

## Personal Profile Tutorial Transcript

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Welcome to this video tutorial on the eRA Commons Personal Profile form. 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 NIH. The information about your education is used to determine your eligibility as a new or early stage investigator. Information about your work history helps ensure we avoid any conflict of interests with reviewers, or if you become a reviewer. Demographic information helps NIH evaluate its goal to provide a diverse bio-medical 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 will access your profile by clicking on the navigation tab labeled Personal Profile. This opens the browser window to the recently updated PPF interface.

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

1. The top navigation tabs, while they have a different look, they are the same tabs you see when you first log into eRA Commons.
2. The left side dashboard that provides information about you and the status of your profile
3. The center of the page where the expandable and collapsible tiles are listed

Along the left side of the window is the dashboard. The dashboard displays a variety of information. It displays information about you: Name, roles, and the status of different parts of the profile.

The Personal Profile section includes your name and the roles assigned to your account. In addition, you will 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 an account as yours.

You will 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 will be used to link your publications to grants. While not yet required, it is wise to get the free ORCID ID by clicking the Create or Connect your ORCID ID link.

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 as denoted by the red ex icon, and red text. The check icon indicates that all the required fields have been completed for that section.

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 Commons password. For your convenience, the Change your password text is a link to the Change Password form. By NIH policy, your password must be updated every 120 days. 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 (PI):

And here are the tiles for a user who is an Administrative Official (AO) with the FSR role:

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.

The summary at the top gives you general information about a problem with a particular category, while the text on the tile for that category will be more specific. And like the dashboard, you will quickly be able to see where you are missing information by the red icons and text.

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 will 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 few 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 password 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.

Next, let's look at Demographics. You may wonder why NIH requests this information. In this case, demographic information is used for statistical reporting only. This is demonstrated by another new feature of the interface that you may have noticed. Along the right side are short explanations about why NIH collects some information and how it is used.

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 determine their stipends.

Let's discuss saving your profile. When you first come to the profile, the system will have pulled in data from the old form if you had an account before this Personal Profile system was implemented. More than likely there will be some required data that will be missing so you will see some red x icons in the Personal Profile Summary.

Here is the important part, whether you are an existing user, or a new user to Commons, you must complete all the required fields in order for the data to be saved permanently to your account. The Save All button will refresh the summary information to indicate if you are still missing data, but if you navigate away from or close the Personal Profile form before all of the required information is completed, all of your changes will be lost.

This is noted at the top of the Summary section. And by a pop-up warning message when the Save All button is clicked but not all the required fields are completed.

For example, on this profile let's fix the issue with the Name and ID category. Open that category by clicking edit... Scroll down to the Citizenship Status and select US citizen. Then click the Save All button.... You will see a dialog message appear that while you updated the profile, the data will not be saved until all the required information is completed. But, you will now see the issue with Name and ID has gone away.

However, if you now leave the personal profile by clicking on the Status tab, this takes you away from the profile form. When you come back to the Personal Profile, you can see the warnings about the Name and ID have come back. You must complete the process of editing, and Saving All until all the issues identified in the summary are cleared away. 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.

Throughout the Personal Profile form, you will see blue circular icons with white question marks. These icons are links to the online help system. When you click on a question mark, the online help system will open a new browser window for you. It will then display the help information for that topic.

For example, if you click the icon next to Reviewer Information, the online help system displays the help for that specific 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 can expect a little reminder each year asking you to review all the information to make sure it is current and accurate. An email reminder will be automatically triggered and sent to you on the date your account was created.

This concludes the overview of the Personal Profile. For additional resources and assistance, please visit [era.nih.gov](http://era.nih.gov). Thank you for watching.