



# Electronic Research Administration

Sponsored by: The National Institutes of Health, Office of Extramural Research



## xTrain for Institution Users

NIH Regional Workshop – 2008

**Sheri Cummins**

*eRA Customer Relationship Manager*



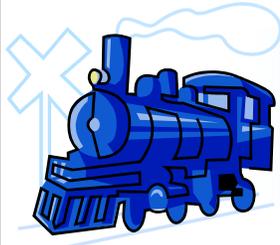
## Agenda

- **xTrain Basics**
  - **Research Training Grants**
  - **What is xTrain?**
  - **xTrain Users & Roles**
  - **Account Set-up**
- **Using xTrain**
  - **PI Delegation**
  - **Appointments**
  - **Re-Appointments**
  - **Terminations**
  - **Amendments**
- **Resources**
- **Finding Help**



## Electronic Research Administration

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## xTrain Basics



## Research Training Programs

- Ruth L. Kirschstein National Research Service Awards (Kirschstein-NRSA)
  - Institutional Training Grants (“T” Awards)
  - *Individual Fellowships (“F” Awards)*
    - *Not yet supported in xTrain*
- Training grants are awarded to domestic institutions that have the facilities and faculty to provide for research training programs in scientific specialties



## Research Training Programs

- Purpose:
  - To develop or enhance research training opportunities for individuals, **selected by the institution** who are training for research careers in specified areas
- Learn more about Research Training Programs at:  
<http://grants.nih.gov/training/nrsa.htm>

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## Research Training Grants

- Training grants are typically awarded for a specific number of Pre-doc and Post-doc “slots” for each budget period
- **Program Directors** appoint **Trainees** to the grant by submitting a **Statement of Appointment** form (PHS 2271) to the Agency
- **Program Directors/Business Officials** must notify the Agency when Trainees are no longer receiving support from the grant by submitting a **Termination Notice** (PHS 416-7)

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## What is xTrain?

- xTrain allows users to electronically process the required paperwork associated with awarded Kirschstein-NRSA training grants
- Grantee institution staff can use xTrain to:
  - create, route and submit Appointments, Re-Appointments, Amendments and Termination Notices
  - track the status and timing of training actions
- xTrain is part of **eRA Commons**, an online interface where grantees and federal staff can access and share administrative grant information

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## xTrain – Production Status

- xTrain made its debut in December 2007
  - Used by nine pilot institutions involved in more than 80 Training Grant Awards
  - Currently implementing pilot participant suggestions for improvement
  - Expect to expand xTrain usage in June 2008
  - *If you'd like to explore using xTrain during this pilot period, please contact*

**Sheri Cummins**  
[cumminss@mail.nih.gov](mailto:cumminss@mail.nih.gov)



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- An eRA Commons account is needed to use xTrain
- The xTrain functions available to users are based on the “roles” associated with their accounts
  - Generally a single eRA Commons user account can have multiple roles
  - Complete list of eRA Commons roles:  
[http://era.nih.gov/files/eRA\\_Commons\\_Roles.pdf](http://era.nih.gov/files/eRA_Commons_Roles.pdf)

- Business Official (BO role)
  - Person working in research institution’s business office who has signature or other authority related to administering training grants
  - BOs are the only users with the authority to submit Termination Notices on behalf of the institution



- Program Director/Principal Investigator (PD/PI; PI role)
  - Responsible for overall direction of the training program
  - Has skills, knowledge, and resources necessary to organize and implement a high-quality research training program
  - Selects and Appoints Trainees, Amends Appointments (when necessary) and initiates Termination Notices



- PD/PI Delegate (ASST role)
  - Person, delegated by the PD/PI, with the authority to perform xTrain-related functions on his/her behalf
  - Same actions and notifications as PI except for the ability to submit Appointments to Agency



*Throughout this presentation assume  
**PD/PI Delegate (ASST) = PD/PI (PI)**  
(except when submitting actions to Agency).*

- Trainee

- Person at grantee institution who will be appointed as a Trainee on a training grant
- Trainees must have the opportunity to carry out supervised biomedical or behavioral research with the goal of developing or extending their research skills and knowledge



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- eRA Commons users with the **Signing Official (SO)**, **Administrative Official (AO)**, or **Accounts Administrator (AA)** role can create accounts with BO, PI or ASST roles or they can add these roles to existing account
  - Seek out these individuals for assistance with your account set-up
- Trainees without eRA Commons accounts currently are registered as part of xTrain actions

**Future Enhancement:**

- Trainee account set-up by SOs, AOs & AAs
- Improvements to general account administration

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# Accessing eRA Commons

In your Web browser go to:

<https://commons.era.nih.gov/commons/>

Enter Commons Username and Password and Click Login

Electronic Research Administration  
**eRA Commons**  
Sponsored by National Institutes of Health

Welcome Guest  
Institution: Not Affiliated  
Authority:  
Version 2.15.1.2

Home Links eRA Partners Help

**What's NEW on the COMMONS**

**COMMONS USER ALERT** : February 8, 2008. The eRA system is back up and running. If you have questions or issues, please contact the eRA Commons Help Desk:

**Support Tip:** We encourage you to take advantage of our new web support at <http://ithelpdesk.nih.gov/eRA/>. When requesting support please supply as much of the requested data as possible for faster service.

**Electronic Submission Tip:** Learn about the most frequent application errors at [Avoiding Common Errors](#).

More Recent Features of Commons include:

**Commons Login**

\* indicates required field.

Username \*

Password \*

Login Reset Forgot Password?

System Notification

**About the Commons**

- Scope and Purpose
- Frequently Asked Questions
- Grantee Organization Registration
- eRA Contacts
- Enter eRA NIH Commons Demo

**Links**

- Commons Support Page
- CRISP
- eRA Home Page
- Electronic Application Submission
- Grants.gov
- Edison
- Loan Repayment Program
- National Institutes of Health
- Public Access Policy Page

◆ **NEW** xTrain has been released in a pilot mode for a limited pool of institutions. If you are not a participant in the xTrain pilot please do not enter the xTrain system. This functionality will be released to full production mid-2008. For more information please contact the eRA Helpdesk.

◆ **eSNAP** - Allows an institution to review non-competing grant data and submit a progress report online.

◆ **Reference Letters**: To submit a reference letter when requested by an applicant, please follow this link: [Submit Reference Letter](#)

◆ **Internet Assisted Review (IAR)** - Allows reviewer to submit critiques and preliminary scores for applications they are reviewing. Allows Reviewers, SFRAs, and GTAs to view all critiques in preparation for a meeting. IAR creates a preliminary summary statement body containing submitted critiques for the SFRAs or GTAs.

◆ **Demo Facility** - [Demo Facility](#) allows you to try most of the capabilities of the NIH eRA Commons in a sample environment.

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# Electronic Research Administration

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## Using xTrain



## What is the first thing most Program Directors will want to do?



Delegate the ability to perform their xTrain actions to someone else!

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- A PD/PI can delegate to an assistant the authority to perform all xTrain-related functions on their behalf **except for the authority to submit Appointments to the Agency**

- eRA Commons allows PD/PIs to delegate several types of authority (e.g., PI, PPF Edit, Status, xTrain). Currently, each type of authority must be delegated separately.

**Future Enhancement:**  
Single interface for all PI Delegations

- Quick Reference

- [http://era.nih.gov/files/PI\\_delegation\\_xtrain\\_authority.pdf](http://era.nih.gov/files/PI_delegation_xtrain_authority.pdf)

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# Delegate xTrain Authority

## Assign Delegation

1. PD/PI logs into eRA Commons at <https://commons.era.nih.gov/commons/>
2. PD/PI selects the **Admin** tab in the blue navigation bar across the top of the screen then selects the **Accounts** and **Delegate xTrain Authority** sub menus
3. PD/PI selects the user to receive delegation from the list of **Current Institution Users** and clicks the **Assign** button

Commons Login

\* indicates required field

Username \*

Password \*

Login Reset

Only eRA Commons users with the ASST role will appear in list

Electronic Research Administration

Welcome chermoney  
Institution: EXT UAT  
DEMO CORP.  
Authority: PI Log-out

Version 2.13.3.1

Home Admin Institution Profile Personal Profile Status eSIP xTrain Links eRA Partners Help

Accounts

Delegate PI Delegate PPI Edit Delegate Status Change Password Verify NIH Support Delegate xTrain Authority

Delegate xTrain Authority

You are delegating xTrain Authority for: CHERDMONEY

Current Institution Users	Current xTrain Delegates
O'REILLY, RADAR	No xTrain Delegates Found

Assign ==>

Cancel

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# Hands-on: Delegation

## Access eRA Commons

1. Open an Internet connection and go to the eRA Commons non-production environment:
  - External User Acceptance Test (Ext-UAT)
  - <https://commons.uat.era.nih.gov/commons/>
2. Enter the PI Username and password provided by your trainer
  - eRA Commons is not case sensitive

## Assign Delegation

- **Delegate xTrain Authority** to the ASST user provided by your trainer
- Select another ASST user from the list and **Delegate xTrain Authority** to that user as well

## Revoke Delegation

- **Revoke xTrain Authority** from the second ASST user
  - Your assigned assistant should remain delegated

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# Using xTrain – PD/PI

- PI users are brought to the **My Grants** screen when the **xTrain** Tab is selected
  - List of all grants for which you are the PI

Number	Project Start Date	Project End Date	Program Director	Project Title	Action
T32 GM 008715	07/01/1999	06/30/2010	Money, Cher D	TRAINING PROGRAM IN CELL/MATRIX BIOTECHNOLOGY	<a href="#">View Trainee Roster</a>
T32 DK 061298	04/01/2002	03/31/2009	Money, Cher D	MOLECULAR MECHANISMS & NOVEL THERAPIES OF NEPHRON INJURY	<a href="#">View Trainee Roster</a>
T32 DK 065517	07/01/2004	06/30/2009	Money, Cher D	RESEARCH TRAINING IN PEDIATRIC NEPHROLOGY	<a href="#">View Trainee Roster</a>

The grant **Number** links to the **Grant Summary** page.

The **View Trainee Roster** link will bring you to the page from which you will perform xTrain actions.



# Grant Summary

Number	Project Start Date	Project End Date	Program Director	Project Title	Action
T32 GM 008715	07/01/1999	06/30/2010	Money, Cher D	TRAINING PROGRAM IN CELL/MATRIX BIOTECHNOLOGY	<a href="#">View Trainee Roster</a>
T32 DK 061298	04/01/2002	03/31/2009	Money, Cher D	MOLECULAR MECHANISMS & NOVEL THERAPIES OF NEPHRON INJURY	<a href="#">View Trainee Roster</a>
T32 DK 065517	07/01/2004	06/30/2009	Money, Cher D	RESEARCH TRAINING IN PEDIATRIC NEPHROLOGY	<a href="#">View Trainee Roster</a>

Numbers displayed reflect paper/electronic actions accepted by NIH **AND** entered in eRA database. Data entry for paper actions still in progress.

From the **xTrain** tab, click on the Grant Number link to access the **Grant Summary** page.

Grant Number	Budget Start Date	Budget End Date	FY	Program Director	Short Term		Pre Docs		Post Docs	
					Hms Slots	Hms Accepted	Hms Slots	Hms Accepted	Hms Slots	Hms Accepted
1T32GM008715-01A1	07/01/2000	06/30/2001	2000	Money, Cher D	0	0	5	4	0	0
2T32GM008715-08	07/01/2005	06/30/2006	2005	Money, Cher D	0	0	10	8	0	0
3T32GM008715-02S1	07/01/2001	06/30/2002	2001	Money, Cher D	0	0	0	1	0	0
4T32GM008715-05S1	07/01/2004	06/30/2005	2004	Money, Cher D	0	0	0	1	0	0
5T32GM008715-08S1	07/01/2005	06/30/2006	2005	LAURIE GORDON W	0	0	0	1	0	0
6T32GM008715-02	07/01/2001	06/30/2002	2001	Money, Cher D	0	0	7	7	0	0
7T32GM008715-03	07/01/2002	06/30/2003	2002	Money, Cher D	0	0	8	16	0	0
8T32GM008715-04	07/01/2003	06/30/2004	2003	Money, Cher D	0	0	8	16	0	0
9T32GM008715-05	07/01/2004	06/30/2005	2004	Money, Cher D	0	0	8	16	0	0
10T32GM008715-07	07/01/2006	06/30/2007	2006	Money, Cher D	0	0	10	18	0	0
11T32GM008715-08	07/01/2007	06/01/2007	2007	Money, Cher D	0	0	6	16	0	0
12T32GM008715-09	07/01/2008	06/30/2009	2008	Money, Cher D	0	0	0	18	0	0

# Trainee Roster



Welcome cherdmoney  
Institution: FLORIDA STATE UNIVERSITY  
Authority: PI

**My Grants**

Number	Project Start Date	Project End Date	Program Director	Project Title	Action
<a href="#">T32 GM 008715</a>	07/01/1999	06/30/2010	Money, Cher D	TRAINING PROGRAM IN CELL/MATRIX BIOTECHNOLOGY	<a href="#">View Trainee Roster</a>
<a href="#">T32 DK 061298</a>	04/01/2002	03/31/2009	Money, Cher D	MOLECULAR MECHANISMS & NOVEL	<a href="#">View Trainee Roster</a>
<a href="#">T32 DK 065517</a>	07/01/2004	06/30/2009			

**Click on [View Trainee Roster](#) link.**

**Trainee Roster**

Project: T32 GM 008715  
Project Title: TRAINING PROGRAM IN CELL/MATRIX BIOTECHNOLOGY  
Project Start End Dates: 07/01/1999 - 06/30/2010

All Years

Application	Appointment	FY	Appointment	Termination	End	Degree	Appointment	Appointment	Termination	Termination	View	Action
Trainee Name	Type		Start Date	Date	Date Past?	Level	Status	Source	Status	Source		
5T32GM008715-09 (Budget Period: 07/01/2008-06/30/2009) <a href="#">Create New Appointment</a>												
Bailey, Aaron O	Reappointment	2008	07/01/2007	06/30/2008	No	PRE-DOC	In-Progress	Electronic			<a href="#">View 2271</a>	<a href="#">Process 2271</a>
Bailey, Aaron O.	Amendment	2008	07/01/2007	02/01/2008	Yes	PRE-DOC	In-Progress	Electronic			<a href="#">View 2271</a>	<a href="#">Process 2271</a>
5T32GM008715-08 (Budget Period: 07/01/2007-06/30/2008) <a href="#">Create New Appointment</a>												
Bailey, Aaron O.		2007	07/01/2007	06/30/2008	No	PRE-DOC	Accepted	Paper			<a href="#">View 2271</a>	<a href="#">Amend 2271</a> <a href="#">Initiate TN</a>

**Choose All Years and click Go.**

**Coming Soon:**  
Fix to default search issue.  
For now, you must select "All Years."

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# Trainee Roster

**Appointment/Termination Source: Paper or Electronic**

Application	Appointment	FY	Appointment	Termination	End	Degree	Appointment	Appointment	Termination	Termination	View	Action
Trainee Name	Type		Start Date	Date	Date Past?	Level	Status	Source	Status	Source		
5T32DK065517-04 (Budget Period: 07/01/2007-06/30/2008) <a href="#">Create New Appointment</a>												
Gibb, Scarlett K.	New	2007	07/01/2007	06/30/2008	No	PRE-DOC	Accepted	Electronic			<a href="#">View 2271</a>	<a href="#">Amend 2271</a> <a href="#">Initiate TN</a>
Money, Cher D	New	2007	07/01/2007	06/30/2008	06/30/2008	PRE-DOC	Accepted	Paper	Pending Agency Review	Electronic	<a href="#">View 2271</a> <a href="#">View TN</a>	<a href="#">Amend 2271</a> <a href="#">Initiate TN</a>
Test Trainee s, x	New	2007	07/01/2007	06/01/2008	No	PRE-DOC	In-Progress	Electronic			<a href="#">View 2271</a>	<a href="#">Process 2271</a>
Test Trainee s, x	New	2007	07/01/2007	01/01/2008	Yes	PRE-BAC	Accepted	Electronic			<a href="#">View 2271</a>	<a href="#">Amend 2271</a> <a href="#">Initiate TN</a>
Test Trainee s, x	New	2007	07/01/2007	06/01/2008	No	PRE-DOC	Pending Agency Review	Electronic			<a href="#">View 2271</a>	

**Appointment Type:**  
New  
Re-appointment  
Amendment

**Appointment Status:**  
In Progress PI  
In Progress Trainee  
Pending Agency Review  
Accepted  
Terminated

**Termination Status:**  
In Progress BO  
In Progress PI  
In Progress Trainee  
Pending Agency Review  
Accepted

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# Using xTrain - ASST

- PD/PI Delegates (ASSTs) are brought to the **My Grants** screen when the **xTrain** Tab is selected

Number	Project Start Date	Project End Date	Program Director	Project Title	Action
<a href="#">T32 GM 008715</a>	07/01/1999	06/30/2010	Money, Cher D	TRAINING PROGRAM IN CELL/MATRIX BIOTECHNOLOGY	<a href="#">View Trainee Roster</a>
<a href="#">T32 DK 081288</a>	04/01/2002	03/31/2009	Money, Cher D	MOLECULAR MECHANISMS & NOVEL THERAPIES OF NEPHRON INJURY	<a href="#">View Trainee Roster</a>
<a href="#">T32 MH 812008</a>	07/01/2002	06/30/2008	Money, Cher D	XTRAIN DEMO TRAINING GRANT	<a href="#">View Trainee Roster</a>
<a href="#">T32 DK 084517</a>	07/01/2004	06/30/2009	Money, Cher D	RESEARCH TRAINING IN PEDIATRIC NEPHROLOGY	<a href="#">View Trainee Roster</a>

If multiple PD/PIs have Delegated xTrain Authority to the same ASST, the ASST must select a specific PD/PI and click Select Profile.



# Hands-on: Summary & Roster

**\*\* Hands-on exercise from PI perspective. \*\***

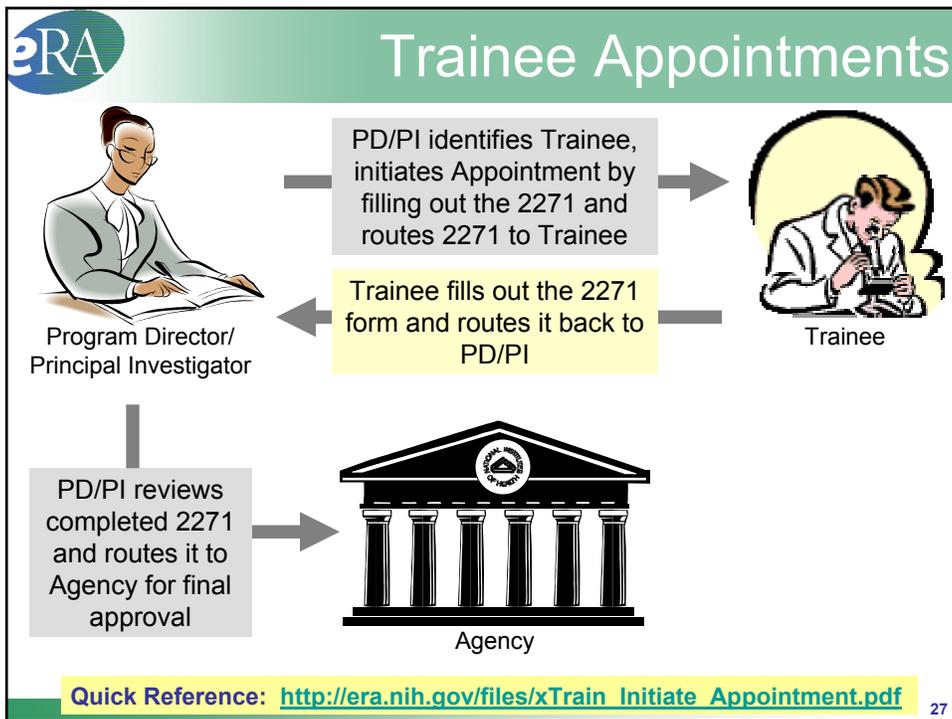
## Grant Summary

1. Once in eRA Commons, select the **xTrain** tab in the blue navigation bar across the top of the screen. You will be brought to the **My Grants** page.
2. Select a **Grant Number** and follow the link to the **Grant Summary** page.

## Trainee Roster

1. Select the **xTrain** tab in the blue navigation bar across the top of the screen. You will be brought back to the **My Grants** page.
2. Select a **View Trainee Roster** and follow the link to the **Trainee Roster** page.

**\*\* If time permits, repeat the exercise from the ASST perspective. \*\***



# eRA PD/PI Create New Appointment

For now, let's assume the Trainee has an eRA Commons account...

PI Trainee Roster screen

Application	Appointment	FY	Appointment		Termination	End	Degree	Appointment	Appointment	Termination	Termination	View	Action
Trainee Name	Type		Start Date	End Date	Date	Date	Level	Status	Source	Status	Source		
5132DK065517-04 (Budget Period: 07/01/2007-06/30/2008) <a href="#">Create New Appointment</a>													
Gibb, Scarlett K.	New	2007	07/01/2007	06/30/2008		No	PRE-DOC	Accepted	Electronic			<a href="#">View 2271</a>	<a href="#">Amend 2271</a> <a href="#">Initiate TN</a>
Money, Cher D		2007	07/01/2007	06/30/2008	06/30/2008	No	PRE-DOC	Accepted	Paper	Pending Agency Review	Electronic	<a href="#">View 2271</a> <a href="#">View TN</a>	<a href="#">Amend 2271</a>
Test Trainee s, x	New	2007	07/01/2007	06/01/2008		No	PRE-DOC	In-Progress PI	Electronic			<a href="#">View 2271</a>	<a href="#">Process 2271</a>

Home Admin Institution Profile Personal Profile Status eSNAP xTrain Links eRA Partners Help

My Grants

## Enter Trainee Commons User ID

In order to proceed with this operation, you must enter the Commons User ID for the Trainee associated with the grant.

\* Trainee User ID:  
KimBeaker

[Identify Trainee](#)

[Continue](#) [Cancel](#)

Provide the Commons Username for the trainee and click Continue.

**eRA PD/PI** Create New Appointment

---

Home Admin Institution Profile Personal Profile Status eSNAP xTrain Links eRA Partners Help

**My Grants**

### Statement of Training Appointment

**Project Number:** T32 DK 065517  
**Appointment Status:**  
**Project Title:** RESEARCH TRAINING IN PEDIATRIC NEPHROLOGY  
**Institution:** EXT UAT DEMO CORP.  
**PD Name:** Money, Cher D

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PHS 2271 OMB No. 0925-0001  
 \* indicates required field

**Trainee Personal Information**  
 For every research training appointment or re-appointment, trainees should review and update their personal information by using the Personal Profile link at the top of this page. Except for the e-mail address, personal information may only be entered or modified by the trainee.

**Last Name, First Name, MI:** Beaker, Kim Estry

**Address Line 1:** 123 My Street  
**Address Line 2:**  
**Address Line 3:**  
**Address Line 4:**

**City, State, ZIP:** My City, VA, 20882  
**Country:** UNITED STATES

**\* Email:** nihelectronicsubmiss@  
**Phone:** 555-111-2222  
**Fax:**

Degree(s)	Earned	In Progress	Completion Date	Major	Minor	Degree Completed?
BSN			05/1988	/		Y

\* screen continues on next slide \*

The 2271 form is opened and pre-populated with information pulled from the Trainee profile.

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**eRA PD/PI** Create New Appointment

\* screen continued from previous slide \*

From Trainee Profile or Trainee Supplied PD/PI Supplied

**Name of Specialty Boards (if applicable)**  
 Nursing: Pediatric Nurse Practitioner

**Is the Trainee in a dual-degree program (e.g. M.D.,Ph.D.)?**  
 No  Yes

**Prior NRSA Support**  
 If the trainee has previously received support from Kirschstein-NRSA training grant or fellowship, it will be listed in the table below. If the list of prior support is incomplete or incorrect, please click the NIH Support Menu tab above and follow the instructions for verifying NIH support.

Grant #	PI	Appointment Start Date	Appointment End Date	Stipend Amt	Degree Level	Status

**Field of Research Training or Career Development (for this appointment)**  
 Choose a specific subfield (e.g., biological chemistry) unless the broader category (e.g., biochemistry) fits best.  
 —Complementary and Alternative Medicine (6580)

**Period of Appointment**

\* From (MM/DD/YYYY) 07/01/2007  
 \* To (MM/DD/YYYY) 06/30/2008  
 12 months 0 days **Re-calculate** Please "Re-calculate" if calendar boxes were used to select dates.

**Support for Period of Appointment**

Type	Total for this Grant (Omit cents)
* Stipend Level	PRE - 20,772 PRE-DOC
* Stipend	20772
* Tuition/fees (estimated)	12000
* Travel	2500
<b>Total</b>	<b>35272</b>

**Save** **Cancel** Appointment can be Saved at any time.

Period can not exceed 12 months and the start date must fall within the budget period.

Must Re-calculate if calendar box is used.

Select level appropriate to Trainee degree and experience.

Stipend must be entered and non-zero.

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# eRA PD/PI Create New Appointment

Home Admin Institution Profile Personal Profile Status eSNAP **xTrain** Links eRA Partners Help

**Appointment Initiation Confirmation**

The Trainee Appointment Form was initiated successfully and is currently assigned to you. To further process this form (to modify data, Route to Trainee, or to Submit to Agency) click Process 2271 link within the list of appointments screen, navigate to the bottom of the form and click appropriate action button.

**Done**

A confirmation message appears.

---

Home Admin Institution Profile Personal Profile Status eSNAP **xTrain** Links eRA Partners Help

**Trainee Roster**

Project: T32 DK 065517  
 Project Title: RESEARCH TRAINING IN PEDIATRIC NEPHROLOGY  
 Project Start/End Dates: 07/01/2004 - 06/30/2009

All Years

Status is set to **In-Progress PI**.

Application	Appointment Type	FY	Appointment Start Date	Appointment End Date	Termination Date	End Date Past?	Degree Level	Appointment Status	Appointment Source	Termination Status	Termination Source	View	Action
5T32DK065517-04 (Budget Period: 07/01/2007-06/30/2008)	New	2007	07/01/2007	06/30/2008		No	PRE-DOC	<b>In-Progress PI</b>	Electronic			<a href="#">View 2271</a>	<a href="#">Process 2271</a>
	New	2007	07/01/2007	06/30/2008		No	PRE-					<a href="#">View 2271</a>	<a href="#">Amend 2271</a> <a href="#">Initiate TN</a>

Use the **Process 2271** link to access **Route to Trainee** button.

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# eRA PD/PI Process 2271

Electronic Research Administration

Welcome cherdmoney  
 Institution: EXT UAT DEMO CORP  
 Authority: PI

**Top of form...**

Personal Profile Status eSNAP **xTrain** Links eRA Partners Help

**Statement of Training Appointment**

Project Number: T32 DK 065517  
 Appointment Status: In-Progress PI [View Routing History](#)

**Bottom of form...**

PHS 2271 \*Indicates Trainee Pe For every r of this pag

Period of Appointment

\* From (MM/DD/YYYY) 07/01/2007

\* To (MM/DD/YYYY) 06/30/2008

12 months 0 days  Please "Re-calculate" if calendar boxes were used to select dates.

Support for Period of Appointment

Type Total for this Grant (Omit cents)

\* Stipend Level PRE - 20,772 PRE-DOC

\* Stipend 20772

\* Tuition/fees (estimated) 12000

\* Travel 2500

Total 35272

Additional action buttons now appear at the bottom of the 2271 form.

**Route to Trainee**

Click the **Route to Trainee** button.

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Home Admin Institution Profile Personal Profile Status eSNAP **xTrain** Links eRA Partners Help

My Grants

### Provide Comments

You would like to send comments by e-mail to the next recipient of this form, please insert them below.

Comments:

Please complete the Trainee appointment form and send it back to me.  
We look forward to your joining our program.

Dr. Cher D. Money  
555-123-4567

Comments (up to 2000 characters) will be included in email message sent to Trainee. Click **Continue** button.

Home Admin Institution Profile Personal Profile Status eSNAP **xTrain** Links eRA Partners Help

My Grants

### Route to Trainee Confirmation

The Appointment Form was successfully routed and Email about this action was sent to Trainee.

Status is set to **In-Progress Trainee**.

PI Trainee Roster screen

Application	Appointment	FY	Appointment		Termination	End	Degree	Appointment	Appointment	Termination	Termination	View	Action
Trainee Name	Type		Start Date	End Date	Date	Date	Level	Status	Source	Status	Source		
5T32DK065517-04 (Budget Period: 07/01/2007-06/30/2008) <a href="#">Create New Appointment</a>													
Beaker, Kim Esty	New	2007	07/01/2007	06/30/2008		No	PRE DOC	<b>In-Progress Trainee</b>	Electronic			<a href="#">View 2271</a>	

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- Let's go back to the beginning of the **Create New Appointment** process and look at the steps you will take to initiate an Appointment for a Trainee without an eRA Commons account.

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# Identify Trainee



Home Admin Institution Profile Personal Profile Status eSNAP **xTrain** Links eRA Partners Help

My Grants

## Enter Trainee Commons User ID

In order to proceed with this operation, you must enter the Commons User ID for the Trainee associated with the grant.

\* Trainee User ID:

[Identify Trainee](#)

If you don't have the eRA Commons account for the Trainee you must use the **Identify Trainee** link.

### Identify Trainee

Grant: 5 T32 DK 65517-4  
 Project Title: Research Training in Pediatric Nephrology  
 Budget Start/End Dates: 07/01/2004-06/30/2009

Enter search parameters to locate existing Trainee Profile. Search will be performed against all profile records with Training or Fellowship involvement with NIH. If you cannot locate the existing Profile record, upon the execution of the search the button to create a New Trainee Profile will be provided.

If you located a Profile that does not have a Commons User ID, then please request the Profile person to create a Commons User ID by inviting Profile owner to Register. Once registration is completed, you will get email with a User ID of that profile so you can proceed with appointing that Trainee.

* Last Name	First Name	Commons User ID		
Beaker			Search	Clear

Provide search criteria and click **Search**.

**Tip:** Wild-card character (%) is allowed after the first 3 letters of the Last Name.

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# Create New Trainee Profile



Home Admin Institution Profile Personal Profile Status eSNAP **xTrain** Links eRA Partners Help

My Grants

* Last Name	First Name	Commons User ID		
Beaker			Search	Clear

Name  Institution  Email  Address  Commons User ID

No records returned. Refine the search and try again.

If no records are found, you can refine the search and try again.

### Create New Trainee Profile

Upon clicking the Submit button, the email with invitation to register for Commons User ID is going to be sent to the Trainee.

Once Trainee completes the Registration process to create Commons User ID and NIH activates the Trainee account, you will be emailed the Commons User ID of the trainee so you can initiate the Trainee appointment.

\* Required

* Last Name	* First Name	Middle Name	* Email Address
Beaker	Kim		KimBeaker@demo.com

If unable to find a match, select **Create New Trainee Profile**.

Provide required info and **Submit**.

A confirmation screen will appear. Trainee is sent an email with link to register in Commons. The PI is sent an email with the Commons Username to use for the Appointment once the account is established.

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# New Trainee Profile

**Trainee receives email with link to register and is directed to complete the presented form and to verify the support identified as a potential match to the Trainee.**

**Verify NIH Support for Kim Beaker**

We do not show any awarded NIH Support or Committee Involvement for Kim Beaker. This may be appropriate. Either select Add Additional NIH support, Reject Account Request, or Complete Account Request to continue.

Comments for NIH  
This is correct. I have never had an eRA Commons account or been involved on a previous grant.

**Continue Account Request**   **Reject Account Request**   **Add NIH Support**

**Complete Account Request**

Comments on NIH  
This is correct. I have never had an eRA Commons account or been involved on a previous grant.

By selecting **Complete Account Request**, NIH will verify your information and then activate your account. Generally, this takes two to five business days. You will be notified by email when the process is complete.

**Complete Account Request**   **Back**

**After this step it will take 2-5 days for the account to be activated.**

# Trainee Profile

- Once a Trainee account is created, the Trainee must log into eRA Commons and access each of the Personal Profile pages to provide the information used to populate xTrain-related forms.

Electronic Research Administration  
**eRA Commons**  
Sponsored by National Institutes of Health

Welcome kimbeaker  
Institution: UNIVERSITY OF VIRGINIA  
CHARLOTTESVILLE  
Authority: TRAINEE   [Log-out](#)

Version 2.15.1.2  
Home Admin **Personal Profile** xTrain Links eRA Partners Help

Personal Information Race/Ethnicity Employments Reviewer Address Residential Address Degrees Publications Trainee-Specific

**Personal Profile**

**Personal Information**   **Race/Ethnicity**   **Residential Address**   **Degrees**   **Trainee-Specific**



## Trainee Profile

- xTrain will check the Trainee's Profile during the Appointment and Termination process and will generate Errors/Warnings if expected information is not available or violates xTrain business rules.
  - Not all fields that are checked are marked as required on the profile screens.
    - Personal Profile is used by multiple eRA services and some fields are required only in specific circumstances.

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## Profile – Personal Info

Home Admin Personal Profile Personal Information Research Degrees Public

**Personal Information**

Indicates required field

**Identifying Information**

Name Prefix:

Middle Name:  **Middle Name is not required, but we recommend including it (especially for common names).**

Name Suffix:

Gender:

Citizenship:  **Citizenship is a required field for xTrain. Trainees must be a citizen or noncitizen national of the US or have been lawfully admitted for permanent residence.**

eRA Email:  **Email is used for notifications that xTrain actions have taken place. Also, used for "Forgot Password" function.**

First Name:  **SSN requested. If not provided, may get a Warning indicating that this information is helpful in accurate identification of an individual.**

Last Name:

SSN:

DOB (MM/DD/YYYY):  Do Not Wish to Provide?

Disabilities (select all that apply)

<input type="checkbox"/> Hearing	<input type="checkbox"/> Vision
<input type="checkbox"/> Missing Extremities	<input type="checkbox"/> Nonparalytic Orthopedic
<input type="checkbox"/> Partial Paralysis	<input type="checkbox"/> Complete paralysis
<input type="checkbox"/> Speech	<input type="checkbox"/> Motor (temp code)
<input type="checkbox"/> Other	

Submit Reset Cancel

**Coming Soon: Disability categories to match new 2271 & Grants.gov standard forms.**

Select all that apply.

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- Information is used for aggregate reporting only.

**Race/Ethnicity** ⓘ

Content Management Test

\* indicates required field

---

**Current Information**

Race(s): White ;

Ethnicity: Non-Hispanic

---

**New Information**

Ethnicity: \*  
Required if multiple races are selected

Non-Hispanic ▼

American Indian or Alaska Native

Asian

Black or African American

White

Native Hawaiian or Pacific Islander

Do Not Wish to Provide

Race(s): \*  
(Check all that apply)

Submit Reset Cancel

Race and Ethnicity or "Do Not Wish to Provide" must be selected before an Appointment can be submitted.

- Trainee should provide permanent address (i.e., where trainee can be reached after the completion of the program)

**Residential Address** ⓘ

\* indicates required field

---

**Residential Address**

Line 1: \* 123 My Home Road City: \* My City

Line 2: State: \* MARYLAND ▼

Line 3: Zip Code: \* 12345

Line 4: Country: \* UNITED STATES ▼

Phone: \* 555-123-4567 Fax:

E-mail: \* cummins@mail.nih.gov

Submit Reset Cancel



Trainee

## Profile - Degrees

- xTrain checks Degree information as part of the Appointment process
  - PRE-DOC: must have a Bachelor's Degree or equivalent
  - POST-DOC: must have a PhD, MD or equivalent
- Remember to provide information on degrees in progress and the expected completion date

**List of Degrees** ⓘ

Degrees 1 - 2 out of 2 records

Degree	Institution	Completion Date	Degree Completed?	Major	Action
BS: BACHELOR OF SCIENCE	HHS University	05/1997	Y		<a href="#">Edit</a> <a href="#">Delete</a>
MD: DOCTOR OF MEDICINE	Get Smart University	01/1998	Y		<a href="#">Edit</a> <a href="#">Delete</a>

Use **Add New Degree** button to provide additional degree information.

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Trainee

## Profile – Trainee-Specific

- Information used exclusively for Training grant actions.

**Trainee-Specific Information** ⓘ

\* indicates required field

**Statement of non-delinquency on U.S. Federal Debt**

\* Are you delinquent on the repayment of any U.S. Federal Debt(s)? (If yes, explain in a textbox below)

No  Yes

If you answer Yes, you must provide an explanation or your Trainee action will not be pass the validation check prior to submission.

**Disadvantaged background**

\* Are you from a disadvantaged background?

No

An Error is generated during the Appointment process if **Yes** is checked and no explanation is provided.

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# Disadvantaged Background

Individuals from disadvantaged backgrounds are defined as:

1. Individuals who come from a family with an annual income below established low-income thresholds. These thresholds are based on family size, published by the U.S. Bureau of the Census; adjusted annually for changes in the Consumer Price Index; and adjusted by the Secretary for use in all health professions programs. The Secretary periodically publishes these income levels at <http://aspe.hhs.gov/poverty/index.shtml>. For individuals from low income backgrounds, the institution must be able to demonstrate that such candidates have qualified for Federal disadvantaged assistance or they have received any of the following student loans: Health Professional Student Loans (HPSL), Loans for Disadvantaged Student Program, or they have received scholarships from the U.S. Department of Health and Human Services under the Scholarship for Individuals with Exceptional Financial Need.
2. Individuals who come from a social, cultural, or educational environment such as that found in certain rural or inner-city environments that have demonstrably and recently directly inhibited the individual from obtaining the knowledge, skills, and abilities necessary to develop and participate in a research career. Recruitment and retention plans related to a disadvantaged background are most applicable to high school and perhaps undergraduate candidates, but would be more difficult to justify for individuals beyond that level of achievement.



# Hands-on: Trainee Profile

## Trainee Profile

1. Log into the **Trainee** account provided by your trainer.  
Note: If still logged in from the previous exercise, you may need to **Log-out** of that session using the link in the upper, right-hand corner of the screen.
2. Select the **Personal Profile** tab in the blue navigation bar across the top of the screen.
3. Select each of the profile areas used with xTrain. Enter/update the information required by xTrain.  
Remember, not all of the fields required by xTrain will be marked required in the profile.

**\*\* We'll see how well you did in a later exercise. \*\***

The screenshot shows the eRA Commons interface. At the top, it says "Electronic Research Administration" and "eRA Commons Sponsored by National Institutes of Health". On the right, it displays user information: "Welcome kimbeaker", "Institution: UNIVERSITY OF VIRGINIA CHARLOTTESVILLE", and "Authority: TRAINEE" with a "Log-out" link. Below this is a navigation bar with tabs: "Home", "Admin", "Personal Profile", "xTrain", "Links", "eRA Partners", and "Help". Under "Personal Profile", there are sub-tabs: "Personal Information", "Race/Ethnicity", "Residential Address", "Degrees", "Publications", and "Trainee-Specific". Below the sub-tabs, five yellow boxes with red arrows point to them: "Personal Information", "Race/Ethnicity", "Residential Address", "Degrees", and "Trainee-Specific".

**eRA Trainee** New Appointment

*Now back to that New Appointment from the Trainee perspective...*

- Trainee users are brought to the **Trainee Appointments and Terminations** screen when the **xTrain** tab is selected

---

Electronic Research Administration  
**eRA Commons**  
 Sponsored by National Institutes of Health

Welcome kimbeaker  
 Institution: UNIVERSITY OF VIRGINIA  
 CHARLOTTESVILLE  
 Version Authority: TRAINEE Log-out

2.15.1.2  
 Home Admin Personal Profile **xTrain** Links eRA Partners Help

My Appointments and Terminations

### Trainee Appointments and Terminations

1 - 1 of 1

Grant Number	Appointment Start Date	Appointment End Date	Termination Date	Program Director	Institution	Degree Level	Appointment Status	Termination Status	View	Action
5T3ZDK065517-04	2007-07-01	2008-06-30		Money, Cher D	EXT UAT DEMO CORP.	PRE-DOC	In-Progress Trainee		<a href="#">View 2271</a>	<a href="#">Process 2271</a>

Click the **Process 2271** to access the Appointment form.

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**eRA Trainee** New Appointment

My Appointments and Terminations

### Statement of Training Appointment

Project Number: T32 DK 065517  
 Appointment Status: In-Progress Trainee [View Routing History](#)  
 Project Title: RESEARCH TRAINING IN PEDIATRIC NEPHROLOGY  
 Institution: EXT UAT DEMO CORP.  
 PD Name: Money, Cher D

The 2271 form is opened and pre-populated with information pulled from the Trainee profile or previously entered in form.

PHS 2271 OMB No. 0925-0001  
 \* indicates required field

**Trainee Personal Information**  
 For every research training appointment or re-appointment, trainees should review and update their personal information by using the Personal Profile link at the top of this page. Except for the e-mail address, personal information may only be entered or modified by the trainee.

Last Name, First Name, MI: Beaker, Kim Estry  
 SSN: SSN – pulled from Profile/Personal Info

Address Line 1: 123 My Street  
 Address Line 2:  
 Address Line 3:  
 Address Line 4: Address – pulled from Profile/Residential Address

City, State, ZIP: My City, VA, 20882  
 Country: UNITED STATES

\* Email: nihelectronicssubmiss@ Email – pulled from Profile/Personal Info  
 Phone: 555-111-2222  
 Fax:

Degree(s) Earned In Progress Completion Date Major Minor Degree Completed?  
 BSN 05/1988 J Y Degrees – pulled from Profile/Degrees

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**eRA Trainee** **New Appointment**

\* screen continued from previous slide \*

Name of Specialty Boards (if applicable)  
Nursing; Pediatric Nurse Practitioner Select from pull-down list.

Is the Trainee in a dual-degree program (e.g. M.D./Ph.D.)?  
 No  Yes Select appropriate radio button.

**Prior NRSA Support**  
 If the trainee has previously received support from Kirschstein-NRSA training grant or fellowship, it will be listed in the table below. If the list of prior support is incomplete or incorrect, please click the NIH Support Menu tab above and follow the instructions for verifying NIH support.

Grant #	PI	Appointment Start Date	Appointment End Date	Stipend Amt	Degree Level	Status

Field of Research Training or Career Development (for this appointment)  
 Choose a specific subfield (e.g., biological chemistry) unless the broader category (e.g., biochemistry).  
 —Complementary and Alternative Medicine (6580)

Period of Appointment  
 \* From (MM/DD/YYYY) 07/01/2007  
 \* To (MM/DD/YYYY) 06/30/2008  
 12 months 0 days Re-calculate  
 were used to select dates.

**Support for Period of Appointment**

Type	Total for this Grant (Omit cents)
* Stipend Level	PRE - 20,772 PRE-DOC
* Stipend	20772
* Tuitionfees (estimated)	12000
* Travel	2500
<b>Total</b>	<b>35272</b>

**Prior NRSA Support - pulled from profile. To correct, go to Admin/ Account/Verify NIH Support and add grant number.**

**Trainee can click Save and complete the form later. Once complete, click Route to PI to continue the Appointment process. Note: Route to PI has implicit Save.**

From Trainee Profile or Trainee Supplied PD/PI Supplied

Review remaining info and contact PD/PI with any concerns.

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**eRA Trainee** **New Appointment**

- When the Trainee clicks the **Route to PI** button, the system will validate the information contained in the 2271 form and will flag any Errors or Warnings found.
  - Errors must be corrected before the Appointment is routed. Warnings are corrected at your discretion.

**Appointment Validation Warnings**

**Error Message**

Appointment validation warnings:  
 - No SSN has been entered in the Trainee personal profile. Trainees are asked to voluntarily provide SSN information to aid in the processing of Trainee appointments by providing the agency with vital information necessary for accurate identification. (ID: 200015)

You have appointment validation warnings. Do you want to continue?

Click **Continue** to proceed. To correct the Warnings, click **Cancel**, correct the item and click **Route to PI** again.

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# eRA Trainee New Appointment

**Provide Comments**

If you would like to send comments by e-mail to the next recipient of this form, please insert them below.

**Comments:**  
I have completed the form. Please let me know if you require any additional information.

Kim Beaker

**Continue** **Cancel**

**Route to PI Confirmation**

I certify that the statements herein are true and complete to the best of my knowledge and that I will comply with all applicable Public Health Service terms and conditions governing my appointment. I am aware that any false, fictitious or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties.

**I Accept** **Cancel**

The 2271 Form was successfully routed and Email about this action was sent to PI.

**Done**

**Electronic Signature recorded.**

**Trainee Appointments and Terminations screen**

Grant Number	Appointment Start Date	Appointment End Date	Termination Date	Program Director	Institution	Degree Level	Appointment Status	Termination Status	View	Action
5T32DK065517-04	2007-07-01	2008-06-30		Money, Cher D	EXT UAT DEMO CORP.	PRE-DOC	In-Progress PI		<a href="#">View 2271</a>	

**Status is set to In-Progress PI.**

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# eRA PD/PI New Appointment

- To complete the Appointment, the PD/PI must review the 2271 form one last time and then **Submit to Agency**.

**PI Trainee Roster screen**

Application	Trainee Name	Appointment Type	FY	Appointment Start Date	Appointment End Date	Termination Date	End Date Past?	Degree Level	Appointment Status	Appointment Source	Termination Status	Termination Source	View	Action
5T32DK065517-04 (Budget Period: 07/01/2007-06/30/2008)	Beaker, Kim Estry	New	2007	07/01/2007	06/30/2008		No	PRE-DOC	In-Progress PI	Electronic			<a href="#">View 2271</a>	<a href="#">Process 2271</a>

**Bottom of 2271 form**

**Support for Period of Appointment**

**Type** PRE - 20,772 PRE-DOC

\* Stipend Level: PRE - 20,772 PRE-DOC

\* Stipend: 20772

\* Tuition/fees (estimated): 12000

\* Travel: 2500

**Total** 35272

**Click Submit to Agency to complete the Appointment initiation process.**

**Save** **Cancel** **Reset** **Route to Trainee** **Delete** **View PDF** **Submit to Agency**

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**eRA PD/PI New Appointment**

**Provide Comments**  
If you would like to send comments by e-mail to the next recipient of this form, please insert them below.

**Comments:**  
I am submitting Kim Beaker's Appointment form for your approval. Please let me know if you have any questions.

Dr. Cher D. Money  
555-123-4567

**Submit to Agency Certification**  
I certify that this individual is qualified for this program and is eligible to receive financial support for the period specified above. A copy of this appointment form will be given to the individual.

**Submit to Agency Confirmation**  
The appointment was successfully submitted to the Agency, and the Agency's grant specialists will be notified. For predoctoral appointments, no further action is required. For postdoctoral Kirschstein-NRSA research training appointments, an original signature is required on the Appointment Form (2271) and Payback Agreement (6031), and the appointment will not be accepted until the Agency receives the signed forms.

**Electronic Signature recorded.**

**Click Continue button.**

**Comments (up to 2000 characters) will be included in email message sent to Agency.**

**Status is set to Pending Agency Review.**

**PI Trainee Roster screen**

Application	Appointment	FY	Appointment		Termination	End	Degree	Appointment	Appointment	Termination	Termination	View	Action
Trainee Name	Type		Start Date	End Date	Date	Date Past?	Level	Status	Source	Status	Source		
5T32DK065517-04 (Budget Period: 07/01/2007-06/30/2008) <a href="#">Create New Appointment</a>													
Beaker, Kim Esty	New	2007	07/01/2007	06/30/2008		No	PRE-DOC	Pending Agency Review	Electronic				

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**eRA New Appointment**

- For Pre-doc Appointments
  - No further action is needed, unless confirmation of permanent residency status is required
- For Post-doc Appointments Only
  - Mail the following forms with original Trainee signatures to the awarding NIH Institute
    - Appointment (2271) form
    - Payback Agreement (6031) form
    - Confirmation of permanent residency (if needed)

**Tip:** For Post-docs, use links provided at time of submission to print forms to ensure most recent info.

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# Re-Appointment

- An Appointment (2271) form is needed for each budget period for which the Trainee receives support.
- The initial year of support on a specific grant is referred to as a “New” Appointment, subsequent periods are **Re-appointments**.
- Re-appointments follow the same basic flow as an Appointment.

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# Re-Appointment

PI Trainee Roster screen

**Select Re-Appoint 2271**

Brilliant, Shirley	New	2006	07/01/2006	08/30/2007	Yes	POST-DOC	Accepted	Electronic	View 2271 View Payback	Amend 2271 Re-Appoint 2271 Delete 2271
--------------------	-----	------	------------	------------	-----	----------	----------	------------	---------------------------	--

**Bottom of 2271 form**

**Period of Appointment**

\* From (MM/DD/YYYY) 07/01/2007

\* To (MM/DD/YYYY) 06/30/2008

12 months 0 days  Please "Re-calculate" if calendar boxes were used to select dates.

**Support for Period of Appointment**

<b>Type</b>	<b>Total for this Grant (Omit cents)</b>
* Stipend Level	2 - 41,796 POST-DOC
* Stipend	41796
* Tuition/fees (estimated)	8000
* Travel	850
<b>Total</b>	50646

**Appointment Initiation Confirmation**

The Trainee Appointment Form was initiated successfully and is currently assigned to you. To further process this form (to modify data, Route to Trainee, or to Submit to Agency) click Process 2271 link within the list of appointments screen, navigate to the bottom of the form and click appropriate action button.

**Status is set to In-Progress PI.**

Brilliant, Shirley	Reappointment	2007	07/01/2007	06/30/2008	No	POST-DOC	In-Progress PI	Electronic	View 2271 View Payback	Process 2271
--------------------	---------------	------	------------	------------	----	----------	----------------	------------	---------------------------	--------------

**Appointment Type set to Reappointment.**

**A confirmation message appears.**

**Review all info. Don't forget to change Period of Appointment dates.**

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# Re-Appointment

- The rest of the process is the same as the one followed for Appointments.
  - For Post-docs, the **Submit to Agency Confirmation** page includes links to print the 2271 and Payback Agreement forms which must be signed and mailed to the Agency.



**Tip:**  
For Post-docs, use links provided at time of submission to print forms to ensure most recent info.

**Submit to Agency Confirmation**

The appointment was successfully submitted to the Agency, and the Agency's grant specialists will be notified. For predoctoral appointments, no further action is required. For postdoctoral Kirschstein-NRSA research training appointments, an original signature is required on the Appointment Form (2271) and Payback Agreement (6031), and the appointment will not be accepted until the Agency receives the signed forms.

For your convenience, pre-populated Appointment and Payback Agreement forms are provided below. For a postdoctoral appointment, please print the forms, obtain all necessary signatures, and send originals to the designated grants management contact at the Agency.

[Pre-Populated 2271 Form](#)

[Payback Agreement Form](#)

[Done](#)

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# Routing History

- The View Routing History link is available throughout many of the xTrain processes
  - Provides event history including routing comments

**Statement of Training Appointment**

Project Number: T32 DK 065517  
 Appointment Status: In-Progress [View Routing History](#)  
 Project Title: RESEARCH TRAINING IN PEDIATRIC NEPHROLOGY  
 Institution: EXT UAT DEMO CORP.  
 PD Name: Money, Cher D

**Coming Soon:**

- Registration events to be added to history.
- Trainee name added to header.
- BO name added to header for TNs.

**Routing History**

Project Number: T32 DK 65517  
 Appointment Status: In-Progress PI  
 Project Title: RESEARCH TRAINING IN PEDIATRIC NEPHROLOGY  
 Institution: EXT UAT DEMO CORP.  
 PD Name: Money, Cher D

Event	Action Taken By	Action Date	Action Taken	Current Status	Current Reviewer	Action Comments
PI Initiates, Amends, or Re-appoints a Trainee via 2271	O'Reilly, Radar	03/13/2008 09:55 PM	Initiated by PI	In-Progress PI	Money, Cher	
PI Routes 2271 to Trainee	O'Reilly, Radar	03/13/2008 10:14 PM	Routed to Trainee	In-Progress Trainee	Brilliant, Shirley	Please review the form information and route the form back to me.
Trainee Routes 2271 to PI	Brilliant, Shirley	03/13/2008 10:17 PM	Routed to PI	In-Progress PI	Money, Cher	Dr. Money, I have updated the information in the form. Dr. Brilliant

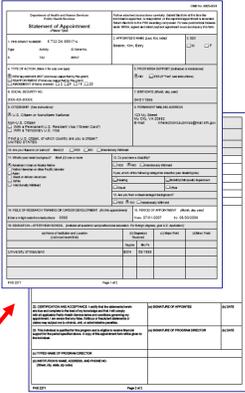
[Close](#)

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 **View 2271**

Application	Appointment	FY	Appointment		Termination	End	Degree	Appointment	Appointment	Termination	Termination	View	Action
Trainee Name	Type		Start Date	End Date	Date	Date	Level	Status	Source	Status	Source		
5T32DK065517-04 (Budget Period: 07/01/2007-06/30/2008) <a href="#">Create New Appointment</a>													
Beaker, Kim Esty	New	2007	07/01/2007	06/30/2008		No	PRE- DOC	In-Progress Trainee	Electronic			<a href="#">View 2271</a>	

- Any xTrain user can use the View 2271 link in their hitlist or the View PDF button at the bottom of the form to look at the current document
  - If not yet submitted to Agency (or if previously submitted on paper), the system creates the view “on the fly,” pulling the most current information from the profile/database and any entered data
  - If already electronically submitted, a “snapshot” of the form at time of submission is displayed
  - Uses most recently OMB-approved form
    - For historical paper submissions, the form may not look identical to the one submitted



[Save](#) [Cancel](#) [Reset](#) [Route to Trainee](#) [Delete](#) [View PDF](#) [Submit to Agency](#)

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 **Hands-on: Appointment**

### Appointment

- From your PI's **Trainee Roster** screen, go to the most recent budget period listed (make note of the budget period dates) and select the **Create New Appointment** link. Supply the Trainee Username provided by your trainer and follow the Appointment process all the way through to **Submit to Agency**.
  - You will need to:
    - Enter PI-supplied information
    - Route to Trainee**
    - Login as Trainee and enter Trainee-supplied information
    - Route to PI**
    - Login as PI, review the form and **Submit to Agency**

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## Hands-on: Re-Appointment

### Re-Appointment

- From your PI's *Trainee Roster* screen, select a **Re-Appoint 2271** link (your trainer will identify one for you) and process the Re-Appointment.

**\*\* You may want to try this exercise using your ASST account to initiate the Re-Appointment. \*\***

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## Amendment

- Once an Appointment is Accepted by Agency, an Amendment is needed to change any of the following items:
  - Name
  - Permanent Mailing Address
  - Appointment Period
  - Support from the Grant
- Submit an Amendment as soon as the change occurs

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Amendments follow the same basic flow as Appointments/Re-appointments  
PI Trainee Roster screen

Application	Appointment	FY	Appointment	Termination	End	Degree	Appointment	Appointment	Termination	Termination	View	Action
Trainee Name	Type		Start Date	End Date	Date	Level	Status	Source	Status	Source		
5T32DK065517-04 (Budget Period: 07/01/2007-06/30/2008) <a href="#">Create New Appointment</a>												
Beaker, Kim Estry	New	2007	07/01/2007	06/30/2008		No	PRE-DOC	<a href="#">Pending Agency Review</a>	Electronic			<a href="#">View 2271</a>
Gibb, Scarlett K.	New	2007	07/01/2007	06/30/2008		No	PRE-DOC	<a href="#">Accepted</a>	Electronic			<a href="#">View 2271</a> <a href="#">Amend 2271</a>

PD/PI selects Amend 2271

Top of 2271 form

**Statement of Training Appointment**

Project Number: T32 DK 065517  
 Appointment Status: [Accepted](#) [View Routing History](#)  
 Project Title: RESEARCH TRAINING IN PEDIATRIC INSTITUTIONS EXT UAT DEMO CORP.  
 Institution: EXT UAT DEMO CORP.  
 PI Name: Money, Cher D

PHS 2271 OMB No. 0925-0001  
 \* Indicates required field

**Trainee Personal Information**  
 For every research training appointment or re-appointment, trainees should top of this page. Except for the e-mail address, personal information must be provided.

Last Name, First Name, MI: Gibb, Scarlett K.

The 2271 form is opened and the PD/PI can edit the appropriate fields.

Bottom of 2271 form

**Period of Appointment**

\* From (MM/DD/YYYY) 07/01/2007  
 \* To (MM/DD/YYYY) 03/20/2008  
 8 months 20 days [Re-calculate](#)  
 select dates.

**Support for Period of Appointment**

**Type**  
 \* Stipend Level PRE - 20,772; PRE-DOC  
 \* Stipend 14887  
 \* Tuition/Fees (estimated) 2000  
 \* Travel 200  
 Total 17087

**Total for this Grant (Omit cents)**

PD/PI Saves the edits.

[Save](#) [Cancel](#)

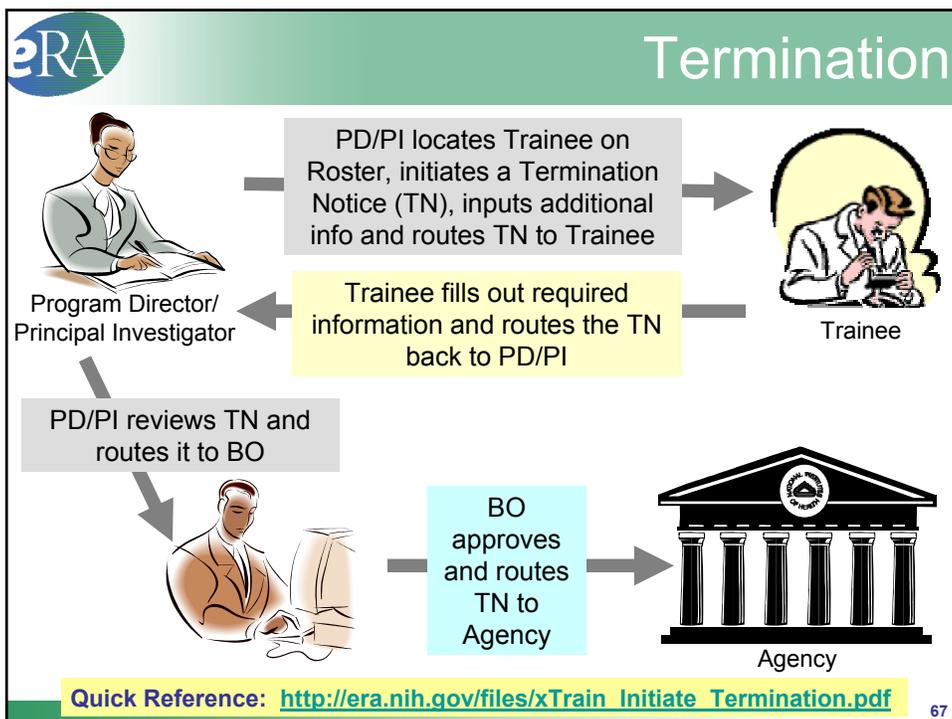
A new line is added to the *Trainee Roster* with **Appointment Type** of **Amendment** and **Appointment Status** of **In Progress PI**.

PI Trainee Roster screen

Application	Appointment	FY	Appointment	Termination	End	Degree	Appointment	Appointment	Termination	Termination	View	Action
Trainee Name	Type		Start Date	End Date	Date	Level	Status	Source	Status	Source		
5T32DK065517-04 (Budget Period: 07/01/2007-06/30/2008) <a href="#">Create New Appointment</a>												
Beaker, Kim Estry	New	2007	07/01/2007	06/30/2008		No	PRE-DOC	<a href="#">Pending Agency Review</a>	Electronic			<a href="#">View 2271</a>
Gibb, Scarlett K.	New	2007	07/01/2007	06/30/2008		No	PRE-DOC	<a href="#">Accepted</a>	Electronic			<a href="#">View 2271</a> <a href="#">Amend 2271</a>
Gibb, Scarlett K.	Amendment	2007	07/01/2007	03/20/2008		No	PRE-DOC	<a href="#">In-Progress PI</a>	Electronic			<a href="#">View 2271</a> <a href="#">Process 2271</a>

The **Process 2271** action link is used to continue the process just like an Appointment (i.e., Route to Trainee, Submit).





**Termination Notice**

- Termination Notices are typically initiated by the PD/PI
  - BOs also can initiate a Termination Notice

PI Trainee Roster screen

Application Trainee Name	Appointment Type	FY	Appointment		Termination Date	End Date Past?	Degree Level	Appointment Status	Appointment Source	Termination Status	Termination Source	View	Action
			Start Date	End Date									
5T32DK065517-04 (Budget Period: 07/01/2007-06/30/2008) <a href="#">Create New Appointment</a>													
Beaker, Kim Estry	New	2007	07/01/2007	06/30/2008		No	PRE-DOC	Accepted	Electronic			<a href="#">View 2271</a>	<a href="#">Initiate TN</a>

Select **Initiate TN** to begin Termination process.

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**eRA PD/PI Termination Notice**

Termination Notice (form 416-7)

**Termination Notice - Ruth L. Kirschstein National Research Service Award**

**Project Number:** T32 DK 065517  
**Termination Status:**  
**Project Title:** RESEARCH TRAINING IN PEDIATRIC NEPHROLOGY  
**Institution:** EXT UAT DEMO CORP.  
**PD Name:** Money, Cher D

\* Indicates required field PHS 416-7 OMB No. 0925-0002

**Trainee Personal Information**

Before a research training appointment is terminated, trainees should review and update their personal information by using the P for the e-mail address, personal information may only be entered or modified by the trainee.

**Last Name, First Name, MI:** Beaker, Kim Estry

**Address Line 1:** 123 My Street  
**Address Line 2:**  
**Address Line 3:**  
**Address Line 4:**

**City, State, ZIP:** My City, VA, 20882  
**Country:** UNITED STATES

\* **Email:** nihelectronicsubmiss@  
**Phone:** 555-111-2222  
**Fax:**

Degree(s) Earned In Progress	Completion Date	Major/Minor	Degree Completed?
BSN	05/1988	/	Y

\* screen continued on next slide \*

The Termination Notice is opened and pre-populated with information pulled from the Trainee profile.

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**eRA PD/PI Termination Notice**

\* screen continued from previous slide \*

Termination Date and Business Official submitting the Termination Notice to NIH

Termination Date: 06/30/2008  Business Official: Happy, IDA  Choose a BO from drop-down list.

Total Kirschstein - NRSA Support Under This Award

Support Year	Start Date	End Date	Amount of Stipend	Number of Months	Days
Year 4	07/01/2007	06/30/2008	20772.0	12	0
<b>Totals:</b>			20772.00		

Training Received

Provide a summary of training received and research undertaken during trainee tenure. List publications from the research during this period. List grants and career awards pending and received. *If training terminated early, state reason.* (2000 characters maximum)

- OR -

Upload PDF File

Post Award Information

<input type="radio"/> Teaching	<input type="radio"/> Academic	<input type="radio"/> Grad Student
<input type="radio"/> Research	<input type="radio"/> For-Profit	<input type="radio"/> Postdoctoral Research
<input type="radio"/> Administration	<input type="radio"/> Government	<input type="radio"/> Faculty, Tenure-Track
<input type="radio"/> Other <input type="text"/>	<input type="radio"/> Not For-Profit	<input type="radio"/> Staff Scientist
	<input type="radio"/> Other <input type="text"/>	<input type="radio"/> Other <input type="text"/>

**Modify Termination Date**

You are requesting to modify the Termination Date. Note that you can only change this Date to shorten the last Trainee Appointment period. Upon acceptance of the Termination Notice form by Agency, the system will automatically amend the last appointment end date and re-calculate the stipend amount for the last appointment. The system will pre-populate a recalculated stipend amount into the enterable field on the Termination Notice Form (you will see it as soon as you click Continue on this screen), and you can further modify the stipend amount right on that screen

\* Termination Date: 04/19/2008

The **Modify Termination Date** button is used to shorten the last Appointment period. The system will automatically amend the last Appointment end date and will recalculate the stipend.

\* screen continued on next slide \*

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# Termination Notice

**PD/PI**

\* screen continued from previous slide \*

If known, enter position title, organization, and related information:

Position Title:   
 Field:   
 Name of Organization:   
 City:   
 State:   
 Phone No:

Mailing Address after Termination of this Kirschstein-NRSA Support

Street:   
 City:   
 State:   
 ZIP:   
 Phone No:   
 Email:

Other PHS Service Obligation Support

National Health Service Corps Scholarship: No. of Months:   
 Kirschstein-NRSA: No. of Months:

If the trainee has previously received support from other Kirschstein-NRSA training grants or fellowships, it will be listed in the table below. If the list of prior support is incomplete or incorrect, please click the NIH Support menu tab above and follow the instructions for verifying NRSA support.

Grant Number	From	To
Is the trainee currently participating in NIH Loan Repayment Program? <input type="radio"/> Yes <input checked="" type="radio"/> No		

**Termination Notice Confirmation**

The Termination Notice was initiated successfully and is currently assigned to you. To further process the Termination Notice (to Route to another person, etc.) click Process TN link within the list of appointments screen, navigate to the bottom of the form and click appropriate action button.

5T32DK065517-04 (Budget Period: 07/01/2007-06/30/2008) <a href="#">Create New Appointment</a>													
Beaker, Kim Estry	New	2007	07/01/2007	06/30/2008	04/19/2008	No	PRE-DOC	<a href="#">Accepted</a>	Electronic	<a href="#">In Progress PI</a>	Electronic	<a href="#">View 2271 View TN</a>	<a href="#">Amend 2271 Process TN</a>

**PD/PI Saves the edits.**

**Status changed to In Progress PI.**

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# Termination Notice

**PD/PI**

PI Trainee Roster screen

5T32DK065517-04 (Budget Period: 07/01/2007-06/30/2008) <a href="#">Create New Appointment</a>													
Beaker, Kim Estry	New	2007	07/01/2007	06/30/2008	04/19/2008	No	PRE-DOC	<a href="#">Accepted</a>	Electronic	<a href="#">In Progress PI</a>	Electronic	<a href="#">View 2271 View TN</a>	<a href="#">Amend 2271 Process TN</a>

**Top of form...**

**Termination Notice - Ruth L. Kirschstein National Research Service Award**

**Bottom of form...** DK 065517

Other PHS Service Obligation Support

National Health Service Corps Scholarship: No. of Months:   
 Kirschstein-NRSA: No. of Months:

\* indicates re  
 Trainee Per:  
 Before a res  
 for the e-ma  
 Last Name.

If the trainee has previously received support from other Kirschstein-NRSA training grants or fellowships, it will be listed in the table below. If the list of prior support is incomplete or incorrect, please click the NIH Support menu tab above and follow the instructions for verifying NRSA support.

Grant Number	From	To
Is the trainee currently participating in NIH Loan Repayment Program? <input type="radio"/> Yes <input checked="" type="radio"/> No		

**Additional action buttons now appear at the bottom of the TN form.**

**Select the Route to Trainee button.**

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**eRA PD/PI** Termination Notice

**Provide Comments**

If you would like to send comments by e-mail to the next recipient of this form, please insert them below.

**Comments:**  
 Kim,  
 I have started a Termination Notice for you. Please complete the remaining information and return the form to me. As we discussed your Termination date will be April 19. Let me know if you have any questions.  
 Cher D. Money

Comments (up to 2000 characters) will be included in email message sent to Trainee. Click **Continue** button.

**Termination Notice Confirmation**

The Termination Notice was successfully routed and Email about this action was sent to Trainee

PI Trainee Roster screen

Grant Number	Appointment Start Date	Appointment End Date	Termination Date	Program Director	Institution	Degree Level	Appointment Status	Termination Status	View	Action		
5T32DK065517-04	2007-07-01	2008-06-30	2008-04-19	Money, Cher D	EXT UAT DEMO CORP.	PRE-DOC	Accepted	Electronic	<b>In Progress Trainee</b>	Electronic	<a href="#">View 2271</a> <a href="#">View TN</a>	<a href="#">Amend 2271</a>

Status is set to **In-Progress Trainee**.

**eRA Trainee** Termination Notice

Trainee Appointments and Terminations screen

Grant Number	Appointment Start Date	Appointment End Date	Termination Date	Program Director	Institution	Degree Level	Appointment Status	Termination Status	View	Action
5T32DK065517-04	2007-07-01	2008-06-30	2008-04-19	Money, Cher D	EXT UAT DEMO CORP.	PRE-DOC	Accepted	In Progress Trainee	<a href="#">View 2271</a> <a href="#">View TN</a>	<b>Process TN</b>

**Termination Notice - Ruth L. Kirschstein National Research Service Award**

**Project Number:** T32 DK 065517  
**Termination Status:** In Progress Trainee [View Routing History](#)  
**Project Title:** RESEARCH TRAINING IN PEDIATRIC NEPHROLOGY  
**Institution:** EXT UAT DEMO CORP.  
**PD Name:** Money, Cher D

\* indicates required field **PHS 416-7 OMB No. 0925-0002**

**Trainee Personal Information**  
 Before a research training appointment is terminated, trainees should review and update their personal information by using the PE for the e-mail address, personal information may only be entered or modified by the trainee.

**Last Name, First Name, MI:** Beaker, Kim Estry  
**SSN:**

**Address Line 1:** 123 My Street  
**Address Line 2:**  
**Address Line 3:**  
**Address Line 4:**

**City, State, ZIP:** My City, VA, 20882  
**Country:** UNITED STATES

**\* Email:** [nhielectronicssubmiss@](mailto:nhielectronicssubmiss@)  
**Phone:** 555-111-2222  
**Fax:**

**Degree(s) Earned/In Progress Completion Date Major/Minor Degree Completed?**  
 BSN 05/1988 / Y

The Termination Notice is opened and pre-populated with information pulled from the Trainee profile and previously entered data.

\* screen continued on next slide \*

**eRA Trainee Termination Notice**

\* screen continued from previous slide \*

Termination Date and Business Official submitting the Termination Notice to NIH

Termination Date: 04/19/2008 Business Official: Hayslip, IDA

Total Kirschstein - NRSA Support Under This Award

Support Year	Start Date	End Date	Amount of Stipend	Number of Months	Days
Year 4	07/01/2007	06/30/2008	16617.6	12	0
<b>Totals:</b>			16617.60		

Training Received

Provide a summary of training received and research undertaken during trainee tenure. List publications, if any, resulting from the research during this period. List grants and career awards pending and received. *If training appointment is being terminated early, state reason.* (2000 characters maximum)

- OR -

Upload PDF File

TrainingReceivedSample.pdf

Post Award Information

Activity	Organization	Type of Position
<input type="radio"/> Teaching	<input type="radio"/> Academic	<input type="radio"/> Grad Student
<input checked="" type="radio"/> Research	<input type="radio"/> For-Profit	<input type="radio"/> Postdoctoral Researcher
<input type="radio"/> Administration	<input type="radio"/> Government	<input type="radio"/> Faculty, Tenure-Track
<input type="radio"/> Other _____	<input checked="" type="radio"/> Not For-Profit	<input checked="" type="radio"/> Staff Scientist
	<input type="radio"/> Other _____	<input type="radio"/> Other _____

Document training received either in comment field or via file upload.

Click appropriate radio buttons for: **Activity**, **Organization** and **Type of Position**.

\* screen continued on next slide \*

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**eRA Trainee Termination Notice**

\* screen continued from previous slide \*

If known, enter position title, organization, and related information:

Position Title: Researcher  
 Field: Alternative Medicine  
 Name of Organization: Another Way  
 City: San Francisco  
 State: CALIFORNIA  
 Phone No: 555-123-4444

Mailing Address after Termination of this Kirschstein-NRSA Support

\* Street: 123 Park Place  
 \* City: San Francisco  
 \* State: CALIFORNIA  
 \* ZIP: 94102  
 \* Phone No: 555-333-1234  
 \* Email: kim.beaker@junkit.com

Other PHS Service Obligation Support

National Health Service Corps Scholarship: No. of Months: 0  
 Kirschstein-NRSA: No. of Months: 0

If the trainee has previously received support from other Kirschstein-NRSA training grants or fellowships, it will be listed in the table below. If the list of prior support is incomplete or incorrect, please click the NIH Support menu tab above and follow the instructions for verifying NRSA support.

Grant Number	From	To
--------------	------	----

\* Is the trainee currently participating in NIH Loan Repayment Program?  Yes  No

If known, enter position title, organization and related information.

Provide mailing address where you can be reached after Termination.

Review all information, then **Route to PI**.

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# Termination Notice



**Provide Comments**

If you would like to send comments by e-mail to the next recipient of this form, please insert them below.

**Comments:**  
Dr. Money,  
I believe the form now is

Kim Beaker

**Termination Notice Certification**

In signing this form, I certify that the statements therein are true and complete to the best of my knowledge. Willful provision of false information is a criminal offense (U.S. Code, Title 18, Section 1001). I am aware that any false, fictitious, or fraudulent statement may, in addition to other remedies available to the Government, subject me to civil penalties under the Program Fraud and Civil Remedies Act of 1986 (45 CFR Part 79). Also, if I have a payback obligation, I understand that payback service must begin within 2 years of terminating my Kirschstein-NRSA support; otherwise, financial payback becomes due, unless an extension of the 2-year service initiation period or a waiver of the obligation is granted. I also understand that if I fail to repay both principal and interest, the Federal Government will take authorized actions to collect the debt.

**Termination Notice Confirmation**

The Termination Notice was successfully routed and Email about this action was sent to PI

Comments (up to 2000 characters) will be included in email message sent to PD/PI.

Click **Continue** button.

Electronic Signature recorded.

Status is set to **In Progress PI**.

**Trainee Appointments and Terminations screen**

Grant Number	Appointment Start Date	Appointment End Date	Termination Date	Program Director	Institution	Degree Level	Appointment Status	Termination Status	View	Action
5T32DK065517-04	2007-07-01	2008-06-30	2008-04-19	Money, Cher D	EXT UAT DEMO CORP.	PRE-DOC	Accepted	In Progress PI	<a href="#">View 2271</a>	<a href="#">View TN</a>

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# Termination Notice



- The PD/PI cannot submit the Termination Notice. It must be routed to the Business Official (BO) for submission.

**PI Trainee Roster screen**

Application	Trainee Name	Appointment Type	FY	Appointment		Termination Date	End Date Past?	Degree Level	Appointment Status	Appointment Source	Termination Status	Termination Source	View	Action
				Start Date	End Date									
5T32DK065517-04 (Budget Period: 07/01/2007-06/30/2008) <a href="#">Create New Appointment</a>														
	Beaker, Kim Estry	New	2007	07/01/2007	06/30/2008	04/19/2008	No	PRE-DOC	Accepted	Electronic	In Progress PI	Electronic	<a href="#">View 2271</a> <a href="#">View TN</a>	<a href="#">Amend</a> <a href="#">Process TN</a>

**Bottom of form...**

**Other PHS Service Obligation Support**

**National Health Service Corps Scholarship:** No. of Months:

**Kirschstein-NRSA:** No. of Months:

If the trainee has previously received support from other Kirschstein-NRSA training grants or fellowships, it will be listed in the table below. If the list of prior support is incomplete or incorrect, please click the NIH Support menu tab above and follow the instructions for verifying NRSA support.

Grant Number	From	To
Is the trainee currently participating in NIH Loan Repayment Program? <input type="radio"/> Yes <input checked="" type="radio"/> No		

Select the **Route to BO** button.

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# Termination Notice



### Provide Comments

If you would like to send comments by e-mail to the next recipient of this form, please insert them below.

**Comments:**

Ida,  
Here is the Termination Notice for Kim Beaker. Her new termination date is April 19. I've reviewed the document and believe it is complete.  
Let me know if you have any questions.  
Cher Money

**Continue**

**Click *Continue* button.**

### Termination Notice Certification

I certify that to the best of my knowledge all the above information is correct.

**I Certify**

**Electronic Signature recorded.**

### Termination Notice Confirmation

The Termination Notice was successfully routed to the designated Business Official. For predoctoral trainees, no further action is required. To terminate postdoctoral Kirschstein-NRSA research training appointments, an original signature is required on the Termination Notice, and the appointment will not be terminated until the Agency receives the signed form.

**Done**

**PI Trainee Roster screen**

5T32DK065517-04 (Budget Period: 07/01/2007-06/30/2008) [Create New Appointment](#)

Beaker, Kim Estry	New	2007 07/01/2007	06/30/2008	04/19/2008	No	PRE- DOC	<a href="#">Accepted</a>	Electronic	<b>In Progress BO</b>	Electronic	<a href="#">View 2271</a> <a href="#">View TN 2271</a>
----------------------	-----	-----------------	------------	------------	----	-------------	--------------------------	------------	---------------------------	------------	---

**Status is set to *In Progress BO*.**

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# Termination Notice



- xTrain users with the BO role are brought to a grant search screen when the xTrain tab is selected.



Welcome bhappy  
Institution: EXT UAT DEMO CORP.  
Authority: BO [Log-out](#)

Version 2.15.1.2

[Home](#) [Admin](#) [Institution Profile](#) [Personal Profile](#) [eSNAP](#) **[xTrain](#)** [Links](#) [eRA Partners](#) [Help](#)

Search for Grants

### List of Grants

Activity Code	IC	Serial Number	PD Last Name	Project Start Date	Project End Date	
			Money			<input type="button" value="Search"/> <input type="button" value="Clear"/>

**Provide search criteria and click the *Search* button.**

**BO Trainee Roster**



Welcome bhappy  
Institution: EXT UAT DEMO CORP.  
Authority: BO [Log-out](#)

Version 2.15.1.2

[Home](#) [Admin](#) [Institution Profile](#) [Personal Profile](#) [eSNAP](#) **[xTrain](#)** [Links](#) [eRA Partners](#) [Help](#)

Search for Grants

### List of Grants

Activity Code	IC	Serial Number	PD Last Name	Project Start Date	Project End Date	
			Money			<input type="button" value="Search"/> <input type="button" value="Clear"/>

1 - 2 of 2

Number	Project Start Date	Project End Date	Program Director	Project Title	Action
<a href="#">T32 DK 061208</a>	04/01/2002	03/31/2009	Money, Cher D	MOLECULAR MECHANISMS & NOVEL THERAPIES OF NEPHRON INJURY	<a href="#">View Trainee Roster</a>
<a href="#">T32 DK 065517</a>	07/01/2004	06/30/2009	Money, Cher D	RESEARCH TRAINING IN PEDIATRIC NEPHROLOGY	<a href="#">View Trainee Roster</a>

**Select the *View Trainee Roster* link.**

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# eRA BO Termination Notice

- The BO has access to xTrain Actions from the **Trainee Roster**.

BO Trainee Roster screen

Application	Trainee Name	Appointment Type	FY	Appointment		Termination Date	End Date Past?	Degree Level	Appointment Status	Appointment Source	Termination Status	Termination Source	View	Action
				Start Date	End Date									
5T32DK065517-04 (Budget Period: 07/01/2007-06/30/2008)														
	Beaker, Kim Esty	New	2007	07/01/2007	06/30/2008	04/19/2008	No	PRE-DOC	Accepted	Electronic	In Progress BO	Electronic	View 2271 View TN	Process TN

Select the **Process TN** link.

Bottom of form...

National Health Service Corps Scholarship: No. of Months:

Kirschstein-NRSA: No. of Months:

If the trainee has previously received support from other Kirschstein-NRSA training grants or fellowships, it will be listed in the table below. If the list of prior support is incomplete or incorrect, please click the NIH Support menu tab above and follow the instructions for verifying NRSA support.

Grant Number	From	To

Is the trainee currently participating in NIH Loan Repayment Program?  Yes  No

Save Cancel Reset Route to Trainee Route to PI **Submit to Agency** Delete View PDF

BO reviews TN and clicks **Submit to Agency** to complete the process.

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# eRA BO Termination Notice

## Provide Comments

If you would like to send comments by e-mail to the next recipient of this form, please insert them below.

### Comments:

This Termination Notice for Kim Beaker reflects her new termination date of April 19.

Ida B. Happy

Comments (up to 2000 characters) will be included in email message sent to Agency.

Continue Cancel

Click **Continue** button.

## Termination Notice Certification

I certify that the information provided for "Dates of Support Under This Award", and "Total Stipend Received & Number of Months Supported under this Award" is correct according to institutional records.

I Certify Cancel

Electronic Signature recorded.

## Termination Notice Confirmation

The Termination Notice was successfully submitted to the Agency, and the Agency's grant specialists will be notified. For predoctoral trainees, no further action is required. To terminate postdoctoral Kirschstein-NRSA research training appointments, an original signature is required on the Termination Notice, and the appointment will not be terminated until the Agency receives the signed form.

Done

Don't forget to mail the signed Termination Notice to Agency for Post-docs .

BO Trainee Roster screen

5T32DK065517-04 (Budget Period: 07/01/2007-06/30/2008)														
	Beaker, Kim Esty	New	2007	07/01/2007	06/30/2008	04/19/2008	No	PRE-DOC	Accepted	Electronic	Pending Agency Review	Electronic	View 2271 View TN	

Status is set to **Pending Agency Review**.

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## View TN & View PDF

Application Trainee Name	Appointment Type	FY	Appointment		Termination Date	End Date Past?	Degree Level	Appointment Status	Appointment Source	Termination Status	Termination Source	View	Action
			Start Date	End Date									
5T32DK065517-04 (Budget Period: 07/01/2007-06/30/2008)													
Beaker, Kim Estry	New	2007	07/01/2007	06/30/2008	04/19/2008	No	PRE-DOC	Accepted	Electronic	Pending Agency Review	Electronic	<a href="#">View TN</a>	

- Any xTrain user can use the View TN link in the Trainee Roster or use the View PDF button at the bottom of the form to look at the current document
  - If not yet submitted to Agency (or if previously submitted on paper), the system creates the view "on the fly" pulling the most current info from the profile/database and any entered data.
  - If already electronically submitted, a "snapshot" of the form at time of submission is displayed.
  - Uses most recently OMB-approved form.
    - For historical paper submissions, the form may not look identical to the one submitted.



Save Cancel Reset Route to Trainee Route to PI Submit to Agency Delete [View PDF](#)

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## Hands-on: Termination

### Termination

- From your PI's **Trainee Roster** screen, identify the trainee that you will be terminating and select the **Initiate TN** link.
  - You will need to:
    - Enter PI-supplied information (don't forget to select your BO account from the Business Official drop-down menu)
    - Route to Trainee**
    - Login as Trainee and enter Trainee-supplied information
    - Route to PI**
    - Login as PI, review the form and **Route to BO**
    - Login as BO, review the form and **Submit to Agency**

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- Links of Interest
  - eRA Commons  
<https://commons.era.nih.gov/commons/>
  - eRA Web site <http://era.nih.gov/>
  - xTrain Web Page: application guide, quick reference sheets, FAQs, training materials  
[http://era.nih.gov/services\\_for\\_applicants/other/xTrain.cfm](http://era.nih.gov/services_for_applicants/other/xTrain.cfm)
  - Ruth L. Kirschstein National Research Service Award page: policy information, stipend levels, FAQs  
<http://grants.nih.gov/training/nrsa.htm>
  - NIH Forms & Applications  
<http://grants.nih.gov/grants/forms.htm>

## eRA Commons Help Desk

- Hours: Mon–Fri, 7 a.m. – 8 p.m. Eastern
- Web: <http://ithelpdesk.nih.gov/eRA/>
- Toll-free: 1-866-504-9552
- Phone: 301-402-7469
- TTY: 301-451-5939



**Don't forget to get a help desk ticket number if your issue isn't immediately resolved.**