Program Managers Guide to ezFedGrants

Program Managers Guide to ezFedGrants Table of Contents

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Introduction

This document is designed to be a guide for basic actions to be taken by the Program Manager in ezFedGrants and is not intended to be a comprehensive document covering all possible situations. Additional detail on any of these actions is available through the work aids on the ASC and NFC ezFedGrants websites which were the source material for this document. The descriptions in this work aid will only show the process of moving the action forward in the workflow.

The Table of Contents functions much like an index. To use it, find the action to be taken and using your curser, click on that action. This will direct you to the page describing the steps for the action. The action being described will be stated in a step-by-step narrative description and paired with a red arrow showing the point of action on the screen shots.

Application Review

Application Review is the initial step in the Program Manager's (PM) actions within ezFedGrants (eFG) on a cooperator's Application against a Funding Opportunity. Currently, the overall process from initial application review to final agreement award requires a minimum of two separate actions (Application Review and Application Approval) on the predominately green colored External (Pega) portal and one action (Agreement Approval) on the predominately blue colored Internal (CRM) portal.

Notification of the need for a PM to take any of these actions will start with a system generated email. The emails indicating action in the External Portal will have a hyperlink to the eFG user home screen. Emails for action in the Internal Portal will not, but do specifically say the action should be taken in the Internal Portal.

Navigate through the FMMI site as shown in the following steps, or click on the **<u>ezFedGrants</u>** hyperlink, as indicated below, to go to the external portal.

and compare and a second a second
Tue 6/20/2017 1:38 PM
USDA External Portal Workflow System <wf-batch@fms.usda.gov></wf-batch@fms.usda.gov>
Application APP-1570 Pending Review
To Cooperband, Miriam F - APHIS
An Application is ready for your review. Application Details: - Application ID: APP-1570 - Funding Opportunity Title: FY17 Attractants for Lycorma delicatula, Spotted Lanternfly - Funding Opportunity ID: USDA- MHIS-10025-PPQS&T00-17-0066 - Organization Name: PENNSYEVANIA STATE UNIVERSITY, THE PENN STATE - Authorized Representative: - Period of Performance Proposed Start Date: 7/1/17 - Period of Performance Proposed End Date: 6/30/18 - CFDA#: 10.021 ezFedGrants
Thank you.

The link will take you to your FMMI Home Page. Click on the Grantor Management tab.



This is a United States Department of Agriculture computer system, which may be accessed and used only for official Government business (or as otherwise permitted by regulation) by subject violators to criminal, civil, and/or administrative action. All information on this computer system may be intercepted, recorded, read, copied, and disclosed by and to authorized p computer system by any person, where authorized or unauthorized, constitutes consent to those terms.

Click on the **arrow** next to the **Grants Agreements Management folder**.

·	
United States Departm	ent of Agriculture ement Modernization Initiative
Welcome Grantor Man	agement
Grants and Agreements	
Grants and Agreements M	Nanagement
	4
B ^r isiness Activity	
Grants and Agreements	
Management	
myPortal Favorites	

Click on Grants and Agreements Management External Portal.

United States Departr Financial Manag	nent of Agriculture Jement Modernization Initiative
Welcome Grantor Ma	nag ment
Grants and Agreements	
Grants and Agreements	Minagement ∢
Business Activity	
 	
myPortal Favorites	

The external portal will open. Click the <u>Pending Applications</u> tile to open a new window listing **Pending Applications** submitted within 90 days.

ezFedGra	ints				💄 Rita Skeeter
	Home				
	22	12	0	5	5
Applications	Pending Opportunities	Pending Applications	Pending Amendments	Pending Claims	Pending Reports
Claims	News and Note	S		122456	Next
	Title		Use	r Type Last Updated V	IVEAL
	Test		Boti	h 8/3/16 2:11 PM	Edit Delete
			Inte	rnal 7/27/16 11:11 A	M Edit Delete
	Test Both		Bot	h 7/25/16 1:12 PM	Edit Delete
	Test External		Exte	ernal 7/25/16 1:12 PM	Edit Delete
	Test Internal		Inte	rnal 7/25/16 1:12 PM	Edit Delete

The **Pending Applications for Past 90 Days** window will open. Click the **Application ID** to open the application you wish to review.

	Home						
	0		1		0		0
	Pending Opportu	nities	Pending Applications	Pending Amendments	Pending	Claims	Pending Repo
	News and No	Pending A	pplications for Park 90 Days				×
Chatters	Title						Last
	Title No items	Applicat	ion lug unding Opportunity Number	Funding Opportunity Title		Status	Updated
	No items	Applicat	unding Opportunity Number	Funding Opportunity Title FY17 Attractants for Lycorma delicatula, S	potted Lanternfly	Status Accepted/Recommended	Updated 6/21/17
	Title No items	Applicat APP-157 View All 1	ion is a unding Opportunity Number 0 USOA-APHIS-10025-PPQS&T00-17-0066 Pending Applications	Funding Opportunity Title FY17 Attractants for Lycorma delicatula. S	potted Lanternfly	Status Accepted/Recommended	Updated 6/21/17

Clicking the **Funding Opportunity Number** opens the opportunity the application is applying against in read only mode. To continue evaluating the Application you will have to click on the **Application ID** again.

Clicking the **Application ID** opens a new tab with the application information. From this screen, **tabs** allow review of application details and attachments.

USDA ezFedGr	antsOSEC 0SEC.ST-GL.Pr
	Home APP-4058
	Status: Submitted
My Agreements	
	DECISION:
	Please select an option .*
	APPLICATION SF-424 SF-424A Partners Additional Details Attachments Comments
	Application for Federal Assistance SF-424
	 1. Type of Submission: Preapplication Application Changed/Corrected Application Revision Revision
둘 UITree _{개ff}	* 3. Date Received: 10/10/2016

After reviewing the materials click the Decision section <u>Please Select an Option</u> dropdown box, to choose the appropriate action.

ezFedGra	nts
	Home App-1570 ×
	Application (APP-1570)
	Status: Submitted
	DECISION:
	Please select an option 💌
	APPLICATION
	SF-424 SF-424A Partners Additional Details Attachments
	Application for Federal Assistance SF-424
	* 1 Tune of Application * 2 Tune of Now

If the application is acceptable, click Accept.

USDA ezFedGra	ts
	Home App-1570 ×
	Application (APP-1570)
	Status: Submitted
	DECISION:
	Please select an option of Accept
	Not Accept Return
	Cancel
	APPLICATION
	SF-424 SF-424A Partners Additional Details Attachments
	Application for Federal Assistance SF-424
	* 1. Type of Application * 2. Type of New If Revision Submission: Application:
	Not Accent is used to when a legitimate application has been submitted, but it
	does not pass review for awarding. This option will rarely be used by PPO.

- **Return** sends the application back to the applicant for editing.
- **Cancel** does not reject the application but does void it. Cancel is the appropriate action for removing a duplicate application.

The **Submit** button will appear after selecting one of the decision options. Click **<u>Submit</u>** to finalize your decision.

USDA ezFedGra	nts
	Home APP-1570 [×]
	Application (APP-1570)
	Status: Accepted/Recommended
	DECISION:
	Please select an option V Submit
	Approve
	Please Click Submit to Approve Application

Successful Acceptance changes the Status to **<u>Grant Review</u>** and will generate a **<u>confirmation banner</u>** indicating that the application has been successfully accepted.

USDA ez	FedGrants
	Home App-1570 X
Home	Application (APP-1570
Worklist	Status: Grant Review
Applications	
Opportunities	Application APP-1570 has been successfully accepted.
Agreements	
Claims	APPLICATION
Reports	SF-424 SF-424A Partners Additional Details Attachments
	Application for Federal Assistance SF-424
	* 1. Type of Application * 2. Type of New If Revision Submission: Application:
	* 3. Date Received: 4. Applicant Identifier:

At this point the work flow has moved the application to the AS for review. It will no longer be in your pending applications list until the AS has completed the review. Once the AS has reviewed the application you will receive another email notification indicating the same application is available for approval.

PROGRAM MANAGER APPLICATION APPROVAL PROCESS

The PM will receive a notification from the eFG system similar to the one below indicating there is an application Pending Preview.



Click the **<u>ezFedGrants</u>** link provided for your convenience. This will open the eAuth login page for FMMI shown below.

USDA Ustrate States Departme	ert of Agriculture htication		^
Fogin : Passinger -			
	Home About eAuthents	cation Help Contact Us Find an LRA	
Quick Links	You are here: eAuthentication Home > eAuthentication	Login	
 What is an account? Create an account 	eAuthentication Login	1	
* Update your account	LincPass (PIV) ?	User ID & Password ?	
Administrator Links F. Load Registration Authority Login		User ID: Password:	
	LincPass (PIV)	I forgot my User ID Password REGISTER LOGIN	
		Change my Password	
	WAR	NING	
	Upon Login You Agree to the Follo	wing Information:	
	 You are accessing a U.S. Government infi computer, (2) this computer network, (3) (4) all devices and storage media attache network. This information system is provi 	ormation system, which includes (1) this all computers connected to this network, and do this network or to a computer on this ded for U.S. Government-authorized use only.	
	Unauthorized or improper use of this syst	em may result in disciplinary action, as well as	
	civil and criminal penalties.		
	 By using this information system, you un 	derstand and consent to the following:	
	 You have no reasonable expecta data transiting or stored on this may for any lawful government communication or data transiting 	tion of privacy regarding any communications or information system. At any time, the government purpose monitor, intercept, search and seize any g or stored on this information system.	
	 Any communications or data transition be disclosed or used for any law 	nsiting or stored on this information system may ful government purpose.	
	 Your consent is final and irrevool informal policies purporting to pregarding communications on this supervisor or any other official, it 	able. You may not rely on any statements or rovide you with any expectation of privacy is system, whether oral or written, by your except USDA's Chief Information Officer.	
	a.a. a. a. 1. 1. 1. 1. 1.		100% *

Once logged in, your FMMI home page will be displayed. Click on the Grantor Management tab.



This will add the dropdown menu to the left side of the page. To further expand this menu click on the small **<u>arrow</u>** next to the added link.



Clicking this arrow will expand the dropdown choices and provide you with a link to the external portal. Click the link that says **Grants and Agreements Management External Portal**.



This will direct you to the external portal. Click on the tile titled **Pending Applications**.

USDA ezFedGr	ants				🔔 Miriam Cooperband
	Home O Pending Opportunities	1 Pending Applications	O Pending Amendments	O Pending Claims	O Pending Reports
	News and Notes				Last Updated
	Noiterns				

A popup box will appear with all pending application. Click on the **<u>Application ID Number</u>** for the application to be approved.

USDA ezFedGra	ints					👤 Miriam Cooperban
	Home	1	0	0		0
	Pending Opportunities	Pending Applications	Pending Amendments	Pending Claims		Pending Reports
	News and Notes	Pending Applications for Past 90 Days				×
	No items	Application ID Funding Opportunity Nu APP-1570 USDA-APHIS-10025-PPC	Funding Opportunity Title QS&T00-17-0066 FY17 Attractants for Lycor	۳ ma delicatula, Spotted Lanternfly	Status Last Updated Submitted 6/20/17	
		View All Pending Applications				<i>"</i>

One may click on the Funding Opportunity Number and review the opportunity that the application has been submitted against. If you chose to do this, you must return to the pending applications and select the application to take action.

Upon clicking the Application ID number the application will be displayed. You may use the **<u>tabs</u>** under the Decision box to review the different documents submitted with the application. Once you have reviewed the application click on the dropdown **<u>arrow</u>** in the green *Please select an option* button located in the Decision box.

ezFedGra		1 Miriam Cooperband
	Application (APP-1570)	Close
	Status: ubmitted	^
	DECISION:	
	Please select an option '*	
	APPLICATION SF-424 SF-424A Partners Additional Details Attachments Application for Federal Assistance SF-424	
	 1. Type of Application 2. Type of New If Revision, select appropriate letter(s): Submission: 	
	3. Date Received: 6/20/2017	

Clicking on the dropdown will provide several choices. To move the application forward in the work flow select **<u>Approve</u>**.

ezFedGra	ants a	
	Home App-1570 [%]	
Home	Application (APP-1570)	Close
Worklist		
Applications	Status: Accepted/Recommended	^
Claims	DECISION:	
Reports	Please be 'g an option 'v	
Panels	Not Approve Cancel	
	APPLICATION	
	SF-424 SF-424A Partners Additional Details Attachments	
	Application for Federal Assistance SF-424	
	* 1. Type of Application * 2. Type of New If Revision, select appropriate letter(s): Submission: Application	

Once you have selected your decision, note the addition of the Submit button to the page. Click on the **<u>Submit</u>** button.

	ants	L Mirlam Cooperband
Home	Application (APP-1570)	Cose
	Statur Submitted	
	DECISION: Prese solect an option * Suburie	
	Accept Please Click Submit to Accept Application	
	APPLICATION	
	SF-424 SF-424A Partners Additional Details Attachments Application for Federal Assistance SF-424	

Some find it confusing to note from the beginning of this process that the Status has indicated *Submitted*. This is a reference to the application being submitted to the Program Manager by the cooperator. By pushing the Submit button you are *approving* the application and sending it forward in the work flow to the Agreements Specialist as a draft award.

Once you have selected "Approve" and submitted as shown on the top of page 5 you will note that the Status has changed and now states **Approved** and the **banner** states the application has been successfully approved.

USDA ezFedGra	ints	1 Miriam Cooperband
	Home App.1570	Class A
	Application (APP-1570)	
		_
	Application APP-1570 has been successfully approved.	
	SAP CRM Grantor	
	APPLICATION SF-424 SF-424A Partners Additional Details Attachments Application for Federal Assistance SF-424 SF-424 SF-424A SF-424A	
	* 1. Type of Application * 2. Type of New If Revision, select appropriate letter(s). Submission: Application:	
	3. Date Received: 6/20/2017 4. Applicant Identifier:	
	Sa. Federal Entity Identifier: Sb. Federal Award Identifier:	€ 100% ▼

Once you have approved the application you will receive a copy of a system generated email to your cooperator similar to the one below indicating that the application has been approved and the process of generating the award has begun.



The workflow will now provide a draft award document to the agreement specialist for review. You next action for processing this agreement will be the approval of the award document in the internal system.

Award Document Approval

Note: The same procedure is used for APPROVING AN AMENDMENT

Once the agreement specialist has reviewed and edited the award document as necessary the document will be marked as Draft Finalized and will move through the work flow to the Program Manager. You will once again receive a notification from the system similar to the one below, indicating that your agreement has been **routed for approval**. Note that the email indicates that your actions will be in the **internal portal**.



Unfortunately this notification does not supply a link to your FMMI home page as previous emails. You can use the following URL to access your FMMI home page: https://portal.fms.usda.gov You may want to bookmark this page.

Access the internal portal through your FMMI home page using the URL in the information box above.

This will open the eAuth login page for FMMI shown below.



Once logged in, your FMMI home page will be displayed. Click on the **<u>Grantor Management</u>** tab.



This will add the dropdown menu to the left side of the page. To further expand this menu click on the small **arrow** next to the added link.



Clicking this arrow will expand the dropdown choices and provide you with a link to the external portal. Click the link that says **<u>Grants and Agreements Management System</u>**.

United States Department of Agriculture Financial Management Modernization initiative	Welcome Miriam Cooperbane	d Help ∣Log off
Welcome Grantor Management		
Grants and Agreements		
Grants and Agreements Management System	History	Back Forward
Business Activity		
✓ Listants and Agreements		
Grants and Agreements		
Management System Oran And Antennaka Management External Portal		
Create 📃 🗖		
myPortal Favorites 📑 🗖		
There are no items to display		

This will bring you to your internal portal dashboard. You will note one of the three banners is titled Workflow Tasks. **<u>Click</u>** on the item you wish to work on.

Grants Manage	I ment System Program Manager			
				Saved Searches * My Agreements * Go Advanced
and the second	Home			🖸 Back 🗾 🗧
				्र (1) 🧠 🗋
Home				
Worklist	Workflow Tasks	E ×	Create	≝ ×
Agreements >	Action Required: Agmt 6000001270 Routed for Approval	Carrier Control of Carrier		
Amendments +				
Claims +	Search	X		
Activities •	Activities			
Recipients & Contacts +	Agreements			
Closeouts +	Claims			
Recent Items	Programs		J	
RC. REGENTS OF				
GN: Akit Eskalon 1				

The resulting screen will provide you with a decision box and description of the agreement. Note the decision dropdown box defaults to **Approve**. If you wish to approve the award document click the **Execute Decision** box.

	II Hello, Miriam Cooperband	Personalize System News
	sinch system – – –	Saved Searches - My Agreements - Go Advanced 🗃
	Home	💽 Back 🔻 💟 👻
	✓ Back Reserve Forward	4 B
Home	Decision: Approve Execute Decision	
Worklist	▼ Workflow Task	
Agreements >	Subject Action Required: Aprt 6000001270, Routed for Approval	Status Ready
Amendments >	Sent Date 06/22/2017	otatus needy
Claims +	Due Date 06/26/2017	
Activities +	Description	
Recipients & Contacts >	The above mentioned accelement is ready for your review and action	
Closeouts +	The above menuored agreement is ready for your review and action.	
Recent Items AG: 6000000668 Fi., RC: REGENTS OF., CN: Akif Eskalen 1.,	Delow are some details pertinent to the agreement: -Agreement ID: 6000001270 FAIN: -CPDA Humber: 10.925 -Authority: 7 USC 7701-7772 -Priod of Performance Start Date: 07/01/2017 -Priod Time: FY11 Attends for Lycoma delicatula, -Project Title FY11 Attends for Lycoma delicatula, -Desc. Title of Applicant's Project Autocatants for Lycorma delicatula, Spotted Lanternfly -Obligation Amount: 93.000.00 -Recipient: PENNSYLVANIA STATE UNIVERSITY, THE PENN STATE -Grants Spocialist CLARK PHILLIPS -Program Manager: Miriam Cooperband -Notes: Thank vou.	v
	Associated Business Objects	
	Description 600001270_EV17 Attractants for Lycome delicatul	Type Workflow Object
	000001270*** FT7 Auracianis in Eyconna dencaur	
		1 = q =
	No result found	

If you wish to execute a decision other than Approve, click on the dropdown arrow and select the appropriate decision.

Once you have approved the award document you will be returned to your internal portal dashboard. Note that the item approved is no longer in your **Workflow Task tile**.

USDA USDA FN	AMI Hello, Miriam Cooperband	Personalize System News
		Saved Searches * My Agreements * Go Advanced
Silling and	Home	🖸 Back * 🖸 *
		💉 (1) 🖏 🖨
Home		
Worklist	Workflow Tasks	∃ x Create
Agreements	No result found	
Amendments		
Claims	* Search max	1 ×
Activities	Activities	
Recipients & Contacts	Agreements Amontments	
Closeouts	Claims	
Recent Items AG: 600000668 Fi RC: REGENTS OF CN: Akif Eskalen 1	Cosecute Programs	

The award document has been approved and the work flow has now forwarded the award document to the signatory official(s) of your cooperator.

As a Program Manager this will conclude your final action in processing the agreement. The next notification you will receive in reference to this award will be the award has been entered into the financial system and is in an Active status.

Program Manager Claims for Reimbursement (SF-270) Review & Approval

The following outlines the procedure for handling SF-270 Reimbursement Requests submitted through eFG. Currently, Advance Payment Requests, which require justification information, cannot be submitted through the eFG system and must be processed manually.

The PM activities on claims for reimbursement is currently composed of two actions SF-270 Review and Approval on the External Portal and Claim Reimbursement Payment Approval on the Internal Portal.

- The agreement the claim is submitted against must be in **Active** status.
- All prior claims on the same agreement must have been fully approved and paid.
- There cannot be any past due or open performance (SF-PPR) or financial (SF-425) reports for the agreement the claim is against.

The PM will receive notification by a system generated email that action on a claim is needed. It should appear similar to the one below. Either click on the <u>ezFedGrants</u> hyperlink to get to the user home screen or navigate through the FMMI site.



Note that the **External Portal** is indicated on the notification email.

Navigate to the External Portal through FMMI by clicking on Grants and Agreements Management External Portal.

United States Department of Agriculture Financial Management Modernization Initiative	
Welcome Grantor Management	
Grants and Agreements	
Grants and Agreements Management	
Business Activity	
▼ □ Grants and Agreements	
Management	
Grants and Agreements	
Management System	
Grants and Agreements	
Management External Portal	
myPortal Favorites	

Click on Pending Claims tile.

USDA ezFedGrz	ants				💄 Jason Watkins
	lome	0	0	4	0
Applications Opportunities	Pending Opportunities	Pending Applications	Pending Amendments	Pending Claims	Pending Reports
Agreements Claims	News and Notes				
	Title No items				Lest Updated
	5				

The **Pending Claims for the Past 90 Days** window opens. Click the **<u>Claim ID</u>** for the claim you wish to address.

nding Claims for	Past	90 Days				
Claim ID	-	FAIN	• Agreement Title	• Status	Last Updated	1
APHIS-CLM-117		AP1612 APACXG034	Samantha 3159 30 Days APHIS 4	Submitted	8/8/16	
APHIS-CLM-59		AP1612-APACX007	Calvin Workflow >150	Pending Acceptance	7/13/16	
CLM-675		AP16PPQFLDOPC004	National Clean Plant Network (NC	Submitted	8/24/16	
CLM-688		AP1612-APACXG036	TR_Agreement_1	Submitted	8/24/16	

View All Pending Claims

This opens the claim screen for that claim. Review claim document information by using the provided <u>tabs</u> below the Decision box. After review select the green <u>Please Select an Option</u> dropdown box.

ezFedGra	nts
	Home CLM-740 ¹⁴
	Claim (CLM-740)
	Status Submitted
	Status: Submitted
	DECISION:
	Please select an option of
	Accept
	Return
	Amend Budget
	SF-270 Signature Attachments
	OMB APPROVAL No.: 0348-0004
	a. "X" one or both boxes

Click <u>Accept</u> to accept the claim for immediate processing.

Opportuniti s Agreements	Status: Submitted
Claims Reports	DECISION:
Panels	Accept Not Accept Return Amend Budget
	SF-270 Signature Attachments

- Not Accept voids the claim submission.
- **Return** sends the claim back to the applicant for corrections.
- Amend Budget accepts the claim but delays processing until the agreement budget has been amended.

Details and examples of reasons for using the other options can be found on page 5 of the **ezFedGrants External Portal Claim Acceptance and Payment Job Aid** at <u>https://www.aphis.usda.gov/mrpbs/fmd/downloads/ezFedGrants-External-Portal-Claim-Acceptance-and-Payment.pdf</u> After selecting a decision, the Submit button will appear. If required, provide justification for your decision, then click **Submit**.

Home	Claim (CI M-740)
Worklist	
Applications	
Opportunities	status: Submitted
Agreements	
Claims	DECISION:
Reports	Please select an option 🔻 Submit
Panels	Accept
	Please click Submit to accept claim

Successful submission of an Accepted claim will update the **Status**, generate a **confirmation banner**, and generate a **Claim ID**.

ezFedGra	nts
	Home CLM-740 [×]
Home	Claim (CLM-740)
Worklist	
Applications	Status: Accepted for Payment Processing
Opportunities	Status. Accepted for Fayment Processing
Agreements	Your claim CLM-740 is being processed for payment by APHIS.
Claims	
Reports	ß
	SAP CRM Grantor SAP Claim ID: 5000004149

Upon submission in the external portal the workflow will route the claim to the Grant Specialist. Once the Grant Specialist has reviewed and assigned the appropriate accounting information the work flow will move the claim back to the Program Manager. You will receive an email notifying you that the claim is waiting for your approval in the internal portal.

Login to your home page at <u>https://portal.fms.usda.gov</u> .

This will open the eAuth login page for FMMI shown below.



Once logged in, your FMMI home page will be displayed. Click on the **Grantor Management** tab.



This will add the dropdown menu to the left side of the page. To further expand this menu click on the small **<u>arrow</u>** next to the added link.



Clicking this arrow will expand the dropdown choices and provide you with a link to the external portal. Click the link that says **Grants and Agreements Management System**.



This will bring you to your internal portal dashboard. Under the Workflow Tasks tile click on the appropriate task that will be labeled <u>Action Required: Claim</u> (your claim number here) Routed for Approval.

A Minter/monta	Currently preserving Give Control This used annulation (control for the control of the		X Stop Presenting	- o ×
USDA USDA FMP	Program Manager	× L E		Personalize System News
Grants Manag	ment System - Out that Manager		Saved Searches *	Go Advanced
the second	Home			🖸 Back * 🚺 •
THE REAL PROPERTY OF				0.0
Home				
Worklist	Workflow Task	Create		E x
Agreements	Action Required: Claim E00000E409 Revised for Approval			
Amendments	Action Required. Claim 300000406 Rodies for Approval			
Claims	Search	-		
Activities	Activities			
Recipients & Contacts	Agreements			
Closeouts	Amendments Claims Closeouts			
Recent Items	Programs			
WO: Action Requir				
CN: Sandra William				
CN: Dr. Kelly Loftin				
CN: Jonathan Turk				

The claim will appear with the certification statement in the Description. You will note the Decision defaults to Approve. After review, to approve the claim click **Execute Decision**.

USDA USDA	FMMI Hello, Anne-marie Calicott		Personalize System New
Grands	Anngement System	Saved Searches *	Go Advanced
Carlos and	Home		🖸 Back 🔻 🛄
	Back Reserve Forward		61
Home	Decision: Approve Execute Decision		
Norklist	- Workflow Test		
Agreements	Control of the Article Description Concentration and the Article Statement	Change David	
Amendments	Subject Action Required: Claim 5000006408 Routed for Approval	Status Heady	
Claims	Due Date 11/09/2017		
Activities	Description		
Recipients & Conta	1a •		
Closeouts	The above mentioned claim is ready for your review. By selecting Approve, you are in agreement with the statement below:		<u>^</u>
Recent Items	I certify that, to the best of my knowledge, this request for payment		
CN: Sandra Willia CN: Dr: Kelly Loft CN: Jennifer East CN: Jenathan Tu CL: 5000005831	Jeaned activities under this agreement. I have examined and certify that this request is correct to payment. Below are some details pertinent to the Claim:		
	-Grants Specialist: CLARK PHILLIPS -Program Manager Anne-Mano Calcool -Project Tille: PY17 Alabama Grass Sod Treatments for IF -Period of Performance Sato Ibale: 05/15/017 -Period of Performance Sato Date: 12/31/2018 -Vaidi Tre: 09/30/2017 -Vaidi Te: 00/30/2017 -		
	~ Associated Business Objects		
	Description	Туре	
	5000006408FY17 Alabama Grass Sod Treatments for	Workflow Object	
	* Attachments To New Ard Mate		M G & P

Your home page will refresh and you will note that the task will no longer be in your Workflow Task.

	i currently presenting Give Control *	and the second second second		× Stop Presenting	- 5 ×
USDA USDA FMM	III Program Manager	eements Manag	× _ e		Personalize System News
	Home			Saved Searches *	Go Advanced
Home		b			· ♥ (1) ♥ ₩
Worklist	Workflow Tasks		Create		(H. x.)
Agreements +	P No result found				H
Amendments >)		
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Activities +	Activities	(leak (TT)			
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Accepting Reports

Reports are approved in the external portal. Once you have received a notification via email that you have a report to approve, access your external portal via your FMMI home screen.

Click on the Grantor Management tab.





This will expand the links to show both the internal and external portals. Click on the last link, **Grants and Agreements management External Portal**.



Your external portal home screen will appear. Click **<u>Pending Reports</u>** from the tiles across the top of the page.

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This will display a pop up titled Pending Reports for Last 90 Days. From the pop up box select the **Report ID** for the report you wish to approve.

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The screen displayed will depend on the type of report you are approving. Both Accomplishment Reports and Financial Reports are approved in the same manner. In this example, a Financial report is approved.

Note that the Financial Report must be completed using the electronic likeness of the SF 425 – Federal Financial Report in the system. The narrative for the Accomplishment Report may be typed in the provided space in the system or it may be completed as a separate document and attached in the system.

The **banner** at the top of the page will indicate the type of report you are approving and **tabs** below the Decision box will allow you to view reports and attachments.

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Once the report has been review by clicking on the appropriate tab, click on the Please select an option dropdown. You will be given the choice to Accept or Return. Click <u>Accept</u> to approve the report.

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The submit button will appear when you make the selection. Click **<u>Submit</u>** to accept the report.

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The Status of the document will change to <u>Accepted</u> and a <u>banner</u> will appear showing the report has been successfully accepted.

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Closeout of Agreements

The Program Managers responsibilities in the closeout process for agreements is handled entirely outside of ezFedGrants. You will receive closeout documents in the same manner that you have in the past and once they have been completed, you will return them to your system Grants Specialist via the designated avenue outside of the system. It is the GS responsibility to get the closeout reports in ezFedGrants for distribution to the appropriate parties.