



## Electronic Research Administration

Sponsored by: The National Institutes of Health, Office of Extramural Research



# eRA Commons Account Administration Basics

NIH Regional Workshop – 2008

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*eRA Customer Relationship Manager*



## Today's Agenda

- eRA Commons Account Administration Basics
  - What is eRA Commons?
  - How is the Commons used?
  - What is an eRA Commons “role”?
  - Account Administration
  - eRA password policy
  - Delegation
  - Locked accounts
  - Institution Profile
  - Personal Profile

**eRA** **Electronic Research Administration**  
 Sponsored by: The National Institutes of Health, Office of Extramural Research

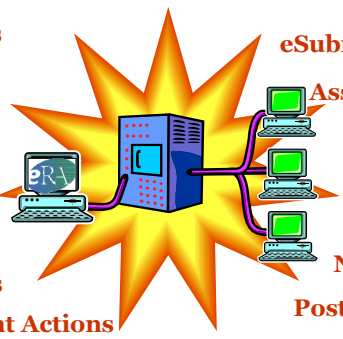


# eRA Commons Account Administration Basics



**eRA** **What is eRA Commons?**

- The eRA Commons is an online interface where grant applicants, grantee organizations, grantees and federal staff can access, share, and transmit administrative information related to their applications and grants.



<b>Applications</b>	<b>eSubmission Errors/Warnings</b>
<b>Assurances</b>	<b>Assembled Application Image</b>
<b>Certifications</b>	<b>Review Assignment</b>
<b>Profile Data</b>	<b>Priority Score</b>
<b>Progress Reports</b>	<b>Summary Statement</b>
<b>Financial Reports</b>	<b>Notice of Award</b>
<b>Invention Reports</b>	<b>Post-Award Correspondence</b>
<b>Training Appointment Actions</b>	

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## How is the Commons used?

Application  
Submission  
Process

- Review errors/warnings identified during the submission process
- Check final application image for assembly issues

Application  
Intake at  
Receipt &  
Referral

- View information on the review assignment of your grant application

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## How is the Commons used?

Peer Review  
Process

- View Summary Statement & Priority Scores

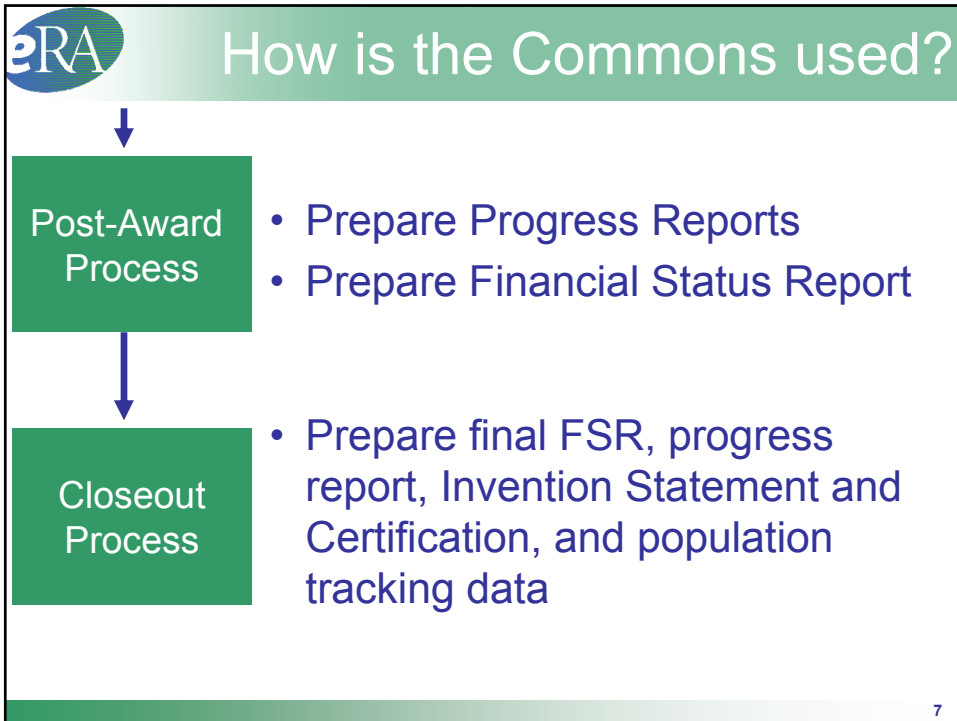
Pre-Award  
Process

- Submit Just-In-Time Data (e.g., other support, certifications)

Award  
Process

- View Notice of Award (NoA)

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## eRA eRA Commons Layout

- Commons is laid out in a tertiary (3) menu fashion. The top tabs show the main functions which can drill-down two (2) levels of sub-menus.

Electronic Research Administration  
**eRA Commons**  
 Sponsored by National Institutes of Health  
 Version 2.14.3.1

Home Admin Institution Profile Personal Profile Status eSNAP xTrain Links eRA Partners Help

Accounts Delegate PI Delegate PPF Edit Delegate Status Change Password Verify NIH Support Delegate xTrain Authority

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## What is an eRA Commons “role”?

- The functions available to users are based on the “role” associated with their account
  - [http://era.nih.gov/files/eRA\\_Commons\\_Roles.pdf](http://era.nih.gov/files/eRA_Commons_Roles.pdf)
  - A single account should not have both the PI and SO roles. A person that needs both roles should have two separate accounts (one with the PI role and one with the SO role)
  - If a PI serves as a Reviewer, their single account can have both the PI and Internet Assisted Review (IAR) roles without any issue

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## Account Administration

The Account Administration sub-menu allows users to perform accounts maintenance according to their privileges. Sub-menus are visible to those users with appropriate privileges.

As an administrator always check with Principle Investigator to see if Commons account already exists and affiliate it.

The screenshot shows the 'Create Affiliation' form in the eRA Commons system. The form includes a navigation bar with 'Home', 'Admin', 'Institution Profile', 'Personal Profile', 'Status', 'eSNAP', 'xTrain', 'FSR', 'Links', 'eRA Partners', and 'Help'. Below the navigation bar, the 'Accounts' sub-menu is active, showing options for 'Create Account', 'Create Affiliation', 'Maintain Account', 'Delegate Submit', 'Delegate PPF Edit', and 'Change Password'. The 'Create Affiliation' form has a red asterisk indicating required fields. The 'Account Information' section includes 'User ID:\*' and 'Email Address:\*' fields, both highlighted in yellow. The form also has 'Submit' and 'Cancel' buttons.

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# Account Administration

Home Admin Institution Profile Personal Profile Status eSNAP xTrain FSR Links eRA Partners Help

Accounts  
Create Account Create Affiliation Maintain Account Delegate Submit Delegate PPF Edit Change Password

## Account List

Search Criteria

Role: ALL AA AO ASST PI SO  
Hold down Ctrl key to do multiple select or to deselect.

Account Status: All

Name: Last First


User ID:

Search Clear

Account Search Results 1 - 3 out of 3 records Prev 1 Next All

User Name	User ID	Email Address	Account Status	Last Updated	Role	Action
<a href="#">gibb_texas</a>	TEIFSRPI	<a href="mailto:gibbs@od.nih.gov">gibbs@od.nih.gov</a>	Active	3/19/2008 8:48:28	FSR PI	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Delegate PI</a>
<a href="#">gibb_texas</a>	TEIFSRSO	<a href="mailto:gibbs@od.nih.gov">gibbs@od.nih.gov</a>	Active	3/19/2008 21:24:58	FSR SO	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Create Account</a>
<a href="#">Salk_Jonaa</a>			Not Affiliated			

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## Hands-on: Accessing Commons

- Open an Internet connection and go to the appropriate eRA Commons non-production environment:
  - Commons Demo  
<https://commonsdemo.era.nih.gov/commons-demo/>
  - External User Acceptance Test (Ext-UAT)  
<https://commons.uat.era.nih.gov/commons/>
- Enter the Username and password provided by your trainer
  - eRA Commons is not case sensitive

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## Hands-on: create an affiliation

- Click on Account
- Click on Maintain Account
- Select account status “all”, (do not do this at home)
- Click “create account” link next to Jonas Salk

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## Password Policy

- Password Policy document  
[http://era.nih.gov/docs/NIH\\_eRA\\_Password\\_Policy.pdf](http://era.nih.gov/docs/NIH_eRA_Password_Policy.pdf)
- Password standards:
  - At least eight (8) non-blank characters
  - Must contain a mixture of letters, numbers and these special characters: ! # \$ % \* - \_ = + < >
  - First and last characters cannot be numbers
  - Cannot contain username
  - Cannot be reused within one (1) year

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# eRA What if I forget my password?

- Click the “**Forgot Password**” link found directly beneath the Commons Login fields
- Enter Username and email address then select Submit
  - If the Username and email combination match the Username and email combination in the system, a temporary password will be emailed

Commons Login ?

\* indicates required field.

Username \*

Password \*

Login Reset

[Forgot Password?](#)

Version 2.14.3.1

Home Links eRA Partners Help

Reset Password ?

\* indicates required field.

User ID \*

Email Address \*

Submit Cancel

# eRA Admin – Change Password

Home Admin Institution Profile Personal Profile Status eSNAP xTrain Links eRA Partners Help

Accounts

Delegate PI Delegate PPF Edit Delegate Status **Change Password** Verify NIH Support Delegate xTrain Authority

Change Password ?

**Change Password**

New password must meet the following standards:

- At least eight (8) non-blank characters in length
- Must contain a mixture of letters, numbers and special characters: !# \$ % \* - \_ = + < >
- First and last characters cannot be numbers
- Cannot contain username
- Cannot be reused within one (1) year

Your password will be changed immediately in eRA production (IMPP) applications. For IRDB applications - such as OVR - password changes will take effect within one hour.

For additional guidance, please review the [eRA Password Policy](#).

This will change your password

This will change your password

\* indicates required field

Change Password Form

Current Password: \*

New Password: \*

Retype New Password: \*

Submit Clear Cancel

**Enter current and new password**





# Resetting a password for a user and unlocking an account

To Lock or Unlock an Account select the radio button

In Maintain Accounts, edit account, click on Reset Password radio button



# Admin - Delegation

- The Administration screen provides the functionality to delegate (and revoke) authority to perform specific functions to other eRA Commons users



## Admin - Delegation

### – **Delegate PI (can be done by SO for PI)**

- Delegation can be made to any eRA Commons user at the PI's institution with the Assistant (ASST) role
- Provides ability to complete eSNAP information for the PI's grants (cannot Route or Submit)

### – **Delegate PPF Edit**

- Delegation can be made to any other eRA Commons user at the institution
- Provides ability to edit Personal Profile (PPF) information

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## Admin - Delegation

### – **Delegate Status**

- Delegation can be made to any eRA Commons user at the PI's institution with the Assistant (ASST) role
- Provides access to PI's status information including the ability to check for application submission errors/warnings and to view the assembled application image
- DOES NOT provide access to application summary statement or priority score

### – **Delegate xTrain Authority**

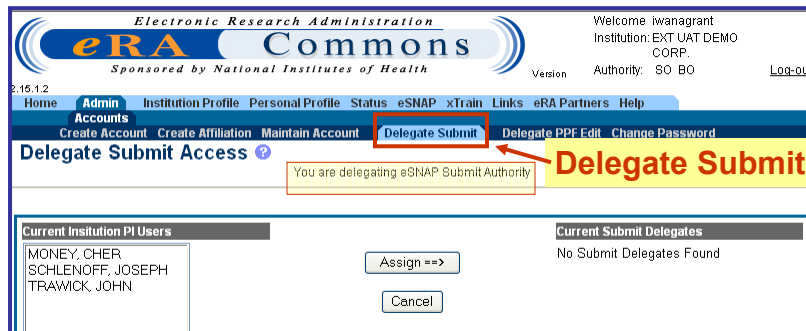
- Delegation can be made to any eRA Commons user at the PI's institution with the Assistant (ASST) role
- Provides all the same authority within xTrain as the Project Director/Principal Investigator except for the ability to submit appointments to Agency

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# Delegation to PI

- Signing Official (SO) can “*Delegate Submit*” authority to a PI
  - Allows a PI to submit his/her own eSNAP information to Agency

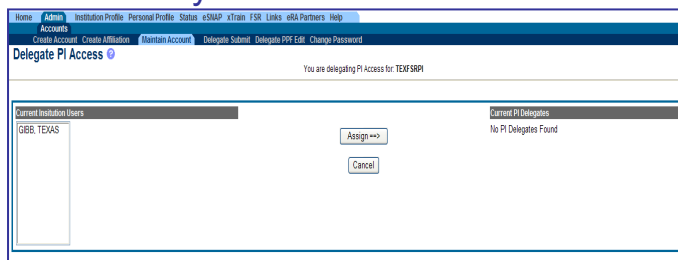


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# Hands-on - Delegation

1. Navigate to the **Admin->Accounts->Maintain Account** tab
2. Click on Delegate PI link next to the PI in your list
3. Select **Assign** to provide authority
4. Select **Save** when **Delegate PI Status Confirmation** screen appears
5. Repeat activity by selecting **Delegate Submit**



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# Electronic Research Administration

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## Institution Profile



# Institution Profile

Home Admin **Institution Profile** Personal Profile Status eSNAP xTrain Links eRA Partners Help  
Basic Assurances and Certifications

- The **Institution Profile** (IPF) area of Commons enables users to view and/or update institution information based on your privileges
  - SO can edit
  - PIs and ASSTs have read-only access



### Hands-on – Institution Profile

Click on the *Institution Profile* tab in the menu bar to view the Institution Profile of your workshop account.

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## Editing the Institution Profile

Home Admin Institution Profile Personal Profile Status eSNAP xTrain FSS Links eRA Partners Help

Basic Assurances and Certifications Maintain Org Hierarchy Institution Usage

### Edit Institution Profile

View Edit

\* Indicates required field

Basic Institution Information

Institution Name: NIH

Preferred Institution Name: nih

IPF Code: 10016506

NOA E-mail: gibbs@od.nih.gov Policy Announcements and Notifications Email Address: gibbs@od.nih.gov

DUNS Number: 123478859

Indirect Cost Negotiator: Jane Doe Most Recent Date of Negotiation: 03/20/2007

Human Subjects Assurance Number: FWA00000000 Animal Welfare Assurance Number: A123400000

Type of Organization: Institution of higher education

Type Of Organization - Other:

Ownership Control: Private, Nonprofit Independent

eSNAP Institution Self Registration: Enabled

Institution Address

Street 1: 6706 Rockledge Drive City: Bethesda

Street 2: State/Province: MARYLAND

Street 3: Zip Code: 20817

Street 4: Country: UNITED STATES

Phone Number: 301-123-4567 Fax Number: 301-123-4568

Institution Contact Information

Contact Name: John Smith

Phone Number: 301-123-4567

Email: gibbs@od.nih.gov


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## Hands - on: Edit Institutional Profile

1. Chose Institutional Profile
2. Chose Basic
3. Click on Edit Link – Edit field
4. Click on Submit
5. Chose Assurances and Certifications and edit fields where necessary

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# Electronic Research Administration

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## Personal Profile



# Personal Profile (PPF)

Home Admin Institution Profile **Personal Profile** Status eSNAP xTrain Links eRA Partners Help

Personal Information Race/Ethnicity Employments Reviewer Address Residential Address Degrees Publications Reference Letters Trainee-Specific

- Single Point of Ownership
  - Your PIs are responsible for keeping your information current and correct
  - Very few staff members at NIH have access to change information (for emergencies only)
- Periodically the system will require you to change your password for security reasons
  - After you change your password you will be placed in the Personal Profile tab - take a moment to review and update your information

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## Did you know...

### Information from a PI's Personal Profile is...

...used to verify information submitted in grant applications.

If your profile is not current, errors or warnings may be generated during the application submission process.

...used for Agency notifications.

If your profile is not current, we may not be able to contact you. Since many of these notifications are now automatic, we may not even be aware the notification did not reach you.

...used in aggregate reporting.

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## PPF – Personal Information

### Personal Information ?

\* indicates required field

#### Identifying Information

Name Prefix:	<input type="text"/>	First Name:*	<input type="text" value="Cher"/>
Middle Name:	<input type="text" value="D"/>	Last Name:*	<input type="text" value="Money"/>
Name Suffix:	<input type="text"/>	SSN:	<input type="text" value="123456789"/>
Gender:*	<input type="text" value="FEMALE"/>	DOB (MM/DD/YYYY):*	<input type="text" value="04/19/1966"/> Do Not Wish to Provide? <input type="checkbox"/>
Citizenship: (for non-US citizens and permanent residents) Required for participants in research training, fellowship, or career development programs	<input type="text" value="U.S. Citizen or Non-citizen National"/>	Citizenship Country:	<input type="text" value="UNITED STATES"/>
eRA Email:*	<input type="text" value="cumminss@mail.nih.gov"/> ←		

#### Disabilities (select all that apply)

<input type="checkbox"/> Hearing	<input type="checkbox"/> Vision
<input type="checkbox"/> Missing Extremities	<input type="checkbox"/> Nonparalytic Orthopedic
<input type="checkbox"/> Partial Paralysis	<input type="checkbox"/> Complete paralysis
<input type="checkbox"/> Speech	<input type="checkbox"/> Motor (temp code)
<input type="checkbox"/> Other	

Submit Reset Cancel

**TIP:** Keep your email address current. You will need access to your email if you forget your password. Also, NIH has transitioned to email for most grant-related communications.



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# PPF – Race/Ethnicity

- Information is used for aggregate reporting only.

**Race/Ethnicity** ⓘ

Content Management Test

\* indicates required field

**Current Information**

**Race(s):** White ;  
**Ethnicity:** Non-Hispanic

**New Information**

**Ethnicity:** \*  
Required if multiple races are selected  
Non-Hispanic

American Indian or Alaska Native  
 Asian  
 Black or African American  
 White  
 Native Hawaiian or Pacific Islander  
 Do Not Wish to Provide

**Race(s):** \*  
(Check all that apply)

Submit Reset Cancel

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# PPF - Employments

**Employment List**

Employments 1 - 1 out of 1 records Prev 1 Next

Employer	Start Date	End Date	E-mail	Preferred Address?	Action
EXT UAT DEMO CORP.	02/14/2004		mrelectronicsubmiss@od.nih.gov	true	Edit Delete

Add New Employment Close

Add New

Edit

**Add New Employment** ⓘ

\* indicates required field

Employer (select one)

NRI Recognized Institution: [Find]

NRI Institute or Center: [Find]

**Employment Information**

Start Date: [ ] End Date: [ ]  
Title: [ ] Employment Status: [ Full-Time ]  
Academic Rank: [ ] Position: [ ]  
Employment Type: [ Non Federal ] Is this your primary employment? [ ]

**Employment Address**

Line 1: [ ] City: [ ]  
Line 2: [ ] State: [ ]  
Line 3: [ ] Zip Code: [ ]  
Line 4: [ ] Country: [ UNITED STATES ]  
Phone: [ ] Fac: [ ]  
E-mail: [ ]

Is this your preferred employment address? [ ]

Submit Reset Cancel

**Employment Info** ⓘ

\* indicates required field

Employer (select one)

NRI Recognized Institution: [Find]

NRI Institute or Center: [Find]

**Employment Information**

Start Date: [ 02/14/2004 ] End Date: [ ]  
Title: [ ] Employment Status: [ Full-Time ]  
Academic Rank: [ ] Position: [ ]  
Employment Type: [ Non Federal ] Is this your primary employment? [ ]

**Employment Address**

Line 1: [ FLORIDA STATE UNIVERSITY ] City: [ TALLAHASSEE ]  
Line 2: [ 874 TradBons Way, 3rd floor ] State: [ FLORIDA ]  
Line 3: [ ] Zip Code: [ 323064166 ]  
Line 4: [ ] Country: [ UNITED STATES ]  
Phone: [ 555-123-4567 ] Fac: [ ]  
E-mail: [ mrelectronicsubmiss@od.nih.gov ]

Is this your preferred employment address? [ ] (Not editable if currently checked)

Submit Reset Cancel

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## PPF – Reviewer Address

- Only used if you are an NIH Reviewer with the IAR role

**Reviewer Address** ?

\* indicates required field

Reviewer Address

Line 1:*	<input type="text"/>	City:*	<input type="text"/>
Line 2:	<input type="text"/>	State:*	<input type="text" value=""/>
Line 3:	<input type="text"/>	Zip Code:*	<input type="text" value=""/>
Line 4:	<input type="text"/>	Country:*	<input type="text" value="UNITED STATES"/>
Phone:*	<input type="text" value=""/>	Fax:	<input type="text"/>
E-mail:*	<input type="text" value=""/>		

Submit Reset Cancel

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## PPF – Residential Address

- Home address

**Residential Address** ?

\* indicates required field

Residential Address

Line 1:*	<input type="text" value="123 My Home Road"/>	City:*	<input type="text" value="My City"/>
Line 2:	<input type="text"/>	State:*	<input type="text" value="MARYLAND"/>
Line 3:	<input type="text"/>	Zip Code:*	<input type="text" value="12345"/>
Line 4:	<input type="text"/>	Country:*	<input type="text" value="UNITED STATES"/>
Phone:*	<input type="text" value="555-123-4567"/>	Fax:	<input type="text"/>
E-mail:*	<input type="text" value="cumminss@mail.nih.gov"/>		

Submit Reset Cancel

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- Provide all degree information
  - Remember to include information on degrees in progress and the expected completion date

**List of Degrees** ?

Degrees 1 - 2 out of 2 records

Degree	Institution	Completion Date	Degree Completed?	Major	Action
BS: BACHELOR OF SCIENCE	HHS University	05/1997	Y		<a href="#">Edit</a> <a href="#">Delete</a>
MD: DOCTOR OF MEDICINE	Get Smart University	01/1998	Y		<a href="#">Edit</a> <a href="#">Delete</a>

Use Add New Degree button to provide additional degree information.

- Publication information is used in annual progress reports
- Pulls in manuscripts from NIH Manuscript Submission (NIHMS) and publications from PubMed and PubMedCentral.

Home Admin Institution Profile **Personal Profile** Status eSNAP xTrain Links eRA Partners Help

Personal Information Race/Ethnicity Employments Reviewer Address Residential Address Degrees **Publications** Reference Letters Train

**List of Publications** ?

As of May 2<sup>nd</sup>, 2005, NIH implemented the Public Access policy requesting that researchers upload their publication manuscripts into a secure archive. Please visit <http://www.nih.gov/about/publicaccess/index.htm> to view information about this policy. If you wish to upload manuscripts click the link provided below. This will take you to the NIH Manuscript System (NIHMS) where the upload process will be explained and you will be allowed to upload your manuscripts. You will automatically be logged into the system using your NIH eRA Commons user ID.

<https://commons.stage.era.nih.gov/commons/publicaccess/login.jsp>

Publications 1 - 1 out of 1 records Prev 1 Next

Citation Source	Citation ID	Citation Text	Action
PI		Varmus H, Klausner R, Zerhouni E, Acharya T, Daar A, Singer P. 2003. PUBLIC HEALTH: Grand Challenges in Global Health. Science 302(5644): 398?399. PMID: 243493	<a href="#">Edit</a> <a href="#">Delete</a>

**TIP:** Visit <http://publicaccess.nih.gov/> for information on new Public Access policies.





## PPF - Reference Letters

- Used for some grant programs
  - NIH Director's Pioneer Program (DP1)
  - New Innovator Award (DP2)
- Can see that the reference letter has been submitted, but not the letter itself

### List of Reference Letters

Reference Letter(s)							
Referee Name	Grant number	FOA number	Project title	Organization/Affiliation	Department	E-Mail	Submitted Date
Gibb, Scarlett	Not associated	RM07-005		nih	od	<a href="mailto:GIBBS@OD.NIH.GOV">GIBBS@OD.NIH.GOV</a>	Nov 27, 2007
Smith, John	Not associated	RM07-005		nih	od	<a href="mailto:GIBBS@MAIL.NIH.GOV">GIBBS@MAIL.NIH.GOV</a>	Nov 27, 2007

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## PPF – Trainee-Specific

- Information used for Training grant actions
  - Required for users with TRAINEE role

### Trainee-Specific Information

\* indicates required field

#### Statement of non-delinquency on U.S. Federal Debt

\* Are you delinquent on the repayment of any U.S. Federal Debt(s)? (If yes, explain in a textbox below)

No  Yes

If you answer Yes, you must provide an explanation or your Trainee action will not be pass the validation check prior to submission.

#### Disadvantaged background

\* Are you from a disadvantaged background?

No

Submit Reset Cancel

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## Hands-on – PPF Employments

- Navigate to the **Employments** page and edit the existing employment record.
  - Notice that the “preferred address” column is set to TRUE.
  - Click on the **Edit** link to the right of the employment listing.
- Enter a date in the END DATE field and click the **Submit** button. You will return to the Employments List page.
- Click the **Add New Employment** button and enter the required fields. Click the **Find** button next to the “NIH Recognized Institution” field to go to the search screen.
  - Enter all or part of an Institution name in the appropriate field and click **Search**.
  - Click the **Select** link next to one of the returned institutions in the hit list.  
**Hint: If you did not receive any institutions from your search, try University of Texas in the name field and search again.**
  - When you have returned to the Add New Employment page, enter the rest of the required fields. Leave the END DATE field blank. At the bottom of the page click the checkbox next to **Is this your preferred employment address?**
  - Click the **Submit** button to return to the Employments List page. Notice that the original entry is now FALSE under “preferred address” and your new entry is now set to TRUE.
  - Click the **Close** button.

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## Finding Help

### eRA Commons Help Desk

- Hours: Mon–Fri, 7 a.m. – 8 p.m. Eastern
- Web: <http://ithelpdesk.nih.gov/eRA/>
- Toll-free: 1-866-504-9552
- Phone: 301-402-7469
- TTY: 301-451-5939



**Don't forget to get a help desk ticket number if your issue isn't immediately resolved.**

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