xTrain Overview & Functions

A quick reference guide for institution users

1. The PD/PI Accesses the Trainee Roster in xTrain

xTrain provides Program Directors/Principal Investigators (PD/PI), university administrators, and Trainees the ability to electronically prepare and submit PHS 2271 Statement of Appointment forms and PHS 416-7 Termination Notices associated with institutional research training grants, institutional career development awards, individual fellowships and research education awards. xTrain is also used by Agency grants management staff to review and process the Appointments and Termination Notices submitted electronically.

2. What Forms are Supported?

Form-specific information can be found at:
http://grants.nih.gov/grants/forms.htm

- Statement of Appointment Form (PHS 2271)

- Termination Notice (PHS 416-7)

- Payback Agreement (PHS 6031)—available for downloading and printing, for affected Trainees. xTrain will populate the basic information prior to printing.

3. Who are the xTrain Users?

- **Program Director/Principal Investigator (PD/PI)**—person responsible for the overall direction of the training program and is authorized to submit Appointments, Re-Appointments, and Amendments on behalf of the Institution. The PD/PI submits Termination Notices for Appointments on KL2, K12, KM1, R25 and R90 activity codes. The PD/PI role also refers to Fellows that have received individual fellowship awards, who can initiate Termination Notices at the conclusion of their fellowships.

- **PD/PI Delegate (Assistant)**—person, delegated by the PD/PI, with the authority to perform xTrain- related functions (except submitting Appointments) on the PD/PI's behalf; holds Assistant (ASST) role in eRA Commons. A Fellow does not

have a delegate.

- **Trainee**—person at grantee Institution who will be appointed as a Trainee on institutional research training grants, institutional career development awards, and research education awards.

- **Business Official (BO)**—person who has signature or other authority related to administering training grants and is authorized to submit Termination Notices on behalf of the Institution.

- **Sponsor**—person who mentors Fellows and can initiate and facilitate the termination of a Fellowship. The Sponsor can submit the Termination Notice for Foreign and Federal Fellowships only.

- **Sponsor Delegate**—person, delegated by the Sponsor, who facilitates the termination of Fellowships but is not authorized to submit the Termination Notice.