Registering Institutions and Organizations Transcript

Welcome to this video tutorial on Registering Institutions and Organizations in eRA Commons. eRA Commons is used to manage federal applications and awards from submission to closeout. Research administrators, principal investigators, scientists, students, and others, receive access to eRA Commons through their awarded institution or organization.

The process starts with an institution or organization that wishes to submit for an NIH or partner agency grant. One of the first steps is for the institution to register with eRA Commons. In this step, the institution must have an authorized person assigned as the signing official or SO.

A signing official has institutional authority to legally bind the institution in grants administration matters. The label, "Signing Official," is used in conjunction with the NIH eRA Commons. The SO can register the institution, modify the institutional profile, create, affiliate, and modify user accounts, and is responsible for the submission of required reports.

The SO can view all applications and awards within the institution, including status and award details. An SO can view the review outcomes of an application. An SO can create additional SO accounts as well as accounts with any other role or combination of roles. For most institutions, the Signing Official is located in its Office of Sponsored Research, or equivalent.

Before an institution can successfully register in eRA Commons, it must have a valid and verifiable Dunn and Bradstreet (DUNS) number or a Unique Entity Identifier (UEI) which is obtained from the System for Award Management (SAM) registration process. Either of these registrations is used to uniquely identify a business entity and is an NIH requirement. However, the use of DUNS numbers will be discontinued in the near future. We urge you to acquire the UEI as soon as possible.

At the time of initial registration, the SO also has the option of designating an account administrator (AA). The AA is an individual typically located in the institution's central research administration office to help facilitate the administration of eRA Commons accounts.

Here are the steps to register an institution with eRA Commons: On the Commons home page, select the Register Organization link near the center of the page. The Register Institution page is displayed. Note that as you progress from Step 1 through Step 5, all fields marked with a red asterisk are required.

Step 1: Registration Purpose. For this step you select the type of awards your institution will be applying for. You can select the ones that meet your needs. NIH Grants and Contracts: this is the most common type of registration and is required for any application that is funded by NIH. Selecting this option also makes you automatically eligible for the other two options. Non-NIH Grants and Contracts: Selecting this option lets you submit applications offered by partner agencies such as SAMHSA, AHRQ, etc. And NIH Other Transaction Authority Opportunities, also known as OTAs, is for a type of funding that is neither grants nor contracts and is used across NIH.

NOTE: If you select NIH Grants and Contracts, an additional acknowledgment field opens up. The statement reads: I acknowledge I have read and understand the NIH Grants Policy statement regarding the Legal Implications of Applications . The legal implication of applications text is linked to the section on the NIH Grants Policy Statement.

You must check the checkbox at the beginning of the statement to activate the Next button. Click Next.

Step 2: Verify Identification. In this step you verify the identity of your institution by selecting to enter either your DUNS Number or your Unique Entity Identifier (UEI) number. For this example we are using the UEI number obtained by registering with SAM. Click on the Unique Entity Identifier radio button to display the input field. Add your UEI number and click Verify. If the number is correct, a success message is displayed on the screen.

If the UEI cannot be verified, an error message is displayed with suggestions as to what you can check to address the error. Examples include not yet being registered with SAM; an expired SAM registration; or the number was entered incorrectly.

NOTE that the DUNS number option works in the same manner as the UEI. However, as previously mentioned, the DUNS is eventually going to be replaced with the UEI. Once your institution's identity has been verified, click Next to move on to Step 3.

Step 3: Institution Details. Because you added a valid identifier, the primary information for your institution has been pulled in from SAM. You need to complete two fields. The Closeout Email address and the Notice of Award email address.

The Closeout Email address is used by NIH to send any closeout related communications that may be needed as part of the closeout process at the end of the award period. The Notice of Award Email address is used by NIH to send all notices to the institution regarding an award of an application.

Once the two email fields are filled out, click the active Next button to move to Step 4.

Step 4: Accounts. In step 4 you create at least one account. That account is the signing official account. Remember, all fields marked with a red asterisk are required to be completed before moving on to Step 5.

Complete the required fields paying close attention to the criteria for an acceptable username.

Once all the required fields for the signing official are completed, the Next button becomes active. However, you also have the opportunity to create an account administrator. To do this, click the Add an Account Administrator button.

Once you click the Add an Account Administrator button the Next button becomes inactive until you complete all the required fields for the account administrator. If you decide not to create the AA account at this time, but clicked the button to add it, you can close that portion of the screen by clicking the trashcan icon in the upper right corner.

With both the signing official and account administrator details provided, you click on the Next button to move to Step 5.

Step 5: Review and Submit. Step 5 is a chance for you to review all the information provided for both your institution and for the accounts you are creating. If the information is correct, you click the Submit button at the bottom right corner. Take note of the message at the bottom of the screen. Once you click submit, you have 8 days to verify the email address submitted for the SO account. If you do not verify the email address in that time, the registration request is automatically rejected.

Once the Submit button is clicked, a success message is displayed telling you the system will send a verification email to the address of the SO.

NIH sends an email to the designated SO that contains a hyperlink to verify the email address. Click the email hyperlink to verify the email address. The Email verification screen confirms that the email address provided for the SO is valid. NIH then reviews the registration, which is now pending approval.

Once the SOs email address is confirmed and the registration request is reviewed by NIH, a second email is sent stating the status of the application, either approved or rejected. If rejected, the email message will provide information as to why the request was not approved.

If approved, review the institution information. If the information is correct, select the hyperlink in the message to confirm the registration. With the link clicked, the last two registration emails are sent to you. One contains your eRA Commons username and a summary of your institution's information. A second email is sent with a temporary password for logging into eRA Commons.

Use the credentials (username and temporary password) from the two emails to log into eRA Commons. After successfully logging in you are prompted to change the password to one of your own choosing in accordance with the NIH password policy.

It is important to note that with the use of two factor authentication, eRA Commons has moved to a passphrase for password requirements. Create a passphrase to replace the temporary password provided by the registration process. Your passphrase must be 15-64 characters long, it can use all printable characters including spaces. It will have to be updated yearly, and you cannot use your previous 10 passphrases.

Once the temporary password has been successfully changed to your passphrase, the system requires you to log back in, using your new credentials. As the SO, you are presented with an Acknowledgment of Signing Official Responsibilities form.

To complete the registration process you must read the information in the shaded area. You then check the acknowledgment checkbox and the I Accept button is displayed. The final step in the registration of your institution is to click the I Accept button. The system then redirects you to the eRA Commons home page.

With the institution now successfully registered with eRA Commons, the SO and AA can now go about the task of creating new accounts for principal investigators (PIs) and/or affiliate existing PI accounts to their institution.

There are a number of resources available to help you with the registration process and account creation.

> Register in eRA Commons:
> https://era.nih.gov/register-accounts/register-inra-commons.htm
> Understanding eRA Commons Accounts:
> https://era.nih.gov/register-accounts/understanding-era-commons-accounts.htm
> eRA Commons Online Help:
> https://era.nih.gov/erahelp/Commons/default.htm
> eRA Video Tutorials – Institution Registration and Account Creation:
> https://era.nih.gov/era-training/era-videos.htm#Institution

If you need additional help, please contact the eRA Service Desk.

> https://era.nih.gov/need-help
> Toll-free: 1-866-504-9552 (Press 1 for eRA Commons or ASSIST)
> Phone: 301-402-7469 (Press 1 for eRA Commons or ASSIST)

This concludes this tutorial on Registering Institutions and Organizations in eRA Commons. Thank you for watching.