



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



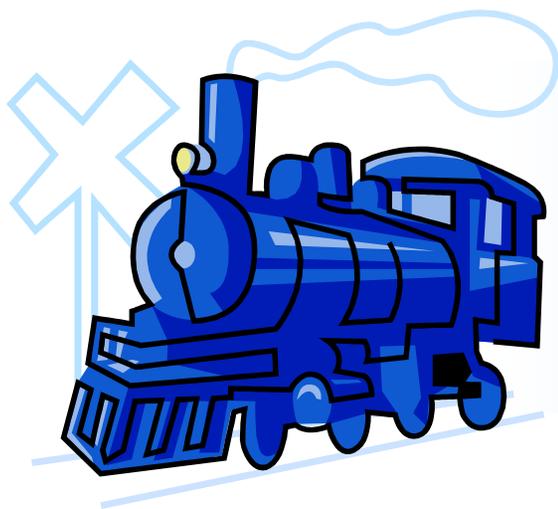


- **xTrain Basics**
 - **Research Training Grants**
 - **What is xTrain?**
 - **xTrain Users & Roles**
 - **Account Set-up**
- **Using xTrain**
 - **Delegation**
 - **Appointments**
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 - **Amendments**
 - **Terminations**
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xTrain 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>



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)



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



- 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

- **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

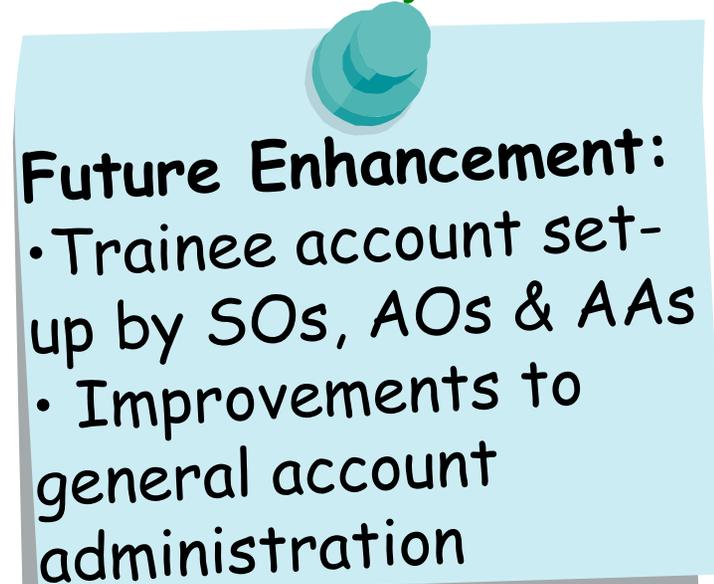
*Throughout this presentation assume
PD/PI Delegate (ASST) = PD/PI (PI)
(except when submitting actions to Agency).*

- 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



- 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 accounts
 - Seek out these individuals for assistance with your account set-up
- Trainees without eRA Commons accounts currently are registered as part of the xTrain process

A light blue callout box with a teal circular graphic at the top left, containing text about future enhancements.

Future Enhancement:

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



Electronic Research Administration

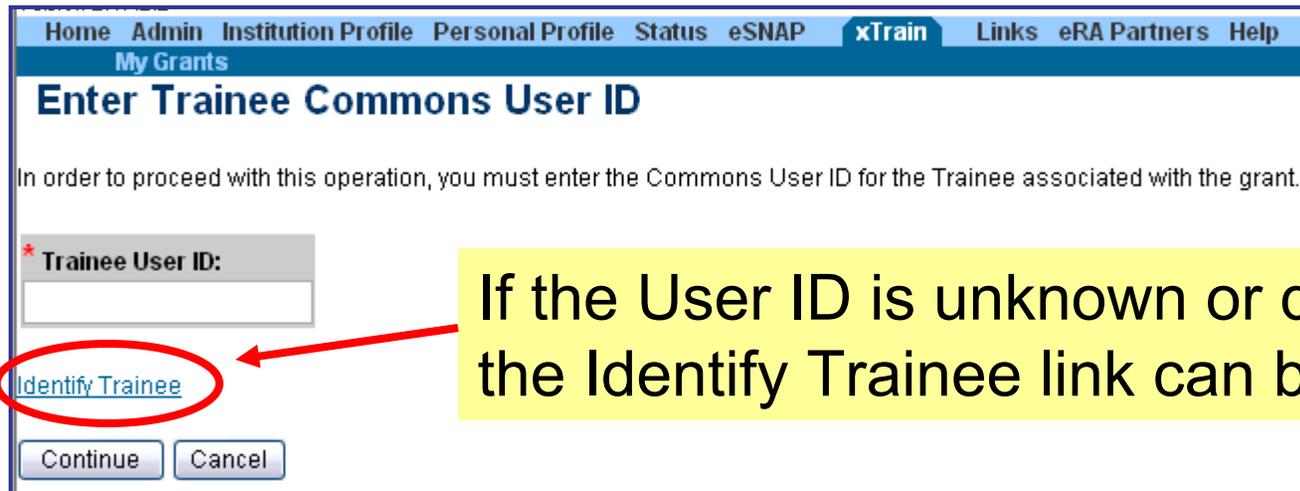
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Trainee Account Set-up

Inviting a Trainee to Register

- Let's look at the steps taken to invite a Trainee to register from within xTrain
- When PD/PIs select **Create New Appointment** within xTrain, they are prompted for the Trainee's User ID

A screenshot of a web application interface. At the top, there is a navigation bar with links: Home, Admin, Institution Profile, Personal Profile, Status, eSNAP, xTrain (highlighted), Links, eRA Partners, and Help. Below this is a sub-header 'My Grants'. The main heading is 'Enter Trainee Commons User ID'. A message states: 'In order to proceed with this operation, you must enter the Commons User ID for the Trainee associated with the grant.' There is a text input field labeled '* Trainee User ID:'. Below the input field is a blue underlined link 'Identify Trainee' which is circled in red. At the bottom are two buttons: 'Continue' and 'Cancel'.

If the User ID is unknown or does not exist, the Identify Trainee link can be used.

Inviting a Trainee to Register

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

My Grants

Identify Trainee

Grant: 5 T32 MH 312008-4
 Project Title: xTrain Demo Training Grant
 Budget Start/End Dates: 07/01/2003-06/30/2008

Enter search parameters to locate existing Profiles with Training or Fellowship involvement with NIH. If the desired Trainee is found, select "Create New Appointment" link to proceed to 2271 form. If you do not find the desired Trainee in the search result, use the button "Create New Profile" at the bottom of the screen prior to proceeding to 2271 form.

| * Last Name | First Name | Middle Name | Commons User ID |
|-------------|------------|-------------|-----------------|
| Newbie | Ima | | |

Search Clear

0 - 0 of 0

| Name | Institution | Email | Address | Commons User ID | Action |
|---|-------------|-------|---------|-----------------|--------|
| No records returned. Refine the search and try again. | | | | | |

Create New Trainee Profile

The PD/PI enters search parameters and clicks **Search**.

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

No match - Click **Create New Trainee Profile**.

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

My Grants

Create New Trainee Profile

Complete required information and select "Continue" button to proceed to 2271 form.

* Required

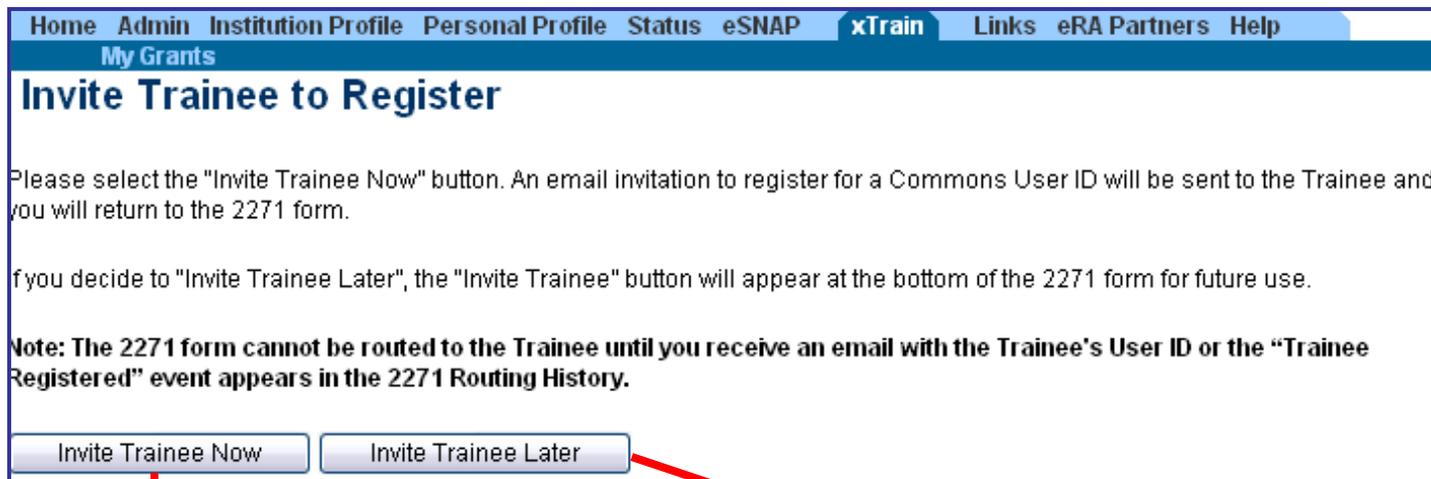
| * Last Name | * First Name | Middle Name | * Email Address |
|-------------|--------------|-------------|---------------------|
| Newbie | Ima | | askera@mail.nih.gov |

Continue Cancel

Complete info; click **Continue**.

Inviting a Trainee to Register

- PD/PI is placed in an Appointment form. Once some basic information is entered and the form is saved, the following screen appears.



Invite Trainee Now

- Email with a link to register sent to Trainee
- PD/PI placed back in 2271 form
- ***Re-invite Trainee to Register*** button provided

Re-invite Trainee to Register

Invite Trainee Later

- PD/PI placed back in 2271 form
- ***Invite Trainee to Register*** button provided

Invite Trainee to Register



Inviting a Trainee to Register

- Other xTrain actions (e.g. Reappointment, Amendment, Termination Notice) against Appointments originally submitted in paper have similar functionality to register Trainee's
 - Once forms are initiated and saved, the ***Invite Trainee to Register*** screen is displayed when a Commons account does not exist for the Trainee
 - The Trainee must be registered before any action can be routed to them

Note:

The system will automatically add the Trainee role to an existing account found without one.

- Trainees should respond to the xTrain “Create an Account” registration invitation as soon as possible to avoid processing delays
 - Click on the link included in the email and follow the on-screen instructions

Dear Trainee:

This is a system-generated invitation from the eRA Commons xTrain website in connection with your participation as a Trainee for Program Director Money, Cher D on a Grant 5T32CA12345-4.

To participate in the Appointment and/or Termination forms submission, you will need to log on to the eRA Commons website with a user name and password.

Please visit this web site to create your account as soon as possible. Open your Web browser and go to the URL

<https://commons.era.nih.gov/commons/t.do?code=d83a25d73d498884&code2=f697146d1ed4fdf4>



Trainee

New Trainee Account

Create a New Account ?

Step 1 of 3

You are creating an NIH Commons account for **Ima Newbie** for the xTrain Trainee. Additionally, this account may be used in the future for other electronic interactions at the NIH. To activate your account, the following steps are required:

- 1 The form presented below must be completed.
- 2 Next, your NIH support and committee service will be presented. Note that only awarded grants and committees served, not including Special Emphasis Panels, are presented. Please help the NIH by verifying the accuracy of this information.
- 3 The last step in the process is a confirmation page.

Once you have confirmed your NIH support and committee service, the NIH will process your request. Generally, this takes the NIH 2 to 5 business days to associate all of your historical records to your new NIH Commons account. You will be notified by email when your account is activated. Be sure to remember the User Name and Password you are creating below, as you will need that information to log in when your account is activated.

Account Form

| | | |
|---|--|--|
| User Name * | <input type="text" value="ImaNewbie"/> | User Name must be at least 6 characters |
| Password * | <input type="password" value="....."/> | Password must be at least eight (8) characters and contain at least one letter, number and special character ! # \$ % * - _ = + < > For Example: \$!trainee Password cannot begin or end with a number |
| Re-type Password * | <input type="password" value="....."/> | |
| Phone * | <input type="text" value="301-555-1234"/> | |
| E-mail * | <input type="text" value="askera@mail.nih.gov"/> | |
| First Name | Middle Name | Last Name * |
| <input type="text" value="Ima"/> | <input type="text" value="Brand"/> | <input type="text" value="Newbie"/> |
| Organization <input type="text"/> | | |
| * indicates required field. | | |
| Providing Birth Date and SSN is for verification purposes only. This information assists the NIH in associating all your records with your new account. | | |
| Birth Date | mm / dd / yyyy | (123456789) SSN <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="button" value="Continue"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/> | | |

Step 1 of 3

Complete form and click **Continue.**

New Trainee Account

Verify NIH Support for Ima Newbie ?

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

Verify any support identified as a potential match, provide comments and click **Continue Account Request**.

Comments for NIH

This is correct, I have never received prior grant support. Thanks.
-Ima Newbie

Continue Account Request

Reject Account Request

Add NIH Support

Step 1 of 2

Click **Complete Account Request**.

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

Complete Account Request

Step 2 of 2

Comments on NIH

This is correct, I have never received prior grant support. Thanks. -Ima Newbie

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

Step 2 of 2

*Note that you are only permitted to view public information (i.e. grants which were awarded by NIH or Review Committees for which you are serving or have already served). Only the latest support year for a particular grant is displayed.



Accessing eRA Commons

In your Web browser go to:

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

Enter Commons Username and Password and Click Login

The screenshot shows the eRA Commons website interface. At the top, it says "Electronic Research Administration" and "Sponsored by National Institutes of Health". The main header features the "eRA Commons" logo and "Version 2.15.1.2". A navigation bar includes "Home", "Links", "eRA Partners", and "Help".

On the left side, there is a "What's NEW on the COMMONS" banner. Below it, a "COMMONS USER ALERT" dated February 8, 2008, states that the eRA system is back up and running. A "Support Tip" encourages users to use the new web support at <http://ithelpdesk.nih.gov/eRA/>. An "Electronic Submission Tip" points to [Avoiding Common Errors](#).

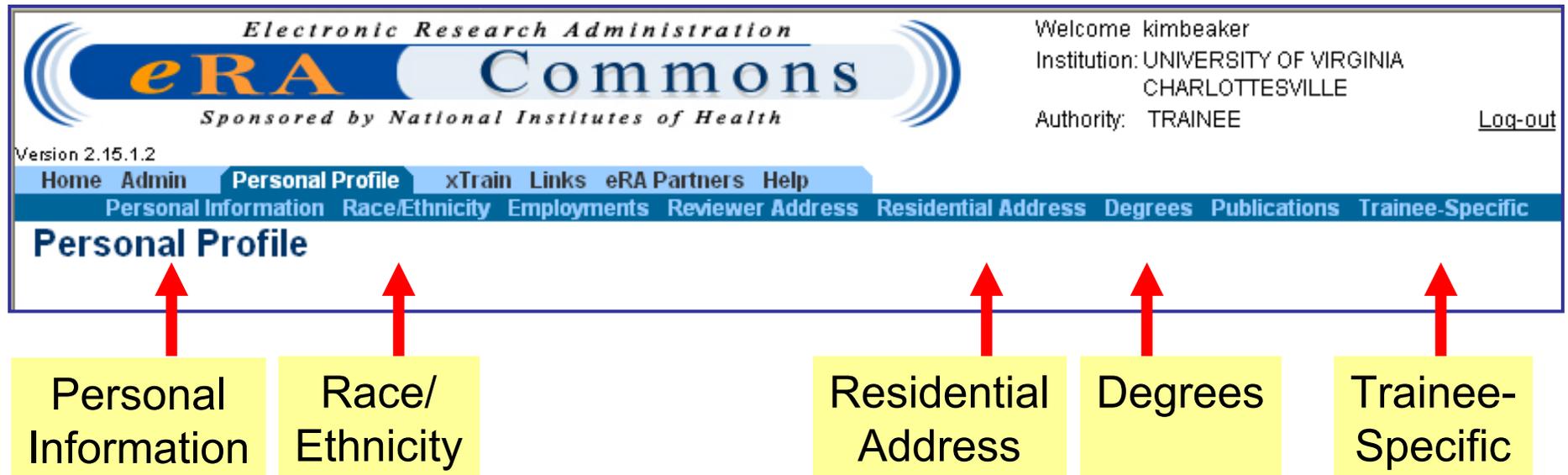
The "Commons Login" section is highlighted with a red bracket and includes a question mark icon and a note: "* indicates required field." It contains two input fields for "Username" and "Password", both marked with an asterisk. Below the fields are "Login" and "Reset" buttons, and a link for "Forgot Password?".

On the right side, there is a "More Recent Features of Commons include:" section with several bullet points: "NEW xTrain has been released in a pilot mode for a limited pool of institutions...", "eSNAP - Allows an institution to review non-competing grant data...", "Reference Letters: To submit a reference letter...", "Internet Assisted Review (IAR) - Allows reviewer to submit critiques...", and "Demo Facility - Demo Facility allows you to try most of the capabilities...".

Below the features section, there are two columns of links: "About the Commons" (including "Scope and Purpose", "Frequently Asked Questions", "Grantee Organization Registration", "eRA Contacts", and "Enter eRA NIH Commons Demo") and "Links" (including "Commons Support Page", "CRISP", "eRA Home Page", "Electronic Application Submission", "Grants.gov", "iEdison", "Loan Repayment Program", "National Institutes of Health", and "Public Access Policy Page").

At the bottom right, there is a "System Notification" section.

- 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.



The screenshot shows the eRA Commons interface. At the top, it says "Electronic Research Administration" and "eRA Commons Sponsored by National Institutes of Health". The user is logged in as "kimbeaker" from the "UNIVERSITY OF VIRGINIA CHARLOTTESVILLE" with the authority of "TRAINEE". A "Log-out" link is visible. Below the header is a navigation menu with "Home", "Admin", "Personal Profile", "xTrain", "Links", "eRA Partners", and "Help". Under "Personal Profile", there are sub-links: "Personal Information", "Race/Ethnicity", "Employments", "Reviewer Address", "Residential Address", "Degrees", "Publications", and "Trainee-Specific". The "Personal Profile" link is highlighted. Below the screenshot, five yellow boxes with red arrows point to the "Personal Information", "Race/Ethnicity", "Residential Address", "Degrees", and "Trainee-Specific" links in the navigation menu.

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.



Trainee

Profile – Personal Info

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

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

Personal Information ?

Notes & Tips:

- No other users within your institution can view your Personal Profile information unless you delegate that authority to them.
- Providing Social Security Number (SSN) information helps agency staff uniquely identify and manage your system records.
- Personal information (e.g., gender, date of birth, disability) is used for aggregate statistical reporting only. This data is a vital tool in identifying and addressing any program inequities.
- Providing a middle name is especially important for individuals with common names.

* indicates required field

Identifying Information

Name Prefix:

Middle Name:

Name Suffix:

Gender*:

Citizenship:

eRA Email*:

First Name*:

Last Name*:

SSN: Enter last 4 digits or full SSN

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

Citizenship Country: For non-US citizens and permanent residents

Disabilities

Do you have a disability?

Yes No Do not wish to provide

If yes, which of the following categories describe your disability(ies)?

Hearing Visual Mobility/Orthopedic Impairment Other

Submit Reset Cancel

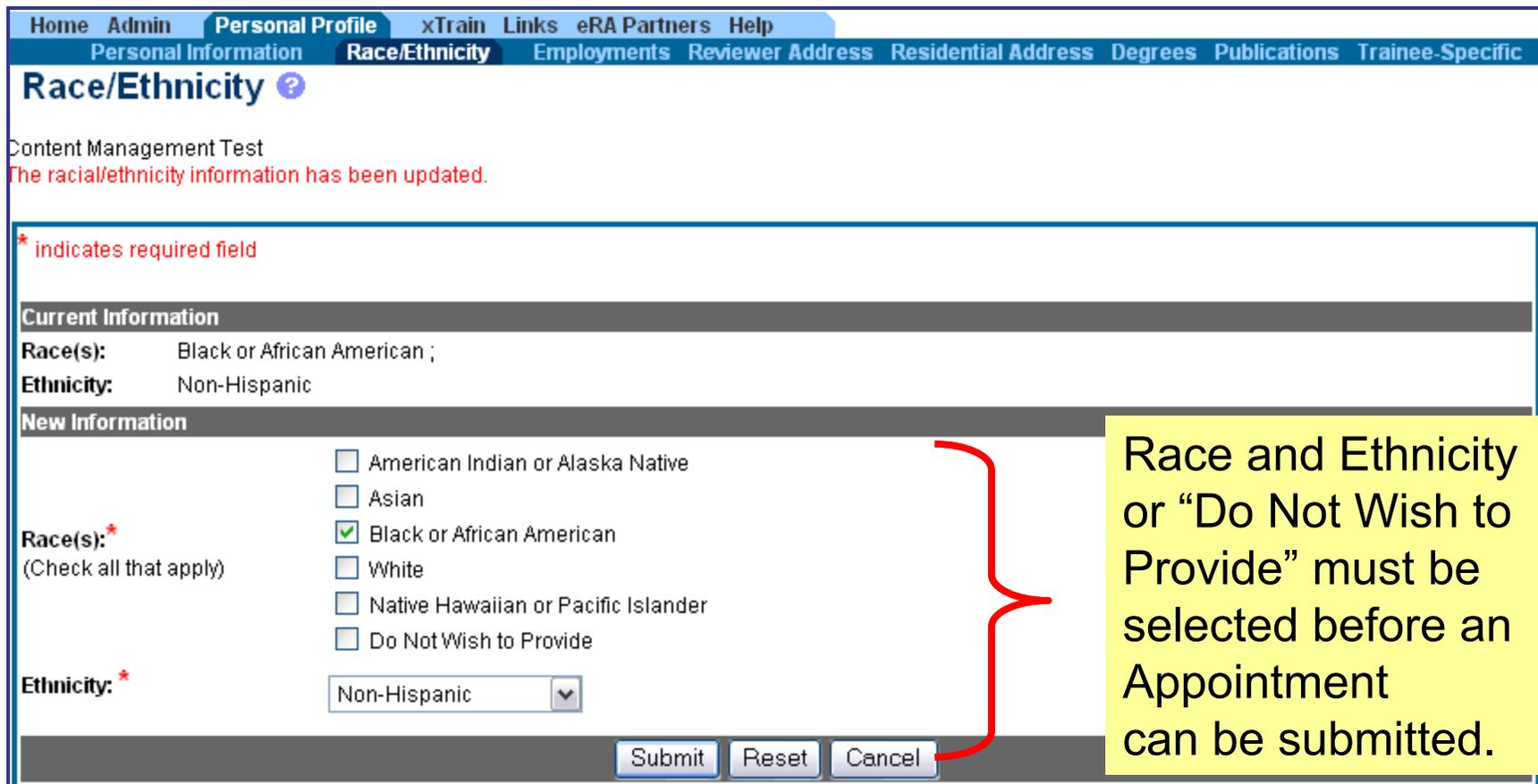
SSN requested. If not provided, you will get a Warning indicating that this information is helpful in accurate identification of an individual.

Required field for xTrain. Trainee must be a citizen or noncitizen national of the US or lawfully admitted for permanent residence.

Email used for xTrain notifications and "Forgot Password" function.

Required for xTrain.

- Information is used for aggregate reporting only.



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

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

Race/Ethnicity ?

Content Management Test
The racial/ethnicity information has been updated.

* indicates required field

Current Information

Race(s): Black or African American ;
Ethnicity: Non-Hispanic

New Information

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

American Indian or Alaska Native
 Asian
 Black or African American
 White
 Native Hawaiian or Pacific Islander
 Do Not Wish to Provide

Ethnicity:*
Non-Hispanic

Submit Reset Cancel

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



Profile – Residential Address

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

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

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

Residential Address ?

Tip:

- Trainees should provide the address where they can be reached by mail after completion of their program (i.e., permanent address.)

* indicates required field

| Residential Address | | | |
|----------------------|--|------------------------|--|
| Line 1: [*] | <input type="text" value="123 My Home Road"/> | City: [*] | <input type="text" value="My City"/> |
| Line 2: | <input type="text"/> | State: [*] | <input type="text" value="MARYLAND"/> |
| Line 3: | <input type="text"/> | Zip Code: [*] | <input type="text" value="12345"/> |
| Line 4: | <input type="text"/> | Country: [*] | <input type="text" value="UNITED STATES"/> |
| Phone: [*] | <input type="text" value="555-123-4567"/> | Fax: | <input type="text"/> |
| E-mail: [*] | <input type="text" value="askera@mail.nih.gov"/> | | |

Submit Reset Cancel

- 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

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

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

List of Degrees ?

Notes & Tips:

- Include **all** degrees completed or in progress.
- In addition to reporting, degree information is sometimes used to validate application information or populate system forms.
- Trainees - current information is critical as it can determine eligibility for certain types of appointments/awards and can affect stipend levels.

Degrees 1 - 2 out of 2 records

| Degree | Institution | Completion Date | Degree Completed? | Major | Action |
|-------------------------|----------------------|-----------------|-------------------|---------|---|
| BS: BACHELOR OF SCIENCE | HHS University | 05/2003 | Y | Biology | Edit Delete |
| MD: DOCTOR OF MEDICINE | Get Smart University | 05/2008 | Y | | Edit Delete |

[Add New Degree](#) [Close](#)

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

- 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.

Submit Reset Cancel



Disadvantaged Background

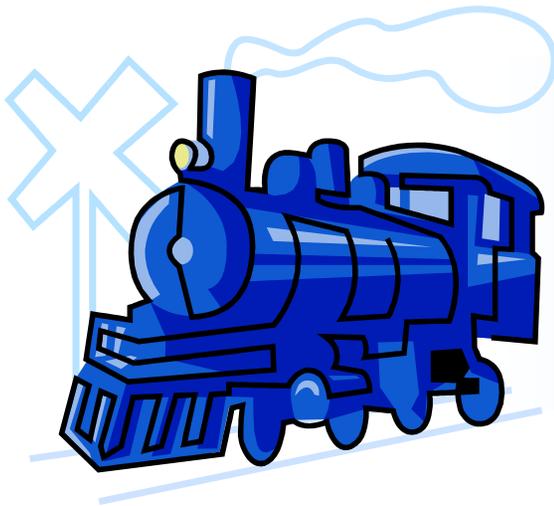
Individuals from disadvantaged backgrounds are defined as:

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.



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Using xTrain

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

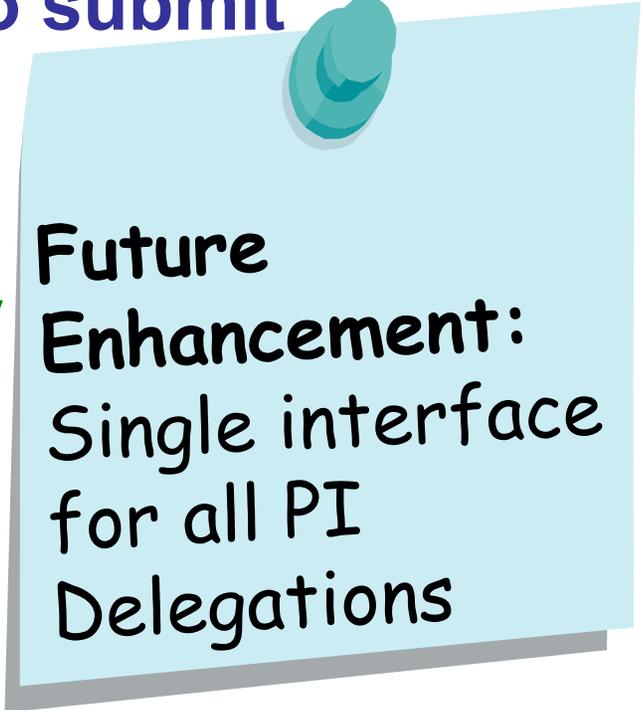


Delegate the ability to perform their xTrain actions to someone else!



Delegate xTrain Authority

- 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.
- Quick Reference
 - http://era.nih.gov/files/PI_delegation_xtrain_authority.pdf



Future Enhancement:
Single interface for all PI Delegations

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
eRA Commons
 Sponsored by National Institutes of Health

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

Version 2.13.3.1

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

Accounts Delegate PI Delegate PPF 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

- 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 | View Trainee Roster |
| T32 DK 061298 | 04/01/2002 | 03/31/2009 | Money, Cher D | MOLECULAR MECHANISMS & NOVEL THERAPIES OF NEPHRON INJURY | View Trainee Roster |
| T32 DK 065517 | 07/01/2004 | 06/30/2009 | Money, Cher D | RESEARCH TRAINING IN PEDIATRIC NEPHROLOGY | View Trainee Roster |

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.

| Number | Project Start Date | Project End Date | Program Director | Project Title | Action |
|-------------------------------|--------------------|------------------|------------------|--------------------------------|-------------------------------------|
| T32 GM 008715 | 07/01/2000 | 06/30/2010 | Money, Cher D | BIOTECHNOLOGY TRAINING PROGRAM | View Trainee Roster |
| T32 MH 312008 | 07/01/2003 | 06/30/2008 | Money, Cher D | XTRAIN DEMO TRAINING GRANT | View Trainee Roster |
| T32 DK 065417 | 07/01/2004 | | | | |

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

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

My Grants

Project: T32 MH 312008
 Title: XTRAIN DEMO TRAINING GRANT
 Project Start/End Dates: 07/01/2003 - 06/30/2008

| Grant Number | Budget Start Date | Budget End Date | FY | Program Director | Short Term | | Pre Docs | | Post Docs | |
|-------------------|-------------------|-----------------|------|------------------|------------|--------------|-----------|--------------|-----------|--------------|
| | | | | | Num Slots | Num Accepted | Num Slots | Num Accepted | Num Slots | Num Accepted |
| 1T32MH312008-01A1 | 07/01/2003 | 06/30/2004 | 2003 | Money, Cher M. | 0 | 0 | 1 | 1 | 1 | 1 |
| 5T32MH312008-02 | 07/01/2004 | 06/30/2005 | 2004 | Money, Cher M. | 0 | 0 | 2 | 1 | 0 | 1 |
| 5T32MH312008-03 | 07/01/2005 | 06/30/2006 | 2005 | Money, Cher M. | 0 | 0 | 2 | 1 | 2 | 1 |
| 5T32MH312008-04 | 07/01/2006 | 06/30/2007 | 2006 | Money, Cher M. | 0 | 0 | 2 | 2 | 1 | 2 |

[View Trainee Roster](#) [Back](#)

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

My Grants Click on *View Trainee Roster* link.

| Number | Project Start Date | Project End Date | Program Director | Project Title | Action |
|-------------------------------|--------------------|------------------|------------------|---|-------------------------------------|
| T32 GM 008715 | 07/01/2000 | 06/30/2010 | Money, Cher D | BIOTECHNOLOGY TRAINING PROGRAM | View Trainee Roster |
| T32 MH 312008 | 07/01/2003 | 06/30/2008 | Money, Cher D | XTRAIN DEMO TRAINING GRANT | View Trainee Roster |
| T32 DK 065517 | 07/01/2004 | 06/30/2009 | Money, Cher D | RESEARCH TRAINING IN PEDIATRIC NEPHROLOGY | View Trainee Roster |

Latest and Previous Awarded Support Years

Latest Awarded Support Year

Latest and Previous Awarded Support Years

All Years

| Application | Appointment Type | FY | Appointment Start Date | Appointment End Date | Termination Date | Low Date Past? | Degree Level | Appointment Status | Appointment Source | Termination Status | Termination Source | Current Reviewer | View | Action |
|-------------|------------------|----|------------------------|----------------------|------------------|----------------|--------------|--------------------|--------------------|--------------------|--------------------|------------------|------|--------|
|-------------|------------------|----|------------------------|----------------------|------------------|----------------|--------------|--------------------|--------------------|--------------------|--------------------|------------------|------|--------|

Make selection and click Go.

| 5T32MH312008-04 (Budget Period: 07/01/2006-06/30/2007) Create New Appointment | | | | | | | | | | | | | | |
|---|---------------|------|------------|------------|------------|-----|----------|---------------------------------------|------------|--------------------------------|------------|------------------------------|--|--|
| Beaker, Kim Estry | New | 2006 | 07/01/2006 | 06/30/2007 | | Yes | PRE-DOC | Pending Agency Review | Electronic | | | 2271: AGENCY | View 2271 | - 2271 Form |
| Beauty, Sleeping | Reappointment | 2006 | 07/01/2006 | 06/30/2007 | 06/30/2007 | Yes | POST-DOC | Terminated | Electronic | Accepted | Electronic | 2271: AGENCY TN: AGENCY | View 2271 View TN View Payback | - 2271 Form - Term Notice |
| Boys, Beagle | | 2006 | 07/01/2006 | 06/30/2007 | | Yes | PRE-DOC | Accepted | Paper | | | | View 2271 | - Amend 2271 - Initiate TN |
| Leslie, Daniel Christopher | New | 2006 | 01/01/2007 | 05/01/2007 | 05/01/2007 | Yes | PRE-BAC | Accepted | Electronic | In Progress BO | Electronic | 2271: AGENCY TN: Happy,IDA B | View 2271 View TN | - Amend 2271 - 2271 Form - Term Notice |
| Locks, Lady Lovely | New | 2006 | 07/01/2006 | 06/30/2007 | | Yes | PRE-BAC | In-Progress Trainee | Electronic | | | 2271: Locks,Lady Lovely | View 2271 | - 2271 Form |
| Mermaid, Little | New | 2006 | 07/01/2006 | 06/30/2007 | | Yes | PRE-BAC | In-Progress PI | Electronic | | | 2271: Money,Cher D | View 2271 | - Process 2271 |
| Newbie, Ima | New | 2006 | 07/01/2008 | 06/30/2009 | | No | PRE-DOC | In-Progress PI | Electronic | | | 2271: Money,Cher D | View 2271 | - Process 2271 |

Appointment/Termination Source:
Paper or Electronic

Action:
2271 Form
Amend 2271
Initiate TN
Term Notice

| Application Trainee Name | Appointment Type | FY | Appointment | | Termination Date | End Date Past? | Degree Level | Appointment Status | Appointment Source | Termination Status | Termination Source | Current Reviewer | View | Action |
|---|---------------------|------|-------------|------------|---------------------|----------------------|-----------------|---|-----------------------|--------------------------|-----------------------|----------------------------|--|---|
| | | | Start Date | End Date | | | | | | | | | | |
| 5T32MH312008-04 (Budget Period: 07/01/2006-06/30/2007) Create New Appointment | | | | | | | | | | | | | | |
| Beaker, Kim Estry | New | 2006 | 07/01/2006 | 06/30/2007 | | Yes | PRE- DOC | Pending Agency Review | Electronic | | | 2271: AGENCY | View 2271 | - 2271 Form |
| Beauty, Sleeping | Reappointment | 2006 | 07/01/2006 | 06/30/2007 | 06/30/2007 | Yes | POST- DOC | Terminated | Electronic | Accepted | Electronic | 2271: AGENCY TN: AGENCY | View 2271 View TN View Payback | - 2271 Form - Term Notice |
| Boys, Beagle | | 2006 | 07/01/2006 | 06/30/2007 | | Yes | PRE- DOC | Accepted | Paper | | | | View 2271 | - Amend 2271 - Initiate TN |

**Appointment
Type:**
New
Reappointment
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

View:
View 2271
View TN
View
Payback

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

Electronic Research Administration
eRA Commons
 Sponsored by National Institutes of Health

Welcome radaroreilly
 Institution: EXT UAT DEMO CORP
 Authority: ASST

Version 2.15.1.2

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

My Grants

Select Delegator:

Delegator: Money, Cher D

Select Profile

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

My Grants

Select Delegator:

Delegator: Money, Cher D

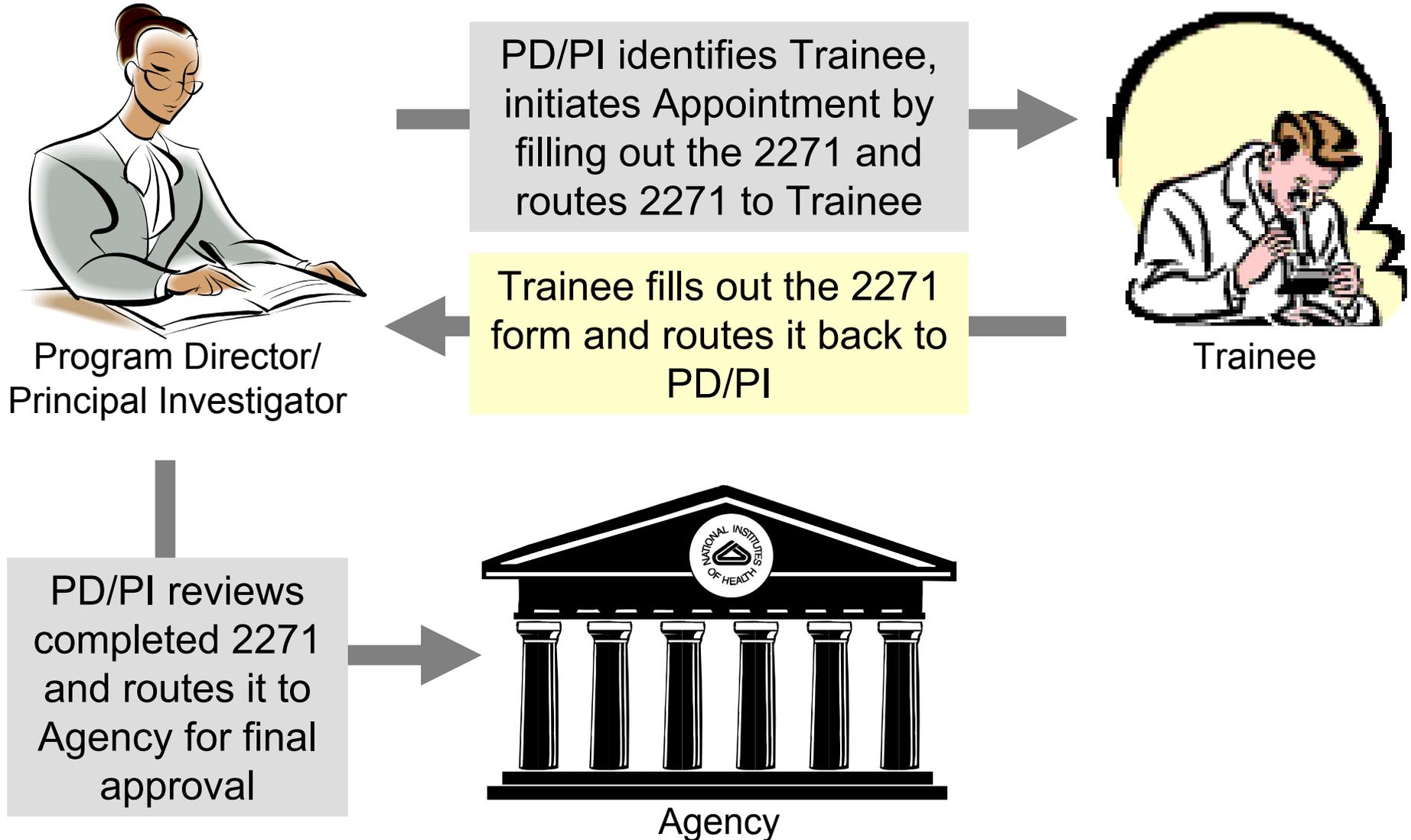
Select Profile

1 - 4 of 4 1

| 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 | View Trainee Roster |
| T32 DK 061298 | 04/01/2002 | 03/31/2009 | Money, Cher D | MOLECULAR MECHANISMS & NOVEL THERAPIES OF NEPHRON INJURY | View Trainee Roster |
| T32 MH 312008 | 07/01/2002 | 06/30/2008 | Money, Cher D | XTRAIN DEMO TRAINING GRANT | View Trainee Roster |
| T32 DK 065517 | 07/01/2004 | 06/30/2009 | Money, Cher D | RESEARCH TRAINING IN PEDIATRIC NEPHROLOGY | View Trainee Roster |



Trainee Appointments



Quick Reference: [http://era.nih.gov/files/xTrain Initiate Appointment.pdf](http://era.nih.gov/files/xTrain%20Initiate%20Appointment.pdf)

Create New Appointment

PI Trainee Roster screen

| Application | Appointment | FY | Appointment | | Termination | End | Degree | Appointment | Appointment | Termination | Termination | Current | View | Action |
|---|---------------|------|-------------|------------|-------------|------------|----------|---------------------------------------|-------------|--------------------------|-------------|----------------------------|--|---|
| Trainee Name | Type | | Start Date | End Date | Date | Date Past? | Level | Status | Source | Status | Source | Reviewer | | |
| 5T32MH312008-04 (Budget Period: 07/01/2006-06/30/2007) Create New Appointment | | | | | | | | | | | | | | |
| Beaker, Kim Estry | New | 2006 | 07/01/2006 | 06/30/2007 | | Yes | PRE-DOC | Pending Agency Review | Electronic | | | 2271: AGENCY | View 2271 | - 2271 Form |
| Beauty, Sleeping | Reappointment | 2006 | 07/01/2006 | 06/30/2007 | 06/30/2007 | Yes | POST-DOC | Terminated | Electronic | Accepted | Electronic | 2271: AGENCY TN: AGENCY | View 2271 View TN View Payback | - Term Notice |
| Boys, Beagle | | 2006 | 07/01/2006 | 06/30/2007 | | Yes | PRE-DOC | Accepted | Paper | | | | View 2271 | - Amend 2271 - Initiate TN |

Click **Create New Appointment**

Tip:
Be sure to note the budget period before creating appointment.

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](#)

Provide the Commons Username for the trainee and click **Continue**.

Statement of Training Appointment

Project Number: T32 MH 31 2008

Appointment Status:

Project Title: XTRAIN DEMO TRAINING GRANT

Institution: UNIVERSITY OF PENNSYLVANIA

PD 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 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: Newbie, Ima Brand

Address Line 1: 123 My Home Road

Address Line 2:

Address Line 3:

Address Line 4:

City, State, ZIP: My City, MD, 12345

Country: UNITED STATES

* **Email:** askera@mail.nih.gov

Phone: 555-123-4567

Fax:

| Degree(s) Earned/In Progress | Completion Date | Major/Minor | Degree Completed? |
|------------------------------|-----------------|-------------|-------------------|
| BS | 05/2003 | Biology/ | Y |
| MD | 05/2008 | / | Y |

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

* screen continues on next slide *

Create New Appointment

* screen continued from previous slide *

From Trainee Profile or Trainee Supplied
 PD/PI Supplied

Name of Specialty Boards (if applicable)
 Select Specialty Board Code

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 | Department | 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., biochemi | | | | | | |
| —Pediatric Oncology (7330) | | | | | | |

Period of Appointment

* From (MM/DD/YYYY) 7/1/2006

* To (MM/DD/YYYY) 7/1/2007

12 months 1 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 | 0 - 36,996 POST-DOC |
| * Stipend | 36996 |
| * Tuition/fees (estimated) | 12000 |
| * Travel | 1200 |
| Total | 50196 |

Save Cancel

Select Field of Training.

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.

Appointment can be saved for later action.



Create New Appointment

- Additional action buttons appear at the bottom of the form after the initial Save



- Once the form is ready, click ***Save & Route to Trainee***.
 - The system will check the form for errors prior to routing
 - Any identified errors must be corrected prior to routing
 - Warnings are addressed at your discretion

Create New Appointment

Provide Comments

Please enter comments below to send them by e-mail to the next recipient of this form.

Comments:

I have started the 2271 form needed for you Appointment. Please complete the remaining information and route it back to me. Give me a call 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.

Continue

Cancel

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.

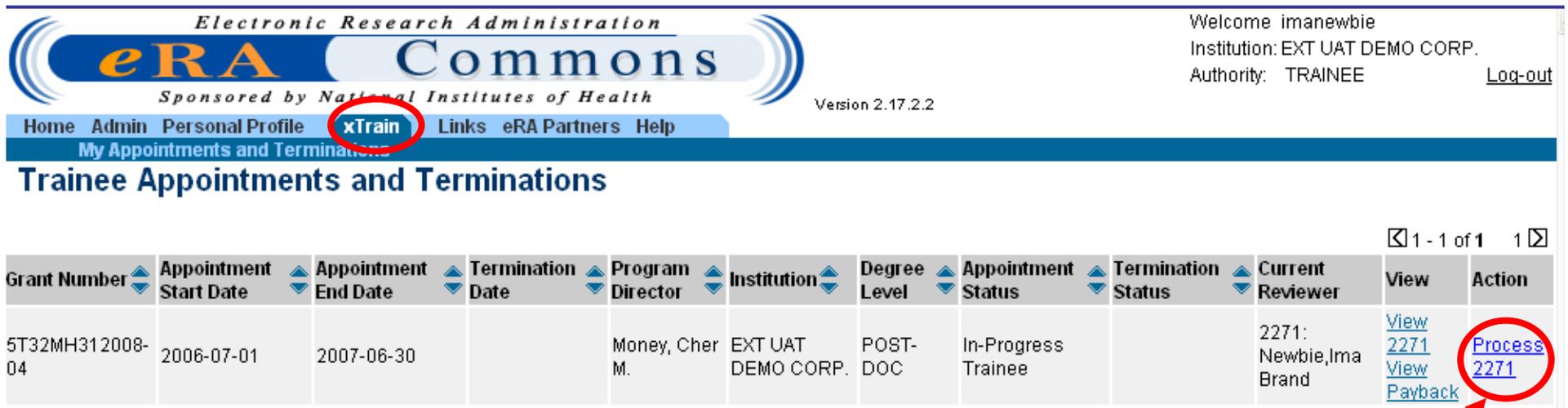
Done

| Application | Appointment Type | FY | Appointment | | Termination Date | End Date Past? | Degree Level | Appointment Status | Appointment Source | Termination Status | Termination Source | Current Reviewer | View | Action |
|---|------------------|------|-------------|------------|------------------|----------------|--------------|-------------------------------------|--------------------|--------------------|--------------------|-------------------------|--|-----------------------------|
| Trainee Name | | | Start Date | End Date | | | | | | | | | | |
| 5T32MH312008-04 (Budget Period: 07/01/2006-06/30/2007) Create New Appointment | | | | | | | | | | | | | | |
| Newbie, Ima Brand | New | 2006 | 07/01/2006 | 06/30/2007 | | Yes | POST DOC | In-Progress Trainee | Electronic | | | 2271: Newbie, Ima Brand | View 2271 View Payback | - 2271 Form |

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

Now the 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 imanewbie
 Institution: EXT UAT DEMO CORP.
 Authority: TRAINEE [Log-out](#)

Version 2.17.2.2

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

My Appointments and Terminations

Trainee Appointments and Terminations

☑ 1 - 1 of 1 1 ☒

| Grant Number | Appointment Start Date | Appointment End Date | Termination Date | Program Director | Institution | Degree Level | Appointment Status | Termination Status | Current Reviewer | View | Action |
|-----------------|------------------------|----------------------|------------------|------------------|--------------------|--------------|---------------------|--------------------|-------------------------|--|------------------------------|
| 5T32MH312008-04 | 2006-07-01 | 2007-06-30 | | Money, Cher M. | EXT UAT DEMO CORP. | POST-DOC | In-Progress Trainee | | 2271: Newbie, Ima Brand | View 2271 View Payback | Process 2271 |

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

Statement of Training Appointment

Project Number: T32 MH 31 2008

Appointment Status: In-Progress Trainee [View Routing History](#)

Project Title: XTRAIN DEMO TRAINING GRANT

Institution: UNIVERSITY OF PENNSYLVANIA

PD Name: Money, Cher D

The 2271 form is opened and pre-populated with information pulled from the Trainee profile or previously entered by PD/PI 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: Newbie, Ima Brand

SSN: 000001234

SSN – pulled from Profile/Personal Info; last 4 digits displayed

Address Line 1: 123 My Home Road

Address Line 2:

Address Line 3:

Address Line 4:

Address – pulled from Profile/Residential Address

City, State, ZIP: My City, MD, 12345

Country: UNITED STATES

* **Email:** askera@mail.nih.gov

Email – pulled from Profile/Personal Info

Phone: 555-123-4567

Fax:

| Degree(s) Earned/In Progress | Completion Date | Major/Minor | Degree Completed? |
|------------------------------|-----------------|-------------|-------------------|
| BS | 05/2003 | Biology/ | Y |
| MD | 05/2008 | / | Y |

Degrees – pulled from Profile/Degrees

Name of Specialty Boards (if applicable)

Select Specialty Board Code



Specialty Board – Select from pull-down list

* **Is the Trainee in a dual-degree program (e.g. M.D./Ph.D.)?**

No Yes

Dual-degree – Select appropriate radio button

From
Trainee
Profile or
Trainee
Supplied

PD/PI
Supplied

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

* screen continued from previous slide *

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

— Pediatric Oncology (7330)

Period of Appointment

* From (MM/DD/YYYY)

* To (MM/DD/YYYY)

months days

These values were used to select dates.

Support for Period of Appointment

| Type | Total for this Grant (Omit cents) |
|----------------------------|---|
| * Stipend Level | <input type="text" value="0 - 36,996 POST-DOC"/> <input type="button" value="v"/> |
| * Stipend | <input type="text" value="36996"/> |
| * Tuition/fees (estimated) | <input type="text" value="12000"/> |
| * Travel | <input type="text" value="1200"/> |
| Total | <input type="text" value="50196"/> |

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**.

- When the Trainee clicks the **Save & 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.

Statement of Training Appointment

Error Message

 Appointment validation errors:
- Trainee citizenship must be entered. Trainee must enter this information on Personal Profile screen in eRA Commons.
(ID: 200014)

Project Number: T32 MH 312008

Appointment Status: In-Progress Trainee [View Routing History](#)

Project Title: XTRAIN DEMO TRAINING GRANT

Institution: UNIVERSITY OF PENNSYLVANIA

PD Name: Money, Cher D

A light blue sticky note with a teal pushpin at the top right corner. The text on the note is in a black, handwritten-style font.

Tip:
Keep your
Commons Profile
current to avoid
errors/warnings.

Provide Comments

Please enter comments below to send them by e-mail to the next recipient of this form.

Comments:

I believe I have included all the necessary informatin. I look forward to this opportunity.

Ima Newbie

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

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.

Electronic Signature recorded.

Route to PI Confirmation

The 2271 Form was successfully routed and Email about this action was sent to 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 | Current Reviewer | View | Action |
|------------------|------------------------|----------------------|------------------|------------------|--------------------|--------------|-----------------------|--------------------|--------------------|---|---------------------------|
| 5T32MH31 2008-04 | 2006-07-01 | 2007-06-30 | | Money, Cher M. | EXT UAT DEMO CORP. | POST-DOC | In-Progress PI | | 2271: Money,Cher D | View 2271 View Payback | 2271 Form |

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

- 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 | | Termination Date | End Date Past? | Degree Level | Appointment Status | Appointment Source | Termination Status | Termination Source | Current Reviewer | View | Action |
|---|------------------|------|-------------|------------|------------------|----------------|--------------|--------------------------------|--------------------|--------------------|--------------------|--------------------|---|--------------------------------|
| | | | Start Date | End Date | | | | | | | | | | |
| 5T32MH312008-04 (Budget Period: 07/01/2006-06/30/2007) Create New Appointment | | | | | | | | | | | | | | |
| Newbie, Ima Brand | New | 2006 | 07/01/2006 | 06/30/2007 | | Yes | POST-DOC | In-Progress PI | Electronic | | | 2271: Money,Cher D | View 2271 View Payback | - Process 2271 |

Bottom of 2271 form

| | |
|----------------------------|------------------------------------|
| * Stipend | <input type="text" value="36996"/> |
| * Tuition/fees (estimated) | <input type="text" value="12000"/> |
| * Travel | <input type="text" value="1200"/> |
| Total | <input type="text" value="50196"/> |

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

Provide Comments

Please enter comments below to send them by e-mail to the next recipient of this form.

Comments:

I am submitting Ima Newbie's Appointment form. She is a wonderful addition to our program. Let me know if you have any questions.

Cher D. Money

Click **Continue**.

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.

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](#)

Post-doc Appointments may require signed paper Payback Agreement for legal purposes.

Electronic Signature recorded; Status is set to **Pending Agency Review**.

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

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



New Appointment

- For Pre-doc Appointments
 - No further action is needed, unless confirmation of permanent residency status is required
- For Post-doc Appointments who have never received prior Kirschstein-NRSA support Only
 - Mail signed original Payback Agreement (6031) form to the awarding NIH Institute
 - Mail confirmation of permanent residency (if needed)

Important Note: Reflects change in Post-doc paperwork requirements as of 06/2008. xTrain currently indicates all Post-doc forms inc. 2271 and Termination Notices must be mailed, but will align with new policy soon.



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
- Follows same process as Appointments

| | | | | | | | | | | |
|--------------|------|------------|------------|-----|---------|--------------------------|-------|---------------------------|------------------------------|-----------------------------|
| Boys, Beagle | 2006 | 07/01/2006 | 06/30/2007 | Yes | PRE-DOC | Accepted | Paper | View 2271 | - Amend 2271 | Initiate IN |
|--------------|------|------------|------------|-----|---------|--------------------------|-------|---------------------------|------------------------------|-----------------------------|

| | | | | |
|--|--|--|--|-----------------------------------|
| <p>22. CERTIFICATION AND ACCEPTANCE: 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.</p> | | | <p>(a) SIGNATURE OF APPOINTEE</p> <p>Electronically certified via eRA eTrain system by Trainee</p> | <p>(b) DATE</p> <p>11/28/2007</p> |
| <p>23. 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.</p> | | | <p>(a) SIGNATURE OF PROGRAM DIRECTOR</p> <p>Electronically certified via eRA eTrain system by PI</p> | <p>(b) DATE</p> <p>11/28/2007</p> |
| <p>(c) TYPED NAME OF PROGRAM DIRECTOR</p> | | | <p>Money, Char D</p> | |
| <p>(d) INSTITUTION'S NAME, ADDRESS, AND PHONE NO. (Street, city, state, zip code)</p> | | | <p>EXT UAT DEMO CORP. 1213 UAT DEMO CORP. BETHESDA, MD 20892 Phone :301-111-1234</p> | |

RHS 2271 Page 2 of 2

The **View 2271** link for the **Amendment** shows the original 2271 (as it was submitted) with an Amendment section appended at the end.

Bottom of original 2271 form

New Amendment section

AMENDMENT

| Field Name | Original Value | Amended Value |
|-----------------------------------|-------------------------|-------------------------|
| Period of Appointment | 07/01/2007 - 08/30/2008 | 07/01/2007 - 08/30/2008 |
| SUPPORT FOR PERIOD OF APPOINTMENT | | |
| Spesnd | \$20772 | \$14887 |
| Trainee Signed Date | 11/28/2007 | |
| PD Signed Date | 11/28/2007 | 03/07/2008 |

RHS 2271 Page 3 of 3 continued



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.

| | | | | | | | | | | | | | | |
|------------|-----|------|------------|------------|------------|-----|---------|--------------------------|------------|---|------------|-------------------------------------|--|---|
| King, Lion | New | 2005 | 07/01/2005 | 04/30/2006 | 04/30/2006 | Yes | PRE-DOC | Accepted | Electronic | In Progress BO | Electronic | 2271: AGENCY TN: TexBo52,Bo52 | View 2271 View TN | - Amend 2271 - Re-Appoint 2271 - 2271 Form - Term Notice |
|------------|-----|------|------------|------------|------------|-----|---------|--------------------------|------------|---|------------|-------------------------------------|--|---|



Routing History

- The View Routing History link is available throughout many of the xTrain processes
 - Provides event history including routing comments
 - Accessed from within forms or from Appointment/Termination Status

Routing History

Project Number: T32 MH 312008
Appointment Status: Pending Agency Review
Project Title: XTRAIN DEMO TRAINING GRANT
Institution: UNIVERSITY OF PENNSYLVANIA
PD Name: Money, Cher D
Trainee Name: Newbie, Ima Brand

Statement of Training Appointment

Project Number: T32 MH 312008
Appointment Status: Pending Agency Review [View Routing History](#)
Project Title: XTRAIN DEMO TRAINING GRANT
Institution: UNIVERSITY OF PENNSYLVANIA
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 | Money, Cher | 06/05/2008 06:36 PM | Initiated by PI | In-Progress PI | Money, Cher | |
| PI Routes 2271 to Trainee | Money, Cher | 06/05/2008 07:07 PM | Routed to Trainee | In-Progress Trainee | Newbie, Ima | I have started the 2271 form needed for you Appointment. Please complete the remaining information and route it back to me. Give me a call if you have any questions. -Cher D. Money |
| Trainee Routes 2271 to PI | Newbie, Ima | 06/05/2008 07:43 PM | Routed to PI | In-Progress PI | Money, Cher | I believe I have included all the necessary informatin. I look forward to this opportunity. Ima Newbie |
| PI Submits 2271 to Agency | Money, Cher | 06/05/2008 07:56 PM | Submitted to Agency | Pending Agency Review | AGENCY | I am submitting Ima Newbie's Appointment form. She is a wonderful addition to our program. Let me know if you have any questions. Cher D. Money |
| PI Submits 2271 to Agency | Money, Cher | 06/05/2008 07:56 PM | Submitted to Agency | Pending Agency Review | AGENCY | I am submitting Ima Newbie's Appointment form. She is a wonderful addition to our program. Let me know if you have any questions. Cher D. Money |



View 2271

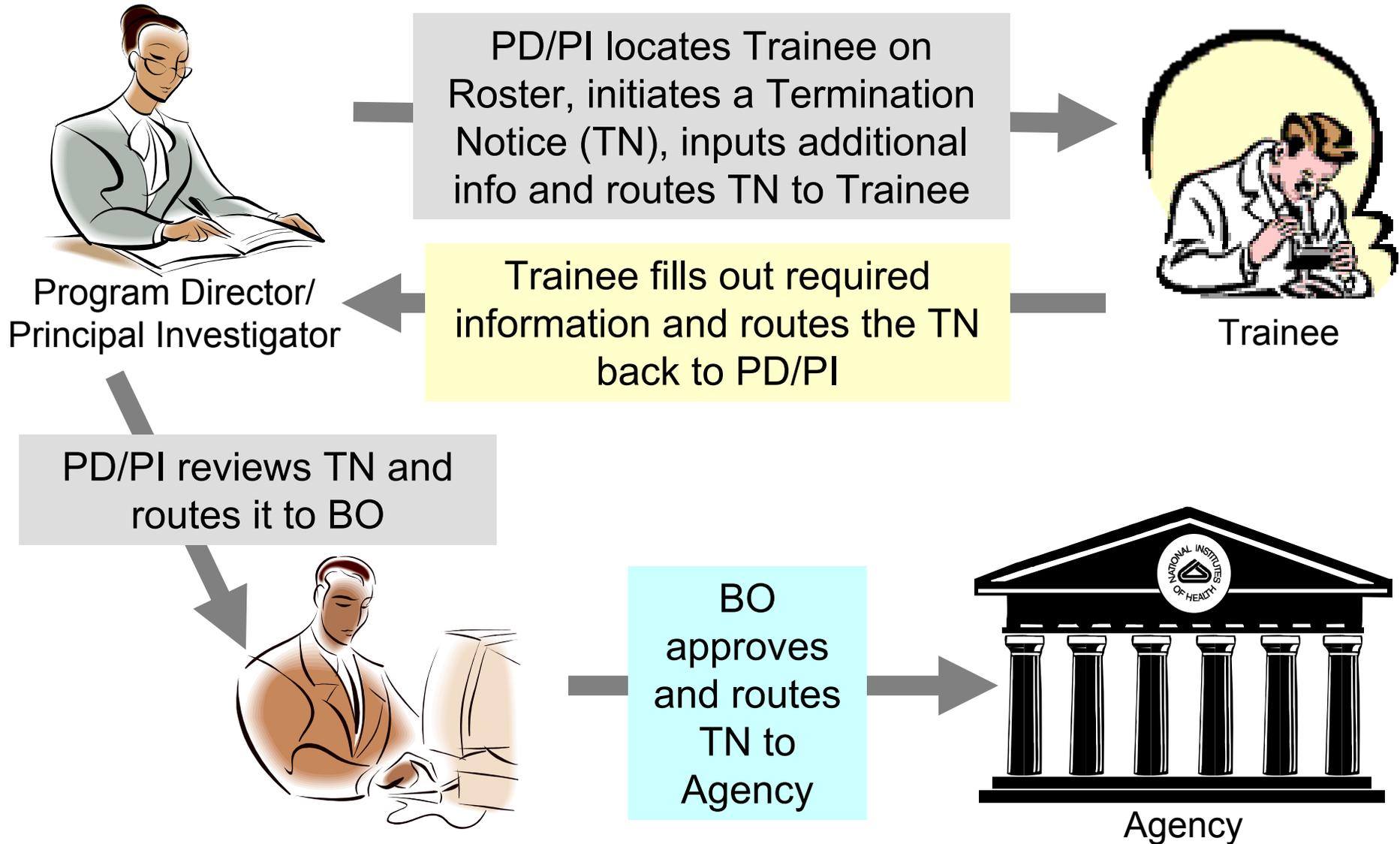
| Application Trainee Name | Appointment Type | FY | Appointment | | Termination Date | End Date Past? | Degree Level | Appointment Status | Appointment Source | Termination Status | Termination Source | View | Action |
|---|---------------------|------|-------------|------------|---------------------|----------------------|-----------------|---|----------------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

- 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



Quick Reference: http://era.nih.gov/files/xTrain_Initiate_Termination.pdf

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

PI Trainee Roster screen

| | | | | | | | | | | | | | | | |
|---------------|--|------|------------|------------|--|-----|----------|--------------------------|-------|--|--|--|--|--|--|
| Dale, Chip N. | | 2003 | 07/01/2003 | 03/31/2004 | | Yes | POST-DOC | Accepted | Paper | | | | | View 2271 View Payback | - Amend 2271 - Re-Appoint 2271 - Initiate TN |
|---------------|--|------|------------|------------|--|-----|----------|--------------------------|-------|--|--|--|--|--|--|

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



Termination Notice

Termination Notice (form 416-7)

Termination Notice - Ruth L. Kirschstein National Research Service Award

Project Number: T32 MH 312008

Termination Status:

Project Title: XTRAIN DEMO TRAINING GRANT

Institution: UNIVERSITY OF PENNSYLVANIA

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 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: Dale, Chip N.

Address Line 1: Acorn lane

Address Line 2: Dr 2

Address Line 3: Lane 99

Address Line 4:

City, State, ZIP: Acorn, IN, 23121

Country: UNITED STATES

* **Email:** eRAStage@mail.nih.gov

Phone: 1564454445

Fax:

| Degree(s) Earned/In Progress | Completion Date | Major/Minor | Degree Completed? |
|------------------------------|-----------------|-------------|-------------------|
| BA | 03/2004 | / | Y |
| MD | 06/2011 | / | N |

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

* screen continued on next slide *

* screen continued from previous slide *

Termination Date and Business Official submitting the Termination Notice to NIH

Termination Date: 03/15/2004 *Business Official: Happy, IDA

Total Kirschstein - NRSA Support Under This Award

| Support Year | Start Date | End Date | * Amount of Stipend | Standard Stipend Amount | Num Months |
|----------------|------------|------------|---------------------|-------------------------|------------|
| Year 1 | 06/29/2003 | 03/31/2004 | 24225.0 | 25,935.00 | 9 |
| Totals: | | | 24225.00 | | |

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 is terminated early, state reason.* (2000 characters maximum)

- OR -

Upload PDF File

Post Award Information

| Activity | Organization | Type of Position |
|--|--|--|
| <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 Researcher |
| <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"/> |

*Business Official:

Happy, IDA

Happy, IDA

Happy, IDA

Marlow, Jennifer

Tarlek, Herb

Choose a BO from drop-down list.

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

03/15/2004

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 *



PD/PI

Termination Notice

* 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 contact the eRA HelpDesk.

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

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

The majority of information requested is entered by the Trainee.

PD/PI **Saves** the form.

Additional action buttons will appear; click **Save & Route to Trainee** Status changes to **In Progress Trainee**.

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:

I have enjoyed your participation with our training program. Please complete this Termination Notice and route it back to me to close out your Appointment.

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

| | | | | | | | | | | | | |
|---------------|-----------------|------------|------------|-----|----------|--------------------------|-------|-------------------------------------|------------|-------------------|--|--|
| Dale, Chip N. | 2003 07/01/2003 | 03/31/2004 | 03/15/2004 | Yes | POST-DOC | Accepted | Paper | In Progress Trainee | Electronic | TN: Dale, Chip N. | View 2271 View TN View Payback | - Amend 2271 - Re-Appoint 2271 - Term Notice |
|---------------|-----------------|------------|------------|-----|----------|--------------------------|-------|-------------------------------------|------------|-------------------|--|--|

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

Trainee Appointments and Terminations

☑ 1 - 1 of 1 1 ☑

| Grant Number | Appointment Start Date | Appointment End Date | Termination Date | Program Director | Institution | Degree Level | Appointment Status | Termination Status | Current Reviewer | View | Action |
|-------------------|------------------------|----------------------|------------------|------------------|--------------------|--------------|--------------------|---------------------|-------------------|--|----------------------------|
| 1T32MH312008-01A1 | 2003-07-01 | 2004-03-31 | 2004-03-15 | Money, Cher M. | EXT UAT DEMO CORP. | POST-DOC | Accepted | In Progress Trainee | TN: Dale, Chip N. | View 2271 View TN View Payback | Process TN |

Termination Notice - Ruth L. Kirschstein National Research Service Award

Project Number: T32 MH 312008

Termination Status: In Progress Trainee [View Routing History](#)

Project Title: XTRAIN DEMO TRAINING GRANT

Institution: UNIVERSITY OF PENNSYLVANIA

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 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: Dale, Chip N.

SSN: 000005555

Address Line 1: Acorn lane

Address Line 2: Dr 2

Address Line 3: Lane 99

Address Line 4:

City, State, ZIP: Acorn, IN, 23121

Country: UNITED STATES

* **Email:** eRAStage@mail.nih.gov

Phone: 1564454445

Fax:

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

* screen continued on next slide *

* screen continued from previous slide *

| Degree(s) Earned/In Progress | Completion Date | Major/Minor | Degree Completed? |
|------------------------------|-----------------|-------------|-------------------|
| BA | 03/2004 | / | Y |
| MD | 06/2011 | / | N |

Termination Date and Business Official submitting the Termination Notice to NIH

Termination Date: 03/15/2004 Business Official: Happy, IDA

Total Kirschstein - NRSA Support Under This Award

| Support Year | Start Date | End Date | Amount of Stipend | Standard Stipend Amount | Number of | |
|----------------|------------|------------|-------------------|-------------------------|-----------|------|
| | | | | | Months | Days |
| Year 1 | 07/01/2003 | 03/31/2004 | 24225.0 | 25,650.00 | 9 | 0 |
| Totals: | | | 24225.00 | | | |

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 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 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"/> |

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 *



Termination Notice

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

* screen continued from previous slide *

Position Title:

Field:

Name of Organization:

City:

State:

Phone No:

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

Mailing Address after Termination of this Kirschstein-NRSA Support

* Street:

* City:

* State:

* ZIP:

* Phone No:

* Email:

Provide mailing address where you can be reached after Termination.

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 contact the eRA HelpDesk.

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

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

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

Save Cancel Reset **Save & Route to PI** View PDF

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:

I believe I have completed all the needed info. Thank you again for this opportunity. It was terrific.

Chip N Dale

Click **Continue** button.

Electronic Signature recorded.

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

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

Trainee Appointments and Terminations screen

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

| Grant Number | Appointment Start Date | Appointment End Date | Termination Date | Program Director | Institution | Degree Level | Appointment Status | Termination Status | Current Reviewer | View | Action |
|-------------------|------------------------|----------------------|------------------|------------------|--------------------|--------------|--------------------|-----------------------|------------------|--|-----------------------------|
| 1T32MH312008-01A1 | 2003-07-01 | 2004-03-31 | 2004-03-15 | Money, Cher M. | EXT UAT DEMO CORP. | POST-DOC | Accepted | In Progress PI | TN: Money,Cher D | View 2271 View TN View Payback | Term Notice |

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

PI Trainee Roster screen

| | | | | | | | | | | | | |
|---------------|------|------------|------------|------------|-----|----------|--------------------------|-------|--------------------------------|------------|------------------|---|
| Dale, Chip N. | 2003 | 07/01/2003 | 03/31/2004 | 03/15/2004 | Yes | POST-DOC | Accepted | Paper | In Progress PI | Electronic | TN: Money,Cher D | View 2271 View TN View Payback - Amend 2271 - Re-Appoint 2271 - Process TN |
|---------------|------|------------|------------|------------|-----|----------|--------------------------|-------|--------------------------------|------------|------------------|---|

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 contact the eRA HelpDesk.

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

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

Select the **Save & Route to 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:

Chip N Dale is no longer with our training program. Here is the Termination Notice.

Cher D Money

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

Click **Continue** button.

Termination Notice Certification

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

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.

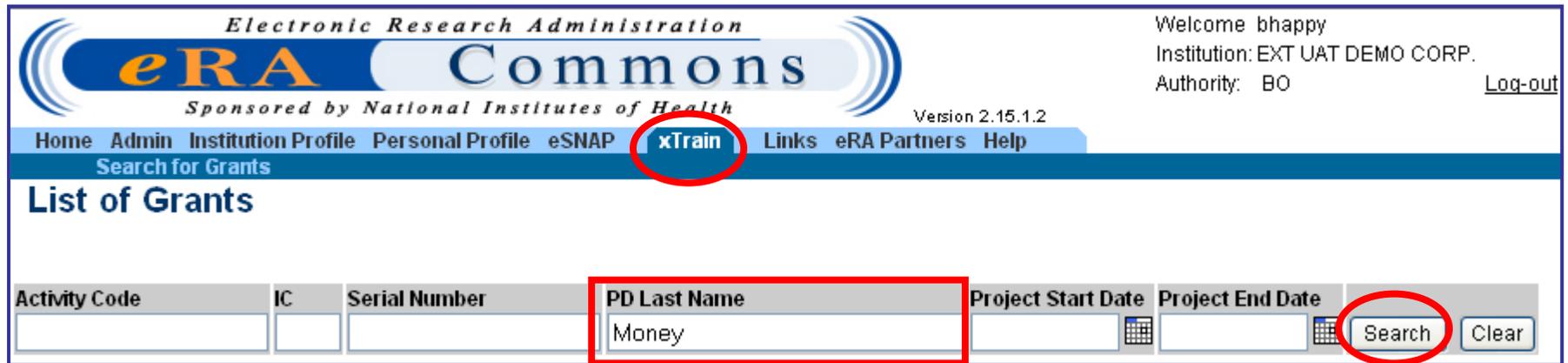
PI Trainee Roster screen

| | | | | | | | | | | | | |
|---------------|-----------------|------------|------------|-----|----------|--------------------------|-------|--------------------------------|------------|-----------------|--|--|
| Dale, Chip N. | 2003 07/01/2003 | 03/31/2004 | 03/15/2004 | Yes | POST-DOC | Accepted | Paper | In Progress BO | Electronic | TN: Happy,IDA B | View 2271 View TN View Payback | - Amend 2271 - Re-Appoint 2271 - Term Notice |
|---------------|-----------------|------------|------------|-----|----------|--------------------------|-------|--------------------------------|------------|-----------------|--|--|

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

Termination Notice

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



Electronic Research Administration
eRA Commons
 Sponsored by National Institutes of Health
 Version 2.15.1.2

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

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

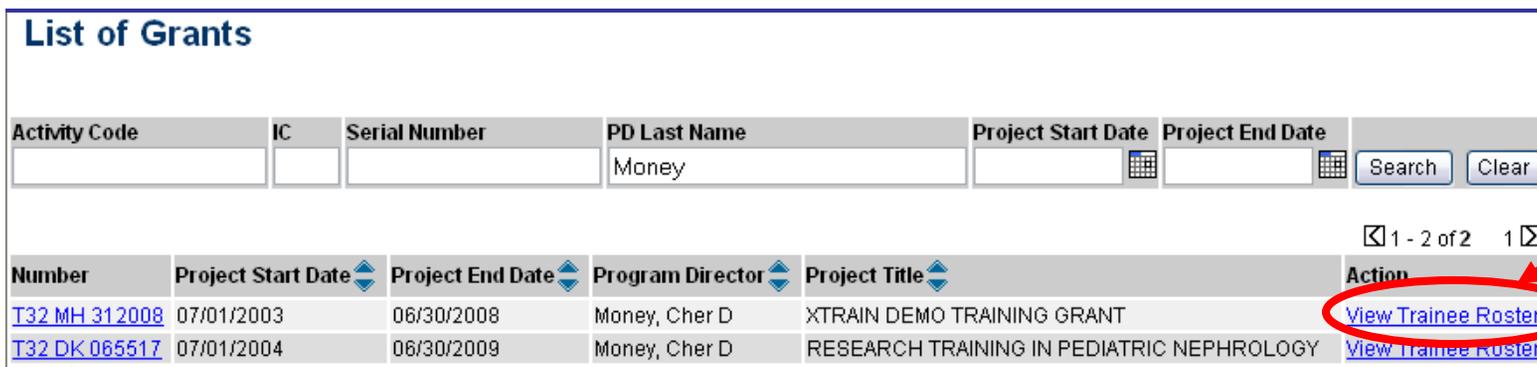
Search for Grants

List of Grants

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

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

BO Trainee Roster



List of Grants

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

☑ 1 - 2 of 2 1 ☑

| Number | Project Start Date | Project End Date | Program Director | Project Title | Action |
|-------------------------------|--------------------|------------------|------------------|---|-------------------------------------|
| T32 MH 312008 | 07/01/2003 | 06/30/2008 | Money, Cher D | XTRAIN DEMO TRAINING GRANT | View Trainee Roster |
| T32 DK 065517 | 07/01/2004 | 06/30/2009 | Money, Cher D | RESEARCH TRAINING IN PEDIATRIC NEPHROLOGY | View Trainee Roster |

Select the **View Trainee Roster** link.



Termination Notice

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

BO Trainee Roster screen

Select the **Process TN** link.

| Application | Appointment Type | FY | Appointment | | Termination Date | End Date Past? | Degree Level | Appointment Status | Appointment Source | Termination Status | Termination Source | Current Reviewer | View | Action |
|--|------------------|------|-------------|------------|------------------|----------------|--------------|--------------------------|--------------------|--------------------------------|--------------------|--------------------|--|------------------------------|
| Trainee Name | | | Start Date | End Date | | | | | | | | | | |
| 1T32MH312008-01A1 (Budget Period: 07/01/2003-06/30/2004) | | | | | | | | | | | | | | |
| Dale, Chip N. | | 2003 | 07/01/2003 | 03/31/2004 | 03/15/2004 | Yes | POST-DOC | Accepted | Paper | In Progress BO | Electronic | TN: Happy,IDA B | View 2271 View TN View Payback | - Process TN |

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 contact the eRA HelpDesk.

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

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

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

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 Chip N Dale reflects the new March 15 termination date. Let me know if you have questions.

Cher D. Money

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

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.

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.

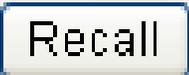
BO Trainee Roster screen

| | | | | | | | | | | | | | |
|---------------|--|-----------------|------------|------------|-----|----------|--------------------------|-------|---------------------------------------|------------|------------|---|-------------------------------|
| Dale, Chip N. | | 2003 07/01/2003 | 03/31/2004 | 03/15/2004 | Yes | POST-DOC | Accepted | Paper | Pending Agency Review | Electronic | TN: AGENCY | View 2271 View TN View Payback | - Term Notice |
|---------------|--|-----------------|------------|------------|-----|----------|--------------------------|-------|---------------------------------------|------------|------------|---|-------------------------------|

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



Additional Actions

- Some actions are available to a user, who is not the Current Reviewer, as long as the form has not been submitted to Agency
 -  – runs validations & gives errors/warnings
 -  – the previous reviewer can recall a form from the current reviewer
- Accessed via **2271 Form** or **Term Notice** links

PI Trainee Roster screen

Current Reviewer- Trainee/Kim Beaker

| Application Trainee Name | Appointment Type | FY | Appointment | | Termination Date | End Date Past? | Degree Level | Appointment Status | Appointment Source | Termination Status | Termination Source | Current Reviewer | View | Action |
|---|------------------|------|-------------|------------|------------------|----------------|--------------|-------------------------------------|--------------------|--------------------|--------------------|-------------------------|---------------------------|-----------------------------|
| | | | Start Date | End Date | | | | | | | | | | |
| 5T32MH312008-04 (Budget Period: 07/01/2006-06/30/2007) Create New Appointment | | | | | | | | | | | | | | |
| Beaker, Kim Estry | New | 2006 | 07/01/2006 | 06/30/2007 | | Yes | PRE-DOC | In-Progress Trainee | Electronic | | | 2271: Beaker, Kim Estry | View 2271 | - 2271 Form |

2271 Form or Term Notice



View TN & View PDF

| Application | Appointment | FY | Appointment | | Termination | End Date | Degree | Appointment | Appointment | Termination | Termination | View | Action |
|--|-------------|------|-------------|------------|-------------|----------|---------|--------------------------|-------------|---------------------------------------|-------------|--|--------|
| Trainee Name | Type | | Start Date | End Date | Date | Past? | Level | Status | Source | Status | Source | | |
| 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 | View 2371 View TN | |

- 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.

Department of Health and Human Services
Public Health Service
Ruth L. Kirschstein National Research Service Award
Termination Notice

1. NAME OF FELLOW OR TRAINEE (Last, first, middle)
Beaker, Kim Estry

2. FELLOWSHIP OR TRAINING GRANT NO.
5T32DK065517-04

3. NAME OF SPONSORING INSTITUTION
EXT. UAT DEMO CORP.

4. SOCIAL SECURITY NO.
XXXX-XX-XXXX

5. DATES OF KIRSCHSTEIN-NRSA SUPPORT UNDER THIS AWARD (Month, day, year) FROM: 07/01/2007 TO: 06/30/2008

6. DATES OF KIRSCHSTEIN-NRSA SUPPORT RECEIVED AND NUMBER OF MONTHS SUPPORTED UNDER THIS AWARD (See specific instructions for Award of Support)

| YEAR OF SUPPORT | AMOUNT OF SPEND | NUMBER OF Months, Days | YEAR OF SUPPORT | AMOUNT OF SPEND | NUMBER OF Months, Days |
|-----------------|-----------------|------------------------|-----------------|-----------------|------------------------|
| YEAR 4 | 16,617.60 | 12 0 | TOTALS | 16,617.60 | |

8. Provide a summary of training received and research undertaken during fellowship or trainee tenure. List publications, if any, resulting from the research during this period. List grants and career awards pending and received. If fellowship or training appointment is being terminated early, state reason.

9. See attached document

10. POST-AWARD INFORMATION: Complete each below

| Activity | Organization | Type of Position | 10a. MAILING ADDRESS AFTER TERMINATION OF THIS KIRSCHSTEIN-NRSA SUPPORT (Street, city, state, zip code) |
|--|---|---|---|
| <input type="checkbox"/> Teaching <input checked="" type="checkbox"/> Research <input type="checkbox"/> Administration <input type="checkbox"/> Other | <input type="checkbox"/> Academic <input type="checkbox"/> For-profit <input type="checkbox"/> Not For-Profit <input type="checkbox"/> Other | <input type="checkbox"/> Grad Student <input type="checkbox"/> Postdoctoral Researcher <input type="checkbox"/> Faculty - Tenure-Track <input type="checkbox"/> Career Scientist <input type="checkbox"/> Other | 123 Park Place, San Francisco, CA, 94102 |

11. TEL. NO.: 555-123-4444

12. SIGNATURE OF FELLOW OR TRAINEE (See specific instructions)
Electronically certified via eRA xTrain system by Trainee

13. Certification of Sponsor or Program Director: that to the best of my knowledge all the above information is correct.

| SIGNATURE OF SPONSOR OR PROGRAM DIRECTOR | DATE | TYPED NAME OF SPONSOR OR PROGRAM DIRECTOR |
|--|------------|---|
| Electronically certified via eRA xTrain system by PI | 05/10/2008 | Money, Cher |

14. Business Office's Verification of Items 8 and 7. (Not applicable to Individual fellows at Federal or foreign Institutions.)

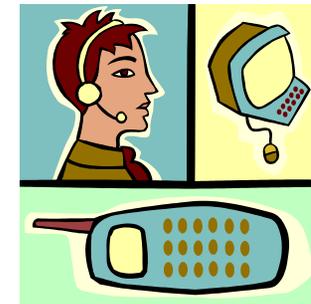
| SIGNATURE | DATE | TYPED NAME OF BUSINESS | TEL. |
|-----------|------|------------------------|------|
| | | | |

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

- 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
 - 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.