Account Management – Information Sheet

All user accounts utilized by applicants and grantees/recipients are classified as eRA Commons external accounts and are further categorized into two main groups based on their functionalities, "Administrative" and "Scientific" (operational/project activity roles). These two group types have distinctive roles and responsibilities and cannot be combined in a single user account; Administrative roles can only be used on Administrative accounts and Scientific roles can only be used on Scientific accounts. If an individual is an administrator as well as a researcher/project activity facilitator, they will require two separate accounts, one for their Administrative role(s) and the other for their Scientific role.

Each eRA user must have their own account; accounts should not be shared by multiple individuals.

eRA Commons External User Account Role Responsibilities

Department of Commerce (DOC) will not use all the available eRA Commons external user account roles, instead only using the Signing Official, Administrative Official, Account Administrator, Financial Status Reporter, Program Director/Principal Investigator, and Internet Assisted Reviewer roles.

Signing Official (SO): The SO is an Administrative role that has institutional authority to legally bind the institution in grants administration matters, register the organization in eRA Commons, view all grants within the institution, including the status and award information, and create and manage additional accounts, including additional SO accounts.

Administrative Official (AO): The AO is an Administrative role that can review all grant applications within the institution for accuracy before the SO submits the finalized grant application and can create and manage all organizational accounts except for the SO role.

Account Administrator (AA): The AA is an Administrative role that is designated by the SO and facilitates the administration of the organization's Commons accounts except for SO accounts.

Financial Status Reporter (FSR): The FSR is an Administrative role that is responsible for reporting a grant's statement of expenditures through the Federal Financial Report (FFR) module in eRA Commons. Depending on an organization's workflow, it is possible for the SO or the AO to also have FSR responsibilities; the FSR role may be added to a single SO or AO account.

Program Director/Principal Investigator (PD/PI): The PD/PI (displayed in the system as "PI") is a Scientific role that is 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.

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.

Administrative Roles for Reporting		
Role Name	**Description**	**eRA Module Permissions**
SO (Signing Official)	The SO has institutional authority to legally bind the institution in grants administration matters and monitors grant-related activities within their organization. The SO can create, view, and modify all user accounts across their organization. The SO can submit grant applications via Grants.gov if they are registered as their organization's Authorized Organization Representative (AOR). The SO can view all submitted grant application details and submit progress reports across their organization. The SO role cannot be combined with the PD/PI role; separate accounts must be created if one person will hold both the SO and PD/PI roles.	<u>eRA Commons</u> Register the organization in Commons <u>Account Management Module (AMM)</u> Search, create and modify all SO, AO, AA, FSR, and PD/PI user accounts within the organization Search and create an affiliation between existing Scientific user accounts and their organization <u>Personal Profile (PPF)</u> View and modify their Personal Profile <u>Institution Profile (IPF)</u> View and update the organization's Institution Profile <u>Status</u> View the assembled image of submitted grant applications before they move on for further processing View the status of all grant applications originating from their institution Reject (withdraw) a grant application from consideration View award information for all grants awarded to the organization <u>Research Performance Progress Report (RPPR)</u> Initiate, view, modify, and submit progress reports
AO (Administrative Official)	The AO is an official within an external organization. Depending on an organization's workflow process, it is possible for the SO and AO to be the same person. In this case, only SO authority is used (SO authority supersedes AO authority), SO and AO authorities should not be combined.	<u>Account Management Module (AMM)</u> Search, create and modify AO, AA, FSR, and PD/PI user accounts within the organization Search and create an affiliation between existing Scientific user accounts and their organization

Administrative Roles for Reporting		
Role Name	**Description**	**eRA Module Permissions**
	The AO role also cannot be combined with the PD/PI role; separate accounts must be created if one person will hold both the AO and PD/PI roles.	Personal Profile (PPF) View and modify their Personal Profile Institution Profile (IPF) View the organization's Institution Profile Status View the status and award information of all grant applications originating from their institution Research Performance Progress Report (RPPR) View and modify progress reports
AA (Account Administrator)	The AA is designated by the SO or AO and facilitates the administration of the organization's AO, AA, and PD/PI user accounts. The AA role cannot be combined with the PD/PI role; separate accounts must be created if one person will hold both the AA and PD/PI roles.	Account Management Module (AMM) Search, create and modify AO, AA, FSR, and PD/PI user accounts within the organization Search and create an affiliation between existing Scientific user accounts and their organization Personal Profile (PPF) View and modify their Personal Profile Institution Profile (IPF) View the organization's Institution Profile
FSR (Financial Status Reporter)	The FSR is responsible for submitting the organization's Federal Financial Report, a statement of expenditures for a grant. Depending on the organization's workflow process, it is possible for the SO or AO to be responsible for submitting the FFR. As such, these two authorities may be combined on the same account. The FSR role cannot be combined with the PD/PI role; separate accounts must be created if one person will hold both roles.	Federal Financial Report (FFR) Create and submit the organization's FFR Personal Profile (PPF) View and modify their Personal Profile Institution Profile (IPF) View the organization's Institution Profile

Scientific (Operational/ Program Activity) Roles for Reporting		
Role Name	**Description**	**eRA Module Permissions**
PD/PI (Program Director/ Principal Investigator; displayed in the system as "PI")	The PD/PI directs a project or program supported by a DOC grant and completes the grant administration process. A PD/PI may only access information pertaining to the grant(s) on which they are the designated PD/PI. More than one PD/PI can be associated with a DOC-funded grant, contract, or cooperative agreement. Additional PD/PIs assist with the responsibilities currently accorded to a single PD/PI. The multiple-PD/PI model is intended to supplement, not replace, the traditional single-PD/PI model. The PD/PI role cannot be combined with the SO, AO, AA, or FSR roles; separate accounts must be created if one person will hold any Administrative role in addition to the PD/PI role.	Personal Profile (PPF) View and modify their Personal Profile Institution Profile (IPF) View the Institution Profile(s) they share an affiliation with Research Performance Progress Report (RPPR)* Initiate, view, and modify progress reports Status* View the assembled image of submitted grant applications before they move on for further processing View the status of all submitted grant applications View award information for all awarded grants *Applies only to applications for which they are designated PD/PI*

Logging In

eRA Commons users access the site from the Commons homepage (https://public.era.nih.gov/commonsplus). It is strongly recommended to use a bookmark to access the Commons homepage to avoid issues that can arise if a user were to attempt to access Commons using a search engine. Alternately, users can access the eRA homepage (https://www.era.nih.gov/) and click on the "Commons Login" button on the top left of eRA's homepage.

Every Commons user must use their own account; accounts are tied to a specific individual and should not be shared with other individuals. If a user needs access to Commons but does not yet have an account, they must contact their organization's SO, AO, or AA to have a new account created for them.

eRA is moving to require two-factor authentication for accessing its external modules, meaning that logging in will require something you know (password) and something you have (a phone or other device). eRA partner agency applicants/grantees are encouraged to move to two-factor authentication, but not required to at this time, except for grant application reviewers and applicants/grantees who also apply for or have an existing NIH grant. However, users with multiple eRA Commons accounts should hold off on moving to two-factor authentication until 2024, when a patch will be released that will allow users with more than one account to consolidate them into a single eRA account that contains all their organization affiliations and roles.

Currently, eRA Commons external users can log in using three of the four ways listed on the Commons homepage: "Login with Login.gov," "Login with eRA Credentials," and "Login with Federated Account."

Login with Login.gov

This method uses Login.gov, after a one-time association of your Login.gov account with your eRA Commons account.

Figure 1: eRA Commons Login with Login.gov

Steps for the Initial Setup at Login.gov

IMPORTANT: Make sure your eRA Commons account is active and you know your account password before attempting to complete the Login.gov process.

1. **Click on the Login.gov option on the eRA Commons homepage**. *Do not go straight to Login.gov to create your account or initiate the login process*. You will be presented with a "Confirmation Required" dialog. Click "Continue" and you will be redirected to the Login.gov page for NIH.

- If you already have a Login.gov account, enter your email address and password and click "Sign In." Complete the two-factor authentication method that you have already configured for your Login.gov account (text message, authentication application, etc.) and you will go directly to Step 3 below.

- Create a Login.gov account.

- Click the "Create an account" button on the initial Login.gov screen. You will be presented with the Login.gov Create Your Account screen. Follow the prompts to confirm your email address and choose an authentication method.

2. **Associate your Login.gov account with your eRA Commons account (one-time only).** You will be redirected back to eRA Commons' "Associate Your eRA Account" screen. Enter your eRA Commons username and password. Once your eRA credentials are accepted, your Login.gov account is successfully associated with your eRA Commons account.

Using Login.gov After Associating Your eRA Credentials With Your Login.gov Account

You will continue to retain and maintain your eRA username and password after registering with Login.gov; however, you must always use Login.gov to log into eRA Commons after associating your Login.gov account with your eRA credentials.

1. On the eRA Commons homepage, click on the **Login.gov** logo in the login section.

2. Log in to eRA Commons using your Login.gov credentials (email and password) and the additional authentication method you set up with your Login.gov account. You will be automatically taken to the eRA Commons landing screen.

- If you do not want to enter a code every time, click the box that states, "Remember this browser." If you always use the same browser and computer to log into eRA Commons, Login.gov will remember these settings and not require you to complete the two-factor authentication process each time you log in, and you will directly access the eRA Commons.

If you have trouble with the Login.gov process, contact the Login.gov help center (https://Login.gov/help/) or eRA Commons Support Desk (https://era.nih.gov/need-help).

Logging In Using eRA Credentials

External users with a Commons account can use the "Login with eRA Credentials" section in the upper left side of the Commons homepage to log into the Commons system.

Figure 2: Login with eRA Credentials

To use this method:

1. Open the eRA Commons homepage: https://public.era.nih.gov/commonsplus.

2. In the "Login with eRA Credentials" section in the upper left of the webpage, enter your user ID in the "Username" field.

3. Enter your password in the "Password" field.

- By default, password entries display as bullet characters, but you can click the small "eye" icon button next to the "Password" field to see the characters as typed in clear text.

- Click the "Login" button.

Resetting Your eRA Commons Password

If an external user account holder has forgotten their password or has been locked out of their account after five failed login attempts within a 120-minute window, their password can be reset using the "Forgot Password/Unlock Account?" link (https://public.era.nih.gov/ams/public/accounts/password/reset.era) found directly below the login fields in the "Login with eRA Credentials" section in the upper left of the Commons homepage.

Users will be taken to a page where they enter user ID in the "User ID" field and their email address in the "Email" field. A new temporary password that will be valid for 48 hours will be sent to the email account on file in the account holder's user profile.

Because the temporary password will be sent to the email address listed in their Commons account profile, they must be able to access that email account to get the new temporary password.

The user can also contact their organization's SO or AA, who have the privileges to reset the users access and prompt a new temporary password to be sent to the user using the email listed in the user's profile. If the user does not know who holds either role for their organization, they should contact the eRA Service Desk.

Upon logging in using a temporary password, the user will be prompted to change it.

eRA Commons Account Password Policy

The following list highlights the password requirements for eRA credentials:

- Must be at least fifteen (15) characters long
- Does not need to contain numbers, capital letters, or special characters
- May contain spaces
- Case-sensitive
- Should not include the user's name, address, phone number, Social Security Number, date of birth, user ID, or other personally identifiable information
- Cannot contain weak or overused terms such as "password"
- Should not match current or past passwords from their organizational or personal accounts
- Cannot reuse the previous ten eRA account passwords
- Must be changed once per year

Logging in Using an InCommon Federation Account

eRA Commons users at organizations participating in the InCommon Federation program (https://incommon.org/about/), which coordinates federated authentication across universities/institutions, can use their InCommon credentials to log into Commons, provided their organization supports NIH's two-factor authentication standard and the user has it enabled for their InCommon federated account.

Figure 3: Login with Federated Account

Applicable Commons account holders use this method:

1. **Click the text field directly below the "Login with Federated Account" option on the eRA Commons homepage**. Type part of your organization's name and then select the organization from the dropdown menu that appears as you type (which displays all InCommon Federation organizations that are supported).

- **Click the Login button**. You will be taken to your university's/institution's InCommon login screen where you will enter your university/institution credentials

- **You will be redirected back to eRA Commons** once you your organization has authenticated your credentials and automatically logged in if your organization's account is compliant with NIH's two-factor authentication standards.

- If the organization is not compliant, a message will inform you that your InCommon Federated account cannot be used, and you will be required to use a different login method described above.

InCommon Federated users who have already transitioned to use Login.gov can also use their Federated account (provided their organization's federated account authentication process meets NIH's two-factor authentication standards). Users can set up and use both Login.gov and InCommon Federated accounts that support NIH's two-factor authentication standards with an eRA user account.

Account Management Module (AMM)

The Account Management Module (AMM) facilitates user and system account administration based on assigned user roles, providing an organized way to search, create new, or manage existing user accounts from your organization.

It is only available to DOC external users with SO, AA, and AO roles. Once the institutional account is created, the SO can create additional user accounts with various levels of access and capability.

AMM user accounts can have the following statuses:

- Active — A valid account in good standing
- Deactivated — The account has been disabled by an administrator
- Locked due to inactivity — The account has been locked by the system due to no user activity for 120 days
- Pending Affiliation — The account has not yet been associated to an organization
- Profile Only — A profile that is not associated to a user account

After logging into Commons, SOs, AOs, and AAs can access AMM from the Commons welcome screen by clicking the **Account Management (Admin)** tile, or selecting **Admin** from the *Apps* menu, as shown here:
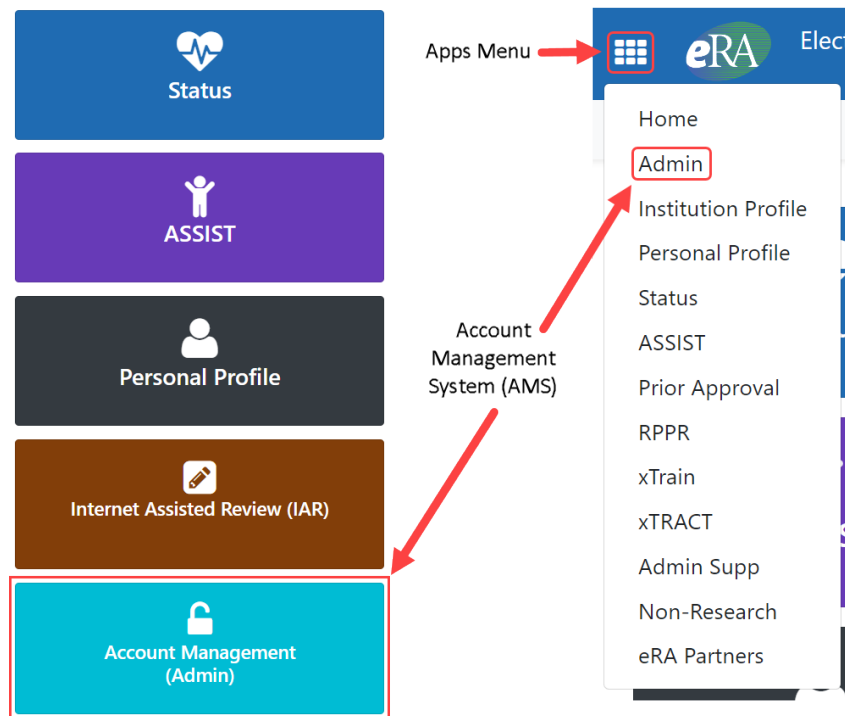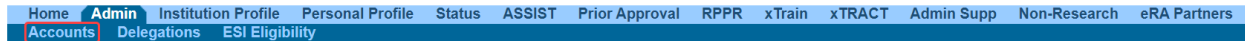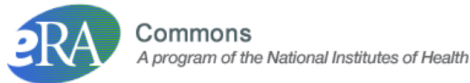

Figure 4: Accessing AMM from eRA Commons Welcome Screen Tiles and "Apps" Menu

Figure 5: AMM Landing Page with "Accounts" Tab Highlighted

Clicking on the "Accounts" tab will load the "Account Administration" screen. To access the user account search screen, click on the "Account Management" tab on this screen.

Figure 6: Account Administration Screen with "Account Management" Tab Highlighted

The "Search Results" screen is where the SO, AO, and AA can:

- Create a new account
  - Users must first search for an existing account prior to the "Create Account" button will become available, to prevent the creation of duplicate accounts
- Modify an existing account
  - Search for users within their organization to add and remove roles or update their contact information
  - Removing all roles from a user account in their organization will remove the user's affiliation and the account will change to "Pending Affiliation" status
  - Search for users that are not currently affiliated with their organization to create an affiliation by adding a role to the existing account (this can only be done on Scientific accounts)

Figure 7: AMM "Search Accounts" Screen

The AMM User Guide for eRA Commons Users is available here: https://www.era.nih.gov/files/AMM_User_Guide.pdf

Institution Profile (IPF)

The Institution Profile (IPF) is a central repository of information for all eRA Commons-registered organizations. The IPF includes institution name, address, names of administrative officials, as well as financial, assurance, and certification information.

Following the creation of an institutional account in eRA Commons, the IPF is populated with the organizational information from registration and assigned a unique IPF number, which uniquely identifies institutional information in eRA systems.

SOs are the only Commons users authorized to edit the IPF, ensuring critical contact information is secure. Contact information includes dedicated email addresses for awards, conflict of interest, closeout communications, and more. It provides one place to find important information related to the grant award process. Other users affiliated with the institution can view IPF information as a read-only page.

After logging into Commons, users affiliated to an organization can access the organization's IPF by clicking on the "Apps" menu icon and selecting "Institution Profile" in the dropdown menu, as shown below.
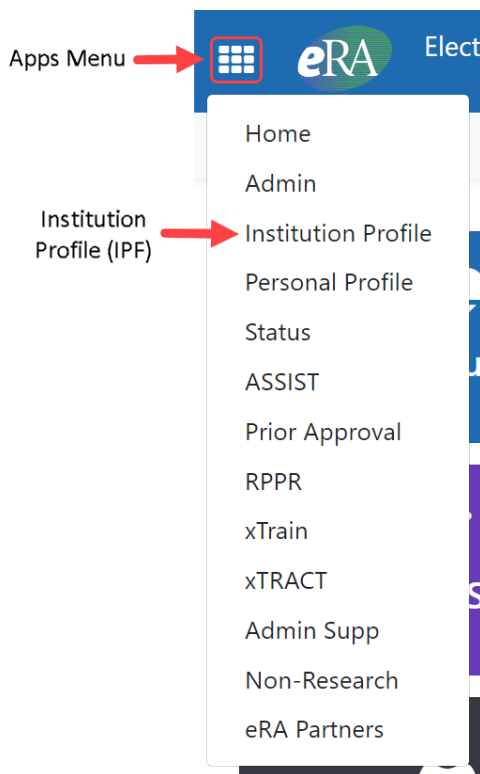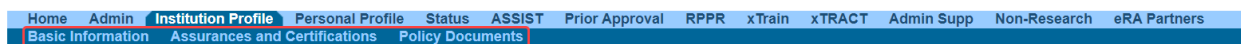
Figure 8: Accessing the Institution Profile (IPF) Module from the Commons Welcome Screen

The IPF is divided into three sections, "Basic Information," "Institutional Assurances and Certifications," and "Policy Documents."

Figure 9: IPF Landing Page with "Basic Information," "Assurances and Certifications," and "Policy Documents" Highlighted

"Basic Information" includes the institution name, physical address, contact information, a listing of the institution's SOs and technology transfer officers, and indirect cost negotiation information. "Institutional Assurances and Certifications" displays the status of the institution's Research and Integrity Certification, as well as the status of assurances for non-delinquency on federal debt, institutional disbarment and suspension, age discrimination, etc. "Policy Documents" is where the organization posts its financial conflict of interest policy.

Additionally, the organization's IPF number/code, which is needed when searching for grants pending progress reports or closeout on the Commons "Quick Searches" page and the expiration date of the System for Award Management (SAM.gov) registration are displayed on both the "Basic Information" and "Institutional Assurances and Certifications" screens.

Personal Profile (PPF)

The Personal Profile (PPF) module is the central repository of information for all eRA Commons registered users. It is designed so that individual Commons users maintain ownership of the accuracy of their own profile information. This profile information is then integrated throughout eRA's systems and used for a variety of agency business such as peer review, application data, etc.
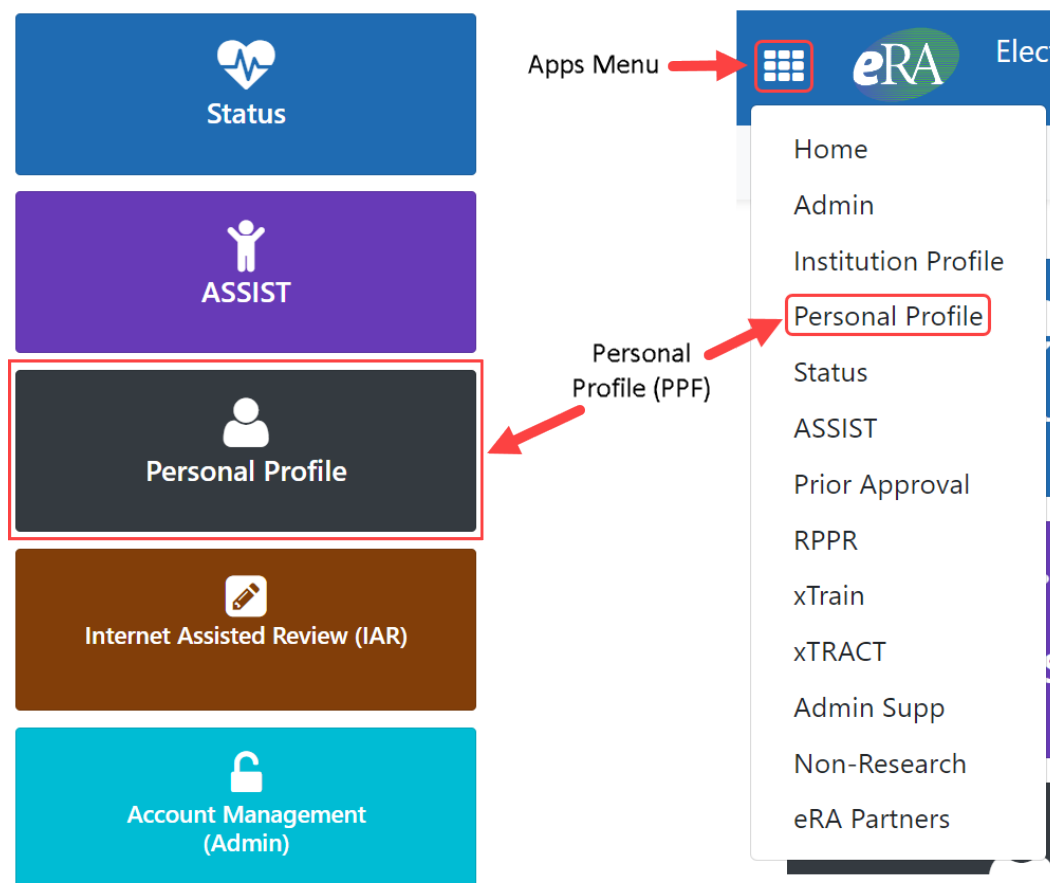

Figure 10: Accessing the Personal Profile (PPF) Module from the Commons Welcome Screen Tiles and "Apps" Menu

Users are responsible for keeping their information current and correct. This data must be kept up to date to ensure that grant applications are processed accurately and that reviewer conflicts may be identified. Additionally, users can create or connect their ORCID ID (Open Researcher and Contributor ID) to their eRA Commons account, so that their publications can be linked to their grants.

The personal profile is divided into sections that vary dependent upon the role(s) the user holds. They will include "Name and ID," "Demographics," and "Employment" for Administrative roles (SO, AO, AA, and FSR) and the Scientific role PD/PI also includes "Reviewer Information," "Trainee Information," "Education," "Reference Letters," and "Publications."

All sections must be completed and saved. If a required field in a section is left incomplete, you will not be able to save the profile.

electronic Research Administration | www.era.nih.gov | eRAinfo@mail.nih.gov

Additional Resources

More information is available at the links included below, including eRA Commons; logging in; accessing and using the Account Management, Institution Profile, and Personal Profile modules; and eRA Service Desk help and tutorials.

eRA Commons

Homepage: https://public.era.nih.gov/commonsplus

Overview: https://www.era.nih.gov/help-tutorials/era-commons/overview.htm

Online help: https://www.era.nih.gov/erahelp/Commons/default.htm

User guides: https://www.era.nih.gov/help-tutorials/era-commons/user-guide.htm

Features and updates: https://www.era.nih.gov/help-tutorials/era-commons/features-fixes.htm

FAQs: https://www.era.nih.gov/faqs.htm

Training: https://www.era.nih.gov/help-tutorials/era-commons/eRA-Training-eRA-Commons.htm

Logging In

Online help: https://www.era.nih.gov/erahelp/commons/Commons/access/login.htm

Institution Profile Module

Overview: https://www.era.nih.gov/help-tutorials/institutional-profile/overview.htm

Online help: https://www.era.nih.gov/erahelp/commons/default.htm#cshid=1046

Fact sheet: https://inside.era.nih.gov/ipf/fact-sheet.htm

User guide: https://inside.era.nih.gov/files/IPF_user_guide.pdf

Personal Profile

Overview: https://www.era.nih.gov/help-tutorials/personal-profile/overview.htm

Online help: https://www.era.nih.gov/erahelp/ppf/default.htm

User guide: https://www.era.nih.gov/files/personal_profile_userguide.pdf

FAQs: https://www.era.nih.gov/faqs.htm#VI

Account Management Module

Overview: https://www.era.nih.gov/help-tutorials/ams/overview.htm

Online help: https://www.era.nih.gov/erahelp/AMS_NEW/default.htm

Fact sheet: https://inside.era.nih.gov/ams/fact-sheet.htm

Guide for Commons external users: https://www.era.nih.gov/files/AMM_User_Guide.pdf

eRA Service Desk

Homepage: https://www.era.nih.gov/need-help

Hotline: 866-504-9552 (toll-free) or 301-402-7469

Service Desk help request ticketing system: https://public.era.nih.gov/submithelp/

eRA help and tutorials webpage: https://www.era.nih.gov/help-tutorials

eRA video tutorials: https://www.era.nih.gov/era-training/era-videos.htm

FAQs: https://www.era.nih.gov/faqs.htm