Program Managers Guide to ezFedGrants

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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 **ezFedGrants** hyperlink, as indicated below, to go to the external portal.
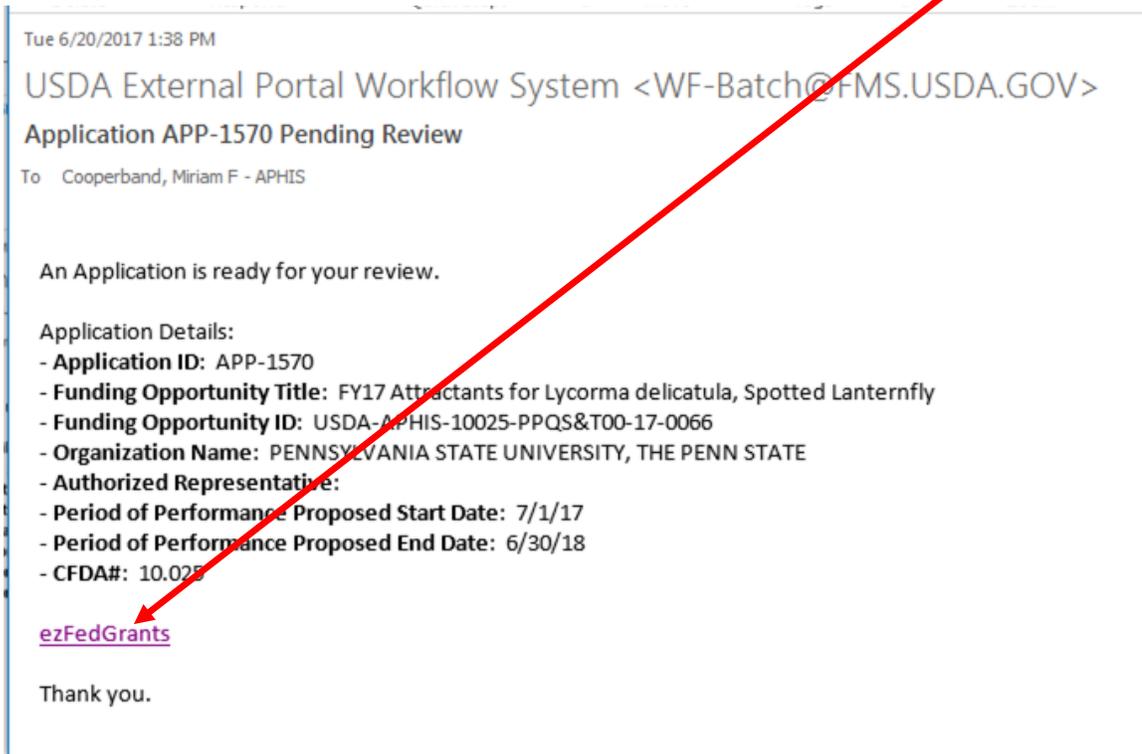
The link will take you to your FMMI Home Page. Click on the **Grantor Management** tab.
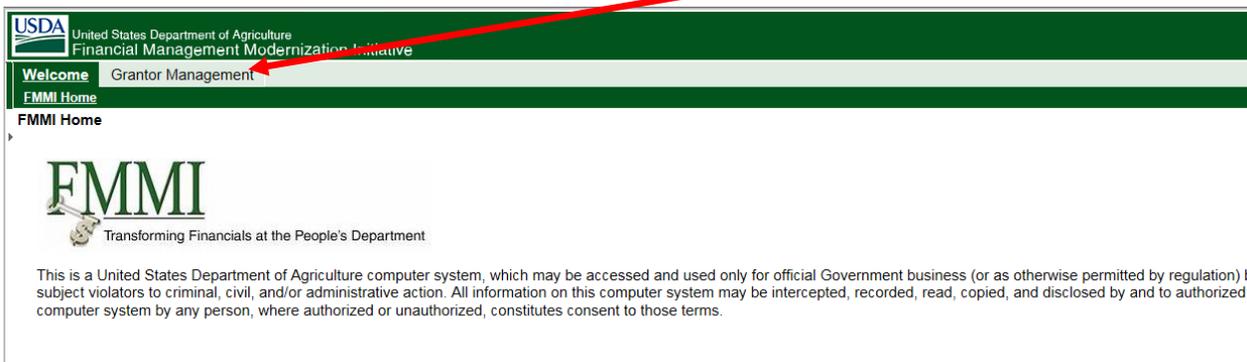
Click on the **arrow** next to the **Grants Agreements Management folder**.

Click on **Grants and Agreements Management External Portal**.
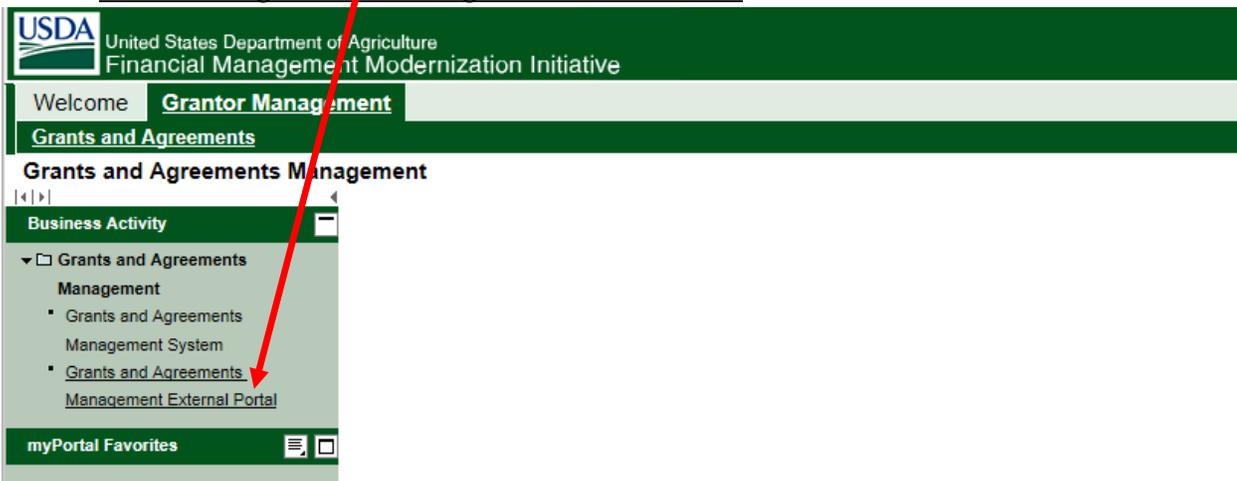
The external portal will open. Click the **Pending Applications** tile to open a new window listing **Pending Applications** submitted within 90 days.
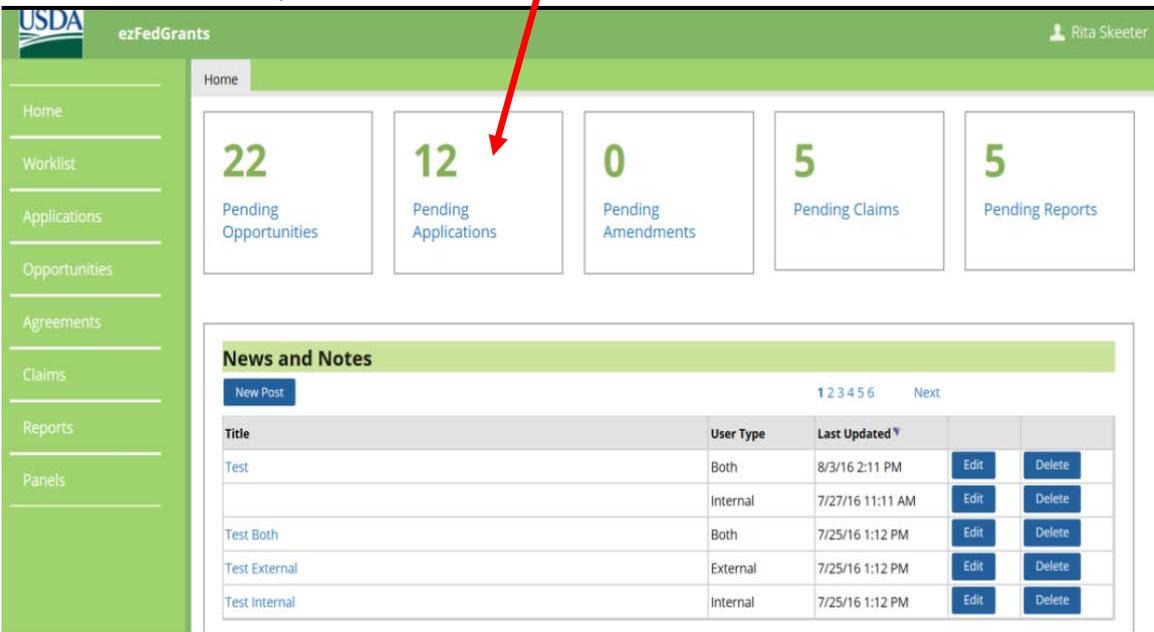
The **Pending Applications for Past 90 Days** window will open. Click the **Application ID** to open the application you wish to review.
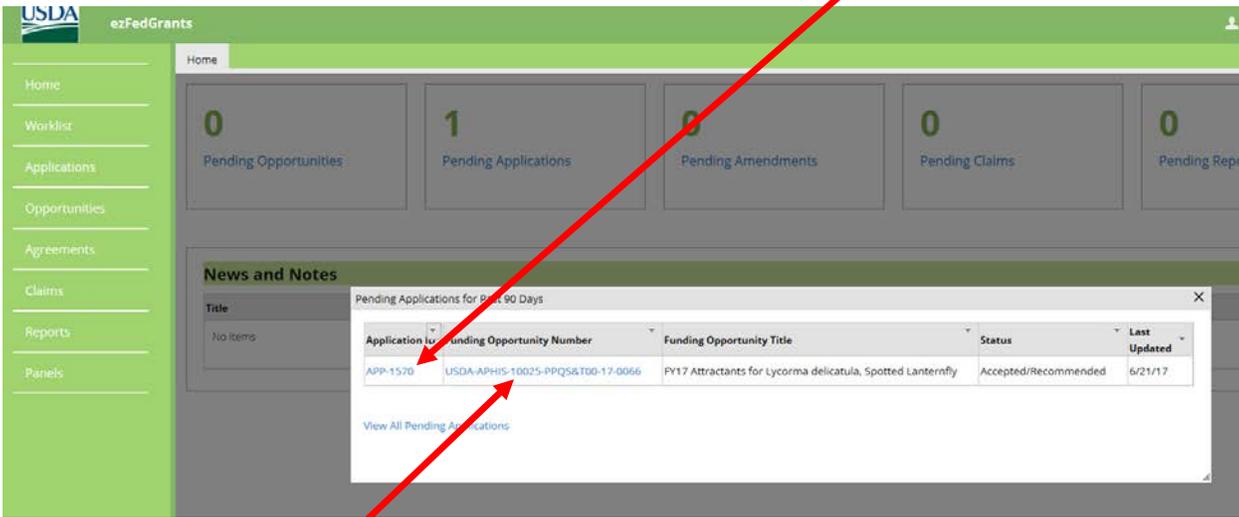
Clicking the **Funding Opportunity Number** opens the opportunity the application is applying against in read only mode. To continue evaluating the Application you will have to click on the **Application ID** again.

Clicking the **Application ID** opens a new tab with the application information. From this screen, **tabs** allow review of application details and attachments.
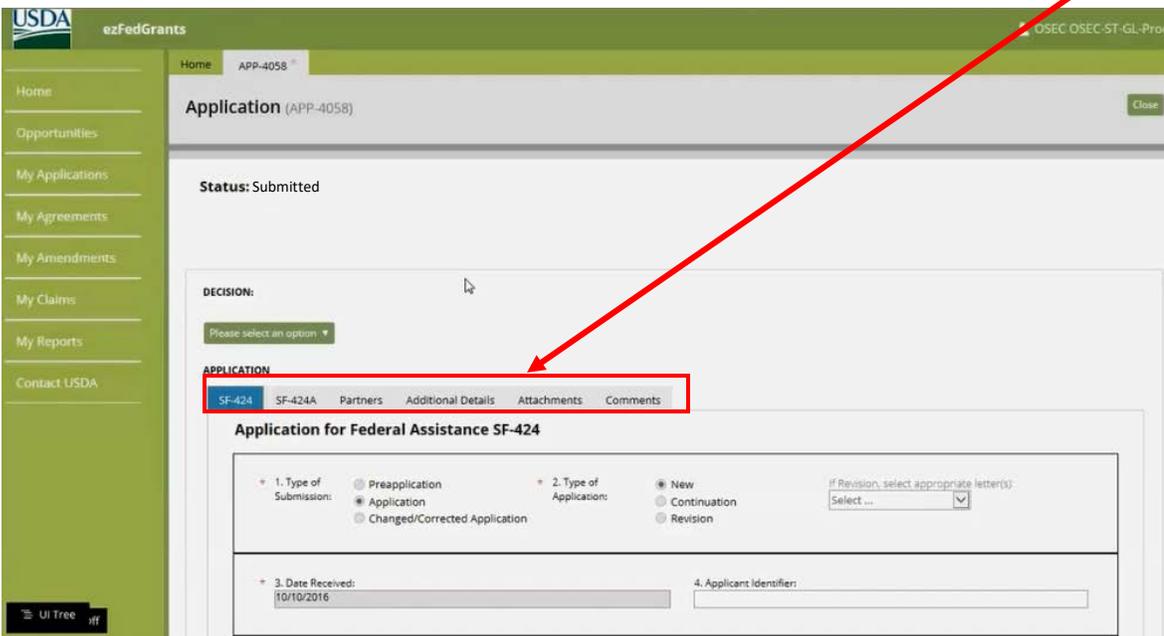
After reviewing the materials click the Decision section **Please Select an Option** dropdown box, to choose the appropriate action.
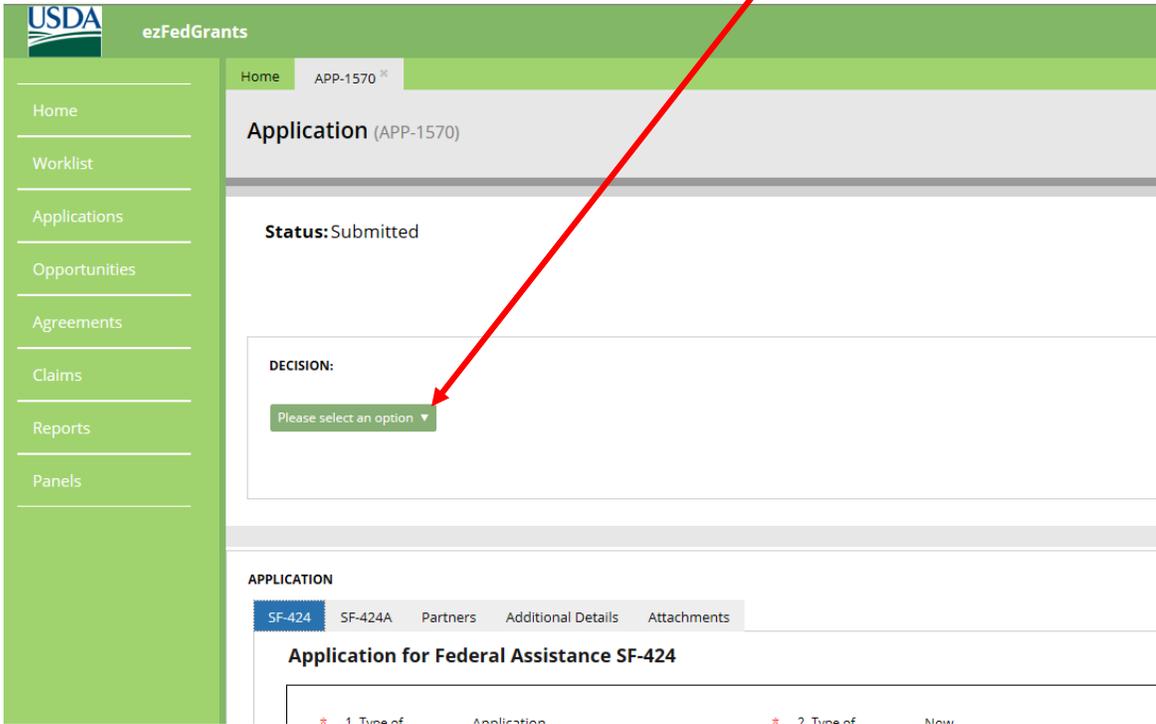
If the application is acceptable, click **Accept**.
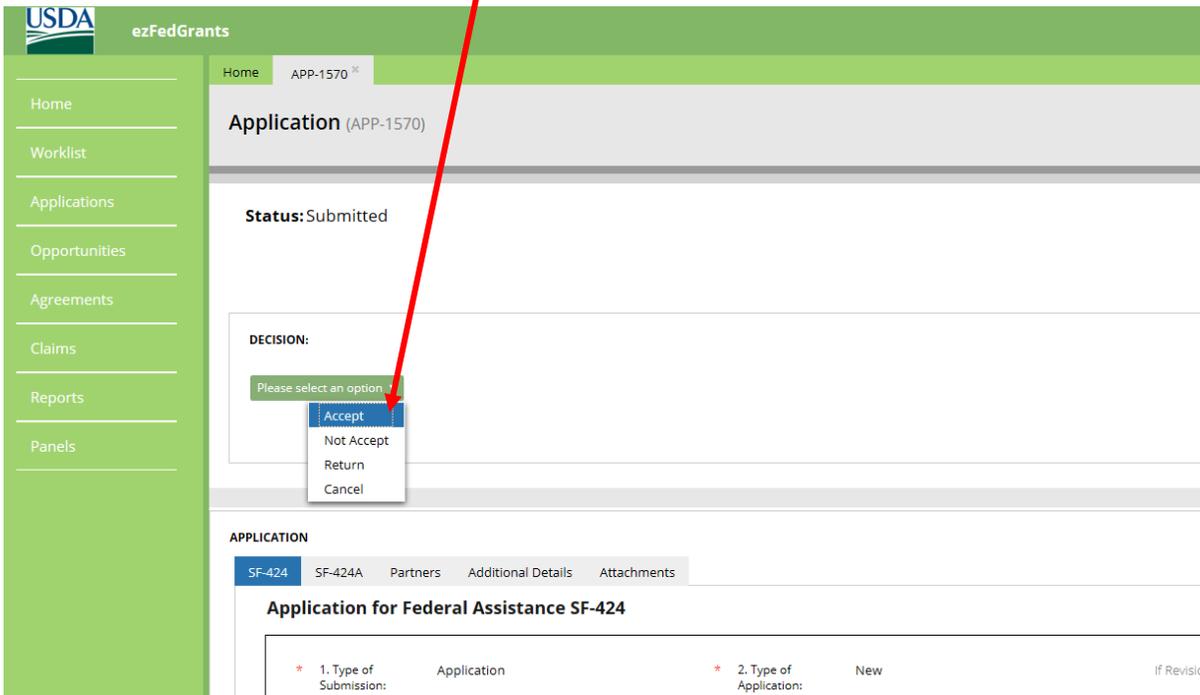
- **Not Accept** is used to when a legitimate application has been submitted, but it does not pass review for awarding. This option will rarely be used by PPQ.
- **Return** sends the application back to the applicant for editing.
- **Cancel** does not reject the application but does void it. Cancel is the appropriate action for removing a duplicate application.

The **Submit** button will appear after selecting one of the decision options. Click **Submit** to finalize your decision.
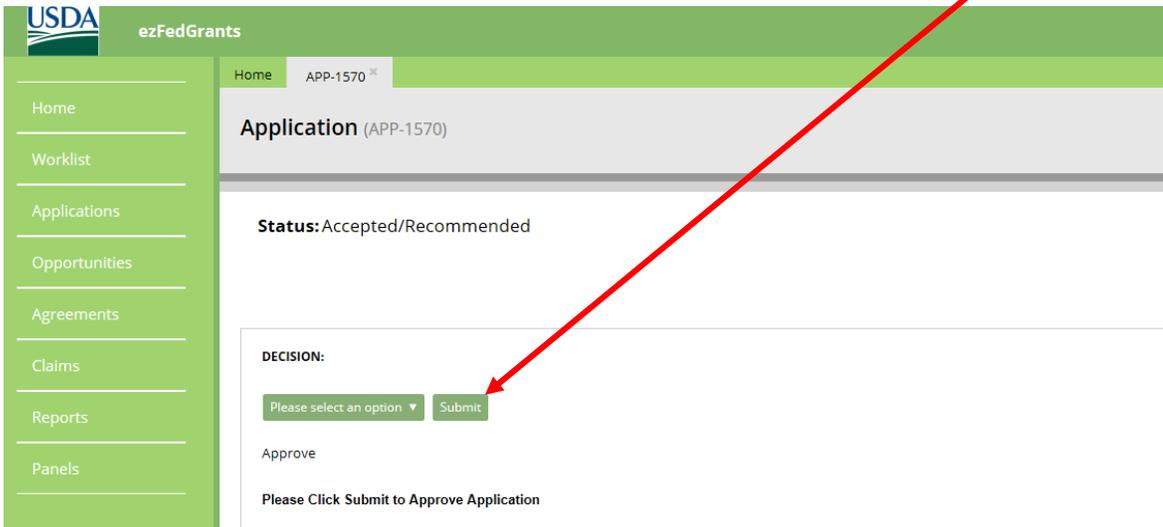
Successful Acceptance changes the Status to **Grant Review** and will generate a **confirmation banner** indicating that the application has been successfully accepted**.**
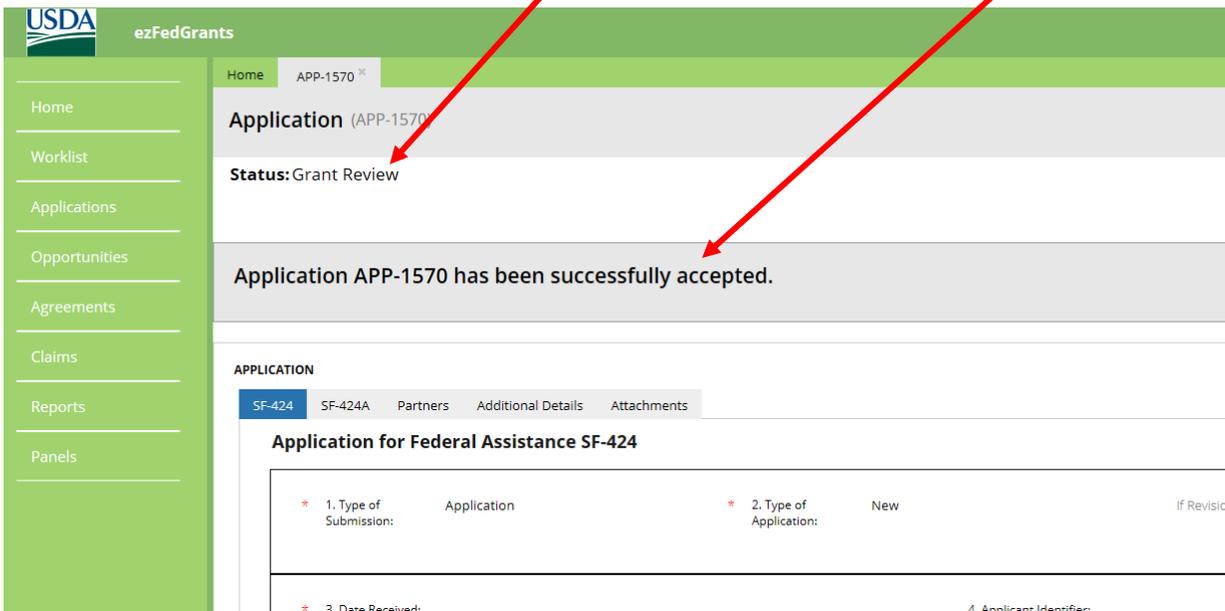
At this point the work flow has moved the application to the AS for review. It will no longer be in your pending applications list until the AS has completed the review. Once the AS has reviewed the application you will receive another email notification indicating the same application is available for 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.

Tue 6/20/2017 1:38 PM

USDA External Portal Workflow System <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-APHIS-10025-PPQS&T00-17-0066
- **Organization Name:** PENNSYLVANIA 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#:** 10.025

ezFedGrants

Thank you.

Click the **ezFedGrants** link provided for your convenience. This will open the eAuth login page for FMMI shown below.
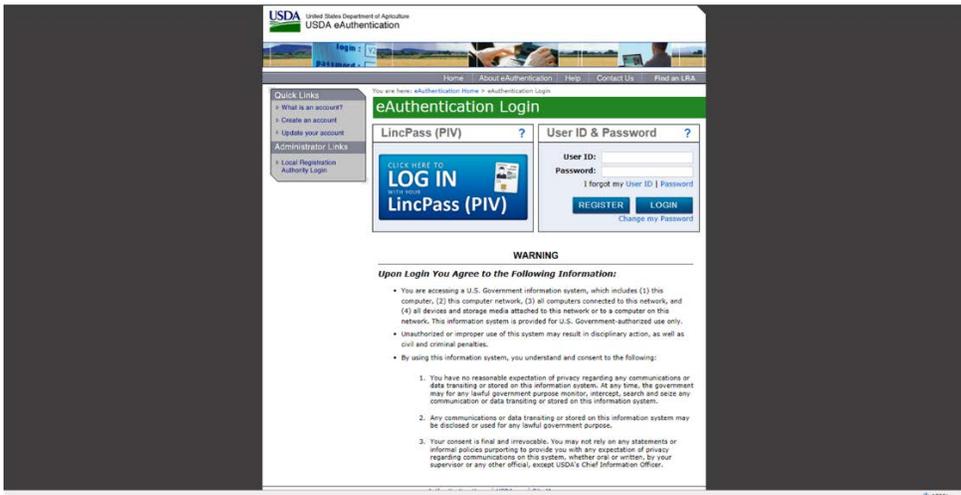
Once logged in, your FMMI home page will be displayed. Click on the **Grantor Management** tab.
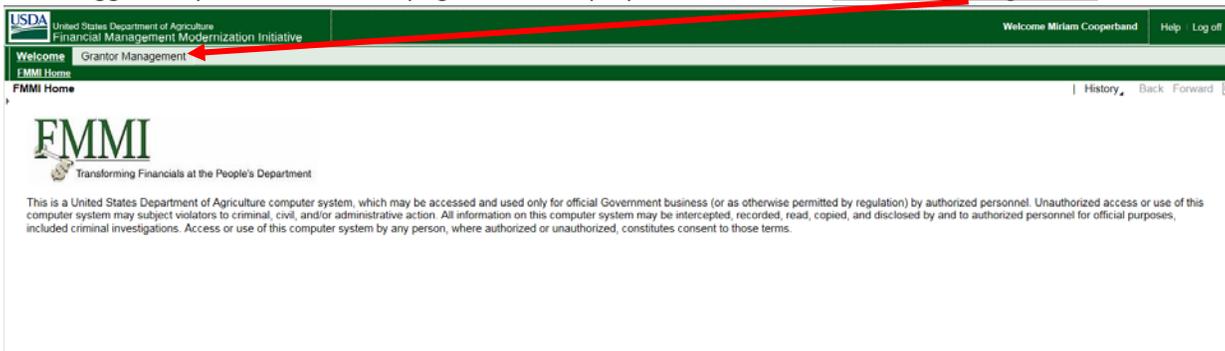
This will add the dropdown menu to the left side of the page. To further expand this menu click on the small **arrow** next to the added link.

> Do not click on the link for *Grants and Agreements Management* as this will take you to the internal portal. You will need to access the external portal for this action.

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**.
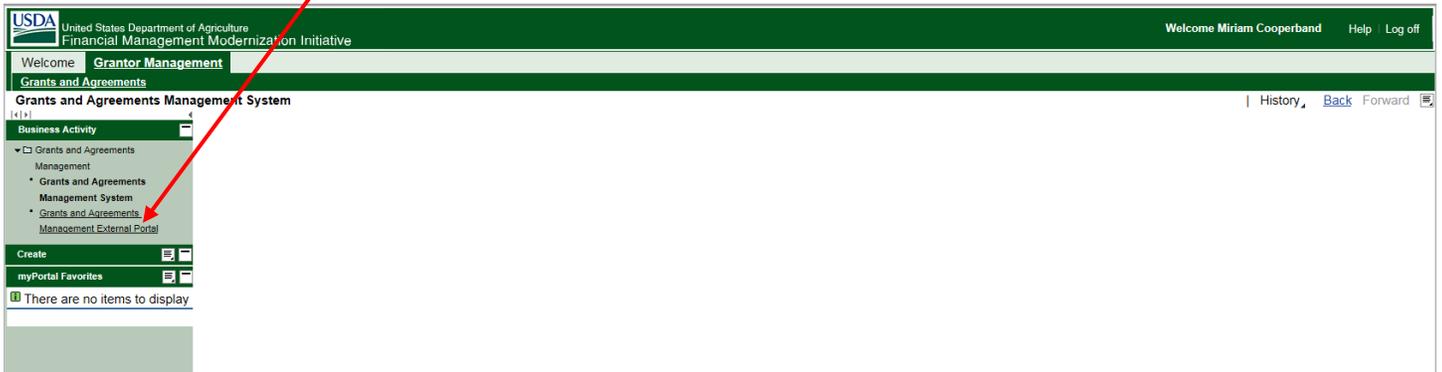
This will direct you to the external portal. Click on the tile titled **Pending Applications**.
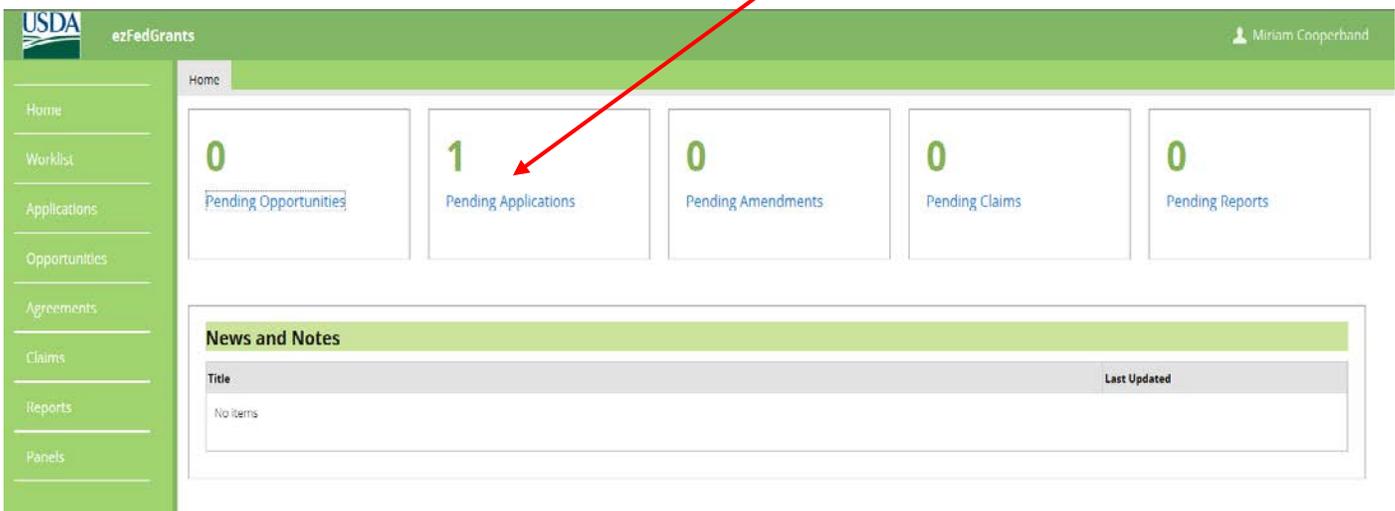
A popup box will appear with all pending application. Click on the **Application ID Number** for the application to be approved.
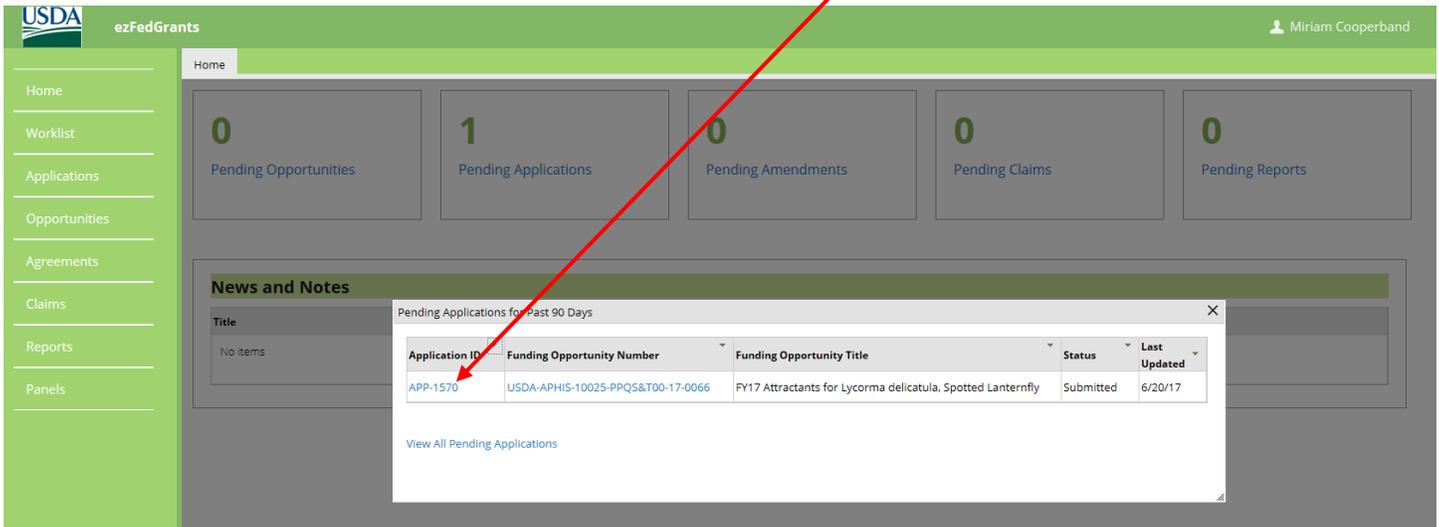
One may click on the Funding Opportunity Number and review the opportunity that the application has been submitted against. If you chose to do this, you must return to the pending applications and select the application to take action.

Upon clicking the Application ID number the application will be displayed. You may use the **tabs** under the Decision box to review the different documents submitted with the application. Once you have reviewed the application click on the dropdown **arrow** in the green *Please select an option* button located in the Decision box.
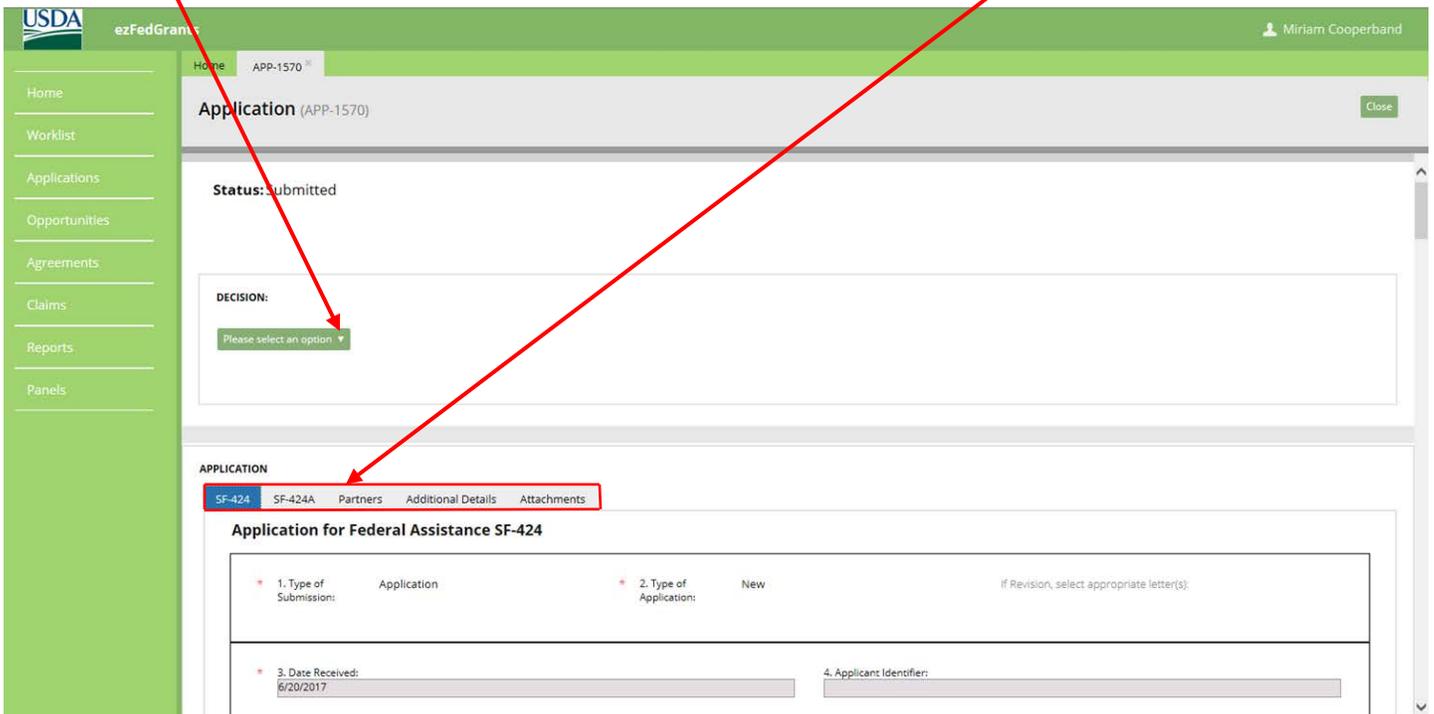
Clicking on the dropdown will provide several choices. To move the application forward in the work flow select **Approve**.
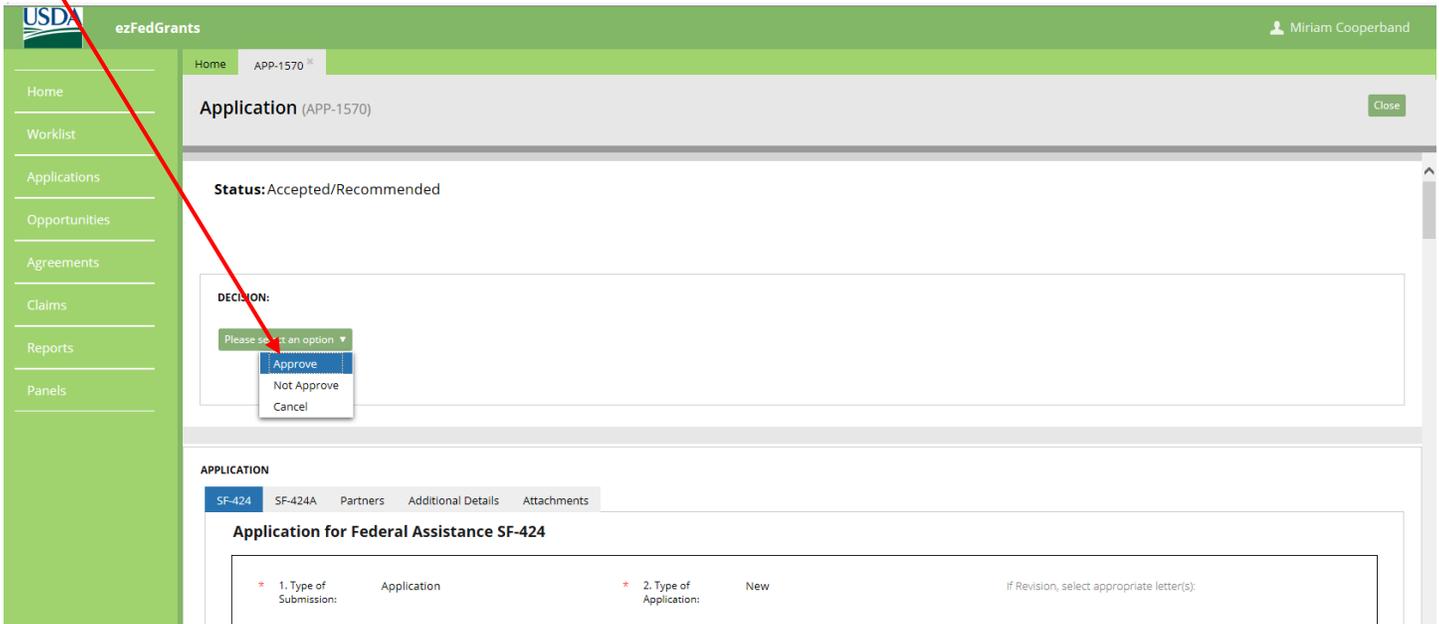
Once you have selected your decision, note the addition of the Submit button to the page. Click on the **Submit** button.
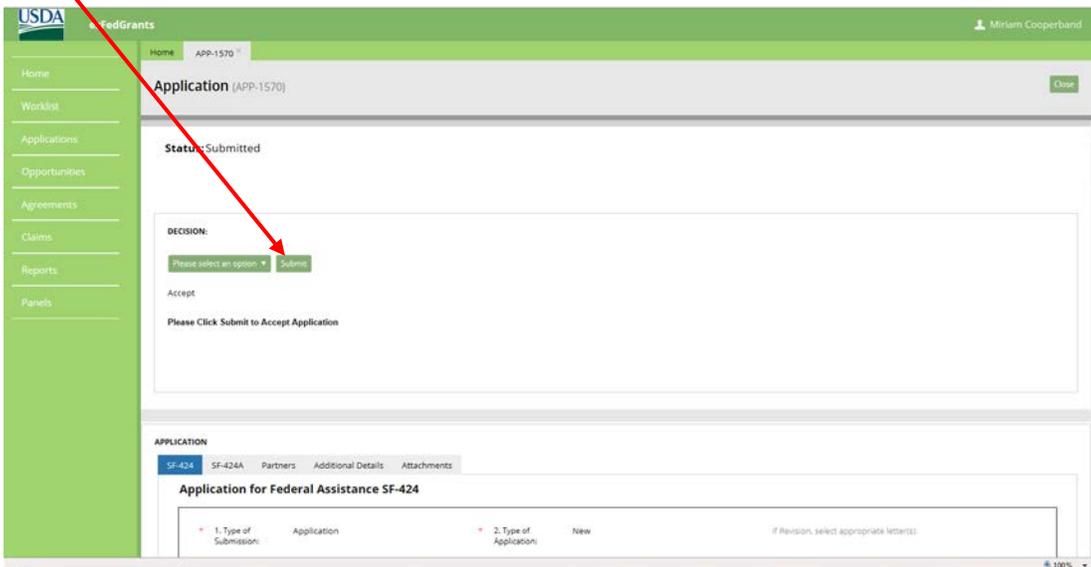
Some find it confusing to note from the beginning of this process that the Status has indicated *Submitted*. This is a reference to the application being submitted to the Program Manager by the cooperator. By pushing the Submit button you are *approving* the application and sending it forward in the 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.
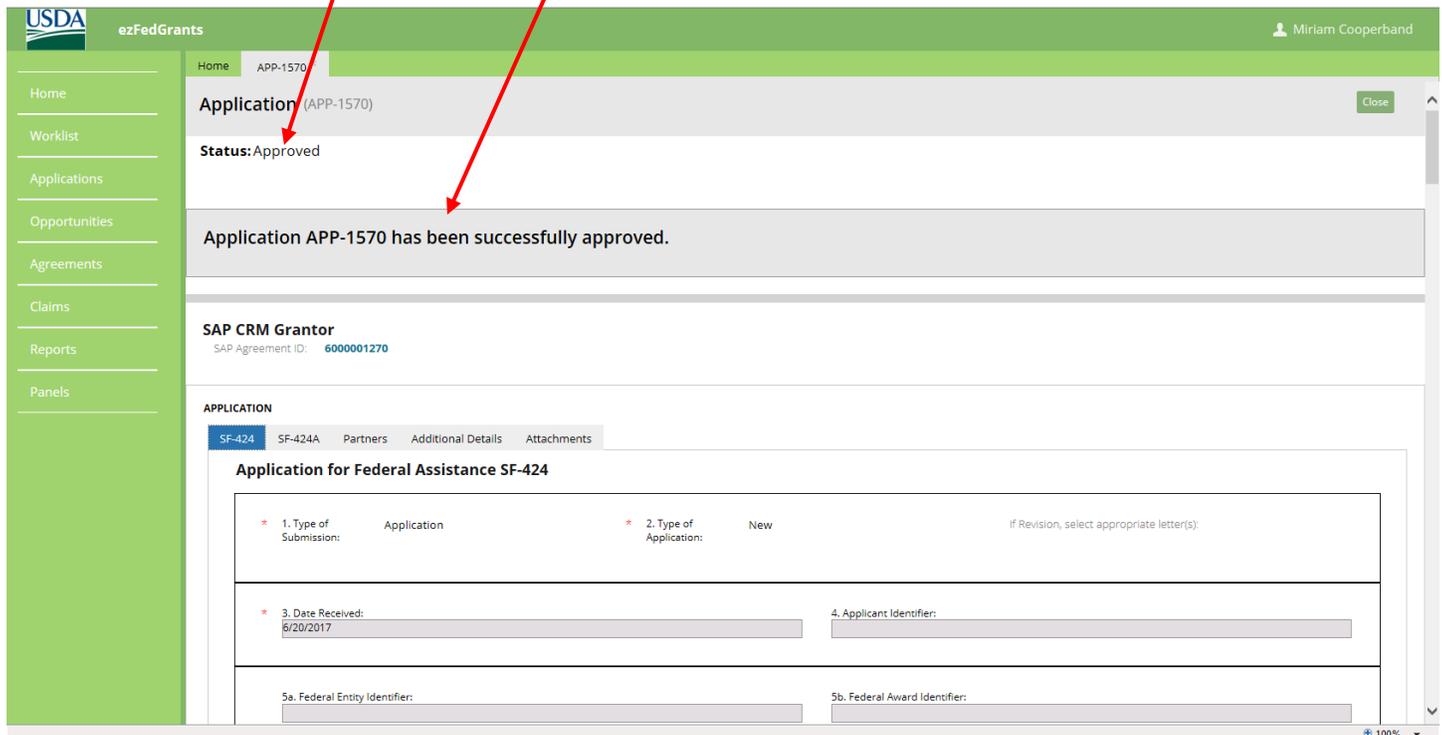
Once you have approved the application you will receive a copy of a system generated email to your cooperator similar to the one below indicating that the application has been approved and the process of generating the award has begun.
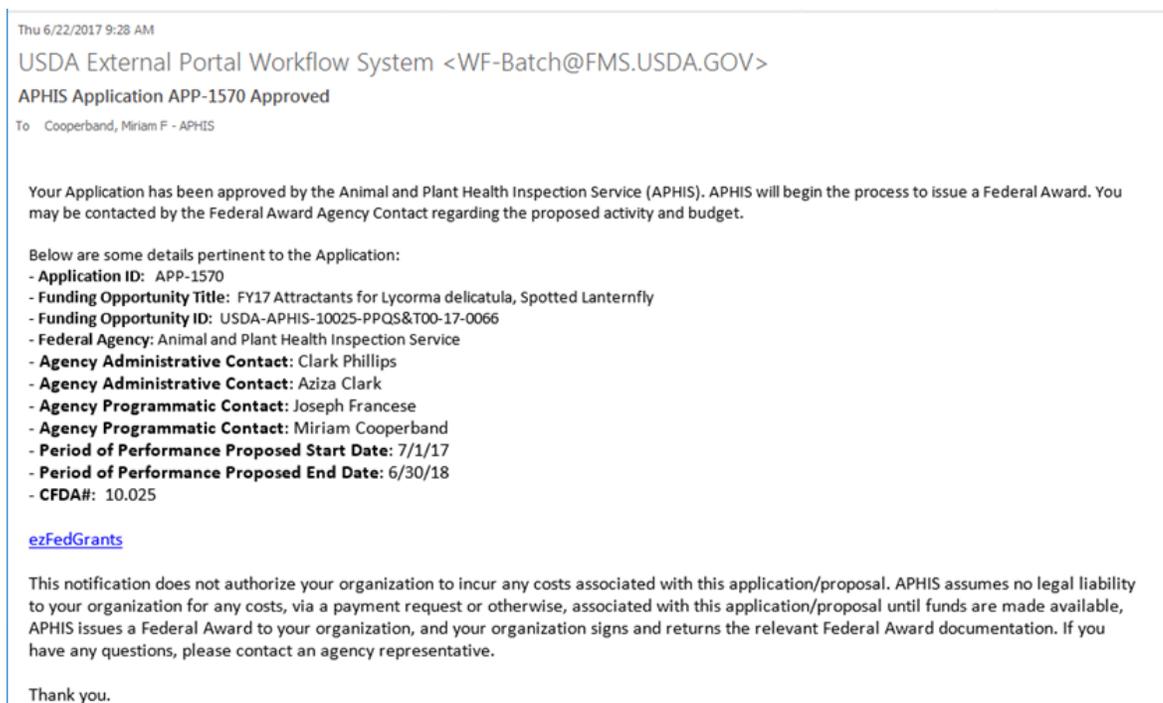
The workflow will now provide a draft award document to the agreement specialist for review. You next action for processing this agreement will be the approval of the award document in the internal system.

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**.

Thu 6/22/2017 11:33 AM

WF-BATCH <WF-BATCH@FMS.USDA.PRIV>

Action Required: Agmt 6000001270 Routed for Approval

To   Cooperband, Miriam F - APHIS

ℹ We removed extra line breaks from this message.

The above mentioned agreement is ready for your review and action in the ezFedGrants Internal Portal.

Below are some details pertinent to the agreement:

-Agreement ID: 6000001270
-FAIN:
-CFDA Number: 10.025
-Authority: 7 USC 7701-7772
-Period of Performance Start Date: 07/01/2017 -Period of Performance End Date: 06/30/2018 -Project Title: FY17 Attractants for Lycorma delicatula, -Desc. Title of Applicant's Project: Attractants for Lycorma delicatula, Spotted Lanternfly -Obligation Amount: 93,000.00
-Recipient: PENNSYLVANIA STATE UNIVERSITY, THE PENN STATE -Grants Specialist: CLARK PHILLIPS -Program Manager: Miriam Cooperband
-Notes:

Thank you.

> 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.
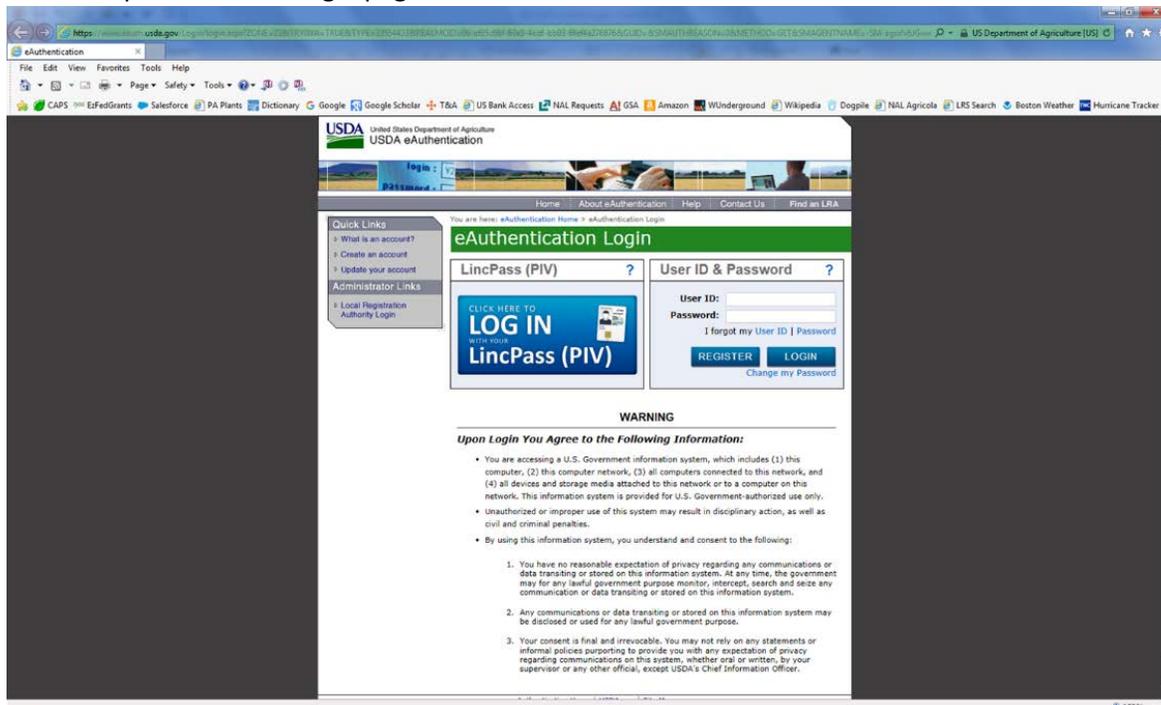
Once logged in, your FMMI home page will be displayed. Click on the **Grantor Management** tab.
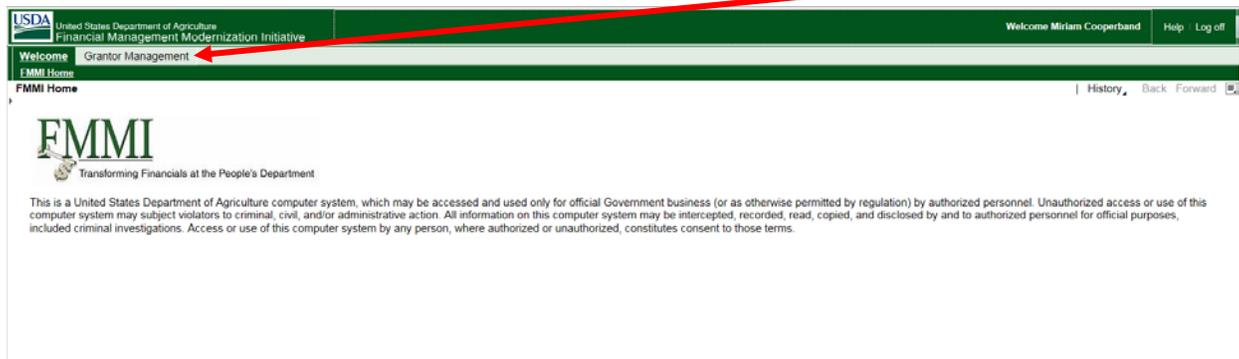
This will add the dropdown menu to the left side of the page. To further expand this menu click on the small **arrow** next to the added link.
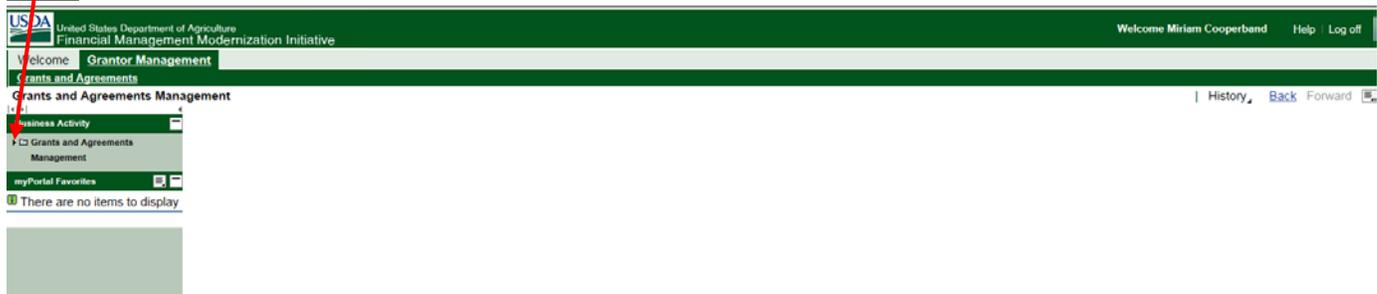
Clicking this arrow will expand the dropdown choices and provide you with a link to the external portal. Click the link that says **Grants and Agreements Management System**.
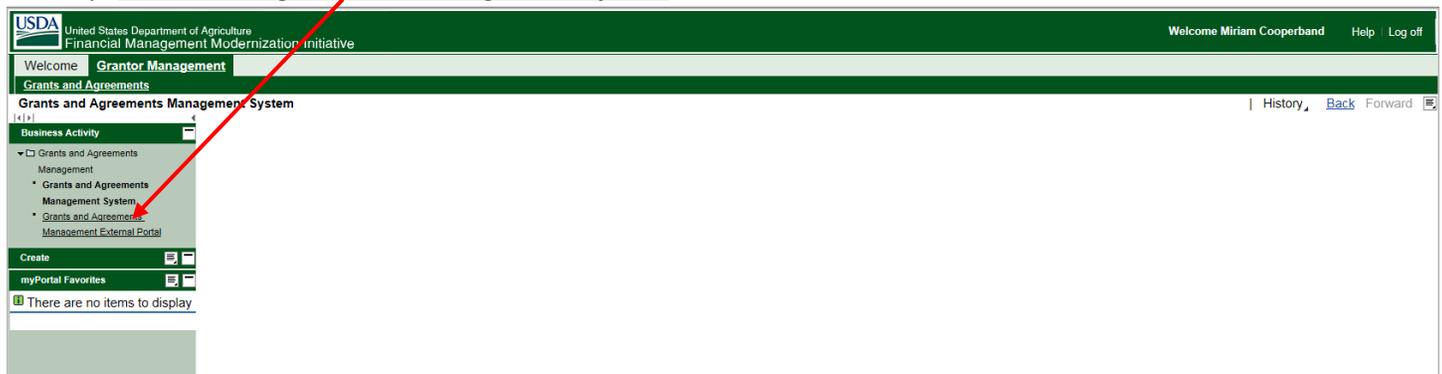
This will bring you to your internal portal dashboard. You will note one of the three banners is titled Workflow Tasks. **Click** on the item you wish to work on.
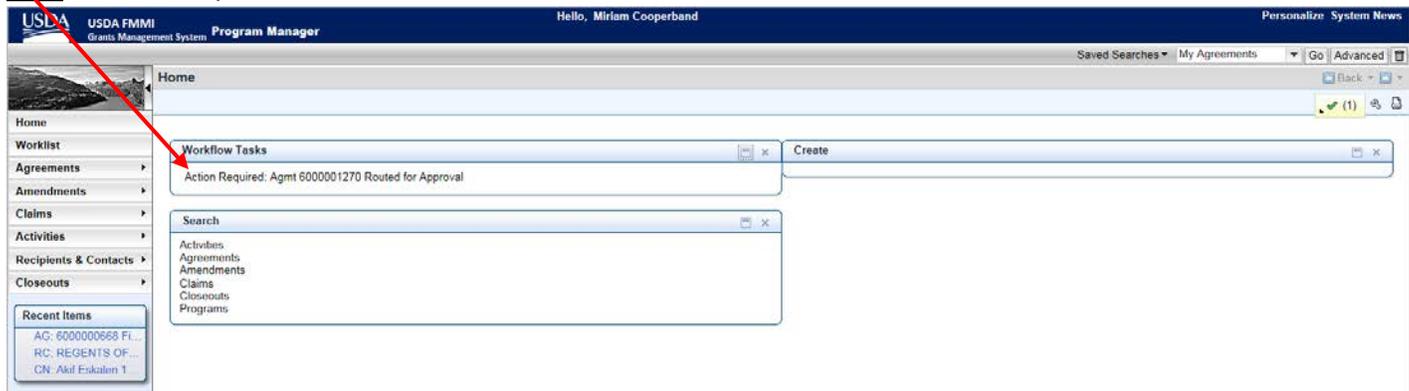
The resulting screen will provide you with a decision box and description of the agreement. Note the decision dropdown box defaults to **Approve**. If you wish to approve the award document click the **Execute Decision** box.
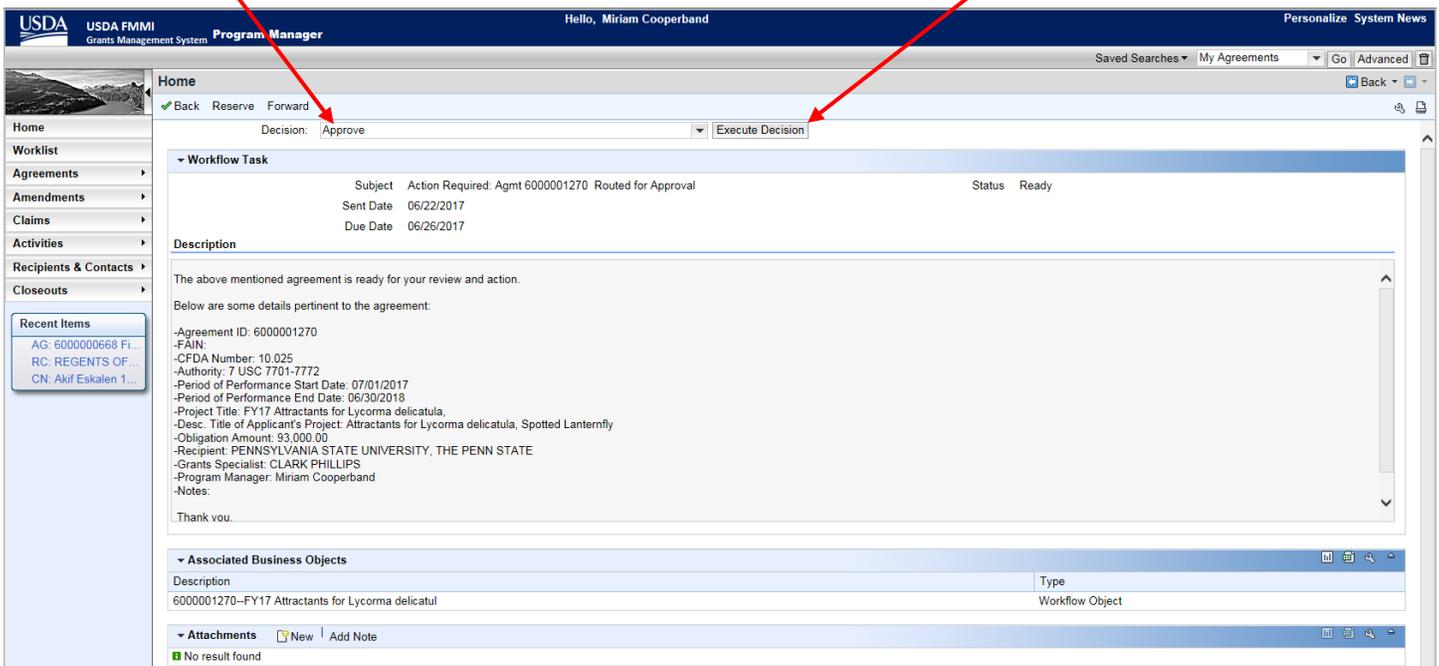
If you wish to execute a decision other than Approve, click on the dropdown arrow and select the appropriate decision.

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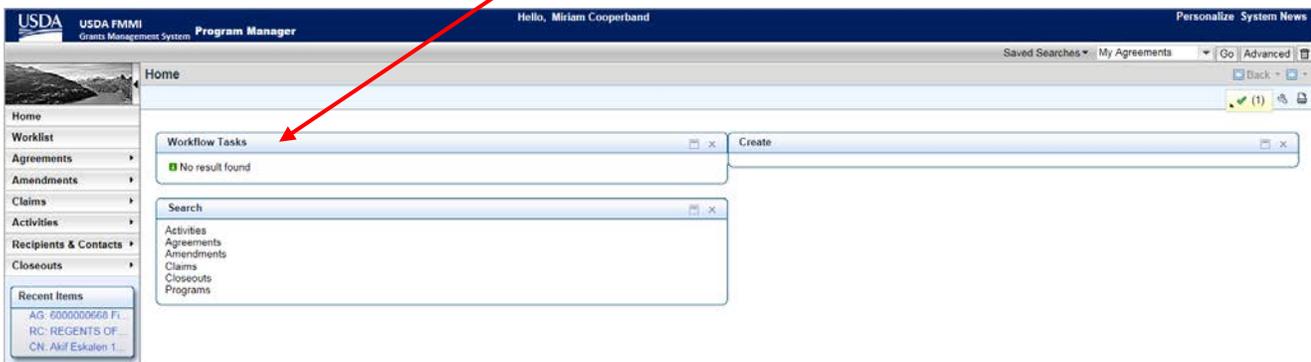
The award document has been approved and the work flow has now forwarded the award document to the signatory official(s) of your cooperator.

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 **ezFedGrants** hyperlink to get to the user home screen or navigate through the FMMI site.

From: USDA External Portal Workflow System [mailto:WF-Batch@FMS.USDA.GOV]
Sent: Friday, May 05, 2017 11:25 AM
To: Watkins, Jason J - APHIS <Jason.J.Watkins@aphis.usda.gov>
Subject: APHIS Agreement AP17PPQFO000C093 Claim Pending Review

A claim is ready for your review in the USDA Animal and Plant Health Inspection Service External Portal.

Below are some details pertinent to the Claim:
-**Claim ID**: CLM-617
-**Agreement Title**: FY17 TN IFA
-**FAIN**: AP17PPQFO000C093
-**Agency Programmatic Contact**: Jason Watkins
-**Invoice Amount**: $36,350.58

ezFedGrants

Thank you.

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**.
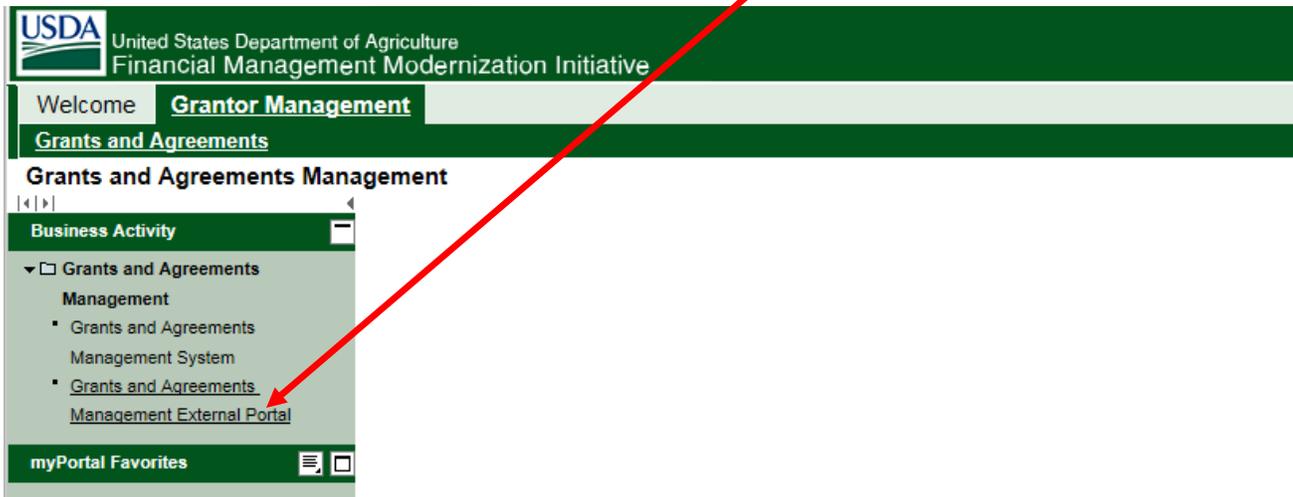
Click on **Pending Claims** tile.
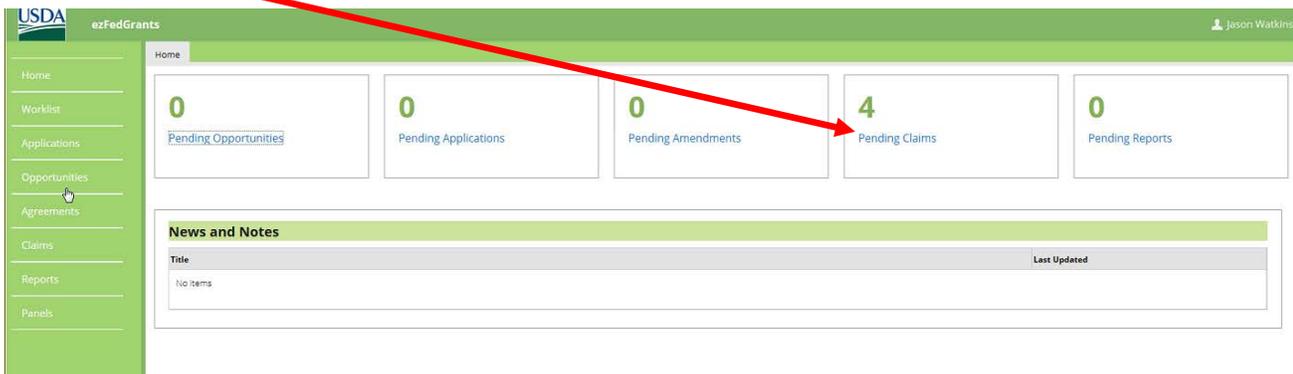
The **Pending Claims for the Past 90 Days** window opens. Click the **Claim ID** for the claim you wish to address.
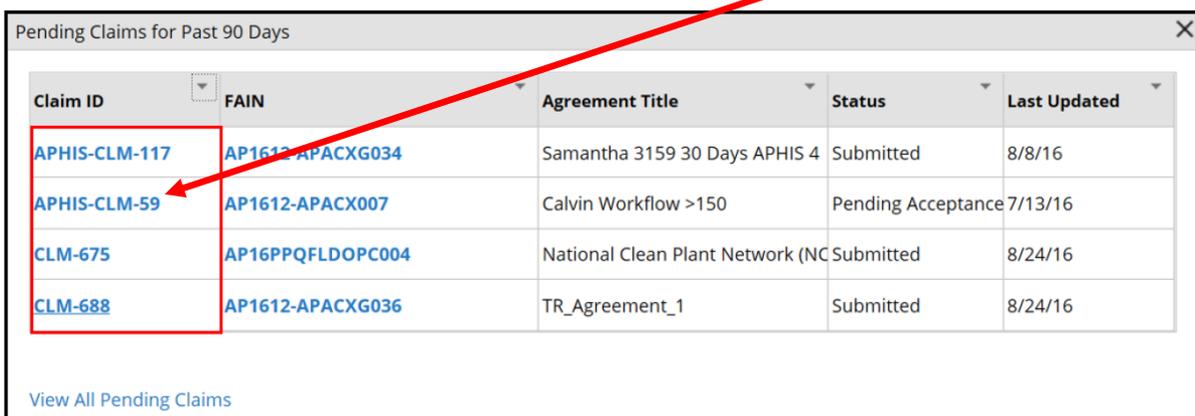
This opens the claim screen for that claim. Review claim document information by using the provided **tabs** below the Decision box. After review select the green **Please Select an Option** dropdown box.
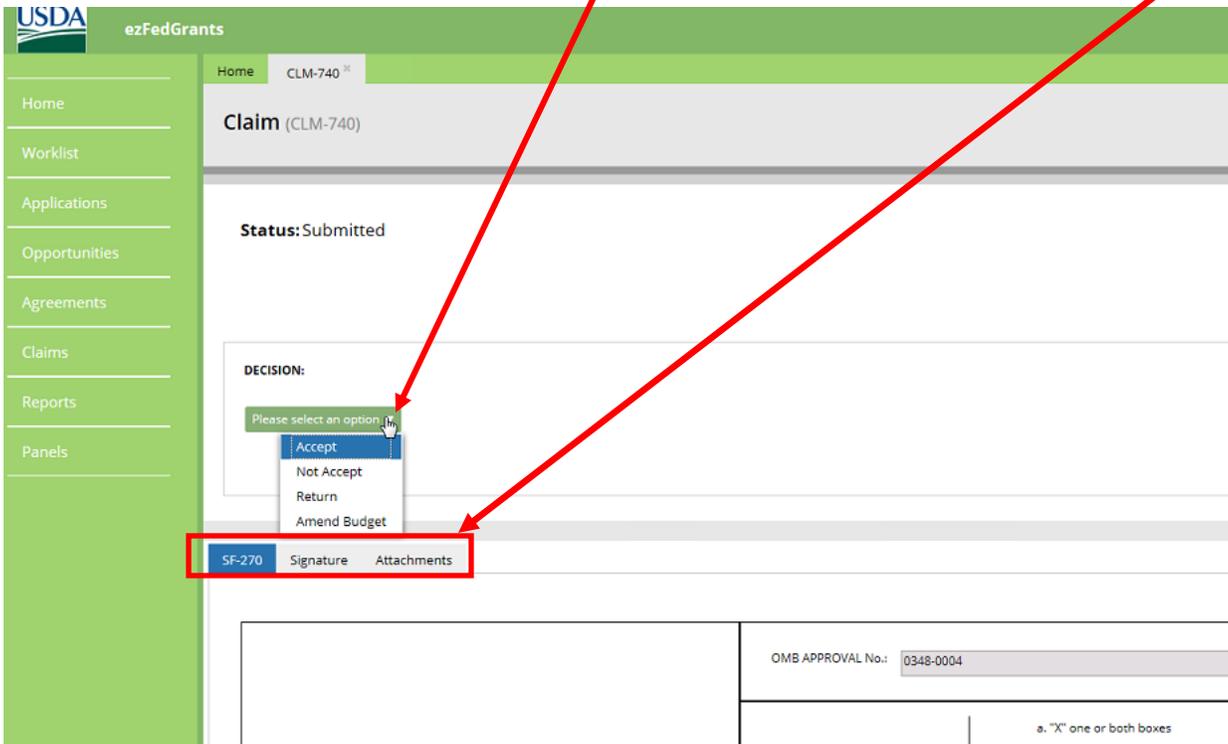
Click **Accept** to accept the claim for immediate processing.
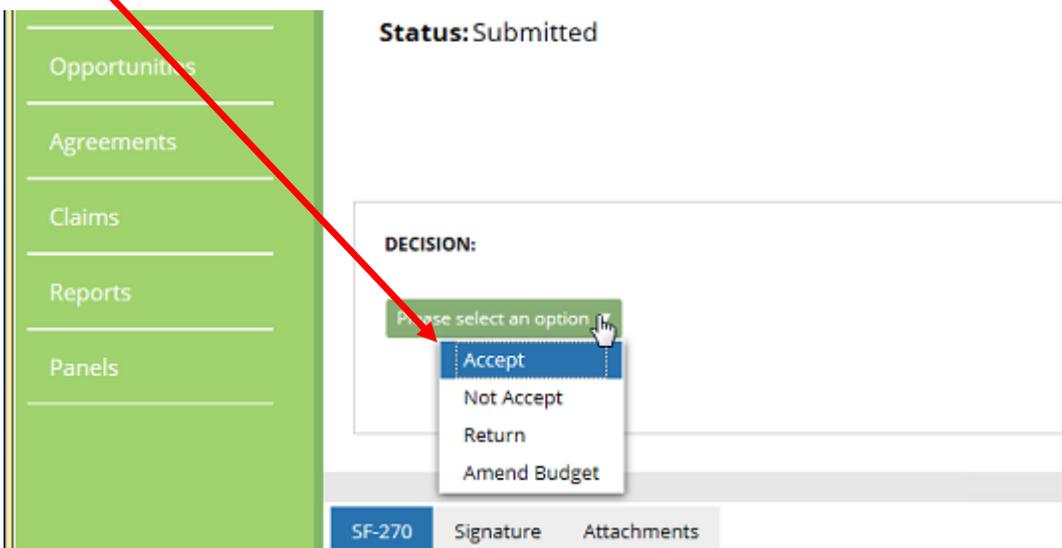
- **Not Accept** voids the claim submission.
- **Return** sends the claim back to the applicant for corrections.
- **Amend Budget** accepts the claim but delays processing until the agreement budget has been amended.

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 https://www.aphis.usda.gov/mrpbs/fmd/downloads/ezFedGrants-External-Portal-Claim-Acceptance-and-Payment.pdf

After selecting a decision, the Submit button will appear. If required, provide justification for your decision, then click **Submit**.
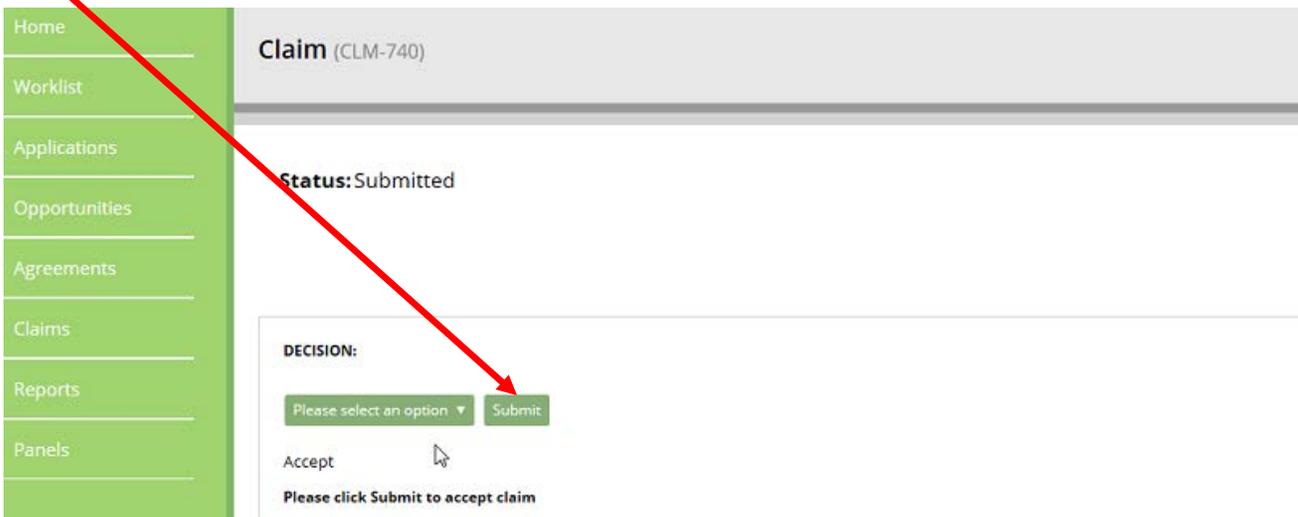
Successful submission of an Accepted claim will update the **Status**, generate a **confirmation banner**, and generate a **Claim ID**.
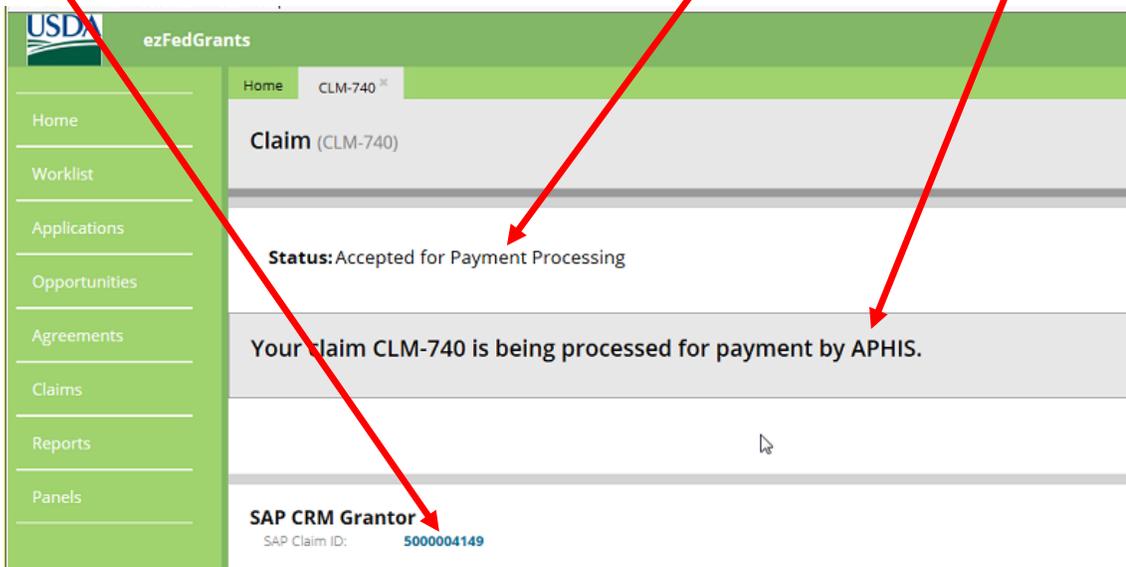
Upon submission in the external portal the workflow will route the claim to the Grant Specialist. Once the Grant Specialist has reviewed and assigned the appropriate accounting information the work flow will move the claim back to the Program Manager. You will receive an email notifying you that the claim is waiting for your approval in the internal portal.

Login to your home page at https://portal.fms.usda.gov .
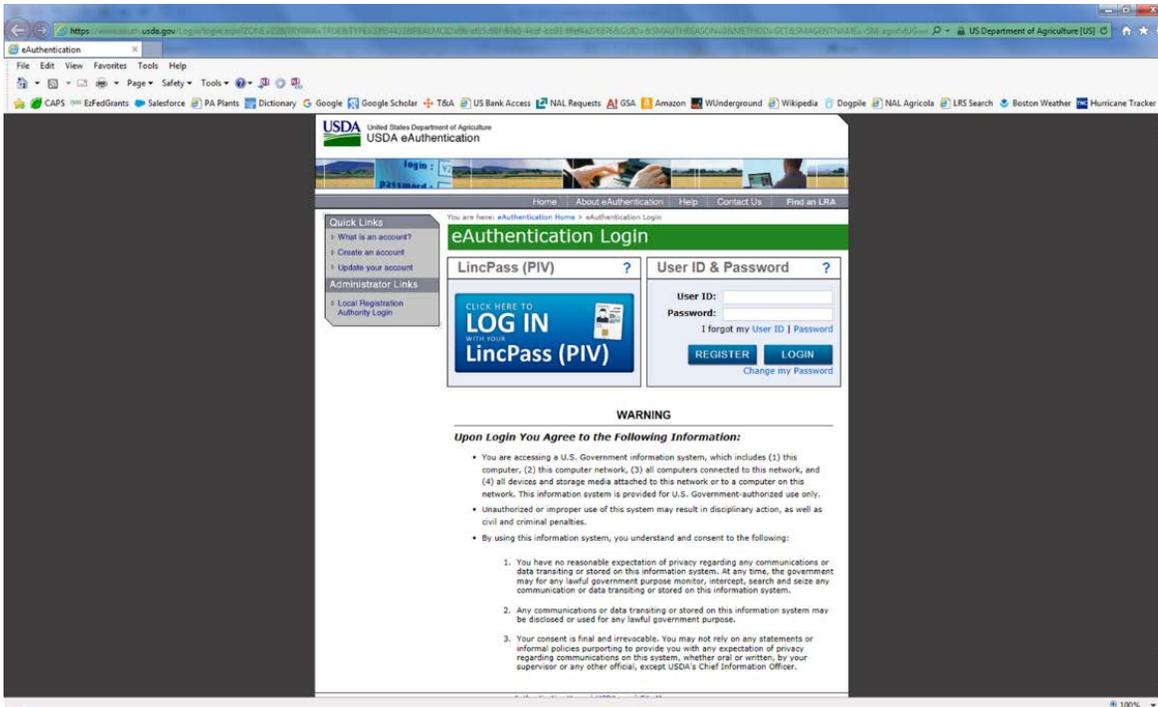
This will open the eAuth login page for FMMI shown below.

Once logged in, your FMMI home page will be displayed. Click on the **Grantor Management** tab.
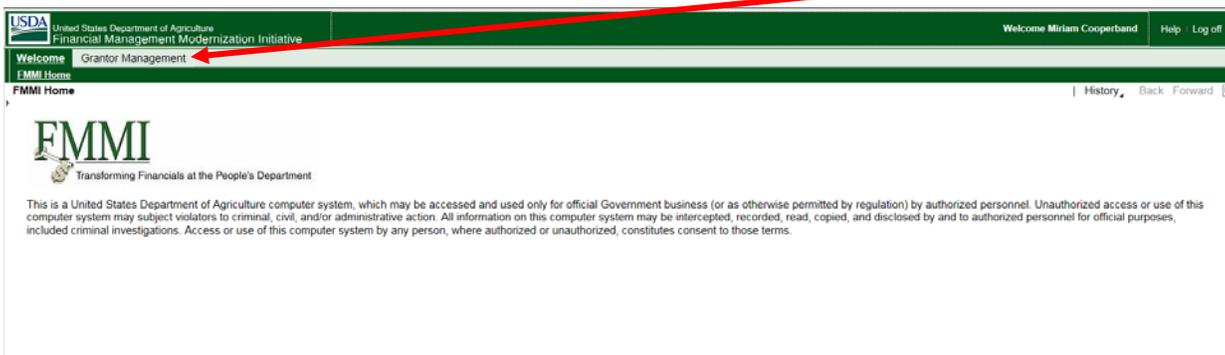
This will add the dropdown menu to the left side of the page. To further expand this menu click on the small **arrow** next to the added link.

Clicking this arrow will expand the dropdown choices and provide you with a link to the external portal. Click the link that says **Grants and Agreements Management System**.
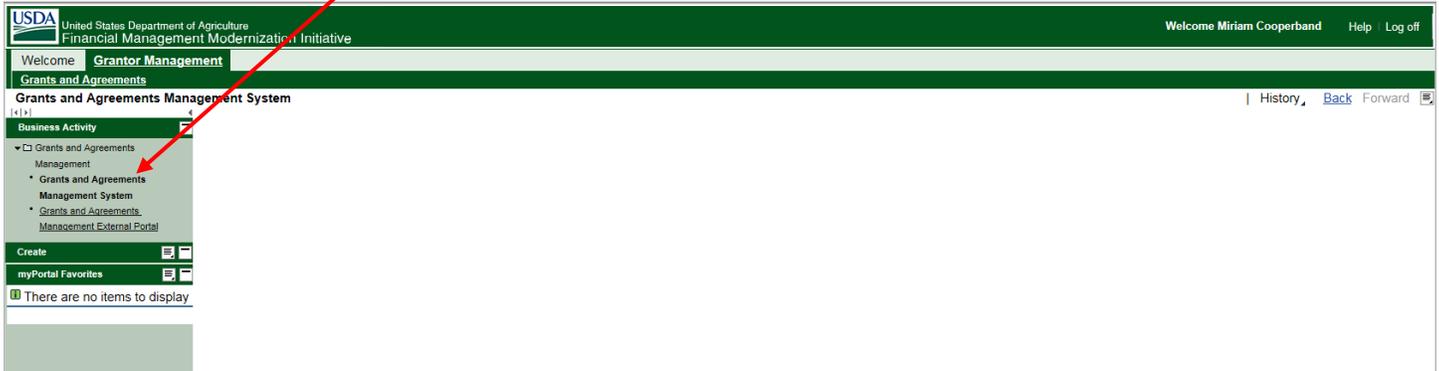
This will bring you to your internal portal dashboard. Under the Workflow Tasks tile click on the appropriate task that will be labeled **Action Required: Claim** (your claim number here) Routed for Approval.
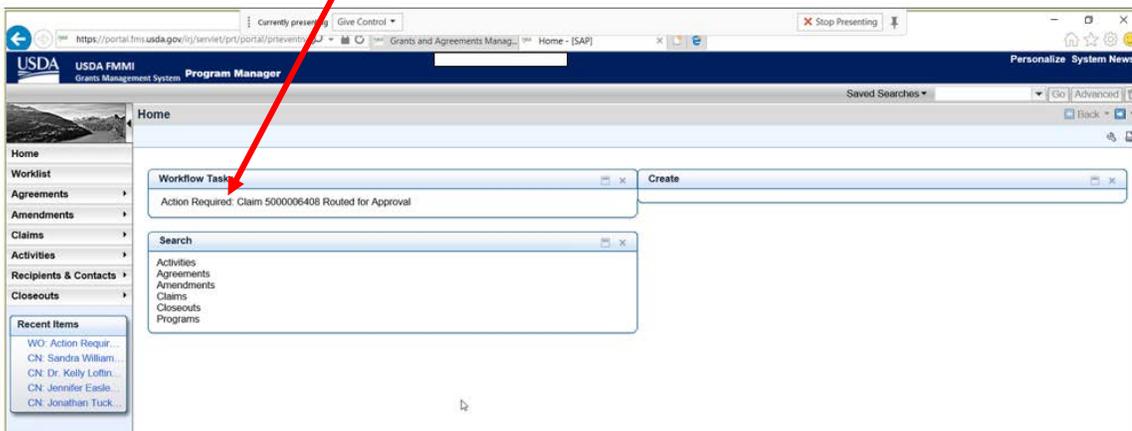
The claim will appear with the certification statement in the Description. You will note the Decision defaults to Approve. After review, to approve the claim click **Execute Decision**.
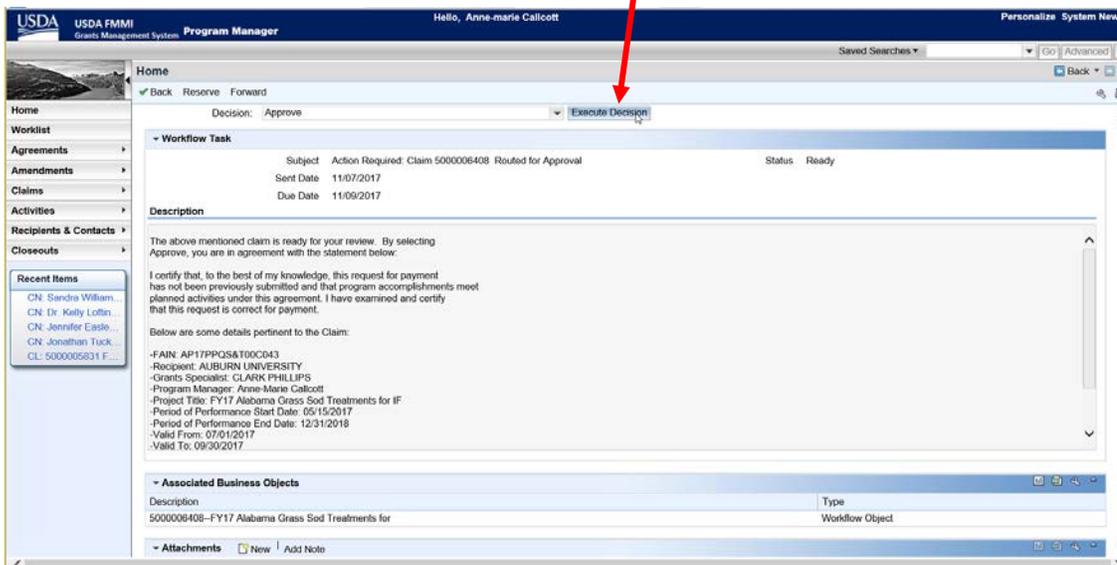
Your home page will refresh and you will note that the task will no longer be in your Workflow Task.
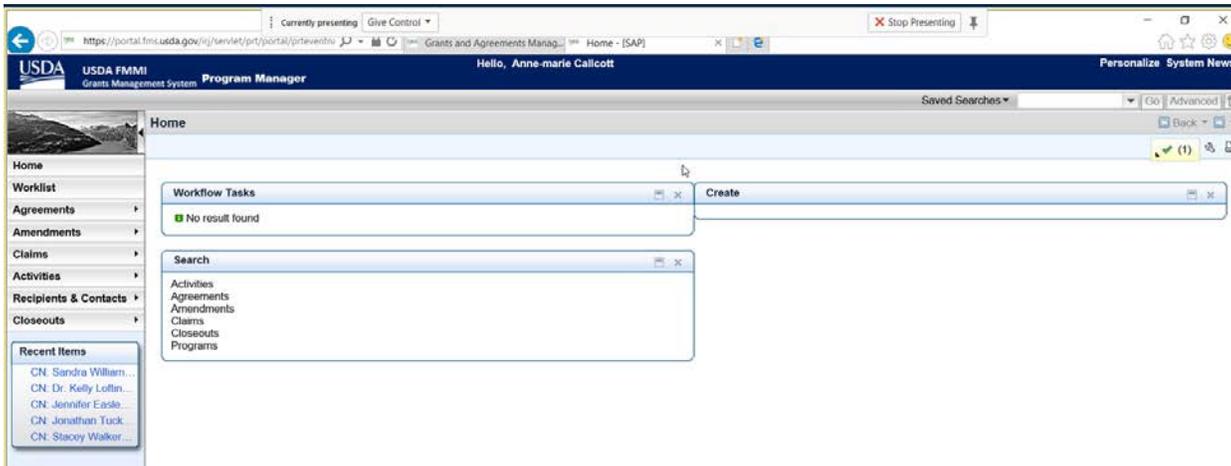
Accepting Reports

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 access the Business Activity links on the left side of the screen.
Click on the small **green arrow** to next to Grants and Agreements Management.
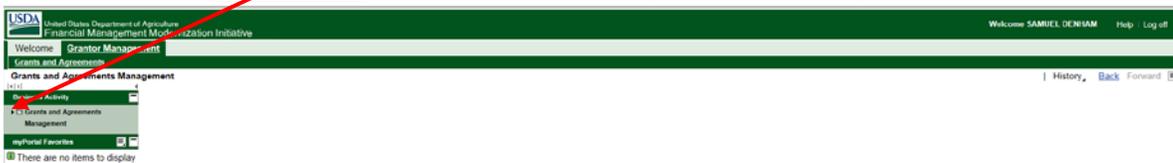
This will expand the links to show both the internal and external portals. Click on the last link,
Grants and Agreements management External Portal.
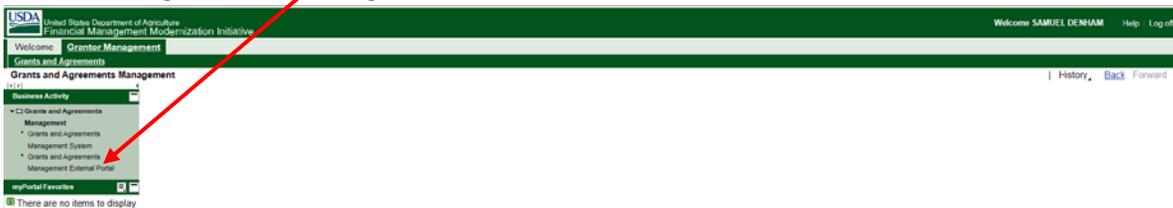
Your external portal home screen will appear. Click **Pending Reports** from the tiles across the top of the page.
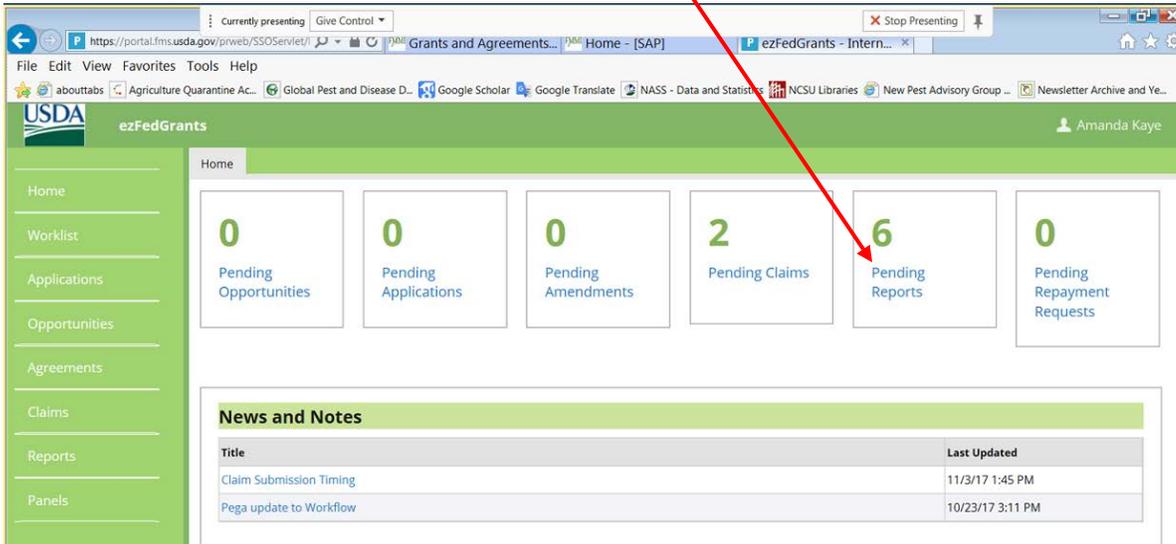
This will display a pop up titled Pending Reports for Last 90 Days. From the pop up box select the **Report ID** for the report you wish to approve.
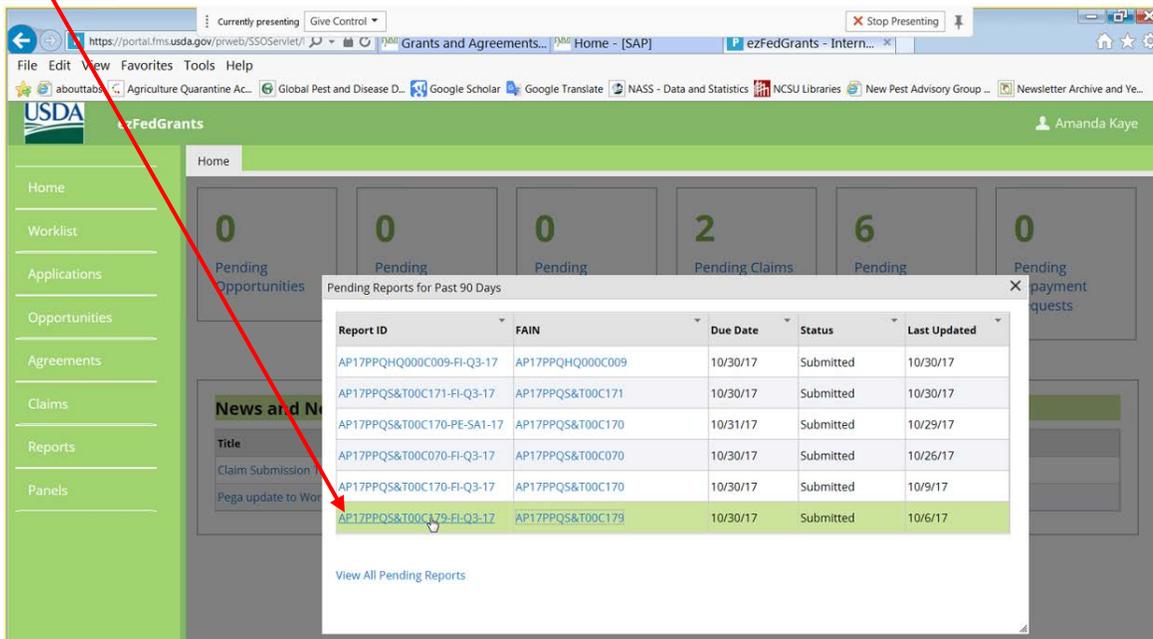
The screen displayed will depend on the type of report you are approving. Both Accomplishment Reports and Financial Reports are approved in the same manner. In this example, a Financial report is approved.

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.
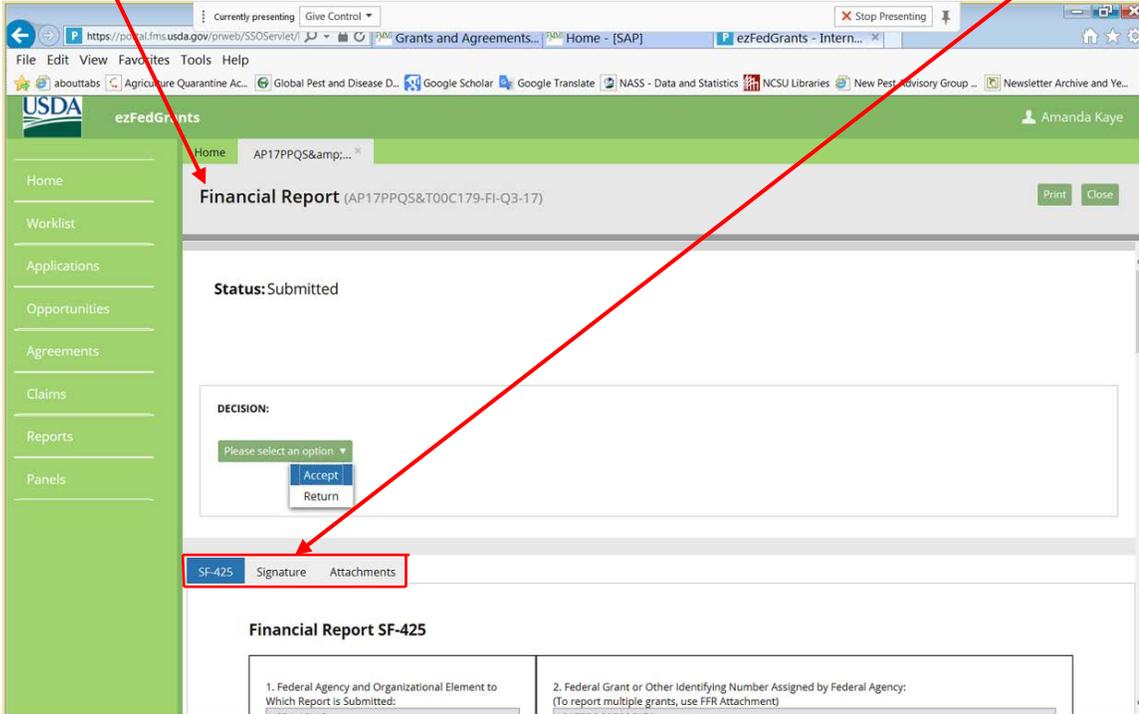
Once the report has been review by clicking on the appropriate tab, click on the Please select an option dropdown. You will be given the choice to Accept or Return. Click **Accept** to approve the report.
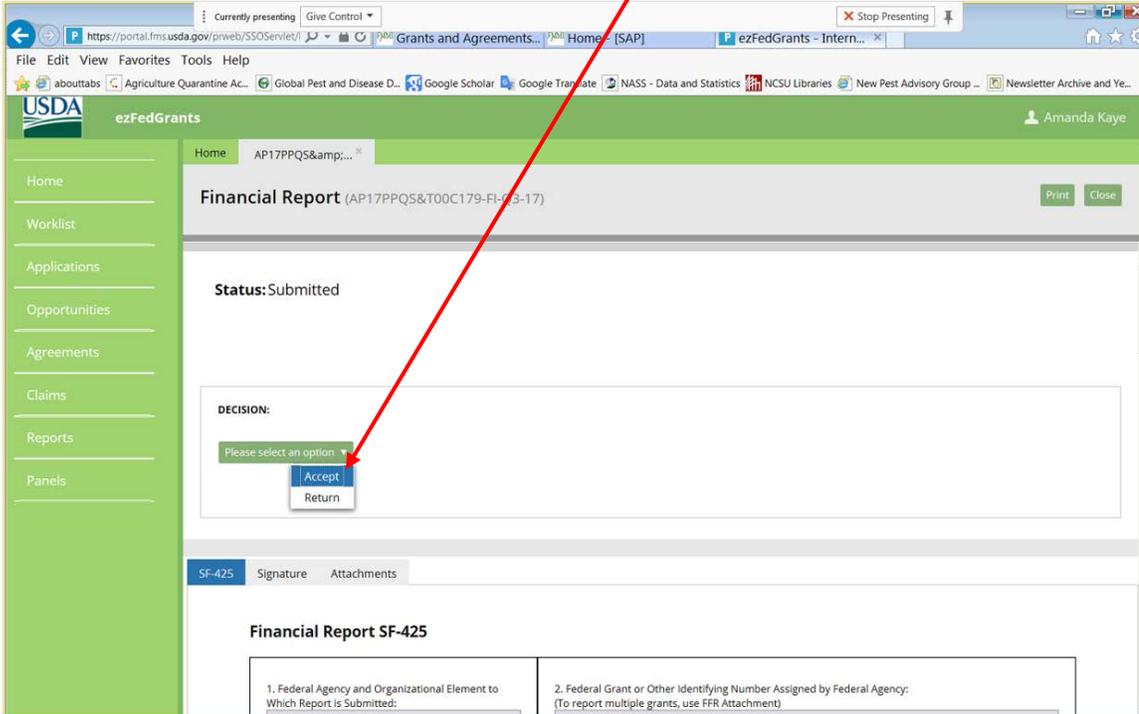
The submit button will appear when you make the selection. Click **Submit** to accept the report.
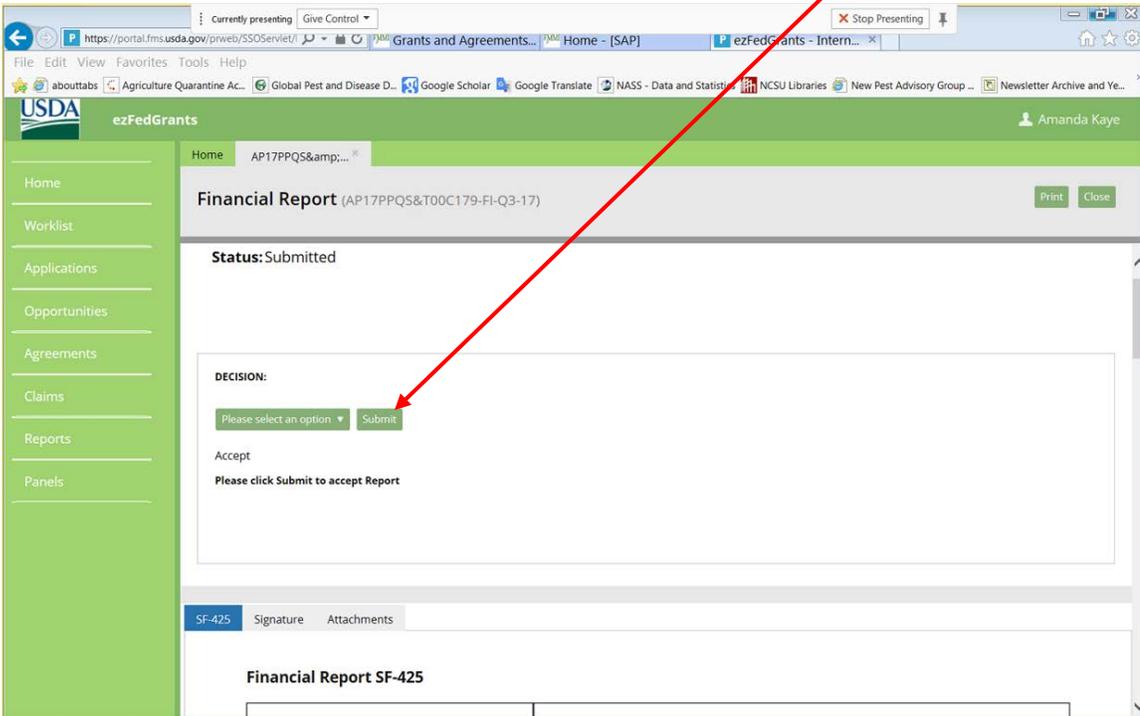
The Status of the document will change to **Accepted** and a **banner** will appear showing the report has been successfully accepted.
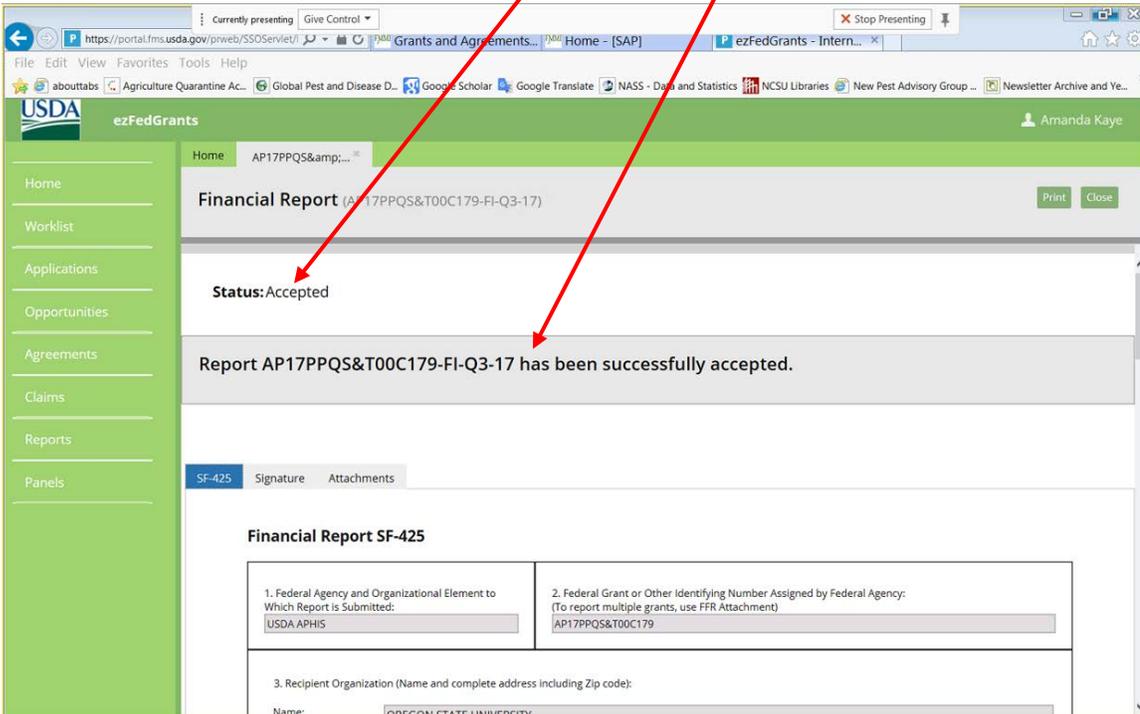
Closeout of Agreements

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.