



xTrain Appointment, Re-Appointment, and Amendment Quick Reference Guide for Institution Users

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

- The PD/PI logs into eRA Commons and selects the **xTrain** tab to open the *My Grants* screen.
- From the list of grants presented, the PD/PI selects the **View Trainee Roster** link for the desired grant.
- The *Trainee Roster* appears, with the default of the **Latest and Previous Awarded Support Years**.

NOTE: A designated Assistant may perform PD/PI tasks in xTrain, except for submitting forms to the Agency.

2. The PD/PI Initiates a New Appointment, Re-Appointment, or Amendment

- The PD/PI selects an appropriate action link from the *Trainee Roster* for a desired support year:
 - Create New Appointment link (located next to the support year heading).
 - Re-Appoint 2271 or Amend 2271 link (under the **Action** column for the chosen Trainee).

NOTE: The PD/PI must provide the Trainee's eRA Commons User ID. If the Trainee does not have an eRA Commons account, the PD/PI must invite the Trainee to register in eRA Commons, and the Trainee must respond to the invitation, before the PD/PI can route the 2271 to the Trainee. See **Trainee Account Registration** below.

- A 2271 form is opened with fields pre-populated from the Trainee's Personal Profile. The PD/PI enters the Appointment information and presses the **Save** button. The **Appointment Status** is set to *In Progress PI*.

3. The PD/PI Routes the 2271 to the Trainee

The PD/PI clicks the **Save & Route to Trainee** button at the bottom of the form.

- xTrain checks the form, and may alert the PD/PI to errors to be addressed or warnings to consider. If the form is error-free it will be routed to the Trainee, but if not, the errors must be corrected before proceeding.
- Once successfully routed, the status in the Trainee Roster becomes *In Progress Trainee*.
- An email is sent to the Trainee about the routing action.

4. The Trainee Goes to xTrain and Completes the Form

- After being alerted by email about the pending Appointment, the Trainee logs into eRA Commons and selects the **xTrain** tab to open the *Trainee Appointments and Terminations* screen.
- To access the Appointment form, the Trainee selects the **Process 2271** link, and then completes the appropriate form fields.

5. The Trainee Routes the Form to the PD/PI

- After completing the form, the Trainee clicks the **Save & Route to PI** button to send it back to the PD/PI.
 - xTrain checks the form, and may alert the Trainee about errors to be addressed or warnings to consider. If the form is error-free it will be routed to the PD/PI, but if not, the errors must be corrected before proceeding.
- Upon routing, the Trainee's Electronic Signature is recorded and the status in the Trainee Roster becomes *In Progress PI*.
- An email is sent to the PD/PI and the Assistant about the Trainee's routing action.

6. The PD/PI Submits the 2271 to the Agency

- When submitting appointments to the Agency, PD/PIs can submit Appointments one by one or many at a time through the batch process.
 - Single Submission: From the *Trainee Roster* screen, the PD/PI opens the form by selecting the **Process 2271** link. The PD/PI reviews the form and clicks **Save** to retain any updates. When satisfied with the form, the PD/PI sends the form to the Agency by clicking the **Save & Submit to Agency** button.
 - Batch Submission: The PD/PI clicks the **View Pending Submissions** link on the *My Grants* Screen and selects Appointments to submit.
- xTrain checks the form(s), and may alert the PD/PI about errors to correct or warnings to consider. If the form is error-free it will be routed to the Agency, but if not, the PD/PI must correct the errors before submitting the 2271. For the batch process, the PD/PI can de-select the Appointments with errors and correct them later. The PD/PI's Electronic Signature is recorded and the status becomes *Pending Agency Review*.
- If applicable, the PD/PI also mails proof of permanent residency and/or a signed, hard copy of the Payback Service Agreement (for first-time postdoctoral Trainees appointed to Kirschstein-NRSA training grants only).
- An email is sent to PD/PI and the Trainee. For multi-PIs grants the email should go to the Contact PI and the PI who initiated the 2271.

7. The Agency Processes the Appointment, Re-Appointment, or Amendment

- The Agency can accept the 2271, place it on hold until any required documentation arrives, or return it with comments.
- An email is sent to PD/PI and the Trainee. For multi-PIs grants the email should go to the Contact PI and the PI who initiated the 2271.

8. Where Can I find xTrain Help—User Guide, Quick Reference Guides, FAQs, and Training Materials?

Check out: http://era.nih.gov/training_career/index.cfm.

Trainee Account Registration for xTrain

A. The PD/PI Creates New Appointment for Trainee; Trainee Commons User ID is Unknown or Does Not Exist

- From the *My Grants* screen, the PD/PI selects the **Create New Appointment** link for the chosen grant record and is prompted for the Trainee's Commons User ID on the *Enter Trainee Commons User ID* screen. Since the User ID does not exist or is not known, the PD/PI selects the **Identify Trainee** link instead.
- The PD/PI is presented with the *Identify Trainee* search screen, provides the **Trainee's Last Name** and other known search criteria and then clicks the **Search** button.
- The system searches for potential profile matches and presents the results.
- If a match is identified, the PD/PI selects the **Create New Appointment** link for the matching record and for Trainee:
 - If an eRA Commons account exists for the Trainee, the system will look for the Trainee role and automatically add it, if it is missing. No additional registration processing is needed.
 - If no eRA Commons account is identified for the Trainee, the information already present in the system will be used as the basis for establishing an account.

NOTE: For many years, Agencies have entered data received on paper forms into the eRA databases for internal electronic processing. As a result, eRA databases contain records for individuals without an eRA Commons accounts. During the xTrain Appointment process, these historical records are associated with new accounts.

- If no suitable match is identified, the PD/PI selects the **Create New Trainee Profile** link and the *Create New Trainee Profile* screen is presented. The PD/PI enters the **Last Name, First Name, and Email Address**. The PD/PI also enters the **Middle Name**, if known; clicks **Continue** to be placed in the 2271 form.

Go to **C** below for further instructions.

OR

B. The PD/PI Initiates a Re-Appointment or Amendment; the Trainee Commons User ID is Unknown or Does not Exist

- From the *My Grants* screen, the PD/PI selects the **Re-Appoint 2271** or **Amend 2271** link for the chosen Trainee.
- The PD/PI is placed in 2271 form.
- When the form appears, select the grant year to re-appoint for a re-appointment.

C. PD/PI Invites the Trainee to Register

- The PD/PI enters/updates required information and clicks **Save**.
- The PD/PI is presented with the *Invite Trainee to Register* screen with the following options:

- **Invite Trainee Now:** An email with a link and registration instructions is sent to the Trainee and the PD/PI is placed back in the 2271 form. A **Re-invite Trainee to Register** button is added at the bottom of the form in case the PD/PI needs to resend the invitation for any reason.
- **Invite Trainee Later:** The PD/PI is placed back in the 2271 form and the **Invite Trainee to Register** is added at the bottom of the form for later use.
- The Trainee must be invited to register and must follow the emailed registration instructions before the PD/PI can route the 2271 to the Trainee.

D. Trainee Responds to the Registration Email

- The Trainee receives an email and follows the registration link to create an account.
- The Trainee is presented with a *Create New Account* screen, supplies the requested information, and then clicks **Continue**.
- The system searches for any previous support records and presents the results in the *Verify NIH Support* screen.
- The Trainee marks any identified records as *Correct* or *Incorrect* and clicks **Continue Account Request**.
- The Trainee reviews the information displayed and clicks **Complete Account Request**.

NOTE: It takes 2-5 days for the Agency to process the registration.
