



## ezFedGrants External Portal Access Requests *Job Aid*

### Purpose

This job aid provides details for external users on requesting access to the ezFedGrants external portal.

### Trigger

Perform this procedure when you (a user for a recipient institution) require access to the ezFedGrants external portal.

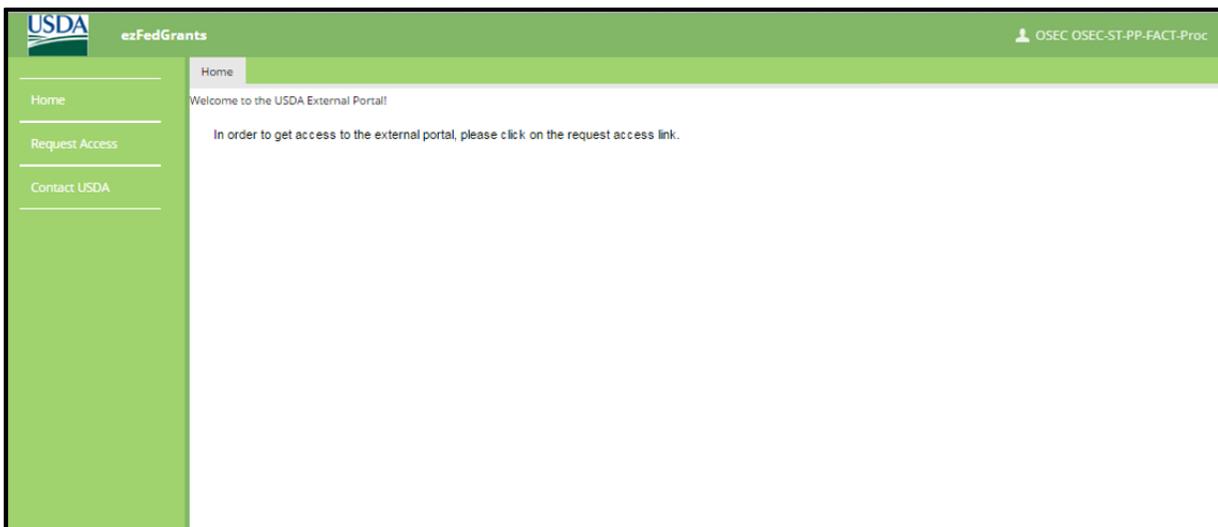
### Prerequisites

- In order to navigate to the request access screen, you will need Level 2 eAuthentication access.
- Before you can request access for the Grants Processor or Signatory Official roles, another individual from your organization must have been provisioned by USDA with the Grants Administrative Officer role.

### Menu Path

Use the following menu path to begin this procedure:

- **eAuthentication > ezFedGrants External Portal Home Screen**





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#### **Helpful Hints**

- On certain screens you may need to scroll to view additional data fields.
- Fields with an asterisk (\*) are required.
- Certain screenshots may display only a portion of the screen. Note that when working within a system, only the center body of the screen will change. The navigation options along the left side of the screen and the header bar across the top of the screen will remain the same.

**Note:** Data used in this procedure is a representative sample for the purpose of training. Actual data in the system may vary based on agency and scenario.

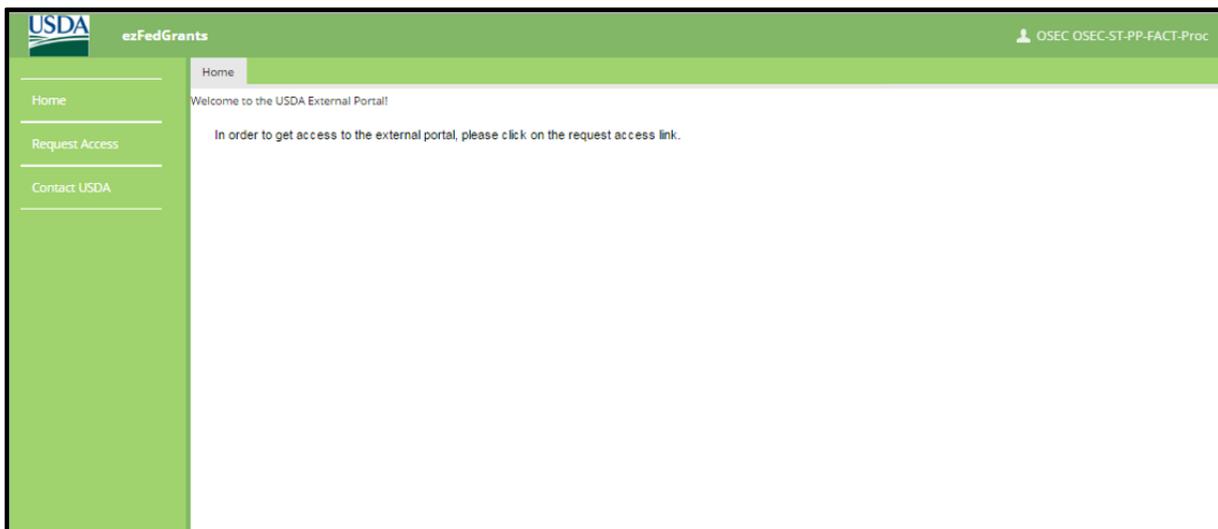


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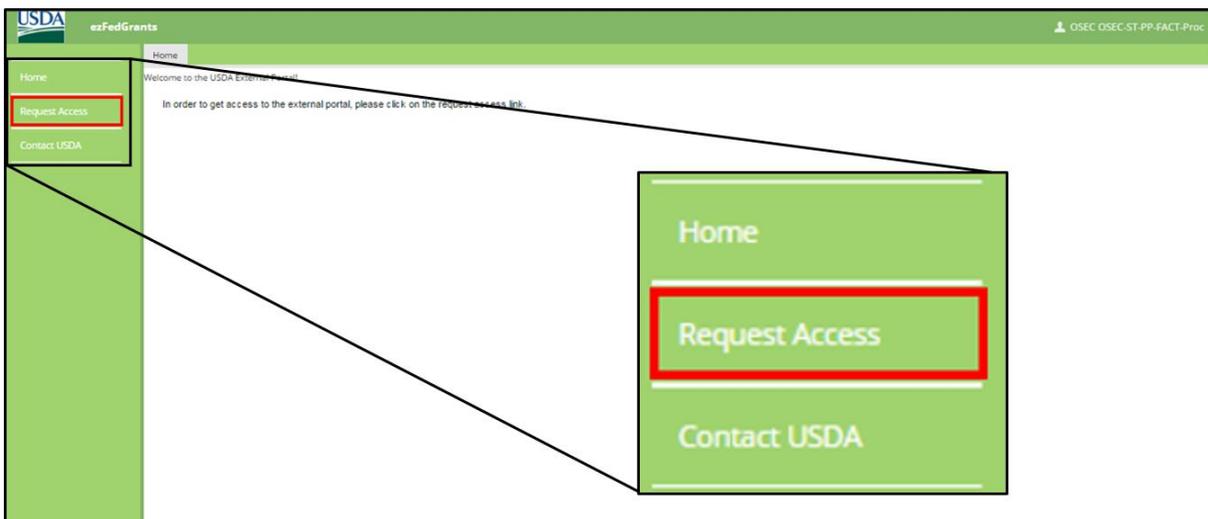
### Procedure

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

**Note:** Once you have full access to the ezFedGrants external portal, quick access links will be displayed in the center of the screen, and additional menu options will be available in the navigation pane on the left side of the screen.



2. From the **ezFedGrants External Portal Homepage** screen, click the **Request Access** tile.





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3. On the **Request Access** screen, click the **User Role** field and click your desired role from the **User Role** dropdown menu.

**Note:** The system displays the **Grants Processor** option by default.

The screenshot shows the 'Request Access RA-533' page in the 'Draft' status. A progress bar at the top indicates three steps: 1. Role Selection, 2. Organization, and 3. Personal Information. The 'Role Selection' section is highlighted with a red box, showing a dropdown menu with 'Grant Processor' selected. A callout box provides a magnified view of this dropdown menu.

4. Click in the **Justification Narrative** text box, and enter the justification for your access request.

The screenshot shows the 'Request Access RA-533' page with the 'Justification Narrative' text box highlighted by a red box. The text 'I am a grants processor for the university' is entered into the box. A callout box provides a magnified view of the text box.



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- Once you have selected your role and entered your justification comments, click the **Next** button to move to part two of the **Request Access** screen.

USDA ezFedGrants OSEC OSEC-ST-PP-FACT-Proc

Home RA-533

Request Access RA-533

Status: Draft

1 Role Selection 2 Organization 3 Personal Information

Role Selection

User Role Grant Processor

Justification Narrative

I am a grants processor for the university

Print Next >>

- On part two of the **Request Access** screen, click the **Find Organization** button to open the **Search Organization** popup window and search for your organization.

USDA ezFedGrants OSEC OSEC-ST-PP-FACT-Proc

Home RA-533

Request Access RA-533

Status: Draft

1 Role Selection 2 Organization 3 Personal Information

Organization Details

Find Organization

Print << Previous Next >>

Organization Details

Find Organization



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7. In the **Search Organization** popup window, enter the applicable/known criteria for your organization into the given search fields.

The screenshot shows a 'Search Organization' popup window with a title bar containing a close button (X). The main heading is 'Select Organization'. Below this is a section titled 'Search Criteria' which contains several input fields: 'CRM Organization ID', 'DUNS Number', 'Organization', 'City', 'State' (a dropdown menu), 'Postal Code', and 'Country' (a dropdown menu). A red rectangular box highlights the 'CRM Organization ID', 'DUNS Number', 'Organization', and 'City' fields. At the bottom left of the form area are two buttons: 'Search' and 'Clear'.

8. When you have entered all relevant search criteria, click the **Search** button.

This screenshot shows the same 'Search Organization' popup window. The 'City' field now contains the text 'David'. A red rectangular box highlights the 'Search' button, indicating the next step in the process.



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9. Scroll down in the **Search Organization** popup window to the **Search Results** section.

The screenshot shows a 'Search Organization' popup window. At the top, there are input fields for 'DUNS Number', 'Postal Code', 'Organization', 'Country', and 'City'. The 'City' field contains the text 'Davis'. Below these fields are two buttons: 'Search' and 'Clear'. Below the search fields is a section titled 'Search Results' which is highlighted with a red border. Inside this section, there is an 'Export' button and a table with the following data:

	Organization	Street Numbe	City	St	Postal Cc	Phone numl	Count
<a href="#">Join Organization</a>	CALIFORNIA DAIRY RESEARCH FOUNDATIO N	501 G ST STE 203	DAVIS	CA	95616-3820	(202) 908-0987	US

10. Locate your organization in the **Search Results** section, and click the **Join Organization** link to the left of the organization name.

This screenshot is identical to the previous one, but the 'Join Organization' link in the search results table is highlighted with a red box.



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11. The fields in the **Organization Details** section will populate with your organization's information. Click the **Next** button to proceed to part three of the **Request Access** screen.

The screenshot shows the 'Request Access RA-533' screen. The 'Organization Details' section is populated with the following information:

CRM Organization ID	1102208303	Address	501 G ST STE 203
DUNS Number	905866134	City	DAVIS
Organization	CALIFORNIA DAIRY RESEARCH FOUNDATIO N	State	CA
Phone	(202) 908-0987	Postal Code	95616-3820

The 'Next >>' button is highlighted with a red box. The 'Print' and '<< Previous' buttons are also visible.

12. In the **POC Details** section of the **Request Access** screen, click in the **School/Dept/Div/Prog** field and enter your point of contact's school, department, division, and/or program under your organization.

The screenshot shows the 'Request Access RA-533' screen. The 'POC Details' section is highlighted with a red box. The 'School/Dept/Div/Prog' field is populated with 'School of Agriculture'.

The 'Work Contact Information' section is also visible, with the following fields:

- Organization: CALIFORNIA DAIRY RESEARCH FOUNDATIO N
- School/Dept/Div/Prog: School of Agriculture
- POC Email: [Empty]
- POC Phone: [Empty]



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13. Click in the **Supervisory Point of Contact (POC)** field and enter your point of contact for your school, department, division, or program under your organization.

The screenshot shows the 'Request Access RA-533' form in the 'Draft' status. The progress bar indicates the current step is 'Organization'. The 'POC Details' section is expanded, showing the 'Supervisory Point of Contact (POC)' field with the value 'Jane Doe' and the 'School/Dept/Div/Prog' field with the value 'School of Agriculture'. Both fields are highlighted with red boxes. The 'Work Contact Information' section is also visible, with fields for Title, Academic Title, First Name, Middle Name, Last Name, and Professional Title.

14. Click in the **POC Email** field and enter your point of contact's email address.

The screenshot shows the 'Request Access RA-533' form in the 'Draft' status. The progress bar indicates the current step is 'Personal Information'. The 'POC Details' section is expanded, showing the 'POC Email' field with the value 'jane.doe@gmailtest.com' and the 'POC Phone' field. Both fields are highlighted with red boxes. The 'Work Contact Information' section is also visible, with fields for Title, Academic Title, First Name, Middle Name, Last Name, and Professional Title.



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15. Click in the **POC Phone** field and enter your point of contact's phone number.

The screenshot shows the 'Request Access RA-533' page in the ezFedGrants portal. The status is 'Draft'. A progress bar indicates three steps: 1. Role Selection, 2. Organization, and 3. Personal Information. The 'POC Details' section is expanded, showing fields for Organization (CALIFORNIA DAIRY RESEARCH FOUNDATION N), School/Dept/Div/Prog (School of Agriculture), and Supervisor/Principal Contact (POC) (Jane Doe). A callout box highlights the 'POC Phone' field, which contains the number '2028675309'. Another callout box highlights the 'POC Email' field, which contains 'jane.doe@gmailtest.com'.

16. Scroll down to the **Work Contact Information** section to enter your work contact information.

**Note:** Fields with an asterisk (\*) are required. Some fields may be pre-populated based on your eAuthentication profile.

The screenshot shows the 'Request Access RA-533' page in the ezFedGrants portal. The 'Work Contact Information' section is expanded and highlighted with a red box. The section contains several fields: Title (dropdown), Academic Title (dropdown), First Name (OSEC), Middle Name, Last Name (OSEC-ST-PP-FACT-Proc), Professional Title, Street, House Number, City, State (Alabama (AL)), Postal Code, Country (United States), Country Code (Phone), Phone, and Extension.



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17. Click in the **Professional Title** field and type your grants-related title.

The screenshot shows the 'Request Access RA-533' form in the ezFedGrants portal. The 'Work Contact Information' section is expanded, and the 'Professional Title' field is highlighted with a red box. The text 'Grants Processor' is entered in this field. A magnified view of the field is shown below, with a red border around the text input area.

18. Click in the **Street** field and enter your work street address.

The screenshot shows the 'Request Access RA-533' form in the ezFedGrants portal. The 'Work Contact Information' section is expanded, and the 'Street' field is highlighted with a red box. The text '9999 Gantry Road' is entered in this field. A magnified view of the field is shown below, with a red border around the text input area.



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19. Click in the **City** field and type your work address city.

The screenshot shows the 'Request Access RA-533' form in the ezFedGrants portal. The 'Work Contact Information' section is expanded, showing fields for Title, Academic Title, First Name, Middle Name, Last Name, Professional Title, Street, House Number, City, and State. The 'City' field is highlighted with a red box and contains the text 'Arlington'. A magnified view of the 'City' field is shown below, with a red box around the field and a blue box around the text 'Arlington'.

20. Click in the **State** field and select your work address state from the **State** dropdown menu.

The screenshot shows the 'Request Access RA-533' form in the ezFedGrants portal. The 'Work Contact Information' section is expanded, showing fields for Title, Academic Title, First Name, Middle Name, Last Name, Professional Title, Street, House Number, City, State, Postal Code, Country, Country Code (Phone), Phone, and Extension. The 'State' field is highlighted with a red box and contains the text 'Virginia (VA)'. A magnified view of the 'State' field is shown below, with a red box around the field and a blue box around the text 'Virginia (VA)'.



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21. Click in the **Postal Code** field and enter your work address zip/postal code.

The screenshot shows the 'Request Access RA-533' form in the ezFedGrants portal. The 'Work Contact Information' section is expanded, showing fields for Title, Academic Title, First Name (OSEC), and Middle Name. The 'Postal Code' field is highlighted with a red box and contains the value '22201'. A callout box points to the 'Postal Code' field in the address section, which also contains '22201'. Other address fields include House Number, City (Arlington), State (Virginia (VA)), Country (United States), and Phone (Country Code (Phone), Phone, Extension).

22. Click in the **Phone** field and enter your work phone number.

**Note:** The **Country Code (Phone)** field is only necessary if your work phone number is a non-US number.

The screenshot shows the 'Request Access RA-533' form in the ezFedGrants portal. The 'Work Contact Information' section is expanded, showing fields for Title, Academic Title, First Name (OSEC), Middle Name, Last Name (OSEC-ST-PP-FACT-Proc), and Professional Title (Grants Processor). The 'Phone' field is highlighted with a red box and contains the value '2028675309'. A callout box points to the 'Phone' field in the address section, which also contains '2028675309'. Other address fields include Postal Code (22201), Country (United States), Country Code (Phone), and Extension.



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23. Click in the **Work Email** field, and enter your work email address.

The screenshot shows the 'Request Access RA-533' form in the ezFedGrants portal. The form is titled 'Request Access RA-533' and includes a 'Print' button, a 'Submit' button, and a '<< Previous' button. The form is divided into sections: 'Work Contact Information' and 'Work Email'. The 'Work Contact Information' section includes fields for Title, Academic Title, First Name (OSEC), Middle Name, Last Name (OSEC-ST-PP-FACT-Proc), Professional Title (Grants Processor), Street (9999 Gantry Road), House Number, and City (Arlington). The 'Work Email' field is highlighted with a red box and contains the text 'john.doe@gmailtest.com'. A callout box points to the 'Work Email' field in the bottom section of the form.

24. Once you have entered all of your information, click the **Submit** button to submit your access request.

The screenshot shows the 'Request Access RA-533' form in the ezFedGrants portal. The form is titled 'Request Access RA-533' and includes a 'Print' button, a 'Submit' button, and a '<< Previous' button. The form is divided into sections: 'Status: Draft', 'Role Selection', 'Organization', 'Personal Information', 'POC Details', and 'Work Contact Information'. The 'Status: Draft' section shows a progress bar with three steps: 1. Role Selection, 2. Organization, and 3. Personal Information. The 'POC Details' section includes fields for Organization (CALIFORNIA DAIRY RESEARCH FOUNDATIO N), School/Dept/Div/Prog (School of Agriculture), and Supervisory Point of Contact (POC) (Jane Doe). The 'Work Contact Information' section includes fields for Title, Academic Title, First Name (OSEC), Middle Name, Last Name (OSEC-ST-PP-FACT-Proc), and Professional Title (Grants Processor). The 'Submit' button is highlighted with a red box. A callout box points to the 'Submit' button.



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25. If you access request has been submitted to your Grants Administrative Officer successfully, the system will display a confirmation message. Once your Grants Administrative Officer approves your request, you will have access to the ezFedGrants external portal.

The screenshot shows the ezFedGrants external portal interface. The top navigation bar includes the USDA logo, the text "ezFedGrants", and a user profile icon labeled "OSEC OSEC-ST-PP-FACT-Proc". A breadcrumb trail shows "Home" and "RA-533". The main content area is titled "Request Access (RA-533)" and includes "Print" and "Close" buttons. The status is "Submitted". A red-bordered box highlights the confirmation message: "Your request has been submitted to the administrator(s) listed below and your request will be emailed to you." Below this, a table lists the administrator's details:

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

The "Request Access" section has three tabs: "Role Selection" (active), "Organization", and "Personal Information". Under "Role Selection", there are two radio button options:

- User Role: Grant Processor
- Justification Narrative: I am a grants processor for the university



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### Comments

Refer to the following additional materials:

- ezFedGrants External Portal Recipient User Role Management Job Aid
- ezFedGrants External Portal Overview & Navigation for External Users Job Aid