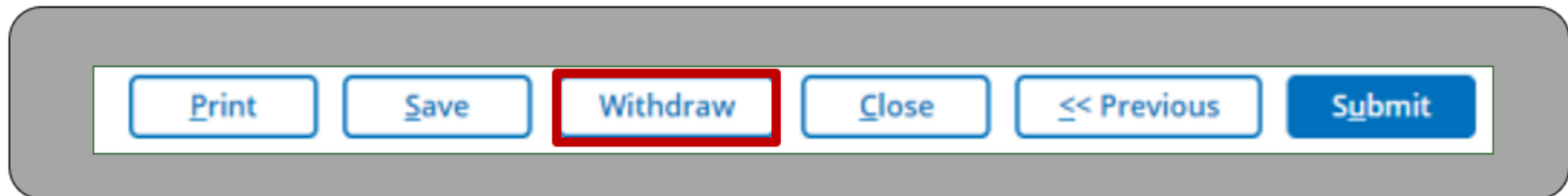
Question:

How do I cancel a claim?

Answer:

The user (GP or GAO) that originally created the claim can cancel it when it is in a draft status.

1. The user accesses the claim from their **Actionable Items** list.

2. Click the **Withdraw** button.

You should now be able to:

- Answer ezFedGrants common claim questions

- Describe the claim process

- Define common claim terms

Module 6
Repayments

By the end of this course, you should be able to:

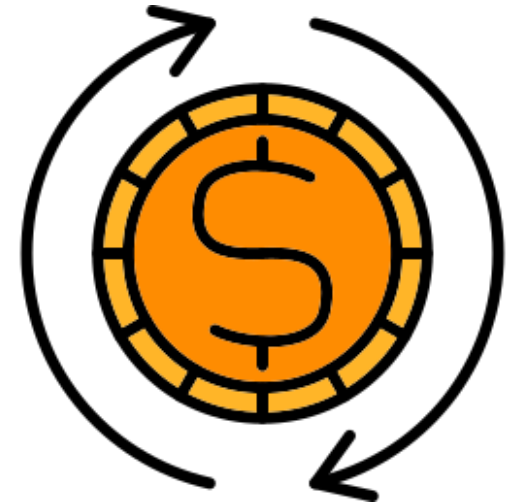- Describe the difference between a claim and repayment.

Question:

What is the difference between a claim and a repayment request?

Answer:

- *An advance claim is when the Agency pays the recipient in advance of expenditures.*

- *A reimbursement is when the recipient is provided funds after the expenditure.*

- *A rare repayment request is when USDA pays the recipient more than they should through either type of claim.*

- *This may happen for various reasons such as overestimation of costs by the recipient.*

- *Recipient needs to send the money back to USDA.*

- *Contact your agency to request a repayment and they will enter it for you!*

You should now be able to:

- Describe the difference between a claim and repayment.

Module 7
Reporting

By the end of this module, you should be able to:

- Describe how to access reports.

- List report timeframes and explain how deadlines are determined.

- Explain the report notification process.

- List the roles that submit reports.

- Determine who is working on a report.

- Explain how to access previously submitted progress reports.

Question:

How do I upload/submit a progress report?

Answer:

- Grants Processor (GP), Grants Administrative Officer (GAO) and Signatory Official (SO) submit reports.

- Progress reports are generated automatically based on the Agreement reporting schedule.

- You do not need to upload them.

- Locate the report in **Actionable Items**.

- Make appropriate changes and submit to Certifying Official (CO) for signature and submission to Agency.

  Refer to **Submit Financial or Performance Reports in EzFedGrants** job aid for details on submitting progress reports through ezFedGrants.
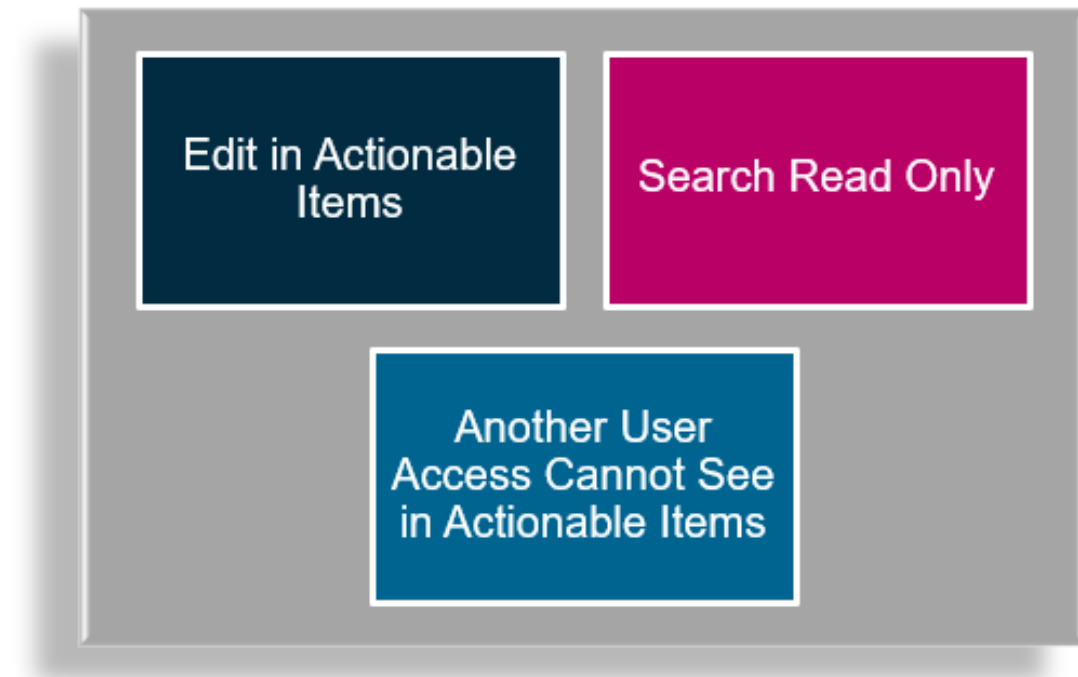
Question:

- I am trying to submit a progress report and have started the process.

- Report is saved as a draft but I am not able to go back in to edit it.

- It has disappeared from the **Actionable Items** list.

Answer:

- You can only edit reports if you've accessed them through **Actionable Items**.

- If you're searching for it, it is read-only and not editable.

- If someone else has it open, it won't show up in **Actionable Items**. This could be why it disappeared.

Edit in Actionable Items

Search Read Only

Another User Access Cannot See in Actionable Items

Who is Working on Report?

Question:

Is there a way to see who else is working on your report?

Answer:

1. Open the report.
2. Scroll down to **Additional Information**.
3. Click **Additional Information**.
4. Note audit trail of who has worked on the item.

Additional Information		
Audit	Partners	Agency Assignments	Emails Sent

History

<< | < | Page 1 of 4 | > | >>

Time ↓	Description	Performed by
1/7/25 4:28 PM	Assigned to Test Tester 3 to 'Enter Information'	Test Tester 3
1/7/25 4:28 PM	Assignment to 'complete task' completed by performing a 'StartScreenFlowAuto'.	Test Tester 3
12/31/24 2:00 AM	Assigned to ReportSubmission to 'complete task'	Agent(USDA-FW-Grantor-Work-Report.SendReportCaseBacktoWorkbasket)
12/31/24 2:00 AM	Assignment to 'Enter Information' removed via ticket.	Agent(USDA-FW-Grantor-Work-Report.SendReportCaseBacktoWorkbasket)
12/30/24 8:00 AM	Assigned to Test Tester 2 to 'Enter Information'	Test Tester 2
12/30/24 8:00 AM	Assignment to 'complete task' completed by performing a 'StartScreenFlowAuto'.	Test Tester 2
11/8/24 2:00 AM	Assigned to ReportSubmission to 'complete task'	Agent(USDA-FW-Grantor-Work-Report.SendReportCaseBacktoWorkbasket)
11/8/24 2:00 AM	Assignment to 'Enter Information' removed via ticket.	Agent(USDA-FW-Grantor-Work-Report.SendReportCaseBacktoWorkbasket)

Question:

- What if you have a report that is due per the agreement, but the report does not display within your actionable items?

- It also does not display under **Reports** when you search by FAIN.

Answer:

- If anyone else is accessing that report, it does not show up in your **Actionable Items**.

- Sometimes, the system does not create the reports which is not common. However, it does occur and if it does, contact the ezFedGrants help desk.

- The reporting schedule is dependent on your reporting schedule on the **agreement**.

Question:

- How early can we submit reports ahead of official due dates?

- Can you explain the review process post report submission on the USDA side?

Answer:

- Reports are generated based on reporting requirements in the agreement.

- Once the report is visible, you can begin the report and submit prior to the deadline.

- Reports cannot be submitted outside of the schedule.

- USDA agencies ask for 30 days to review reports.

Report Due Date Break Down

Report Type	Filing Period Requirement
Quarterly Reports	Due after 30 days in the system
Semi Annual Reports	Due after 30 days in the system
Annual Reports	Due after 120 days
Final Reports	Due after 120 days

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Question:

- We have to submit progress (financial and performance) reports through EzFedGrants.

- Will we be notified when the report becomes available in the system?

Answer:

- GAOs and agreement administrative contact receive an email that says a report is due.

- Follow these steps to access the report:

    1. Access the external portal for ezFedGrants.

    2. Locate report in the **Actionable Items** section on **Home** screen.

Question:

- Where can I locate previously submitted progress reports?

Answer:

- Search for current and previous progress reports on the eFG external portal.

- To locate a report:

    1. Click **Reports** on the navigation panel on the left side of the **Home** screen.

    2. Search using selection criteria such as FAIN.

You should now be able to:

- Describe how to access reports.

- List report timeframes and explain how deadlines are determined.

- Explain the report notification process.

- List the roles that submit reports.

- Determine who is working on a report.

- Explain how to access previously submitted progress reports.

Module 8
Closeouts

By the end of this course, you should be able to:

- Describe how to determine if an agreement is closed.

Question:

How do I know if my agreement is closed?

Answer:

- Closeout is initiated in **Internal Portal** directly by **agency** users.

- You do not need to take any action if the end date remains the same.

- Recipients receive notifications when closeout is initiated and completed.

- Check the agreement status in the external portal.

- If you have questions regarding closeouts, reach out to your agency POC.

You should now be able to:

•   Describe how to determine if an agreement is closed.

Module 9
Question and Answer Session

Topics to consider for questions include:

- eAuthentication/Login.gov

- User Roles

- Applications

- Approval Workflows

- Reports

- Claims

Module 10
Course Summary

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eAuth

- eAuthentication or login.gov password/account issues
- Contact the eAuth helpdesk at www.eauth.usda.gov/helpdesk
- Go to FAQ > Public Customer FAQs

Login.gov

- Call (844) 875-6446
- Operating hours 24 hours a day, 7 days a week
- Refer to Login.gov FAQs
- Review the Recipient training schedule

ezFedGrants

- Contact ezFedGrants help desk: ezFedGrants-cfo@usda.gov
- Training schedule: eFG Training Schedule | USDA
- Recipient job aids: Job Aid Library

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