

## Personal Profile Tutorial Transcript

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Welcome to this video tutorial on maintaining your Personal Profile in eRA Commons. When any person receives access to eRA Commons, they are provided with a Personal Profile form (PPF) as part of their account.

The profile is important because it is used in a variety of ways by the funding agency. The information about your education is used to determine your eligibility as a new or early stage investigator. Information about your work history helps identify any conflict of interests reviewers may have with the applications they are reviewing. Demographic information helps the funding agency evaluate its goal to provide a diverse biomedical workforce. Because of these and other factors, it is your responsibility to keep your information current and correct.

When you log into eRA Commons, you access the Personal Profile in a few ways, depending on where you are in the system. From the landing page you click on the large Personal Profile button along the left side of the screen; from the modules icon in the upper left corner of the screen, you select Personal Profile from the menu; and from an older screen, you click the Personal Profile tab from the navigation bar.

The design of the page can be divided into three sections:

- The top navigation tabs.
- The left side dashboard that provides information about you and the status of your profile
- The center of the page where the expandable and collapsible tiles for different information are listed

Along the left side of the screen is the dashboard. The dashboard displays a variety of information. Like your Name, the rolls assigned to your account, and the status of different parts of the profile.

In addition, you can see your Person ID number. This is a unique identifying number for your account generated when your account was created. It is wise to make note of the number should there ever be a need to identify the account as yours.

You also see information about the ORCID ID. ORCID ID is the Open Research and Contributor ID number. This is a personal identifier that distinguishes every researcher across all federal granting agencies, scientific publishers, etc. Within eRA Commons, it links your publications to grants. If you do not have an ORCID ID, the link will take you to the ORCID ID web page where you can register for a number. It is simple and free and we encourage you to register if you have not already done so.

Below the Personal Profile information is the Personal Profile Summary area that shows the overall status of your profile and the status of each of the components of your profile. This quick view is very helpful in letting you know that some required fields are not completed. The sections with missing information are denoted by the red ex icon. The check icon in the Summary box indicates that all the required fields have been completed for that section.

Missing or incomplete information is also specified at the top of the screen and within the section tile itself. Take note of the message at the top of the profile form. It reads: **IMPORTANT:** Changes to your Personal Profile will NOT save if there is any missing data in the required fields. Before navigating away from or closing the Personal Profile, review and enter missing information.

Below the summary area is some information about your account. It shows the last time you made changes to your profile. And how much time you have left before you have to change your eRA Commons password. For your convenience, the Change your password text is a link to the Change Password form. Per NIH policy, passphrases must be a minimum of 15 characters and must be updated at least once a year. And finally there is the eRA Service Desk information area. This includes the phone numbers and a link to the service desk support page.

The main part of the Personal Profile is made of tiles in the center of the page. Each tile represents a different category of information that needs to be completed by you. The number and types of tiles you see will depend on the roles that are assigned to your account.

For example, here are the tiles for a Principal Investigator (the PI role), who is also an NIH Reviewer (the I A R role), and a sponsor for training grants (the SPONSOR role). Because of these roles, the user has the Reviewer Information section, and the xTRACT Information section, in addition to the information required for a PI.

And here are the tiles for a user who is a Signing Official (SO) and a Business Official (BO): You can see that the tile categories for each person are different. This is because the profile system is role specific. The tiles that are presented to you are determined by the roles assigned to your account.

When you first come to the Personal Profile, each tile is collapsed in the initial view. Using the View All button, all of the tiles can be expanded to show the entire Personal Profile form, or you can use the Edit buttons to expand individual tiles in edit mode.

However, once you click the edit button, you will see that all the other edit buttons disappear. When one edit button is clicked, all the categories can be edited. This eliminates the need to click edit and save repeatedly as you complete or update your profile. Just click on the next category to expand it.

Let's look at a couple important categories... Name and I D is a good place to start... For this tile, the critical information will be the email address for account related communications. If you lock your account or need to reset your passphrase because you forgot it, this will be the email account that the system uses to send you a new temporary password.

Another important feature to the personal profile in the Name and I D section is the check box labeled, Replace other email addresses?... This feature makes it easier for you to replace multiple email addresses with one action. When the check box is selected, the system will automatically replace the Awards Communication and Reviewer Correspondence email addresses with the one entered in the field above the check box. You will need to click Yes on the confirmation window to make the change.

Next, let's look at Demographics. You may wonder why the funding agency requests this information. Demographic information is kept confidential and is used for aggregate statistical reporting. It is part of the goal to provide a diverse biomedical workforce.

As stated earlier, Education information is used to determine eligibility for Early Stage Investigator status, and for Trainees it is used to confirm eligibility and to determine their stipends.

Let's discuss saving your profile. Here is the important part, you must complete all the required fields in order for the data to be saved permanently to your profile. The Save All button will refresh the summary information to indicate if you are still missing data. A pop-up warning message displays when the Save All button is clicked but not all the required fields are completed. If you navigate away or close the Personal Profile form before all of the required information is completed, all of your changes will be lost. The system has been designed this way to ensure that users complete all the required fields.

Should you choose not to save your changes by clicking the Discard Changes button, you will be prompted to confirm that you do not want to save the changes and the profile will revert back to the previously saved information.

When you click on a question mark on the screen, it will take you to the help information for that topic.

You then have the option to explore other topics within the help system, or close the browser window.

Because maintaining your profile is so important, you will receive a reminder each year asking you to review all the information to make sure it is current and accurate. The email reminder will be automatically triggered and sent to you on the date your account was created.

There are a number of resources available to you to assist you with your Personal Profile:

- Manage Personal Profile - <https://www.era.nih.gov/register-accounts/manage-personal-profile.htm>
- Overview of Personal Profile - <https://www.era.nih.gov/help-tutorials/personal-profile/overview.htm>
- Online Help - <https://www.era.nih.gov/erahelp/ppf/default.htm>
- eRA Service Desk - <https://www.era.nih.gov/need-help>

This concludes this video tutorial on maintaining your Personal Profile in eRA Commons. Thank you for watching.