
2. Enter Username and Password. Click Login.

   a. Note: This will open the Account Management System (AMS) in a separate window or tab.

4. Search for the PD
   a. First, ensure the User Type is set to Commons.
   b. Enter search criteria such as first and last name.
      i. You may use % wild cards if you are uncertain of a field. For Example, Chris% will return results for both “Chris” and “Christopher”.
   c. When you have entered your criteria, click Search.
5. Review the search results to determine if any of the results are applicable to the PD account you are creating.
   
a. You can click the hyperlinked Name of each account or profile to view a list of applications and review committees associated with name in order to narrow down the results.
   
b. For records that have accounts, not just a profile, you may also click the Manage button to access additional information.

6. If you select Manage for an active account, you will be able to review additional information as shown below:
   
a. You can also confirm with the PD if the information listed is correct in order to more accurately identify the right PD account.
b. Active accounts will also list the affiliated organization(s).

<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>

7. Profiles, which can be accessed by clicking the hyperlinked name after searching for accounts, will display the projects and review committees associated with the profile.

### Funding Support

<table>
<thead>
<tr>
<th>Name</th>
<th>Kirk James</th>
</tr>
</thead>
</table>

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>2015-06-25</td>
<td>Awarded</td>
</tr>
</tbody>
</table>
8. Once you have reviewed the PD profiles and accounts, evaluate the next steps. The steps above represent **Scenario 1**: 

<table>
<thead>
<tr>
<th>Scenario 1</th>
<th>Scenario 2</th>
<th>Scenario 3</th>
<th>Scenario 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>PD already has an account that is affiliated to the SO's organization</td>
<td>PD already has an account that is NOT affiliated to the SO's organization</td>
<td>PD doesn't have an account, but he/she does have a profile</td>
<td>PD doesn't have an account or a profile</td>
</tr>
</tbody>
</table>

**Next Steps:** N/A, PD can access applicable information | **Next Steps:** Affiliate existing account | **Next Steps:** Convert profile to account | **Next Steps:** Create account and affiliate |

---

**Scenario 2: Affiliating an existing account with your organization**

1. Click Manage for the correct PD account.

   ![Search Accounts](image)

   **Search Results**

<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 Jones</td>
<td><a href="mailto:kirk@enterprise.gov">kirk@enterprise.gov</a></td>
<td>Active</td>
<td>ABC University, DEF University, GHI University</td>
</tr>
<tr>
<td>Kirk Jones</td>
<td><a href="mailto:kirk@enterprise.gov">kirk@enterprise.gov</a></td>
<td>Profile Only</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kirk Jones</td>
<td><a href="mailto:kirk@enterprise.gov">kirk@enterprise.gov</a></td>
<td>Profile Only</td>
<td></td>
<td></td>
</tr>
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<td>Profile Only</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   ![Create New Account](image)

   ![Roles](image)

   ![Organization(s)](image)

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<td>PI</td>
<td>GHI University</td>
</tr>
</tbody>
</table>

2. Click Affiliate under the Roles section.
3. Your organization will be populated automatically. Select PI – Principal Investigator from the Role(s) drop-down menu and then click Add Role(s).

4. You will be returned to the Roles page, where you will need to click Save.
   a. If you have added an incorrect role, you may remove it with the Remove action.

Scenario 3: Converting a profile to an account

1. After identifying the correct profile, click Create.
2. Input the required information (User ID, email address, and email address confirmation) and then click Add Roles.

3. Select the PI – Principal Investigator role from the Role(s) list and then click Add Role(s).
4. Click Create to create the account. If you added a role by mistake, you may remove it by clicking the Remove button.

5. The PD must access their email to verify the account information is correct. If an email needs to be resent, the SO can resend it using the Resend Email button.
   a. Note: After the PD verifies their email address, NIH will perform a final review before the account status changes from Pending to Active.

Scenario 4: Creating and affiliating a new account

1. If no account or profile is correct, click Create New Account.
2. Input the required information (User ID, email address, and email address confirmation) and then click Add Roles.

Create Account

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

User Information

User Type
Commons

User ID

Primary Organization
University of California San Diego

Contact Information

Last Name
SZILAGYI
First Name
moira
Middle Name (Optional)

Email
Confirm Email

Roles

+ Add Roles

Create Clear

3. Select the PI – Principal Investigator role from the Role(s) list and then click Add Role(s).
4. Click Create to create the account. If you added a role by mistake, you may remove it by clicking the Remove button.

5. The PD must access their email to verify the account information is correct. If an email needs to be resent, the SO can resend it using the Resend Email button.
   
   a. Note: After the PD verifies their email address, NIH will perform a final review before the account status changes from Pending to Active.