Suggested Enhancements from Institution xTrain Pilot Users

Note: This is a running list of suggestions received from our xTrain pilot users. The list will be reviewed/discussed with pilot participants and NIH stakeholders during the feedback phase of the pilot and a list of recommended changes will be created from that discussion.

1. Consider routing (or providing option to route) appointments and reappointments through the BO. *Note: BOs currently have the ability to enter the system at any time and see the status of all the appointments and terminations at their institution.*
2. Can the 2271 route from the PD/PI to the trainee even though it has errors, and then notify the trainee of the errors so they can fix them? *(CQERA00048376, Out of Cycle release Feb.)*
3. Can the message inviting trainees to sign up for a Commons account encourage them to fill in all the required fields? Perhaps include a reminder like "be sure to fill out all required profile information (marked with an asterisk) to avoid errors when amendments and terminations are processed."
4. When PD/PI routes appointments and terminations to trainee, the error message provided when the trainee does not have an account should state that the system has invited the trainee to register.
5. Allow whoever is appointed as the current PD/PI the ability to manage appointments, terminations and other admin tasks related to all previous years of the training grant. *(CQERA00048384, April Enterprise Release)*
6. For other roles besides SO, under maintain accounts the "BO" role is not included in the List of Values. Would like AO to be able to create "BO" accounts.
7. Related comments on PD/PI screen regarding display of unfunded training grants…
    a. If all T32s are going to be shown in the PI/PD's profile, I suggest that the screen include the funding status as well. Alternatively, when on the link to an unfunded T32, the new screen should give the funding status if it was not awarded (e.g., "Pending", "Withdrawn…"') rather than "No records returned Refine the search and try again."
    b. In the "My Grants" view, if a grant is not funded, it shouldn't have an active link to "View Trainee Roster" in the "Action" column. Instead, something like "not funded" or "pending" or whatever might be appropriate could be listed there.
    c. PD/PI screen should be modified to display only funded training grants, since appointments cannot be made to pending or withdrawn training grants.
8. Eliminate paper trail required for post-docs. Is scanning and uploading a document an option? *Note: NRSA Postdoctoral Trainees are obligated to financial or service payback. NIH is legally required to keep original signatures for these agreements in the grant file due to this payback obligation*.
9. In the Trainee Roster Screen, it's very useful to be able to sort by Application, but it would also be nice to sort by Trainee Name so that users can see a particular trainee's history on that grant.
10. It would be nice to include in the routing history when the trainee has been emailed to request that s/he set up a Commons account.
11. In the trainee roster view screens, for ease of navigation, it would be nice if the "back" button was displayed somewhere in the top portion of the window and not just at the bottom. This would eliminate the need to scroll to the bottom just to go back.
12. Saving an Appointment and having to go back in to route to the Trainee requires extra mouse clicks and is cumbersome. Would like option to Save & Route to Trainee in single step.
13. Provide better interface to manage PI delegations. Currently each type of authority (PI, PPF Edit, Status and xTrain) must be done separately and from different screens.
14. Consider removing or changing time-frame for auto-routing of termination to BO if no PD/PI action in 14 days.
15. Provide option to identify existing trainee Commons accounts for reappointments and terminations (similar to appointments).

Last updated on 1/28/2008