

## Transcript – Personal Profile

\*\*\*\*\*DISCLAIMER!!!\*\*\*\*\*

THIS FILE MAY CONTAIN ERRORS. THIS IS NOT A LEGAL DOCUMENT AND IS NOT FOR USE IN A COURT OF LAW.

\*\*\*\*\*DISCLAIMER!!!\*\*\*\*\*

Welcome. I am Joe Schumaker, Communication Specialist for the Electronic Research Administration.

This video will review the features and functionality of the new interface for the Personal Profile within eRA Commons.

You might ask, why the change?

We felt it was time to give the Personal Profile a new look and feel. One that is fresh, intuitive, and highly functional.

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 biomedical workforce.

Because of these and other factors, it is your responsibility to keep your information current and correct.

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

1. The top navigation, with the same tabs as you will find in the traditional look.
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.

At the very top of the page to the right, you will see your name; your Commons user name; the name of your organization, and your assigned roles.

Below this are the Commons navigation tabs. While they have a different look Along the left side of

It displays information about you:

Your name, your assigned roles, and the status of the different parts of the profile.

Below the Personal Profile Information is the dashboard 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 x icon, and red text. The green check icon indicates that all the required fields have been completed.

Below the status area is an area 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.

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 with the IAR role:

And here are the tiles for a Trainee:

You can see that the tiles for each person are different. This is because the new profile system is role specific. The roles assigned to your account will determine what tiles will be presented to you.

The profile 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 plus view buttons to expand individual tiles.

Take note that if you are using Internet Explorer and the tiles are not displaying correctly, check the compatibility settings of your browser. This will be a button on the address bar or a menu item under Tools.

When completing the profile, you will click the round edit button for a category you want to update.

It will expand to open up the details of that category.

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.

Let's look at a few important categories...

Name and ID 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 new and important feature to the new personal profile in the Name and ID section is the check box labeled, Replace other email addresses?

This new feature will make it easier for reviewers to replace multiple email addresses with one action.

When the check box is selected, the system will automatically replace the Grants Communication and the Reviewer

Correspondence email addresses with the one entered in the field above the check box.

Looking at Demographics.

You may wonder why NIH requests this information. You may also notice another new feature of the interface.

Along the right side are short explanations about why NIH collects some information and how it is used. In this case, demographic information is used for statistical reporting only.

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.

Throughout the Personal Profile form, you will see blue 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.

Let's discuss saving your profile.

When you first come to the profile, the system will have pulled in data from the old form.

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:

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.

For example, on this profile I will fix the issue with the Name and ID category.

So I open that category by clicking edit.

Scroll down to the Citizenship Status and select US citizen.

I will then click the Save All button.

You will now see the issue with Name and ID has gone away.

However, if I now leave the personal profile by clicking on the Internet Assisted Review tab, this takes me away from the profile form.

When I 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 red x icons 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 without leaving the form.

This concludes the overview of the new Personal Profile. Thank you for watching.