**Functional/Process Area: ezFedGrants**

**Purpose/Background**
The purpose of this Job Aid is to provide procedures to request access to the ezFedGrants external portal and to manage permissions within the external portal.

The following process areas are used for requesting access and for managing permissions in the system:

- **Process 1:** Request a USDA Level 2 eAuthentication account (Page 3)
- **Process 2:** Request access to the ezFedGrants external portal (Page 9)
- **Process 3:** Approve Access in the ezFedGrants external portal (Page 13)

**Role(s)**
The following role(s) and user designation(s) are required to gain access to the ezFedGrants external portal:

- Local Registration Authority (LRA)
- Agency Grants Management Officer (AGMO)
- Grant Administrative Official (GAO)

**Prerequisites**
Prior to gaining access to the ezFedGrants external portal, the following must occur:

- There must be a vendor record created in the USDA FMMI system for your organization.
- Your organization must have a Data Universal Number System (DUNS) number. To receive a DUNS number, register on SAM.gov (System of Award Management).
- Know your DUNS and Commercial And Government Entity (CAGE) number so that you can properly identify your organization when requesting a role. Requesting the wrong organization could lead to improper payments.

**NOTE: If you do not know any of the above information, please contact your agency POC prior to requesting a role in ezFedGrants.**

**Workflow Overview**
Figure 1 provides a high-level overview of the Request Access process.

**Figure 1: The Request Access Process**

![Diagram of Request Access Process]

11/29/2016
Menu Path
The path for requesting access:

1.) eAuthentication → External ezFedGrants Portal → Main Menu → Request Access;
The path for managing permissions:

1.) eAuthentication → External ezFedGrants Portal → Main Menu → Request Access

Conventions
Table 1 identifies the conventions that are used to assist with completing the Process Steps.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Indicates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bold</td>
<td>Action required for the step</td>
</tr>
<tr>
<td>Italics</td>
<td>Specific users, names, fields, icons, buttons, or filenames</td>
</tr>
<tr>
<td>Brackets [ ]</td>
<td>Keyboard item</td>
</tr>
<tr>
<td>Quotation marks “....”</td>
<td>What must be typed in the field. The content between the quotation marks is typed exactly as it appears. Do not include quotation marks in the field.</td>
</tr>
<tr>
<td>Characters “&lt; &gt;”</td>
<td>Type of data or variables needed to complete the action. The “&lt; &gt;” are not included.</td>
</tr>
<tr>
<td>Circles, rectangles, text boxes</td>
<td>Displayed on the screens in various colors to label important features or actions associated with the screen.</td>
</tr>
</tbody>
</table>

Note: Certain screen resolutions may affect the viewing area of menus, screens, and the generated report. Use the horizontal and vertical scroll bars or directional arrows to view all items.

Process Steps
The following detailed steps illustrate how to request access to the ezFedGrants external portal.

Request Access and Manage Permissions
This Job Aid details the process steps to gain access to the ezFedGrants external portal and the associated roles for each step in the process.
ezFedGrants external users must obtain an USDA Level 2 eAuthentication account before requesting access to the external portal. This account will allow access into the ezFedGrants external portal home page where users can request access to the system. Access to the system is requested electronically via the portal and is approved by the AGMO and by the organization’s GAO.

The following are detailed steps to request a USDA Level 2 eAuthentication account.

1. **Click** on the following link: [https://www.eauth.usda.gov/MainPages/index.aspx](https://www.eauth.usda.gov/MainPages/index.aspx) and **click Create an Account** (Figure 2).

   ![Figure 2: eAuthentication Home Page](image)

2. **Click Register for a Level 2 Account** (Figure 3), under the “USDA Customers – What Level of Access Do You Need?” section
Figure 3: Create an Account Screen
3. **Complete** the required information (denoted in red with an * *) on this screen and click **Continue** (Figure 4).

![Figure 4: Step 1 Access Account Registration](image)

4. **Verify** the information on the screen is correct and click **Submit** (Figure 5).

![Figure 5: Step 2 Access Account Verification](image)
5. You will receive a notice that a confirmation e-mail (Figure 6) has been sent to the e-mail address you provided. **Check** your e-mail to verify you have received the confirmation e-mail. Please note that it could take up to 24 hours to receive the confirmation email.

   **Figure 6: Step 3 Print Confirmation e-mail**

6. Once you receive the confirmation e-mail (Figure 7), follow the instructions provided.

   **Figure 7: Confirmation e-mail**
7. Once you have completed steps 1-3 from the confirmation e-mail, your account will be activated with a Level 1 access. In order to obtain Level 2 access you will need to contact a Local Registration Authority (LRA), located at a USDA Service Center for the final Level 2 activation. Click on the Find an LRA (Figure 8) link to find an LRA in your area.

![Figure 8: Step 4 Account Activated](image)

8. Click on the state that you are located in. We have selected Pennsylvania in the example (Figure 9).

![Figure 9: LRA Location Map](image)
9. A list of all LRA’s located in your state will appear (Figure 10), including the address, phone number, street map, and driving instructions for each location. **Please call the telephone number listed for the Service Center nearest you for an appointment before your visit.** Remember to bring at least one form of a government-issued picture ID and the email address that you used to register for the eAuthentication.

![Service Center Locator](image)

**Figure 10: List of LRA Locations**

10. Once your visit to a LRA has been completed, you will receive an email confirming that you now have a Level 2 eAuthentication account.
**Process 2: Request access to the ezFedGrants external portal**

**Role(s):**
- Agency Grants Management Officer (AGMO)
- Grant Administrative Official (GAO)
- Grant Processor
- Signatory Official

The following are detailed steps to request access to the ezFedGrants external portal.

**Click** on the following link: https://grants.fms.usda.gov/ to log in to the ezFedGrants External Portal. Log in using your Level 2 eAuthentication user ID and password (Figure 11).

![Figure 11: eAuthentication Login](image1)

1. The ezFedGrants External Portal home page will appear. **Click Request Access** in the upper left corner (Figure 12) of the screen.

![Figure 12: Request Access Home Page](image2)
2. **Search** for your organization by inputting the organization name, city, state, or postal code and **clicking** *Search* (Texas A&M is shown as an example). If you cannot locate your organization please contact your agency POC and they will assist you in identifying your organization. **Click** *Join Recipient* within the Search Results table. **Click** *Next >>* in the upper right corner (Figure 13).

![Figure 13: Select Organization](image)

3. **Enter** your organizational affiliation, work contact information, reason for requesting ezFedGrants External Portal access, and the role you require (Figure 14). Requests for the first Grant Administrative Official at your organization are sent to the Agency Grants Management Officer for approval. Requests for Grant Processor and Signatory Official are sent to your organization’s Grant Administrative Official for approval. **Click** *Submit* in the upper right corner to complete your access request. Once the access request is approved, you will be notified by email and may gain access to the ezFedGrants External Portal at

There are three separate roles in the ezFedGrants external portal. Each role has the ability to perform specific roles within the portal.

Table 2: ezFedGrants External Role Functions

<table>
<thead>
<tr>
<th>ezFedGrants External Portal Role</th>
<th>Role Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant Administrative Official (GAO)</td>
<td>• Manage Permissions</td>
</tr>
<tr>
<td></td>
<td>• Search and View Opportunities</td>
</tr>
<tr>
<td></td>
<td>• Create and Edit Applications</td>
</tr>
<tr>
<td></td>
<td>• Search and View Applications</td>
</tr>
<tr>
<td>Grant Processor</td>
<td>• Search and View Opportunities</td>
</tr>
<tr>
<td></td>
<td>• Create and Edit Applications</td>
</tr>
<tr>
<td></td>
<td>• Search and View Applications</td>
</tr>
<tr>
<td>Signatory Official</td>
<td>• Search and View Opportunities</td>
</tr>
<tr>
<td></td>
<td>• Edit, Search, and View Applications</td>
</tr>
<tr>
<td></td>
<td>• Provide Application Signature</td>
</tr>
</tbody>
</table>

4. When an organization is requesting access for the first time, a Grant Administrative Official will be approved by the AGMO before any other role can be approved.

Note: A Grant Administrative Official has yet to be established if the administrator contact information is blank (Figure 15).
Figure 15: Request Access Submitted Screen
Process 3: Approve Access in the ezFedGrants external portal

Role(s):
- Grant Administrative Official (GAO)

The Grant Administrative Official manages the users of that organization’s account. The GAO approves all user requests in the account, has the ability to change a user’s role, and can also deactivate a user.

1. The GAO will receive an email notification (Figure 16) that a new user has requested access to their organization’s account in the external portal. Click on the link in the email to be directed to the ezFedGrants external portal.

![Email notification showing access request](image)

Figure 16: Access Request Email Notification

2. **Click** on the *Actionable Items* tile on the external portal home page. A popup window will appear listing your actionable items for the past 90 days. **Click** on the Request Access *Transaction ID* associated with the request access item (Figure 17). This will take you to the Request Access page (Figure 18).

Note: Please make sure that you allow pop-ups from this site.
3. The Request Access page will show the status of the request as Submitted. The GAO will then **click** on *Please selection an option* drop down and select either *Accept* or *Reject.*

![Request Access Page](image-url)
4. The Request Access page will update with a comment box. Input any comments and then **click Submit** (Figure 19).

![Request Access Submission Page](image)

**Figure 19: Request Access Submission Page**

5. A new screen will pop up letting the GAO know that the status has changed to Rejected or Approved (Figure 20).
6. The user who requested access to the system will then receive an email notification, notifying that user that their request has been rejected or accepted (Figure 21). If accepted, the notification will include a link to the portal to which they can log into using their Level 2 eAuthentication username and password. If rejected, the notification will include a brief description as to why the user was rejected.

![Figure 21: Access Request Notification Email](image-url)