

## eRA Commons User Roles

### Signing Official (SO)

A Signing Official (SO) is a Business Official (BO) within an extramural organization. The SO has institutional authority to; legally bind the institution in grant-administration matters by providing signature approval on grant application submissions. The SO monitors grant related activities within the extramural organization and may have a number of titles.

A Signing Official (SO) role has the following privileges:

- Register the applicant institution in the eRA Commons
- Create and update the Institutional Profile (IPF)
- Create/delete/update all Commons accounts (except IAR and TRAINEE accounts)

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**NOTE:** The SO cannot modify a user's Personal Profile (PPF)

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- Create affiliation of an existing Principal Investigator (PI) and/or IAR Commons account
- Submit electronic grant application(s) on behalf of the institution via Grants.gov (outside of eRA Commons), if also registered with Grants.gov as Authorized Organization Representative (AOR)
- View status of all grant applications originating from their institution and any errors or warnings that may have been triggered
- View assembled image of submitted grant applications before they move on for further processing
- Reject grant applications to address warnings or to address the fact that some part of the application was lost or did not transfer correctly during the submission process due to a Grants.gov or Commons issue
- View award information for all grants awarded to the institution

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**NOTE:** The SO cannot view summary statement or priority score.

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- Submit Just-in-Time (JIT) information for a PI
- View the following Training-Grant-related items:
  - Trainee Roster
  - List of Grants
  - Grant Summary
  - Routing History
- PDF-formatted Appointments/Amendments/Terminations

- Delegate Electronic Streamlined Noncompeting Award Process (eSNAP) edit authority to another user on behalf of the PI
- Delegate submit authority for progress reports (eSNAP) to the Principal Investigator (PI)
- Submit an eSNAP to the Agency (NIH) on behalf of the institution
- Submit an eSNAP to the Agency (NIH) on behalf of the PI
- Submit Final Progress Report
- Apply for a No-Cost Extension on behalf of the PI

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**NOTE:** The SO role should not be combined with the PI role.

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### **Principal Investigator (PI)**

A Principal Investigator (PI) directs a research project or program supported by the NIH. The role of the PI within the eRA Commons portal is to complete the grant administration process or to delegate this responsibility to another individual. A PI may only access information pertaining to the grant(s) on which he/she is the designated PI.

NIH has adopted a Multiple-PI model — as directed by the Office of Science and Technology Policy — permitting more than one PI to be associated with an NIH-funded grant, contract, or cooperative agreement. Additional named PIs assist with the responsibilities currently accorded to a single PI. The multiple-PI model is intended to supplement — not replace — the traditional single-PI model.

A Principal Investigator (PI) role has the following privileges:

- Edit Personal Profile
- Delegate edit authority of own Personal Profile authority to others
- View status of all grant applications for which they are the designated Program Director/Principal Investigator (PD/PI), including any errors or warnings that may have been triggered
- View assembled image of submitted grant applications before they move on for further processing
- View Study Section/Meeting Roster of the Review Group that will be reviewing an application
- View Review outcome information and Summary Statements
- View Notice of Award (NOA) for all grants for which they are the designated PD/PI
- Delegate Authority (eSNAP, xTrain, and check grant status) to the Assistant (ASST) so that they can perform same actions and receive same notifications as a PI

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**NOTE:** They cannot delegate authority to submit appointments to the Agency.

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- View the following Training-Grant-related items using xTrain:
  - Trainee Roster
  - List of Grants

- Grant Summary
- Routing History
- PDF-formatted Appointments/Amendments/Terminations
- Initiate, update, route, and submit Appointments, Re-Appointments, and Amendments in xTrain
- Initiate, update, and route Termination Notices in xTrain
- Initiate an eSNAP report
- Delegate eSNAP edit authority
- Submit eSNAP (if given the authority by SO)
- Delegate Status authority to others within the institution so that they can see PI-grant information (except Review outcome information and Summary Statement)

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**NOTE:** The PI role should not be combined with the SO role but can be combined with the IAR role.

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### **Administrative Official (AO)**

An Administrative Official (AO) is a Business Official (BO) within an extramural organization and may be located within the Central Research Administration Office and/or an academic department. The AO reviews grant applications for accuracy before the SO submits final applications to the NIH. Depending on an institution's workflow process, it is possible for the SO and AO to be the same person. In this case, only SO authority is necessary (as SO authority supersedes AO authority). SO and AO authorities should not be combined.

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**NOTE:** The AO is not authorized to transmit applications to the NIH.

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An Administrative Official (AO) role has the following privileges:

- Create all accounts (except IAR, TRAINEE, and BO)
- Update Commons accounts created by the AO
- View status and award information for all institution grants

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**NOTE:** The AO cannot view summary statement or priority score.

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- Create affiliation of an existing PI or IAR Commons account and the institution

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**NOTE:** The AO cannot modify the Institution Profile.

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### **Account Administrator (AA)**

Designated by the SO, the Accounts Administrator (AA) facilitates the administration of eRA Commons accounts. The AA typically is located in the Central Research Administration Office at the grantee organization.

An Accounts Administrator (AA) role has the following privileges:

- Create and modify all Commons accounts except SO, FCOI, IAR, and Trainee accounts
- Create affiliation of an existing PI Commons account

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**NOTE:** AAs are not authorized to modify Institutional Profile (IPF) information or user's Personal Profile information.

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### **Assistant (ASST)**

The Assistant (ASST) is delegated access by a PI to his/her account to assist with data entry and completion of eSNAP. An Assistant (ASST) role has the following privileges:

- Edit own Personal Profile data
- Edit PIs Personal Profile if delegated by PI
- Edit PIs eSNAP data if delegated by PI
- Edit PIs Administrative Supplement requests initiated in the eRA Commons
- View PI Grant Status if delegated by PI
- Perform PI xTrain functions (except submit to agency) if delegated by PI

### **Internet Assisted Reviewer (IAR)**

Specially selected by Scientific Review Officers (SRO) of the NIH, an Internet Assisted Reviewer (IAR) can critique and score submitted grant applications. Many PIs are selected for this role and IAR authority is automatically added to their account once an SRO enables them for a meeting. All other reviewers who have never served as PIs have IAR authority solely.

An Internet Assisted Review (IAR) role has the following privileges:

- Edit own Personal Profile and Reviewer address data
- Use Internet Assisted Review (IAR) to submit critiques and preliminary scores for applications to be reviewed at a meeting for which they are enabled
- If affiliated with an institution, the reviewer can take advantage of other Commons features such as Status

### **Financial Status Reporter (FSR)**

The Financial Status Reporter (FSR) is responsible for the reporting a statement of expenditures for a grant. Depending on the institution workflow process, it is possible for the SO and FSR to be the same person (these two authorities may be combined). If the FSR is a different individual, a separate FSR account must be created.

A Financial Status Report (FSR) role has the following privileges:

- Submit Financial Status Reports on behalf of the institution.

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**NOTE:** An account with only the FSR role assigned can only perform FSR tasks. An account can include multiple roles, including that of FSR.

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## **Business Official (BO)**

The Business Official (BO) role is used with xTrain; which is a service to electronically manage appointments for awarded Training Grants.

A Business Official (BO) role has the following privileges:

- View the following Training-Grant-related items:
  - Trainee Roster
  - List of Grants
  - Grant Summary
  - Routing History
  - PDF-formatted Appointments/Amendments/Terminations
- Initiate, update, route, and submit Termination Notices (only for user authorized to submit TNs)

## **Post Doctoral Role**

The Post-Doctoral (Post-Doc) role is part of the Manage Accounts dropdown list of roles that can have affiliations with multiple institutions. The Commons Electronic Trainee Activities Interface (X-Train) provides the means for NIH supported Post Doctoral students and trainees to provide NIH with the information needed to administer their Ruth L. Kirschstein [National Research Service Awards](#) (Kirschstein-NRSA) training grants. Required information includes:

- Address
- Educational background
- NIH monetary support

The Training Activities (TA) module is used at the NIH to support business operations for processing training appointments, terminations, and payback obligations of NRSA trainees and terminations and payback obligations of Kirschstein-NRSA individual fellows. A signed hard copy of the Payback Service Agreement is required for first-time postdoctoral trainees appointed to a Kirschstein-NRSA research-training grant.

NIH awards these training grants every year to help individuals train for research careers in the behavioral, biomedical and clinical sciences. Under current legislation, postdoctoral recipients of Kirschstein-NRSA support must pay back the first 12 months of support either by time-in-service or through monetary remuneration. Additional information on the Kirschstein-NRSA can be found at <http://grants.nih.gov/training/nrsa.htm>

- The Post-Doc role has no rights to view or change anything within Commons

- A Post-Doc role is used for tracking purposes only

### **Financial Conflict of Interest Role (FCOI)**

- The FCOI can initiate, edit, submit, view and delete records and documents.
- Can only be assigned by the SO to someone within his or her institution and that person must have a Commons account.

### ***Financial Conflict of Interest Assistant Role (FCOI ASST)***

The FCOI Assistant (ASST) is delegated access by the FCOI role to assist with data entry and completion of FCOI reports.

### ***Financial Conflict of Interest View Only Role (FCOI View Only)***

- A person with FCOI View-Only authority can view FCOI information entered by the institution in the FCOI module.

### **Trainee Role**

Use the Commons xTrain Trainee role to; electronically manage appointments for awarded Training Grants.

A Trainee role has the following privileges:

- View his/her own PDF-formatted Appointments/Amendments/Terminations and their routing history
- Update and route his/her own Appointments/Amendments/Terminations