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# **eRA Commons PD Account**

Prepared for SAMHSA Grantees/Applicants

April 10, 2017

- The purpose of this deck is to show grantee/applicant Signing Officials (SO) how to create an eRA Commons account for their Project Directors (PD) that are proposed/named on SAMHSA grants and if the PDs already have an account, how to affiliate their existing account with the organization
- Obtaining an eRA Commons account allows the PD to view grant-related documentation as well as initiate post-award requests (e.g., post-award amendments and non-competing continuations)

- Grantee Process: Slide 4
- Log Into the eRA Commons and Navigate to the Account Management System (AMS): Slides 5-7
- Research Existing Accounts/Profiles and Determine Next Steps: Slides 8 – 12
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# Grantee Process

## Organization Registration and SO Account Creation

- Obtain Dunn and Bradstreet Number (DUNS), if needed
- Read the instructions and select Register Now
- Complete the Register Grantee Organization fields and Save
- Click on email hyperlink to verify the SO email address
- Receive registration status (i.e., approved or rejected)
- If approved, click on email hyperlink and confirm the registration process
- Select Yes on the IPF Assignment View screen
- SO receives email with username and temporary password
- SO logs in, changes password, and selects Accept

## PD Account Creation

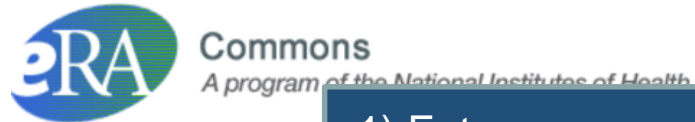
- SO logs into the Commons
- Select Admin, Accounts, and Accounts Management
- Enter Search Criteria for the PD
- Research profiles
- Create new account



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# SO: Log into the eRA Commons

- Navigate to the following website: <https://public.era.nih.gov/commons>



Commons Login ?

\*Required field(s)

\*Username

\*Password

Login Reset

(For External Users Only)

(For External Users)

[Forgot Password/Unlock Account?](#)

Federated Institutions/Organizations ?

Select..



Sign in

1) Enter username and password

2) Select Login

## Welcome to the Commons

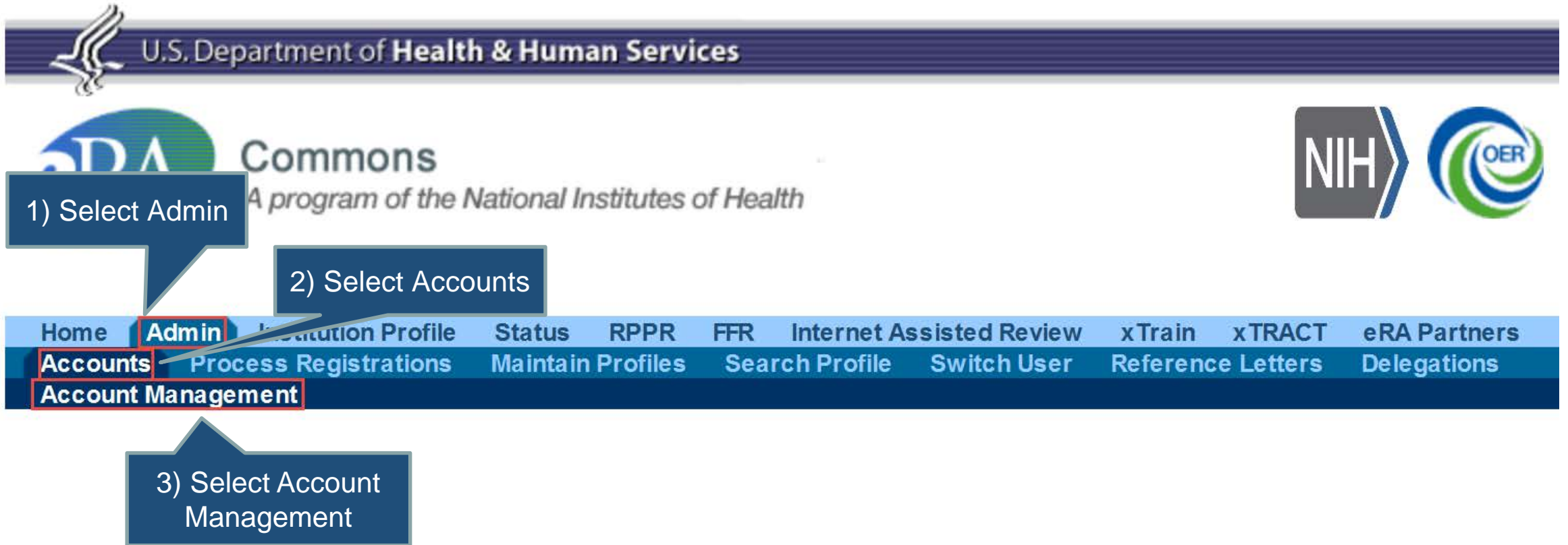
**i** System Notification Message

All systems are currently available.

**Scheduled Commons Maintenance:** For maintenance information, see the [eRA Scheduled Maintenance Calendar](#).

### Support Related Resources

- **Electronic Submission:** Learn about the most frequent application errors at [Avoiding Common Errors](#).
- **Electronic Application Submission:** To learn about completing and submitting an electronic grant application and access helpful resources, visit the [Applying Electronically website](#).
- **eRA Home Page:** To find Commons [FAQs](#), [User Guides](#), training materials, and step-by-step instructions for performing tasks in Commons, visit the [eRA website](#).



The screenshot shows the top navigation bar of the eRA Commons website. The header includes the U.S. Department of Health & Human Services logo and the text "U.S. Department of Health & Human Services". Below this is the "eRA Commons" logo and the text "A program of the National Institutes of Health". On the right side, there are logos for "NIH" and "OER".

The navigation menu is displayed in a blue bar with the following items: Home, Admin, Registration Profile, Status, RPPR, FFR, Internet Assisted Review, xTrain, xTRACT, eRA Partners, Accounts, Process Registrations, Maintain Profiles, Search Profile, Switch User, Reference Letters, and Delegations. The "Admin" and "Accounts" items are highlighted with red boxes. A callout box labeled "1) Select Admin" points to the "Admin" item. A callout box labeled "2) Select Accounts" points to the "Accounts" item. Below the navigation bar, a callout box labeled "3) Select Account Management" points to the "Account Management" link, which is also highlighted with a red box.

1) Select Admin

2) Select Accounts

3) Select Account Management



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# SO: Search for the PD

Note: The Account Management System (AMS) will open in a separate window/tab

Note: You can use % wild cards when conducting a search; for example, you could search for Chris% and the results will be provided for Chris and Christopher



AMS  
Manage Accounts AMS User Reports

1) Ensure that the Commons displays as the User Type

2) Enter search criteria (e.g., first and last name)

3) Select Search

## Search Accounts ?

Search Criteria

**NOTE!** You must enter at least one search field, besides User Type and Account Status.

User Type Commons	Account Status All	User ID
Last Name	First Name	Mid Name
Organization(s)		
Email	Roles	

Search Clear

# SO: Review Search Results

1) Select the hyperlink for each entry to view a list of applications and review committees to help you determine which account/profile is applicable, if any

Note: In this example, there is one account (i.e., Active) and three profiles (i.e., Profile Only) as indicated in the Account Status column

Search Accounts ?

Search Criteria

Search Results

Showing 1 - 4 of total 4

User ID	Name <span>?</span>	Email	Account Status	Roles & Affiliations	Action
ENTERPRISE	<a href="#">Kirk, James</a>	eRATest@od.nih.gov	Active	PI ABC University PI DEF University PI GHI University ... <a href="#">read more</a>	<a href="#">Manage</a>
	<a href="#">Kirk, James</a>		Profile Only		<a href="#">Create</a>
	<a href="#">Kirk, James</a>	123@a.com	Profile Only		<a href="#">Create</a>
	<a href="#">Kirk, James</a>	123@a.com	Profile Only		<a href="#">Create</a>

2) For accounts, select Manage to review additional information

Create New Account

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# SO: Review Active Account

1) Review the User Information, Contact Information, and Roles sections to determine if this is the PD's account

Note: You could validate the User ID (i.e., ENTERPRISE) with the PD

## User Information

User Type

Commons

User ID

ENTERPRISE

Primary Organization

Monroe County Public Health Department

## Contact Information

Last Name

Kirk

First Name

James

Middle Name

Email

eRATest@od.nih.gov

Confirm Email

eRATest@od.nih.gov

## Roles ?

+ Affiliate

1) Review the list of organization's and determine if your organization is listed or not

Role(s)	Organization(s)
PI	ABC University
PI	DEF University
PI	GHI University

## Funding Support

Name Kirk James

Filter:

1) Review the funding support for each profile

Note: There will be a row for each project and review committee that was aligned to this profile

Showing 1 - 10 of total 60

Show  per page « 1 2 3 4 5 6 »

The NIH Support page lists the NIH application information associated with the selected **Principal Investigator (PI)**. Use this information to positively identify PIs associated with your institution.

Name ▲	Institution Name ◆	Support Type ◆	Support Identification ◆	Support Description ◆	Support Start Date ◆	Support Status ◆
Kirk James	Starfleet Academy	Principal Investigator	1H79SM123456-01	How to defeat the Borg	2015-09-25	Awarded


# SO: Determine the Appropriate Scenario

Scenario 1	Scenario 2	Scenario 3	Scenario 4
PD already has an account that is affiliated to the SO's organization	PD already has an account that is NOT affiliated to the SO's organization	PD doesn't have an account, but he/she does have a profile	PD doesn't have an account or a profile
<b>Next Steps:</b> N/A, PD can access applicable information	<b>Next Steps:</b> Affiliate existing account	<b>Next Steps:</b> Convert profile to account	<b>Next Steps:</b> Create account and affiliate

**Scenario 2**

# SO: Affiliate Account to Organization


1) For accounts, select Manage to review additional information

Search Accounts 

Search Criteria

Search Results

Showing 1 - 4 of total 4

User ID	Name 	Email	Account Status	Roles & Affiliations	Action
ENTERPRISE	<a href="#">Kirk, James</a>	eRATest@od.nih.gov	Active	PI ABC University PI DEF University PI GHI University ... <a href="#">read more</a>	<a href="#">Manage</a>
	<a href="#">Kirk, James</a>		Profile Only		<a href="#">Create</a>
	<a href="#">Kirk, James</a>	123@a.com	Profile Only		<a href="#">Create</a>
	<a href="#">Kirk, James</a>	123@a.com	Profile Only		<a href="#">Create</a>

Create New Account

 Back to top

## Roles ?

+ Affiliate

1) Select Affiliate  
under the Roles  
section

Role(s) ▲	Organization(s)
PI	ABC University
PI	DEF University
PI	GHI University

AMS | Add Roles

Note: You will only be able to affiliate the PD's account to your organization

**Organization**

Starfleet Academy

**Role(s)** (to multi-select, please use ctrl c

- GRADUATE\_STUDENT - Graduate Student
- PACR - Public Access Compliance Person
- PI - Principal Investigator**
- POSTDOC - POSTDOC
- PROJECT\_PERSONNEL - Project Personnel
- SCIENTIST - Scientist
- SO - Signing Official
- SPONSOR - Sponsor Users
- TRAINEE - Trainee
- UNDERGRADUATE - Undergraduate

1) Select PI –  
Principal  
Investigator from  
the dropdown menu

2) Select  
Add Role(s)

Close

Add Role(s)

Note: You may remove the roles aligned to your organization

## Roles ?

+ Add Roles    x Unaffiliate

Showing 1 - 4 of total 4

Role(s) ▲	Organization(s)	▼ Action
PI	Starfleet Academy	<input type="button" value="x Remove"/>
PI	ABC University	
PI	DEF University	
PI	GHI University	

1) View results

2) Select Save





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## Scenario 3

# SO: Convert profile to account

### Search Accounts

Search Criteria

### Search Results

Showing 1 - 4 of total 4

User ID	Name	Email	Account Status	Roles & Affiliations	Action
ENTERPRISE	<a href="#">Kirk, James</a>	eRATest@od.nih.gov	Active	PI ABC University PI DEF University PI GHI University ... <a href="#">read more</a>	<a href="#">Manage</a>
	<a href="#">Kirk, James</a>		Profile Only		<a href="#">Create</a>
	<a href="#">Kirk, James</a>	123@a.com	Profile Only		<a href="#">Create</a>
	<a href="#">Kirk, James</a>	123@a.com	Profile Only		<a href="#">Create</a>

Create New Account

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1) Select Create for the profile you wish to convert to an account

**Scenario 3**

# SO: Complete Fields and Add Roles

## Create Account ?

All fields are required unless they're marked *(Optional)*

### User Information

User Type

User ID

Primary Organization

### Contact Information

Last Name

First Name

Middle Name *(Optional)*

Email

Confirm Email

Roles ?

1) Enter required information (e.g., User ID and email addresses)

2) Select Add Roles

1) Select PI – Principal Investigator Role

AMS | Add Roles ×

**Organization**

Starfleet Academy

**Role(s)** *(to multi-select, please use ctrl or shift keys)*

- GRADUATE\_STUDENT - Graduate Student
- PI - Principal Investigator**
- POSTDOC - POSTDOC
- PROJECT\_PERSONNEL - Project Personnel
- SCIENTIST - Scientist
- SPONSOR - Sponsor Users
- TRAINEE - Trainee
- UNDERGRADUATE - Undergraduate

Close Add Role(s)

2) Select Add Role(s)

Note: You may remove the roles aligned to your organization

### Roles ?

1) View results

Showing 1 - 1 of total 1

Role(s) ▲	Organization(s)	Action ▼
PI	Starfleet Academy	<input type="button" value="x Remove"/>

2) Select Create



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# Scenario 3

# SO: Resend Email (if necessary)

Note: The PD must access his/her email to use the link and complete the additional steps

Note: After the PD completes the steps, then NIH must perform a final review before the status is changed from Pending to Active

## Search Accounts ?

Search Criteria

## Search Results

Showing 1 - 4 of total 4

User ID	Name ?	Email	Account Status	Roles & Affiliations	
ENTERPRISE	<a href="#">Kirk, James</a>	eRATest@od.nih.gov	Active	PI ABC University PI DEF University PI GHI University <a href="#">... read more</a>	
SIZZLE	<a href="#">Kirk, James</a>	123@a.com	Pending	PI Starfleet Academy	<a href="#">Resend Email</a>
	<a href="#">Kirk, James</a>		Profile Only		<a href="#">Create</a>
	<a href="#">Kirk, James</a>	123@a.com	Profile Only		<a href="#">Create</a>

1) Select Resend Email if needed

Create New Account

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**Scenario 4**

# SO: Create new account

Note: If none of the accounts/profiles look correct, then create a new account

Note: The create new account steps are the same as in Scenario 3

Search Accounts ?

Search Criteria

Search Results

Showing 1 - 4 of total 4

User ID	Name ?	Email	Account Status	Roles & Affiliations	Action
ENTERPRISE	<a href="#">Kirk, James</a>	eRATest@od.nih.gov	Active	PI ABC University PI DEF University PI GHI University ... <a href="#">read more</a>	<a href="#">Manage</a>
	<a href="#">Kirk, James</a>		Profile Only		<a href="#">Create</a>
	<a href="#">Kirk, James</a>	123@a.com	Profile Only		<a href="#">Create</a>
	<a href="#">Kirk, James</a>	123@a.com	Profile Only		<a href="#">Create</a>

[Create New Account](#)

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1) Select Create New Account



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## Scenario 4

# SO: Create new account

### Search Accounts ?

#### ✘ ERROR!

We searched for accounts but **No Records were Found**. Here are several error resolution suggestions.

- Try to broaden your search by **adding more search parameters**.
- **Create an account**.

Note: You can also create a new account from the search screen if there aren't any existing accounts/profiles with the PD's name

Note: The create new account steps are the same as in Scenario 3

### Search Criteria

Search only within my organization ⓘ

**NOTE!** You must enter at least one search field, besides User Type and Account Status.

#### User Type

Commons ▼

#### Account Status

All ▼

#### Last Name

abcd

#### First Name

#### Email

#### Roles ⓘ

Search

Clear

1) Select  
Create New  
Account

Create New Account

- Role conflicts exist to assist with the separation of duties
  - For example, those with scientific roles (e.g., PI) must be on a separate account from an administrative role (e.g., SO)
  - If an individual needs both the PI and SO roles, then that person must establish two accounts (i.e., one for each role)



- NIH eRA Commons Online Help: <https://era.nih.gov/erahelp/Commons/default.htm>
- NIH eRA Account Management System (AMS) Online Help: [https://era.nih.gov/erahelp/ams\\_new/](https://era.nih.gov/erahelp/ams_new/)
- NIH eRA Service Desk: <http://grants.nih.gov/support/index.html>