

Managing User Accounts: Add or Remove Roles, Unaffiliate Account

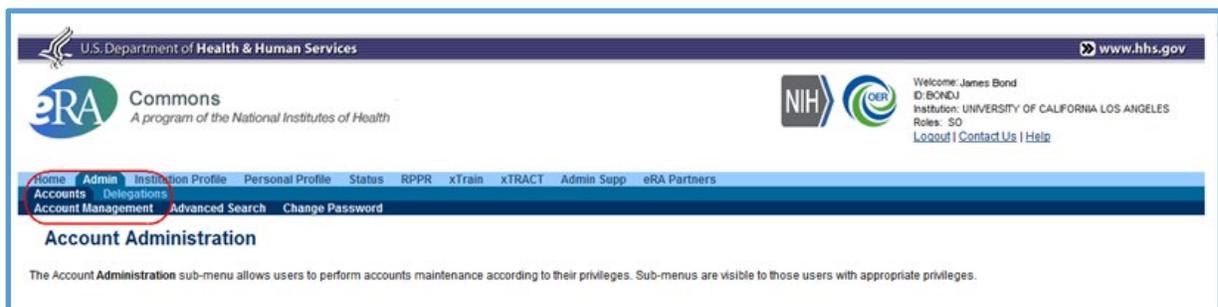
Commons account holders who hold the following roles with your organization can manage accounts:

- Account Administrator (AA)
- Administrative Official (AO)
- Business Official (BO)
- Signing Official (SO)

AMS user accounts may have the following statuses:

- **Active** — A valid account in good standing.
- **Deactivated** — Account has been disabled by an administrator
- **Locked due to inactivity** — Locked by the system due to inactivity (no user activity for 120 days)
- **Pending Affiliation** — An individual account that has not been linked to an organization
- **Profile Only** — A user ID that is not associated to an account

To manage the accounts affiliated with your organization, log in to Commons and access AMS via the **Admin --> Accounts --> Account Management** sub-menu tab, as shown here.



Click **Account Management** to open the *AMS Search Accounts* screen.

A screenshot of the 'AMS Search Accounts' screen. The page title is 'AMS' and the breadcrumb is 'Manage Accounts'. The main heading is 'Search Accounts'. Below this is a 'Search Criteria' section with a checkbox for 'Search only within my organization'. A note states: 'NOTE! You must enter at least one search field, besides User Type and Account Status.' The search form includes several fields: 'User Type' (dropdown menu with 'Commons' selected), 'Account Status' (dropdown menu with 'All' selected), 'User ID' (text input), 'Last Name' (text input), 'First Name' (text input), 'Middle Name' (text input), 'Email' (text input), and 'Roles' (text input). At the bottom left are 'Search' and 'Clear' buttons.

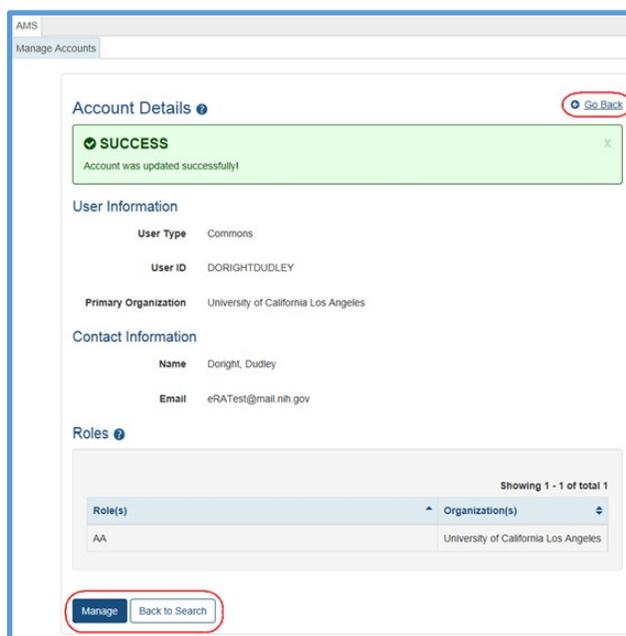
Use Manage Accounts to Perform One or More of the Following Steps:

1. Edit the **Email** addresses, if necessary.
2. To add or delete roles click the **+ Add Roles** button.
 - a. For more information, see [Add or Remove Role Assignments on Accounts within Your Organization](#) below or [Add/Delete Roles](#).

Note: Administrative and reporting roles such as SO, AA, AO, FSR, etc., cannot be combined with the PI role.
3. To affiliate an account with an organization, click the **Affiliate** button, if displayed.
 - a. For more information, see [Affiliate Account](#).
4. If the **Unaffiliate** button is present, you can click it to unaffiliate an account.
 - a. For more information, please see [Unaffiliate an Account from Your Organization below](#), or refer to [Unaffiliate Account](#).
5. If the account has been deactivated, a **Reactivate** button will be present at the bottom of the screen. Click it to reactivate the account. For more information, see [Reactivate Account](#).
6. When your changes are complete, click **Save** to save the changes or click **Cancel** to discard your changes.

When the **Save** button is clicked, the system displays the account manage screen with a confirmation message.

7. After saving, the following options are available:
 - a. To return to the *Search Accounts* screen displaying the previous search results, click the **Go Back** hyperlink.
 - b. To edit the account's information, click the **Manage** button.
 - c. To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.



Add or Remove Role Assignments on Accounts Within Your Organization

1. Search for the user with the username OR first and last name (not both.) The existing users should appear under **Search Results**.
2. Click '**Manage**' under the Action Column.

When the **Manage** button is clicked, the **Manage Accounts** screen opens.

The screenshot shows the 'Manage Account' interface. At the top, there are tabs for 'Manage Accounts' and 'Change Password'. A 'Go Back' button is in the top right. A note states: 'Note: Any changes to the account are not saved until you hit the save button. - For example, if you affiliate someone, he/she is not actually affiliated until you hit the save button.' Below this are sections for 'User Information' (User Type: Commons, User ID: BONDI007, Primary Organization: University of California Los Angeles), 'Contact Information' (Last Name: Bond, First Name: James, Middle Name: , Email: eraTest@mail.nih.gov, Confirm Email: eraTest@mail.nih.gov), and 'Roles'. The 'Roles' section has '+ Add Roles' and 'Unaffiliate' buttons. Below is a table with one row: 'AA' role at 'University of California Los Angeles' with a 'Remove' button. At the bottom are 'Save', 'Cancel', and 'Reset Password' buttons.

3. Select '**Add Roles**' (opens a list of roles.)

Add Roles screen:

- a) Scroll through the list and click to select the appropriate role(s).
Click the **Add Role(s)** button.

When you click **Add Roles(s)**, the system returns to the **Create Account** or **Manage Account** screen and displays the newly added role(s) as shown here:

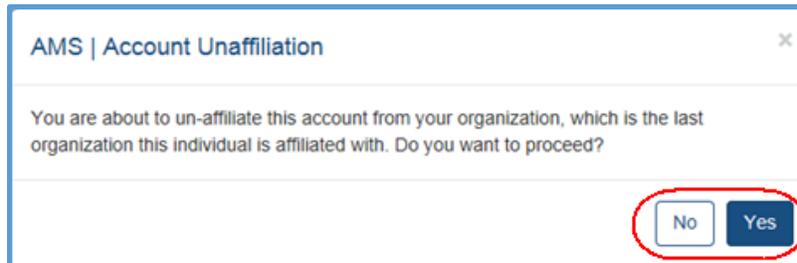
The 'Roles' screen has '+ Add Roles' and 'Remove All' buttons. It shows a table with one row: 'AA' role at 'University of California Los Angeles' with a 'Remove' button. The table header is 'Showing 1 - 1 of total 1'.

- b) To add additional roles, click the **+ Add Roles(s)** button and repeat the steps above.
- c) To remove a role, click the appropriate **Remove** button in the **Action** column.
- d) To remove all roles, click the **Remove All** button.

Unaffiliate an Account from Your Organization

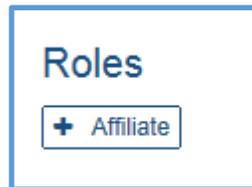
1. To remove the affiliation to your organization from an account, click the **Unaffiliate** button in the **Roles** section of the **Manage Account** screen.

When the **Unaffiliate** button is clicked, an **Account Unaffiliation** pop-up screen displays.



2. Click the **Yes** button to unaffiliate the account, or click **No** to cancel the unaffiliation.

When the **Yes** button is clicked, all roles assigned to the account are removed, the account is placed in **'Pending Affiliation'** status, and the **Affiliate** button appears in the **Roles** section of the **Manage Account** screen, as shown here:



Guidance Regarding Grants.gov AOR Credentials

1. On the final step of application submission, the SO will need to enter the **Grants.gov AOR (Authorized Representative)** credentials. These are not the same as the eRA Commons User ID and password.
2. To verify if you have the AOR role and that your account is active, log in to Grants.gov <https://apply07.grants.gov/apply/login.faces> and select **'My Account' – 'Manage Profile.'**
3. If you do have the role and are unable to submit your application, please try performing a password reset in Grants.gov.
4. If you have any questions about the AOR credentials, please contact Grants.gov directly: support@grants.gov, 1-800-518-4726. Please be sure to state that you need the **AOR credential information**, not the Grants.gov login.