

External User Guide for ezFedGrants

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Introduction

This document is a role-based reference for basic actions to be taken 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. If you chose to make any selection other than moving the action forward in the workflow, the link following the explanation will provide instructions for this purpose.

The Table of Contents functions much like an index. To use it, first identify the correct role in the ezFedGrants system, and then under that role in the Table of Contents, find the action. Scroll to the page listed adjacent to the action and find the steps required to complete it. 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. Links for more in-depth assistance follow the conclusion of the last step.

System Acronyms and Abbreviations

AGO – Administrative Grants Officer – recipient user
AGMO - Agency Grants Management Officer – federal user
AS – Agreements Specialist – federal user
CRM – reference to internal system
eFG – ezFedGrants
FAIN – Federal Agency Identification Number
GP – Grants Processor - recipient user
GE – Grantor Evaluator – federal user
PEGA – reference to external system
PM – Program Manager – federal user
SO – Signatory Official – recipient or federal user
eAuth – Level 2 eAuthenticaton credential
FFATA - Federal Funding Accountability and Transparency Act

Rules to Play By

The purpose of this section is to state some of the basic precepts of the system and to provide some notes that are just good information to have.

- ❖ ezFedGrants is often abbreviated as eFG
- ❖ eFG is a role based system and each individual can only function in one role at any given time.
- ❖ Everyone wishing to enter the system must obtain a Level 2 eAuthentication credential and then request access to the system.
- ❖ Each recipient must have at least one GAO and one Signatory Official. If possible, it is recommended that each recipient have at least 2 individuals in each role.
- ❖ eFG organizes recipients by DUNS number. If your organization has multiple DUNS numbers, at the present time, each DUNS number must have one GAO and one Signatory Official (a change to allow users to function under more than one DUNS will come in future releases)
- ❖ Search Functions, with few exceptions, will only return results in read only format and does not allow one to edit or advance a document through the work flow.
- ❖ When all else fails, click the **Actionable Items** tile. At the current time, the Actionable Items tile may show 0 items but when clicked show results requiring action (known issue to be corrected in future release).
- ❖ At the current time, if a Grants Processor or GAO begins the application creation process, that person must complete the application...other users cannot update or edit the application (known issue to be correct in future release).

ezFedGrants External User Roles (Recipients)

Grant Administrative Official (GAO): This role has the most permissions of all the external portal users. Each organization must have at least one GAO to use the ezFedGrants External Portal. The GAO performs the same tasks as the Grant Processor role with two major differences:

- Responsible for approving subsequent user role requests from within the grantee’s organization
 - Approve access requests, change user roles, deactivate user access
- Ability to manage the overall system accounts for the grantee’s organization
 - View applications, opportunities, award documents, claims, and reports
- May also perform:
 - Create claims and applications
 - Create reports for agreements on which they are listed as a Primary or Secondary Program Contact
 - Be designated as a Certifying Official (secondary designation)

Grant Processor Role (GP) - This role is capable of performing the following functions:

- Create claims and applications
- Create reports for agreements on which they are listed as a Primary or Secondary Program Contact
- Be designated as a Certifying Official (secondary designation)

Signatory Official: This role has a limited scope compared to the other roles, but each organization must have at least one Signatory Official in order to use the ezFedGrants External Portal. This role is capable of approving/signing applications and/or agreements and amendments. The Signatory Official may also certify claims, financial reports and performance reports.

- Review and digitally sign grant award applications and grant award packages
- Be designated as a Certifying Official (secondary designation)

		ezFedGrants External Portal (Pega) Object						
		Opportunity	Application	SF-270	Award Documents	Agreement	Amendment	Reports (Financial and Performance)
Role Type	Peg Role Mapping							
External Users	Grants Administrative Officer	SD	CUSD	CUSD	SD	SD	SD	USD
External Users	Grants Processor	SD	CUSD	CUSD	SD	SD	SD	USD
External Users	Signatory Official	SD	SD	SD	USD	SD	SD	USD

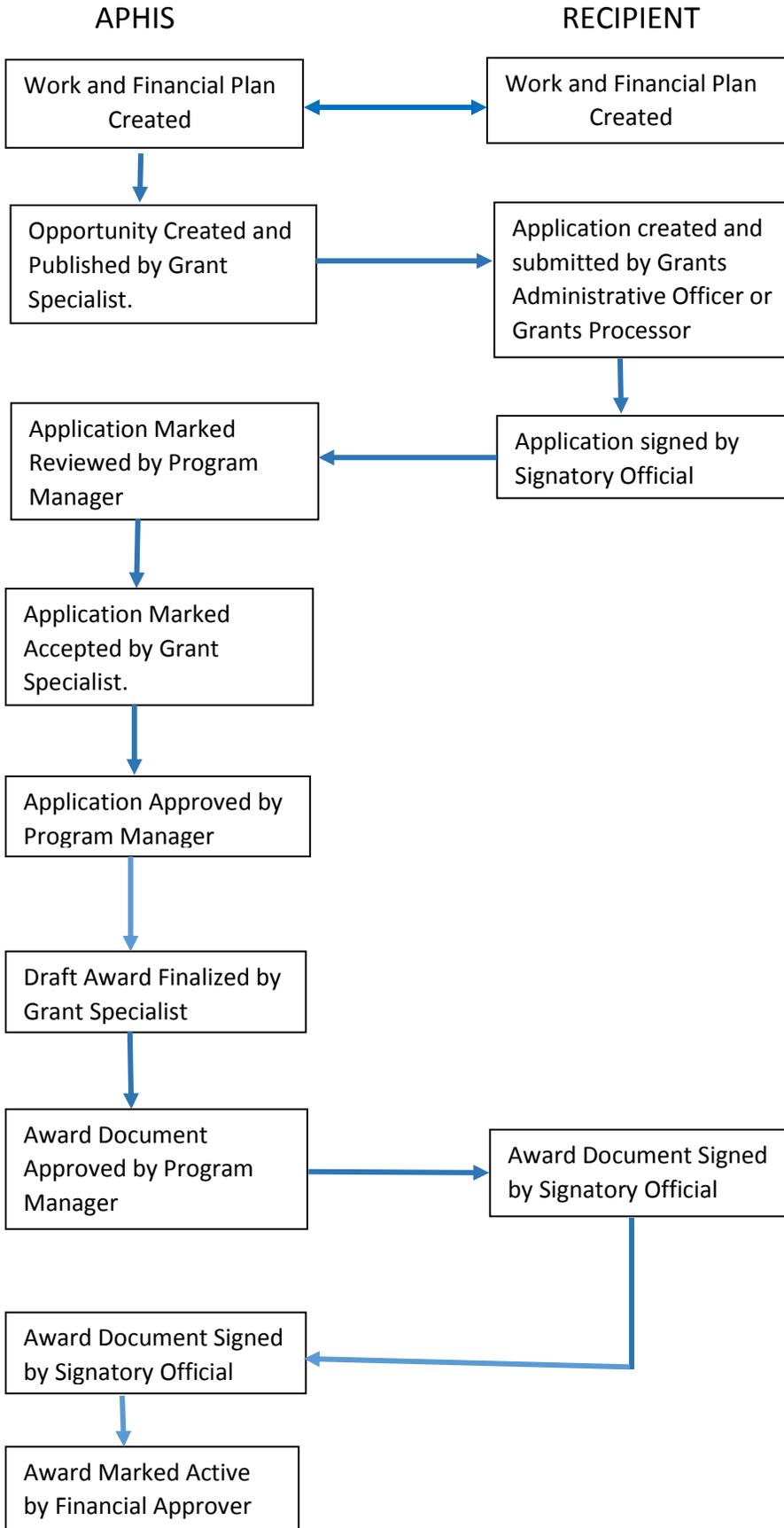
C = Create, U = Update
S = Search, D = Display

At the current time, Certifying Official is not a role in eFG appointed or denied by the GAO. Certifying Official is a designation that can be held by any recipient role in eFG.

For more comprehensive information see:

https://nfc.usda.gov/FSS/Training/Online/ezFedGrants/Resources/EP_User_Role_Definitions.pdf

Agreement Creation Workflow Diagram



Agreement Creation Workflow Narrative

- The work and financial plan is negotiated and approved by the ADODR and Recipient. The ADODR then submits the work plan to the APHIS Grant Specialist. **This is done outside of ezFedGrants**
- The APHIS Grant Specialist will use gathered information to create and publish the Opportunity to the appropriate Recipient. The Recipient GAO or Grants Processor then creates and submits the application to the Recipient Signatory Official.
- The Recipient Signatory Official signs and submits the application which advances in the work flow to the APHIS Program Manager who marks the Application Reviewed. This moves the Application to the Grant Specialist.
- The APHIS Grant Specialist then reviews and Accepts the application. The Application is then returned via workflow to the APHIS Program Manager.
- The Application is approved by the APHIS Program Manager and returned via workflow to the APHIS Grant Specialist in the form of a draft award.
- The APHIS Grant Specialist reviews and edits the Award document as necessary before marking it as Draft Finalized. The Award moves to the APHIS Program Manager.
- The APHIS Program Manager Approves the Award document moving it forward in the work flow to the Recipient Signatory Official. Upon Recipient signature the document moves forward in the workflow to the APHIS Signatory Official.
- The APHIS Signatory Official signs the document and it moves via the workflow to the APHIS Financial Approver.
- The award document is marked Active by the Financial Approver and the system sends notification of the active award along with a copy of the award face sheet.

Level 2 eAuthentication Account Creation

This provides details for external users (grant recipients & applicants) on requesting a USDA eAuthentication Level 2 Account, which is necessary for accessing the ezFedGrants System.

A valid government-issued photo ID and a valid e-mail address will be required to obtain the Level 2 Account for eAuthentication. Any one of the following IDs is acceptable:

- A driver's license issued by a US state or a province of Canada.
- A photo ID card issued by a US state or a province of Canada.
- A United States Military or United States Federal Government PIV/CAC (Smart) identification card.
- A valid passport issued by any country listed on the US Department of State website.

Once you have obtained a USDA Level 2 eAuthentication account, you may request access to the ezFedGrants External Portal. Please refer to the [ezFedGrants External Portal Access Request Submission Job Aid](#) for more information on submitting an access request.

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

Account Creation

Start the Account Creation by accessing the **USDA eAuthentication Home** screen using the following web address:
<https://www.eauth.usda.gov>

Click the **Create an Account** link.

The screenshot shows the USDA eAuthentication Home page. At the top, there is a navigation bar with links for Home, About eAuthentication, Help, Contact Us, and Find an LRA. Below the navigation bar, there is a green header with the text 'eAuthentication Home'. On the left side, there is a 'Quick Links' section with links for 'What is an account?', 'Create an account', and 'Update your account'. Below that is an 'Administrator Links' section with a link for 'Local Registration Authority Login'. The main content area has a 'Welcome' section with the following text: 'USDA eAuthentication is the system used by USDA agencies to enable customers to obtain accounts that will allow them to access USDA Web applications and services via the Internet. This includes things such as submitting forms electronically, completing surveys online, and checking the status of your USDA accounts. Please note that USDA will only accept eAuthentication Accounts from individuals. Currently USDA eAuthentication does not have the mechanism to issue accounts to businesses, corporations or other entities. To apply for a USDA eAuthentication Account, please visit the [Create an Account](#) Page.' The 'Create an Account' link is highlighted with a red box and a red arrow points to it from the text above.

If you already have an eAuthentication Level 1 Account, please refer to the information on the **Create an Account** screen for changing from Level 1 to Level 2 on the following page.

On the *Create an Account – Getting Started* screen, click the **Register for a Level 2 Account** button.

USDA United States Department of Agriculture
USDA eAuthentication

Home About eAuthentication Help Contact Us Find an LRA

You are here: [eAuthentication](#) > Account Creation

Create an Account - Getting Started

USDA Federal Employees, Contractors, & Affiliates
If you are a USDA Federal Employee, Contractor, or Affiliate of the USDA, you must register for a USDA Internal Account.

[Register for an Internal Account](#)

USDA Customers - What Level of Access Do You Need?

Request Level 1 Access to:

- Visit a USDA web page that indicates a Level 1 account is necessary
- Obtain general information about the USDA or its agencies
- Participate in public surveys for a USDA agency

[Register for a Level 1 Account](#)

Request Level 2 Access to:

- Submit official business transactions via the Internet
- Enter into a contract with the USDA
- Submit forms or applications for the USDA via the Internet

[Register for a Level 2 Account](#)

Changing from Level 1 Access to Level 2 Access
If you already have a Level 1 account and require Level 2 access:

On the **Step 1 of 4 – Level 2 Access Account Registration** screen, enter your information into the fields.

Fields in red with an asterisk are required. You will need to scroll down to view all of the fields.

You are here: [eAuthentication](#) > [Account Creation](#) > Account Request Form

Register for Your Account - Level 2

Form Approved OMB No. 0503-0014

Step 1 of 4 - Level 2 Access Account Registration

USDA customers should complete the information below to create a USDA eAuthentication account. Please read the eAuthentication [Privacy Act Statement](#) and [Public Burden Statement](#) for more information on how your personal information will be protected.

All required fields are red and marked by an asterisk (i.e. *). Enter your first and last name exactly as it appears on your Government issued photo ID (e.g. state driver's license).

Note: The characters < > ^ | are not allowed on this form.

User Information [?](#)

Required Field*

First Name*

Middle Initial

Last Name*

Address*

City*

State*

Zip/Postal Code*

Country*

Enter your first name as it appears on your current government issued picture ID

Once you have entered all of your information, click the **Continue** button at the bottom of the screen.

password. Each question may only be used once. For additional assistance, click the [?](#) above.

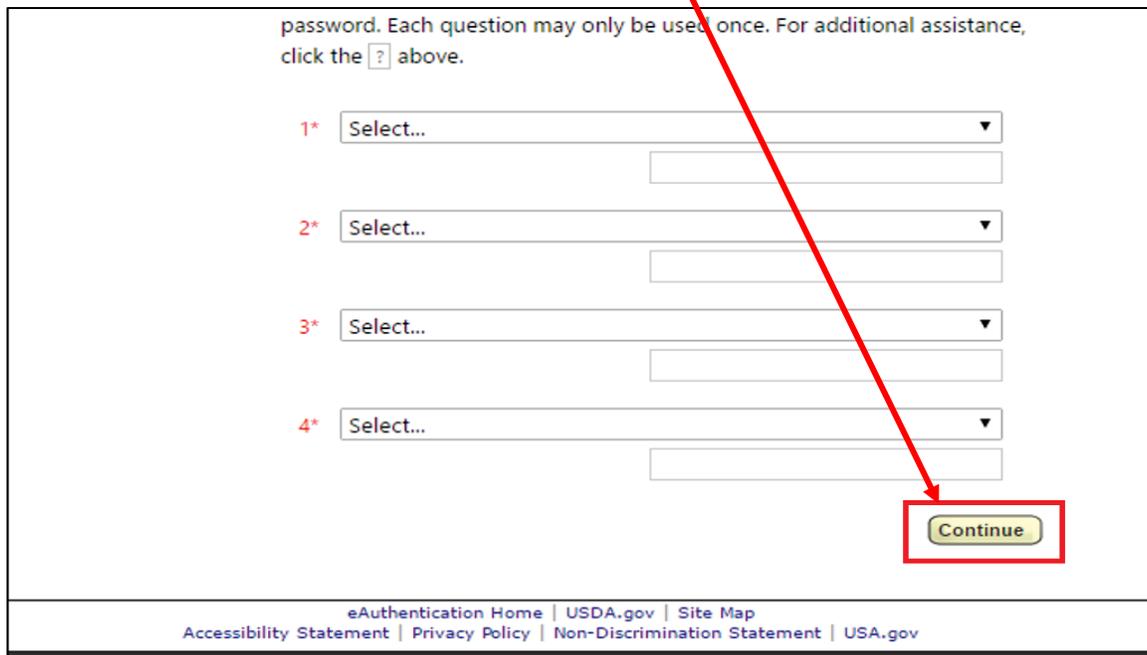
1*

2*

3*

4*

eAuthentication Home | USDA.gov | Site Map
Accessibility Statement | Privacy Policy | Non-Discrimination Statement | USA.gov



If any of the required fields have been left blank or are completed incorrectly, you will see an error message prompting you to rectify any blank or incorrectly completed fields.

On the **Step 2 of 4 – Level 2 Access Account Verification** screen, review the information to ensure that it is correct. Once you have confirmed that it is correct, click the **Submit** button at the bottom of the screen.

Quick Links

- What is an account?
- Create an account
- Update your account

Administrator Links

- Local Registration Authority Login

You are here: [eAuthentication](#) > [Account Creation](#) > [Account Request Confirmation](#)

Create an eAuthentication Account

Step 2 of 4 - Level 2 Access Account Verification

If this information is incorrect, please click the [edit](#) If the information is correct, please continue by clicking the submit button.

Verify User Information

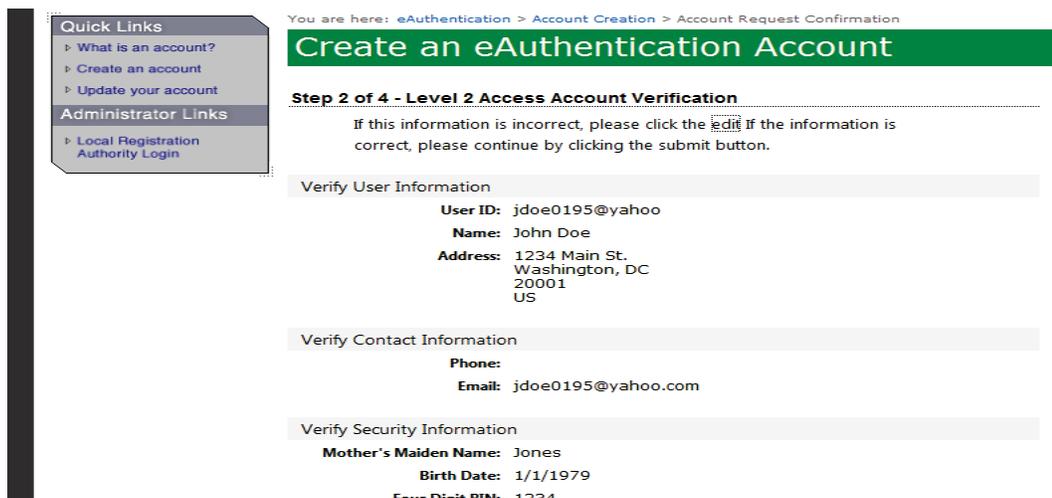
User ID: jdoe0195@yahoo
Name: John Doe
Address: 1234 Main St.
Washington, DC
20001
US

Verify Contact Information

Phone:
Email: jdoe0195@yahoo.com

Verify Security Information

Mother's Maiden Name: Jones
Birth Date: 1/1/1979
Four Digit PIN: 1234



If you need to make changes to the information, click the **Edit** button. **DO NOT** use the Internet Browser **Back** arrow.

Upon successful submission, the system will proceed to the **Step 3 of 4 – Print Confirmation email** screen. Here you will see a message explaining that you will receive an email with **instructions** for activating your eAuthentication Account and initiating the identity verification procedure necessary for Level 2 Access.

Quick Links
▶ What is an account?
▶ Create an account
▶ Update your account

Administrator Links
▶ Local Registration Authority Login

You are here: [eAuthentication](#) > [Account Creation](#) > [Account Request Confirmation](#)

Create an eAuthentication Account

Step 3 of 4 - Print Confirmation email

Account Created:

Your account has been created but you have one more step required to complete your registration!

Your confirmation email with the subject line, **"eAuthentication - Action Required - Instructions to Activate Your USDA Account With Level 2 Access"**, should arrive within 1 hour. Please follow the instructions in the email to complete step 4 of your registration.

eAuthentication Account Information:

User ID: jdoe0195@yahoo
Email: jdoe0195@yahoo.com

Level 2 access activation process:

1. Follow the instructions provided in the confirmation email
2. Visit the [eAuthentication web site](#)
3. Click on "Update Your Account" to verify your information.
4. Present your Government issued photo ID (e.g. state issued driver's license) to a USDA Local Registration Authority (LRA) for activation of your account with Level 2 access. [Find an LRA](#)

It may take up to 24 hours to receive the confirmation e-mail. Please check your spam or junk folder if you have not received this email after 24 hours.

Follow the instructions provided in the confirmation email to activate your eAuthentication Account.

The below email is an example only. The text of the email you receive may vary.

***** Please do not reply to this email. For assistance see below *****

Step 4 of 4 - Instructions to Activate Your USDA Account with Level 2 Access

Congratulations jdoe0195@yahoo, you have successfully created a USDA eAuthentication account.

Before you can use your account with Level 2 access you must do the following:

1. Please wait approximately 10 minutes from the receipt of this email before you activate your account with Level 2 access.
2. Click [ACTIVATE MY ACCOUNT](#)

NOTE: Once you click the activation link, you will have an account with limited access that allows you to review and manage your account information online.

3. Log in to review the account information you provided and ensure your first name, last name, and date of birth are correct by clicking on the [MODIFY MY CUSTOMER PROFILE](#) link.

NOTE: If your first name, last name, or date of birth do not match your government-issued photo ID, you will need to create another eAuthentication Level 2 account with a different User ID by clicking on the [REGISTER FOR YOUR LEVEL 2 ACCOUNT](#) link.

Once you have activated your account, you will need to confirm your first name, last name, and date of birth on your eAuthentication profile matches your government-issued photo ID.

Please click the **Update your account** link on the left side of the screen to confirm and verify.

Home | About eAuthentication | Help | Contact Us | Find an LRA

You are here: eAuthentication > Account Creation > Account Activation

Create an eAuthentication Account

Step 4 of 5 - Account Activated

Your account has been activated with Level 1 Access. Please wait 20 minutes from the time of activation before using the account.

eAuthentication Account Information:

User ID: [REDACTED]

Email: [REDACTED]

Additional Information

For additional information regarding your eAuthentication account, please review our Frequently Asked Questions.

- Click [here](#) to review our Frequently Asked Questions.

Step 5 of 5 - Identity Verification

To verify your identity for Level 2 Assurance, please select one of the

The final step is **Identity Verification** this is required to obtain a full Level 2 Access and to gain access to the ezFedGrants System. Identity verification can be completed online or by visiting a Local Registration Authority (LRA).

For more in-depth and comprehensive information follow this ezFedGrants Training link:
https://nfc.usda.gov/FSS/Training/Online/ezFedGrants/Resources/EP_Onboarding_Basics.pdf

Gaining Access to ezFedGrants ...How to get onboard.

Acquiring a level 2 eAuthentication account must occur prior to requesting access in ezFedGrants. If you do not have level 2 eAuthentication, navigate to www.eauth.usda.gov to set up level 2 eAuthentication, instructions for this process are on page 6 of this document.

Open the ezFedGrants website by either navigating to <http://grants.fms.usda.gov/> or by navigating to <http://nfc.usda.gov/ezfedgrants> and click **Launch ezFedGrants** as shown below.

USDA United States Department of Agriculture
Financial Shared Services

Home Services MyFSS

ezFedGrants / Client Services
ezFedGrants (eFG) Grants and Agreements System

ezFedGrants is the USDA solution that will let you apply for and manage USDA grants and agreements online. It's USDA's OMB Circular A-123 system of record for processing Federal financial assistance transactions.

Client Services Training I Want to ...

ezFedGrants Application

Get started with a new grant application, check a pending status, and more by logging into ezFedGrants.

Launch ezFedGrants

About ezFedGrants

DR. SMITH GRANT

ezFedGrants is the USDA solution that will let you apply for and manage

Either method of access will redirect you to the eAuthentication login page shown below. Enter your Level 2 eAuthentication user ID and password and click **LOGIN**.

USDA United States Department of Agriculture
USDA eAuthentication

login :
password :

Home About eAuthentication Help Contact Us Find an LRA

You are here: eAuthentication Home > eAuthentication Login

eAuthentication Login

LincPass (PIV) ?

CLICK HERE TO
LOG IN
WITH YOUR
LincPass (PIV)

User ID & Password ?

User ID:
Password:

I forgot my User ID | Password

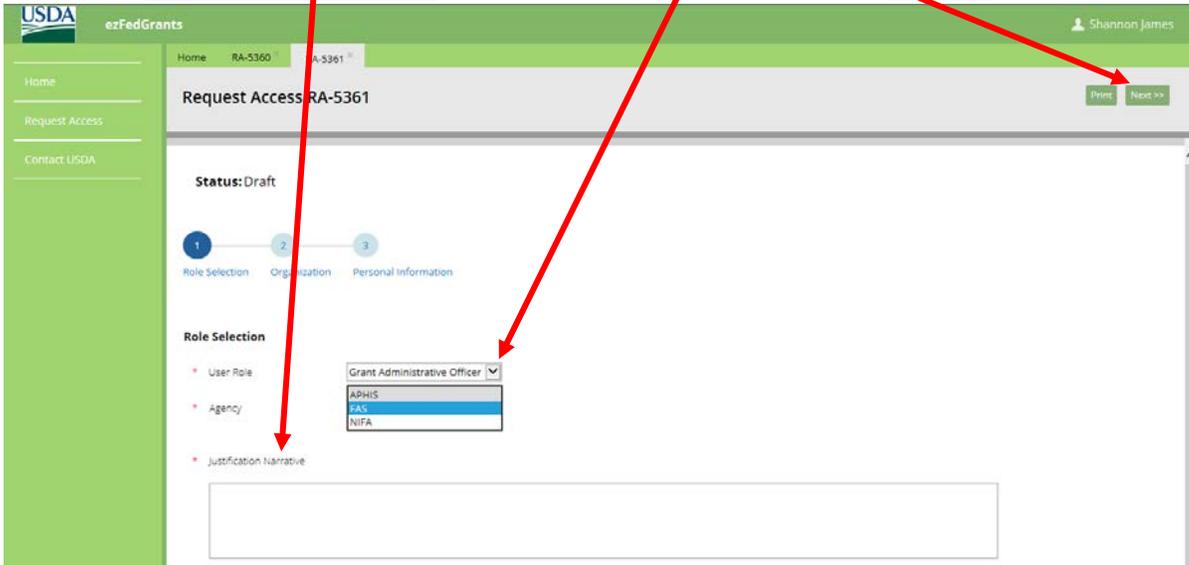
REGISTER LOGIN

Change my Password

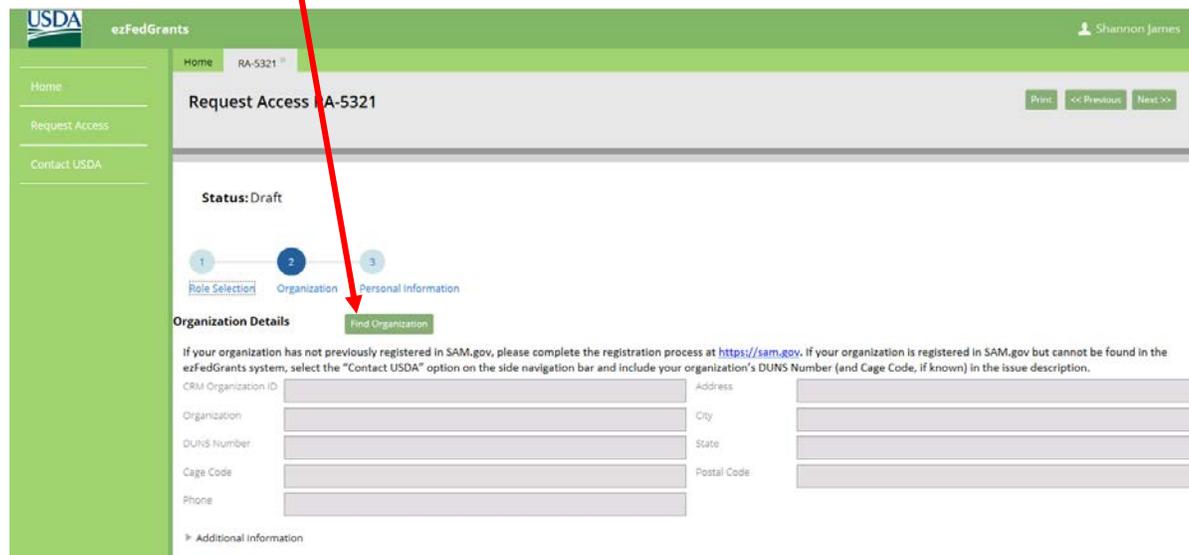
Successful eAuth login takes you to your ezFedGrants home page. Click **Request Access**. If you already have access to ezFedGrants, this option does not appear.



Using the arrow on the dropdown box, select your **User Role**.
Fill in your **Justification Narrative** for the role request and then click **Next >>**.



The next screen allows one to search for Organization Details. To auto populate the Organization Details fields, click **Find Organization**.



Use of the **DUNS Number** is the most specific identification available to search for your program, and is the recommended search item. If you are unsure of your DUNS Number, contact your Office of Sponsor Programs or Office of Grants and Agreements.

A popup box allowing entry of search criteria opens. Enter **Search Criteria** in any field to locate your organization and click **Search**.

Search Organization

Select Organization

Search Criteria

CRM Organization ID

City

Organization

State

DUNS Number

Postal Code

Cage Code

Country

Search Results

Additional Information

The resulting popup box will return all results for the entered search criteria. Scroll down the results and select **Join Organization** next to your organization.

Search Organization

Join Organization	MICHAEL FERGUSON FERGUSON FARMS	066339142	7U9C2	154 COUNTS RD	ELORA	TN
Join Organization	MIDDLE TENNESSEE STATE UNIVERSITY	077648780	1GNW9	1301 E MAIN ST	MURFREESBORO	TN
Join Organization	RONALD L BOLES BOLES FARM	080596374	7TXM2	3163 WINCHESTER HWY	ELORA	TN
Join Organization	TENNESSEE STATE UNIVERSITY	108814179	1E650	3500 JOHN A MERRITT BLVD	NASHVILLE	TN
Join Organization	TENNESSEE STATE UNIVERSITY INSTITUTE OF GOVERNMENT DEPT	827929589	6T730	3500 JOHN A. MERRITT BLVD	NASHVILLE	TN
Join Organization	TENNESSEE VALLEY TITLE INSURANCE CO.	831132220	5YC49	800 S. GAY STREET	KNOXVILLE	TN
Join Organization	UNITED SOUTH AND EASTERN TRIBES, IN C.	073221459	1NC46	711 STEWARTS FERRY PIKE S	NASHVILLE	TN
Join Organization	UNIVERSITY OF MEMPHIS, THE	055688857	0LSB5	THE UNIVERSITY OF MEMPHIS	MEMPHIS	TN
Join Organization	UNIVERSITY OF TENNESSEE TENNESSEE AGRICULTURE EXPERIEN	132891015	3GUF5	2621 MORGAN CIRCLE, 103 M	KNOXVILLE	TN
Join Organization	UNIVERSITY OF TENNESSEE UT AGRICULTURE EXTENSIONS SERVICE	134399448	3GUL8	2621 MORGAN CIRCLE 225 MO	KNOXVILLE	TN

Additional Information

The fields for the Organizational Details will populate. Verify the correct **DUNS Number** is listed. The DUNS number directs what account receives payments. If everything is correct, select **Next>>**.

USDA ezFedGrants

Home RA-5350

Request Access RA-5350

Status: Draft

1 Role Selection 2 Organization 3 Personal Information

Organization Details

If your organization has not previously registered in SAM.gov, please complete the registration process at <https://sam.gov>. If your organization is registered in SAM.gov but cannot be found in the ezFedGrants system, select the "Contact USDA" option on the side navigation bar and include your organization's DUNS Number (and Cage Code, if known) in the issue description.

CRM Organization ID	150017570	Address	P.O. BOX 40627
Organization	AGRICULTURE, TENNESSEE DEPARTMENT OF DIVISION OF ANIMAL INDUSTRIES	City	NASHVILLE
DUNS Number	124113291	State	TN
Cage Code	BKFK9	Postal Code	37204-0627
Phone			

By submitting this request, you are acknowledging that the DUNS Number listed in the record above corresponds to your organization's banking information. The incorrect DUNS Number, even if the address is correct, could misdirect payments.

Additional Information

The final step requires entering your POC contact information and your personal work contact information.

Your "POC" should be someone within your organization, often a supervisor, who can confirm the information and your need for access. The "Work Contact Information" section should be filled with your personal work contact details (not the POC).

Scroll down to fill the required fields and then click **Submit**.

USDA ezFedGrants

Home RA-5350

Request Access RA-5350

Status: Draft

1 Role Selection 2 Organization 3 Personal Information

POC Details

- * Organization: AGRICULTURE, TENNESSEE DEPARTMENT OF DIVISION OF ANIMAL INDUSTRIES
- * POC Email: shannon.s.james@aphis.usda.gov
- * School/Dept/Div/Prog: ezFedGrants Guide
- * POC Phone: (801)759-2200
- * Supervisory Point of Contact (POC): Dean

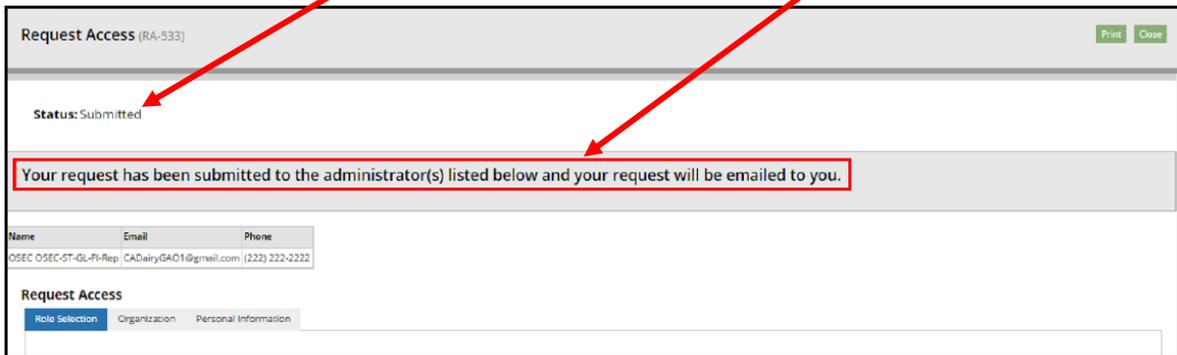
Work Contact Information

- Title: Mrs.
- Academic Title: Professor
- * First Name: Shannon
- * Middle Name:
- * Last Name: James

The value entered is not matching with the format (###) ###-####

Required fields are marked with a red asterisk.

If successfully submitted, the **Status** will show Submitted and a **confirmation banner** will appear verifying your request for access has been submitted.



The screenshot shows a web interface for "Request Access (RA-533)". At the top right, there are "Print" and "Close" buttons. Below the header, the status is displayed as "Status: Submitted". A red arrow points from the text "Status" in the introductory paragraph to this status. Below the status, a confirmation banner is displayed: "Your request has been submitted to the administrator(s) listed below and your request will be emailed to you." A red arrow points from the text "confirmation banner" in the introductory paragraph to this banner. Below the banner is a table with the following data:

Name	Email	Phone
OSEC OSEC-ST-GL-FL-Rep	CADairyGAO1@gmail.com	(222) 222-2222

Below the table, there is a "Request Access" section with three tabs: "Role Selection" (selected), "Organization", and "Personal Information".

If the GAO of your organization approves your request, you will receive a confirmation email and will be able to access your ezFedGrants home page and perform the tasks assigned to your role. If the reviewer rejects the request, a new request will need to be submitted. There may not be an email notification of request rejection.

Additional information may be found at: https://nfc.usda.gov/FSS/Training/Online/ezFedGrants/Resources/JA-Onboarding_Quick_Reference.pdf

Certification of Documents

Three documents require certification in eFG. A claim (SF270), the Federal Financial Report (SF425) and a Progress Report (SF PPR). The process for certifying each document is identical. One searches the Actionable Items and selects the appropriate Transaction ID, selects the Sign and Submit option, reviews the legal notice and then completes the signature.

This process is detailed below for certification of a claim (SF270). As noted, certification of each document follows the same path.

Claim Certification is an internal review of the created claim prior to submission to the awarding agency. The person designated as the Certifying Official after reviewing the submitted claim will either **Sign and Submit** which sends the claim to the awarding agency, **Return** which sends the claim back to the creator to edit, or **Cancel** which cancels and voids the claim altogether.

Once submitted by the claim creator, the claim will appear in the **Actionable Items** on the Certifying Official's ezFedGrants home page. Click **Actionable Items** to open the available actionable items.

The screenshot shows the ezFedGrants home page. On the left is a green sidebar with navigation links: Home, Opportunities, My Applications, My Agreements, My Amendments, My Claims, My Reports, Manage Permissions, and Contact USDA. The main content area has a top navigation bar with 'Home' and 'Create Claim'. Below this are five summary cards: Notifications (393), Actionable Items (74), Applications under Review (49), Amendments under Review (0), and Claims under Review (12). A red arrow points to the 'Actionable Items' card. Below the cards is a 'News and Notes' section with a table of recent posts. At the bottom is a 'My Agreements' section with a table of active agreements.

Title	Last Updated
Test	8/3/16 2:11 PM
Test Both	7/25/16 1:12 PM
Test External	7/25/16 1:12 PM
News and Notes Post - N03 ht	7/14/16 5:36 PM
News and Notes Post - N02	7/14/16 5:13 PM

FAIN	Status	Project Title	Recipient Contact Nar	Period of Performance	Total Federal Award Amou	Actions
		Africanized				

A popup box of all actionable items within the past 90 days will open. Depending on the quantity of items, you may need to advance to another results page by clicking the **page number** or **Next**.

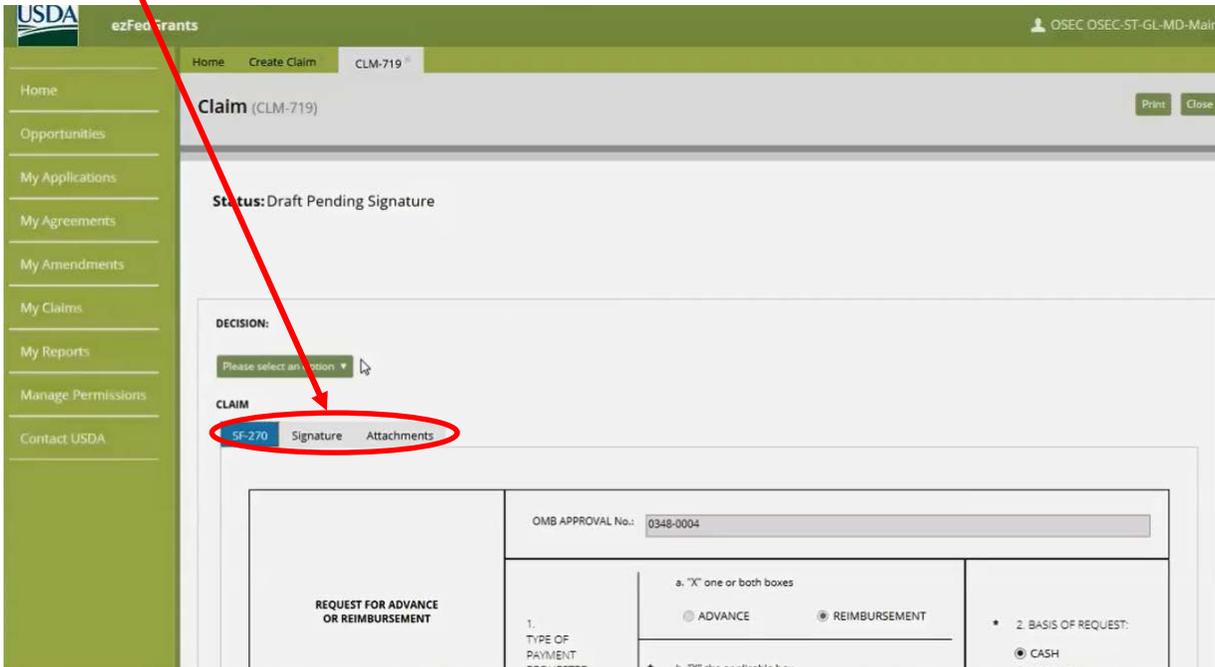
Transaction	Transaction ID	FAIN	Status	Due Date	Last Updated
Claim	CLM-719	AP16MRPBSXXXG001	Draft Pending Signature		10/11/16
Financial Report	AP1612-APPPQG020-FI-Annual-16	AP1612-APPPQG020	Draft Pending Signature	12/8/16	10/10/16
Financial Report	AP16PPQHXXX003-FI-SA2-16	AP16PPQHXXX003	Draft Pending Signature	9/29/16	10/10/16
Financial Report	AP1612-APPPQG020-FI-Annual-16	AP1612-APPPQG020	Not started	12/8/16	10/10/16
Claim	APHIS-CLM-68	AP1612-APISXC001	Acceptance Pending Edits		9/30/16
Claim	APHIS-CLM-67	AP1612-APISXC001	Acceptance Pending Edits		9/30/16
Claim	APHIS-CLM-58	AP1612-APISXC001	Acceptance Pending Edits		9/30/16
Performance Report	AP1612-APPPQG020-PE-Annual-16	AP1612-APPPQG020	Draft	12/8/16	9/27/16
Performance Report	AP1612-APPPQG020-PE-Annual-16	AP1612-APPPQG020	Draft	12/8/16	9/26/16
Application	APP-3966		Draft		9/21/16

If the item is more than 90 days old it can be viewed by clicking **View All Actionable Items**.

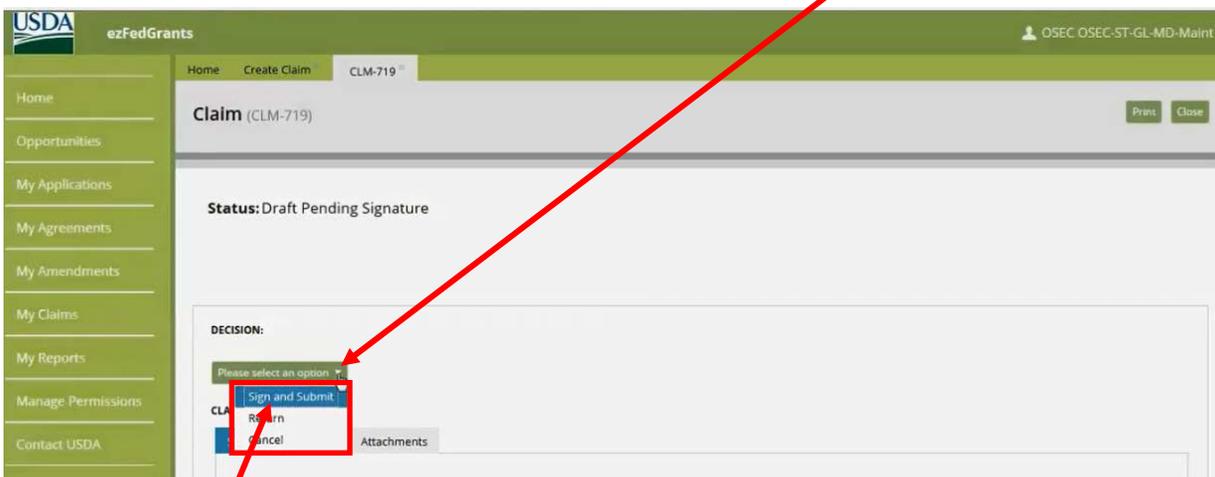
When the claim you intend to review is located, click on its **Transaction ID** to open.

Transaction	Transaction ID	FAIN	Status	Due Date	Last Updated
Claim	CLM-719	AP16MRPBSXXXG001	Draft Pending Signature		10/11/16
Financial Report	AP1612-APPPQG020-FI-Annual-16	AP1612-APPPQG020	Draft Pending Signature	12/8/16	10/10/16
Financial Report	AP16PPQHXXX003-FI-SA2-16	AP16PPQHXXX003	Draft Pending Signature	9/29/16	10/10/16
Financial Report	AP1612-APPPQG020-FI-Annual-16	AP1612-APPPQG020	Not started	12/8/16	10/10/16
Claim	APHIS-CLM-68	AP1612-APISXC001	Acceptance Pending Edits		9/30/16
Claim	APHIS-CLM-67	AP1612-APISXC001	Acceptance Pending Edits		9/30/16
Claim	APHIS-CLM-58	AP1612-APISXC001	Acceptance Pending Edits		9/30/16
Performance Report	AP1612-APPPQG020-PE-Annual-16	AP1612-APPPQG020	Draft	12/8/16	9/27/16
Performance Report	AP1612-APPPQG020-PE-Annual-16	AP1612-APPPQG020	Draft	12/8/16	9/26/16
Application	APP-3966		Draft		9/21/16

The claim information and attachments can be reviewed by selecting the appropriate tab **SF-270, Signature, and Attachments** for the document you wish to review.

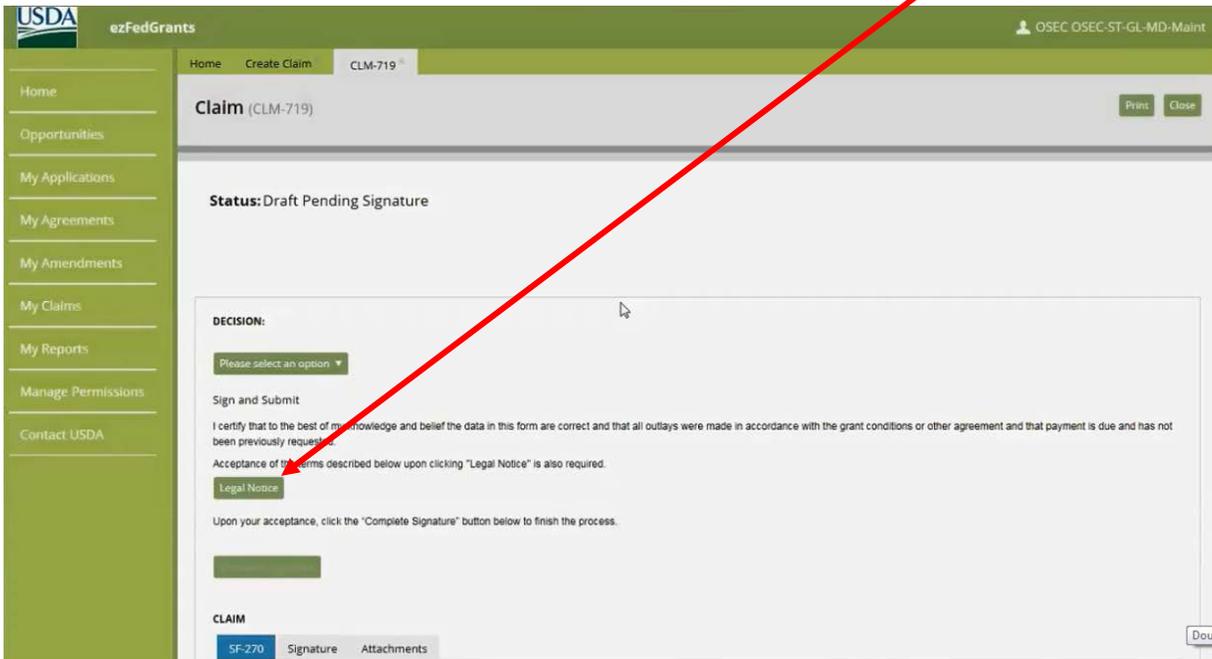


After completing review, the Certifying Official will click on the **Please select an option** drop box arrow under **DECISION:**



Select the **Sign and Submit** option.

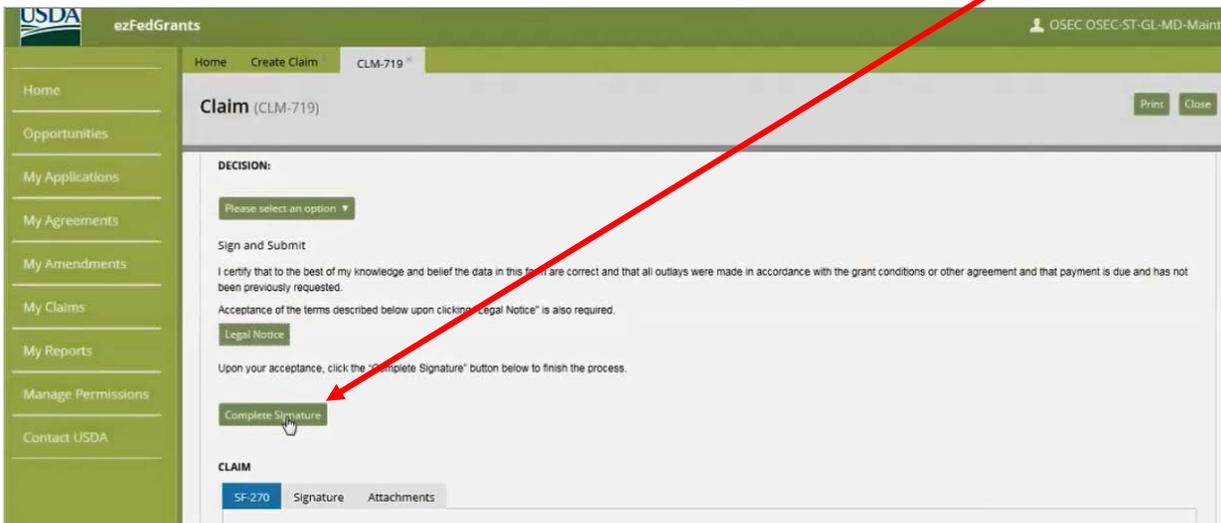
The Legal Notice button appears when the screen refreshes. Click the **Legal Notice** button to continue.



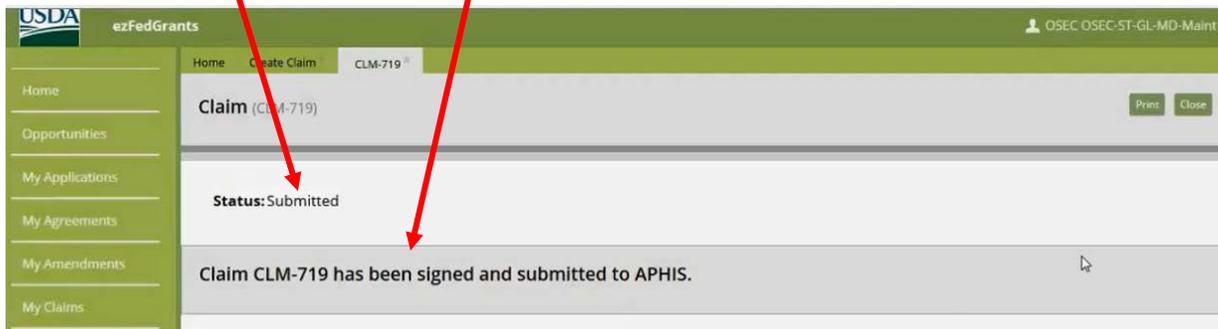
Scroll through the Legal Notice popup window to review the terms and conditions. At the bottom, click the **checkbox** for I agree with the listed Terms and Conditions, and then click **OK**.



Agreeing with the **Legal Notice** returns you to the **Claim** screen. Click the **Complete Signature** button.



The claim is now submitted to the awarding agency. Successful submission will be indicated by the Status changing to **Submitted** and a **confirmation banner** indicating the document is signed and submitted.



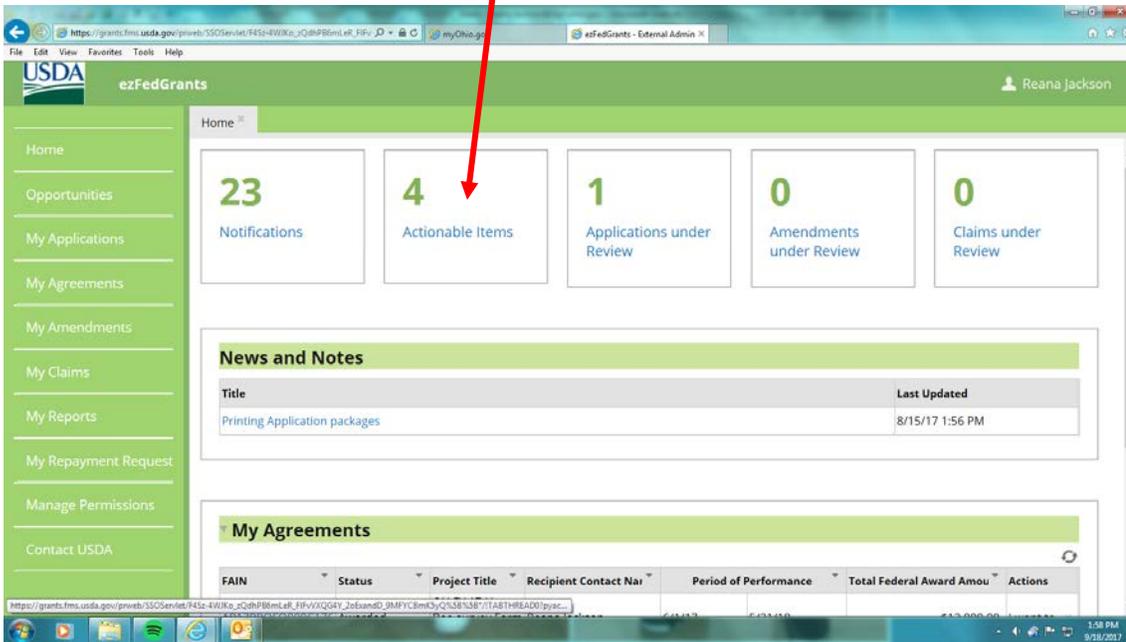
After successful submission to the awarding agency, the claim will no longer appear in the **Actionable Items** list.

A training module detailing claim creation and certification can be viewed at:

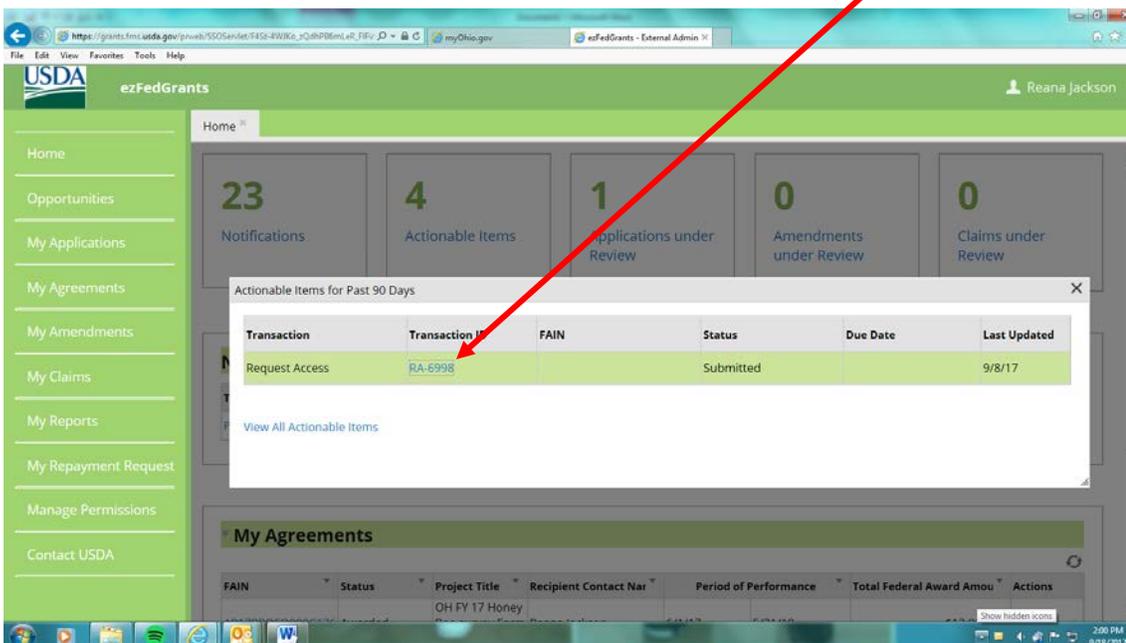
<https://www.aphis.usda.gov/mrpbs/fmd/downloads/Grantor-Implementation-Training/Module-6-Payment-Requests.mp4> .

How to Approve Access Request

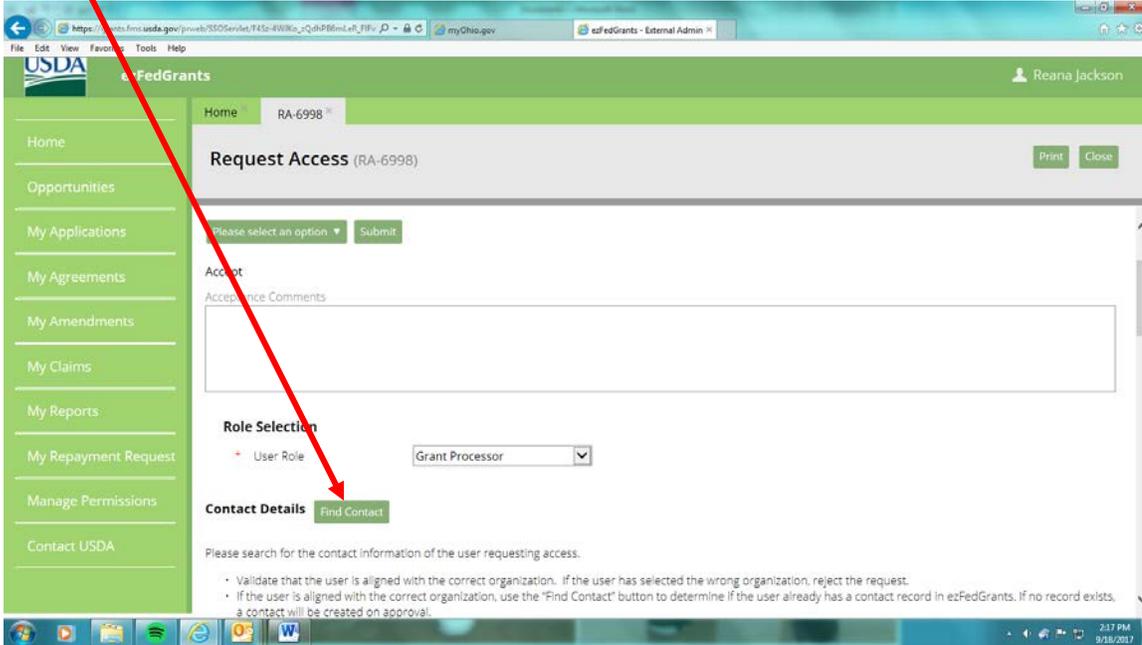
The role of Grants Administrative Officer (GAO) is the only role that has permissions to grant other user role requests for the recipient organization. Once receiving a level two eAuthentication a user must request access to the recipient organization. The workflow sends a notification of the request via email to the GAO. The GAO must enter eFG and click on the **Actionable Items** tile.



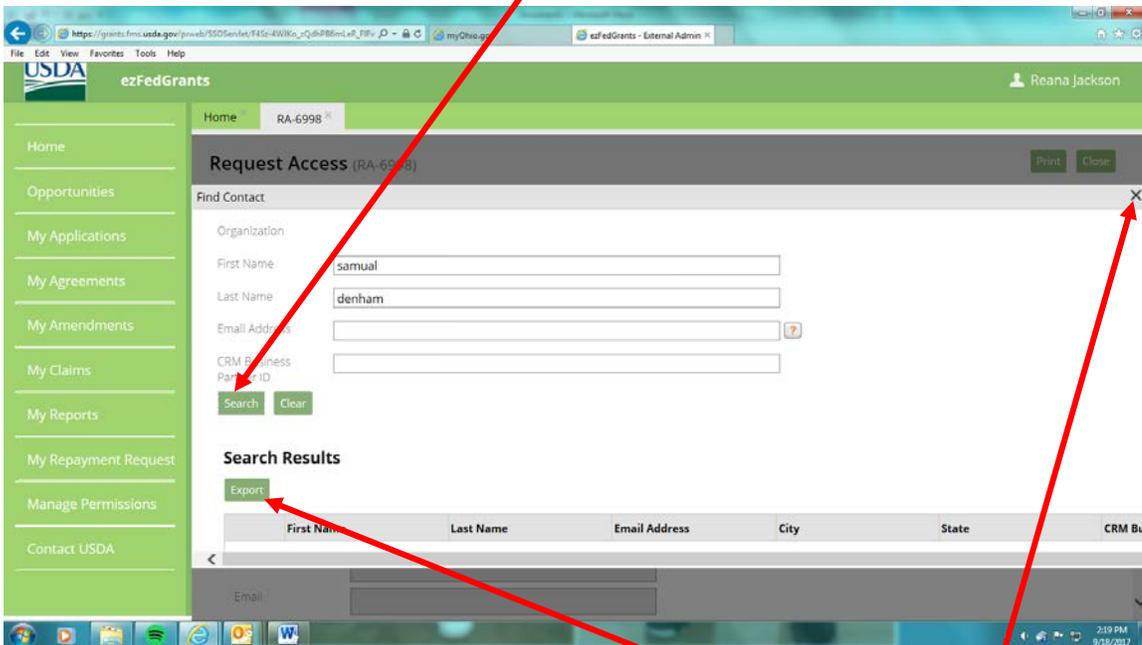
This will activate a popup box with all Actionable Items for the past 90 days. Search in the Transaction column for the item labeled "Request Access". Click on the adjacent **Transaction ID** number.



The Request Access Screen will appear. In order to assure that the person has not already been assigned access or previously had a contact established in eFG, you must click on the green **Find Contact** button near the bottom of the page.

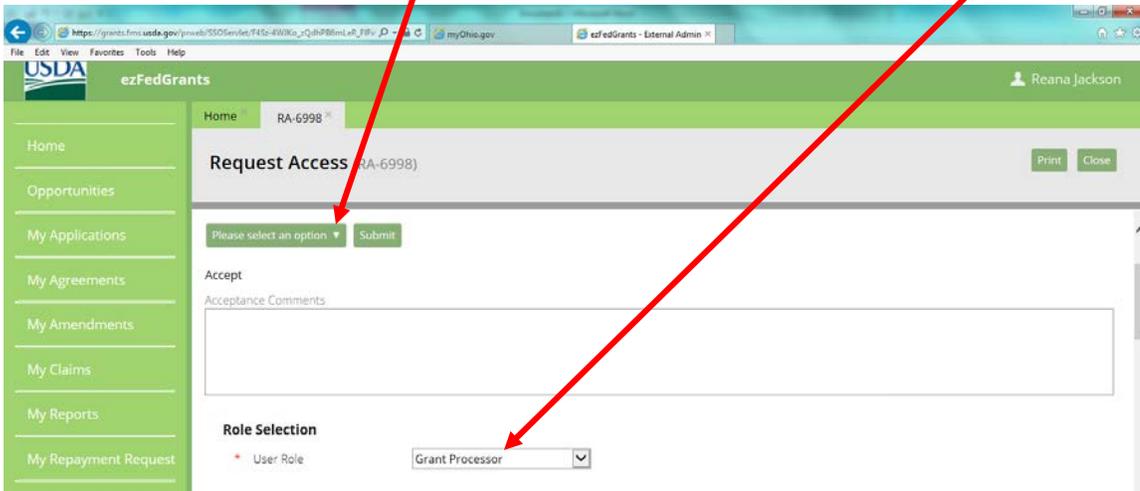


The Find Contact Search Screen will appear. Enter the first and last name of the person requesting access in the appropriate search boxes and click **Search**.

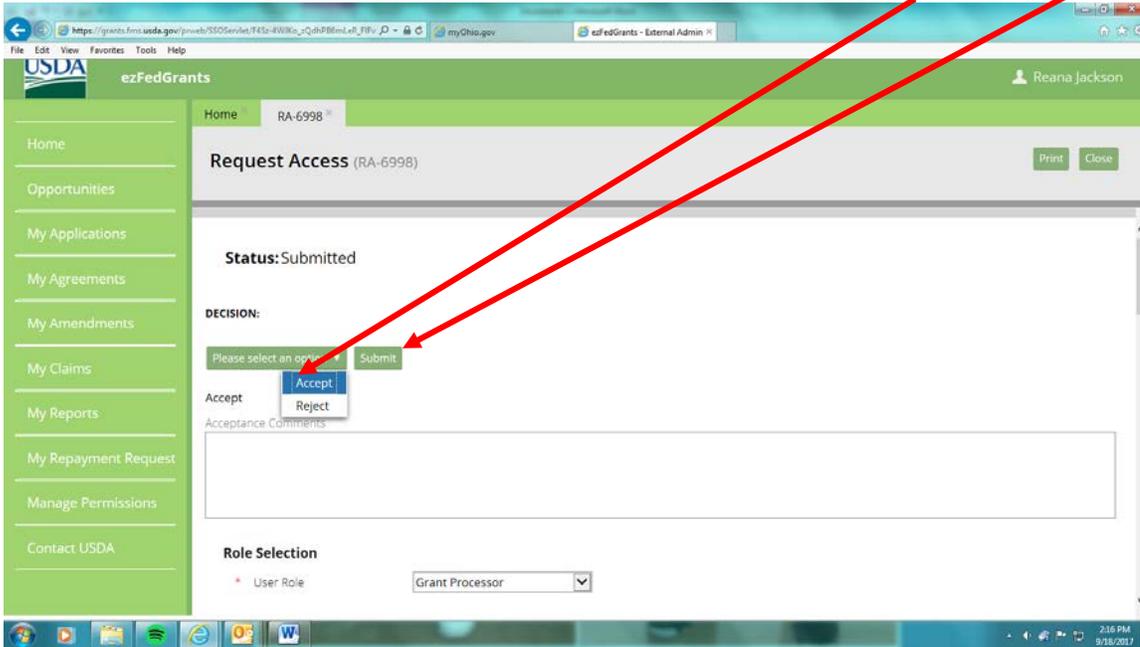


If contact information appears in the Search Results click **Export** and the information will be updated in system. In most instances no search results will appear. If this is the case, **X** out to clear the search results.

Once the contact information is confirmed make certain that the appropriate **user role** has been selected and then click on the green **Please Select an Option** button.



A drop down will appear with accept or reject. To accept the request click **Accept** then **Submit**.

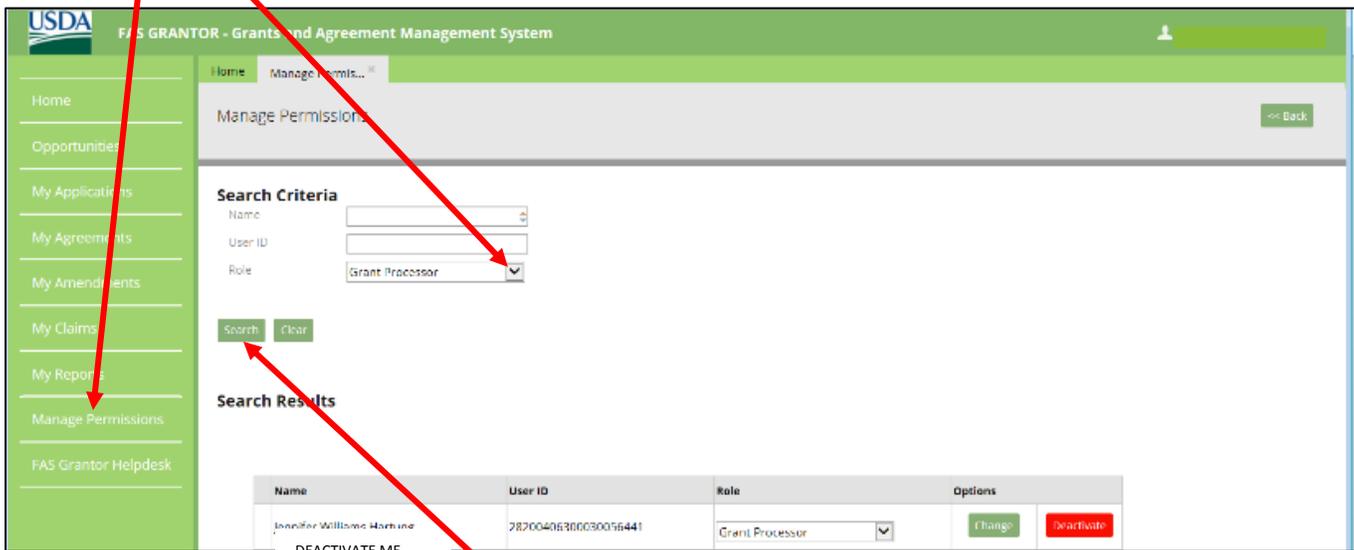


The requested role will now be active in your system.

How to Deactivate or Change Roles

The Manage Permissions navigation tab is unique to the Grants Administrative Officer role. This tab allows the GAO to change the role of any individual in the system (with the exception of their own role) or to deactivate the access of an individual.

Once the **Manage Permissions** tab is selected, the Search Criteria screen below will appear. To change the role or deactivate an individual the Name or User ID can be entered in the search criteria box. The third **search criteria box** allows one to select one of the three roles and it will return all individuals in your organization with that role.



USDA FAS GRANTOR - Grants and Agreement Management System

Home Manage Permits...

Manage Permissions << Back

Search Criteria

Name

User ID

Role Grant Processor

Search Clear

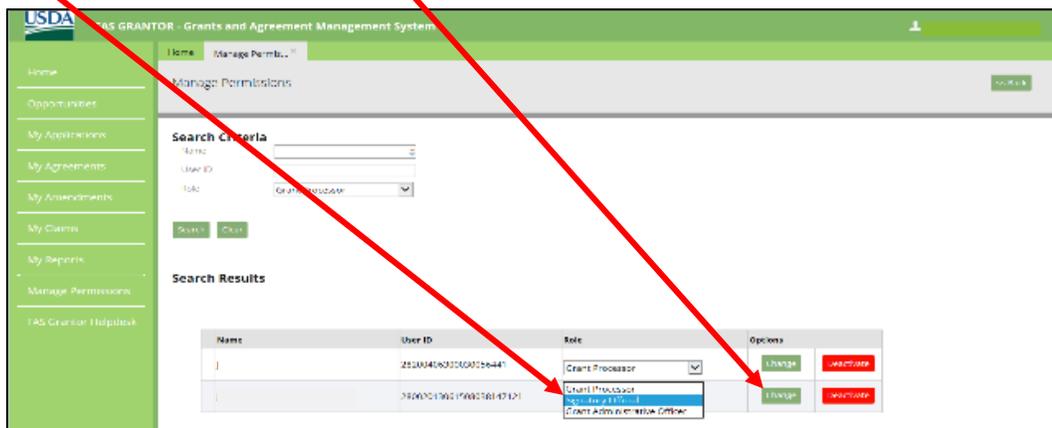
Search Results

Name	User ID	Role	Options
Jennifer Williams Harline DEACTIVATE ME	2820040630030056441	Grant Processor	Change Deactivate

To acquire the search results click the **Search** button.

In this example the role of grant processor was searched and two individuals were returned in the results. To change the role, click the dropdown arrow under Role for the individual you wish to change and select the role you wish the individual to have.

In this example the Grant Processor is being changed to a Signatory Official. To effect the change, click on **Signatory Official** and then the **Change** button.



USDA FAS GRANTOR - Grants and Agreement Management System

Home Manage Permits...

Manage Permissions << Back

Search Criteria

Name

User ID

Role Grant Processor

Search Clear

Search Results

Name	User ID	Role	Options
	2820040630030056441	Grant Processor	Change Deactivate
	2820040630030056441	Grant Processor	Change Deactivate

To deactivate an individual the GAO only has to click the red **Deactivate** button next to the individual to be deactivated.

The screenshot shows the 'Manage Permissions' page in the FAS GRANTOR system. The page includes a search criteria section with fields for Name, User ID, and Role (set to 'Grant Processor'). Below this is a search results table with two rows. The first row is for a user named 'DEACTIVATE ME' with User ID '28200406300030056441' and Role 'Grant Processor'. The second row is for a user named 'ROLE CHANGER' with User ID '28002013061508038147121' and Role 'Grant Processor'. Both rows have 'Change' and 'Deactivate' buttons. A red arrow points to the 'Deactivate' button for the 'DEACTIVATE ME' user.

Name	User ID	Role	Options
DEACTIVATE ME	28200406300030056441	Grant Processor	Change Deactivate
ROLE CHANGER	28002013061508038147121	Grant Processor Satisfactory Official Grant Administrative Officer	Change Deactivate

If an individual wishes to be reactivated they will need to request access again as outlined on page 12 of this document.

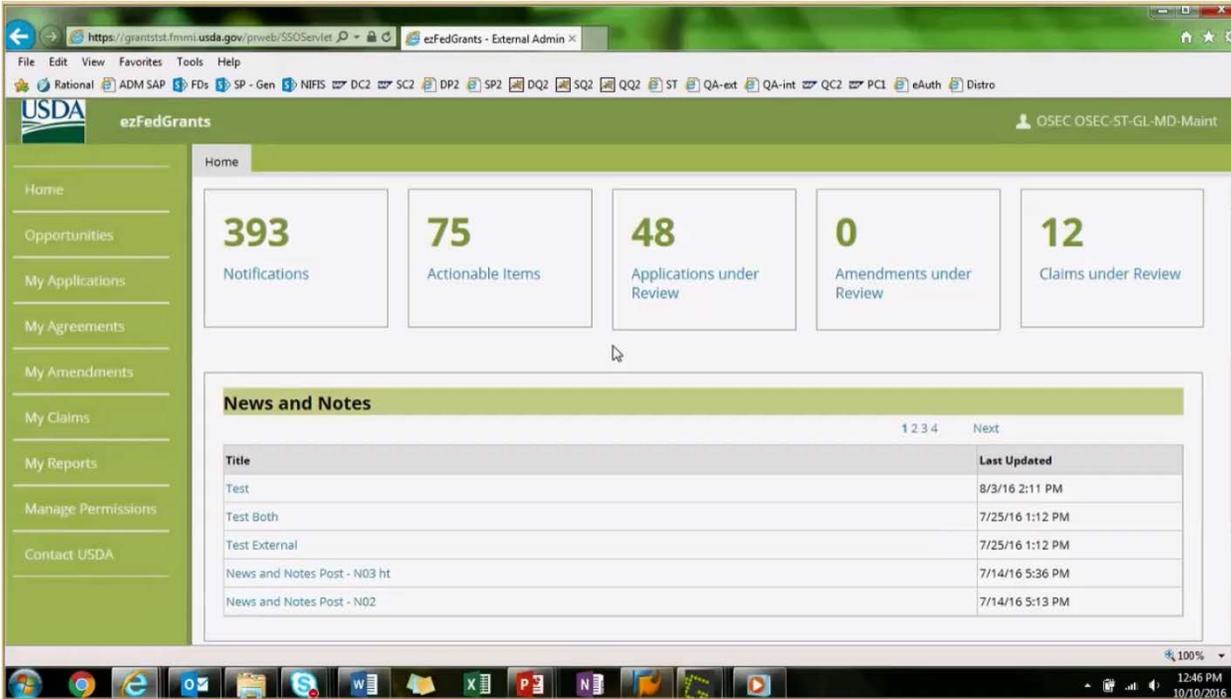
Additional information can be found at the following link:

https://nfc.usda.gov/FSS/Training/Online/ezFedGrants/Resources/JA-EP_User_Role_Management.pdf

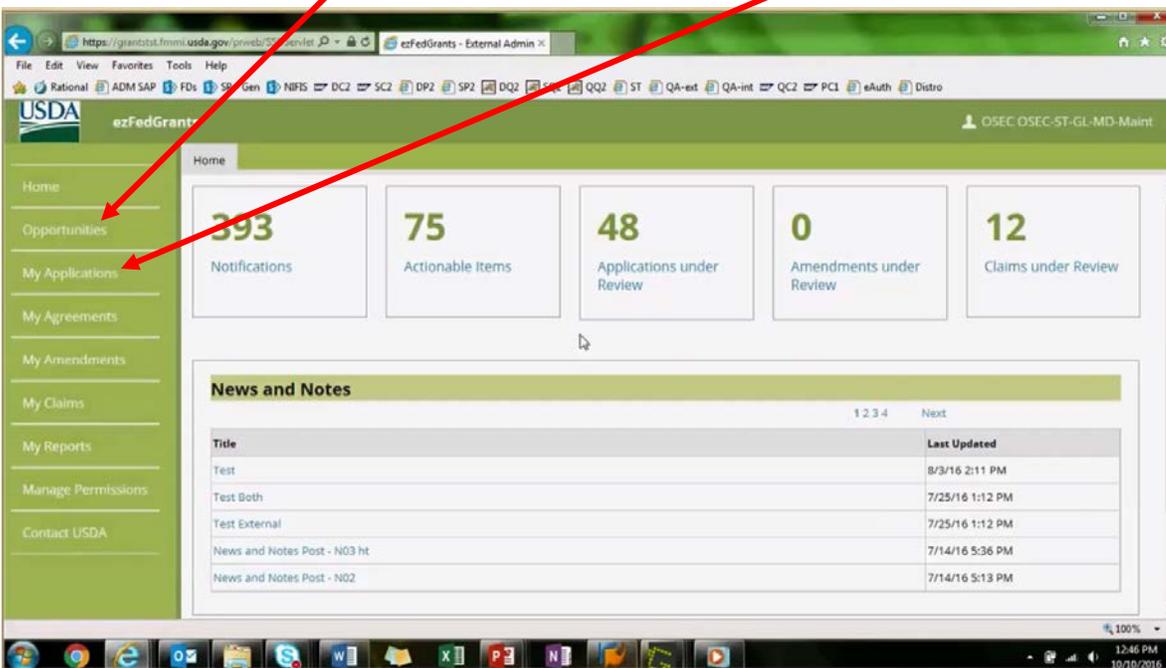
Application Creation – The application can be created by the Grants Administrative Officer (GAO) or the Grants Processor (GP).

Note: At the current time, the individual who begins the creation of an application must complete all steps and submit the application for signature. The system does not allow other users to update or edit the document.

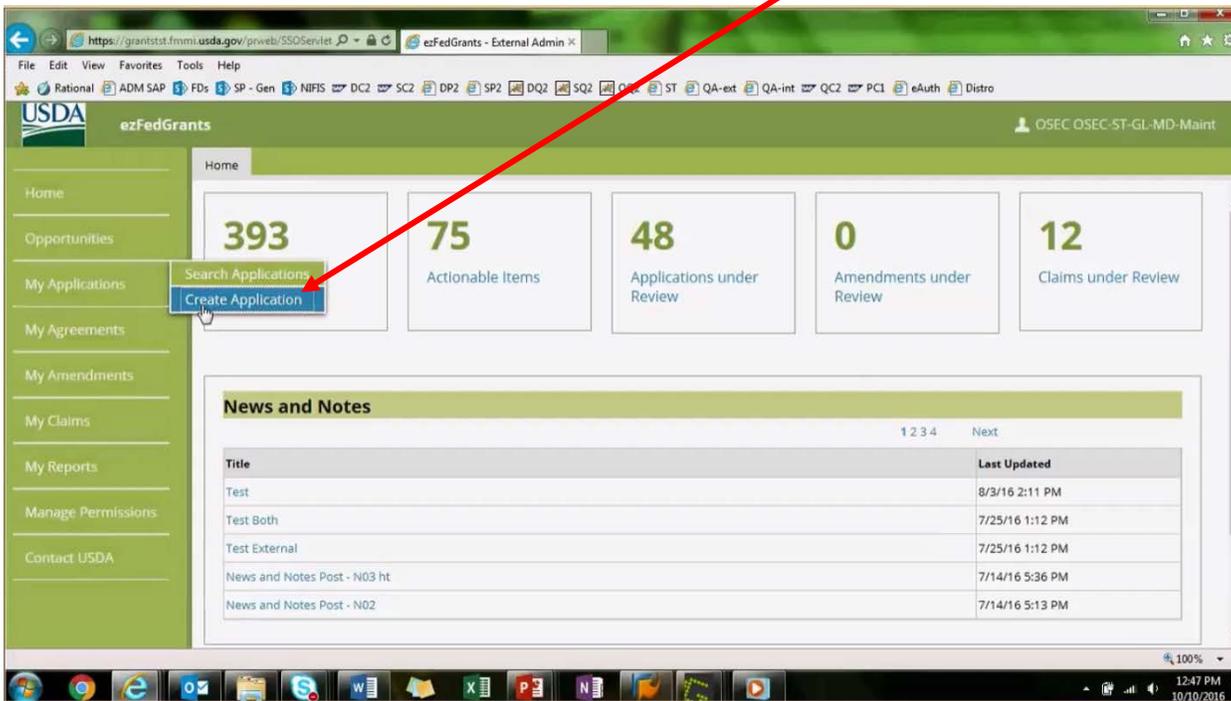
The first step to creating an application is to open eFG to your home screen.



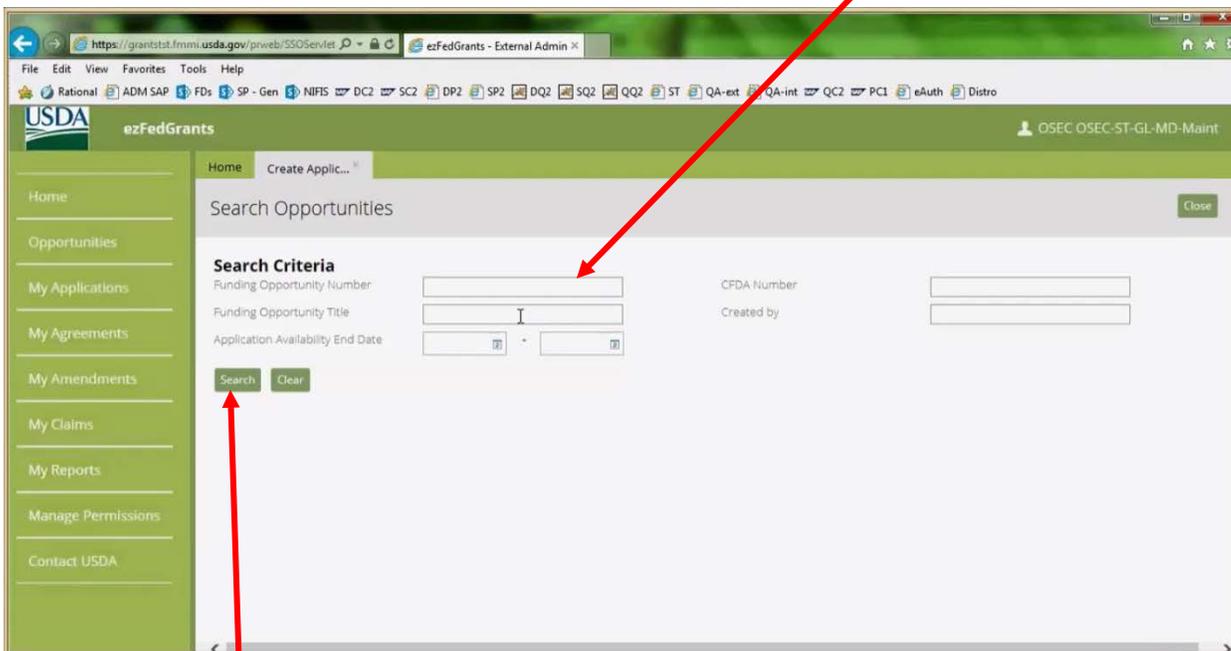
Locate the opportunity in which you would like to create the application against. This can be done in two ways. One can click on **Opportunities** link or click on the **My Applications** link.



If you click the My Applications link you will need to select **Create an Application**.

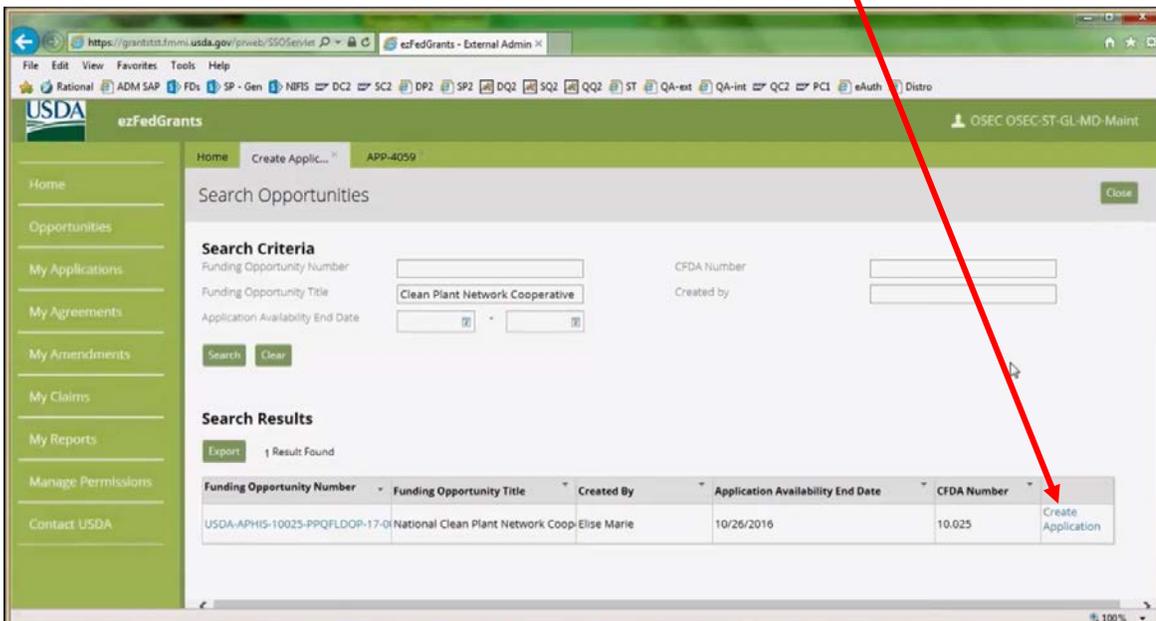


Either selection will take you to the Opportunity Search Screen. Though several different search criteria are available it is highly recommend that you copy and paste the **Funding Opportunity Number** provided in the notification email you received.



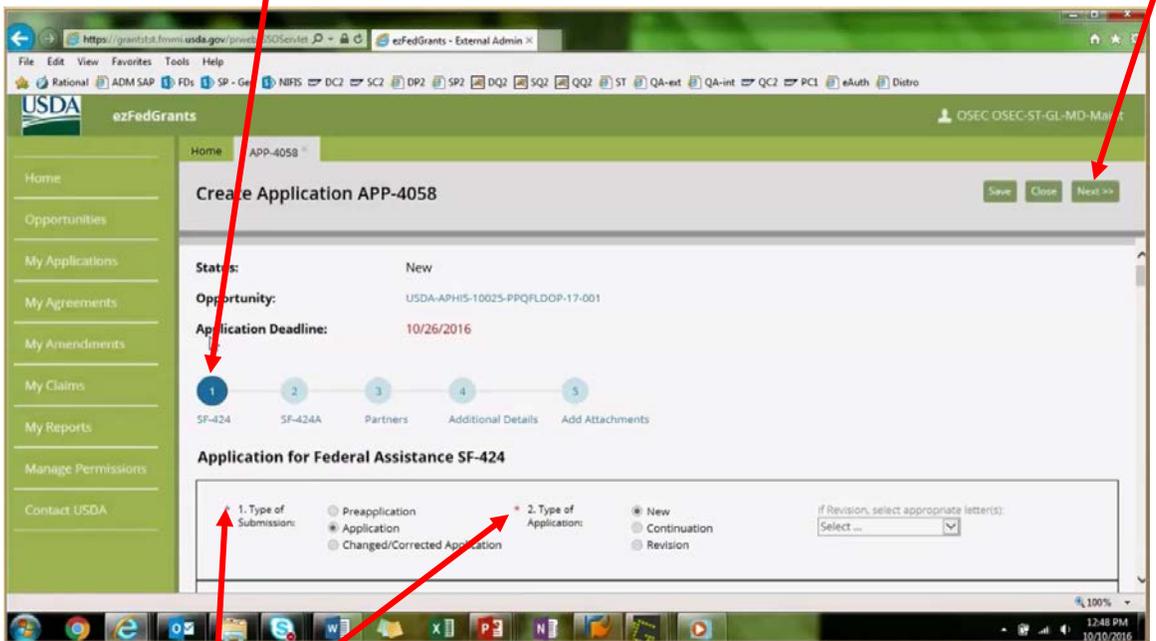
Next, click the **Search** button at the bottom of the Search Criteria.

This will result in the display of the Search Results below the Search Criteria fields. One or more records will be displayed. Find the appropriate record and select the **Create Application** link at the far right of the displayed results.



NOTE: One may review the opportunity by clicking on the link under **Funding Opportunity Number** but you must return to the **Create Application** link to enter data for the application.

The Create Application screen will launch in a new tab at the top of the screen. Note the five blue circles across the screen. These are referred to as breadcrumbs. You may access any component of the application by clicking on the **blue dot**. You may also navigate to the next breadcrumb by clicking **Next >>**.



Note the small **red asterisk**. These are required fields for application submission. You must make an entry for all required fields throughout the application.

All fields that are greyed out are either system generated or not applicable.

The first two breadcrumbs are electronic likeness to the SF424 and SF424a. As shown on the previous screen shot all mandatory fields are marked with a red asterisk and must have an entry.

Note: Several issues exist in the SF424 that will be corrected on future releases of eFG. Please note the following:

1. Box 2 – Type of Application – defaults to “New” and cannot be changed.
2. Box 8 b. – Employer/Taxpayer identification Number (EIN/TIN) – the system denotes this as a mandatory field but will not allow an entry.
3. Box 19 – Is Application Subject to Review By State Under Executive Order 12372 Process? – This field defaults to c. – Program is not covered by E.O. 12372 – and cannot be changed. If your program is covered by E.O. 12372 please attach a copy of your letter in breadcrumb 5 of this application.

The screen shot below shows only the beginning of the SF424. The entirety of the form can be accessed by scrolling down the page. Remember, all fields with the red asterisk are mandatory fields and an entry must be made. Note that box 21 is greyed out and the information in this section will be auto populated when delivered to the Signatory Official. When all fields have been completed, navigate to the next component by clicking the **#2 blue dot** or **Next >>**.

USDA ezFedGrants Create Application External User

Home Opportunities x APP-123 x

Create Application APP-123 Save Cancel Next >>

Status: New
Opportunity: USDA-AP-10.025-PPQ-FO-17-0001
Application Deadline: 05/31/2017

1 SF-424 2 SF-424A 3 Partners 4 Additional Details 5 Add Attachments

Application for Federal Assistance SF-424

1. Type of Submission: Preapplication Application Changed/Corrected Application

2. Type of Application: New Continuation Revision

If Revision, select appropriate letter(s):

3. Date Received:

4. Applicant Identifier:

5a. Federal Entity Identifier:

5b. Federal Award Identifier:

STATE USE ONLY:

6. Date Received by State:

7. State Application Identifier:

As with the previous screen shot, this screen shot only shows the beginning of the SF424a. The entirety of the form may be accessed by scrolling down the page.

Note: The training referenced at the end of this work aid states the only required field for the SF424a is the first row of the first table. **APHIS requires the Object Class Categories in Row 6 a. through k. be completed, including the entry of \$0 in any line item if appropriate.**

Once all entries have been made on the SF424a, navigate to the next component of the application by clicking the **#3 blue dot** or **Next >>**.

Application for Federal Assistance SF-424A

BUDGET INFORMATION: Non-Construction Programs						
SECTION A: BUDGET SUMMARY						
Grant Program Function or Activity	Catalog of Federal Domestic Assistance Number (b)	Estimated Unobligated Funds				Total (g)
		Federal (c)	Non-Federal (d)	Federal (e)	Non-Federal (f)	
* 1. <input type="text"/>	<input type="text"/>			<input type="text"/>	<input type="text"/>	\$0.00
2. <input type="text"/>	<input type="text"/>			<input type="text"/>	<input type="text"/>	\$0.00
3. <input type="text"/>	<input type="text"/>			<input type="text"/>	<input type="text"/>	\$0.00
4. <input type="text"/>	<input type="text"/>			<input type="text"/>	<input type="text"/>	\$0.00
Totals				\$0.00	\$0.00	\$0.00

The third component of the application is Partners.

Note: Partners must be registered in the system to be included on the application. A minimum of one Administrative Contact and one Program Contact must be entered. These selections will drive who will receive actionable items to complete financial and accomplishment reporting after the award is active.

Selection of a Signatory Official is not mandatory. If a Signatory Official is selected, only that individual will receive the application in the **Actionable Items** for signature. If no Signatory Official is selected, all Signatory Officials will receive notification of the application to be signed and only one may act upon it.

To enter a partner, begin typing the name of the individual in the **box**. A dropdown matching the names in the system will appear for your selection. If the individual does not appear in the dropdown s/he is not registered in the system.

USDA ezFedGrants Create Application External User

Home Opportunities x APP-123 x

Create Application APP-123 Save Cancel << Previous Next >>

Status: New
Opportunity: USDA-AP-10.025-PPQ-FO-17-0001
Application Deadline: 05/31/2016

1 SF-424 2 SF-424A 3 Partners 4 Additional Details 5 Add Attachments

Select a partner by typing in the name of the individual in the box. Matching names will appear in a dropdown box for your selection. A Signatory Official is not a required Partner; however, if no Signatory Official is identified, then the agency will send notifications and actionable items to all Signatory Officials associated to your organization.

* Primary Administrative Contact [dropdown] Clear
Secondary Administrative Contact [dropdown] Clear
* Primary Program Contact [dropdown] Clear
Secondary Program Contact [dropdown] Clear
Primary Authorized Representative [dropdown] Clear
Secondary Authorized Representative [dropdown] Clear
Primary Signatory Official [dropdown] Clear
Secondary Signatory Official [dropdown] Clear

Once the partners are entered, proceed to the next breadcrumb by clicking on the **breadcrumb 4** or **Next >>**.

USDA ezFedGrants Create Application External User

Home Opportunities x APP-123 x

Create Application APP-123 Save Cancel << Previous Next >>

Status: New
Opportunity: USDA-AP-10.025-PPQ-FO-17-0001
Application Deadline: 05/31/2016

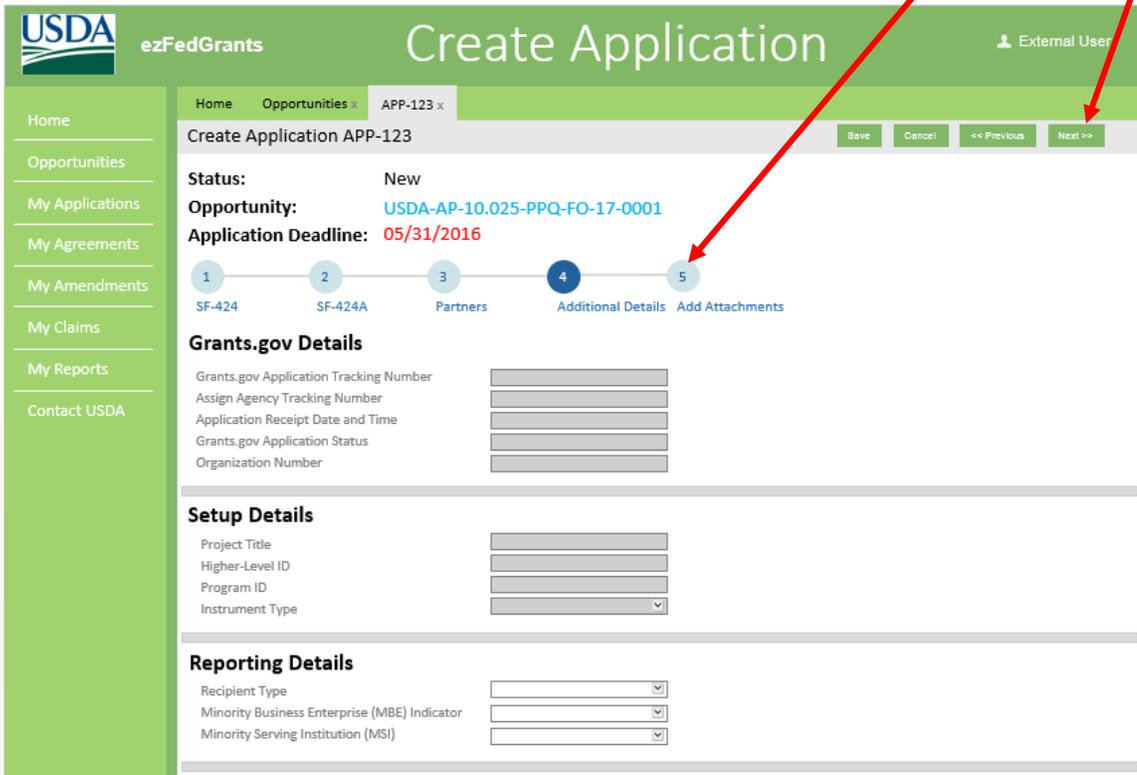
1 SF-424 2 SF-424A 3 Partners 4 Additional Details 5 Add Attachments

Select a partner by typing in the name of the individual in the box. Matching names will appear in a dropdown box for your selection. A Signatory Official is not a required Partner; however, if no Signatory Official is identified, then the agency will send notifications and actionable items to all Signatory Officials associated to your organization.

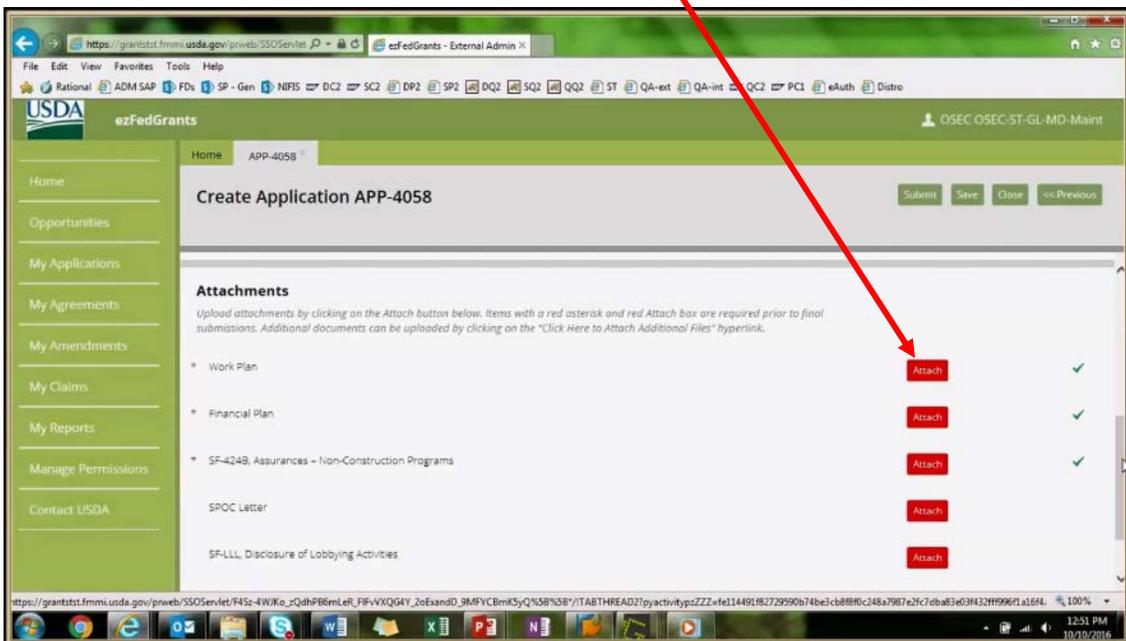
* Primary Administrative Contact [dropdown] Clear
Secondary Administrative Contact [dropdown] Clear
* Primary Program Contact [dropdown] Clear
Secondary Program Contact [dropdown] Clear

Breadcrumb 4 contains a considerable amount of information that is prepopulated. Some FFATA information is requested. Be sure to make entries in all fields with the red asterisk. The full form can be accessed by scrolling down the page.

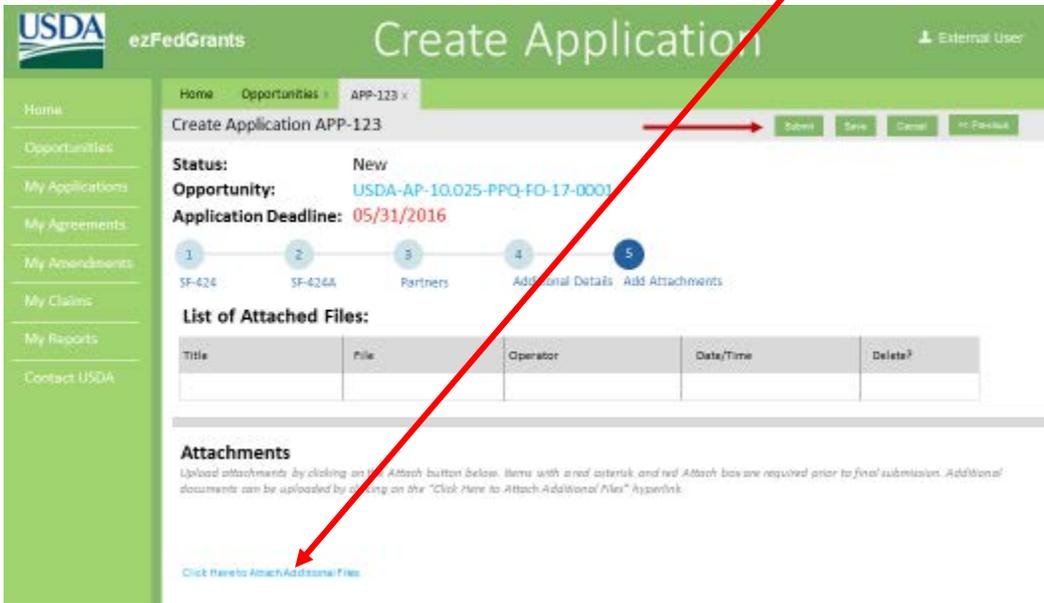
The final component of the application can be accessed by clicking **breadcrumb 5** or **Next >>**.



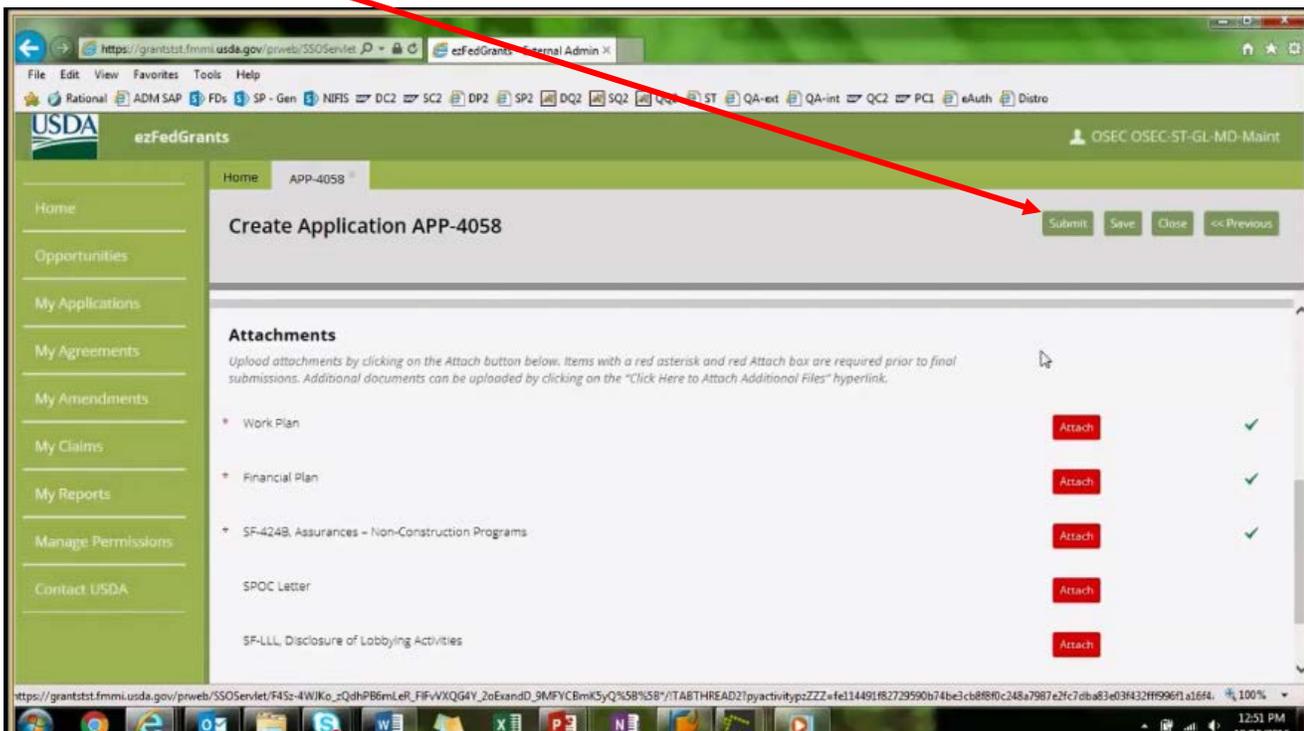
Mandatory attachments are indicated by a red asterisk but you may attach additional documents as needed. To upload the listed documents, click on the red **Attach** button.



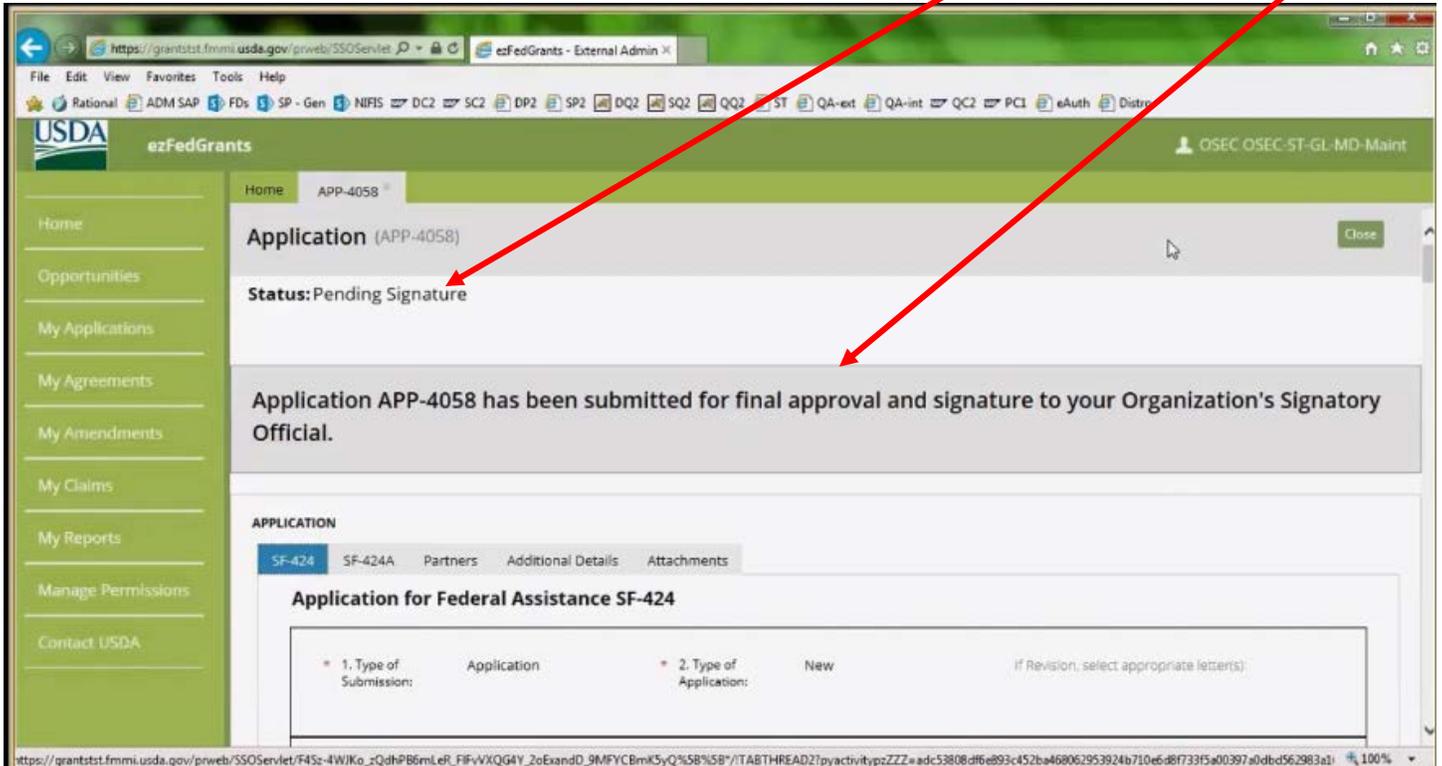
Additional documents may be uploaded by using the [Click Here to Attach Additional Files](#) link at the bottom of the page.



Once all documents have been uploaded, you will note the addition of the **Submit** button at the top right of the page. Click the **Submit** button to advance the application in the work flow to the Signatory Official.



After clicking the submit button, your screen will show the Status updated to **Pending Signature** and a **banner** across the page stating your application has been submitted to the Signatory Official(s).



The creation of the application is now complete and your signatory official(s) will be notified the document is ready for their review and signature.

For additional information see:

<https://www.aphis.usda.gov/mrpbs/fmd/downloads/Grantor-Implementation-Training/Module-2-Application-Creation.mp4> .

Claim Creation

Request for Reimbursements - SF270 Creation – Claim Creation are different terms for the same process that you may see in eFG documents.

Prerequisites:

- Agreements must be in **Active** status to submit a claim.
- A claim cannot be submitted for an agreement with open or overdue performance or financial reports.
- Previously created claims must be submitted to the awarding agency or cancelled before additional claims can be entered for the same agreement.

To create a claim, a Grants Processor (GP) or Grants Administrative Officer (GAO) role holder will navigate to their ezFedGrants home screen and then go through one of the following two paths to initiate a claim. Either click on **My Claims** or **My Agreements**. The My Agreements path is detailed first.

The screenshot shows the ezFedGrants home screen. The navigation menu on the left includes Home, Notifications, Opportunities, My Applications, My Agreements, My Amendments, My Claims, My Reports, Manage Permissions, and Contact USDA. The main content area shows a dashboard with five summary cards: Notifications (32), Actionable Items (18), Applications under Review (1), Amendments under Review (0), and Claims under Review (0). Below the dashboard is a 'News and Notes' section with a table of updates. At the bottom, a 'My Agreements' button is highlighted with a red arrow pointing to it from the left navigation menu.

“My Agreements” path to claim generation: Upon selection of My Agreements a listing of all agreements available for reimbursement will appear. Scroll down to the desired agreement and click the **arrow** in the Actions column labeled “I want to”.

FAIN	Status	Project Title	Recipient Contact Name	Period of Performance	Total Federal Award Amount	Actions
AP1612-APPPQC006	Awarded	Africanized Honeybees in the Plains	OSEC OSEC-ST-GL-App	7/12/16 - 8/2/16	\$99,000.00	I want to
AP1612-APPPQC007	Awarded	National Veterinary Accreditation Prog.	OSEC OSEC-ST-GL-App	7/18/16 - 8/31/18	\$170,000.00	I want to

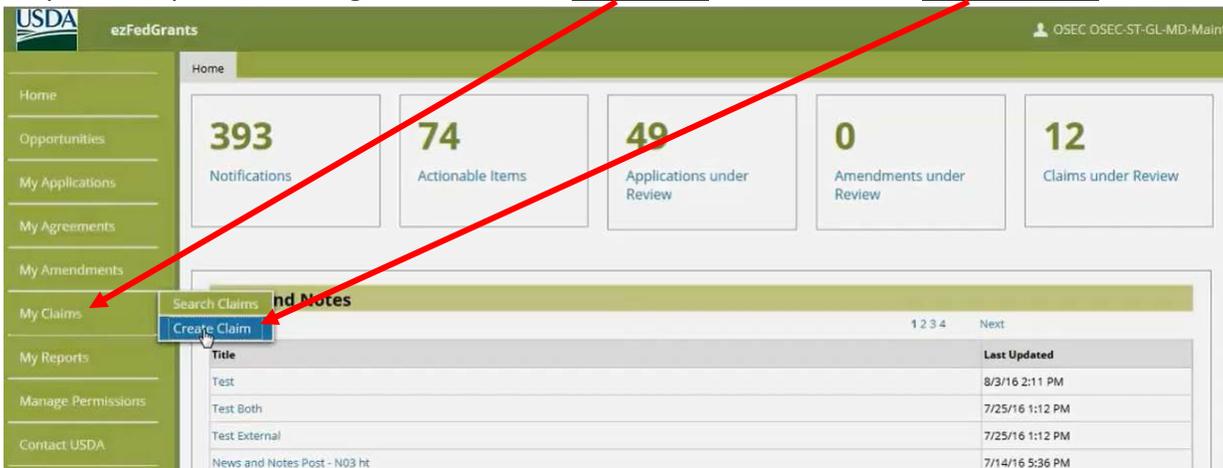
From the dropdown box select **Create Claim**.

The screenshot shows a close-up of the 'I want to' dropdown menu. The menu options are: View Agreement Details, View Amendments, View Federal Award Document, View Claims, Create Claim (highlighted with a red box and a red arrow), and View Reports.

The Create Claim page then opens. A screen shot and instructions for this document are shown on the next page of this document.

The second path for claim generation is through My Claims navigation tab.

“My Claims” path to claim generation: Click **My Claims** and then select **Create Claim**.

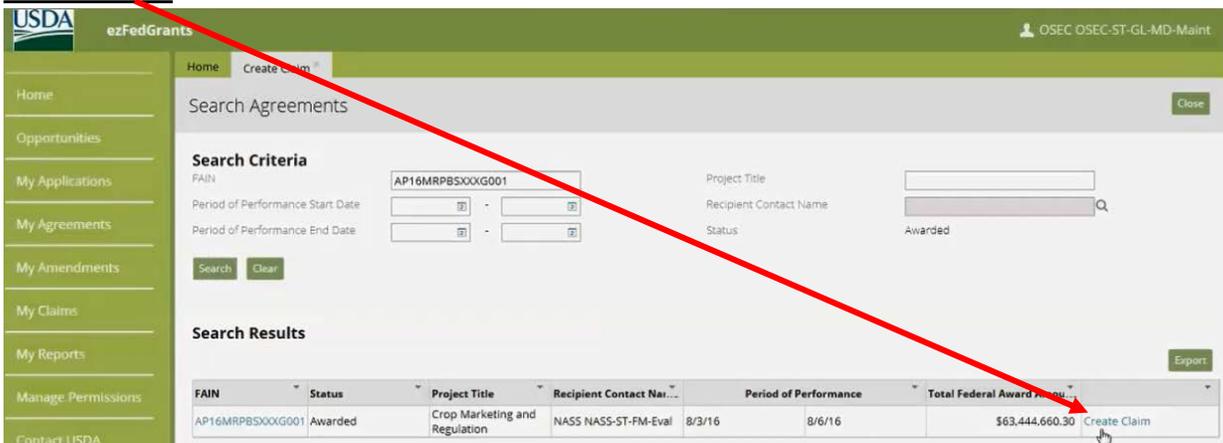


“My Claims” path to claim generation: The Search Criteria window pops up. Enter **Search Criteria**, and click **Search**.



Any of the available search criteria can be used individually or in conjunction. The most accurate criteria is the FAIN as is used in the example above.

“My Claims” path to claim generation: The Search Results populate. Scroll to the correct project, and click **Create Claim**.



Agreements enacted prior to the adoption of the ezFedGrants External Portal will not appear. If you cannot locate the agreement you are searching for, please contact your awarding agency for guidance.

When you select "Create Claim" via either path of claim generation, the Create Claim page then opens to **step 1 SF-270** on the breadcrumb view. Highlighted fields will prepopulate with agreement information.

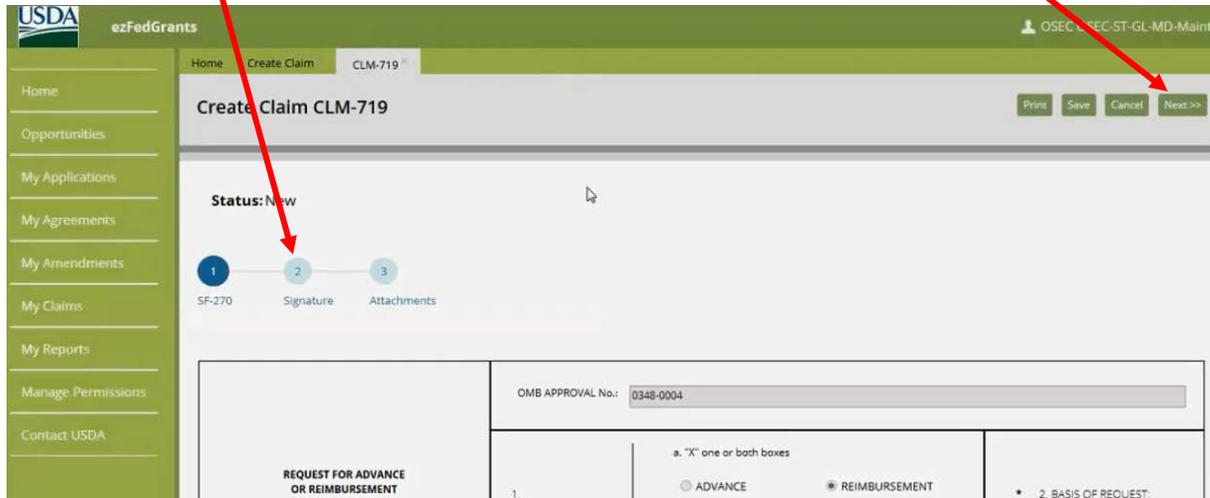
Scroll to complete fields on the form. Mandatory fields are marked with an asterisk *. However, your organization or agreement may require additional fields to be filled. Sections 3-6, 9, and 10 should be prepopulated from agreement information. Some agreements may require information in section 7.

Contact your awarding agency if guidance is required to fill some fields of the SF-270.

Section 11 **Computation of Amount of Reimbursements/Advances Requested**. Some fields in section 11 are prepopulated and may be manually edited. The highlighted fields within section 11 will automatically calculate or populate as other fields are filled.

11. COMPUTATION OF AMOUNT OF REIMBURSEMENTS/ADVANCES REQUESTED					
PROGRAMS/FUNCTIONS/ACTIVITIES		(a) AP1612-APACKG036	(b) Agency Calculations (For your reference only)	(c) Programs/Functions	
* a	Total program outlays to date (As of date) <input type="text" value="8/23/2016"/>	\$ <input type="text" value="1,500"/>	\$	\$	
* b.	Less: Cumulative program income	\$ <input type="text" value="0"/>			
c.	Net program outlays (Line a minus line b)	\$1,500.00			
d.	Estimated net cash outlays for advance period	\$ <input type="text"/>			

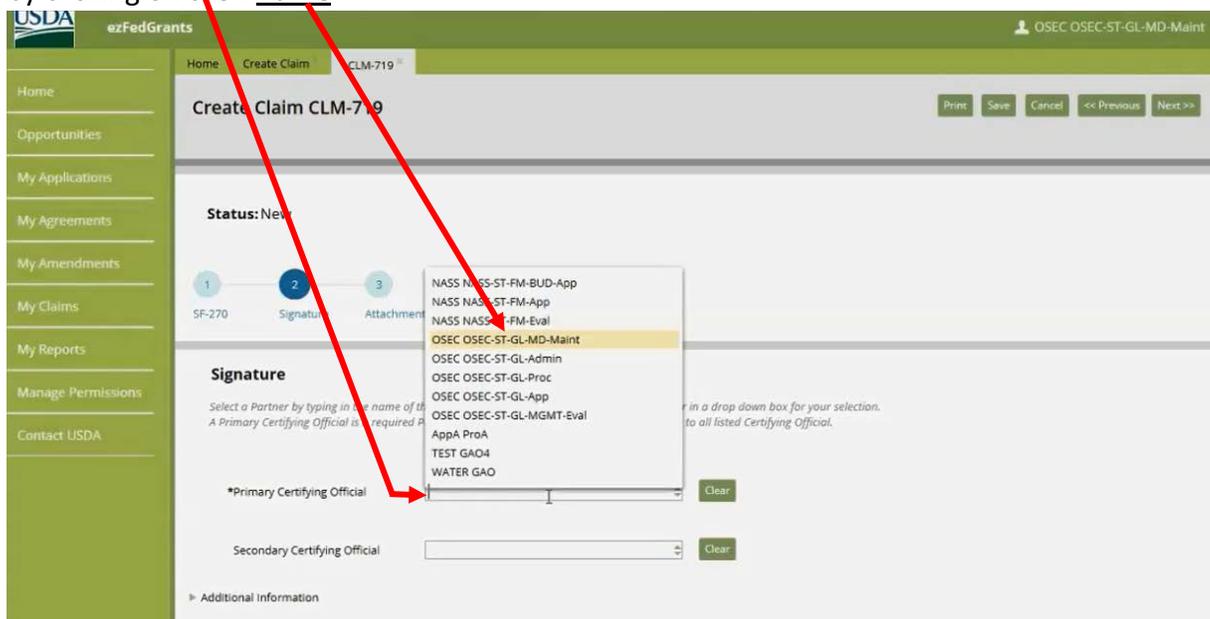
When the SF-270 is complete, navigate to the next step either by clicking **Next>>** or by using the step 2 breadcrumb **Signature**.



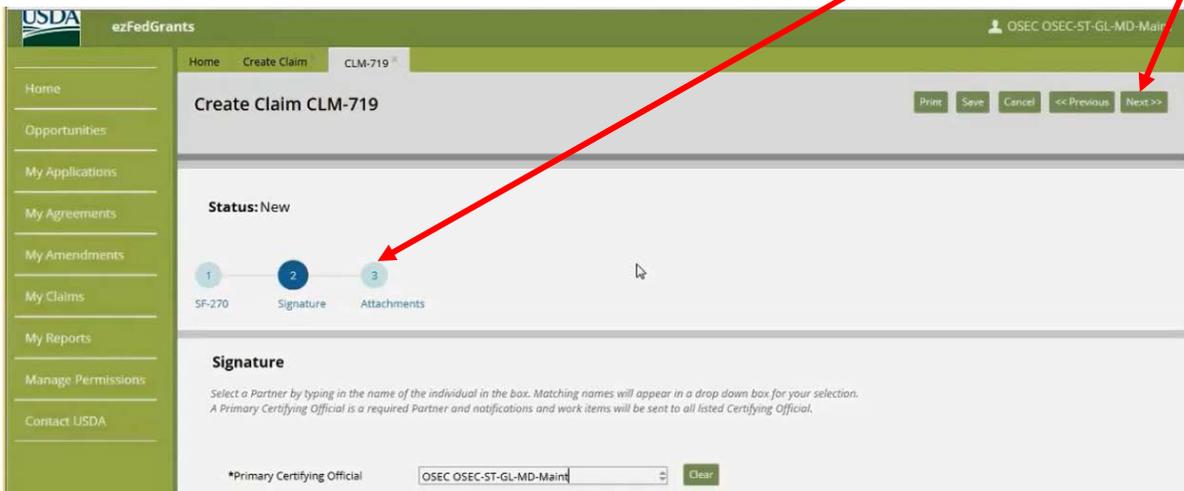
In the Signature step, the user initiating the claim assigns one or more Certifying Officials from their organization's employees with an ezFedGrants user role. Any user may be selected, including the user filing the claim. However, your organization may have a policy or designated individual determining which user should be selected. The Certifying Official will review and sign the claim before it is submitted to the awarding agency.

Primary and Secondary Certifying Official roles are temporary secondary user roles and are only valid for the specific claim documents they are assigned to. This is not the same user role as Signatory Official.

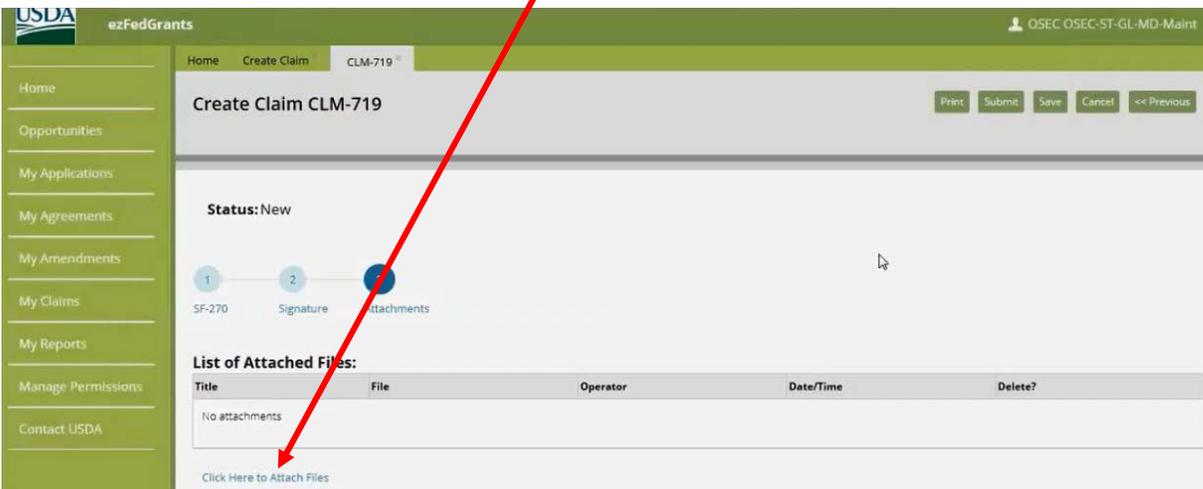
Click in the **Primary Certifying Official** field and start typing. A list of possible users will appear. Select the user by clicking on their **name**.



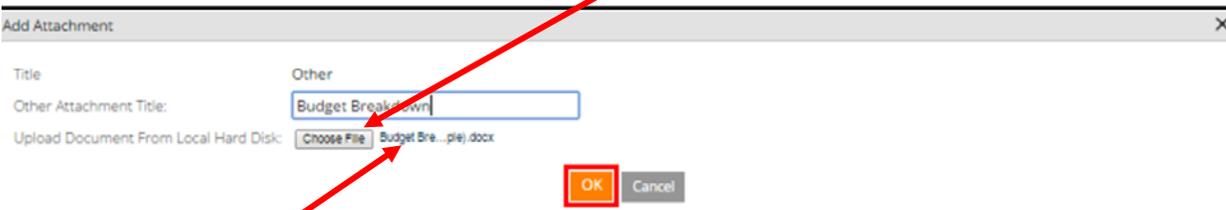
Advance to the next step either through clicking on breadcrumb 3 **Attachments** or clicking **Next>>**.



The ezFedGrants system does not require attachments to submit a claim, but your organization or awarding agency may. To attach files click **Click Here to Attach Files**.



The Add Attachment popup window will appear. Click **Choose File** and locate the desired attachment from your computer files.



The selected **file name** should appear next to the Choose File button.

Type a title for the attachment in the **Other Attachment Title** field. Then click **OK**.

Add Attachment

Title: Other

Other Attachment Title: Budget Breakdown

Upload Document From Local Hard Disk: Choose File Budget Bre...plej.docx

OK Cancel

Attached files will display in a list showing the title, file name, user who attached the file, and when it was attached. After all necessary attachments are loaded, click **Save**.

Create Claim CLM-688

Status: Draft

SF-270 Signature Attachments

List of Attached Files:

Title	File	Operator	Date/Time	Delete?
Budget Breakdown	Budget Breakdown \$28Sample\$29.docx	OSEC OSEC-ST-GL-FI-Rep	8/24/2016 2:09 PM	

Print Submit Save Cancel

Submit Save Cancel

After the successful save message appears, click **Submit**.

Create Claim CLM-688

Status: Draft

Claim CLM-688 has been successfully saved.

SF-270 Signature Attachments

List of Attached Files:

Title	File	Operator	Date/Time	Delete?
Budget Breakdown	Budget Breakdown \$28Sample\$29.docx	OSEC OSEC-ST-GL-FI-Rep	8/24/2016 2:09 PM	

Print Submit Save Cancel

Print Submit Save

Successful submission results in the Status changing to **Draft Pending Signature** and a **submitted claim banner** will appear. The claim will now show in the Actionable Items for the person designated as the Primary Certifying Official.

USDA ezFedGrants

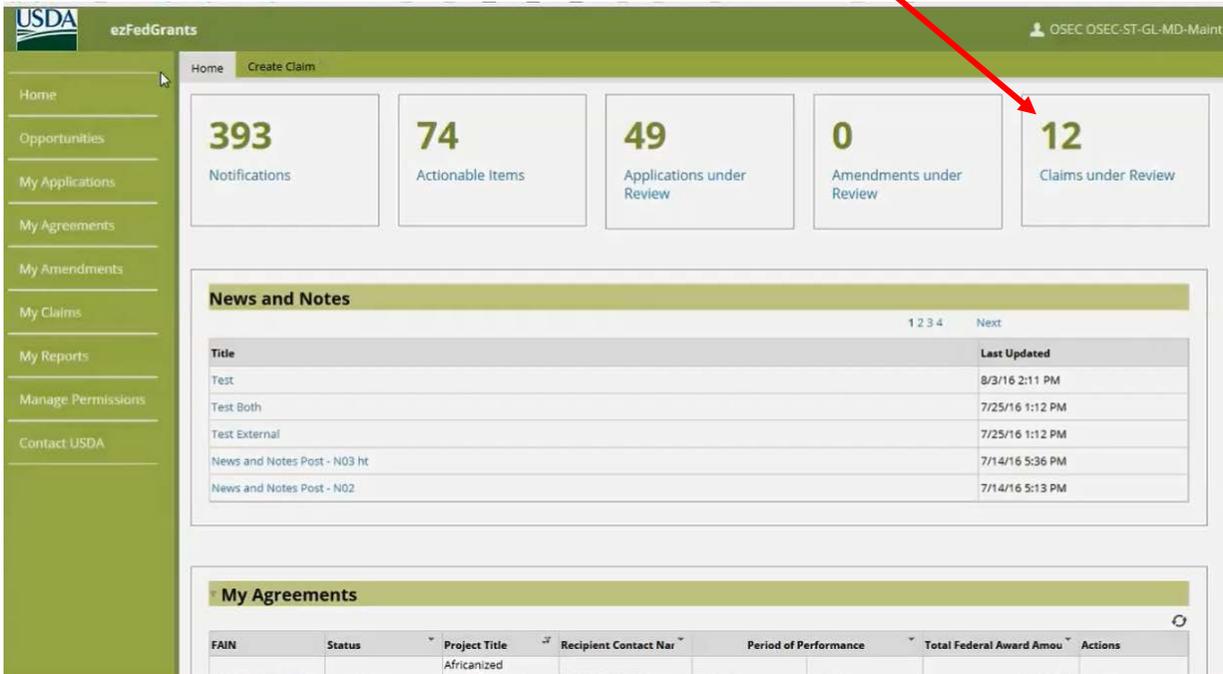
Home Create Claim CLM-719

Claim (CLM-719) Print Close

Status: Draft Pending Signature

Claim CLM-719 has been submitted for approval and signature to your Certifying Official.

The submitter can view the submitted claim by clicking on **Claims under Review**.



At this point, the claim is still in-house within your organization and pending internal review by the person(s) designated in the **breadcrumb 2 Signature** step as the Certifying Official(s). The claim creator should check the **Actionable Items** on their ezFedGrants home screen regularly to verify that the Certifying Official has not returned the claim back to the creator for editing.

A training module is available for this process at:

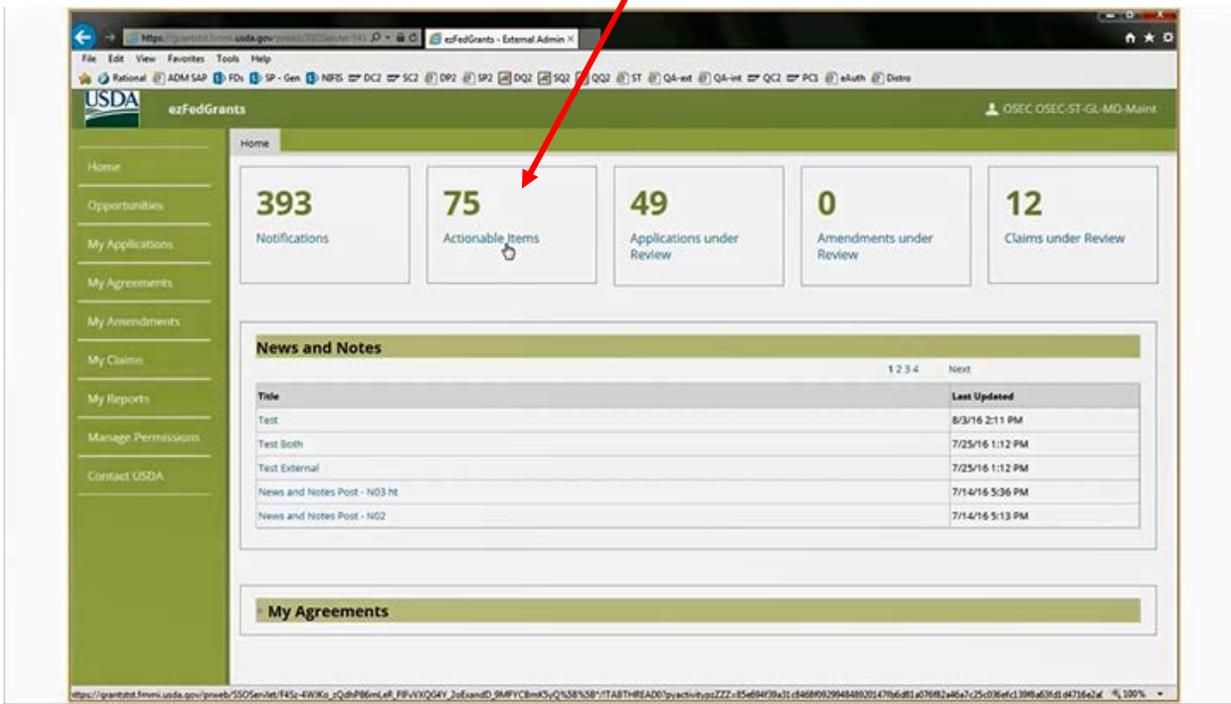
<https://www.aphis.usda.gov/mrpbs/fmd/downloads/Grantor-Implementation-Training/Module-6-Payment-Requests.mp4>

Completing and submitting a Financial or Performance Report.

When it is time to submit a report an Actionable Item will be created for selected users to complete the report. The users with the actionable item will have 30 days to complete the report before it will be considered overdue.

Please note that claims cannot be submitted against awards with overdue reports.

To locate the report to be completed click the **Actionable Items** tile.



This will result in a popup box containing all actionable items for the previous 90 days.

Note you may have to go to another page to find the transaction ID item for which you wish to submit a report. Click **Next or a number** to move to the other pages.

The screenshot shows a popup window titled 'Actionable Items for Past 90 Days'. It contains a table with the following columns: Transaction, Transaction ID, FAIN, Status, Due Date, and Last Updated. A red arrow points to the 'Next' button at the bottom of the table.

Transaction	Transaction ID	FAIN	Status	Due Date	Last Updated
Financial Report	AP16PPQHQQ003-FI-SA2-16	AP16PPQHQQ003	Draft Pending Signature	9/29/16	10/10/16
Financial Report	AP1612-PPFQG020-FI-Annual-16	AP1612-APPPQG020	Not started	12/8/16	10/10/16
Claim	APHIS-CLM-68	AP1612-APISXC001	Acceptance Pending Edits		9/30/16
Claim	APHIS-CLM-67	AP1612-APISXC001	Acceptance Pending Edits		9/30/16
Claim	APHIS-CLM-58	AP1612-APISXC001	Acceptance Pending Edits		9/30/16
Performance Report	AP16IS000-DOXC001-PE-Q4-16	AP16IS00000XC001	Not started	9/8/16	9/29/16
Performance Report	AP1612-APPPQG020-PE-Annual-16	AP1612-APPPQG020	Draft	12/8/16	9/27/16
Performance Report	AP1612-APPPQG020-PE-Annual-16	AP1612-APPPQG020	Draft	12/8/16	9/26/16
Application	APP-3966		Draft		9/21/16
Application	APHIS-APP-1		Pending Clarification		9/16/16

Click on the blue **Transaction ID** to Select the ID for the report to be completed.

Transaction	Transaction ID	FAIN	Status	Due Date	Last Updated
Performance Report	AP1612-APPPQG020-FI-Annual-16	AP1612-APPPQG020	Not started	12/8/16	9/9/16
Financial Report	AP1612-APPPQG020-FI-Annual-16	AP1612-APPPQG020	Not started	12/8/16	9/9/16
Performance Report	AP1612-APPPQG020-FI-Annual-16	AP1612-APPPQG020	Not started	12/8/16	9/9/16
Financial Report	AP1612-APPPQG020-FI-Annual-16	AP1612-APPPQG020	Not started	12/8/16	9/9/16
Financial Report	National Veterinary Accreditation Program	AP16PPQHGX000Y003	Not started	10/9/16	9/9/16
Performance Report	AP16PPQHGX000Y003-FI-SA2-16	AP16PPQHGX000Y003	Not started	10/9/16	9/9/16
Financial Report	NI1612-NIAHDG093-FI-SA2-16	NI1612-NIAHDG093	Draft	9/28/16	9/9/16
Application	APP-3936		Pending Clarification		9/9/16
Application	APP-3924		Pending Clarification		9/9/16
Application	APP-3920		Returned by Signatory Official		9/1/16

Across the top of the Status page there are a Series of nodes called **Breadcrumbs**. Each breadcrumb denotes a different component that needs to be completed by a user.

Home AP1612-APPPQG...

Create Report AP1612-APPPQG020-FI-Annual-16

Reassign Print Save Close Next >

Status: Not started

1 2 3

SF-425 Signature Attachments

Financial Report SF-425

1. Federal Agency and Organizational Element to Which Report is Submitted: USDA-APHIS	2. Federal Grant or Other Identifying Number Assigned by Federal Agency: (To report multiple grants, use FFR Attachment) AP1612-APPPQG020
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3. Recipient Organization (Name and complete address including Zip code)

Name: RURAL COALITION Incorporated CC: John White CC: Elizabeth Snow

Number & Street: RURAL COALITION

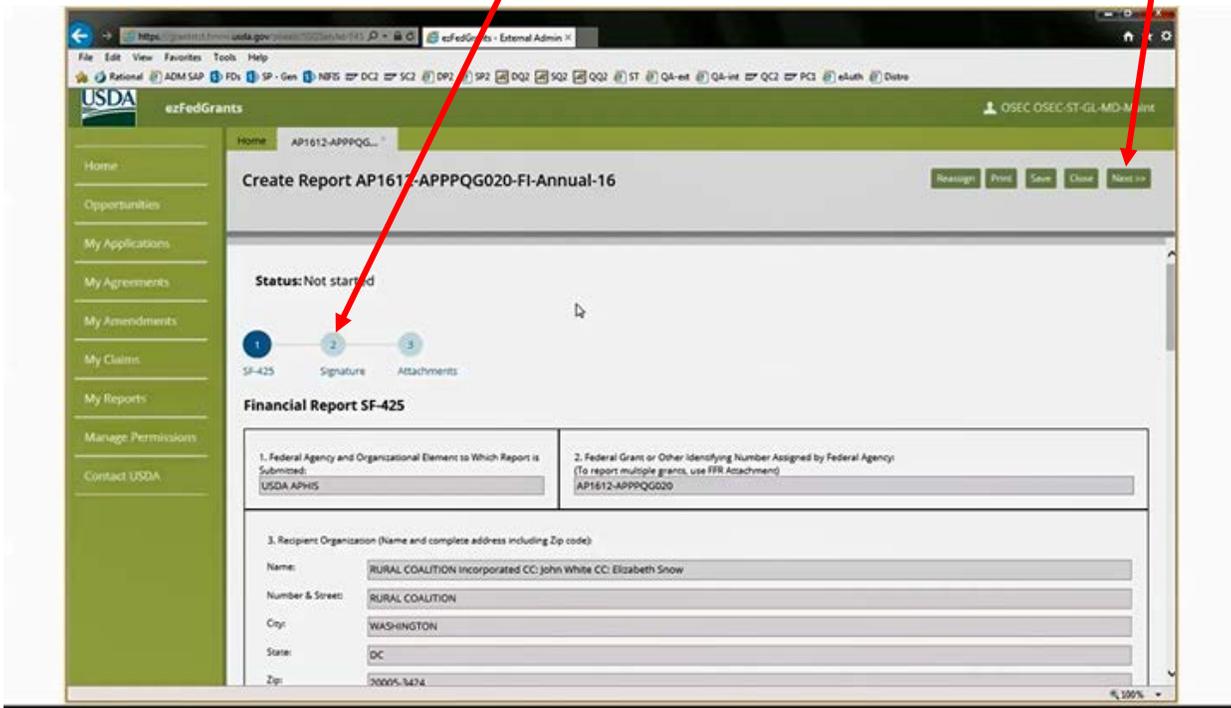
City: WASHINGTON

State: DC

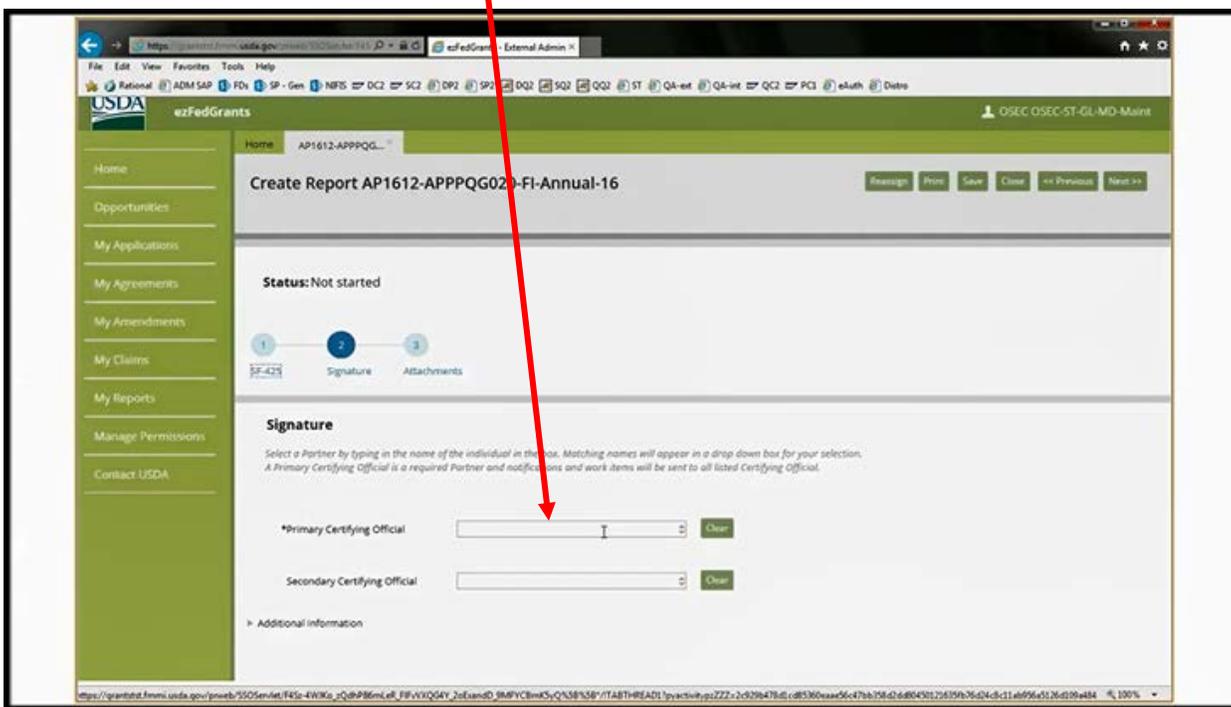
Zip: 20005-1434

The process for financial or performance reports has three breadcrumbs and the steps are the same. The only difference between the two reporting processes is the electronic likeness of the SF425 for financial reporting must be filled. A hard copy **cannot** be filled and attached. For the SF PPR performance report the narrative box may contain the message, "see attached report" and the performance narrative attached. The processes for Signature and Attachments remain exactly the same.

In this example a SF425 report is to be submitted. Complete the mandatory fields as denoted by the asterisks. Once all the required fields are completed, navigate to the next section by selecting the **next** button in the upper right corner or by selecting **breadcrumb 2**.

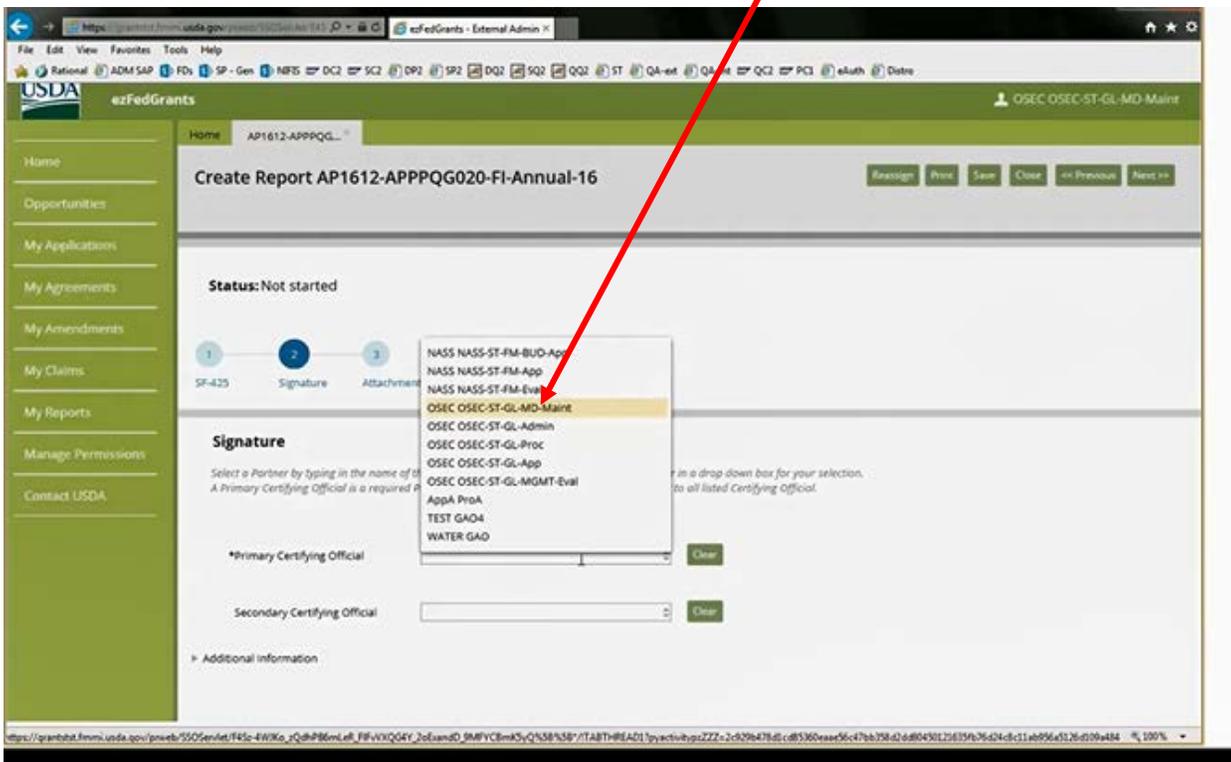


The Signature breadcrumb is where the user completing the report will designate the certifying official to sign the report. Click in the **Primary Certifying Official Box** for a pop up of users in the system.

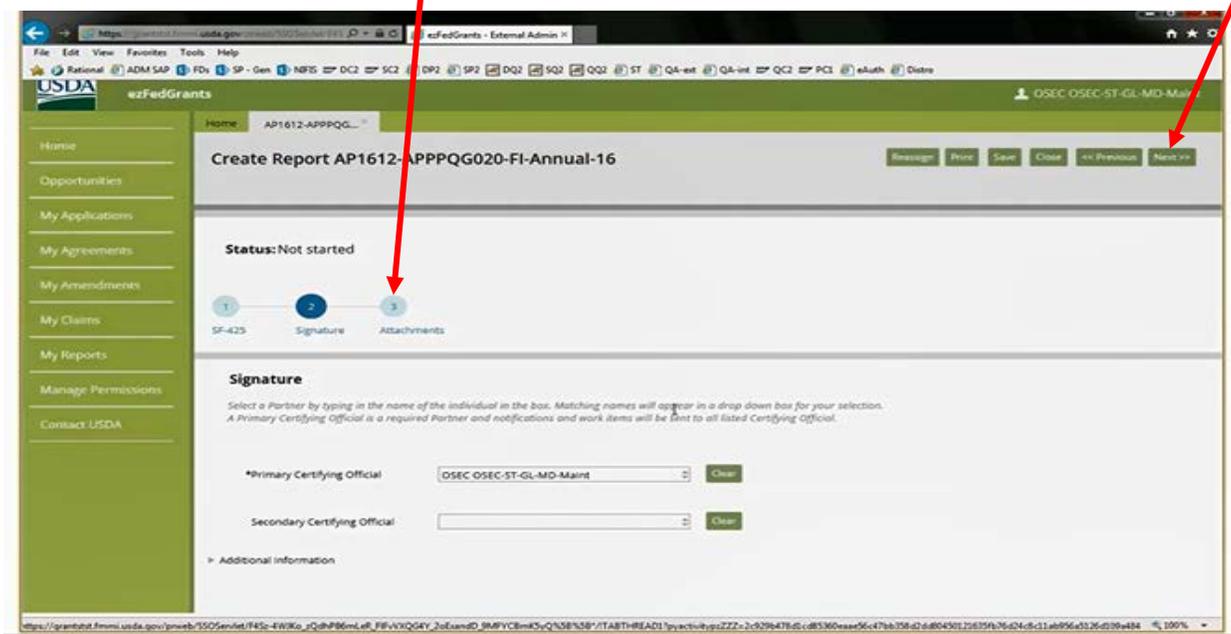


The person populated as the certifying official can be any user holding a role in the system including the person completing the report.

Scroll to select a certifying official and click on the appropriate name.

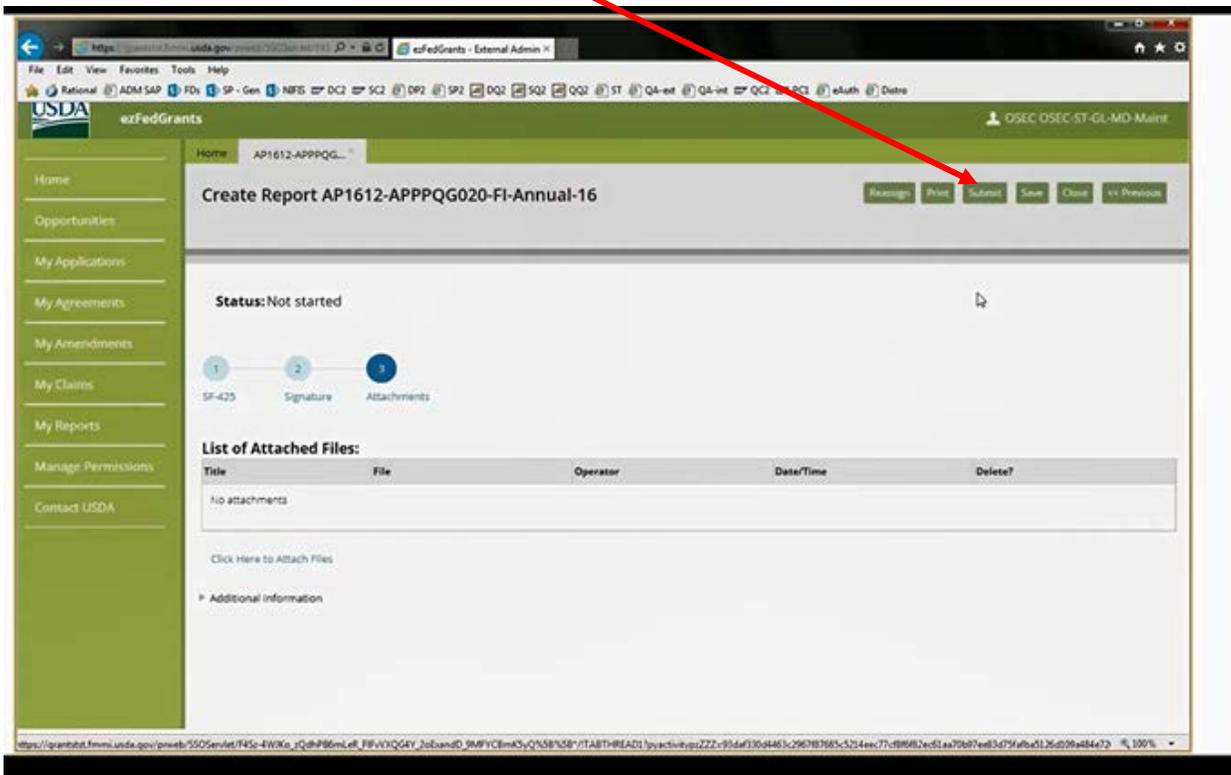


The certifying official will need to approve the report before it is routed to the agency for approval. Upon selecting an individual to be the certifying official, navigate to the next section by selecting the next button in the top right corner or breadcrumb 3.

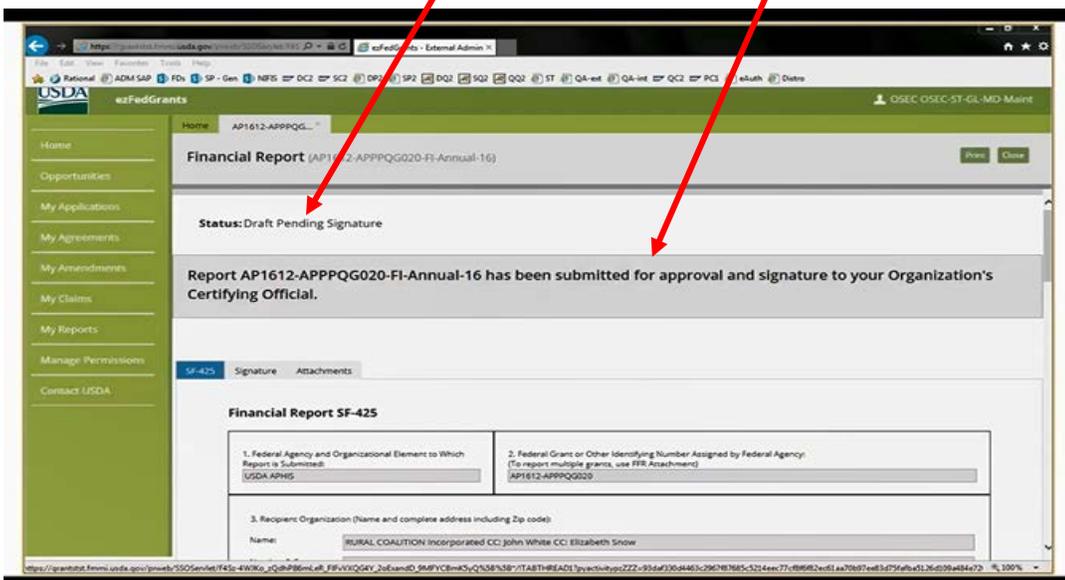


The attachments breadcrumb is where a user can upload attachments. There are no required attachments for the financial or performance report, but users have the ability to upload related documents if desired.

Upon completing the report, click the **Submit** button in the upper right hand corner of the screen.



The report has been submitted to the user populated on the certifying official tab in the previous step. The status will change to show **Draft Pending Signature** and a **banner** will indicate the submission.



SF PPR breadcrumb is an electronic version of a performance report. Complete the mandatory fields as denoted by the asterisks. Once all the required fields are completed, navigate to the next section by selecting **breadcrumb 2** or by selecting the **next** button in the upper right corner.

Home AP1612-APPPOG... AP16ISXXXXXC001...

Create Report AP16ISXXXXXC001-PE-Q4-16

Reassign Print Save Close Next >>

Status: Not started

1 SF-PPR 2 Signature 3 Attachments

1. Federal Agency and Organization Element to Which Report is submitted: USDA	2. Federal Grant or Other Identifying Number Assigned by Federal Agency: AP16ISXXXXXC001	3a. DUNS Number 027078547
		3b. EIN
4. Recipient Organization (Name and complete address including zip code): Name: RURAL COALITION Incorporated CC: John White CC: Elizabeth Snow Number & Street: RURAL COALITION		5. Recipient Identifying Number or Account Number:

100%

As previously noted, the signature and attachments breadcrumbs are in the same format as before. Please refer back to that section for more information (pages 45-46).

When a report is submitted, the certifying official will receive an actionable item to sign the report. Please refer to page 16 of this document for instructions on certifying reports.

A training module is available for this process at:

<https://www.aphis.usda.gov/mrpb/fmd/downloads/Grantor-Implementation-Training/Module-7-Progress-Reports.mp4>

Signing Applications, Agreements or Amendments as a Signatory Official

Signing an Application, Amendment or Award document follows the same path in eFG. The example that follows will be the process of signing an application. The actions for signing an Amendment or Award document will follow the same process of locating the needed action in Actionable Items, selecting a decision, agreeing to the legal disclaimer and clicking the complete signature button.

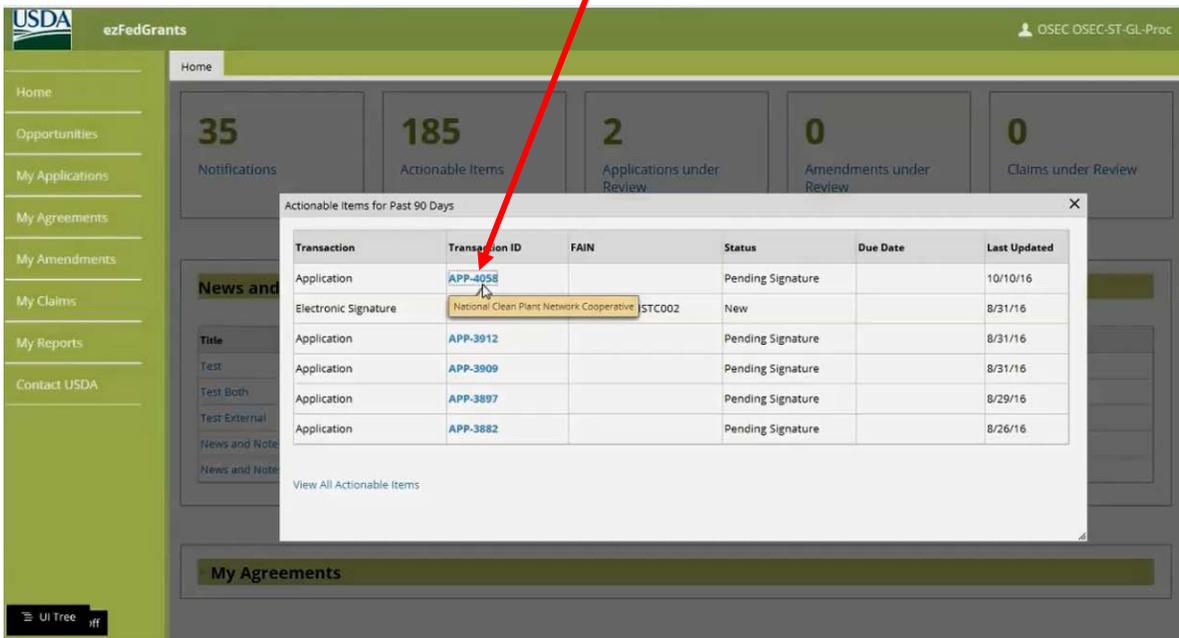
- Signatory Official and Certifying Officials are different roles within the ezFedGrants system.
- The Signatory Official (SO) role activity with an Application is to review prior to the Application being sent to the awarding agency. Some organizations may choose to have a set of SO role personnel for application signing that is different from the SO role personnel who sign Awards and Amendments.
- If specific Signatory Officials were designated on the **Partners** section of an application, only these specific Signatory Officials will receive the application for review in Actionable Items. If the field was left blank all Signatory Officials in the organization receive the application.

Navigate to the ezFedGrants home page and click [Actionable Items](#).

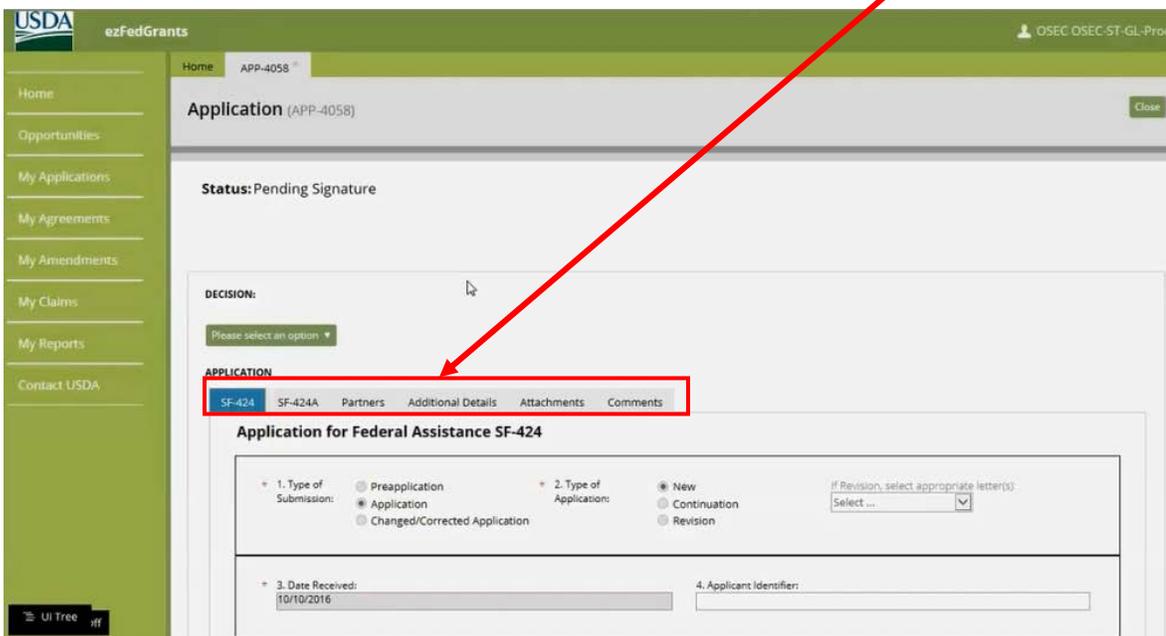
Title	Last Updated
Test	8/3/16 2:11 PM
Test Both	7/25/16 1:12 PM
Test External	7/25/16 1:12 PM
News and Notes Post - N03 ht	7/14/16 5:36 PM
News and Notes Post - N02	7/14/16 5:13 PM

Applications, Award documents and Amendments available for review and signature by a Signatory Official are in read-only status and must be returned if editing or attachments are required.

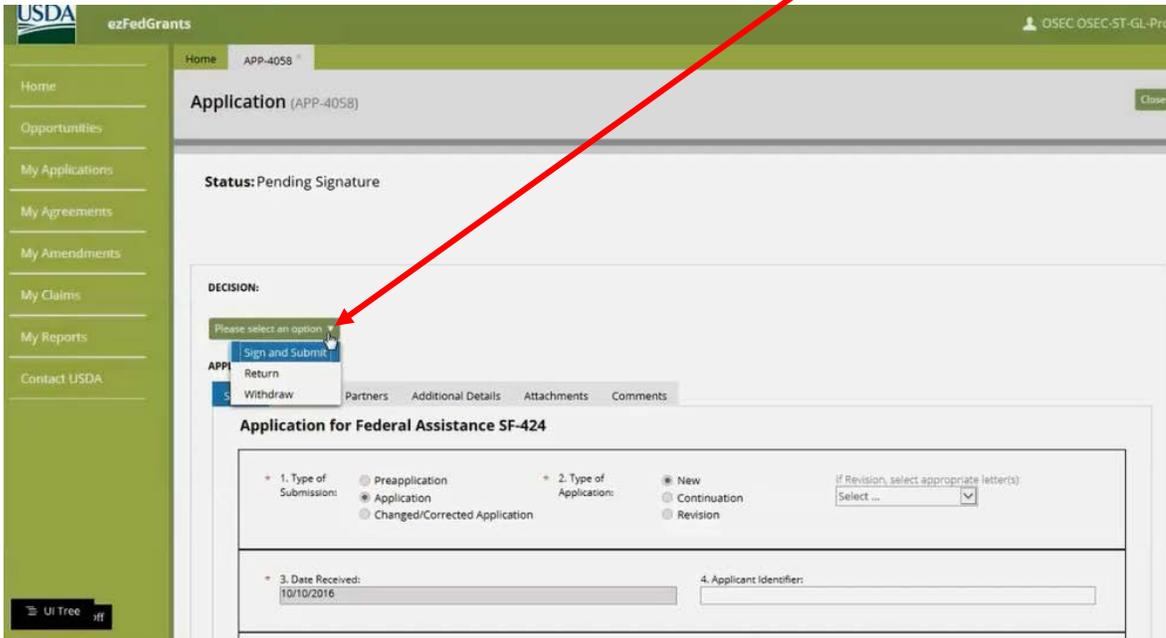
When Actionable Items is selected a list of all actionable items for the last 90 days will be displayed. Select the application by clicking on the appropriate **Transaction ID** in the popup window.



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

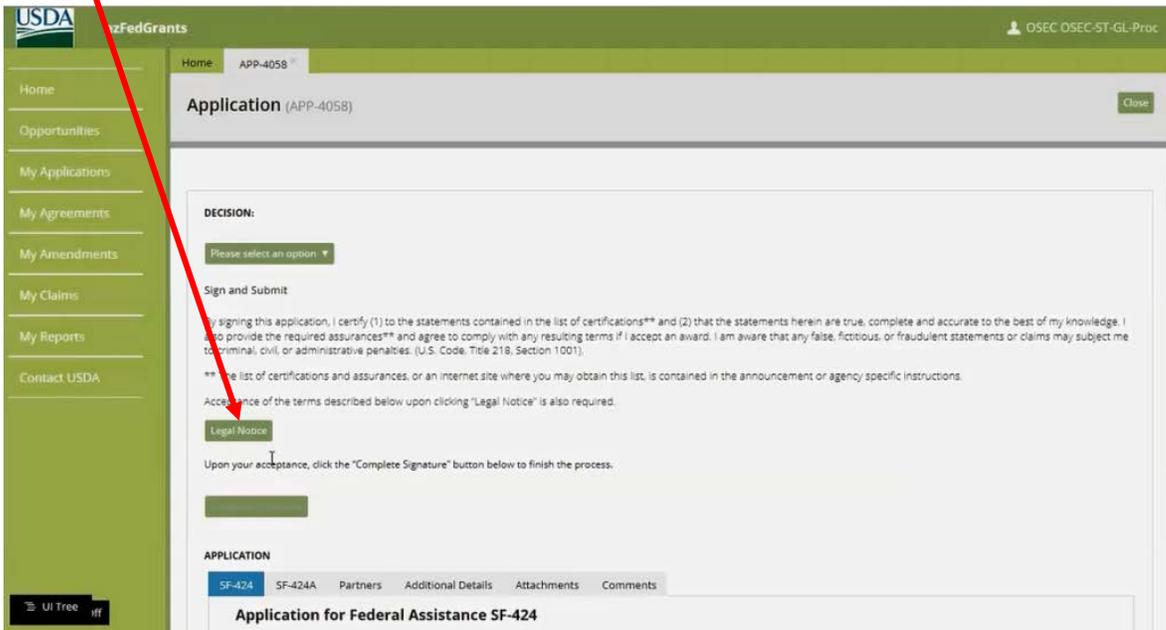


After reviewing the materials, in the Decision section, click the **Please Select an Option** dropdown box, and choose the appropriate action.

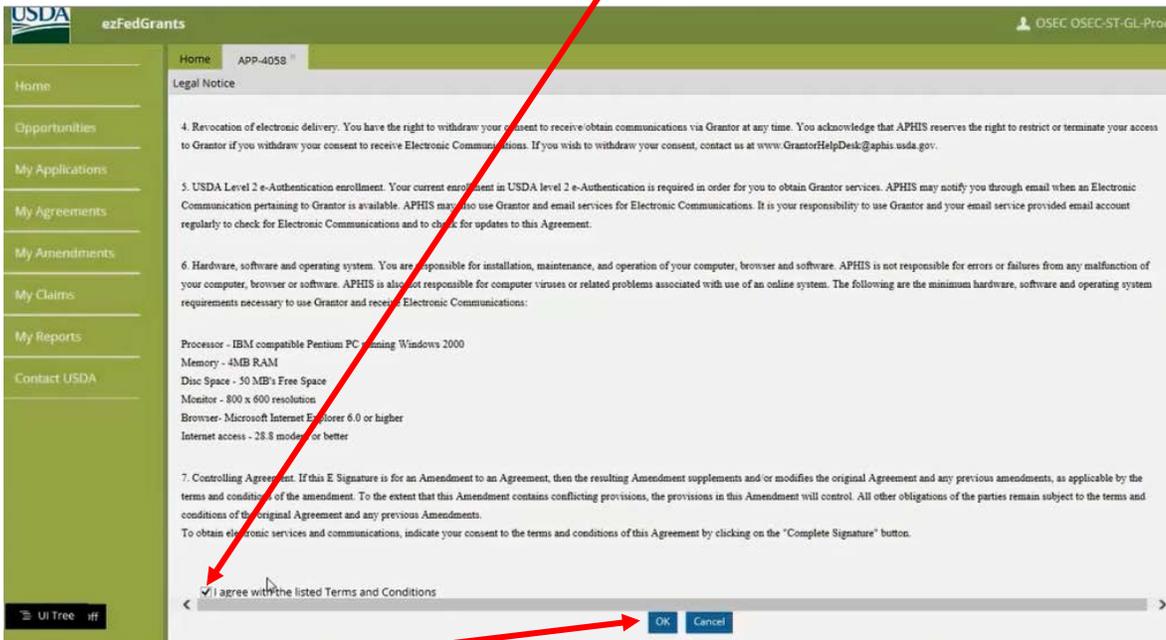


- If the application requires editing, select **Return**.
- If it should be cancelled or voided select **Withdraw**.

Upon selecting Sign and Submit from the previous screen the Legal Notice button will appear. Click **Legal Notice** to open the legal agreement page.

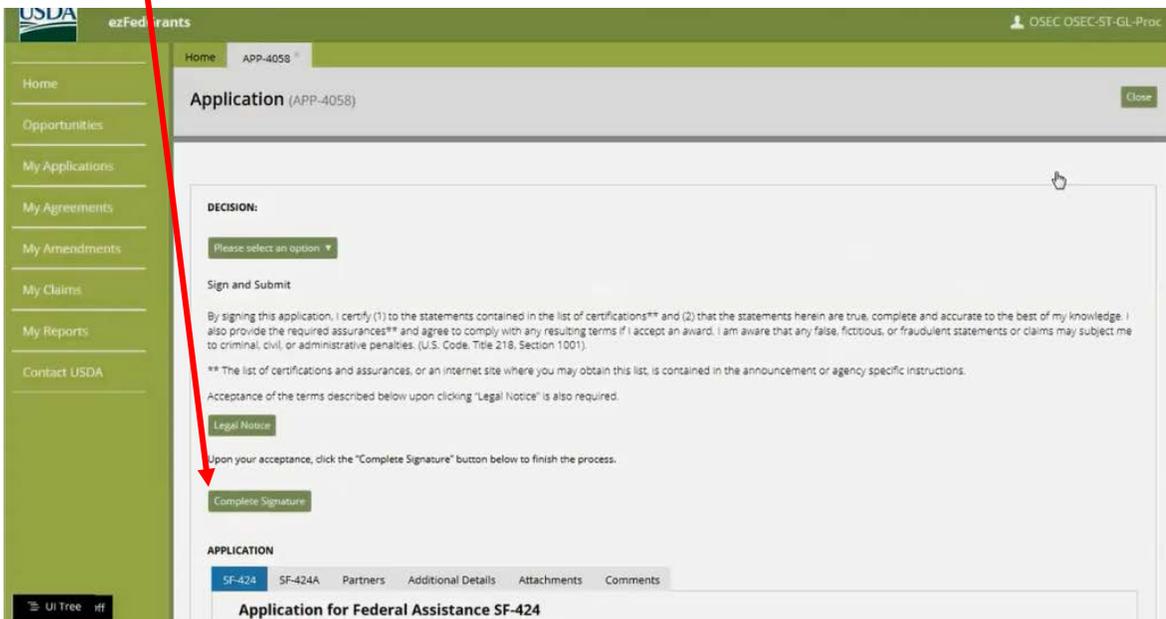


Scroll to read the legal agreement. Click the **checkbox** next to **I agree with the listed Terms and Conditions**.

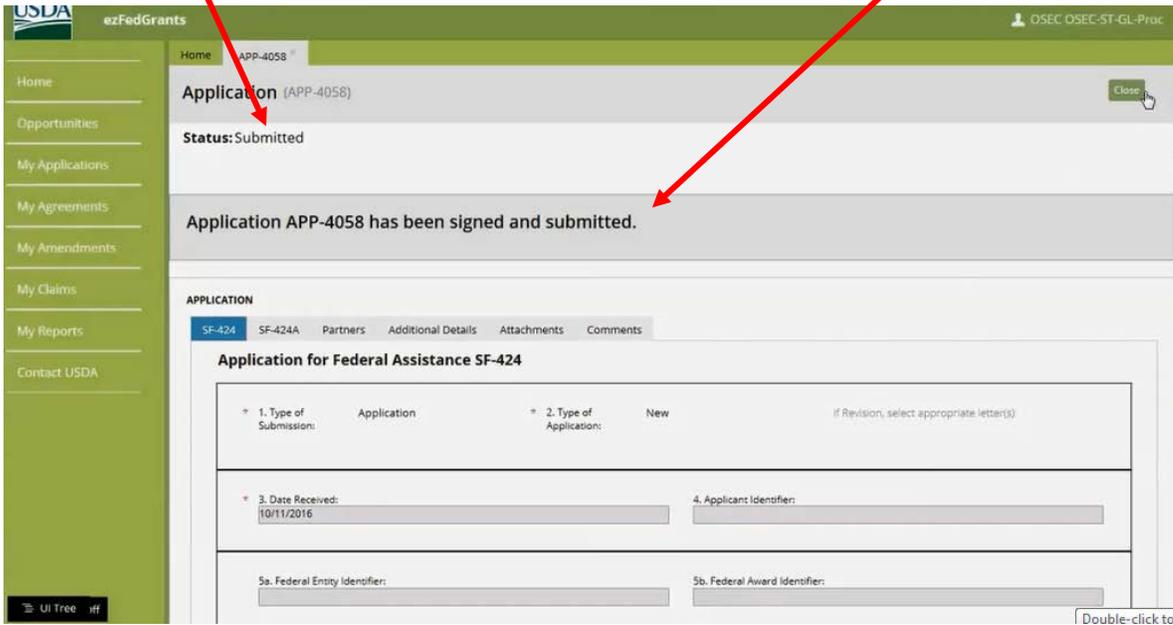


Click **OK**.

Click the **Complete Signature** button.



Successful signing and submission of the application will generate a **Confirmation banner** and changes the Status to **Submitted**.



A training module for signing amendments and award documents can be viewed at:

<https://www.aphis.usda.gov/mrpbs/fmd/downloads/Grantor-Implementation-Training/Module-4-E-Signature.mp4>