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).
Table of Contents

- 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
- Scenario 2 Affiliate Account to Organization: Slides 13 – 16
- Scenario 3 Convert Profile to Account: Slides 17 – 21
- Scenario 4 Create New Account: Slides 22 -23
- Miscellaneous Tips: Slide 24
- Resources: Slide 25
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
SO: Log into the eRA Commons

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

1) Enter username and password
2) Select Login
1) Select Admin

2) Select Accounts

3) Select Account Management
SO: Search for the PD

1) Ensure that the Commons displays as the User Type

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

3) Select Search

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.
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

2) For accounts, select Manage to review additional information
1) Review the User Information, Contact Information, and Roles sections to determine if this is the PD’s account

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

Note: You could validate the User ID (i.e., ENTERPRISE) with the PD
1) Review the list of organization’s and determine if your organization is listed or not

<table>
<thead>
<tr>
<th>Role(s)</th>
<th>Organization(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI</td>
<td>ABC University</td>
</tr>
<tr>
<td>PI</td>
<td>DEF University</td>
</tr>
<tr>
<td>PI</td>
<td>GHI University</td>
</tr>
</tbody>
</table>
### Funding Support

**Name:** Kirk James

1) Review the funding support for each profile

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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Institution Name</th>
<th>Support Type</th>
<th>Support Identification</th>
<th>Support Description</th>
<th>Support Start Date</th>
<th>Support Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kirk James</td>
<td>Starfleet Academy</td>
<td>Principal Investigator</td>
<td>1H79SM12345 6-01</td>
<td>How to defeat the Borg</td>
<td>2015-09-25</td>
<td>Awarded</td>
</tr>
</tbody>
</table>

Note: There will be a row for each project and review committee that was aligned to this profile.
**SO: Determine the Appropriate Scenario**

**Scenario 1**
PD already has an account that is affiliated to the SO's organization

**Next Steps:** N/A, PD can access applicable information

**Scenario 2**
PD already has an account that is NOT affiliated to the SO's organization

**Next Steps:** Affiliate existing account

**Scenario 3**
PD doesn’t have an account, but he/she does have a profile

**Next Steps:** Convert profile to account

**Scenario 4**
PD doesn’t have an account or a profile

**Next Steps:** Create account and affiliate
### Scenario 2

**SO: Affiliate Account to Organization**

1) For accounts, select **Manage** to review additional information.

<table>
<thead>
<tr>
<th>User ID</th>
<th>Name</th>
<th>Email</th>
<th>Account Status</th>
<th>Roles &amp; Affiliations</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENTERPRISE</td>
<td>Kirk, James</td>
<td><a href="mailto:eIRATest@od.nih.gov">eIRATest@od.nih.gov</a></td>
<td>Active</td>
<td>ABC University</td>
</tr>
<tr>
<td></td>
<td>Kirk, James</td>
<td><a href="mailto:123@q.com">123@q.com</a></td>
<td>Profile Only</td>
<td>DEF University</td>
</tr>
<tr>
<td></td>
<td>Kirk, James</td>
<td><a href="mailto:123@a.com">123@a.com</a></td>
<td>Profile Only</td>
<td>GHI University</td>
</tr>
</tbody>
</table>

**Create New Account**

1. Back to top
## Scenario 2

1) Select Affiliate under the Roles section

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<td>DEF University</td>
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<tr>
<td>PI</td>
<td>GHI University</td>
</tr>
</tbody>
</table>
SO: Select PI Role

Scenario 2

1) Select PI – Principal Investigator from the dropdown menu

2) Select Add Role(s)

Note: You will only be able to affiliate the PD’s account to your organization
### SO: View and Save

**Scenario 2**

Note: You may remove the roles aligned to your organization.

<table>
<thead>
<tr>
<th>Role(s)</th>
<th>Organization(s)</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI</td>
<td>Starfleet Academy</td>
<td>Remove</td>
</tr>
<tr>
<td>PI</td>
<td>ABC University</td>
<td></td>
</tr>
<tr>
<td>PI</td>
<td>DEF University</td>
<td></td>
</tr>
<tr>
<td>PI</td>
<td>GHI University</td>
<td></td>
</tr>
</tbody>
</table>

1) **View results**

2) **Select Save**
Scenario 3

SO: Convert profile to account

1) Select Create for the profile you wish to convert to an account
SO: Complete Fields and Add Roles

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

2) Select Add Roles
Scenario 3

1) Select PI – Principal Investigator Role

2) Select Add Role(s)
Scenario 3

Note: You may remove the roles aligned to your organization

1) View results

<table>
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<th>Action</th>
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<tr>
<td>PI</td>
<td>Starfleet Academy</td>
<td>Remove</td>
</tr>
</tbody>
</table>

2) Select Create
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.

1) Select Resend Email if needed.
**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.

1) Select Create New Account
1) Select Create New 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.
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)
Resources

- 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/