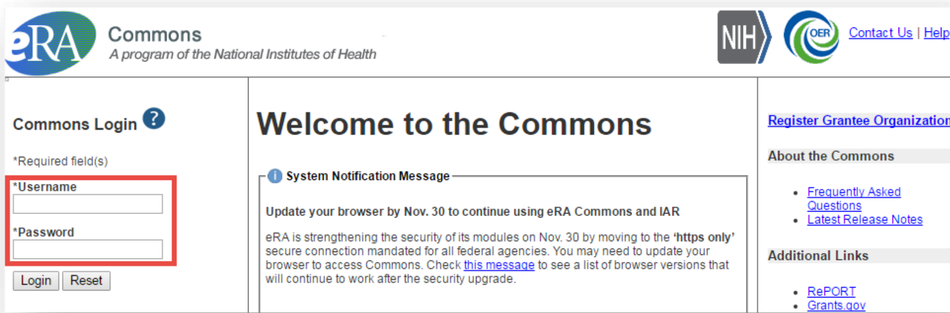
SAMHSA PD Account Creation

A simple step by step guide

1. **Go to eRA COMMONS: [public.era.nih.gov/commons.](public.era.nih.gov/commons)**

2. **Enter Username and Password. Click Login.**



3. **Choose Admin -> Accounts -> Account Management link.**

   a. **Note: This will open the Account Management System (AMS) in a separate window or tab.**

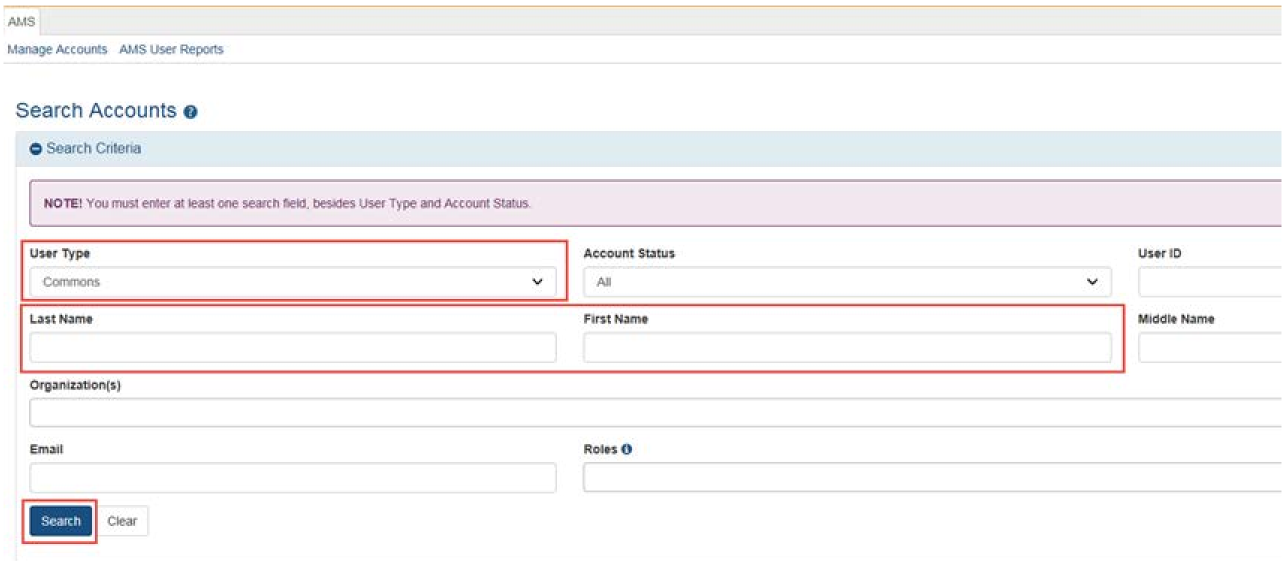
4. **Search for the PD**

   a. **First, ensure the User Type is set to Commons.**

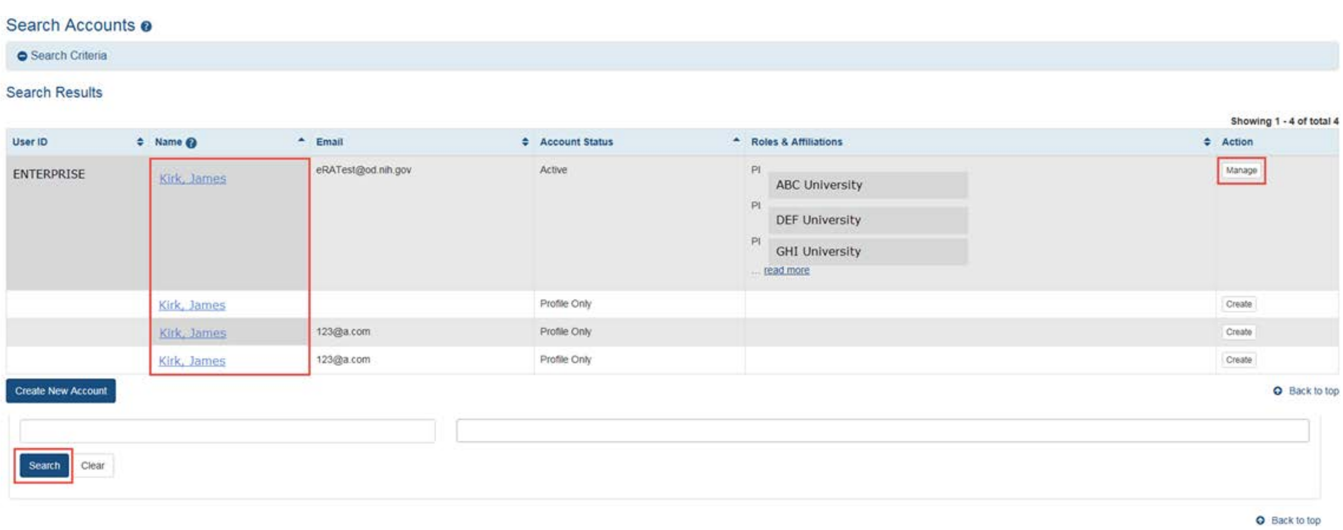
   b. **Enter search criteria such as first and last name.**

      i. **You may use % wild cards if you are uncertain of a field. For Example, Chris% will return results for both "Chris" and "Christopher".**

   c. **When you have entered your criteria, click Search.**



5. **Review the search results to determine if any of the results are applicable to the PD account you are creating.**
    a. **You can click the hyperlinked Name of each account or profile to view a list of applications and review committees associated with name in order to narrow down the results.**
    b. **For records that have accounts, not just a profile, you may also click the Manage button to access additional information.**



6. **If you select Manage for an active account, you will be able to review additional information as shown below:**
    a. **You can also confirm with the PD if the information listed is correct in order to more accurately identify the right PD account.**

User Information

User Type

Commons

User ID

ENTERPRISE

Primary Organization

Monroe County Public Health Department

Contact Information

Last Name	First Name	Middle Name
Kirk	James	

Email	Confirm Email
eRATest@od.nih.gov	eRATest@od.nih.gov

b. Active accounts will also list the affiliated organization(s).

Roles

+ Affiliate

Role(s)	Organization(s)
PI	ABC University
PI	DEF University
PI	GHI University

7. Profiles, which can be accessed by clicking the hyperlinked name after searching for accounts, will display the projects and review committees associated with the profile.

Funding Support

Name Kirk James

Showing 1 - 10 of total 60

Filter:

Show 10 per page « 1 2 3 4 5 6 »

The NIH Support page lists the NIH application information associated with the selected **Principal Investigator (PI)**. Use this information to positively identify PIs associated with your institution.

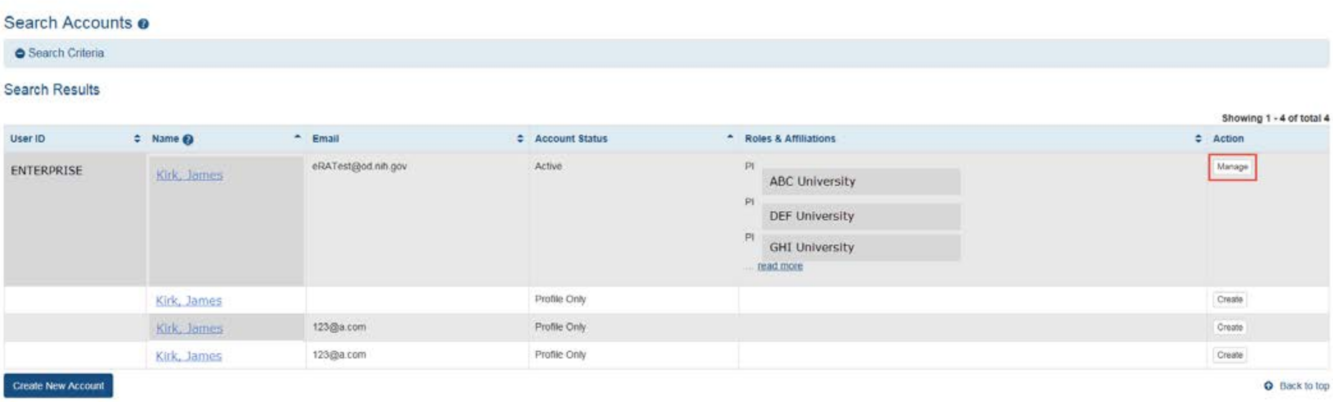
Name	Institution Name	Support Type	Support Identification	Support Description	Support Start Date	Support Status
Kirk James	Starfleet Academy	Principal Investigator	1H79SM123456-01	How to defeat the Borg	2015-09-25	Awarded

8. **Once you have reviewed the PD profiles and accounts, evaluate the next steps. The steps above represent** Scenario 1:

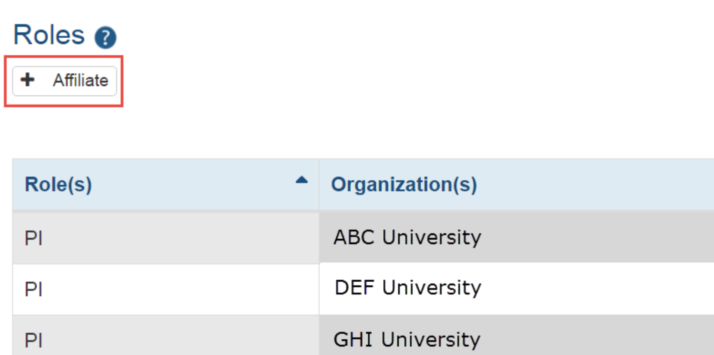
Scenario 1	Scenario 2	Scenario 3	Scenario 4
PD already has an account that is affiliated to the SO's organization	PD already has an account that is NOT affiliated to the SO's organization	PD doesn't have an account, but he/she does have a profile	PD doesn't have an account or a profile
Next Steps: N/A, PD can access applicable information	**Next Steps: Affiliate existing account**	**Next Steps: Convert profile to account**	**Next Steps: Create account and affiliate**

Scenario 2: Affiliating an existing account with your organization

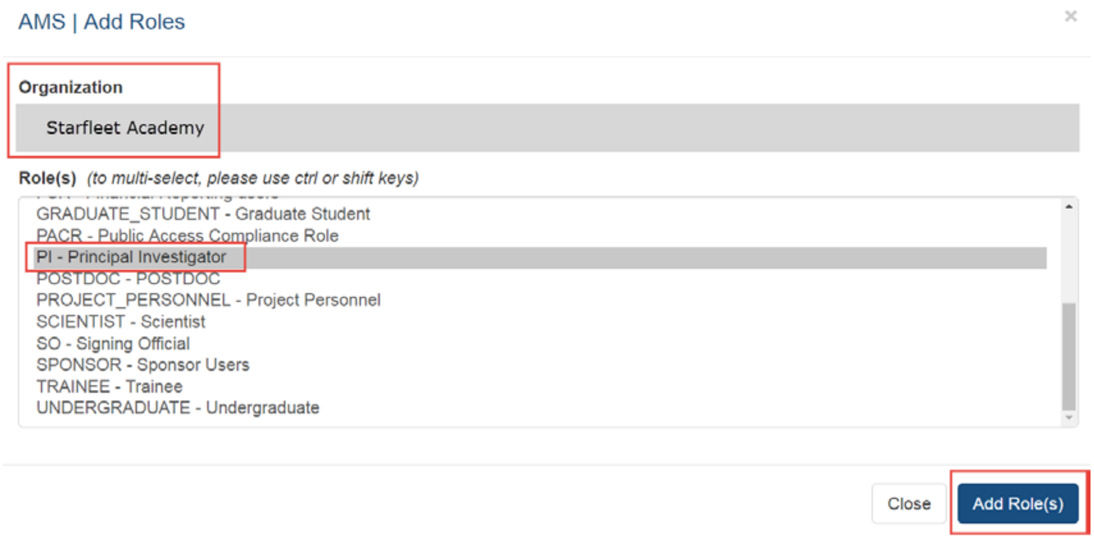
1. **Click Manage for the correct PD account.**



2. **Click Affiliate under the Roles section.**



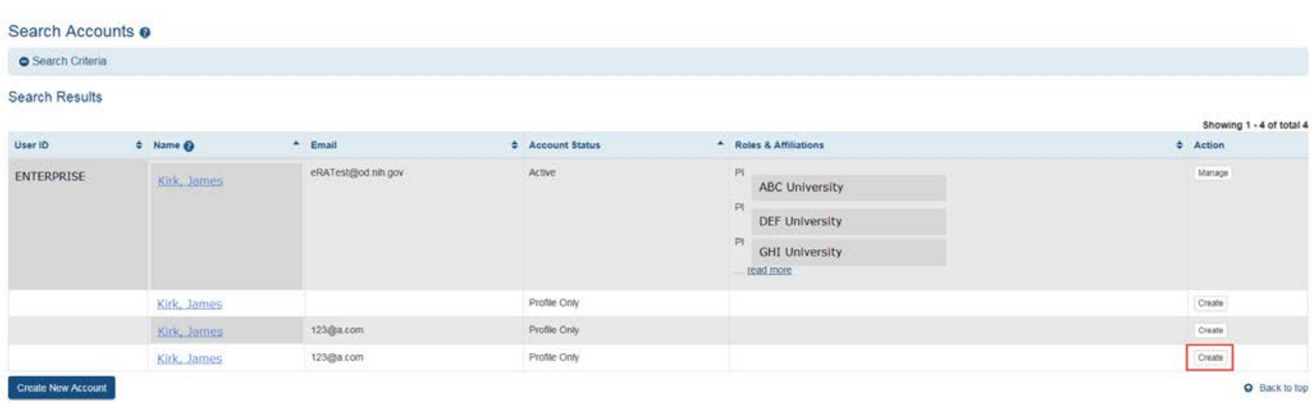
3. **Your organization will be populated automatically. Select PI – Principal Investigator from the Role(s) drop-down menu and then click Add Role(s).**



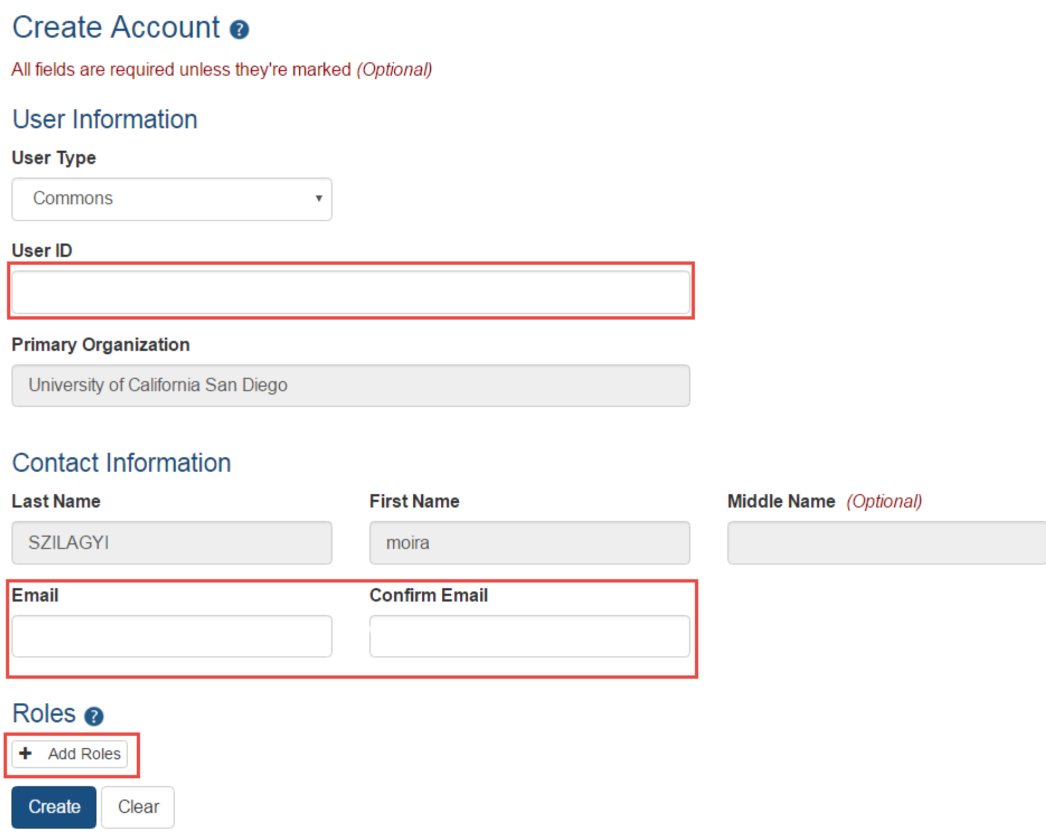
4. **You will be returned to the Roles page, where you will need to click Save.**
   a. **If you have added an incorrect role, you may remove it with the Remove action.**

Scenario 3: Converting a profile to an account

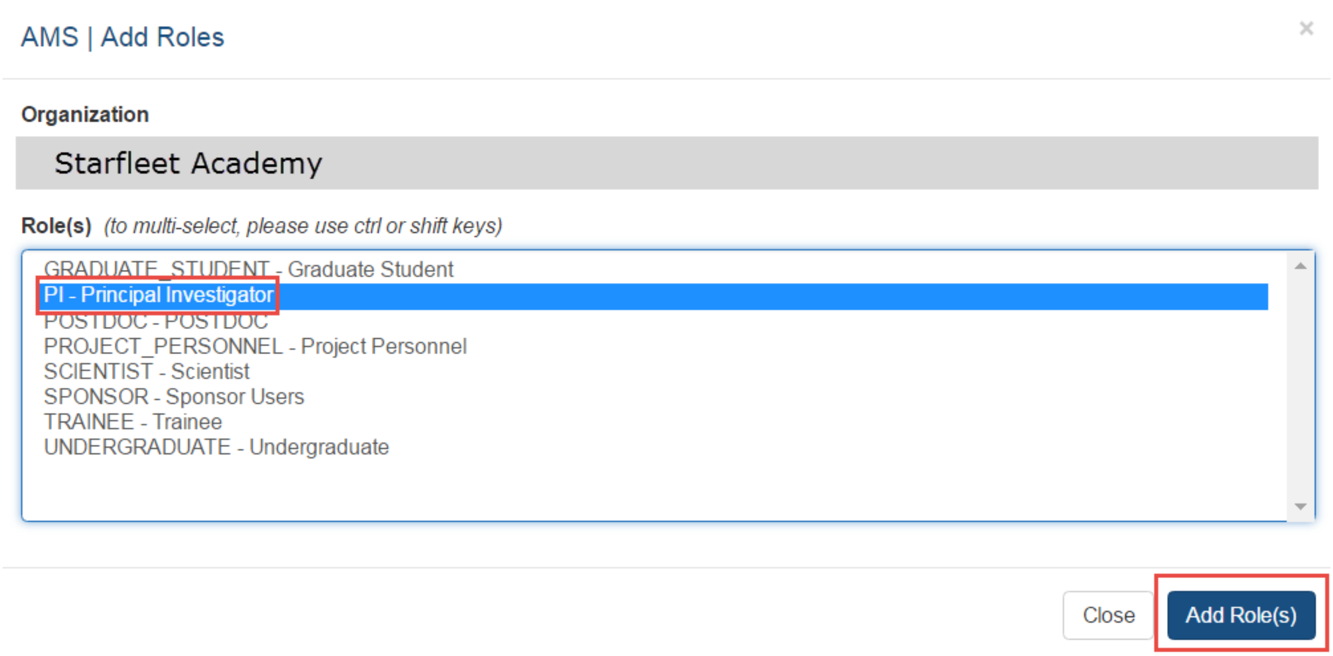
1. **After identifying the correct profile, click Create.**



2. **Input the required information (User ID, email address, and email address confirmation) and then click Add Roles.**

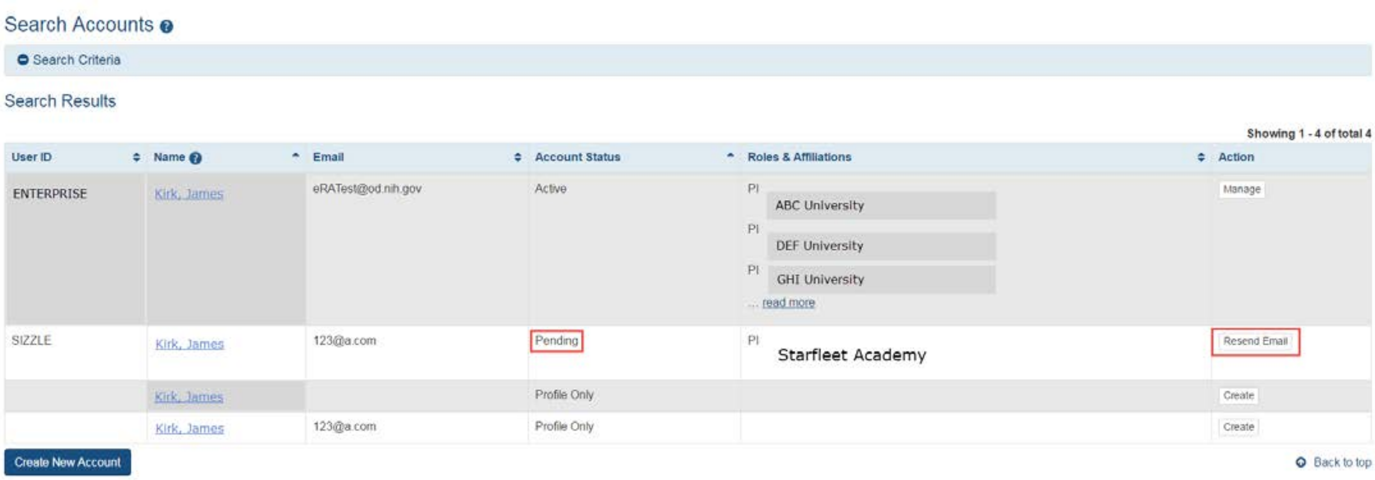


3. **Select the PI – Principal Investigator role from the Role(s) list and then click Add Role(s).**



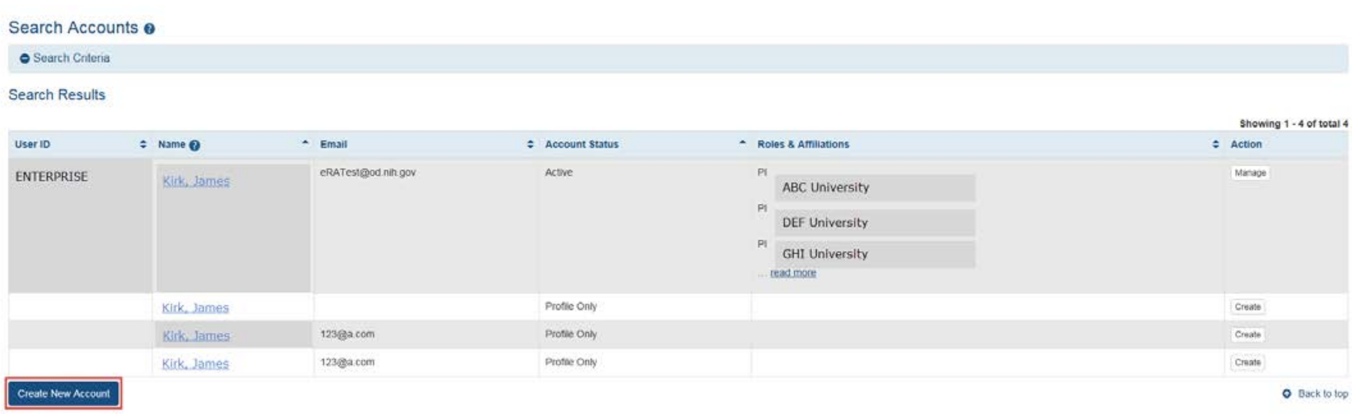
4. **Click Create to create the account. If you added a role by mistake, you may remove it by clicking the Remove button.**

5. **The PD must access their email to verify the account information is correct. If an email needs to be re-sent, the SO can resend it using the Resend Email button.**
   a. **Note: After the PD verifies their email address, NIH will perform a final review before the account status changes from Pending to Active.**

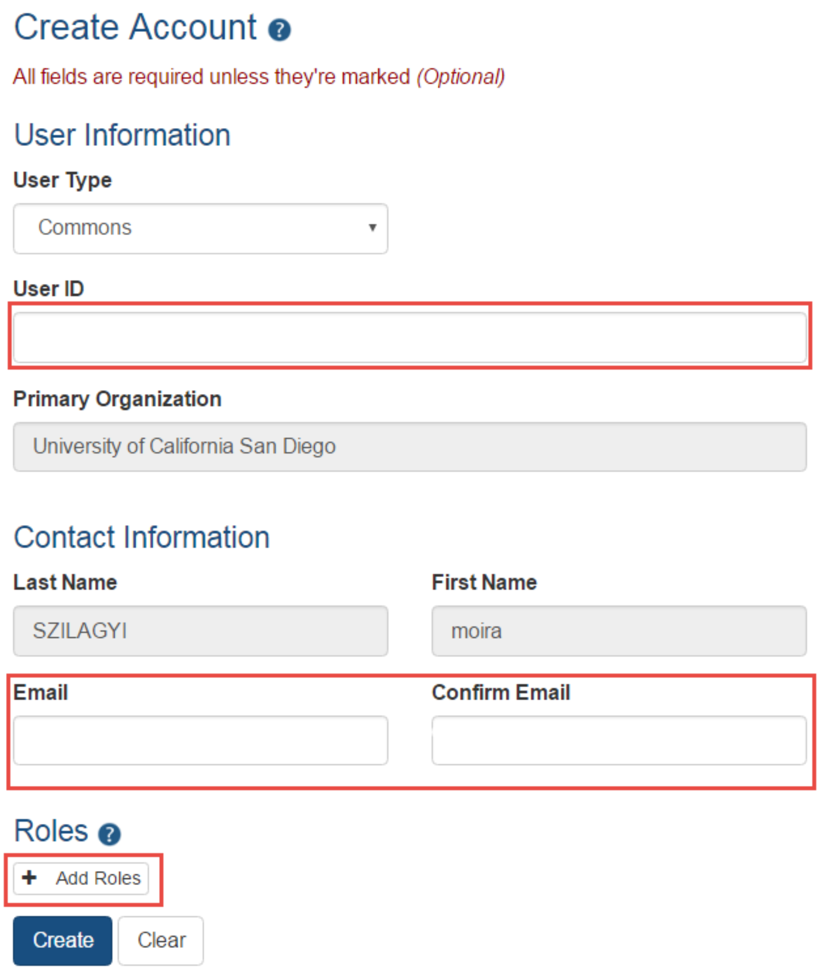


Scenario 4: Creating and affiliating a new account

1. **If no account or profile is correct, click Create New Account.**



2. **Input the required information (User ID, email address, and email address confirmation) and then click Add Roles.**


Create Account

All fields are required unless they're marked *(Optional)*

User Information

User Type

Commons

User ID

Primary Organization

University of California San Diego

Contact Information

Last Name	**First Name**	**Middle Name** *(Optional)*
SZILAGYI	moira	

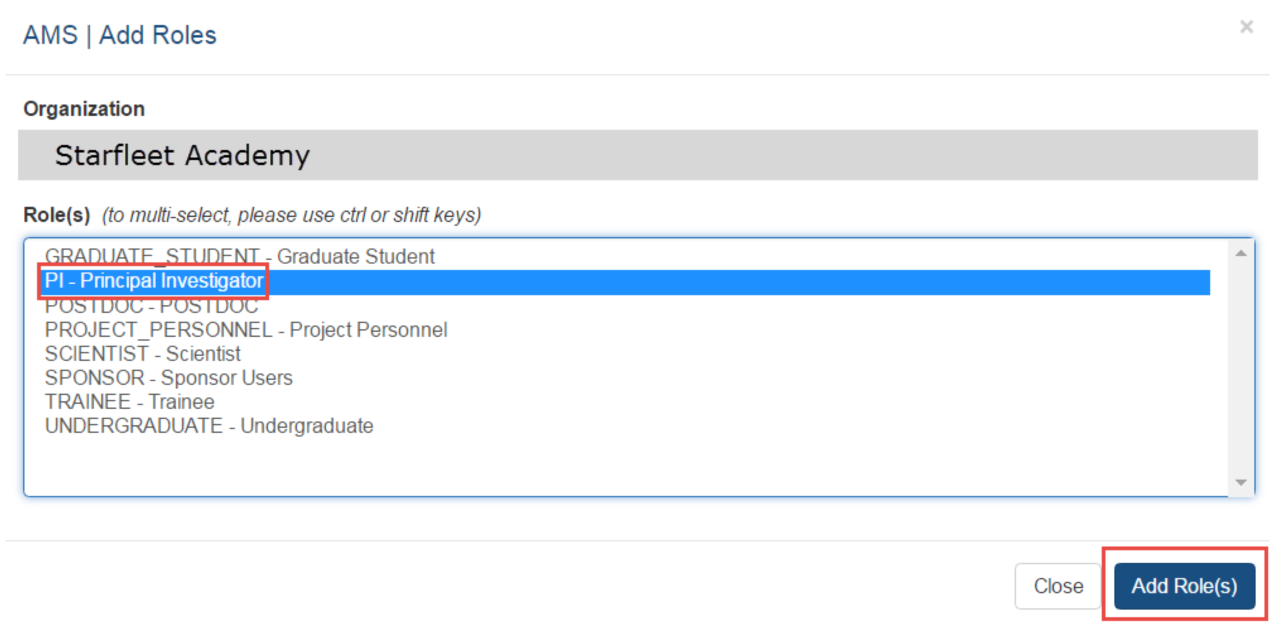
Email	**Confirm Email**

Roles

Add Roles

Create Clear

3. **Select the PI – Principal Investigator role from the Role(s) list and then click Add Role(s).**


AMS | Add Roles

Organization

Starfleet Academy

Role(s) *(to multi-select, please use ctrl or shift keys)*

GRADUATE_STUDENT - Graduate Student
PI - Principal Investigator
POSTDOC - POSTDOC
PROJECT_PERSONNEL - Project Personnel
SCIENTIST - Scientist
SPONSOR - Sponsor Users
TRAINEE - Trainee
UNDERGRADUATE - Undergraduate

Close Add Role(s)

4. **Click Create to create the account. If you added a role by mistake, you may remove it by clicking the Remove button.**

5. **The PD must access their email to verify the account information is correct. If an email needs to be re-sent, the SO can resend it using the Resend Email button.**
    a. **Note: After the PD verifies their email address, NIH will perform a final review before the account status changes from Pending to Active.**