



ezFedGrants Opportunity Management Job Aid



Purpose

This job aid provides details on creating, editing, publishing, and canceling opportunities.

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

- **Creating Opportunities**
- **Managing Opportunities**
 - **Withdrawing a Published Opportunity**
 - **Modifying or Cancelling an Opportunity**

Trigger

Use the information in this job aid when you need to create, edit, publish, withdraw, or cancel an opportunity.

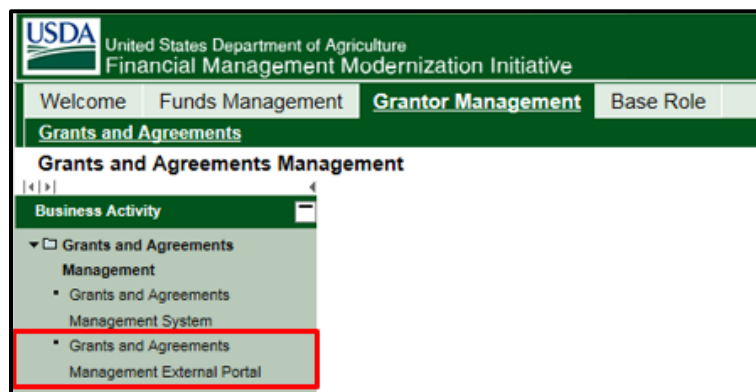
Prerequisites

- You must have access to the FMFI System and the ezFedGrants External Portal.
- You must have an ezFedGrants External Portal role with the appropriate permissions to create and/or edit opportunities.
- In order to be added as a contact for an opportunity, the user must have logged into both the ezFedGrants Internal and External Portals at least once and have been added as a partner to the relevant program in the Internal Portal.

Menu Path

Use the following menu path to begin this procedure:

- **eAuthentication > FMFI Portal > Grantor Management > Grants and Agreements Management > Grants and Agreements Management External Portal**



Helpful Hints

- On certain screens you may need to scroll to view additional data fields.
- 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

Creating Opportunities

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

Title	User Type	Last Updated	Edit	Delete
New ezFedGrants Functionality (12/01/2016)	Both	11/15/16 7:09 PM	Edit	Delete
System Updates (10/01/2016)	Both	11/15/16 7:07 PM	Edit	Delete

2. Click the **Opportunities** tile and click the **Create Opportunities** link. The **Create Opportunity** screen will open.

The screenshot shows the 'Opportunities' tile in the navigation menu highlighted with a red box. A dropdown menu is open over this tile, showing two options: 'Search Opportunities' (with a magnifying glass icon) and 'Create Opportunities' (with a plus icon).



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- There are five stages to opportunity creation, indicated by the blue circles at the top of the **Create Opportunity** screen. Information for some of these stages will populate automatically based on your agency association.

The first stage is **Summary Information of Funding Opportunity Announcement**. Complete the following tasks for this stage:

- Click in the **Funding Opportunity Title** field and type a title for your opportunity.
- Click the **Program ID** field and select the appropriate program ID from the dropdown menu.
- Click the **Catalog of Federal Domestic Assistance (CFDA) Number** field and select the correct CFDA number from the dropdown menu.
- Click in the **Fiscal Year** field and type the relevant fiscal year for the opportunity.
- Click the **Intended Federal Award Type** field and select the award type from the dropdown menu.
- Click the **Request Type** field and select the request type from the dropdown menu.
- Click the **Application Availability Start Date** field and select the start date from the dropdown calendar.
- Click the **Application Availability End Date** field and select the end date from the dropdown calendar.
- Select any relevant options in the **Justification of Non-Competition** section.
- Any other fields as necessary based on your agency requirements.

Note: Not all of these fields are visible in the below screenshot.

The screenshot shows the 'Create Opportunity' form with a progress bar at the top indicating five stages. Stage 1, 'Summary Information of Funding Opportunity Announcement', is currently active. The form includes a 'Basic Opportunity Setup' section with the following fields:

Federal Agency Name	Animal and Plant Health Inspection Service
* Funding Opportunity Title	
* Announcement Type	Initial Announcement of this funding opportunity
Higher-Level ID	
* Program ID	Select ...



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- Once you have completed all the necessary fields in the first stage, click the **Next** button to advance to stage two: **Full Text of Announcement**.

Complete the text entry fields on this screen to create the full text of the opportunity announcement. Any fields required by the ezFedGrants System are indicated by an asterisk (*). You may need to complete additional fields based on your agency requirements.

Note: Not all required fields are visible in the screenshots for this stage.

The screenshot shows the 'Create Opportunity' form. At the top right, there are buttons for 'Print', 'Save', 'Close', '<< Previous', and 'Next >>'. The main content area is divided into sections. The first section is 'Type of Federal Award', which contains a rich text editor with a toolbar and a text area containing the text 'Grant Agreement'. Below this is the 'Eligibility Information' section, which includes 'Eligible Applicants' with another rich text editor.

- Be sure to scroll then entire length of the page to ensure you have completed all relevant fields and selections, including the **Submission Deadlines and Times** and **Funding Restrictions** sections.

The screenshot shows the 'Create Opportunity' form, scrolled down to the 'Submission Deadlines and Times' section. This section includes fields for 'Date' (11/12/25) and 'Time (EST)' (11:59:00 PM). There is a dropdown menu for 'Intergovernmental' and a question 'Is application subject to order 12372 process?' with radio buttons for 'Yes' and 'No' (selected). Below this is the 'Funding Restrictions' section, which contains a rich text editor.



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6. At the bottom of the page, enter the **Contacts** for your opportunity.

Create Opportunity Print Save Close << Previous Next >>

Opportunity Distribution List

a. Contact	<input type="text"/>	Email	<input type="text"/>	Phone	<input type="text"/>	Clear
b. Contact	<input type="text"/>	Email	<input type="text"/>	Phone	<input type="text"/>	Clear
c. Contact	<input type="text"/>	Email	<input type="text"/>	Phone	<input type="text"/>	Clear
d. Contact	<input type="text"/>	Email	<input type="text"/>	Phone	<input type="text"/>	Clear

Additional Information



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- Once you have completed all relevant fields on stage two, click the **Next** button to proceed to stage three: **Grants.gov Opportunity Properties**.

In this stage you will specify certain characteristics about your opportunity relevant to Grants.gov.

Complete the following items:

- Select the checkbox for **Grants.gov Relevant?** if this applies to your opportunity.
- Select the checkbox **Publish Synopsis** if this applies to your opportunity.
- Select the checkbox **Publish Application Package** if this applies to your opportunity.
- Click the **Opportunity Category** field and select the appropriate category from the dropdown menu.
- Type comments in the **Opportunity Category Explanation** text field if necessary.
- Confirm the **CFDA Number**, which you selected in stage one, is correct.
- Select **Yes** or **No** in response to the question **Does Opportunity already exist in Grants.gov?**
- Any additional items as required by your agency.

Note: Not all items are visible in the below screenshot.

Create Opportunity

Print Save Close << Previous Next >>

(C) Grants.gov Opportunity Properties

Grants.gov Relevant?

Publish Synopsis

Publish Application Package

* Opportunity Category

Opportunity Category Explanation

* CFDA Number 10.025

* Does Opportunity already exist in Grants.gov? Yes No

Additional Information



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- Once you have completed all relevant items for stage three, click the **Next** button to proceed to stage four: **Attachments**.

Click the **Click Here to Attach Files** link below the **List of Attached Files** table. This will open the **Add Attachment** popup window where you may upload a file from your computer. Click the **OK** button to upload the attachment. Click the **Cancel** button to discard the attachment.

You may only attach one file at a time. Repeat the above procedure to attach all necessary files to your opportunity.

Note: If you wish to remove an attachment after you have uploaded it, click the button in the **Delete?** column in the **List of Attached Files** table.

Create Opportunity USDA-APHIS-10025-PPQFLDOP-16-0015 Print Save Close Cancel Opportunity << Previous Next >>

Status: Draft

Add Attachment ×

Title Other

* Other Attachment Title:

Upload Document From Local Hard Disk: Browse...

OK Cancel

List of Attached Files:

Title	File	Operator	Date/Time	Delete?
No attachments				

[Click Here to Attach Files](#)



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- Once you have attached all relevant files, click the **Next** button to proceed to the final stage of opportunity creation: **Criteria**.

If your opportunity requires applications to pass through the Application Review Process, click the **Peer Review Relevant?** checkbox.

Create Opportunity USDA-APHIS-10025-PPQFLDOP-16-0015 Print Save Publish Close Cancel Opportunity << Previous

Status: Draft

1 — 2 — 3 — 4 — 5

(A) Summary Information of Funding Opportunity Announcement (B) Full Text of Announcement (C) Grants.gov Opportunity Properties (D) Attachments (E) Criteria

(E) Criteria

Peer Review Relevant?

* Reviewer Instructions

1000 characters until maximum length is reached

- If your opportunity is peer review relevant, complete the additional fields as necessary to provide reviewer instructions, and establish review criteria, scoring scales, and score weights.

Create Opportunity USDA-APHIS-10025-PPQFLDOP-16-0015 Print Save Publish Close Cancel Opportunity << Previous

1996 characters until maximum length is reached

Scale Definition

Score Range	Rating	Description
90-100	Excellent	No deficiencies Test
		980 characters until maximum length is reached
80-89	Very good	Slight deficiencies
		981 characters until maximum length is reached
70-79	Good	Minor deficiencies
		982 characters until maximum length is reached
		Several deficiencies



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11. Once you have completed all applicable items on each of the five stages, you may either save or publish your opportunity.

An opportunity ID number will be assigned to your opportunity once it is saved or published. This number appears at the top of the **Create Opportunity** screen. You may wish to document this number for future reference.

You may save your opportunity by clicking the **Save** button. Saving your opportunity retains it in **Draft** status so that you may continue to make changes before publishing the opportunity.

You may publish your opportunity by clicking the **Publish** button. Changes may still be made after an opportunity is published, but this requires withdrawing the published opportunity and republishing it. This is covered in the following section on managing opportunities.

The screenshot shows a web interface for managing opportunities. At the top left, the opportunity ID "16-0015" is displayed. To its right is a row of six green buttons: "Print", "Save", "Publish", "Close", "Cancel Opportunity", and "<< Previous". The "Save" and "Publish" buttons are enclosed in a red rectangular box. Below the buttons is a large text input field. At the bottom of the form, there is a section labeled "Description".



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Managing Opportunities

There are two primary actions involved with managing opportunities: editing and cancelling. The following section describes how to complete these actions for both published and draft opportunities.

Withdrawing a Published Opportunity

Editing or cancelling published opportunities requires first recalling the published opportunity. The following procedure describes how to recall a published opportunity in order to edit or cancel it.

1. To begin, access the **ezFedGrants External Portal Home** screen, click the **Opportunities** tile, and click **Search Opportunities** to open the **Search Opportunities** screen.

Title	User Type	Last Updated	Edit	Delete
New ezFedGrants Functionality (12/01/2016)	Both	11/15/16 7:09 PM	Edit	Delete
System Updates (10/01/2016)	Both	11/15/16 7:07 PM	Edit	Delete

2. On the **Search Opportunities** screen, enter information about your opportunity into at least one of the available **Search Criteria** fields and click the **Search** button.

Search Opportunities Close

Search Criteria

Funding Opportunity Number

Funding Opportunity Title

Application Availability End Date -

CFDA Number

Created by

Program ID

Status



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3. Locate the opportunity you would like to edit in the **Search Results** table and click the relevant link in the **Funding Opportunity Number** column.

Note: The available opportunities may be limited based on your user role and/or the programs you are associated with in the ezFedGrants System.

Search Opportunities
Close

Search Criteria

Funding Opportunity Number	<input type="text"/>	Created by	<input type="text"/>
Funding Opportunity Title	<input type="text"/>	Program ID	<input type="text"/>
Application Availability End Date	<input type="text"/> - <input type="text"/>	Status	<input type="text" value="Published"/>
CFDA Number	<input type="text"/>		

Search
Clear

Search Results

Export 41 Results Found

Funding Opportunity Number	Funding Opportunity Title	Created By	Status	Application Availability End Date	CFDA Number
USDA-APHIS--PPQCPHST-16-001	test	Walter Reid	Published	8/1/2017	10.028
USDA-APHIS-10-PPQCPHST-16-001	National Veterinary Accreditation Pr	Walter Reid	Published	8/22/2018	10
USDA-APHIS-10025-ACXXXXXX-16-004	Keith APHIS Opportunity - 02	Rita Skeeter	Published	7/1/2017	10.025
USDA-APHIS-10025-ACXXXXXX-16-005	Opportunity Screen APHIS Specific V	Rita Skeeter	Published	7/18/2017	10.025
USDA-APHIS-10025-ACXXXXXX-16-006	224	Rita Skeeter	Published	7/18/2017	10.025



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- Once you click the **Funding Opportunity Number** link in the **Search Results** table, the **Opportunity** screen will open.

To withdraw the opportunity and enable modification: Click the **Please select an option** field in the **DECISION** section, select the **Edit** option from the dropdown menu, and click the **Submit** button.

To cancel the opportunity: Click the **Please select an option** field in the **DECISION** section, select the **Cancel** option from the dropdown menu, and click the **Submit** button.

Note: The **Submit** button will appear after you have selected an option from the dropdown menu.

Opportunity (USDA-APHIS-10025-PPQFLDOP-16-0015) Retrieve Grants Gov Applications Print Close

Status: Published

DECISION:

Please select an option ▼

Summary Information | Full Text of Announcement | Grants.gov Opportunity Properties | Attachments | Criteria

(A) Summary Information of Funding Opportunity Announcement

Basic Opportunity Setup

Federal Agency Name:



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Modifying or Canceling an Opportunity

If your opportunity was saved in a draft status or you have recalled it from published status, use the following procedure to edit or cancel an opportunity.

1. To begin, access the **ezFedGrants External Portal Home** screen and click the **Pending Opportunities** tile in the body of the screen.

The **Pending Opportunities for Last 90 Days** popup window will appear. Locate the opportunity you wish to modify in the table and click the **Opportunity ID** link.

Note: Click the **View All Pending Opportunities** link at the bottom of the popup window to view opportunities pending longer than 90 days.

The screenshot displays the ezFedGrants External Portal Home screen. The interface includes a green header with the USDA logo and the text 'ezFedGrants'. A left sidebar contains navigation links: Home, Worklist, Applications, Opportunities, Agreements, Claims, and Reports. The main content area shows a 'Home' tab and two summary tiles: '38 Pending Opportunities' (highlighted with a red box) and '33 Pending Applications'. Below these is a 'News and Notes' section with a 'New Post' button and a 'Title' input field.



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- Once you have clicked the **Opportunity ID** link, the **Create Opportunity** screen will open.

To cancel the opportunity: Click the **Cancel Opportunity** button in the top right corner.

To edit the opportunity: Use the **Next** and **Previous** buttons to navigate between the five stages of opportunity creation and make any necessary modifications.

Once you have made all necessary changes, you may either save or publish your opportunity.

Click the **Save** button to simply save your opportunity. The opportunity will remain in an editable status.

If you are ready to publish, or republish, your opportunity, advance to stage five of the **Create Opportunity** screen, and click the **Publish** button.

Create Opportunity USDA-APHIS-10025-PPQFLDOP-16-0015 Print Save Close Cancel Opportunity Next >>

Status: Pending Modification

1 (A) Summary Information of Funding Opportunity Announcement 2 (B) Full Text of Announcement 3 (C) Grants.gov Opportunity Properties 4 (D) Attachments 5 (E) Criteria

(A) Summary Information of Funding Opportunity Announcement

Basic Opportunity Setup

Federal Agency Name	Animal and Plant Health Inspection Service
* Funding Opportunity Title	Test Opportunity - Opportunity Job Aid
* Announcement Type	Modification of a previously announced opportunity
* Purpose of Modification	



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Comments

Additional Materials

Refer to the following additional materials:

- ezFedGrants External Portal Overview and Navigation for Internal Users Job Aid
- ezFedGrants Program Creation Job Aid
- ezFedGrants Manual Application Retrieval Job Aid
- ezFedGrants Application Approval Process for Internal Users Job Aid
- ezFedGrants Panel Creation and Management Job Aid

Version Control

Name	Date	Changes Made
April Murphy	2/16/2017	Initial Document Created
April Murphy	3/2/2017	Added more detail to Step 8 of Creating Opportunities. Corrected subsection headings of Procedure section and added contents summary to Purpose section. Generally clarified information throughout Clarified 508 alt text for some images.