xTrain for Institution Users

March 2012

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xTrain Basics

What is xTrain?

- **xTrain is part of eRA Commons, an online application that allows both grantees and Federal staff to access and share administrative grant information**

- **xTrain allows Institution users to electronically prepare (enter data), route and submit Appointments Re-appointments, Amendments, and Termination Notices**

- **xTrain allows users to track the status of Appointments and Termination Notices**

- **xTrain is also used by Agency grants management staff to process Appointments and Termination Notices submitted electronically**

Does xTrain have to be used?

- **Yes – effective January 1, 2011, Institutions <u>must</u> use xTrain to submit Appointments and Terminations electronically for activity codes noted in NIH Guide Notice NOT-OD-11-026, this <u>http://grants.nih.gov/grants/guide/notice-files/NOT-OD-11-026.html</u>**

- **Paper submissions will not be accepted**

xTrain supports the following Activity Codes -

For Appointments:

- Appointments of Trainees to Institutional Ruth L. Kirschstein-National Service Research Award (Kirschstein-NRSA) programs: T32, T34, T35, T90, TL1, and TU2

- Appointments of Trainees to *non-NRSA* institutional research training programs: NLM's T15 only for NIH

- Appointments of scholars to institutional career development awards: KL2, K12 and KM1

- Appointments of individual participants to research education awards: R25 and R90

- Appointments of Trainees to CDC grants: T01, T02, T03, T15, T42

For Termination Notices:

- xTrain supports the termination of Appointments to institutional research training programs (except T34); the termination of fellowship awards to Kirschstein-NRSA fellowships (i.e., F30, F31, F32, F33); and the termination of scholars and participants.

Activity Codes Supported

For research education awards (R25, R90) and institutional career development awards (K12, KL2, KM1):

- – The NIH awarding IC determines if the program requires the use of the PHS 2271 Statement of Appointment and/or PHS 416-7 Termination Notice. When these forms are used, the grantee is required to submit the forms via xTrain.

xTrain Users

- An eRA Commons account is needed to use xTrain

- The xTrain functions available to users are based on the "roles" associated with their accounts
  - Sometimes 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 for institutional research training programs

- Program Director/Principal Investigator (PD/PI; PI role)
  - Responsible for overall direction of the training program
    - If a multi-PI, can perform the same actions as the Contact PI
  - Selects and Appoints Trainees, Amends Appointments (when necessary), and initiates Termination Notices
  - Also refers to individuals that have applied for or received individual fellowship awards

- 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 PD/PI except for the ability to submit Appointments to Agency
  - Does not assist a Fellow

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 research training grant
  - Scholar on a career development award
  - Participant on a research education award
- Sponsor: Person at a grantee Institution who mentors Fellows
- Sponsor Delegate: Person who assists the Sponsor in performing duties, except for submission

- eRA Commons users with the **Signing Official (SO)**, **Administrative Official (AO)**, or **Accounts Administrator (AA)** role can create accounts with BO, PI, Sponsor or ASST roles or they can add these roles to existing accounts
  - Seek out these individuals for assistance with your account set-up

- To facilitate appointment-making through xTrain, NIH recommends that Institutions routinely establish eRA Commons accounts for training-grant-eligible students and post-doctorates

- Trainees without eRA Commons accounts can also be registered as part of the xTrain Appointment or Termination processes

Trainee Account Set-up
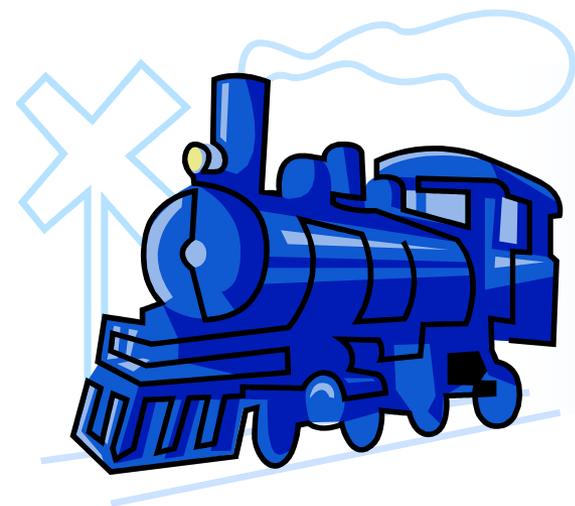
Inviting a Trainee to Register

PD/PI

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

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

Continue   Cancel

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

eRA *PD/PI*

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.
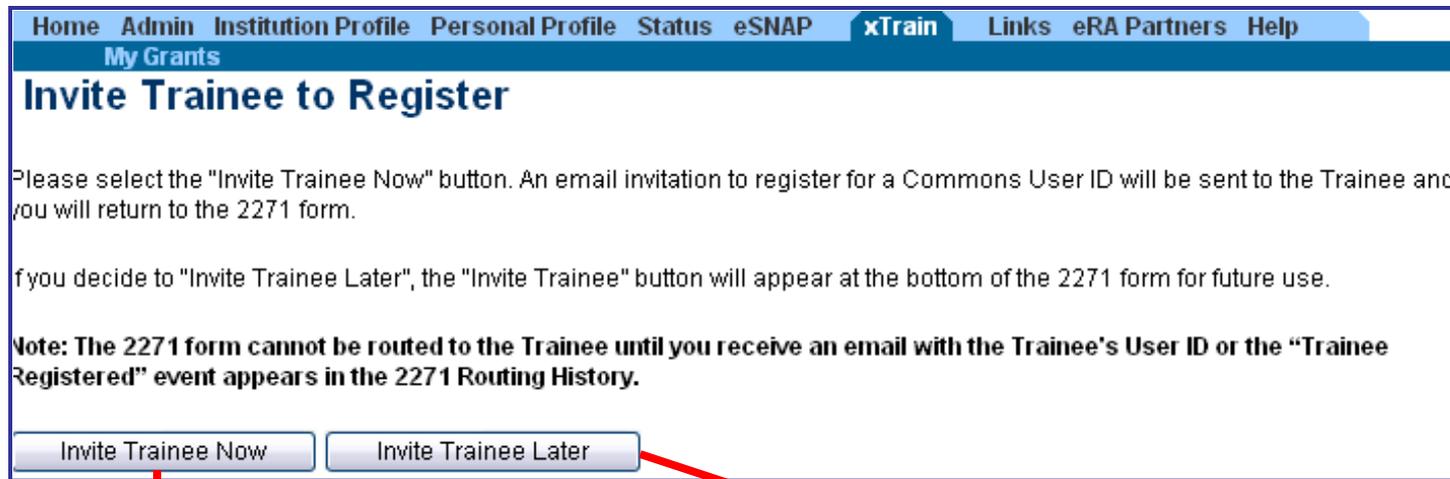
* Required

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

Continue   Cancel

Complete info; click **Continue**.

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

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

My Grants

Invite Trainee to Register

Please select the "Invite Trainee Now" button. An email invitation to register for a Commons User ID will be sent to the Trainee and you will return to the 2271 form.

If you decide to "Invite Trainee Later", the "Invite Trainee" button will appear at the bottom of the 2271 form for future use.

Note: The 2271 form cannot be routed to the Trainee until you receive an email with the Trainee's User ID or the "Trainee Registered" event appears in the 2271 Routing History.

[Invite Trainee Now]   [Invite Trainee Later]

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]

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Inviting a Trainee to Register

- For Trainees who do not yet have eRA Commons accounts because their previous Appointments were submitted on paper, other xTrain actions (e.g., Re-appointments, Amendments, Terminations) also provide an opportunity to register the Trainees
  - Once forms are initiated and saved, the **Invite Trainee to Register** screen is displayed when an eRA 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.

Trainee

- Trainees should respond to the xTrain "Create an Account" registration invitation as soon as possible to avoid processing delays
  - Click 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

Create a New Account

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 t[...]cal records to your new NIH Commons account. You will be notified by two emails when your account is activated. One email wi[...]ur temporary password. You will be asked to change your temporary password once you login.

Account Form

User Name * ImaNewbie   User Name must be at least 6 characters

Phone * 301 555 1234

E-mail * askera@mail.nih.gov

First Name | Middle Name | Last Name *
Ima | Brand | Newbie

Organization

* 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.

mm dd yyyy   (123456789)

Birth Date [ ] / [ ] / [ ]   SSN [ ]

Save   Reset   Cancel

Step **1** of 3

Complete form and click *Save*.

Trainee

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

Verify NIH Support for Betty Grable ❓

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

Principal Investigator - Funded Applications for which you participated as the Principal Investigator

Confirm Your NIH Support	PI Name	Grant	Project Title	Project Start Date

Committee Involvement - Committees in which you are serving or have served that are not Special Emphasis Panels

Confirm Your Committee Involvement	Committee Member Name	Committee Abbreviation	Committee Title	Start Date	End Date

Training - Funded Applications for which you participated as a trainee

Confirm Your Trainee Assignments	Trainee Name	PI Name	Grant	Project Title	Project Start Date

Comments for NIH

I have not had previous NIH support, committee involvement or training

[Continue Account Request] [Reject Account Request] [Add NIH Support]

Step **2** of 3

Click *Complete Account Request.*

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

Complete Account Request

Principal Investigator - Funded Applications for which you participated as the Principal Investigator

PI Name	Grant	Project Title	Project Start Date

Committee Involvement - Committees in which you are serving or have served that are not Special Emphasis Panels

Committee Member Name	Committee	Committee Title	Start Date	End Date

Training - Funded Applications for which you participated as a trainee

Trainee Name	PI Name	Grant	Project Title	Project Start Date

Comments for NIH

I have not had previous NIH support, committee involvement or training

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 **3** of 3

Accessing eRA Commons

Once the trainee has received an email from NIH indicating that the account has been activated and providing a password, in a Web browser, the trainee should go to:

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

Enter eRA Commons *Username* and *Password* and Click *Login*

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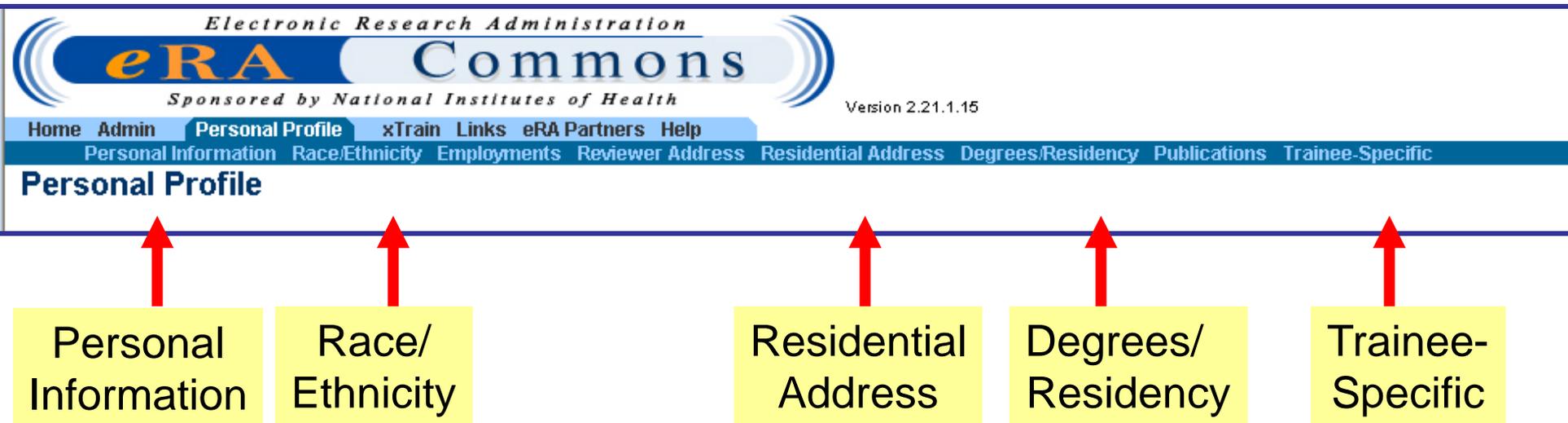
- xTrain will check the Trainee's Profile during the Appointment and Termination process and will generate Errors/Warnings if the expected information is not provided or is inconsistent with xTrain business rules/NIH policy
  - Not all fields that are checked for errors/warnings are marked as required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

Profile – Personal Info

Trainee

Home Admin Institution Profile **Personal Profile** Status eSNAP FFR/FSR Internet Assisted Review xTrain Links eRA Partners Help
Personal Information Race/Ethnicity Employments Reviewer Specific Residential Address Degrees/Residency 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 identif and addressing any program inequities.
- Providing a middle name is especially important for individuals with common names.

* indicates required field

Identifying Information

Name Prefix:		**First Name:***	Ima
Middle Name:		**Last Name:***	Newbie
Name Suffix:		**SSN:** Enter last 4 digits or full SSN	
Gender:*	Do Not Wish to Provide	**DOB (MM/DD/YYYY):***	Do Not Wish to Provide? ☐
Citizenship: Required for participants in research training, fellowship, or career development programs		**Citizenship Country:** For non-US citizens and permanent residents	
eRA Email:*	askera@mail.nih.gov		

Disabilities

Do you have a disability?
○ Yes   ○ No   ○ Do not wish to provide

If yes, which if 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.

Citizenship is a required field for xTrain. A 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.

Disabilities is required for xTrain.

Notes and tips: Information is used for aggregate statistical reporting only, and is a vital tool for identifying and addressing program inequities.

Race(s) and Ethnicity section is required for xTrain

Profile – Residential Address

- The Trainee should provide a permanent address where the Trainee can be reached after the completion of the program - Do not give the present address unless it is considered permanent.

Profile – Degrees/Residency

Trainee

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

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

List of Degrees

Notes and Tips:

- Include all degrees completed or in progress.
- In addition to reporting, degree information is sometimes used to validate application in
- Current information is critical as it can determine eligibility for certain types of appointm
- Enter your most recent Residency Information.
- If you have questions regarding ESI Eligibility Information, follow this link: ESI Eligibility Info
- If you have questions regarding Terminal Research Degree, follow this link: Terminal Resear
- Make sure that your most recent research degree is marked as your terminal degree.

The selected degree has been updated.

Degrees 1- 3 out of 3 records

Degree	Institution	Completion Date	Degree Completed?	Major	Action	Degree
BS: BACHELOR OF SCIENCE	University of Great Students	05/2001	Y		Edit |Delete	
PHD: DOCTOR OF PHILOSOPHY	Get Smart University	04/2007	Y		Edit |Delete	
MD: DOCTOR OF MEDICINE	HHS University	05/2010	Y		Edit |Delete	Y

Add New Degree

Medical Residency

Area of Medical Residency	End date or Expected End Date of Medical Residency	Action
Pediatrics	06/2012	Edit |Delete

Add Medical Residency

Close

Remember to provide information on degrees in progress and the expected completion date.

Check **Terminal Research Degree** *only* when it will be the last degree earned.

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

Add Medical Residency if relevant.

Degree Details

eRA
Trainee

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

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

Disadvantaged background

*Are you from a disadvantaged background ?

[▼]

[Submit] [Reset] [Cancel]

Disadvantaged Background

Individuals from disadvantaged backgrounds are typically high school students or undergraduates, and either:

1. Come from a family with an annual income below established low-income thresholds, or

2. 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.

Under extraordinary circumstances the PHS may, at its discretion, consider an individual beyond the undergraduate level to be from a disadvantaged background. Such decisions will be made on a case-by-case basis, based on appropriate documentation. Trainees should contact the NIH Research Training Officer at NIHTrain@mail.nih.gov for further instructions.

Electronic Research Administration

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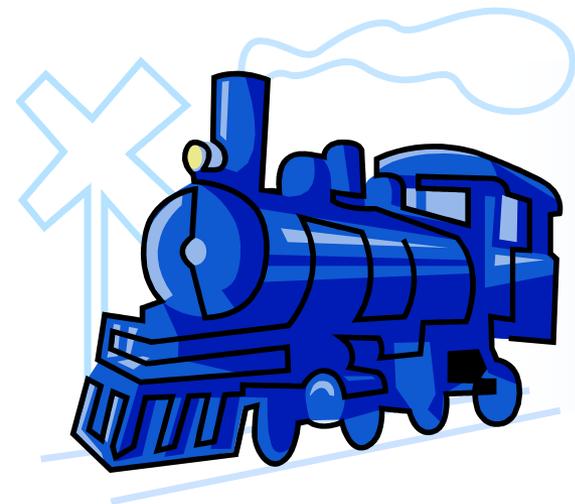
Using xTrain

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/PI's to delegate several types of authority (such as the ability to update the PD/PI's personal profile, to act as the PD/PI, and to perform actions in xTrain)
  - The delegations feature allows users to delegate all available types of tasks to a user (or users) in one place

  See release notes at
  http://era.nih.gov/files/Commons_RN_3.01.01.0_100711.pdf

Delegate xTrain Authority

To Assign Delegation, the PD/PI should

1. Log into eRA Commons at
https://commons.era.nih.gov/commons/
2. Select the *Admin* tab on the blue navigation
bar across the top of the screen
3. Select the *Delegation* option from the Admin submenu
The existing delegations are indicated. To add or delete
delegations, select *Search or Add Delegate* link.

The PD/PI's delegates, including xTrain ASST, will appear.

PD/PI

To use xTrain, log into Commons and then select the xTrain tab

PD/PI users are brought to the My Grants screen when the xTrain tab is selected - The system displays all grants for which you are the PD/PI

The *View Trainee Roster* link will bring you to the page from which you will perform xTrain actions, such as initiating Appointments

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

The *View Pending Submission* link brings you to the page for submitting batch Appointments

Grant Summary

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

My Grants

My Grants

Tips and Notes:

- List of Activity Codes currently supported in xTrain
- Stipend Level Links by Fiscal Year
- The Program Director Column always shows the Contact PI for multi-PI

From the *My Grants* screen, click the Grant Number link to access the *Grant Summary* page.

◁ 1- 2 of 2   1 ▷

Grant Number	Project Start Date	Project End Date	Program Director	Project Title	Includes ARRA Grant(s)	Action
T32 AG 007304	09/01/1989	04/30/2014	Money, Cher D	BIOTECHNOLOGY TRAINING PROGRAM		View Trainee Roster / View Pending Submissions
T32 CA 099936	09/30/1999	06/				

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

My Grants

Grant Summary

Tips and Notes:

- The Program Director Column always shows the Contact PI for multi-PI grants.

Project: T32 CA 099936   **Includes ARRA grants**
Title: xTrain Demo Training Grant
Project Start/End Dates: 04/01/2003 - 08/31/2014

◁ 1- 8 of 8   1 ▷

Grant Number	ARRA Funded	Budget Start Date	Budget End Date	FY	Program Director	Short Term Est.# Trainees	Short Term # Accepted Appointments	Pre Docs Est.# Trainees	Pre Docs # Accepted Appointments	Post Docs Est.# Trainees	Post Docs # Accepted Appointments
1T32CA099936-01A1		09/30/2004	09/29/2005	2004	Money, Cher D	0	0	1	0	3	0
2T32CA099936-06		09/01/2009	08/31/2010	2009	Money, Cher D	0	0	1	1	3	3
3T32CA099936-06S1	Yes	09/30/2009	08/31/2011	2009	Money, Cher D	0	0	1	1	0	0
5T32CA099936-02		09/30/2005	09/29/2006	2005	Money, Cher D	0	0	1	0	3	0
5T32CA099936-03		09/30/2006	09/29/2007	2006	Money, Cher D	0	0	1	0	3	2
5T32CA099936-04		09/30/2007	08/31/2008	2007	Money, Cher D	0	0	1	0	3	2
5T32CA099936-05		09/01/2008	08/31/2009	2008	Money, Cher D	0	0	1	0	3	3
5T32CA099936-07		09/01/2010	08/31/2011	2010	Money, Cher D	0	0	1	0	3	0

[View Trainee Roster] [Back]

Selecting a *Grant Number* link retrieves the *Commons PI View* screen for that project

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

PD/PI

![eRA PD/PI logo]

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

My Grants

My Grants

Tips and Notes:

- List of Activity Codes currently supported in x...
- Stipend Level Links by Fiscal Year
- The Program Director Column always shows the Contact PI for multi-PI grants.

◁ 1- 2 of 2   1 ▷

Grant Number	Project Start Date	Project End Date	Program Director	Project Title	Includes ARRA Grant(s)	Action
T32 AG 007304	09/01/1989	04/30/2014	Money, Cher D	BIOTECHNOLOGY TRAINING PROGRAM		View Trainee Roster / View Pending Submissions
T32 CA 099936	09/30/1999	06/30/2014	Money, Cher D	XTRAIN DEMO TRAINING GRANT		View Trainee Roster / View Pending Submissions

Click the *View Trainee Roster* link to perform xTrain actions.

Home Admin Institution Profile Personal Profi...

My Grants

Trainee Roster

Notes and Tips:

- If an institutional research training appointm... amend the period of appointment for a traine...

- For appointments to institutional career development (K12, KL2, KM1) and research education (R25, R90) awards that are ending early, the PD/PI should only use the Termination Notice if specifically instructed to do so by the awarding IC. If a Termination Notice is not required, the new appointment end date should be documented by an amendment to the appointment.

Project: T32 CA 099...
Project Title: xTRAIN 'DE...
Project Start/End Dates: 04/01/2003...

Make selection of time period to see and click *Go*.

Latest and Previous Awarded Support Years ▼	Go

Latest Awarded Support Year
Latest and Previous Awarded Support Years
All Years

◁ 1- 12 of 12   1 ▷

Application Trainee/Fellow 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	Current Reviewer	View	Action
5T32CA099936-07 (Budget Period: 09/01/2010 - 08/31/2011) Create New Appointment														
Flake, Snow	New	2010	11/01/2010	10/31/2011		No	POST-DOC	In-Progress Trainee	Electronic			2271: Flake, Snow	View 2271 / View Payback	- 2271 Form
Tide, High	New	2010	12/01/2010	11/30/2011		No	PRE-DOC	In-Progress PI	Electronic			2271:Money, Cher D	View 2271	- Process 2271
3T32CA099936-06S1 (Budget Period: 09/30/2009 - 08/31/2011) **ARRA Funded** Create New Appointment														
Gator, Ella	New	2009	09/30/2009	09/29/2010	09/29/2010	Yes	PRE-DOC	Accepted	Electronic	In Progress BO	Electronic	2271: AGENCY TN:Bow, Rain	View 2271 / View TN	- 2271 Form / - Term Notice

PD/PI

Action:
2271 Form
Amend 2271
Initiate TN
Term Notice

Appointment/Termination Source:
Paper or Electronic

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	Current Reviewer	View	Action
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
Re-appointment
Amendment
Blank for paper

Appointment Status:
In Progress PI
In Progress Trainee
Pending Agency Review
On Hold by Agency
On Hold by Agency—
   Awaiting Paper Signature
Accepted
Terminated

Termination Status:
In Progress BO
In Progress PI
In Progress Trainee
Pending Agency Review
On Hold by Agency
On Hold by Agency –
   Awaiting Award Revision
Accepted

View: (PDF version)
View 2271
View TN
View Payback

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

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

xTrain
Appointment Process

Trainee Appointment* Flow

PD/PI identifies Trainee, initiates Appointment by filling out the 2271 and routes 2271 to Trainee

Program Director/ Principal Investigator

Trainee fills out the 2271 form and updates profile and routes it back to PD/PI

Trainee

PD/PI reviews completed 2271 and routes it to Agency for final approval

Agency

* Also applies to Re-appointments and Amendments

Before Submission to Agency

In Progress PI – The PD/PI or the Assistant is working on the Appointment.

In Progress Trainee – The Trainee is working on the Appointment.

After Submission to Agency

- **Pending Agency Review** – The Appointment has been submitted to the Agency

- **On hold** – The Appointment has been submitted and the Agency reviewer has put it on hold

- **On hold – Awaiting Paper Signature – The** Appointment has been submitted and the Agency reviewer has put it on hold while waiting for the Payback Agreement and/or the documentation for a permanent resident

PD/PI

PI Trainee Roster screen

Application / Trainee Name	Appointment Type	FY	Appointment Start Date	End Date	Termination Date	End Date Past?	Degree Level	Appointment Status	Appointment Source	Termination Status	Termination Source	Current Reviewer	View	Action
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

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:

ImaNewbie

Identify Trainee

Continue   Cancel

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

Statement of Training Appointment

Project Number: T32 MH 312008
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

* screen continues on next slide *

PD/PI

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 suppprt 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) is best.

——Pediatric Oncology (7330)

Select Field of Training.

Period of Appointment

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

* To (MM/DD/YYYY)   6/30/2007

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

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

Must Re-calculate if calendar box is used.

Users enter salaries /other compensation for a whole or partial year.

Support for

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

* Stipend Level   0 - 36,996 POST-DOC

* Stipend /Salary/Other Compensation   36996

* Tuition/fees (estimated)   12000

* Travel   1200

Total   50196

Select level appropriate to Trainee degree and experience.

Stipend must be entered and non-zero.

[Save] [Cancel]

Appointment can be saved for later action.

PD/PI

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

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

- 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

PD/PI

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**

[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**

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

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

Trainee

Statement of Training Appointment

Project Number: T32 MH 312008
Appointment Status: In-Progress Trainee <u>View Routing History</u>
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

Trainee

* screen continued from previous slide *

From Trainee Profile or Trainee Supplied

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 go to the Admin tab, Accounts tab, and then click on the 'Verify NIH Support' submenu and follow the instructions for verifying NIH support.

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

PD/PI Supplied

* **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)   07/01/2006

* To (MM/DD/YYYY)   06/30/2007

12 months 0 days were used to select dates.   Re-calculate

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

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

Support for Period of Appointment

Type	Total for this Grant *(Omit cents)*
* Stipend Level or Salary	0 - 36,996 POST-DOC
* Stipend/Salary/Other Compensation	36996
* Tuition/fees *(estimated)*	12000
* Travel	1200
Total	50196

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*.

Save   Cancel   Reset   Save & Route to PI   View PDF

Trainee

- 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

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

Trainee

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.

[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]

Electronic Signature recorded.

Route to PI Confirmation

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

[Done]

Trainee Appointments and Terminations screen

Grant Number	Appointment Type	ARRA	Appointment Start Date	Appointment End Date	Termination Date	Program Director	Institution	Degree Level	Appointment Status	Termination Status	Current Reviewer	View	Action
5T32MH312008-04	New		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*.

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New Appointment

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

Only the PD/PI can submit an appointment. The assistant cannot submit to the Agency.

PI Trainee Roster screen

Application Trainee Name	Appointment Type	FY	Appointment Start Date	End Date	Termination Date	End Date Past?	Degree Level	Appointment Status	Appointment Source	Termination Status	Termination Source	Current Reviewer	View	Action
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

Type	Total for this Grant *(Omit cents)*
* Stipend Level or Salary	0 - 36,996 POST-DOC
* Stipend /Salary/Other Compensation	36996
* Tuition/fees *(estimated)*	12000
* Travel	1200
Total	50196

Click **_Submit to Agency_** to complete the Appointment initiation process.

Appointment Validation Warning

- Users could receive a validation warning
- Appointments can be submitted with warnings
- The PD/PI should decide whether or not to submit the Appointment based on the message
- Press Continue to complete the submission
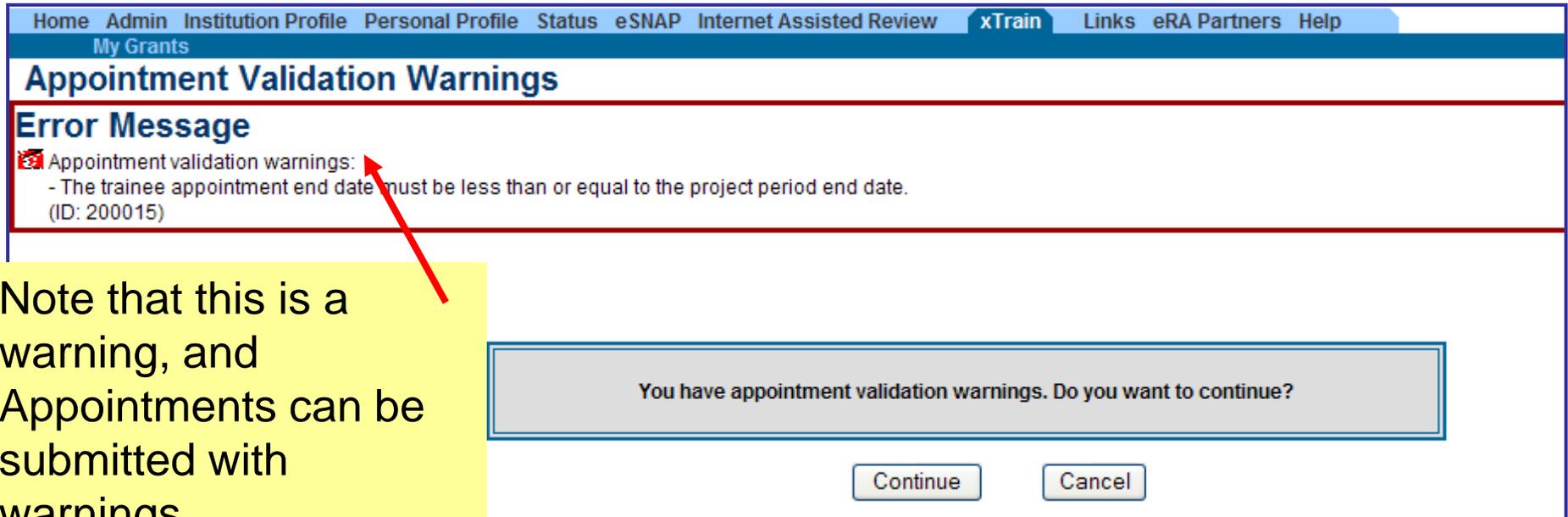
Home Admin Institution Profile Personal Profile Status eSNAP Internet Assisted Review **xTrain** Links eRA Partners Help

My Grants

Appointment Validation Warnings

Error Message

Appointment validation warnings:
- The trainee appointment end date must be less than or equal to the project period end date.
(ID: 200015)

Note that this is a warning, and Appointments can be submitted with warnings

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

Continue   Cancel

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

Continue Cancel

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

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.

I Accept Cancel

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 Payback Agreement (6031), and the appointment will not be accepted until the Agency receives the signed forms.

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

Payback Agreement Form

Done

Post-doc Appointments may require signed paper Payback Agreement.

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

- 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
  - Mail signed original Payback Agreement (6031) form to the awarding NIH Institute
  - Mail confirmation of permanent residency (if needed)

Amendment

- Once an Appointment is Accepted by the Agency, an Amendment is needed to change any of the following items:
  - Name
  - Permanent Mailing Address
  - Appointment Period
  - Amount of 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 TN |

Department of Health and Human Services
Public Health Services

Statement of Appointment
(Please Type)

Follow attached instructions carefully. Submit this form at the time the individual is appointed, is reappointed, or the reported appointment is amended. Return this form to the PHS awarding component. For new postdoctoral trainees under NRSA, signed and dated payback agreement **must** accompany this form.

1. PHS GRANT NUMBER   5 T32 DA 7097-27

Type	Activity	ID Serial
5	T32	7097

4. TYPE OF ACTION *(Mark X for only one type)*

☐ NEW appointment (NOT previously supported by this grant)
☐ REAPPOINTMENT (Previously supported by this grant)
☒ AMENDMENT of items checked: ☐ 2 ☐ 9 ☒ 15

6. SOCIAL SECURITY NO.

XXX-XX-°°°°

10. Are you Hispanic (or Latino)?   *Mark(X)*   ☐ YES ☒ NO ☐ Intentionally Withheld

11. What's your racial background?   *Mark (X) one or more*
☐ American Indian or Alaska Native
☐ Native Hawaiian or other Pacific Islander
☐ Asian
☐ Black or African American
☒ White
☐ Intentionally Withheld

12. Do you have a disability?
☐ YES ☒ NO ☐ Do not wish to provide

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

| ☐ Hearing | ☐ Mobility/Orthopedic Impairment |
| ☐ Visual | ☐ Other |

13. Are you from a disadvantaged background?
☐ YES ☐ NO ☐ Intentionally Withheld

14. FIELD OF RESEARCH TRAINING OR CAREER DEVELOPMENT   *(for this appointment)*

Enter a 4 digit code from instructions: 3200

15. PERIOD OF APPOINTMENT   *(Month, day, year)*
From: 09/03/2008   To: 09/02/2009

16. EDUCATION – AFTER HIGH SCHOOL   *(Indicate all academic and professional education. For foreign degrees, give U.S. equivalent.)*

(a) Name of Institution and Location (List most recent first)		(b) Degree(s) Received		(c) Major Field	(d) Minor Field
		Degree	Mo./Yr.		

Original Value   **Amended Value**

	Original Value		Amended Value	
	09/03/2008 - 09/02/2009		09/03/2008 - 12/14/2008	
...NTMENT				
	$20772		$5885	
Trainee Signed Date	08/08/2008			
PD Signed Date	08/08/2008		12/04/2008	

PHS 2271   Page 2 of 2   continued

The ***View 2271*** link for the ***Amendment*** (the PDF version) shows the original 2271 (as it was submitted) with an Amendment section appended at the end that shows each amendment, including those created by an early termination.

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.

The Period of Appointment pre-populates with the original dates.
Remember to update with the new dates and then select stipends for the new fiscal year.

On the 2271 form, users select the grant or supplement for re-appointment

- To make the Appointment submission process easier, the PD/PI can submit all Appointments, re-appointments and amendments at one time from the My Grants screen.

- Click the View Pending Submissions to view all Appointments, re-appointments and amendments awaiting submission.

My Grants

Tips and Notes:

- List of Activity Codes currently supported in xTrain
- Stipend Level Links by Fiscal Year
- The Program Director Column always shows the Contact PI for multi-PI grants.

1- 1 of **1**   1

Grant Number	Project Start Date	Project End Date	Program Director	Project Title	Includes ARRA Grant(s)	Action
T32 MH 312008	07/01/1975	03/31/2011	Money,Cher D	XTRAIN DEMO TRAINING GRANT		View Trainee Roster / View Pending Submissions

PD/PI
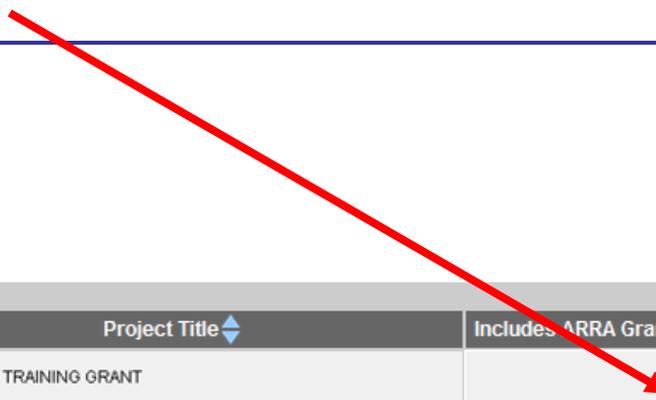
Pending Submissions

Select All / Reset	Application Trainee Name	Appointment Type	Appointment Start Date	Appointment End Date	Highest Degree (s)	Degree Level	Stipend Salary	Tuition Fee	Travel	Total	Action
5T32MH312008-35 (Budget Period: 07/01/2010-06/30/2011)											
☐	King, Lion	Reappointment	10/01/2010	09/30/2011	BA	PRE-DOC	21180	18052	300	39532	View 2271 Process 2271
☐	Munk, Chip	Reappointment	10/01/2010	06/30/2011	MS	PRE-DOC	15885	13085	300	29270	View 2271 Process 2271

These options allow the PD/PI to view an individual form and check it for errors (by using the validate button) before submission

Select and Submit

Submit

Only the PD/PI can submit

Provide Comments

Comments are optional. If you would like to send comments to the Agency by e-mail, please enter them in the above boxes.

Continue   Cancel

Submit to Agency Certification

I certify that these individuals are qualified for this program and are eligible to receive financial support for the following budget period(s): 07/01/2010-06/30/2011 .

I Accept   Cancel

Submit to Agency Confirmation

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

Done

The submitted Appointments will have the status of **Pending Agency Review**

Routing History

- The View Routing History link is available throughout many of the xTrain processes
  - Provides event history, including routing comments
  - Can be accessed by viewing a form and select "Routing History" or clicking on the 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

Close

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- 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
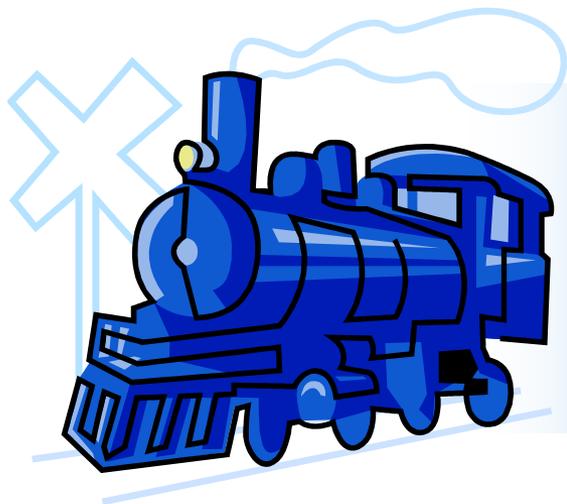
xTrain
Termination Process

Termination Notice Use

- The Termination Notice documents the termination of NRSA fellowships and Appointments to NRSA training grants

- It may also be used to document the termination of Appointments to non-NRSA institutional research training programs (e.g., NLM T15's), research education awards (e.g., R25), and institutional career development awards (e.g., K12).

  – For non-NRSA awards, please refer to the Funding Opportunity Announcement or Notice of Award to determine whether a termination notice is required.

Program Director/Principal Investigator (PD/PI; PI role)

- Initiates Termination Notices

- Can submit some Termination Notices

- In addition to institutional training grant and career development directors and leaders of research education awards, the Fellow is also a PD/PI

PD/PI Delegate (ASST role)

- Person, delegated by the PD/PI, with the authority to perform xTrain-related functions on his/her behalf

- Performs same actions and notifications as PD/PI except for submitting to Agency

Trainee

- Person at grantee institution who will be appointed as a Trainee, Scholar, or Participant on a training grant, career development award, or research education award

- Fellows are called Trainees in xTrain on the Trainee roster

Business Official (BO role)

– Person working in the research institution's business office who has signature or other authority related to administering training grants

– BOs submit Termination Notices on behalf of the Institution for NRSA and non-NRSA research training Appointments and Fellowships

Sponsor Role

– Person who mentors Fellows

– They can submit Termination Notices for Federal and Foreign Fellows

Sponsor Delegate

– Person, delegated by the PD/PI, with the authority to perform xTrain-related functions on his/her behalf except for submitting to the Agency

PD/PI locates Trainee on Roster, initiates a Termination Notice (TN), inputs additional info and routes TN to Trainee

Trainee fills out required information and routes the TN back to PD/PI

Program Director/ Principal Investigator

Trainee

PD/PI reviews TN and routes it to BO

BO approves and routes TN to Agency

Agency

Termination for Others

- **The termination process flow for fellows differs**

  - The Fellow (PD/PI), Sponsor or Business Official (BO) can initiate the Termination Notice

  - Fellows and Sponsors can submit the Termination Notice directly to the Agency if the organization of the grant is either a Federal organization or foreign (the address is not in the US)

- **The termination process flow for a few other Appointments also differs**

  - Only the PD/PI can submit a Termination Notice for K12, KL2, R25, R90, and KM1 Appointments. The BO is not involved.

Termination Statuses

Before Submission:

- **In Progress PI** - the PD/PI or an assistant is working on the TN
- **In Progress Trainee** - the Trainee is working on the TN
- **In Progress BO** – the Business Official is working on the TN
- **In Progress Sponsor –** The Sponsor is working on the TN

After Submission:

- **Pending Agency Review –** The Termination Notice has been submitted to the Agency
- **On Hold by Agency –** The Agency has reviewed the TN but has not yet accepted it
- **On Hold by Agency – Awaiting Award Revision** – A fellowship award has submitted an early TN, and has been placed on hold until the award can be revised

eRA xTrain Termination Notice Facts

Does xTrain support terminations for all training grants?

- Termination Notices can be submitted using xTrain for all NRSA awards except for T34s

- T34 awards are automatically terminated 180 days after the end date of the most recent T34 Appointment.

- xTrain also supports the termination of NRSA fellows

How will external users know they have to submit termination notices or a reappointment?

- Reminders are sent 30 days before the end date of the latest Appointment or fellowship to PD/PI and Assistant for Appointments and to Fellow, BO, Sponsor, and Sponsor Delegate for Fellowships

- Reminders are sent to the same individuals when the end date has passed and also 14 days after the end date

What happens if institutional officials do not process termination notices?

For Training Grants

- Termination Notices are automatically routed from the Trainee to the PD after 14 days
- Termination Notices are automatically routed from the PD/PI to the Business Official after 14 days

For Fellowships

- Termination Notices are automatically routed from the Sponsor to the Business Official after 14 days
- Termination Notices are automatically routed from the Fellow to the Business Official after 14 days

Termination Overview

Who can Submit a Termination Notice?

- Only the **Business Official** can submit a Termination Notice to the Agency on behalf of the Institution for Appointments to Research Training grants or fellowships except for Federal or Foreign fellowships.

- For fellowships that are Federal or Foreign, the **PD/PI** (fellow) or **Sponsor** can submit the termination notice

- Only the **PD/PI** can submit a Termination Notice for K12, KL2, R25, R90 and KM1 Appointments.

PD/PI

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

PI Trainee Roster screen

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

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.go
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 or Fellow profile.

PD/PI

screen continued from previous slide

Termination Date and Business Official submitting the Termination Notice to NIH

Termination Date:
03/15/2004 [Modify Termination Date]

*Business Official:
Happy, IDA

Choose a BO from drop-down list

*Business Official:
Happy, IDA
- Happy, IDA
- Shower, Rain
- Flake, Snow

Total Kirschstein - NRSA Support Under This Award

Support Year	Start Date	End Date	* Amount of Stipend	Standard Stipend Amount	Num Months
Yea...				035.00	9	0

Training R...

Provide a...
from the r...
terminate...

- OR -

Upload PD...

Post Awa...

Activity		
○ Further Education/Training	○ Academic	○ Student
○ Teaching	○ Industry	○ Resident/...
○ Research	○ Government	○ Postdocto...
○ Administration	○ Hospital	○ Research...

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 [📅]

[Continue] [Cancel]

- For both Trainees and Fellows, the ***Modify Termination Date*** button is used to modify the end date of the latest Appointment or fellowship on the Termination Notice
- The system will recalculate the stipend for Appointments

- For Appointments, this modification becomes an Amendment
- For Fellows, Agency users cannot accept this change until the Notice of Award is modified

screen continued on next slide

Termination Notice

* screen continued from previous slide *

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

Position Title: [   ]

Field: [   ]

Name of Organization: [   ]

City: [   ]

State: [Select State ▼]

Phone No: [   ]

The majority of information requested is entered by the Trainee or Fellow.

Mailing Address after Termination of this Kirschstein-NRSA Support

Street: [   ]

City: [   ]

State: [Select State ▼]

ZIP: [   ]

Phone No: [   ]

Email: [   ]

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 contact the eRA HelpDesk.

Grant Number	From	To

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

[Save] [Cancel]

PD/PI **Saves** the form.

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

PD/PI

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

Continue   Cancel

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

Done

PI Trainee Roster screen

| Dale, Chip N | Reappointment | 2009 | 09/06/2009 | 09/05/2010 | 08/05/2010 | Yes | POST-DOC | Accepted | Electronic | In Progress Trainee | Electronic | 2271: AGENCY TN, Dale, Chip N | View 2271 View TN View Payback | - Amend 2271 - Re-Appoint 2271 - 2271 Form - Term Notice |

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

Trainee

Trainee Appointments and Terminations

Now the Termination Notice from the Trainee and Fellow perspective…

◁ 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
1T32MH312008-06A1	09/06/2009	08/05/2010	09/05/2010	Money, Cher M.	EXT UAT DEMO CORP.	POST-DOC	Accepted	In Progress Trainee	TN: Dale,Chip N.	View 2274 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.go
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 *

Termination Notice

* screen continued from previous slide *

Termination Date and Business Official submitting the Termination Notice to NIH							
Termination Date: 08/05/2010	Business Official: Ida, Happy						

Total Kirschstein - NRSA Support Under This Award							
Support Year	Start Date	End Date	Amount of Stipend/Salary	Standard Stipend Amount	ARRA	Number of	
						Months	Days
Year 3	09/06/2007	09/05/2008	36,996.00			12	0
Year 5	09/06/2008	09/05/2009	38,976.00			12	0
Year 6	09/06/2009	08/05/2010	39000.0	42,204.00		11	0
		Totals:	114972.00				

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

[Browse...]

Post Award Information

* Activity	* Organization	* Type of Position
○ Further Education/Training	○ Academic	○ Student
○ Teaching	○ Industry	○ Resident/Clinical Fellow
○ Research	○ Government	○ Postdoctoral Researcher
○ Administration	○ Hospital	○ Research Scientist (non faculty)
○ Clinical Practice	○ Non-profit	○ Faculty: Tenure-Track
○ Unknown	○ Unknown	○ Faculty: Other

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

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

* screen continued on next slide *

Trainee

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

Position Title: [_____]

Field: [_____]

Name of Organization: [_____]

City: [_____]

State: Select State [v]

Phone No: [_____]

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

Mailing Address after Termination of this Kirschstein-NRSA Support

* **Street:** Acorn Lane

* **City:** Acorn

* **State:** INDIANA [v]

* **ZIP:** 23121

* **Phone No:** 301-555-1212

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

> Provide mailing address where you can be reached.

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 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]

eRA *Trainee*

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

[Continue] [Cancel]

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

> **Click *Continue* button.**

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.

[I Certify] [Cancel]

> **Electronic Signature recorded.**

Termination Notice Confirmation

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

[Done]

Trainee Appointments and Terminations

Tips and Notes:

- The Program Director Column always shows the Contact PI for multi-PI grants.

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

1- 3 of 3   1

Grant Number	Appointment Type	ARRA	Appointment Start Date	Appointment End Date	Termination Date	Program Director	Institution	Degree Level	Appointment Status	Termination Status	Current Reviewer	View	Action
2T32CA099936-06	Reappointment		2009-09-06	2010-09-05	2010-08-05	Money, Cher D	UNIVERSITY OF PENNSYLVANIA	POST-DOC	Accepted	In Progress PI	2271: AGENCY TN: Money, Cher D	View 2271 View TN View Payback	2271 Form Term Notice

Termination Notice

PD/PI

- 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 | Reappointment | 2009 | 09/06/2009 | 09/05/2010 | 08/05/2010 | Yes | POST-DOC | Accepted | Electronic | In Progress PI | Electronic | 2271: AGENCY TN: Money, Cher D | View 2271 / View TN / View Payback | - Re-Appoint 2271 - Process TN - 2271 Form |

Bottom of form...

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 contact the eRA HelpDesk.

Grant Number	From	To

ute to BO.

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

[Save] [Cancel] [Reset] [Save & Route to Trainee] [Save & Route to BO] [Delete] [View PDF]

86

BO

- 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		
			Money			Search	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		
			Money			Search	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.

BO

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

Select the ***Process TN*** link.

BO 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	Current Reviewer	View	Action
2T32MH312008-6A1 (Budget Period: 9/01/2009 - 08/31/2010)														
Dale, Chip N	Reappointment	2009	09/06/2009	09/05/2010	08/05/2010	Yes	POST-DOC	Accepted	Electronic	In Progress BO	Electronic	2271: AGENCY TN: Happy, Ida	View 2271 View TN View Payback	Process TN - 2271 Form

Bottom of form...

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 contact the eRA HelpDesk.

Grant Number	From	To

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

[Save] [Cancel] [Reset] [Save & Route to Trainee] [Save & Route to PI] [Save & Submit to Agency] [Delete] [View PDF]

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
```

[Continue] [Cancel]

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

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]

Click **Continue** button.

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]

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**.

- 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)
TRAINEE, THIRD

2. FELLOWSHIP OR TRAINING GRANT NO.
5T32DA007097-27

3. NAME OF SPONSORING INSTITUTION
UNIVERSITY OF MINNESOTA

4. SOCIAL SECURITY NO.
XXX-XX-XXXX

5. DEGREE(S) EARNED/COMPLETION DATE(S)
BS(12/1997), PHD(09/2010)

6. DATES OF KIRSCHSTEIN-NRSA SUPPORT UNDER THIS AWARD (Month, day, year): FROM: 09/03/2007   TO: 12/14/2008

Shows early termination date, if applicable.

7. TOTAL KIRSCHSTEIN-NRSA STIPEND RECEIVED AND NUMBER OF MONTHS SUPPORTED UNDER THIS AWARD (See specific instructions for Amount of Stipend)

YEAR OF SUPPORT	AMOUNT OF STIPEND
YEAR 26	20,772.00
YEAR 27	5,885.40

8. Provide a summary of training received and research research during this period. List grants and career awa reason.

Training received included courses on Neuroin program retreat/conference, and laboratory me Expression and localization of RGS9-2/Gb5/R7 cellular cysteine proteases. Journal of Neurosc early to accept individual NRSA award (Grant

9a. POST-AWARD INFORMATION: Complete chart belov

Activity	Organization	Type of Position	10a. MAILING ADDRESS AFTER TERMINATION OF THIS KIRSCHSTEIN-NRSA SUPPORT (Street, city, state, zip code)
[X] Further Education/Training [ ] Teaching [ ] Research [ ] Administration [ ] Clinical Practice [ ] Unknown [ ] Other	[X] Academic [ ] Industry [ ] Government [ ] Hospital [ ] Non-profit [ ] Unknown [ ] Other	[ ] Student [ ] Resident/Clinical Fellow [X] Postdoctoral Researchers [ ] Reserarch Scientist (non faculty) [ ] Faculty: Tenure-Track [ ] Faculty: Other [ ] Clinical Staff/Private	123 My Street, Berkeley CA 94705
			10b. TEL NO. 415-000-0000

9c. TEL NO.

11. OTHER PHS
[ ] NHSC Sch
[ ] Kirschstein

Period of Su

[ ] LRP

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 Electronically certified via eRA xTrain system by PI	DATE 10/08/2010	TYPED NAME OF SPONSOR OR PROGRAM DIRECTOR Day, Sunny	

14. Business Official¿½s Verification of Items 6 and 7. (Not applicable to individual fellows at Federal or foreign institutions.)

SIGNATURE Electronically verified via eRA xTrain system by BO	DATE 12/07/2010	TYPED NAME OF BUSINESS OFFICIAL Jay, Blue	TEL: FAX:

15. (For Government use only) The information provided in Items 6 and 7 is in agreement with PHS records.

SIGNATURE	DATE	TYPED NAME AND AWARDING OFFICE -

PHS 416-7
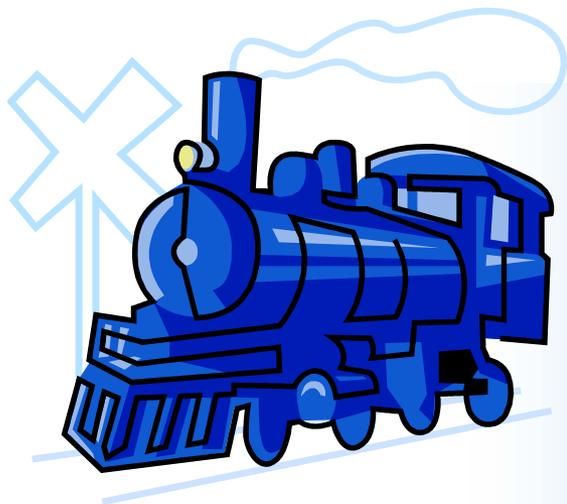
xTrain
Additional Information and Resources

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

  - **Validate** – runs validations & gives errors/warnings

  - **Recall** – 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 Start Date	Appointment End Date	Termination Date	End Date Past?	Degree Level	Appointment Status	Appointment Source	Termination Status	Termination Source	Current Reviewer	View	Action
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

- 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/training_career/index.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/
- E-mail: commons@od.nih.gov
- Toll-free: 1-866-504-9552
- Phone: 301-402-7469
- TTY: 301-451-5939
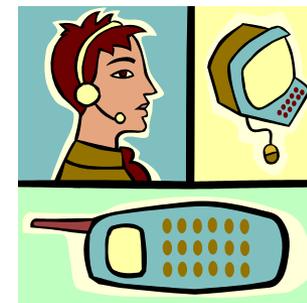
Don't forget to get a help desk ticket number if your issue isn't immediately resolved.