



Change PD/PI in eRA Commons

INTRODUCTION

The Department of Commerce has transitioned their grants management system from Grants Online to eRA Commons. You may need to change your Project Director/Principal Investigator (PD/PI) on your award(s) for one of three reasons. The Signing Official (SO) can locate the award to determine which of the following applies:

1. **Your PD/PI is listed as “DOC PD/PI Name, Not Available”**
 - This occurred due to PD/PI accounts for an award in Grants Online not existing in eRA Commons during the migration.
2. **Your PD/PI name is properly listed, but the PD/PI cannot see any of their awards**
 - The name listed may be correct, but it’s not associated with a PD/PI account in eRA Commons and is therefore a “shell”. Please work with your Federal Program Officer (FPO) to confirm if this is the case.
3. **Your PD/PI is correct, but needs to be changed to someone else**

While the reasons may be different, the resolution process is the same. The instructions below will walk you through how to request a change to the PD/PI in eRA Commons.

UNDERSTANDING ROLES IN eRA COMMONS

For more details: [Account Management Information Sheet](#)

NOAA Fisheries grantees are allowed to use the following:

Required roles

- SO: Signing Official
- FSR: Financial Status Reporter
- PD/PI: Project Director/Principal Investigator

Optional roles

- AO: Administrative Official
- AA: Account Administrator

In the table below, N/A means the role cannot complete that Award Action in eRA Commons

Award Action → User Role ↓		Manage User Roles	Revision Requests	Performance Progress Reports	Research Progress Reports	Financial Reports
Admin Role	SO	Search, create and modify SO, AO, AA, FSR, and PD/PI	Only user who can view, modify, and submit	View, modify, and submit	View, modify, and submit PD/PI <i>must</i> initiate	View, modify, and submit when also assigned the FSR role
	AO	Search, create and modify AO, AA, FSR, and PD/PI	N/A	N/A	View	View, modify, and submit when also assigned the FSR role
	AA	Search, create and modify AO, AA, FSR, and PD/PI	N/A	N/A	N/A	View, modify, and submit when also assigned the FSR role
	FSR	N/A	N/A	N/A	N/A	View, modify, and submit
Program Role	PD/PI	N/A	N/A	View, modify, and submit	Only initiate, then route to SO to submit	N/A

Administrative roles are assigned at the Organization/Grantee level, while Programmatic roles are assigned at the award level. For example a user with SO and FSR roles is assigned to the University of X that manages multiple awards, but the PD/PI is assigned to specific award NA24NMF12312345. (continued on next page)

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UNDERSTANDING ROLES IN eRA COMMONS continued

If one person has both Administrative and Programmatic roles they must have 2 separate usernames and passwords (it can be the same email and contact information). It's highly recommended that you distinguish your usernames such as Jane.Doe_Admin and Jane.Doe_PI.

For example, the Admin and Program roles are assigned to the:

Same Person	Different People
Admin Account: Jane.Doe_Admin Role(s): SO and FSR	Admin Account: Jane.Doe_Admin Role(s): SO and FSR
Program Account: Jane.Doe_PI Role: PD/PI	Program Account: Bill.Smith_PI Role: PD/PI
Same contact info, different usernames	Different contact info and usernames

If the SO for the organization and the PD/PI for the award are the same person, it is possible that the SO will be creating their own PD/PI account. If they are different people, the SO and PD/PI will be working together throughout this process - with the support of an AO or AA if applicable.

STEP 1: DETERMINE IF THE USER HAS A PD/PI ACCOUNT

First, make sure that the user has an existing PD/PI account in eRA Commons affiliated with your organization. Any SO, AO, or AA, can locate this information. Instructions for how to locate an account: [PDF Starting on Page 10](#) | [Webinar Starting at 18:25](#)

User has a PD/PI Account in eRA Commons

If the user has a PD/PI Account and you know their eRA Commons ID you can proceed to Step 3: Submit a Revision Request (Page 3 of this document)

User does not have a PD/PI Account in eRA Commons

If the user does not have a PD/PI account in eRA Commons, proceed to Step 2: Create a PD/PI Account (below).

STEP 2: CREATE A PD/PI ACCOUNT

Any SO, AO, or AA can create a PD/PI account. When you create the account, be sure you have basic information from the PD/PI to include:

- First Name, Last Name
- Email Address
- Phone Number
- Preferred eRA Commons User ID*

*eRA Commons User ID

- cannot be modified once your account is created
- must be between 6-30 characters
- can only contain characters @ - . _
- are not case sensitive but will always appear in uppercase letters

Instructions for how to create a PD/PI account:

[PDF Starting on Page 10](#) | [Webinar Starting at 17:00](#) | [Presentation Slides](#)

Finalizing PD/PI Account Information (PD/PI's responsibility)

[Webinar Link](#) | [Webinar Presentation](#)

Once the PD/PI account is created, the PD/PI will receive emails to complete the set-up of their account and create their password. The PD/PI should then log-into their account and ensure all information is provided in their Personal Profile. (continued on next page)



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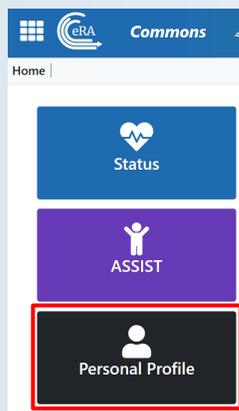
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Finalizing PD/PI Account Information continued



Within the Person Profile: The "Address for Awards-Related Communication" is the email address used for all award information. It is the PD/PIs responsibility to ensure this information is correct.

STEP 3: SUBMIT A REVISION REQUEST

Webinar Starting at 14:06

Once you have the PD/PI eRA Commons ID, you can submit your Revision Request.

NOTE: Only SOs can submit a Revision Request in eRA Commons. AOs and AAs can create PD/PI accounts, but they cannot submit a Revision Request.

The following is required in a PDF attachment to the Revision Request to Change the PD/PI:

- Memo from the SO detailing the Award Number and the eRA Commons ID of the user that should be assigned as the PD/PI on that award
- Reason for the Change in PD/PI (either in the PDF or in the Description of the Request)
- Resume or CV for the PD/PI that should be assigned

Step by Step

1. SO Log-in to eRA Commons and select the Status button from the left hand menu.



2. Select General from the Search Type dropdown menu and/or enter the Project Number and click Search.



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STEP 3: SUBMIT A REVISION REQUEST continued

- Find the award you need to make a revision request to and select the 3 dot ellipses next to the award ID, then select Revision Request.

Status Result - General Search

Application/Award ID	Grants.gov Tracking #	Proposal Title	PD/PI Name	Application Status	Project Period Start	Project Period End	Budget Period Start	Budget Period End
NA22NMF4270131-T1-01	GRANT13507904 Semi-Annual RPPR 1 Revision Request Correspondence	TEST RECORD - A transcriptomic study of the differential stress response between diploid and triploid eastern oyster <i>Crassostrea virginica</i> , and its potential involvement in triploid mortality	Smith, John	Awarded, Non-fellowships only	02/01/2023	01/31/2025	02/01/2023	01/31/2025

- Select the "Change to Principal Director/Principal Investigator" from the dropdown menu and then select Go.

Revision Request

Initiate a Revision Request

Revision Request Sub type: *No Cost Extension - Prior Approval Required

Go

- *No Cost Extension - Prior Approval Required
- No Cost Extension - Prior Approval Waived (Research Terms and Conditions) Extension to Closeout
- *Change in Scope
- Change in Principal Investigator / Project Director

- Fill out all fields and attach all required documentation as listed on Page 3 of this document. NOTE: **PDFs must be flattened before uploading**, please see Page 5 of this document for guidance if needed.

- When all fields are completed and documentation uploaded, at the bottom of the request screen you will see a menu to either Cancel, Delete, Save, or Submit your Revision Request.

Cancel Delete Save Submit

- If you Save your request as a draft, you will navigate back to it by following Steps 1-3 which will show a Revision Request list. Find your in-progress Revision Request, click the 3 dot ellipses and select Continue with Request.

Revision Request List

Existing Revision Requests for Year 1: NA22NMF4270131-T1-01

Request ID	Project Title	Request Type	Submit Date	Status
30538	TEST RECORD - A transcriptomic study of the differential stress response between diploid and triploid eastern oyster <i>Crassostrea virginica</i> , and its potential involvement in triploid mortality	Extension to Closeout		In Progress

Continue with Request

Cancel Initiate a New Revision Request

- Select Submit once the PDF is attached and Revision Request is fully completed.

Cancel Delete Save Submit

- Once the request has been submitted, the status can be tracked through the Revision Request screen (or following Steps 1-3). If the Status says Submitted to Agency, the Revision Request has successfully been forwarded to the agency for review. You can also Initiate a New Revision Request for the same award from this screen.

Revision Request List

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Request ID	Project Title	Request Type	Submit Date	Status
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Preview PDF

Cancel Initiate a New Revision Request

If you have any questions, reach out to your Federal Program Officer or the eRA Help Desk.



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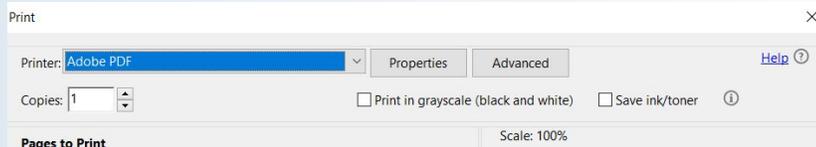
STEP 3: SUBMIT A REVISION REQUEST *continued*

Flattened PDFs

Any PDFs uploaded into eRA must be “flattened” meaning they are removed of any fillable fields. If the PDF does not have fillable fields, you may be able to skip this step.

To flatten a PDF:

- Fill out the PDF.
- When you are done, Select Print.
- Select the Adobe PDF printer and click OK.



- Specify a location to save the flattened version.
- Open the saved file to verify that it retained all saved information and is no longer fillable.
- Upload the “flattened” file to the Revision Request.

Grantees with Multiple Awards

If you have multiple awards that need the PD/PI changed, unfortunately you have to submit a Revision Request to Change the PD/PI for each award. Please discuss any concerns with your FPO and/or Grants Management Specialist (GMS or GS).

Disclaimer: The steps laid out in this document are recommended steps based on our current knowledge of eRA and are subject to change. This is not official procedure, but our current reference information during the transition.

- End of Document -