



ezFedGrants Application Approval Process Job Aid



Purpose

This job aid provides details on approving an application submitted by a recipient through the ezFedGrants External Portal. Once an application is approved, an agreement can be created between the awarding agency and the recipient organization.

Some applications will go through a panel review activity called the Application Review Process (ARP).

The Procedure section of this document has been divided into the following subsections:

- **Initiating Application Review**
- **Reviewing ARP-Relevant Applications**
- **Reviewing Non-ARP-Relevant Applications**

Trigger

Perform this procedure when an application is submitted through the ezFedGrants External Portal by a recipient organization, or when an application submitted through Grants.gov has been migrated into the ezFedGrants External Portal.

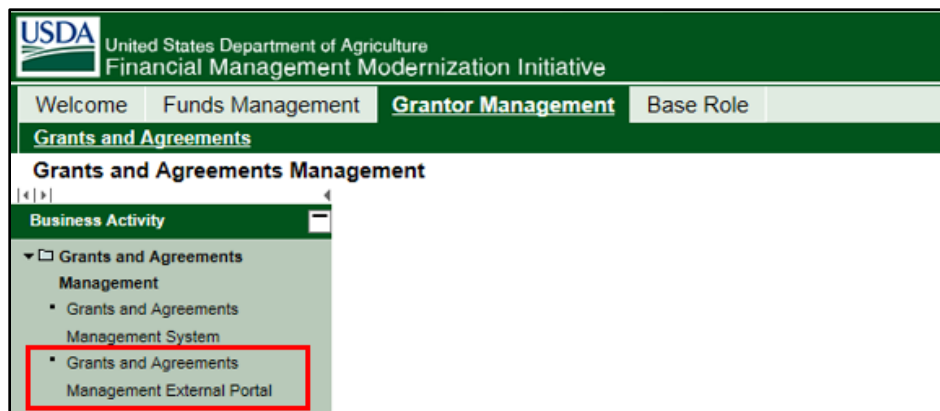
Prerequisites

- You must have access to the ezFedGrants External Portal with a user role capable of reviewing applications.
- Applications (both ARP- and non-ARP-relevant) must be in **Submitted** status before the approval workflow can begin.
- For ARP-relevant applications, a panel must review the application in order to complete the approval procedure.
 - You may assign a panel immediately, or delay panel assignment if you would like to create a new panel or edit an existing panel before initiating the ARP.
 - Please refer to the **ezFedGrants Panel Creation and Management Job Aid** for more information.

Menu Path

Use the following menu path to begin this procedure:

- **eAuthentication > FMMI Portal > Grantor Management > Grants and Agreement Management > Grants and Agreements Management External Portal**





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Helpful Hints

- Review the application in detail before making a decision. This job aid covers on the minimum steps required to move an application through the system. It falls to each user to perform adequate due diligence when reviewing applications.
- If an application retrieved from Grants.gov is marked as **Received with Errors**, then the applicant has not completed the minimum fields required for the application to function in the ezFedGrants System. You must request the applicant to submit a corrected application.
- At each approval stage, a work item will be sent to the appropriate approver, requiring the user to make a selection from the **Decision** dropdown menu on the **Application** Screen.
 - ARP-relevant applications will send work items to all relevant panel members for each stage of the ARP.
- On certain screens you may need to scroll to view additional data fields.
- Workflows and application status titles vary by agency and office. Consult your agency-specific reference materials for more information.
- Certain screenshots may display only a portion of the screen. Note that when working within a system, only the center body of the screen will change. The navigation options along the left side of the screen and the header bar across the top of the screen will remain the same.

Note: Data used in this procedure is a representative sample for the purpose of training. Actual data in the system may vary based on agency and scenario.



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Procedure

Initiating Application Review

This section describes how to initiate the application review process by locating an application pending review.

1. Start the procedure by accessing the **ezFedGrants External Portal Home Screen**.

Title	User Type	Last Updated	Edit	Delete
Test	Both	8/3/16 2:11 PM	Edit	Delete
	Internal	7/27/16 11:11 AM	Edit	Delete
Test Both	Both	7/25/16 1:12 PM	Edit	Delete
Test External	External	7/25/16 1:12 PM	Edit	Delete
Test Internal	Internal	7/25/16 1:12 PM	Edit	Delete

2. Click the **Pending Applications** tile to open the **Pending Applications for Past 90 Days** popup window and view applications pending your review.



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- In the **Pending Applications for Past 90 Days** popup window, locate the application you would like to review and click the link in the **Application ID** column.

Upon clicking an **Application ID** link, the **Application** screen will open where you will review the application.

Note: To view the opportunity that the application was submitted against, click the link in the **Funding Opportunity Number** column.

You may view filter options this list by clicking the small arrows at the top of each column. If the application was submitted more than 90 days ago, click the **View All Pending Applications** link at the bottom of the popup window.

Application ID	Funding Opportunity Number	Funding Opportunity Title	Status	Last Updated
APHIS-APP-63	USDA-APHIS-10025-ACXXXXXX-16-0	Keith APHIS Opportunity - 02	Accepted/Recomm	7/14/16
APHIS-APP-224	USDA-APHIS-10025-ACXXXXXX-16-0	APHIS Scenario 3 ST Pass 2	Submitted	8/2/16
APP-3698	USDA-APHIS-10025-PPQFLDOP-16-0	ST Smoke Hook - APHIS - 06-26-1	Submitted	6/29/16
APP-3702	USDA-APHIS-10025-PPQFLDOP-16-0	Test ST Hook Smoke - 06-26-16	Accepted/Recomm	8/1/16
APP-3703	USDA-APHIS-10025-PPQFLDOP-16-0	Test ST Hook Smoke - 06-26-16	Submitted	6/30/16
APHIS-APP-128	USDA-APHIS-10025-PPQHXXX-16-0	Opportunity 1817	Considered	8/2/16
APHIS-APP-243	USDA-APHIS-10025-PPQHXXX-16-0	Opportunity 1817	Withdrawn	8/8/16
APHIS-APP-231	USDA-APHIS-10025-PPQHXXX-16-0	Opp for TC.APHIS.3209.010	Considered	8/3/16
APHIS-APP-235	USDA-APHIS-10028-ACXXXXXX-16-0	New Opp	Submitted	8/3/16
APHIS-APP-204	USDA-APHIS-10028-PPQHXXX-16-0	Saving Endangered Trees from P	Submitted	7/27/16
APHIS-APP-205	USDA-APHIS-10028-PPQHXXX-16-0	Saving Endangered Trees from P	Submitted	7/27/16



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Reviewing ARP-Relevant Applications

This section describes how to review applications which must pass through the Application Review Process (ARP). This applies to applications submitted against competitive opportunities.

In addition to the various stages of panel review, applications may also be reviewed by one or more additional approvers based on agency-specific requirements.

For applications currently undergoing panel review, the **Application** screen will display two statuses:

- **Status:** Indicates the overall application status
 - Is visible to the applicant
 - As long as the application is in the ARP, this status will be **Considered**
- **Review Status:** Indicates the application's stage in the ARP
 - Only visible to internal users (not the applicant)



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1. On the **Application** screen, review the application by clicking each of the available tabs in the **Application** section.

Once you have reviewed the application, click the **Please select and option** menu in the **Decision** section. Select the appropriate option from the **Decision** dropdown menu based on your review of the application.

The actual options on this menu vary based your agency-specific approval procedures and the current stage of the approval process. Some options include:

- **Consider and Send to Panel:** Accept the application and assign a panel to review the application
- **Consider Pending Panel Assignment:** Accept the application, but delay assigning a panel
 - You may wish to select this option if you would like to create a new panel, or edit an existing panel, before initiating the ARP.
- **Not Consider:** Reject and close the application
 - Please compare with the **Cancel** option, below.
 - Use this option when a legitimate application has been submitted, but it does not pass review for awarding.
- **Return:** Send the application back to the applicant for editing
 - This option is not available for applications submitted through Grants.gov. If a Grants.gov application requires editing, use the **Cancel** option and request the applicant to submit a new application.
- **Cancel:** Nullifies the application
 - This is different from a rejection (**Not Consider**).
 - You may wish to use the **Cancel** option if an applicant submitted a duplicate application and one application should be marked void, but not rejected.
 - You must provide justification comments when using the **Cancel** option.

Application (APHIS-APP-245) Close

Status: Submitted

DECISION:

Please select an option ▾

- Consider and Send to Panel
- Consider Pending Panel Assignment
- Not Consider
- Return
- Cancel

APPLICATION

SF-424 SF-424A Partners Additional Details Attachments



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2. If you have selected the **Consider and Send to Panel** option, a second dropdown menu will appear in which you will assign a panel to review the application.

Panels listed in this dropdown menu were created under the same opportunity as the one which the application was submitted against. If there are no panels listed, you can choose to create a panel.

Once you have selected a panel, you can edit panel roles or add new panels members for this specific application review.

Note: Please refer to the **ezFedGrants Panel Creation and Management Job Aid** for more information on creating panels and editing existing panels.

DECISION:

Please select an option ▼

Send to Panel

- ARP Regression - 1 Reviewer (16-PAN-0700-10-075)
- test (16-PAN-0700-10-085)
- MegaPanel: Episode II (16-PAN-0700-10-078)

3. Regardless of the option you have selected, the **Submit** button will appear on the **Application** screen. Once you've completed any necessary fields or additional menu selections, click the **Submit** button to finalize your decision.

Depending on your decision and your agency-specific procedures, the application will advance to the next approver, commence the ARP, become void, or be returned to the applicant.

DECISION:

Please select an option ▼

Submit

Approve



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Reviewing Non-ARP-Relevant Applications

This section describes how to review applications which are submitted against non-competitive opportunities and do not require panel review.

Applications may pass through one or more approvers based on agency-specific procedures.

1. On the **Application** screen, review the application by clicking the available tabs in the **Application** section.

Once you have reviewed the application, click the **Please select an option** menu in the **Decision** section. Select the appropriate option from the dropdown menu based on your review of the application.

The actual options on this menu vary based your agency-specific approval procedures and the current stage of the approval process. Some options include:

- **Approve:** Accept the application
 - The application will advance to the next approver in the workflow, if applicable
 - If you are the final approver, the application will be fully approved and ready for agreement creation.
- **Not Approve:** Reject and close the application
 - Please compare with the **Cancel** option, below.
 - Use this option when a legitimate application has been submitted, but it does not pass review for awarding.
- **Return:** Send the application back to the applicant for editing
 - This option is not available for applications submitted through Grants.gov. If a Grants.gov application requires editing, use the **Cancel** option and request the applicant to submit a new application.
- **Cancel:** Nullifies the application
 - This is different from a rejection (**Not Approve**).
 - You may wish to use the **Cancel** option if an applicant submitted a duplicate application and one application should be marked void, but not rejected.
 - You must provide justification comments when using the **Cancel** option.

The screenshot shows the 'Application (APHIS-APP-63)' interface. At the top right is a 'Close' button. Below the title bar, the status is 'Accepted/Recommended'. The 'DECISION:' section contains a dropdown menu labeled 'Please select an option' and a 'Submit' button. The dropdown menu is open, showing three options: 'Approve', 'Not Approve', and 'Cancel'. The 'Approve' option is highlighted with a red box. Below the dropdown, there is a text input field with the placeholder text 'Please C... Approve Application'.



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2. Regardless of the option you have selected, the **Submit** button will appear on the **Application** screen. Once you've completed any necessary fields or additional menu selections, click the **Submit** button to finalize your decision.

Depending on your decision and your agency-specific procedures, the application will be ready for agreement creation, advance to the next approver, become void, or be returned to the applicant.

A screenshot of a web application interface for decision-making. It features a white background with a thin black border. At the top left, the word "DECISION:" is written in bold black text. Below this, there are two buttons: a green button with the text "Please select an option" and a small downward arrow, and a white button with a red border and the text "Submit". Underneath the buttons, the word "Approve" is displayed in a grey font. At the bottom of the screen, the instruction "Please Click Submit to Approve Application" is written in bold black text.

DECISION:

Please select an option ▼ **Submit**

Approve

Please Click Submit to Approve Application



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Comments

Additional Information

Refer to the following additional materials:

- ezFedGrants Agency-Specific Reference Guides
- ezFedGrants External Portal Overview and Navigation for Internal Users Job Aid
- ezFedGrants Manual Application Retrieval Job Aid
- ezFedGrants Panel Creation and Management Job Aid
- ezFedGrants Opportunity Management Job Aid

Version Control

Name	Date	Changes Made
April Murphy	Prior to 2/20/2017	Initial Document Created
April Murphy	3/7/2017	Comments: Added section headers; added version control table; corrected referenced job aid titles Purpose: Clarified introductory paragraph; added contents; clarified helpful hints and prerequisites Procedure: Added additional subsection headings and improved existing headings; generally improved and clarified content throughout Images: Improved 508 alt text and image descriptions