



## Role Assignment Request

Job Aid

### Before You Begin

This document provides instructions for external users to submit an initial Role Assignment Request which is required to view information (such as opportunities and agreements) and complete grants- and agreements-related tasks in ezFedGrants.

If you already have access to ezFedGrants, you can join additional organizations through your user profile. Refer to the [Working with Multiple Organizations in ezFedGrants Quick Reference](#) for more information.

### Key Terms

- **External User:** An individual who interacts with USDA agencies or offices on behalf of an organization. External users may also be referred to as recipients, applicants, cooperators, or agency customers.
- **Organization:** Any number of institutions, such as colleges, universities, non-profits, tribal organizations, state governments, or otherwise, that engage with the Federal Government through grants or other types of agreements.
- **Organization ID:** Organization IDs, such as Unique Entity ID (UEI) numbers, are used to indicate the specific legal entities that are recipients of Federal grants/agreements. Each organization has at least one unique organization ID. Large or multifaceted organizations may have multiple IDs under a larger institutional umbrella (such as separate departments or campuses of a single university).

### You Will Need

- An eAuthentication/Login.gov verified identity Account
- The UEI number or other organization ID for all organizations you will represent in ezFedGrants.

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### Data Note

The screenshots provided with these instructions are a representative sample for the purpose of training, which contain sample data and may not depict the entire screen.

In addition, these instructions focus on the **minimum system requirements** for the above-described procedure(s). You may need to complete additional fields or provide additional information not specifically described in this document.



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### Getting Started

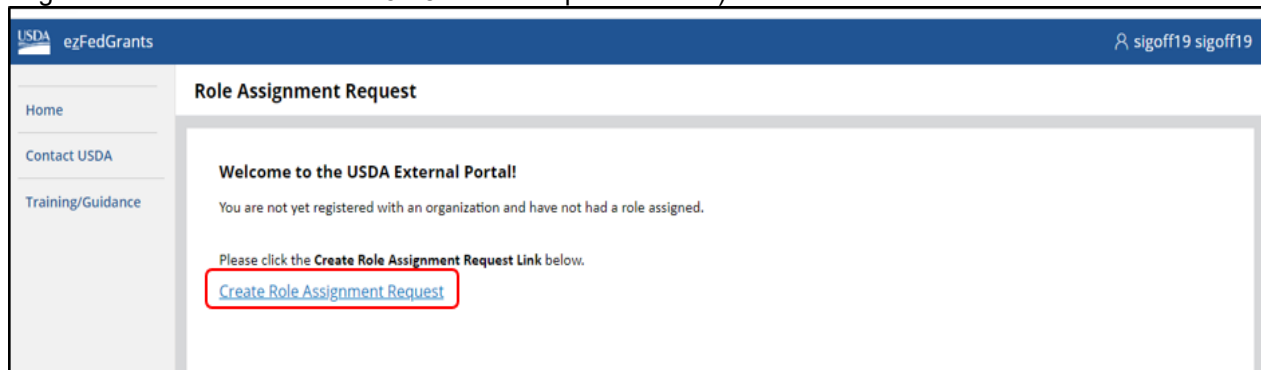
Launch the ezFedGrants External Portal from the [OCFO ezFedGrants website](#) and log in with your Login.gov verified identity account.

For questions regarding ezFedGrants access, including logging-in and eAuthentication, please review the [eAuthentication/Login.gov FAQs](#).

### Creating a Role Assignment Request

1. Click the **Create Role Assignment Request** link when you reach the **ezFedGrants External Portal Home** screen.

**Note:** If you see other tiles, such as **Opportunities**, **Applications**, and **Claims**, instead of the **Role Assignment Request** link, then you already have access to ezFedGrants. You can submit a Role Assignment Request for additional organizations through your **User Profile** (click your **Initials** in the upper-right corner and then select **Profile** on the dropdown menu).





## Role Assignment Request

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#### Select Role

First, you must select a primary user role. The actions available for each primary user role are summarized below. Please refer to the [ezFedGrants External Portal User Roles Quick Reference](#) for complete definitions.

- **Grants Administrative Officer (GAO):** Prepares applications, claims, repayment requests, and reports. Can sign reports, repayment requests, and claims. Manages user roles, access, and work items for other users within the same organization.
- **Grants Processor (GP):** Prepares applications, claims, repayment requests, and reports. Can sign reports, repayment requests, and claims.
- **Signatory Official (SO):** Prepares reports. Signs applications, agreements, and amendments. Can sign reports, repayment requests, and claims.

*You can only have one primary user role and your role will be the same for all organizations.*

If you select the wrong role, you can edit your request, or the reviewer can change your assigned role when reviewing your Role Assignment Request. If the reviewer approves your request with the incorrect role, your role can be changed by a user with the GAO role. Please refer to the **ezFedGrants Role and Access Management Job Aid** for more information.

1. On the **Role Assignment Access** screen, select **Grants Administrative Officer, Grants Processor, or Signatory Official** from the **User Role** field dropdown menu.

If you select the Grants Administrative Officer (GAO) role, select an agency from the **Agency** field dropdown menu. This agency will review your Role Assignment Request if you request access for an organization that does not already have ezFedGrants users or does not have a current GAO. Furthermore, this field **does not** affect your ezFedGrants access, it is simply for access approval purposes.

Request Access RA-15761

Print Cancel Next >>

1. Role Selection 2. Organization 3. Personal Information

**Role Selection**

\* User Role

**Access Request Comments**

\* Why are you submitting this access request?

2. In the **Access Request Comments** text box, explain why you are submitting this Role Assignment Request or why you have requested a particular role.

Role Assignment Request RA-49223

Print Close Withdraw Save Next >>

1. Role Selection 2. Organization 3. Personal Information

**Role Selection**

\* User Role

Signatory Official

**Access Request Comments**

\* Why are you submitting this access request?

Test for ENCH11373

**Additional Information**

3. Click the **[Next]** button.

Print Cancel Next >>



## Role Assignment Request

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### Select Organization(s)

Now you must select at least one organization for which you will complete grants and agreements management activities in ezFedGrants (submitting applications, claims, reports, etc.). You can be affiliated with multiple organizations, but you do not have to include every organization on your initial Role Assignment Request. Refer to the [Working with Multiple Organizations in ezFedGrants Quick Reference](#) for more information.

In the ezFedGrants System, each organization is identified by a unique ID, such as a UEI number. Small organizations may have only one UEI number, but larger organizations may have multiple UEI numbers under a single institutional umbrella (such as separate departments or campuses of a single university).

After your Role Assignment Request is approved, if you selected the wrong organization, separate from an organization, or otherwise no longer require ezFedGrants access for an organization, a user with the GAO role can deactivate your access for that organization.

1. On the **Role Assignment Request** screen, click the **[Add Organization]** button to open the **Search Organization** popup window.

Role Assignment Request RA-49223

Print Close Withdraw Save << Previous Next >>

✓ 1. Role Selection 2. Organization 3. Personal Information

**Select Organization(s)**

Click Add Organization to search for an organization you want to join. After selecting an organization, it will appear below. You must select at least one organization to submit your access request. Organizations must be registered on SAM.gov and have a record in the ezFedGrants System to be available for selection here. If your organization has not previously registered on SAM.gov, please complete the registration process at <https://sam.gov>. If your organization is registered on SAM.gov but does not appear here, please use the Contact USDA link on the left to contact the ezFedGrants Help Desk. Please include your organization's DUNS Number and CAGE code (if known) in your message.

If you are affiliated with multiple organizations, click Add Organization again to add more organizations.

Please provide Point of Contact (POC) details for each organization. A POC is someone from the organization who can verify your affiliation with that organization, if necessary.

Click Remove to remove an organization you do not want to join.

**Add Organization**

2. In the **Search Organization** popup window, complete at least one **Search Criteria** field. It's encouraged to enter your organization UEI only in the search criteria and then click the **[Search]** button.

The **Organization** field will search by organization title as it appears in the ezFedGrants System, which is derived from SAM.gov and/or IRS records. If you are unsure of your organization's registered title, please use another field.

**Select Organization**

**Search Criteria - please enter one or more criteria**

Organization Name UEI Number EFT Number CAGE Code

City State Postal Code Country

ASAP ID DUNS Number DUNS+4

Multiple search criteria narrows the search (works as a filter)

If you do not receive the results you are looking for, use fewer items in your search criteria. (i.e. Instead of City and State, remove City and leave only State)

**Search** **Clear** **Close**



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3. Locate your organization in the **Search Results** table, confirm that the details are correct (some organizations have multiple records or similar names/IDs), and then click the **Join Organization** link.

If the search does not return the correct record (or any record) for your organization, try changing your search criteria, double-check the UEI number or other ID on your organization's SAM.gov record, or contact the ezFedGrants Help Desk through the **Contact USDA** link on the left-side menu.

**Role Assignment Request RA-49223** [Print](#) [Close](#) [Withdraw](#) [Save](#) [<< Previous](#) [Next >>](#)

**Select Organization**

**Search Criteria - please enter one or more criteria**

Organization Name  UEI Number  EFT Number  CAGE Code

City  State  Postal Code  Country

ASAP ID  DUNS Number  DUNS+4

Multiple search criteria narrows the search (works as a **filter**)

If you do not receive the results you are looking for, **use fewer items** in your search criteria. (i.e. Instead of City and State, remove City and leave only State)

[Search](#) [Clear](#) [Close](#)

**Search Results**

Actions	Organization	UEI	EFT	DUNS Number	DUNS +4	CAGE Code	Street Address	City	State	Postal Code	Country
<a href="#">Join Organization</a>	UNIVERSITY OF FMMI LAB A	GGTESTUEI037	1234	111111222	1234		PO BOX 866	OXFORD	PA	17234-0866	US

4. Upon clicking **Join Organization**, the **Search Organization** popup window will close, and the selected organization's details will appear on the **Role Assignment Request** screen.

Complete the **Point of Contact Details** fields to identify a Point of Contact (POC) who can confirm your affiliation with this organization and/or your need for ezFedGrants access.

**Note:** If you selected the wrong organization, click the **[Remove]** button.

**Role Assignment Request RA-50220** [Print](#) [Close](#) [Withdraw](#) [Save](#) [<< Previous](#) [Next >>](#)

CRM Organization ID 1502308502	UEI GGTESTUEI038	EFT 0000	CAGE N/A
Street Address PO BOX 866	City OXFORD	State PA	Postal Code 17234-0866
Phone N/A	ASAP ID N/A	DUNS 012345678	DUNS+4 0000

**Point of Contact Details**

* Supervisory Point of Contact (POC) <input type="text" value="I Kavanaugh"/>	* School/Dept/Div/Prog. <input type="text" value="qa"/>	* POC Email <input type="text" value="laura.kavanaugh@usda.gov"/>	* POC Phone <input type="text" value="(999) 000-0000"/>
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5. Only one organization is required to submit a Role Assignment Request; however, if you are affiliated with multiple organizations (i.e. UEI numbers), you may wish to include all your organizations on this Role Assignment Request. Alternately, you can join additional organizations through your **User Profile** any time after your initial Role Assignment Request is approved.

Click the **[Add Organization]** button (at the bottom of the screen) to add another organization. Repeat until you have added all organizations. You must enter POC details for each organization even if they all have the same POC.

Request Access RA-39666

Click Add Organization to search for an organization you want to join. After selecting an organization, it will appear below. You must select at least one organization to submit your access request. Organizations must be registered on SAM.gov and have a record in the eFedGrants System to be available for selection here. If your organization has not previously registered on SAM.gov, please complete the registration process at <https://sam.gov>. If your organization is registered on SAM.gov but does not appear here, please use the Contact USDA link on the left to contact the eFedGrants Help Desk. Please include your organization's DUNS Number and CAGE code (if known) in your message.

If you are affiliated with multiple organizations, click Add Organization again to add more organizations.

Please provide Point of Contact (POC) details for each organization. A POC is someone from the organization who can verify your affiliation with that organization, if necessary.

Click Remove to remove an organization you do not want to join.

**Organization Details**

Remove

**EDUCATION, MICHIGAN DEPARTMENT OF**

CRM Organization ID	UEI	EFT	CAGE
1500032945	QJ9JQL1MM4	N/A	3U086
Street Address	City	State	Postal Code
605 W ALLEGAN STREET	LANSING	MI	48205-1524
Phone	ASAP ID	DUNS	DUNS+4
N/A	N/A	005336641	N/A

**Point of Contact Details**

* Supervisory Point of Contact (POC)	* School/Dept/Div/Prog.	* POC Email	* POC Phone
John Doe	Grants Team	john.doe@michigan.edu	(123) 456-7890

Add Organization

Additional Information

6. Once you have added all organizations you wish to include with your **Role Assignment Request**, click the **[Next]** button.

Role Assignment Request RA-50220

Print Close Withdraw Save << Previous Next >>

CRM Organization ID	UEI	EFT	CAGE
1502308502	GGTESTUEI038	0000	N/A
Street Address	City	State	Postal Code
PO BOX 866	OXFORD	PA	17234-0866
Phone	ASAP ID	DUNS	DUNS+4
N/A	N/A	012345678	0000

**Point of Contact Details**

* Supervisory Point of Contact (POC)	* School/Dept/Div/Prog.	* POC Email	* POC Phone
I kavanaugh	qa	laura.kavanaugh@usda.gov	(999) 000-0000



## Role Assignment Request

Job Aid

### Finalize Role Assignment Request

1. On the **Role Assignment Request** screen, complete the various **Work Contact Information** fields.

At minimum you must complete the **Occupation**, **Work Street Address**, **City**, **State**, **Postal Code**, **Work Phone**, and **Work Email** fields. Required fields are indicated with a red asterisk.

Role Assignment Request RA-50220

Print Close Withdraw Save << Previous Submit

**Work Contact - Address**

\* Occupation: qa

\* Work Street Address: 123 Main St.

Building or Room Number (Optional):

\* City: Slidell

\* State: Louisiana

\* Postal Code: 70458

Country: United States

**Work Contact - Phone and Fax Numbers**

\* Work Phone: (999) 000-0000

Country Code (Phone):

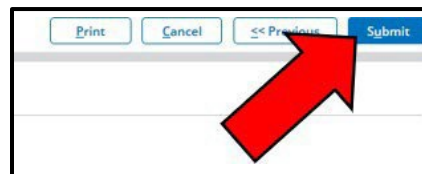
Extension:

Work Fax:

Country Code (Fax):

\* Work Email: laura.kavanaugh@usda.gov

2. Click the **[Submit]** button to submit your **Role Assignment Request**.



3. Upon successful submission, you will see a confirmation message and a list of reviewers who have received your **Role Assignment Request**. If you included multiple organizations, you will see a separate list of reviewers for each organization.

Role Assignment Request (RA-50220)

Print Close

**Status:**  
Submitted

Your request has been submitted to the administrator(s) listed below and your request will be emailed to you.

**SOUTHSORE COLLEGE** RA-50220

Name	E-Mail	Phone
GAO 11	laura.kavanaugh@usda.gov	(999) 999-1111
GAO 13	lester.wheeler@usda.gov	(504) 555-5555

**NORTHSORE COLLEGE** RA-50221

Name	E-Mail	Phone
JASON WAGONER	jason.wagoner@usda.gov	(202) 123-1567
RAMIN MAJIDZADA	abc@abc.com	(123) 123-1234
GAO 12	laura.kavanaugh@usda.gov	(555) 555-5555



## Role Assignment Request

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**“No Grants Administrative Officer (GAO)” Error:** This error occurs if you select the Grants Processor (GP), or Signatory Official (SO) role *and* you select an organization for which there are currently no ezFedGrants users or the organization does not currently have a GAO. The first user to submit a **Role Assignment Request** for an organization in ezFedGrants must select the GAO role; therefore, no one can submit GP or SO **Role Assignment Request** for this organization until the GAO’s **Role Assignment Request** is approved (by a USDA agency). If you see the “No GAO” error, you must either remove the organization from your **Role Assignment Request** (and select a different organization, if your request only includes one organization), or change the role request to GAO, or discard the **Role Assignment Request** and wait until a GAO has been approved.

4. Close and verify the **Role Assignment Request** for your organization in progress. You should receive a confirmation email when your **Role Assignment Request** is approved. If you included multiple organizations on your **Role Assignment Request**, each organization must be approved separately; however, you will have access to ezFedGrants as soon as one organization is approved (you will only have access to agreements and other actions for approved organizations).

ezFedGrants sigoff19 sigoff19

Home  
Contact USDA  
Training/Guidance

### Role Assignment Request

**Welcome to the USDA External Portal!**

You are not yet registered with an organization and have not had a role assigned.

Below is a list of cases pending approval (per organization). Please click on the Case ID link to **review** or **edit** the request.

Review/Edit	Role	Organization	Create Date	Approver
<a href="#">RA-50220</a>	Signatory Official	SOUTHSHORE COLLEGE	9/26/23	Org Grant Admin Officer
<a href="#">RA-50221</a>	Signatory Official	NORTHSHORE COLLEGE	9/26/23	Org Grant Admin Officer

5. When your **Role Assignment Request** is approved by your organization GAO or the USDA Agency representative, you can verify the role associated with your account simply by logging into ezFedGrants, click on your name displayed in the top right-hand corner, then click on “Switch Roles” from drop down menu as depicted in screenshot below.

sigoff19 sigoff19

Home

Signatory Official **Switch Roles**

Profile

Log off

**News and Notes**

No items

**Actionable Items**

Category Organization Filter



## Role Assignment Request

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### Review Role Assignment Request

After submitting the Role Assignment Request, users will have the ability to review their role assignment requests if needed. Below are the steps to review your submitted Role Assignment Request.

1. Click on your request link and select **Review Request**.

#### Role Assignment Request

**Welcome to the USDA External Portal!**

You are not yet registered with an organization and have not had a role assigned.

Below is a list of cases pending approval (per organization). Please click on the Case ID link to **review** or **edit** the request.

Review/Edit	Role	Organization	Create Date	Approver
<a href="#">RA-50237</a>	Signatory Official	UNIVERSITY OF FMMI LAB A	10/2/23	Org Grant Admin Officer
<a href="#">RA-50238</a>	Signatory Official	SOUTHSHORE COLLEGE	10/2/23	Org Grant Admin Officer

Review Request

Edit Role

View Approvers

Withdraw Request

2. You can review your submitted **Role Assignment Request** as below:

#### Role Assignment Request (RA-50238)

PrintClose

**Status:**  
Submitted

Role Selection

Organization

Personal Information

Approvers

**Role Selection**

User Role  
Signatory Official

**Access Request Comments**

Why are you submitting this access request?  
ENHC11373

**Additional Information**



## Role Assignment Request

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### Edit Role Assignment Request

The user will have the option to edit their role assignment request once submitted.

1. Click on the **Role Assignment Request Number Link** and select **Edit Role**.

Welcome to the USDA External Portal!

You are not yet registered with an organization and have not had a role assigned.

Below is a list of cases pending approval (per organization). Please click on the Case ID link to **review** or **edit** the request.

Review/Edit	Role	Organization	Create Date	Approver
<a href="#">BA-50228</a>	Grant Administrative Officer	ARCHBOLD EXPEDITIONS, INC.	9/28/23	Org Grant Admin Officer

[Review Request](#)  
[Edit Role](#)  
[View Approvers](#)  
[Unavailable Organization Approver](#)  
[Withdraw Request](#)

2. You can select a different **User Role** from the dropdown menu. Enter text into the **Role Assignment Request Comments** box and select **Submit**.

Request

USDA Ex

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pending a

Ap

Org

### Edit Role

**Role Selection**

\* User Role

Signatory Official

**Access Request Comments**

\* Why are you submitting this access request?

ENHC11373

[Cancel](#) [Submit](#)



## Role Assignment Request

Job Aid

### View Approvers

This section demonstrates how to view the person(s) assigned to approve a Role Assignment Request.

1. To view the person(s) assigned to approve a Role Assignment Request, click on the **Request Link**, and select **View Approvers** from the dropdown list.

Welcome to the USDA External Portal!

You are not yet registered with an organization and have not had a role assigned.

Below is a list of cases pending approval (per organization). Please click on the Case ID link to **review** or **edit** the request.

Review/Edit	Role	Organization	Create Date	Approver
BA-50228	Grant Administrative Officer	ARCHBOLD EXPEDITIONS, INC.	9/28/23	Org Grant Admin Officer

[Review Request](#)  
[Edit Role](#)  
[View Approvers](#)  
[Unavailable Organization Approver](#)  
[Withdraw Request](#)

2. The list of Approvers will be displayed in a pop-up window.

registered with an organization and have not had a role assigned.

cases pending approval (per organization). Please click on the Case ID link to **review** or **edit** the request.

### View Approvers

Name	E-Mail	Phone	Last Signon
GAO 13	lester.wheeler@usda.gov	(504) 555-5555	09/29/2023 03:56 PM

App  
Org  
Org



## Role Assignment Request

Job Aid

### Withdraw Role Assignment Request

This section demonstrates how to withdraw a submitted Role Assignment Request.

1. To withdraw a **Role Assignment Request**, click on the desired request link and select **Withdraw Request**.

Below is a list of cases pending approval (per on

Review/Edit	Role
<a href="#">RA-50237</a>	Signatory Of
<a href="#">RA-50238</a>	Signatory Of

Review Request

Edit Role

View Approvers

Withdraw Request

2. Enter explanation into the **Notes** field and click **Submit**.

External Portal

Withdraw Request

Are you sure you want to withdraw this request?

Note

ENHC11373

Cancel

Submit



## Role Assignment Request

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### Unavailable Organization Approver

The “Unavailable Organization Approver” option is only used when the GAO for your organization is unavailable to approve your request and you have requested the GAO role. Below are the steps to reroute your request to the agency.

1. Click on the **Role Assignment Request** link and select **Unavailable Organization Approver**.

**Role Assignment Request**

**Welcome to the USDA External Portal!**

You are not yet registered with an organization and have not had a role assigned.

Below is a list of cases pending approval (per organization). Please click on the Case ID link to **review** or **edit** the request.

Review/Edit	Role	Organization	Create Date	Approver
<a href="#">RA-50229</a>	Grant Administrative Officer	ARCHBOLD EXPEDITIONS, INC.	9/29/23	Org Grant Admin Officer

- Review Request
- Edit Role
- View Approvers
- Unavailable Organization Approver
- Withdraw Request

2. If your organization's GAO has not signed in within the last two weeks, you will be presented with the below screen. Select the **Re-Route Request** check box. Click **Submit**.

**Role Assignment Request**

**Welcome to the USDA External Portal!**

You are not yet registered with an organization and have not had a role assigned.

Below is a list of cases pending approval (per organization). Please click on the Case ID link to **review** or **edit** the request.

Review/Edit	Role	Organization	Create Date	Approver
<a href="#">RA-50229</a>	Grant Administrative Officer	ARCHBOLD EXPEDITIONS, INC.	9/29/23	Org Grant Admin Officer

**Re-route To Agency**

Please select the Re-Route check box to re-route your request from your organization's Grant Administrative Officer to the Agency.

☐ Re-Route Request

[Cancel](#) [Submit](#)



## Role Assignment Request

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3. Your **Role Assignment Request** will show that the request has been rerouted to the agency for approval.

### Role Assignment Request

**Welcome to the USDA External Portal!**

You are not yet registered with an organization and have not had a role assigned.

Below is a list of cases pending approval (per organization). Please click on the Case ID link to **review** or **edit** the request.

Review/Edit	Role	Organization	Create Date	Approver
<a href="#">RA-50229</a>	Grant Administrative Officer	ARCHBOLD EXPEDITIONS, INC.	9/29/23	Agency: NIFA

4. If there is a GAO that has signed in within the last two weeks, you will see this screen. If there is no approver available, please contact the ezFedGrants help desk at [ezfedgrants-cfo@usda.gov](mailto:ezfedgrants-cfo@usda.gov).

ezFedGrants

OCE OCE-ST-AP-B

### Role Assignment Request

**Welcome to the USDA External Portal!**

You are not yet registered with an organization and have not had a role assigned.

Below is a list of cases pending approval (per organization). Please click on the Case ID link to **review** or **edit** the request.

Review/Edit	Role	Organization	Create Date	Approver
<a href="#">RA-14852</a>	Grant Administrative Officer	ARCHBOLD EXPEDITIONS, INC.	9/29/23	Agency: NIFA

#### Re-route To Agency

Your request is not eligible to re-route the approval since at least one of your approvers has signed in within the last two weeks.

Please use the list below to contact one of your organization approvers to expedite your request.

Please contact the USDA help desk if all approver(s) have left your organization.

Name	E-Mail	Phone	Last Signon
Test ARS2	celiacarson@gmail.com	(123) 456-7890	04/06/2021 03:47 PM
Test ARS	celia.carson@gmail.com	(202) 720-9999	12/07/2022 12:22 PM
ARS ARS-ST-GL-App	TEST2@GMAIL.COM	(999) 999-9999	07/26/2023 01:58 PM
app pro1001	developer@sampledata.net	(111) 555-0987	07/19/2023 03:03 PM
Fresh Opp	FreshOpp@test.com	(123) 123-1234	07/20/2023 03:59 PM
GAO1 GAO1	celia.carson@usda.gov	(123) 456-7890	05/12/2023 11:10 AM
GAO External	test@test.com	(123) 123-1234	02/27/2020 12:10 PM
TEST GAO	celiacarson@gmail.com	(123) 456-2222	08/31/2023 12:05 PM
TEST GAO 2	celia.carson@comcast.net	(123) 456-7890	01/10/2023 03:50 PM

CancelSubmit



## Role Assignment Request

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### See Also

#### Job Aids

- [Using ezFedGrants - The Basics Job Aid](#)
- [ezFedGrants External Portal User Roles Quick Reference](#)
- [Working with Multiple Organizations in ezFedGrants Quick Reference](#)

#### ezFedGrants Hyperlinks

- [ezFedGrants Home page](#)
- [ezFedGrants FAQs general](#)

#### External Hyperlinks

- [SAMs for Unique Entity Identifier](#)

#### Need Help?

Contact: [ezfedgrants-cfo@usda.gov](mailto:ezfedgrants-cfo@usda.gov)

### Version Control

Date	Changes Made
Feb. 2025	Updated hyperlinks
March 2024	Updated Verbiage and Links
Oct 2023	Updated Verbiage and Screenshots to reflect the new enhancement in Pega.
Oct 2023	Updated Verbiage and Screenshots to reflect the new enhancement in Pega.
May 2023	Updated Verbiage and Screenshots
July.2023	Updated PDF Attachment Language
May 2022	Removed DUNS screenshots Add link to SAMs
April 2022	Removed Broken Links
Jan. 2022	Updated OCFO website link
Oct 2021	Updated "Need Help" section
Sept. 2019	Initial document created