
Account Management

For Administrative Users



Training Objectives

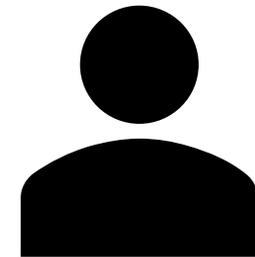


- Recap on Registration
- Signing Official (SO)/Account Administrator (AA) Responsibilities
- Institution Profile (IPF)
- eRA Commons User Accounts/Roles
 - Administrative Roles
 - Scientific Roles
- Account Management Module (AMM)
 - Currently Account Management System (AMS)
- Demonstration on How to Search, Create, and Modify Accounts in AMS
- Where Can I Get Help?

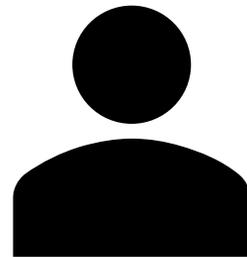
Recap on Registration



Once the applicant organization has successfully registered with eRA Commons, the following have been established in eRA Commons.



Signing Official
(SO)



Account
Administrator (AA)



Institution Profile
(IPF)



SO & AA Responsibilities



The **Signing Official (SO)** is responsible for:

- Completing the Institution Profile
- Creating new accounts (including additional Signing Official accounts)
- Making modifications to existing accounts

The **Account Administrator (AA)** is responsible for assisting the SO with:

- Creating new accounts
- Making modifications to existing accounts

Note: *The AA cannot create or modify an SO account*

Institution Profile (IPF)



The Institution Profile is a module in eRA Commons that is established upon registration. Each organization is assigned an IPF number, which is used for internal tracking.

The Institution Profile contains the following information:

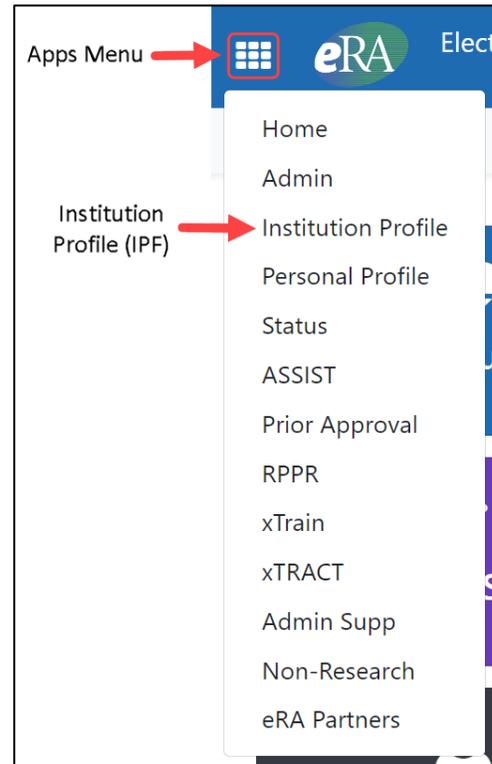
- Institution Name
- Institution Contact Information
- About the Institution
- Signing Officials
- Institution Address

All user accounts created within the organization have access to the Institution Profile, however it can only be updated by someone with the Signing Official (SO) role.

Institution Profile (IPF)



To access the Institution Profile, users will need to log into eRA Commons. They can click on the 'Apps' menu icon and click on 'Institution Profile'.



Institution Profile (IPF)



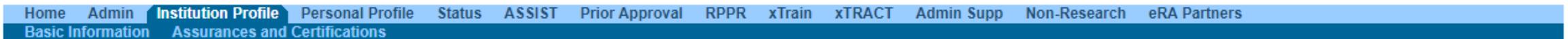
In the following screen, Signing Officials will see:



Institution Profile

The **Institution Profile** area of Commons enables users to view and update institution information according to their privileges.

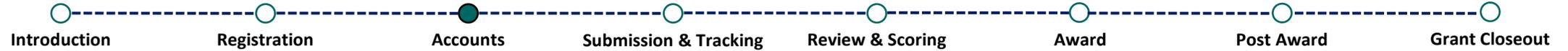
All other users will see:



Institution Profile

The **Institution Profile** area of Commons enables users to view and update institution information according to their privileges.

Institution Profile (IPF) – Basic Information



Institution Profile for
DOC TEST, LLC.
IPF Code: 455437780

- Basic Information
- Assurances & Certifications

Accounts:
1 Affiliated Accounts

Profile updated:
06/13/2023

ORI Certification Expires:
unknown

SAM Registration Expires:
No Registration Found!

eRA Service Desk
Hours: Mon-Fri, 7AM-8PM EDT/EST
Web: <http://grants.nih.gov/support>
Toll-free: 866-504-9552
Phone: 301-402-7469
Contact initiated outside of business hours via Web or voice mail will be returned the next business day.

Institution Basic Information ?

Institution Name	+ View All EDIT VIEW
Institution Contact Information	EDIT VIEW
About the Institution	EDIT VIEW
Indirect Cost Negotiations	EDIT VIEW
Signing Officials	VIEW
Institution Address	EDIT VIEW

+ View All

EDIT VIEW

EDIT VIEW

EDIT VIEW

EDIT VIEW

VIEW

EDIT VIEW

+ View All

Institution Profile (IPF)



Institution Basic Information ?

Institution Contact Information

+ View All Save All Discard Changes

Institution Address ?

—
HIDE

* Required Field(s)

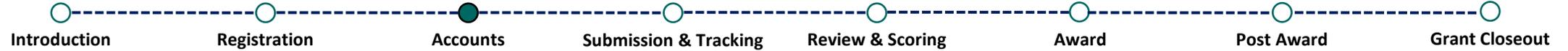
Institution Name ?

—
HIDE

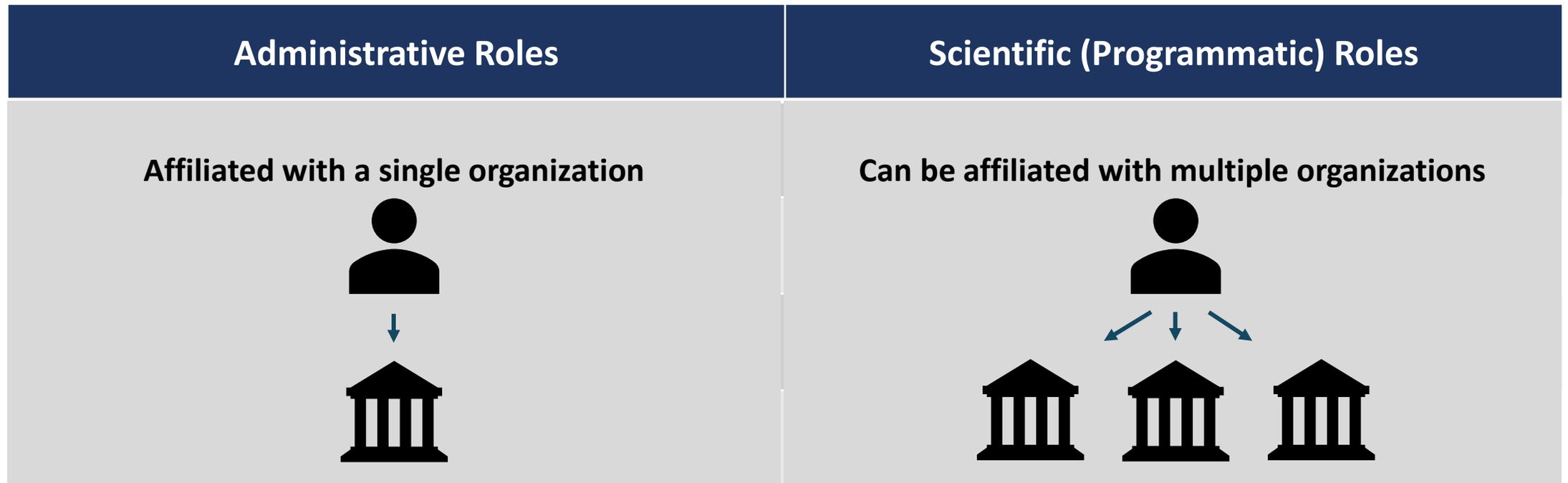
Profile Name:	DOC TEST, LLC.
Commons Preferred Name:	<input type="text"/>
*Zip/Postal Code:	<input type="text" value="20817"/>
*Phone:	<input type="text" value="301-555-5555"/>
Fax:	<input type="text"/>

+ View All Save All Discard Changes

eRA Commons User Accounts/Roles



Each eRA user must have their own account. Accounts should not be shared by multiple individuals. The following eRA Commons roles will be used by DOC:



A complete description of all available eRA Commons roles, including roles not utilized by DOC, is located here: [https://www.era.nih.gov/files/eRA Commons Roles.pdf](https://www.era.nih.gov/files/eRA_Commons_Roles.pdf).

Administrative Roles



Role	Description
Signing Official (SO)	Has authority to legally bind the institution in grants administration matters, register the organization in eRA Commons, create and manage additional accounts, view all grants within the organization, and submit various reports (excluding the Federal Financial Report {FFR}).
Administrative Official (AO)	Can create and manage additional accounts (excluding the SO), review all grants and various reports (excluding the Federal Financial Report {FFR}) within the organization for accuracy before the SO submits.
Account Administrator (AA)	Can create and manage additional accounts (excluding the SO).
Financial Status Reporter (FSR)	Can access the Federal Financial Report (FFR) module and submit financial reports.

Scientific Roles



Role	Description
Project Director/Principal Investigator (PD/PI)	Designated by the applicant organization to have the appropriate level of authority and responsibility to direct the project or program to be supported by the award. The PD/PI has access to their own grants and various reports (excluding the Federal Financial Report {FFR}).

Account Management Module (AMM)

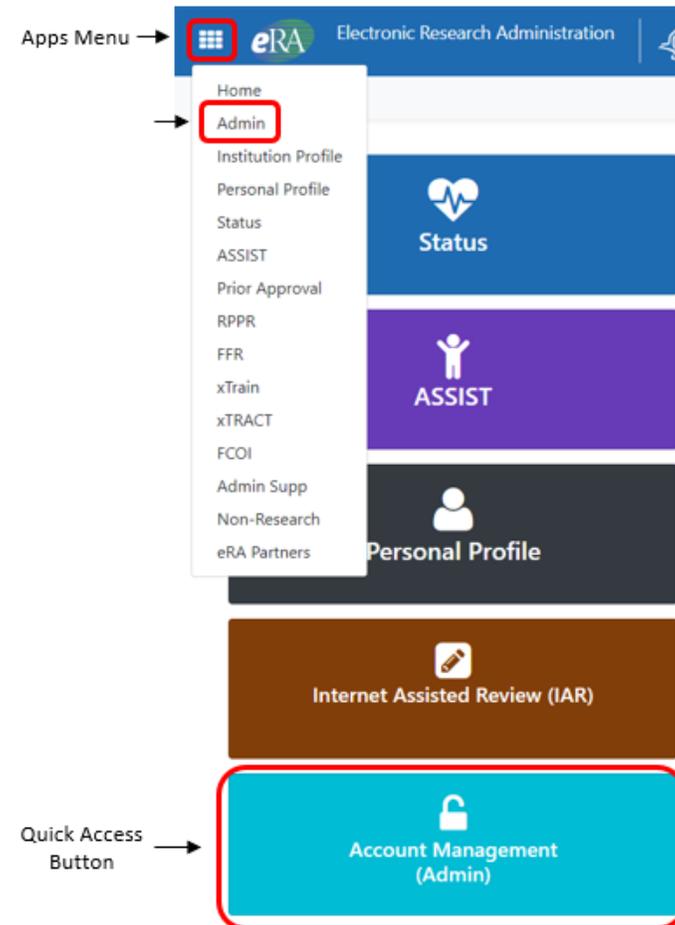


The Account Management Module (AMM) is a module within eRA Commons that can be accessed by users with either the Signing Official (SO), Administrative Official (AO), or Account Administrator (AA) role, to search, create, and manage all user accounts within their organization.

Account Management Module (AMM)



Once logged in, users will be able to access the Account Management Module (AMM) by clicking on the 'Apps' menu icon and selecting 'Admin' or clicking on the 'Account Management (Admin)' quick access button.



Account Management Module (AMM)



From the 'Admin' tab, users will need to click on 'Accounts', then 'Account Management'.

U.S. Department of Health & Human Services

eRA Commons
A program of the National Institutes of Health

NIH OER

Home **Admin** Institution Profile Personal Profile Status ASSIST Prior Approval RPPR FFR xTrain xTRACT FCOI Admin Supp Non-Research eRA

Accounts Delegations ESI Eligibility

Account Management Advanced Search Change Password

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.

Account Management Module (AMM)

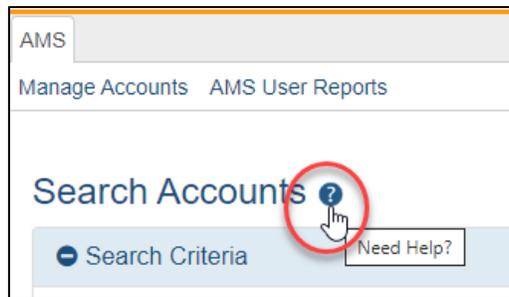


Demonstration

Where Can I Get Help?



If you are experiencing technical difficulties and need help, you have options!



-  eRA's Online Help
- Call and speak to an eRA Service Desk staff member
- Submit a ticket via <https://public.era.nih.gov/submithelp>

Online Resources:

- [Register | Accounts](#)
- [Institutional Profile](#)
- [Account Management System - User Guide](#)
- [eRA Commons Frequently Asked Questions](#)

eRA Service Desk

Hours of Operation:

Monday – Friday 7AM to 8PM Eastern Time
(closed on federal holidays)

Toll Free: (866) 504-9552

Phone: (301) 402-7469

**Press 1 for
eRA Commons
inquiries!**