Using ezFedGrants – Your User Profile
Job Aid

Before You Begin

This document describes how to open and modify your ezFedGrants user profile.

You Will Need
- An eAuthentication/Login.gov Verified Identity account
- The Grants Administrative Officer, Grants Processor, or Signatory Official role in the ezFedGrants External Portal

Contents

Table of Contents

Data Note

The screenshots provided with these instructions are a representative sample for the purpose of training, which contain sample data and may not depict the entire screen.

In addition, these instructions focus on the **minimum system requirements** for the above-described procedure(s). You may need to complete additional fields or provide additional information not specifically described in this document.

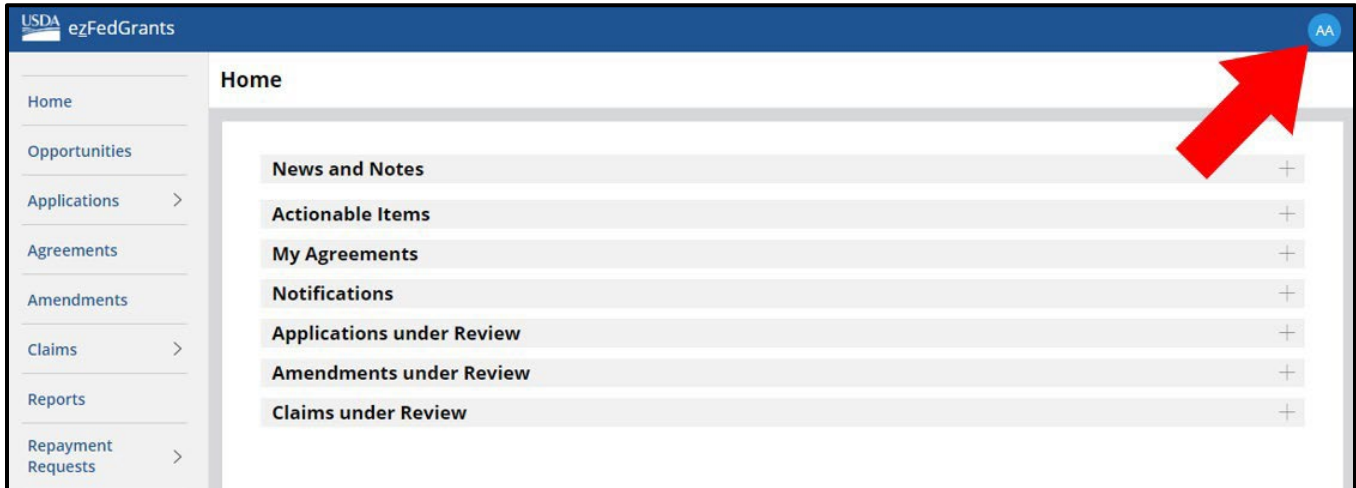# Using ezFedGrants – Your User Profile

Job Aid

Getting Started

Launch the ezFedGrants External Portal from the OCFO ezFedGrants website and log in with your Login.gov verified identity account.
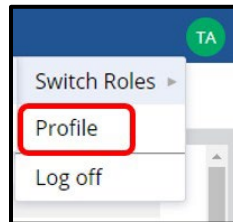
For questions regarding ezFedGrants access, including logging-in and eAuthentication, please review the eAuthentication/Login.gov FAQs.

Open Your Profile

1. Click your initials in the upper-right corner of the **Home** screen to display the **User Name** menu.

2. Click the **Profile** option on the **User Name** menu to open the **Profile** screen.

3. The **Profile** screen contains several sections of details about yourself and the organizations you are affiliated with. While some of this information is pulled from your eAuthentication profile or the records of the organization(s) that you are affiliated with, the contact details can be edited directly through ezFedGrants, as explained in the remainder of this document.

Edit Your Profile

1. Name, phone, and email cannot be edited through the Update Profile screen, this information is provided by eAuth. Any changes to those fields need to be updated via eAuth. After eAuth has been updated and the user signs back into ezFedGrants the fields will update. (A mouseover of the fields indicates that updates to those fields need to go through eAuth)

2. The users can **update** the contact details via the **Profile** screen.

3. Click the **Submit** button to save your changes, exit the **Edit Operator Profile** screen, and see the updated details on the **Profile** screen.

Using ezFedGrants – Your User Profile
Job Aid

Join Additional Organizations

Through the **Profile** screen, you can submit role assignment requests for additional organizations after you have access to ezFedGrants. Getting access for additional organizations will not impact your existing organizational affiliations.

Furthermore, you cannot remove/de-link yourself from an organization. If you are no longer affiliated with an organization, contact a user with the Grants Administrative Officer (GAO) role in that organization to be removed/de-linked.

1. Scroll down to the **Organization Details** section of the **Profile** screen and click the **Join Additional Organization** button.

   Note: This button is only available on the **Profile** screen; it is not available on the **Edit Operator Profile** screen.

2. The **Join Additional Organization** popup window will appear. On this popup window, click the **Add Organization** button to search for and select an organization. This is similar to when you selected an organization for your initial ezFedGrants Role Assignment Request.

   If you have the Grants Administrative Officer (GAO) role, you must also identify an agency who will approve your access request in the event you choose an organization that does not yet have any ezFedGrants users.

3. After selecting an organization, complete the **Point of Contact (POC) Details** fields.

4. Click the **Add Organization** button again to add another organization. You can submit multiple access requests at once. You must complete the POC Details fields for each organization, even if each organization has the same POC.

5. If you selected an incorrect organization, click the **Remove** button to remove the erroneous selection.

6. Click the **Submit** button to submit your request(s). Access must be approved for each organization separately. You may receive a notification email or message when your requests are approved, or you can check the **Profile** screen to see your active organizational affiliations.

7. **Pending Role Assignment requests** can be seen on the profile page under the **join additional organization** button.

8. If you need to review your pending role assignment request, view approver's contact information or withdraw the request, click on the case ID link.

Update Organization Data

1. If your organization data has changed (name, address, etc.) and the data has been updated in SAM.gov, click on the refresh button across from the organization name to update your profile organization data. *This only updates your profile, other users in your organization will also need to refresh the data on their profile.*

Update Role to Grants Administrative Officer (GAO)

Changing roles is generally done by the organization GAO using **Manage Permissions**. If the GAO has left the organization and there are no other active GAO's, application processors and signatory officials can request their role be changed to GAO from the appropriate agency.

1. The request is initiated by clicking on the **icon to the right of role information.** This button is only available to application processors and signatory officials. It only displays if the user belongs to one organization. Users belonging to one more than organization will need to contact the help desk for assistance.

2. Clicking on the **button** verifies if there are any active GAO's. If there are no active GAO's you will be asked to fill out the following form. Clicking **submit** creates a request to the agency to have your role assignment changed to GAO.

Profile			Update Profile	Close

Full Name   **Portal ID**   **Role Assignment**

Update Role To GAO   ✕

Please select an Agency and click the Route to Agency check box to send a request to the Agency to update your role to Grants Administrative Officer (GAO).

☑ Route Request to Agency

* Agency

[⌄]

* Supervisory Point of Contact (POC)	* School/Dept/Div/Prog.	* POC Email	* POC Phone

Cancel   Submit

Street	**House Number**	**City**	**State**
Totally Real St NE	8080	Washington	Idaho

3. If you have a role assignment request open to another organization or there is a GAO that has signed in within the last two weeks, the system will not create the request and you will receive the below message.

Profile	Update Profile

Update Role To GAO

You currently have open Role Assignment request(s) until these are completed or withdrawn you will be unable to change your Role Assignment.

You are not eligible to bypass your organizations GAO (Grants Administrative Officer) approval for a role change since at least one of your organizat... signed in within the last two weeks.
Please use the list below to contact one of your organization GAO(s) to update your role using Manage Permissions (this can be found on the left na... you have the GAO role).
Please contact the USDA help desk if all GAO(s) have left your organization.

Name	E-Mail	Phone	Last Signon
Test ARS2	celiacarson@gmail.com	(123) 456-7890	04/06/2021 03:47 PM
Test ARS	celia.carson@gmail.com	(202) 720-9999	12/07/2022 12:22 PM
ARS ARS-ST-GL-App	TEST2@GMAIL.COM	(999) 999-9999	07/26/2023 01:58 PM
app pro1001	developer@sampledata.net	(111) 555-0987	07/19/2023 03:03 PM
Fresh Opp	FreshOpp@test.com	(123) 123-1234	07/20/2023 03:59 PM

Using ezFedGrants – Your User Profile
Job Aid

Job Aids

- Role Assignment Job Aid
- Using ezFedGrants – The Basics Job Aid
- ezFedGrants External Portal User Roles Quick Reference

ezFedGrants Hyperlinks

- ezFedGrants Home page
- ezFedGrants FAQs general

Need Help?

Contact the ezFedGrants Help Desk at ezFedGrants-cfo@usda.gov.

Version Control

Name	Date	Changes Made
Abael Solomon	July 2024	Updated hyperlinks
Takia Glover	Mar. 2024	Updated Screenshots and hyperlinks; removed log-in screenshots, modified table of contents
Abael Solomon	Dec. 2023	Updated Screenshots
Kandice Whitaker	Apr. 2022	Updated OCFO email link
Abael Solomon	Jan. 2022	Removed Level 2 reference and updated OCFO website link
April Murphy	Sept. 2019	Initial document created