



ezFedGrants External Portal User Roles

Quick Reference

Primary Roles

There are three primary roles available to external users (grant award applicants and recipients). All users **must** have one primary role, and each user cannot have more than one primary role. However, each **organization** may have multiple users with the same primary role (i.e. three GAOs, two SOs, six GPs).

Grants Administrative Officer (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.

This Role Can:

- Approve access requests, change user roles, and deactivate user access.
 - Refer to the **External Portal User Role Management** and **External Portal Access Request Review** job aids for more information.
- View applications, opportunities, award documents, claims, and reports.
- Create claims and applications.
- Prepare and submit reports for agreements.
- Reassign reports (change who is responsible for completing the report).
- Be designated as a Certifying Official (secondary role).

Example Occupational Functions and Titles:

- **Titles:** Grants Administrative Specialist, Grants Administrative Manager, Grants Administrator
- Provide advanced grants administrative support and management including expertise in application processes and regulatory, reporting, and financial compliance
- Monitor grant award budgets, prepare and process claims, verify the accuracy of claims
- Support and assist in preparing and submitting grant proposals
- Assist in completing and submitting quarterly and annual federal grant reports

Grants Processor (GP)

This role is similar to the GAO role, with the primary difference being that the GP cannot review access requests, manage user roles/access, or reassign reports.

This Role Can:

- Prepare and submit reports for agreements on which they are listed as the appropriate Partner type (varies by agency).
- Create applications and claims.
- Be designated as a Certifying Official (secondary role).

Example Occupational Functions & Titles:

- **Titles:** Grants Financial Analyst, Grants Officer, Grants Assistant
- Assist with preparing grants applications, writing and proofreading proposals
- Prepare claims and invoices, provide updates on grants budgets
- Prepare grant award data for quarterly and annual federal reports

Signatory Official (SO)

This role has a limited scope compared to the other roles, but each organization must have at least one SO in order to **fully** use the ezFedGrants External Portal. If your organization does not have an SO, you will not be able to submit applications or sign agreement documents in the ezFedGrants External Portal. Refer to the **ezFedGrants for Small Organizations Quick Reference** document for more information.

This Role Can:

- Review and digitally sign applications and agreement documents.
- Be designated as a Certifying Official (secondary role).

Example Occupational Functions:

- Verify grant applications are complete and accurate
- Review and sign completed grant applications
- Review and sign grant award packages prior to notification of award
- Review and sign amended grant award packages

Secondary Roles

There are two secondary roles. All users may have one or both of the secondary roles in addition to their primary role.

Certifying Official

The Certifying Official reviews and signs claims and reports. This is a temporary role that only applies to a specific report or claim, and is designated by the claim/report creator. Any user can be a Certifying Official regardless of their primary role. Claim/report creators can even designate themselves as the Certifying Officials for their own claims/reports.

Reviewer

This role allows users to participate in application panel review activities and is obtained by indicating interest in panel review activities on your user profile.