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Powering the Advancement of Science

Account Management User Guide

System Version 1.0.0.0

Document Version 1.0.0.0

October 7, 2011

CONTACT US

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For general questions about this module and associated business processes:
Please contact your IC Coordinator. A list of IC Coordinators is available online: http://inside.era.nih.gov/techrep_list.cfm.

Troubleshooting support:
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DOCUMENT HISTORY

Date	System Version	Document Version	Description of Change	Author
10/07/2011	1.0.0.0	1.0.0.0	Develop initial draft of document	eRA Documentation Team

How are we doing? The User Support Branch (USB) of electronic Research Administration (eRA) is dedicated to serving our community and welcomes your feedback to assist us in improving our user guides. Simply click the hyperlink listed below and complete the questionnaire associated with the user guide.

http://era.nih.gov/era_feedback/feedback.cfm?userguide=ams

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

1 Introduction

This document contains an overview of the Account Management functionality.

2 Purpose

The purpose of this document is to show users how to use Account Management.

3 Scope

The document covers all the Account Management functionality in this initial release of the application.

4 Overview

Account Management replaces the eRA Commons Admin module. Account Management facilitates user account administration based on assigned user roles. Once the institutional account is created, the Signing Official (SO) at each grantee organization is able to establish additional user accounts with various levels of access and capability. The SO or Accounts Administrator (AA) may then create additional accounts for the administrative and scientific staff.

The preconditions are as follows:

1. The system shall allow authorized users to access the application. Standard authentication policy and rules are followed.

2. The user has a valid Commons' Username and password.

Application Features

1. The system shall provide the ability to search existing Commons' account(s). When a search is performed, all records that meet the search criteria are returned on the *Search Accounts* screen. Details of account are viewed by selecting the **View** hyperlink in the *Search Results* section.

2. The system shall provide the ability to edit an existing Commons' account(s) based on the access privileges available to user.

3. The system shall provide the ability to create new Commons' user account(s) with an associated password. The Username and password must comply with Standard eRA policy guidelines. All temporary passwords are system generated.

4. The system shall provide the ability to affiliate/un-affiliate a Commons' user account to/from an institution.

5. The system shall provide the ability to edit a Commons' user account.

6. The system shall provide the ability to manage role(s) on the Commons' user account.

7. The system shall provide the ability to reset passwords on existing accounts. All passwords are system generated.

8. The system shall provide the ability to lock and unlock Commons' user accounts.

9. The system shall provide the ability to remove all affiliations from a Commons' user account.

This application is available to only those users that have access privileges to manage Commons accounts. Only users with following roles have access:

- Account Administrator (AA)

   o This role gives the user the ability to search accounts, create accounts, modify/manage accounts and grant/revoke roles.

- Administrative Official (AO)

- o This role gives the user the ability to search accounts, create accounts, modify/manage accounts and grant/revoke roles.

- Business Official (BO)

    - o This role gives the user the ability to search accounts, create accounts, modify/manage accounts and grant/revoke roles.

- Signing Official (SO)

    - o This role gives the user the ability to search accounts, create accounts, modify/manage accounts, and grant/revoke roles.

For additional account role information, please see the eRA Commons Roles (http://era.nih.gov/files/eRA_Commons_Roles.pdf) page to view the types of accounts that can be created and their levels of access.

5 Accessing Account Management

The Account Management is accessed from the **Admin → Accounts → Manage Accounts** tab in the Commons System.

When Account Management is accessed, the default screen is the *Search Account* screen under the **Manage Accounts** tab.

Figure 1: Search Accounts Screen

6 Search/View Account

Account Management provides the ability to search for existing users' account(s). When a search is performed, all records that meet the search criteria are returned in the *Search Results* section on the *Search Accounts* screen.

Depending on the user's roles and privileges, the following options appear on the *Search Accounts* screen:

- View NIH Support

- View Account

- Modify Account

- Create Affiliation

- Un-affiliate an Account

- Create Account

- Resend eMail

The following roles can access the Search Account feature.

- Signing Official (SO)

- Account Administrator (AA)

- Account Official (AO)

- Business Official (BO)

The following search parameters can be entered, selected or checked to search for an account(s):

- **Role:** List of roles that can be searched on

- **User ID:** User login identification name

- **First Name**

- **Middle Name**

- **Last Name**

- **Account Status:** Shows all profiles that have submitted an application with the Institutional Profile File (IPF) of the querying individual; Values are: *Active, Pending, Not Affiliated*

- **Search outside your Institution:** Searches outside the user's Institution

NOTE: The **Continuous Submission (CS) Eligible Only** checkbox is on the *Advanced Search* screen.

If a search is preformed without selecting any roles for Institution Administrative (AO and AA) users, the system searches on all authorized (based on privileges) roles including accounts with no roles.

Last Name requires a minimum of two characters and **First Name** requires a minimum of three characters. Upper or lower case may be used. A wild card character (%) may be used to search for string patterns in the **User ID**, **First Name**, **Middle Name**, **Last Name** fields.

If the **Account Status** of *Not Affiliated* is selected, then **Search outside your Institution** box must be checked.

1. To search for an account, complete the appropriate fields on the *Search Account* screen.

2. To search outside an institution, select the **Search outside your Institution** checkbox.

3. Click the **Search** button to initiate the search or click the **Clear** button to clear the search criteria and start a new search.

Figure 2: Search Accounts Screen

If the **Search** button is clicked, the system displays the appropriate accounts in the **Search Results** located at the bottom of the *Search Account* screen. The default sort order for the search results is the **User ID** in alphabetical descending order. Fifty search result records per page are displayed. If there are more than fifty search result records, then pagination buttons: **First/Prev**, **page numbers** and **Next/Last**, are displayed.

The following fields are in the **S**earch **Results** section on the **S**earch Accounts screen.

- **User ID**

- **User Name**

- **Email Address**

- **Account Status**

- **Roles/Affiliation**

- **Action** – Options are: **View, Edit, Create Affiliation, Unaffiliate, Create Account, Resend Email**

NOTE: The **Resend Email** option only appears if the user's account is in a pending status.

Figure 3: Search Accounts Screen Displaying Search Results

6.1 Action Options

1. Perform one of the following options in the **Action** column:

   a. To view NIH Support, click the appropriate account's **User ID** hyperlink. Refer to *Section 7 – Create Trusted or Un-trusted Account* for more information.

   b. To view an account, click the **View** hyperlink in the *Search Results* section for the appropriate account.

   c. To modify an account, click the **Edit** hyperlink in the *Search Results* section for the appropriate account. Refer to *Section 8 – Modify Account* for more information.

   d. To create an account for a user profile in the system without a User Name, click the **Create Account** hyperlink in the **Action** column for the appropriate person. Refer to *Section 7 – Create Trusted or Un-trusted Account* for more information.

   e. To create a new account for a user, click the **Create Account** button located in the lower left corner of the screen. Refer to *Section 7 – Create Trusted or Un-trusted Account* for more information.

NOTE: The **Create Account** button is displayed, but disabled until a search is performed and the search results are displayed.

   f. To create an account affiliation, click the **Create Affiliation** hyperlink for the appropriate account. Refer to *Section 8.6 – Create Affiliation* for more information.

   g. To un-affiliate an account, click the **Unaffiliate** hyperlink for the appropriate account. Refer to *Section 8.7 – Unaffiliate Account* for more information.

   h. To resend an email if present, click the **Resend Email** hyperlink for the appropriate account. Accounts that are pending user review indicate that the user has not validated the account request. Refer to *Section 9 – eMail Notifications – Create Account Notification for Existing Profiles* for more information.

If the **View** hyperlink is clicked, the system displays the *View Account* screen. The following non-editable fields are on the *View Account* screen:

- **User Type** – (Values: *Commons, NIH, Agency (non-NIH), Federated)*
- **User ID** – Login ID
- **Organization**
- **First Name**
- **Middle Name**
- **Last Name**
- **E-mail Address**
- **Role**

- **Organization**

Figure 4: View Account Screen

2. To return from the *View Account* screen to the *Search Accounts* screen, click the **Cancel** button located in the lower left corner.

7 Create Trusted or Un-trusted Account

The Commons system associates user accounts with an eRA profile record within the NIH database. For new users that do not have an existing profile record, a profile record is created. New accounts created with the PD/PI authority role involve unique identification of the PD/PI within the NIH database.

Account Management provides the ability to create a new trusted or un-trusted account(s) or an account for an existing account. The *Create Account* screen can be accessed from *Search Accounts* screen by clicking the **Create Account** button.

The following roles can create accounts:

- Signing Official (SO)
- Account Administrator (AA)
- Administrative Official (AO)
- Business Official (BO)

The following fields appear on the *Create Account* screen.

- **User Type -** (Values: *Commons, NIH, Agency (non-NIH), Federated)*
- **Organization**
- **First Name**
- **Middle Name**
- **Last Name**
- **User Name**
- **E-mail**
- **Re-Enter E-mail**
- **Role**
- **Institution/Organization**

7.1 Create Trusted Account

7.1.1 Create New Account

A trusted account is where the organization is a registered institution or where the organization is NIH or an Agency.

1. Perform one of the following:

    a. To create a new account, click the **Create New Account** button on the *Search Accounts* screen.

NOTE: To create an account for a user with an existing profile, refer to *Section 7.1.3 – Create A Account for Existing Profile*.

Figure 5: Search Accounts Screen Displaying Create Account Button

The system displays the *Create a New Account* screen. Depending on user's privileges creating the account, the following **User Type** appears on the *Create New Account* screen:

- For users that can only create Agency accounts, they can only select NIH and Agency (non-NIH) user types.

- For users that can only create Institution accounts, they can only select Federated user types.

- For users with NIH and Agency (non-NIH) user type, they can only select ICs as the organization.

- For users with a Non-Federated user type, they can select only external organizations as the organization.

- Commons' roles are pre-populated with *Commons* as the user type.

Depending on the user logged in, one of the following user types appears:

- Agency Accounts
    - o NIH – all NIH accounts
    - o Agency – all non-NIH (i.e. Veteran's Administration (VA))
    - o Federated – all external users that belong to Institutes that participate in federation
- Institution Accounts
    - o Commons – All extramural accounts

If logged in as an external user, then the following occurs:

- The default **User Type:** value is Commons.
- The **Organization** field is pre-populated based on the account logged in and is non-editable.

Figure 6: Create Account Screen

NOTE: All fields followed by an asterisk (*) are required.

2. If appropriate, select the appropriate **User Type:** from the drop-down menu.

3. Enter new account information, noting that the **User Name** must have a minimum of six (6) characters (numbers and letters can be combined). User names may not exceed the maximum of twenty (20) characters. Avoid using special characters or spaces in the Username.

NOTE: If the **User Type:** is Commons, then the **User ID** field is validated against existing Commons user names (IDs). If the **User Type:** is not Commons, then there is no authentication.

Figure 7: Create Account Screen Displaying Magnifying Glass Icon for Add Role

NOTE: Institution administrators (AO and AA) cannot create an account with no roles.

4. To add the appropriate role, click the **magnifying glass** icon in the **Role** column.

The system presents roles that can be granted by the user to the account being managed.
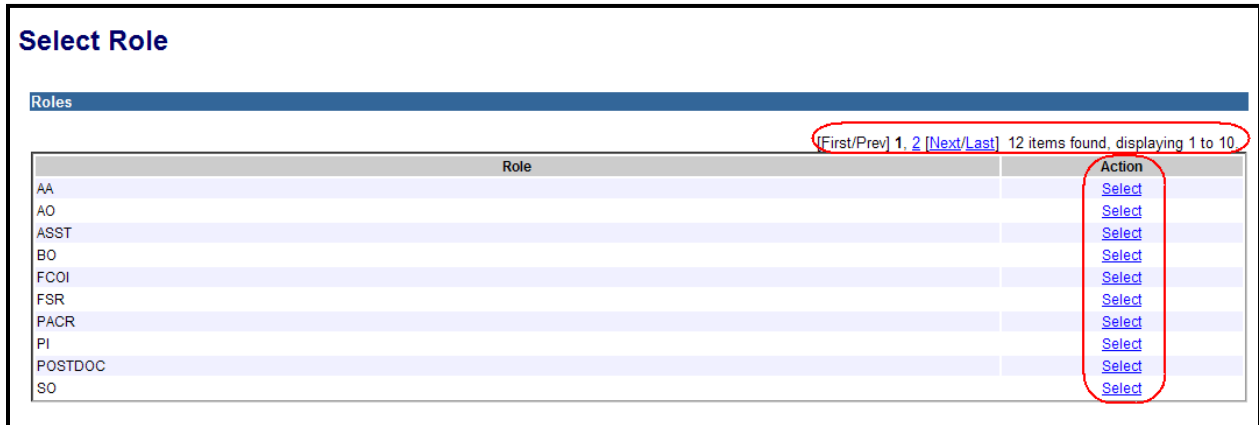
Figure 8: Select Role Screen

5. Select the appropriate role and click the **OK** button.

The system adds the role to the user's account being managed. The system defaults to the logged in user's Institution/Organization.
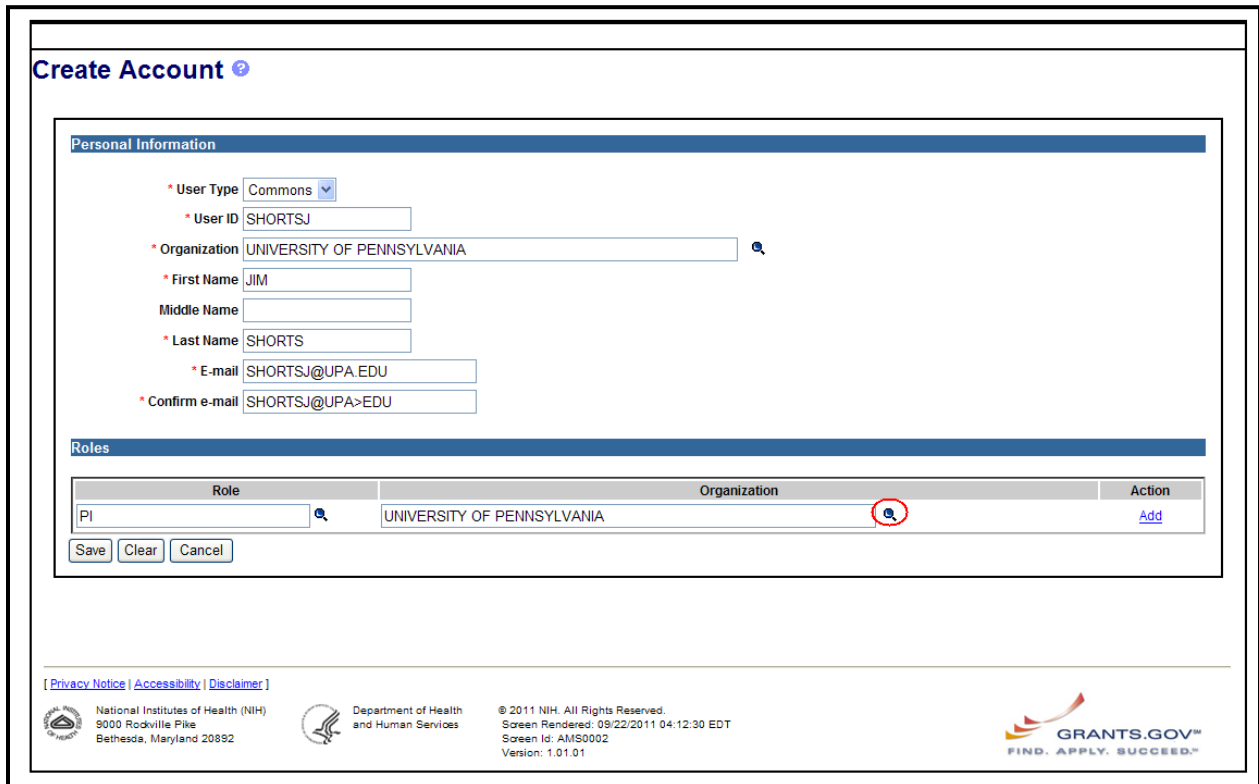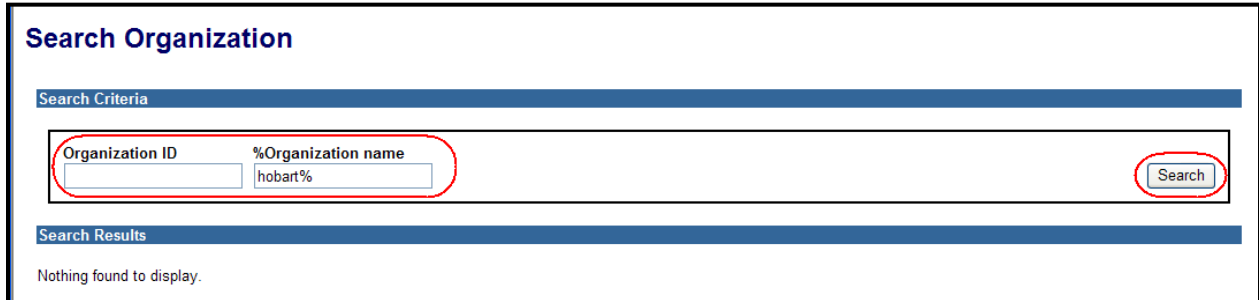

Figure 9: Create Account Screen Displaying Magnifying Glass for Organization

6. To add the **Institution/Organization**, if appropriate, click the **magnifying glass** icon in the **Institution/Organization** column.

NOTE: If the PI or TRAINEE roles are added, the system automatically adds the SO's Institution in the **Institution/Organization** column.

The system displays the *Search Organization* screen.
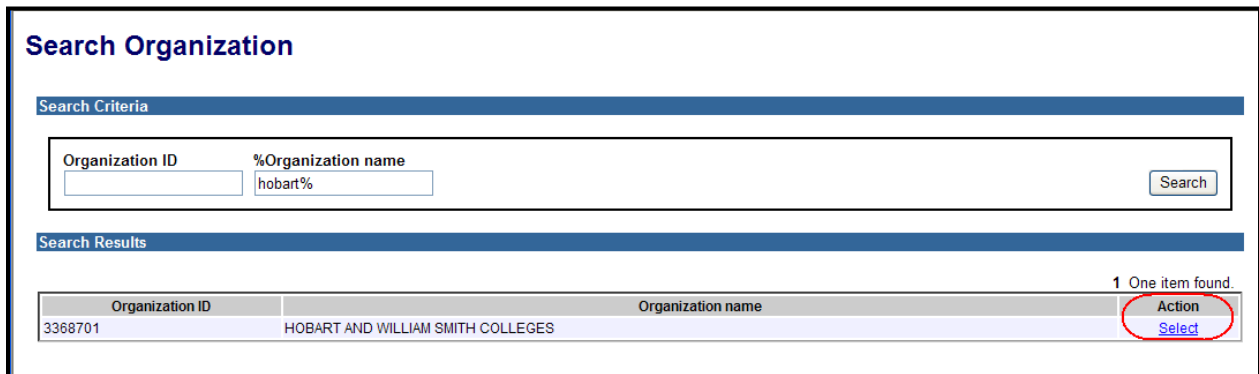
Figure 10: Search Organization Screen

7. Type in the **Organization ID** or the **Organization name**.

   a. Part of or the entire **Organization name** may be typed in.

   b. The percent sign (%) may be used as a wild card character.

8. Click the **Search** button.

The system displays the search results.

Figure 11: Search Organization Screen Displaying Select Option

9. Click the **Select** hyperlink to select the appropriate **Organization name**.

The system adds the Institution/Organization to the user's account being managed.

Figure 12: Create Account Screen Displaying Added Role/Organization

10. To add another **Role**, click the **Add** hyperlink.

The system adds a row with blank **Role** and **Organization** boxes.

    a. Repeat steps 4 through 9.

11. Complete one of the following:

    a. Click the **Add** hyperlink to add a blank **Role** row. Then click the **Save** button to complete the account creation.

NOTE: The role is not added until **Magnifying Glass** icons are gone. Therefore the **Add** hyperlink is clicked before completing a **Save**.

    b. Click the **Clear** button to clear the fields and create a new account.

    c. Click the **Cancel** button to exit the screen and return to the *Search Accounts* screen.

If the **Save** button is clicked, then the system performs validation checks. Refer to *Section 10 – Error Messages* for more information. If there are no validation errors, the system displays a *Create Account Confirmation* Screen.
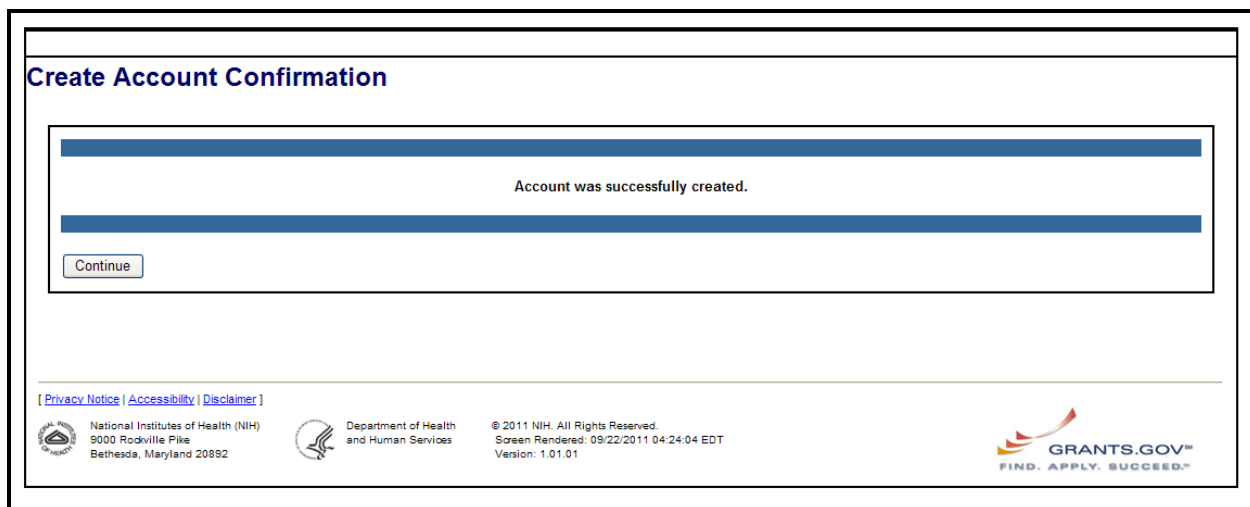
Figure 13: Create Account Confirmation Screen

    12. Click the **Continue** button to complete creating the account.

If there are no validation errors, the system performs the following:

- Creates the authentication credentials and generates a temporary password.

- Determines the new user account's permissions to create accounts in only one Agency or Institution and sets that as the Institution/Organization

- Creates the profile for the account and sets the Account Status to *Active*

- Associates the account with the profile

- Sends an email notification to the user whose account was created. Refer to *Section 9 – eMail Notifications – Create Account Notification for new Profiles and Password Notification for New Account* for more information.

- The system navigates to the *Search Accounts* screen.

7.1.2 Create Account with Existing Authentication Credentials

Creating an account for a user with existing authentication credentials is not applicable for Commons.

1. To create an account that has existing authentication credentials, complete the steps in *Section 7.1.1 – Create New Account* with the following exceptions:

    a. For **User ID**, provide the existing Username.

When the **Save** button is clicked, the system validates the existing credentials. If the system determines that the existing credentials are not associated with an eRA account, an error message is generated. Refer to *Section 10 – Error Messages* for more information.

7.1.3 Create Account for Existing Profile

An Administrator can only create an account for an existing profile for the following roles: PI, TRAINEE, POSTDOC, and SPONSER. No other roles appear in the **Role** list on the *Role List* screen.

1. To create an account for an existing profile, click the **Create Account** hyperlink on the *Search Account* screen. Refer to *Section 7.1.1 – Create New Account* for more information.

Figure 14: Search Accounts Screen Showing Account Created

The system sends an email notification with a **Verify Prior NIH Support** hyperlink to the user of the new account. Refer to *Section 9 – eMail Notifications – Create Account Notification for Existing Profiles* for more information.

7.1.4 Create Administrative Account from New Institution Registration

This process started when an Institution Registration request is submitted to NIH. Part of the request is the creation of the SO and the AA accounts from the information provided on the Registration Form.

The system creates SO and AA accounts after SO confirms the registration using the link provided in the Registration Approved email notification. The process happens behind the scene.

If there are no validation errors, the system performs the following:

- Creates the authentication credentials for SO and AA accounts and generates temporary passwords

- Creates the profile for the account and sets the Account Status to *Active*

- Associates the account with the profile

- Sends an email notification to the user whose account was created. Refer to *Section 9 – eMail Notifications – Create Account Notification for new Profiles and Password Notification for New Account* for more information.

- Sends an email notification to the user if the accounts' creation process fails. Refer to *Section 9 – eMail Notifications* for more information.

7.2 Create Un-trusted Account

An un-trusted account is where a user is invited via an email to register in Commons to become either a Trainee or an Internet Assisted Review (IAR) reviewer.

The following scenarios generate an email request:

1. The Scientific Review Officer (SRO) invites a reviewer to register in Commons. The system checks the status of the reviewer and sends an email (refer to *Section 9 – eMail Notifications*) for one of the following conditions:

   a. Reviewer's Commons account exists - IAR Reviewer with Commons Account Invitation email

   b. Reviewer does not have a Commons account – IAR New Reviewer Invitation email

   c. Reviewer in *Pending Reviewer* status – IAR Reviewer in Pending Reviewer Status email

2. A PI invites a trainee to register in Commons. If the trainee is in a Pending Trainee status, the system sends an email notification. Refer to *Section 9 – eMail Notifications – Pending Trainee Status Email* for more information.

7.2.1 Account Request Previously Initiated

The following occurs depending on the stage that the account request was in when the processing was canceled:

1. If the **Continue** button was not clicked on the *Create A New Account* screen, then the system returns to the *Create A New Account* screen. Refer to *Section 7.2.2 - Create Account*.

2. If the **Continue** button was clicked on the *Create A New Account* screen, then the system saved the accounts information and now navigates to the *Verify NIH Support* screen. Refer to *Section 7.2.3 - Verify NIH Support*.

3. The account is in a Pending NIH status, the system produces an error. Refer to *Section 10 - Error Messages* for more information.

7.2.2 Create Account for IAR Reviewers and Trainees

For IAR Reviewers and Trainees, complete the following steps to create an account:

1. Click the **Create Account Link** in the email received.

The system displays the *Create a New Account* screen. The following fields appear on the *Create a New Account* screen.

- **User Name**
- **Password**
- **Re-type Password**
- **Phone**
- **E-mail**
- **First Name**
- **Middle Name**
- **Last Name**
- **Organization**
- **Birth Date**
- **SSN**

Figure 15: Create a New Account for Reviewer or Trainee

2. Complete the required fields.

NOTE: All fields followed by an asterisk (*) are required. The system generates a temporary password.

3. Perform one of the following:

   a. Click the **Save** button to save the new account.

   b. Click the **Reset** button to clear the fields and start again.

   c. Click the **Cancel** button to exit the screen.

If the **Reset** button is clicked, the system clears all information entered except for the **User Name**, **Password** and **Re-type Password** fields.

If the **Cancel** button is clicked, the system navigates to the Commons *Login* screen. If the request account registration was not complete, the system sends an email notification to user. Refer to *Section 9 – eMail Notifications – Trainee in Pending Trainee Status or IAR Reviewer Pending Reviewer Status)* for more information.

If the **Save** button is clicked, then the system performs validations. Refer to *Section 10 – Error Messages* for more information. If there are no validation errors, the system sets the account status for reviewers to *Pending Reviewer* and saves the account information.

After clicking the **Continue** button, the system performs a profile and role matching and presents the *Verify NIH Support* screen. If the system did not find any matching profiles and roles, then the system displays on the *Verify NIH Support* screen the following informational message: *We do not show any awarded NIH Support or Committee Involvement for <Last Name>. This may*

be appropriate. Either select: Add Additional NIH Support, Reject Account Request, or Complete Account Request to continue. Refer to *Section 7.2.3 Verify NIH Support* for how to proceed.

7.2.3 Verify NIH Support

Figure 16: Verify NIH Support Screen for new Reviewer or Trainee

Figure 17: Verify NIH Support Screen for Reviews/Trainees with Previous Experience

1. On the *Verify NIH Support* screen, perform one of the following:

   a. Fill in the **Comments for NIH** text box if desired.

   b. If appropriate, confirm the information by selecting the **Correct**, **Incorrect** or **Nothing** radio buttons in the **Principal Investigator**, **Committee Involvement** or **Training** sections on the screen.

   c. Click the **Continue Account Request** button to continue the account creation.

   d. Click the **Reject Account Request** button to reject the request.

   e. Click **Add NIH Support** button to add the NIH Support.

7.2.3.1 Continue Account Request

If the **Continue Account Request** button is clicked, the system saves the information entered and displays the *Complete Account Request* screen. The following sections appear depending on the user account being created:

- **Principal Investigator**
- **Committee Involvement**
- **Training**

Figure 18: Complete Account Request Screen

1. Perform one of the following options:
    a. Click the **Complete Account Request** button to complete the account registration.
    b. Click the **Back** button to return to the *Verify NIH Support* screen.

If the **Complete Account Request** button is clicked, the system sets the status to *Pending NIH* and displays the *Finished Account Request* screen. The system sets the profile status to PROV (Provisional) and moves the account request to the Update Profile Status and Process Registrations (UPSPR) queue.

Figure 19: Finished Account Request Screen for Reviewer Account

Figure 20: Finished Account Request for Trainee Account

7.2.3.2 Reject Account Request

If the **Reject Account Request** button is clicked, the system navigates to the *Reject Account Request* screen.

Figure 21: Reject Account Request Screen

1. On the *Reject Account Request* screen, perform one of the following:

    a. Complete the **Comments** (required) text box and click the **Reject Account Request** button to complete rejecting the account.

    b. Click the **Back** button to return to the *Verify NIH Support* screen.

If the **Reject Account Request** button is clicked, the system sets the account status to blank. The system sends an email notification to the initiator of the account request. Refer to *Section 9 – eMail Notifications – Reject Account Request* for more information. The system navigates to the Commons *Login* screen.

7.2.3.3 Add NIH Support

If the **Add NIH Support** button is clicked on the *Verify NIH Support* screen, the system displays the *Add NIH Support Search* screen. The following fields appear on the *Add NIH Support Search* screen in the **Search** section:

- **Type**
- **Activity**
- **IC**
- **Serial Number**
- **Support Year**
- **Suffix**

The following fields appear in the **Search Result** section:

- **Grant Number**
- **PI Name,**

- **Project Title**
- **Action**

Figure 22: Add NIH Support Screen

1. On the *Add NIH Support Search* screen, enter the grant information.

NOTE: All fields followed by an asterisk (*) are required. **IC** and **Serial Number** are required.

      a. Click the **Search** button to initiate the search or click the **Back** button to return to the *Verify NIH Support* screen.

If the **Search** button is clicked, the system displays the appropriate grants in the **Search Result** section.

Figure 23: Add NIH Support Screen Displaying Search Results

      b. After clicking the **Search** button, click the **Add Grant** hyperlink in the **Action** column for the appropriate grants to be reviewed or to be a trainee on.

If the **Add Grant** hyperlink is clicked on the *Add NIH Support Search* screen, the system verifies that there are no pending account requests or accounts associated with the profile for the

grant(s) selected. The system adds all grants associated with the selected PI profile. The system displays the *Complete Account Request* screen.
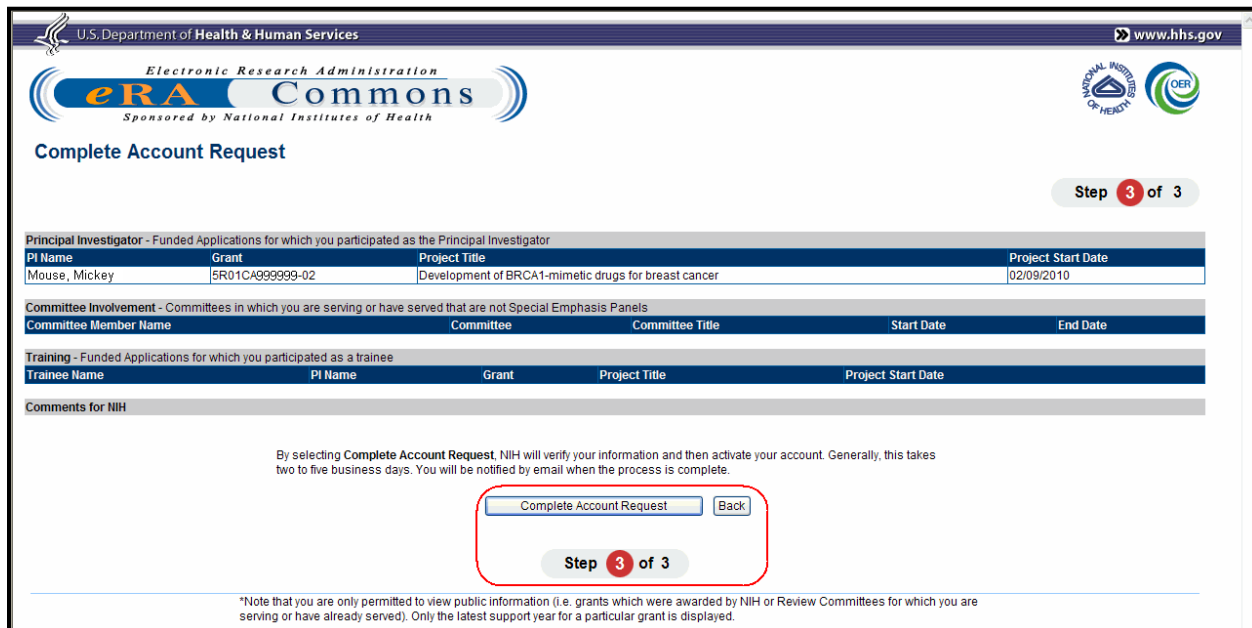
Figure 24: Complete Account Request Screen

2. Perform one of the following options:

   a. Click the **Complete Account Request** button to complete adding the NIH Support.

   b. Click the **Back** button to return to the *Add NIH Support* screen.

If the **Complete Account Request** button is clicked, the system sets the status to *Pending NIH* and displays the *Finished Account Request* screen. The system sets the profile status to PROV (Provisional) and moves the account request to the Update Profile Status and Process Registrations (UPSPR) queue.

Figure 25: Finished Account Request Screen for Reviewer Account

Figure 26: Finished Account Request for Trainee Account

8 Modify Account

Account Management provides the ability to edit/manage existing users' account(s). The *Modify Account* screen can be accessed from *Search Accounts* screen by clicking the **Edit** hyperlink in the **Action** column for the appropriate user.

The following roles can access the Modify Account feature.

- Signing Official (SO)

- Account Administrator (AA)

- Account Official (AO)

- Business Official (BO)

The following options appear on the *Modify Account* screen.

- Ability to Edit Personal Information

- Add/Delete Role(s)

- Lock/Un-lock Account(s)

- Reset Password

The following fields appear on the *Modify Account* screen:

- **User Type** – (Values: Commons, NIH, Agency (non-NIH), Federated)

- **User ID**

- **Organization**

- **First Name**

- **Middle Name**

- **Last Name**

- **E-mail**

- **Confirm e-mail**

- **Role**

- **Organizations**

- **Action**

- **Reset Password**

- **Account Lock Status**

8.1 Edit Personal Information

Figure 27: Modify Account Screen

1. To edit the personal information, complete the appropriate changes to the non-gray fields in the *Personal Information* section on the *Modify Account* screen.

2. Perform one of the following:

    a. Click the **Save** button to save the changes.

    b. Click the **Clear** button to clear the changes and start again.

    c. Click the **Cancel** button to exit and return to the *Search Accounts* screen.

If the **Save** button is clicked, the system performs validation checks, modifies the account with no validation errors, updates the associated personal information (profile) and displays the modified account information. The following informational message is displayed: *The account <USER ID> has been successfully updated (ID: 200533).* An email notification is only sent to the user whose account is modified. Refer to *Section 9 – eMail Notifications – Modify Account eMail* for more information.

8.2 Add User Roles

Account Management provides the ability to add user roles.

Business Rules:

1. Roles that are available for selection are restricted by the user type.

    a. External user types only allow roles that have Institution context.

b. Internal user types only allow roles that have agency context.

2. The SO may edit all users with all roles.

3. The AA may edit all users with all roles except for the Financial Conflict of Interest (FCOI) role.

4. Users with the Administrative roles (AO and AA) cannot assign multiple affiliations to one user.

5. User that is granting the role does not have to search for the Institution/Organization because it is pre-populated with the granting user's Institution/Organization.

6. When affiliating a user with more than one Institution, the list of roles available is: IAR, PI, TRAINEE, POSTDOC, and SPONSER.

7. Duplicate roles may not be created, but multiple roles may be created or revoked at the same time.

Figure 28: Modify Account Screen

1. To add a role, click the **magnifying glass** icon in the **Role** column.

The system presents roles that can be granted by the user to the account being managed.
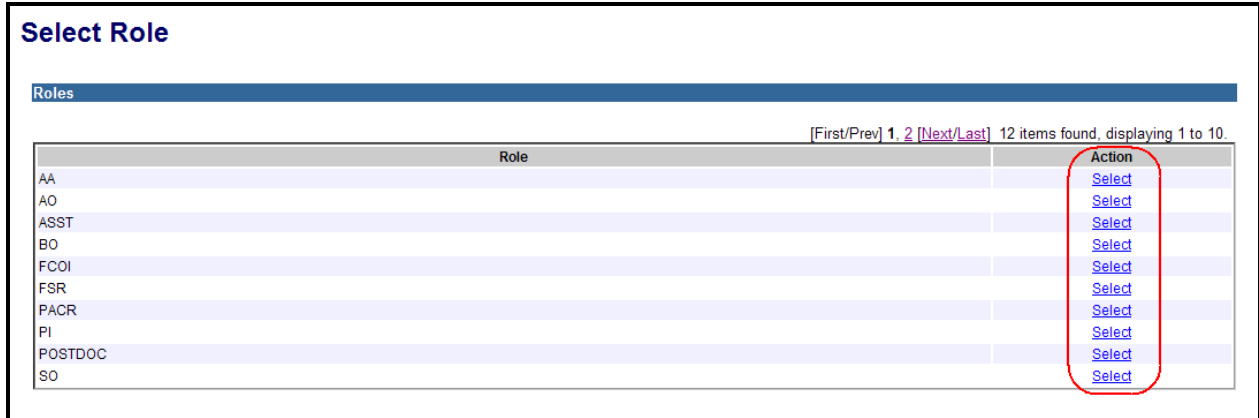
Figure 29: Select Role Screen

> 2. Click the **Select** hyperlink for the appropriate role.

The system adds the role to the user's account being managed.

If the system determines that an Agency or Institute/Center (IC) or Institution affiliation is required, the system displays a prompt message.

NOTE: Agency affiliation is not applicable to users with Commons roles. For Commons' roles, the system displays the institution of the user logged in.

> 3. If an Agency, IC or Institution affiliation is required, then click the **magnifying glass** icon in the **Organization** column.

The system displays the appropriate Agencies, or IC(s) on Institutions. The results are limited to a default of twenty agencies or IC(s). If the search criteria returned more that the default number or if no results are returned, the appropriate error message is generated. Refer to *Section 10 – Error Messages* for more information.
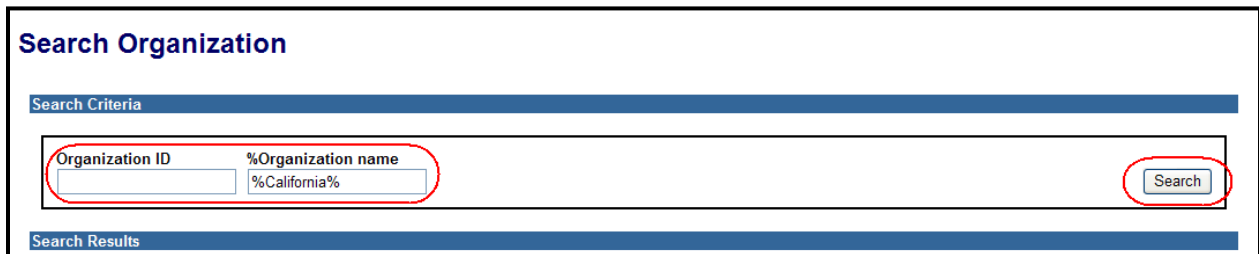
Figure 30: Select Organization Screen

> 4. Type in the **Organization ID** or **Organization name** and click the **Search** button.

NOTE: The percent sign (%) may be used to search on a string pattern for the **Organization name**.

The system displays the appropriate agency, IC or institution.

Figure 31: Search Organization Screen

> 5. To move forward or backward in the list, click the appropriate **Page Number**, **First**, **Prev**, **Next** or **Last** hyperlink.

> 6. Select the appropriate agency, IC or Institution.

The system displays the appropriate agency, IC or Institution in the Organization Name textbox.

> 7. To add another role and organization, select the **Add** hyperlink in the **Action** column.

The system adds a row with blank **Role** and **Organization** boxes on the *Modify Account* screen.

Figure 32: Roles Section of Modify Account Screen

>> a. Repeat the above steps to add another role.

> 8. When finished, perform one of the following options on the *Modify Account* screen:

>> a. To complete adding the role, click the **Save** button.

>> b. To clear the screen, click the **Clear** button.

>> c. To cancel adding the role, click the **Cancel** button

If the **Save** button is clicked, the system saves the changes, recalculates the Early Stage Investigator (ESI) status for the PI, TRAINEE, SPONSER and POSTDOC roles and displays the modified role information. The following informational message is displayed: *The account <USER ID> has been successfully updated (ID: 200513).*

The system sends an email notification to the user whose account is being managed. Refer to *Section 9 – eMail Notifications – Modify Account eMail* for more information.

8.3 Delete User Role

Users with the appropriate privileges may delete a role from a user's account.

Figure 33: Modify Account Screen Displaying Delete Feature

1. To delete a role from a user's account, click the **Delete** hyperlink in the **Action** column.

The system performs the following validation:

- If the role is SO, the system displays the *Commons Reassign* screen.

- If the role is SO and there is only one SO at the Institution, the displays an error message. Refer to *Section 10 – Error Messages* for more information.

- If the last role is being revoked, the system displays the following warning message: *You are about to un-affiliate this individual from your institution. Are you sure you want to proceed?* Selecting the appropriate button continues or cancels the deletion.
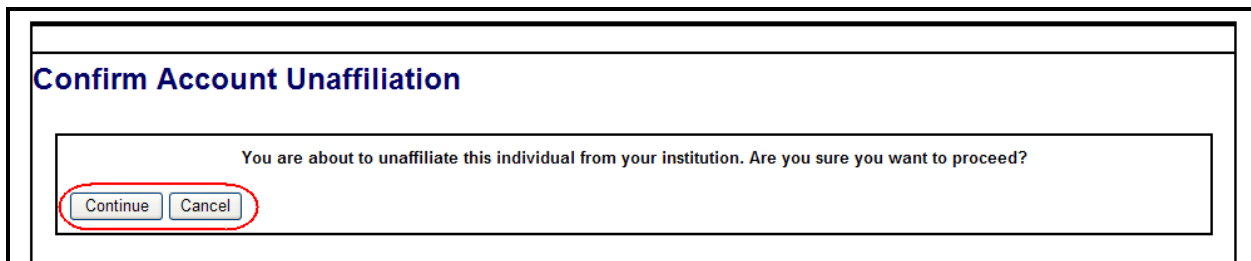
Figure 34: Confirm Account Unaffiliation Screen

- The system checks to see if the user being unaffiliated from the primary Institution is still affiliated with another Institution. If the user is still affiliated with another Institution, then the system sets randomly one of the other affiliated Institutions as the primary one.

2. Perform one of the following options:

    a. Click the **Save** button to complete the role deletion.

    b. Click the **Clear** button to clear out the role and organization.

    c. Click the **Cancel** button to exit the screen and cancel the changes.

If all system validations pass when the **Save** button is clicked, the system removes the role and affiliation, if appropriate, from the account, displays the role changes, and displays the following informational message: *The account <USER ID> has been successfully updated (ID: 200533).* The system sends an email notification to the user about the account changes. Refer to *Section 9 – eMail Notifications – Modify Account eMail* for more information.

8.4 Lock/Un-lock Account(s)

Account Management provides the ability to lock/unlock accounts. Users cannot log onto the system when their account is locked. An account can be locked:

- When a user exceeds the maximum number of login tries

- When the account is manually locked by the system administrator at the Institution

NOTE: This functionality is available to internal NIH staff.

To change the account's lock/unlock status:

1. Select the **Lock** or **Unlock** button in the **Administrative Functions** section on the *Modify Account* screen.

Figure 35: Modify Account Screen Displaying Lock/Unlock Feature

The system updates the account and displays the following message: *The account <USER ID> has been successfully updated*.

The system sends an email notification to the user whose account is being locked or unlocked. Refer to *Section 9 – eMail Notifications – Modify Account eMail* for more information.

8.5 Reset Password

Account Management provides the ability to reset a user's password. The password can be reset to a system-generated password when a user forgets their password and cannot log onto the system or when the maximum number of logins has passed and users are locked out of an account. Resetting the password changes the account status from *locked* to *unlocked*.

Figure 36: Modify Account Displaying Reset Password Feature

1. To reset the password, select the **Reset Password** button.

The system displays the *Reset Password* screen. The following fields appear on the *Reset Password* screen.

- **User ID**

- **Email address**

- **Submit**

- **Cancel**

Figure 37: Reset Password Screen

2. Enter the **User ID** and the **Email Address**.

3. Click the **Submit** button to update the account or click the **Cancel** button to exit the screen and cancel the changes.

If the **Submit** button is clicked, the system performs validation checks. For more information, refer to *Section 10 – Error Messages*. If there are no validation errors, the account is updated with a temporary password and the user is returned to the *Modify Account* screen. The following informational message is displayed: *Password reset succeeded. New password has been sent to <Actors email address>*. The system sends an email notification to the user whose password is being reset. Refer to *Section 10 – eMail Notifications – Modify Account eMail* for more information.

If the **Cancel** button is clicked, the system returns to the *Modify Account* screen?

8.6 Create Affiliation

Account Management provides the ability to create an affiliation. An affiliation can be created for accounts that are either not currently associated with an institution, such as an account solely with the Internet Assisted Reviewer (IAR) authority role, or for accounts that need to be associated with multiple institutions. Users with the AA or SO role may create an affiliation for their organization only.

NOTE: Only accounts with IAR, PI, TRAINEE, POSTDOC or SPONSER roles may have multiple affiliations. If an account has any roles in addition to these, the affiliation cannot proceed.

To start creating an affiliation, the **Search outside your institution** checkbox must be unchecked on the *Search Accounts* screen.

Figure 38: Search Accounts Screen Displaying Create Affiliation Hyperlink

1. To create the affiliation, click the **Create Affiliation** hyperlink in the **Action** column on the *Search Accounts* screen for the appropriate account.

The system displays the *Modify Account* screen. The following fields are on the *Modify Account* screen:

- **User Type**

- **User ID**

- **First Name**

- **Middle Name**

- **Last Name**

- **E-mail Address**

- **Confirm e-mail**

- **Role**

- **Organization**

- **Action column**

Figure 39: Modify Account Screen

2. To affiliate an account, add the **Role** and the **Organization** (affiliation) on the *Modify Account s*creen. Refer to *Section 8.2 – Modify Account Add Role* for more information.

3. When the appropriate role(s) and organization has been added, perform one of the following options:

   a. Click the **Save** button to confirm the change.

      i. Click the **Cancel** button to return to the *Search Accounts* screen.

b. Click the **Clear** button to clear out the role(s) and organization.

c. Click the **Cancel** button to return to the *Search Accounts* screen.

If the **Save** button is clicked, the system displays the following message: *The account has been successfully updated (ID: 200533)*. The system sends an email notification to the user whose account has been affiliated to an institution. Refer to *Section 9 – eMail Notifications – Modify Account eMail* for more information.

8.7 Unaffiliate Account

Account Management provides the ability to un-affiliate an institution from an account. Users with the AA or SO role may un-affiliate an account.

Figure 40: Search Accounts Screen Displaying the Unaffiliate Hyperlink

1. To process the un-affiliation, click the **Unaffiliate** hyperlink in the **Action** column on the *Search Accounts* screen for the appropriate account.

The system displays the *Unaffiliate Account* screen. The screen displays the following warning message: *Clicking on the Unaffiliate button will remove all roles related to your institution for this user*.

The following fields are on the *Create Affiliation* screen:

- **User Type**
- **User ID**
- **First Name**
- **Middle Name**

- **Last Name**

- **DoB**

- **E-mail Address**

- **Role**

- **Organization**

- **Action column**

Figure 41: Unaffiliate Account Screen

2. Perform one of the following options:

    a. Click the **Unaffiliate** button to un-affiliate the account from the organization.

    b. Click **Cancel** button to exit the screen.

If the **Unaffiliate** button is clicked, the system displays the following message: *The account <USER ID> has been successfully updated.* The system returns to the *Search Accounts* screen.

9 eMail Notifications

9.1 Create Account Notification for New Profiles

To: <Account holder email >

CC: <Administrator email>

Subject: **eRA <System Name>: Notification of Authentication Credentials and New eRA Account**

Content:

eMail Content: *<Do Not Reply Warning>*

<First Name> <Last Name>,

An eRA account has been created for you on <Creation Date > by <Administrator First Name> <Administrator Last Name>.   Your account details are:

> Account holder: <First Name> <Middle Name> <Last Name>
>
> Username: <Authentication Username>
>
> Organization: <Organization>
>
> System(s): <System Name>
>
> Role(s): <Roles>/<Affiliation>

Shortly, you will be receiving another email containing your password.

To access the system use the username and password provided in these emails.

If you have any questions about the creation of this account or level of access, contact the person who created the account at: <Administrator Email > or <Administrator Phone Number>.

9.2 Create Account Notification for Existing Profiles

NOTE: Link supplied in this email takes user to the latest not completed step in the registration process.

To: <Account holder email>

Subject--> eRA <System Name>: Notification of New Account Requested for <ACCOUNT HOLDER NAME (First Middle Last)>

You have been requested to participate in the <System Name> by <Administrator First Name> <Administrator Last Name> (email: < Administrator Email > from <Institution Name>).

You have been identified as the <Role(s)>.

To ensure that eRA has the appropriate information for you on file, we ask you to:

Step 1. Open the special URL (address on the Internet) that is unique to you using your web browser. This is done by opening the URL specified below:

<Special URL>

Step 2. Verify the applications, committee involvement, and training applications that we have for you on file. Note that the information shown only contains applications that have been awarded and Initial Review Group Committees in which you have participated.

Step 3. Once you have verified your information, add any comments for eRA, and approve the selection. eRA will then review and complete your request. Once completed, you will receive the necessary account information. This generally takes between 2 and 5 business days to complete.

Your account request was created on <Account Creation Date> by <Administrator First Name> <Administrator Last Name>. If you have any questions or concerns, contact the person who created the request at: <Administrator Email>.

9.3 Password Notification for New Account

To: <Account holder email>

Subject--> eRA <System Name>: Notification of Password for New Account

eMail Content: *<Do Not Reply Warning>*

The password associated with your recently created account is <Password>

The above password is temporary. You will be required to change your password the first time you successfully log into the system. On the Change Password page, enter the temporary password in the Current Password field. Please read the instructions on the Change Password page carefully before selecting a new password.

To access the system use the Username provided in the email notifying you of your new account.

9.4 Registration Failed

To: <Commons production support email>

Subject--> Action Required: System error occurred

A system error has occurred and processing of the new registration has not been able to proceed.

The registration details are:

    Institution Name: <Institution Name>

    Registration Status: <Registration Status>

    System(s): <System Name>

    Registration ID: <Registration ID>

    Registration Status: <Registration Status>

9.5 IAR New Reviewer Invitation Email

NOTE: Link supplied in this email takes user to the latest not completed step in the registration process.

To: <Reviewer email>

Subject -> Notification of IAR Reviewer Invitation for meeting <Meeting Identifiers> - <Meeting Title>

Dear Reviewer:

This is a system-generated invitation to the <System Name> Internet Assisted Review (IAR) website in connection with your participation on Special Emphasis Panel/Scientific Review Group <insert meeting identifier>, scheduled for <insert meeting begin/end dates>.

To submit your preliminary written reviews electronically, you will need to log on to the <System Name> Internet Assisted Review (IAR) website with a user name and password. To establish that user name and password, we have set up a special URL (address on the Internet) that is unique to you.

Please visit this web site to create your account as soon as possible or no later than 2 weeks before your reviews are due. Open your Web browser and go to the URL <insert customized registration URL with encrypted person_id> (You can copy and paste this address into the "Location" window of your browser, and press Enter. If the URL doesn't work, make sure it is complete and hasn't been broken over multiple lines. If the URL spans more than one line make sure you are entering all of it in the location window of your browser and that there are no spaces in the address.) Follow the instructions on the screen to enter information about yourself.   You will also be asked to verify the public information that eRA has on file to ensure your information is both accurate and complete.

After submitting your registration request, you should receive a notification about your account activation within 2-5 business days; it will contain the URL for the eRA Commons web site. At that time you will be able to access Internet Assisted Review with temporary password which will be sent to you in a separate email. Please note that you cannot use Internet Assisted Review until your account is active.

If you have questions or problems setting up your account, please call or email the NIH eRA Helpdesk at 301-402-7469 or 866-504-9552 or commons@od.nih.gov.

Thank you for your time and effort.

Sincerely,

<SRO First Name SRO Last Name>, <degree>
Scientific Review Officer

<SRA address>
Phone: <sra phone number>
Email: <sra email address>

9.6 IAR Reviewer with Commons Account Invitation

To: <Account holder email>

Subject -> Notification of IAR Reviewer Invitation for meeting <Meeting Identifiers> - <Meeting Title>

Dear Reviewer:

This is a system-generated invitation to the <System Name> Internet Assisted Review (IAR) website in connection with your participation on Special Emphasis Panel/Scientific Review Group <insert meeting identifier> meeting, scheduled for <insert meeting begin/end dates>.

To submit your preliminary written reviews electronically, you will need to log on to the <System Name> Internet Assisted Review (IAR) web site with a user name and password. Our records indicate that you have previously established an Internet Assisted Review user account.

Your user name is <Commons Username>.

Please open your Web browser and go to the <System Name> URL <System logon url>. (You can copy and paste this address into the "Location" window of your browser, and press *Enter*. If the url doesn't work, make sure it is complete and hasn't been broken over multiple lines. If the url spans more than one line make sure you are entering all of it in the location window of your browser.) Follow the instructions on the screen to log in to eRA Commons. After successfully logging on, click on Internet Assisted Review on the Commons main menu bar. Please follow "Tips for Reviewers" <http://era.nih.gov/files/tips_processing_documents.doc> for submitting critiques.

Note: To process your reimbursement in a timely manner, please make sure that your banking information is complete. You can enter or update your personal banking information securely from Commons. After you access Commons (as described in the paragraph above) click on Personal Profile on the Commons main menu bar. Then click Residential Address submenu. On the Residential Address page you will be provided with a link to ACH payment system ("Link to Reviewer Payment System") where you can verify and/or update your personal banking information.

If you have questions or encounter problems accessing Internet Assisted Review, please contact me or call the NIH eRA Helpdesk at 301-402-7469 or 866-504-9552.

Thank you for your time and effort.

Sincerely,

<SRO First Name SRO Last Name >, <degree>
Scientific Review Officer
<SRA address>
Phone: <SRA phone number>
Email: <SRA email address>

9.7 IAR Reviewer in Pending Reviewer Status

To: <Account holder email>

Subject -> eRA Commons: IAR Reviewer Invitation for meeting <Meeting Identifiers> - <Meeting Title>

Dear Reviewer:

This is a system-generated invitation to the eRA Commons Internet Assisted Review (IAR) website in connection with your participation on Special Emphasis Panel/Scientific Review Group <insert meeting identifier> meeting, scheduled for <insert meeting begin/end dates>.

Your action is required. Our records show that you have started but have not completed the process to create your eRA Commons Internet Assisted Review (IAR) account. Please visit this web site to complete your account request as soon as possible. Open your Web browser and go to the URL <insert customized registration url with encrypted person_id> (You can copy and paste this address into the "Location" window of your browser, and press Enter.) Follow the instructions on the screen. To ensure your information is both accurate and complete you will also be asked to verify the public information relating to your grant and committee service history that NIH has on file for you.

After submitting your registration request, you should receive a notification about your account activation within one week; it will contain the URL for the eRA Commons web site. At that time you will be able to access Internet Assisted Review with temporary password which will be sent to you in a separate email. Please note that you cannot use Internet Assisted Review (IAR) until your account is active.

If you have questions or problems setting up your account, please call or email the eRA Help Desk at 1-866-504-9552 (tty: 301-451-5939) or commons@od.nih.gov <mailto:commons@od.nih.gov>.

Thank you for your time and effort.

Sincerely,

<SRO First Name SRO Last Name >, <degree>
Scientific Review Officer
<SRA address>
Phone: <SRA phone number>
Email: <SRA email address>

9.8 IAR Reviewer in Pending NIH Status

To: <Account holder email>

Subject -> eRA <System Name>: IAR Reviewer Invitation for meeting <Meeting Identifiers> - <Meeting Title>

Dear Reviewer:

This is a system-generated invitation to the eRA <System Name> Internet Assisted Review (IAR) website in connection with your participation on Special Emphasis Panel/Scientific

Review Group <insert meeting identifier> meeting, scheduled for <insert meeting begin/end dates>.

Thank you for completing the NIH Commons IAR account creation process for the User ID <USER_ID>. NIH Data Quality staff is currently evaluating your account request. You should receive a notification about your account activation within one week; it will contain the URL for the eRA Commons web site. At that time you will be able to access Internet Assisted Review with temporary password which will be sent to you in a separate email.

If you have questions, please contact me or call the eRA Helpdesk at 1-866-504-9552 (tty: 301-451-5939) or commons@od.nih.gov <mailto:commons@od.nih.gov>.

Thank you for your time and effort.

Sincerely,

<SRO First Name SRO Last Name >, <degree>
Scientific Review Officer

<SRA address>
Phone: <sra phone number>
Email: <sra email address>

9.9 IAR Reviewer Account Activation

To: <Account holder email>

Subject → eRA <System Name>: Your reviewer account, <USERNAME>, has been activated

Dear Reviewer:

This is a system-generated invitation to the eRA <System Name> Internet Assisted Review (IAR) website in connection with your participation on Special Emphasis Panel/Scientific Review Group <insert meeting identifier> meeting, scheduled for <insert meeting begin/end dates>.

An eRA <System Name> account has been created for <USERNAME> with this User ID <User_ID>. This account gives you access to the eRA <System Name>, including Internet Assisted Review (IAR).

This is one of two emails you will receive that contains your login information. In accordance with our security policy, your Username and password may not be sent in the same email.

Shortly, you will be receiving the second email from the eRA <System Name> containing your password.

Please open your Web browser and go to the eRA <System Name> URL <Login page> (You can copy and paste this address into the "Location" window of your browser, and press *Enter*). Follow the instructions on the screen to log in to eRA <System Name>. After successfully logging on, click on Internet Assisted Review on the <System Name> main menu bar. Please follow "Tips for Reviewers" <http://era.nih.gov/files/tips_processing_documents.doc> for submitting critiques.

Note: To process your reimbursement in a timely manner, please make sure that your banking information is complete. You can enter or update your personal banking information securely from eRA <System Name>. After you access eRA <System Name> (as described in the paragraph above) click on Personal Profile on the eRA <System Name> main menu bar. Then click Residential Address submenu. On the Residential Address page you will be provided with a link to ACH payment system ("Link to Reviewer Payment System") where you can verify and/or update your personal banking information. In the process of verifying your account, the eRA had the following comments:

<Comments>

9.10 Trainee Registration Invitation

To: <Trainee Email>

Subject: eRA Commons – xTrain: Create an Account

Dear Trainee:

This is a system-generated invitation to the eRA Commons xTrain website in connection with your participation as a Trainee for Program Director [PI name] on a Grant [Grant #].

To participate in the Appointment and/or Termination forms submission, you will need to log on to the eRA Commons website with a user name and password.

Please visit this web site to create your account as soon as possible. Open your Web browser and go to the URL <insert customized registration url with encrypted person_id> (You can copy and paste this address into the "Location" window of your browser, and press Enter. If the URL doesn't work, make sure it is complete and hasn't been broken over multiple lines. If the URL spans more than one line make sure you are entering all of it in the location window of your browser and that there are no spaces in the address.)

Follow the instructions on the screen to enter information about yourself. You will also be asked to verify the public information that NIH has on file to ensure your information is both accurate and complete.

After submitting your registration request, you should receive a notification about your account activation within 2-5 business days; it will contain the URL for the eRA Commons web site. At that time you will be able to access xTrain with temporary password which will be sent to you in a separate email. Please note that you cannot use eRA Commons xTrain system until your account is active.

9.11 Trainee in Pending Trainee Status

To: <Account holder email>

Subject → eRA Commons – xTrain: Complete Account registration

Dear Trainee:

This is a system-generated invitation to the eRA Commons xTrain website in connection with your participation as a Trainee for Program Director [PI name] on a Grant [Grant #].

Thank you for completing the eRA Commons account creation process. NIH Data Quality staff is currently evaluating your account request. You should receive two emails within 1 week indicating that your account is active. One email will contain the URL for the eRA Commons web site and the second email will contain your temporary password. You will be prompted to change it upon successful login into Commons for the first time. Please note that you cannot use eRA Commons - xTrain system until your account is active.

For any further questions about this email, please contact the eRA Help Desk at our preferred method of contact http://ithelpdesk.nih.gov/eRA/ or call 1-866-504-9552 (tty: 301-451-5939) or commons@od.nih.gov .

Please access the Commons at https://public.era.nih.gov/commons

9.12 Trainee Account Activation

To: <Trainee Email>

Subject → eRA <System Name>: An account has been created for <User Name>

Dear Trainee:

This is a system-generated invitation to the eRA <System Name> website in connection with your participation as a Trainee for Program Director [PI name] on a Grant [Grant #].

An eRA <System Name> account has been created for <USERNAME>. This account gives you access to the eRA <System Name>.

To participate in the Appointment and/or Termination forms submission, you will need to log on to the eRA <System Name> website.

This is one of two emails you will receive that contains your login information. In accordance with our security policy, your username and password may not be sent in the same email.

Shortly, you will be receiving the second email from the eRA <System Name> containing your password.

Please open your Web browser and go to the eRA <System Name> URL <Login page> (You can copy and paste this address into the "Location" window of your browser, and press *Enter*). Follow the instructions on the screen to log in to eRA <System Name>.

When verifying your account, the eRA had the following comments:

<Comments>

9.13 Email to PI that Trainee Account Now Active

To: [PI Email] AND [xTrain Delegate Email]

Subject → eRA <System Name>: Trainee [Trainee Name] registered for Account

Trainee [Trainee Name] eRA <System Name> account has been activated by eRA.

Trainee eRA <System Name> User ID is: [Trainee Commons User ID]

9.14 Approve Account Request

To: <Account holder email>

CC: <Administrator email>

Subject → eRA Commons: An account has been created for <User Name>

eMail Content: *<Do Not Reply Warning>*

An eRA Commons account has been completed for you with the user ID <Insert User Name> with the following user ID <USER_ID>. Your role is that of a <Role(s)>. This role provides your account with a certain level of access to the eRA <System Name>.

This is one of two emails you will receive that contains your login information. In accordance with our security policy, your Username and password may not be sent in the same email.

Shortly, you will be receiving the second email from the eRA Commons containing your password.

Once you have completed account setup and have logged into the eRA Commons, if you have PD/PI Role, please select the menu items Status and then List of Applications/Grants to view your existing support. If this information is incomplete, you may request additional NIH support to be added to your account by selecting the menu item ADMIN/ACCOUNTS and then VERIFY NIH SUPPORT menu items and then add additional NIH Support. Follow the instructions on how to add additional support to your account.

Please note that when the NIH verified your account, the NIH had the following comments:

<Comments>

9.15 NIH Support Reviewed

To: <Account holder email>

Subject--> eRA <System Name>: NIH Support for Your Profile has been Reviewed

The request to review NIH Support for <User First Name> <User Last Name> associated with account <User_ID> has been completed. You should now be able to access eRA <System Name>.

<Insert System specific footer>

9.16 Reject Account Request

When: User (for whom account has been requested) has determined that the entire account request was in error and rejects the account request.

To: <Initiator of the account request> (not the account holder email!!!)

Subject--> eRA <System Name>: Rejection of eRA Account Request

eMail Content: *<Do Not Reply Warning>*

The eRA account request that you had initiated for [<User First Name> <Middle Name> <Last Name>] at <User email> has been rejected by that individual. Their reason for this action is as follows:

<Comments>

As such, the account information has been reset. Please modify the appropriate information and if desired, resubmit this request.

If you have any questions about this email, please contact <Initiator First Name> <Initiator Last Name> at <mailto:initiator_email_addr>, who initiated this action.

9.17 Decline Request Account

To: <Account Requester email>

Subject → eRA Commons: Decline of Account Request

eMail Content: *<Do Not Reply Warning>*

The account request for <Authentication Username> has been declined. The reason for this action is as follows:

<Comments>

9.18 Modify Account

The *Modify Account Email* is generated by the system to the person who owns the account that has been modified or for which roles have been updated.

Notes: This email should be generic for any system.

When: Administrator modifies user account

To: <Account holder email >

CC: <Administrator email>

Subject: Notification of eRA Account Modification for <System Name>

eMail Content: *<Do Not Reply Warning>*

Your eRA account for username "<Authentication username>" was modified on <modification date time> by <Administrator First Name> <Administrator Last Name>, an administrator of the <System Name>, as follows:

> Email Address: <email address>

Your account has been affiliated with the following organization(s):

> Role(s) Granted: <Roles>/<Affiliation>

Your account has been unaffiliated with the following organization(s):

> Role(s) Revoked: <Roles>/<Affiliation>

> Lock Status: <Lock Status>

If you have questions, please contact your administrator at <Administrator email> or <Administrator Phone Number>.

9.19 Reset Password Email

To: <Account Holder email>

Subject--> eRA <System Name>: Notification of eRA Account Modification

The eRA <System Name> password has been reset for the account belonging to <Account Holder First Name> <Account Holder Last_Name>. The new password is as follows:

Password: <Password>

The above password is temporary. You will be required to change your password the first time you successfully log into the eRA <System Name>. On the change password page, enter the temporary password in the Current Password field. Please read the instructions on the Change Password page carefully before selecting a new password.

10Error Messages

10.1 Search Account Error Messages

- Search cannot find the data that matches the search criteria.

  No results match provided search criteria. Please try using different search criteria.

- Search exceeds the maximum number of resulting records.

  Search request returned too many records to display. Please narrow the search criteria and try again.

- The system determines that the **Role**, **User ID**, **First Name**, **Middle Name** or **Last Name** is blank.

  You must enter a name or user id to continue search

- The system determines that less than two characters were entered in **Last Name.**

  You must search on more than two characters.

- The system determines that less than three characters were entered in **First Name**, then the following error message is displayed:

  You must search on three or more characters.

- The system determines that the **Account Status:** field is not affiliated.

  You are not able to search on User ID or Role if Account Status parameter is 'Not affiliated.

- The system determines that the **Continuous Submission (CS) Eligible Only** box is checked and the PI role is not selected.

  You can search for CS Eligible individuals only if you select PI roles as one of your search criteria

- The system determines that the **Institution Search:** box is checked and the **Account Status** is not affiliated.

  Institution search checkbox MUST be unchecked if Account Status = Not Affiliated

10.2 Create Trusted Account Error Messages

- The system determines that all the required data has not been provided.

  Please enter required data.

- The system determines that the Username is not a least six characters.

  Please provide a Username that is at least 6 characters.

- The system determines that the account being created exists for existing credentials.

  An eRA account exists for the credentials provided. Please modify the account instead of creating a new one.

- The system determines that the Username provided already exists for the new credentials.

  Username already exists, please choose another Username. If the existing eRA account is for the same person, please modify the existing account instead of creating a new one.

- The system determines that the Username already exists for an administrative account creation.

  The Username you provided on the registration form has been already taken. Please contact eRA Help Desk.

- The system determines that the provided email addresses do not match.

  The email addresses provided do not match. Please correct the email addresses.

10.3 Create Un-trusted Account Error Messages

- The system determines that email addresses do not match.

  The email addresses provided do not match. Please correct the email addresses.

- The system determines that the Username exists for the new credentials.

  Username already exists, please choose another Username. If the existing eRA account is for the same person, please modify the existing account instead of creating a new one.

- The system determines that the account request is currently being processed.

  A pending account request for this profile already exists. You will be notified via email when NIH completes processing of the pending request.

- The system determines that the Last Name was not entered.

  Please enter data in the Last Name field.

- The system determines that the phone number was not entered.

  Phone is a required field

- The system determines the email address was not entered correctly.

  Please enter data in the email Address field (e.g., [*user_name@domain_name.com*](user_name@domain_name.com)*).*

10.4 Create Demo Account Error Messages

- The system determines that a **First Name** was not entered.

  Please enter data in the First Name field

- The system determines that a **Last Name** was not entered.

   Please enter data in the Last Name field.

- The system determines that a **User Name** was not entered.

   Please enter data in the User Name field

- The system determines that an **EMail Address** was not entered.

   Please enter data in the email Address field (e.g., user_name@domain_name.com)

- The system determines that Usernames are identical.

   The user names entered are identical. Please use different user names.

- The system determines that the **Institution** name was not entered.

   Please enter Institution Name.

10.5 Manage User Roles Error Messages

- The system determines that the SO being removed is the only SO at the Institution.

   Cannot revoke SO role for the only Signing Official (SO) for the Institution. (ID: 30417)

- The system determines that all required information has not been provided.

   Please enter required data.

10.6 Reset Password Error Messages

- The system determines that the User ID and eMail Address were not entered.

   Username and email address are both required.

- The system determines that the account is locked by an administrator.

   This account is locked by an administrator. Please contact administrator in your institution to resolve the issue.

- The system determines that the information entered is invalid or the user is not enrolled in eRA Commons.

   Either the information entered is invalid or you are not enrolled in the eRA Commons. To keep your information secure we may lock your account if you continue to enter incorrect login information. Please see your organization's account administrator for assistance.

11 Appendix A: Acronym List

(Build acronym list of acronyms contained in this document using the following example)

A
AA   Accounts Administrator

AO   Administrative Official

AOR   Authorized Organization Representative

ASST   Assistant

B
BO   Business Official

C
CGMO   Chief Grants Management Officer

CO   Contract Official

D
DOB   Date of Birth

E
eRA   Electronic Research Administration

ESI   Early Stage Investigator

F
FCOI   Financial Conflict of Interest

FOA   Funding Opportunity Announcement

G
GM   Grants Management

GMO   Grants Management Officer

GMS   Grants Management System

H
HHS   Health and Human Services

I
IC   Institute and/or Center

J

JIT	Just-in-Time

_N_

NCAA	NIH Central Accounts Administrator
NIH	National Institute of Health
NLM	National Library of Medicine
NRSA	National Research Service Award

_O_

OER	Office of Extramural Research
OMB	Office of Management and Budget
OPDIV	Operating Divisions
OPERA	Office of Policy for Extramural Research Administration

_P_

PD	Program Director
PD/PI	Program Director/Principal Investigator
PDF	Portable Document Format
PI	Principal Investigator

_R_

R&R	Receipt and Referral
RFA	Request for Application

_S_

SO	Signing Official
SRO	Scientific Review Officer
SSN	Social Security Number

_T_

TA	Training Activities
TN	Termination Notice

_U_

USB	User Support Branch

_W_

WIP	Work In Progress