



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

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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.

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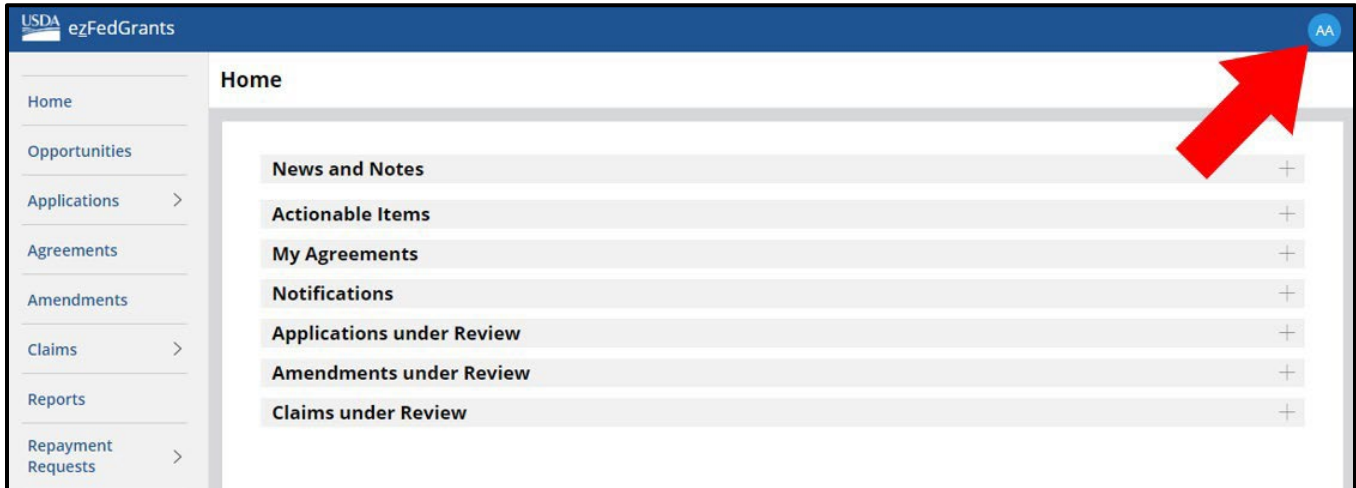
Getting Started

Launch the ezFedGrants External Portal from the [OCFO ezFedGrants website](#) and log in with your Login.gov verified identity account.

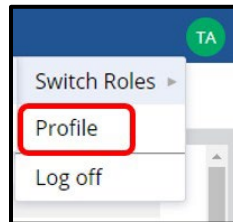
For questions regarding ezFedGrants access, including logging-in and eAuthentication, please review the [eAuthentication/Login.gov FAQs](#).

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.





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- 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.

Profile TEST GAO [Update Profile](#) [Close](#)

Full Name TEST GAO	Portal ID TESTGAO	Role Assignment GrantorImpls:GrantAdministrativeOfficer
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General Details

CRM Business Partner ID 1800001608	Title Ms.	First Name TEST	Last Name GAO
Telephone (123) 456-2222	Email Address test@gmail.com		

Contact Details

Street First Main St	House Number 1000	City Milton	State Massachusetts
Zip 12345	Country United States	Academic Title Master of Business Administration	Occupation tester
Fax N/A	Website N/A	Communication Method E-Mail	Language N/A

Organization Details

GRANTOR UNIVERSITY Name 2.



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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)

Edit Operator Profile			
General Details			
CRM Business Partner ID 1800001772	Title Mr. ▾	First Name Site	Last Name Off UR
Telephone (111) 555-0987	Email Address developer@sampledata.net		
Contact Details			
Street Totally Real St NE	House Number 8080	City Washington	State Idaho ▾
Zip 54321	Country United States ▾	Academic Title Bachelor of Arts ▾	Occupation System Developer
Fax	Website	Communication Method	Language

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

Profile			
Full Name TEST GAO	Portal ID TESTGAO	Role Assignment GrantorImpls:GrantAdministrativeOfficer	
General Details			
CRM Business Partner ID 1800001608	Title Ms.	First Name TEST	Last Name GAO
Telephone (123) 456-2222	Email Address test@gmail.com		
Contact Details			
Street First Main St	House Number 1000	City Milton	State Massachusetts
Zip 12345	Country United States	Academic Title Master of Business Administration	Occupation tester
Fax N/A	Website N/A	Communication Method E-Mail	Language N/A



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

The screenshot shows the 'Edit Operator Profile' form with the following fields and values:

General Details			
CRM Business Partner ID 1800001608	Title Ms. ▾	First Name TEST	Last Name GAO
Telephone (123) 456-2222	Email Address test@gmail.com		

Contact Details			
Street First Main St	House Number 1000	City Milton	State Massachusetts ▾
Zip 12345	Country United States ▾	Academic Title Master of Business Administration ▾	Occupation tester
Fax	Website	Communication Method E-Mail ▾	Language

Buttons: Cancel, Submit

A red arrow points from the 'Submit' button to the 'State' dropdown menu.



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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.

Organization Details

RUTGERS THE STATE UNIV OF NEW JERSE SCIENCE DEPT2 RESOURCE FOUNDATION SCHOOL OF AGRICULTURE

CRM Organization ID	DUNS	DUNS+4	CAGE
1100000234	0012345	N/A	N/A
Street Address	City	State	Postal Code
34 RUTGERS PLAZA	NEW BRUNSWICK	NJ	08901-8559
Phone	N/A		

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.

Join Another Organization ✕

Select Organization(s)

Click Find Organization to search for an organization you want to join. After selecting an organization, it will appear below. You must select at least one organization to submit your access request. Organizations must be registered on SAM.gov and have a record in the ezFedGrants System to be available for selection here. If your organization has not previously registered on SAM.gov, please complete the registration process at <https://sam.gov>. If your organization is registered on SAM.gov but does not appear here, please use the Contact USDA link on the left to contact the ezFedGrants Help Desk. Please include your organization's DUNS Number and CAGE code (if known) in your message.

If you are affiliated with multiple organizations, click Find Organization again to add more organizations.

Please provide Point of Contact (POC) details for each organization. A POC is someone from the organization who can verify your affiliation with that organization, if necessary.

Click Remove to remove an organization you do not want to join.

* Agency

v

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.



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

Update Profile Close

Profile

RUTGERS THE STATE UNIV OF NEW J SCIENCE DEPT 12 RESOURCE FOUNDATION SCHOOL OF AGRICULTURE

CRM Organization ID 1100000234	UEI TESTCRMUE001	EFT 0002	CAGE N/A
Street Address	City NEW BRUNSWICK	State NJ	Postal Code 08901-8559
Phone (000) 000-0000	ASAP ID 0876511	DUNS 0012345	DUNS+4 2055

➕ Join Additional Organization

Below is a list of cases pending approval (per organization). Please click on the Case ID link to **review** or **edit** the request.

Review/Edit	Role	Organization	Create Date	Approver
RA-13952	Grant Administrative Officer	RUTGERS THE STATE UNIVERSITY OF NEW	8/2/23	Agency: APHIS

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.

➕ Join Additional Organization

Below is a list of cases pending approval (per organization). Please click on the Case ID link to **review** or **edit** the request.

Review/Edit	Role	Organization	Create Date	Approver
RA-13952	Grant Administrative Officer	RUTGERS THE STATE UNIVERSITY OF NEW	8/2/23	Agency: APHIS

- Review Request
- View Approvers
- Withdraw Request



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Update Organization Data

1. If your organization data has changed (name, address, etc.) and the data has been updated in [SAM.gov](https://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.*

Profile TEST GAO

[Update Profile](#) [Close](#)

Street Address	City	State	Postal Code
	College Station	TX	77843
Phone	ASAP ID	DUNS	DUNS+4
N/A	N/A	619003127	N/A

RUTGERS THE STATE UNIV OF NEW J SCIENCE DEPT2 RESOURCE FOUNDATION SCHOOL OF AGRICULTURE 🔄

CRM Organization ID	UEI	EFT	CAGE
1100000234	TESTCRMUE001	0002	N/A
Street Address	City	State	Postal Code
	NEW BRUNSWICK	NJ	08901-8559
Phone	ASAP ID	DUNS	DUNS+4
(000) 000-0000	0876511	0012345	2055

[Join Additional Organization](#)

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.

Profile sig off1001

[Update Profile](#) [Close](#)

Full Name	Portal ID	Role Assignment
sig off1001	sigoff1001	GrantorImpls:SignatoryOfficial

🔄
Click for eligibility to Change Role to GAO

General Details

CRM Business Partner ID	Title	First Name	Last Name
1800001036	Mr.	sig	off1001
Telephone	Email Address		
(515) 664-9786	nrcsps01@gmail.com		

Contact Details

Street	House Number	City	State
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- 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.

The screenshot shows a web form titled "Update Role To GAO" within a "Profile" window. The form includes a header with "Full Name", "Portal ID", and "Role Assignment". Below the header, there is a checkbox for "Route Request to Agency" which is checked. A dropdown menu for "Agency" is present. There are four input fields: "Supervisory Point of Contact (POC)", "School/Dept/Div/Prog.", "POC Email", and "POC Phone". At the bottom of the form are "Cancel" and "Submit" buttons. Below the form, a table shows address information: Street (Totally Real St NE), House Number (8080), City (Washington), and State (Idaho).

- 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.

The screenshot shows the "Update Role To GAO" form with an error message. The message states: "You currently have open Role Assignment request(s) until these are completed or withdrawn you will be unable to change your Role Assignment." and "You are not eligible to bypass your organizations GAO (Grants Administrative Officer) approval for a role change since at least one of your organization signed in within the last two weeks." Below the message is a table of organization GAOs.

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



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Comments

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