

# Extramural Trainee Reporting and Career Tracking (xTRACT) User Guide

July 1, 2025

**NOTE:** This user guide is an identical PDF version of the online help.

# Contact Us

**Document Comments:** 

We value your feedback on this document.

**How are we doing?** The Communications & Documentation Team of the electronic Research Administration (eRA) is dedicated to serving our community and welcomes your feedback to assist us in improving our user guides. Please send comments about the user guide to this address: <u>eRACommunications@mail.nih.gov</u>.

### **Troubleshooting support:**

Please contact the eRA Service Desk:

Toll-free: 1-866-504-9552

Phone: 301-402-7469

TTY: 301-451-5939

**Web:** <u>http://grants.nih.gov/support</u> (Preferred method of contact)

Email: <u>helpdesk@od.nih.gov</u> (for IMPAC II Support)

Hours: Mon-Fri, 7:00 a.m. to 8:00 p.m. Eastern Time

# Disclaimer STATEMENT

No data shown in illustrations represents any real account, project, or individual. Any resemblance to actual accounts, projects, or individuals is purely coincidental.

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# Latest Updates

#### March 11, 2025

Users can now initiate an Undergraduate Training Grant RTD for a T34 grant for an RPPR, Renewal, or Revision through the Search for Training Grants results. To create a new T34 RTD, users will mark a new checkbox titled, **This RTD is for an Undergraduate Training Grant Application** on the *Initiate New Research Training Dataset* screen. When the checkbox is marked, the resulting RTD will have all RTD screens adjusted to accommodate undergraduate students instead of Pre- and Post-doctoral students. This includes changes to column headings, omission of degree, specification of student type, and more. Topics with changes have notations of the differences. See *Initiate an RTD for New Application* on page 10.

#### December 20, 2024

The ability to add partner organizations and associated faculty

The ability to report faculty that have left the program has been added.

Certain trainee characteristics related to prior academic and research experience are no longer required.

Information on "Those Clearly Associated with the Training Grant" is no longer required.

The following topics have been updated to reflect these changes:

- Participating Departments and Programs (New Application) on page 23
- *Participating Faculty Detail (New Application)* on page 43
- *Participating Faculty Detail (Renewal)* on page 123
- Participating Faculty Detail (Revision) on page 201
- Table 1: Census of Participating Departments and Interdepartmental Programs on page 279
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- Table 7: Appointments to the Training Grant for Each Year of the Current Project Period (Renewal/Revision Applications only) on page 301
- Table 8: Program Outcomes (A-C) on page 303

#### October 1, 2024

The procedure for changing your default organization was updated. The following topic was updated to reflect these changes:

• Changing your Default Organization on page 8

#### October 16, 2023

Online help updated throughout to reflect xTRACT's new look and feel.

# Welcome to Extramural Trainee Reporting and Career Tracking (xTRACT) Online Help

This help system provides online information about the functionality of the Extramural Trainee Reporting and Career Tracking (xTRACT) module. This topic illustrates the use of this online help system.

# Help Icon in Module Leads to Online Help

Access online help by clicking the Help icon, which is a blue circle containing a white question mark, from any screen within the Extramural Trainee Reporting and Career Tracking (xTRACT) module.

III (GRA
Sample Module   Module Home Page
Home Page 🔞
Initiate a Request
Select One 🗸 Go

# **Table of Contents Pane**

Use the table of contents pane at the left of a help system to navigate through topics. If a topic name has a down arrow – next to it, click it to reveal subheadings.

(Cera Online Help	Search Q
About This Online Help Module Overview	Revised: April 24, 2023
Welcome to Sample Module	For additional assistance, please contact the <u>eRA Service Desk</u>
Using Sample Module 🔺 Creating New Files	Module Overview
Opening Files Saving Files	Sample Module This Sample Module is used by all users for facilitate grants applications, grants processing, and grants
Release Notes   System Requirements	management. This module allows for performing all aspects of applying for grants, processing grants, and managing awarded grants.
More Resources	Use the Sample Module for these tasks: <ul> <li>Creating New Files</li> </ul>

When the browser window is narrow, the table of contents pane is hidden. To view a hidden table of contents, click the three-horizontal-line icon at right top to toggle the table of contents between onscreen and hidden.

GRA Online Help	
Search	۹
Revised: April 24, 2023	
For additional assistance, please contact the <u>eRA Service Desk</u>	PDF version

# **Contacting the eRA Service Desk**

Online help pages contain a link to the eRA Service Desk at top. Contact the service desk for help with error messages, system questions, and help solving problems in eRA modules. The link is located above the page title on all online help pages.

Gera Online Help	≡
Search	م
Revised: April 24, 2023	$\leftarrow \rightarrow \boxtimes \boxdot$
For additional assistance, please contact the <u>eRA Service Desk</u>	PDF version

### Viewing all Online Help in a PDF Version

All online help is available in PDF format. The PDF contains identical information as the online help. The PDF is linked at the top right of every online help page with a link named PDF Version.

(era Online Help	≡
Search	۹
Revised: April 24, 2023	
For additional assistance, please contact the <u>eRA Service Desk</u>	PDF version

# **Showing Hidden Text or Images**

You might encounter dropdown text or toggled images in online help. Sometimes, to save screen space and let you focus on the information important to you, online help hides text or images behind linked text.

For instance, click the following heading to see the hidden dropdown text showing steps of a procedure:

#### Creating a New File

1. Click the New button.

- 2. Enter a name for the file.
- 3. Click the Save button.

Images can also be toggled. In the example below, click the words "Access the Edit action by clicking the three-dot ellipsis icon" to see the hidden image.

NAME/NUMBER *	TYPE \$
GENOMICS: 455555555	
GENOMI: 444444444	🕼 Edit

# Tools for Navigating Topics, Showing Hidden Material, and Print-

### ing

Click the left and right arrow icons at top right to go to the previous or next topic in the table of contents:



Click the print icon, below, to print:



Click the expand icon, below, to expand all material that is hidden in a topic.



Click the collapse icon, below, to collapse all material. The collapse icon appears only after clicking the expand icon.



# Search Field

Type text into the search field to find all topics that contain matching text. Then either press the Enter key or click the magnifying glass icon to search.

Search	۹

If you type multiple words in the search field, the search assumes an 'AND' between each word. For example, if you search for *system requirements*, the search does this: Find all topics that contain both *system* **AND** *requirements*, not necessarily adjacent to each other in text. It counts variations of words as a match; for example; *require* or *required* are deemed to be matches for *requirements*.

If you want only topics that contain an exact phrase, enclose it in double quotation marks like this:

"system requirements"

The search field searches ONLY the current help system for the Extramural Trainee Reporting and Career Tracking (xTRACT) module. To search all help systems, go to <u>the</u> <u>eRA website</u> and use the search field at the top of the page.

# **Finding Related Topics**

Most topics contain a Related Topics section, which show links to a list of topics that are related to the one you are viewing.

(GRA Online Hel	p Search Q
About This Online Help Module Overview	Revised: April 24, 2023 🖶 🔿 🔂
Welcome to Sample Module	For additional assistance, please contact the <u>eRA Service Desk</u>
Using Sample Module 🔺 Creating New Files	Module Overview
Opening Files Saving Files Release Notes System Requirements	Sample Module This Sample Module is used by all users for facilitate grants applications, grants processing, and grants management. This module allows for performing all aspects of applying for grants, processing grants, and managing awarded grants.
More Resources	Related Topics <u>Creating New Files</u> <u>Opening Files</u> <u>Saving New Files</u>
	For feedback on the online help, please email the <u>eRA Communications Office</u> .

# **Providing Feedback on the Online Help or PDF**

All topics contain a green feedback footer with an email link to the eRA Communications Office, which creates and updates online help and PDFs. The eRA Communication Office does not provide technical support but is happy to accept feedback on how we might make the online help better meet your needs.

For tech support, contact the <u>eRA Service Desk</u> instead of the Communication Office.

#### Extramural Trainee Reporting and Career Tracking (xTRACT) User Guide

(Cera Online Hel	p Search	٩
About This Online Help Module Overview	Revised: April 24, 2023	
Welcome to Sample Module	For additional assistance, please contact the <u>eRA Service Desk</u>	PDF version
Using Sample Module  Creating New Files	Module Overview	
Opening Files Saving Files Release Notes	Sample Module This Sample Module is used by all users for facilitate grants applications, grants p	
System Requirements More Resources	management. This module allows for performing all aspects of applying for grant managing awarded grants.	s, processing grants, and
more resources	Related Topics  Creating New Files  Opening Files  Saving New Files	
	For feedback on the online help, please email the <u>eRA Communic</u>	ations Office.

# Navigating and Using the UI in eRA Modules

For increased usability, eRA modules are gradually switching to a streamlined, modern, mobile-friendly look and feel for screens. The new look and the new navigation adjust dynamically for a variety of screen or font sizes, making your browsing experience more efficient on the device of your choice. New UI elements offer a consistent set of tools that you can use across modules. A new header and footer conserve space, leaving more work area for you to accomplish your tasks.

This topic explores the new navigation and UI elements that you might see on updated screens. All modules will eventually use the same framework for building the UI and navigation through screens. Older style screens will co-exist with updated screens during the transition to the new look and feel.

#### Read this topic to learn about:

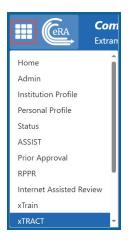
- Header/footer for eRA modules
- Navigation to and within modules
- Actions column and how it might be replaced by an ellipsis (three-dot) dropdown in a row
- Standard tools for tables
- How columns are hidden and shown on small screens

# **Header and Footer Navigation**

The header and footer use symbols to save screen real estate and dynamically adjust to fit smaller screens.

	Commons Extramural Trainee Reporting And Career Tracking	. NIH) National Institutes of Health Office of Extremute Network	0 L L
xTRACT   New Appl	cations Training Grants Persons Institution Data		

The first icon from left is the Apps menu. The Apps menu shows all apps available to the currently logged-in user, shown below:



### **Other Icons in Header**

Links to the Department of Health and Human Services.

Link to grants.nih.gov.

Links to a general eRA Service Desk Support page.

Links to eRA Points of Contact page.

The person icon shows your login information, preferences, and sign out link:

### **Dynamic Header**

Below, on a narrow screen, most items on the header are hidden, but they pop down when you click the grid icon in the upper right, circled below.



Commons xtract	<ul> <li>Help</li> <li>Contact</li> <li>Manage Preferences</li> <li>Sign Out</li> </ul>
Welcome to xTRA	Home
BT1-DT5 loves XTRACT work	Admin
xTRACT is available on a pilot b	Institution Profile
grants, to create data tables for Progress Reports, and most typ	Personal Profile
Testing in TEST for XTRACT	Status
Applicants for renewal T90/R90	ASSIST
career-level training, education, training data tables (e.g., T35, R	Prior Approval
basis, however, they may wish t	RPPR
will include features tailored to	Internet Assisted Review
Public reporting burden for this average 4 hours per response, i	xTrain
searching existing data sources and completing and reviewing	xTRACT
conduct or sponsor, and a perso information unless it displays a	Admin Supp

# **Redesigned Footer**

The footer is clean and offers only essential information organized into columns.

# Navigating Within a Module

The module abbreviation, circled below left, lets you quickly see which module you are working in.



The sections of the modules are listed across the top, with the current section highlighted in gray, circled above.

To navigate to each section, click the section name.

If the screen size is small, all the app section names are collapsed under a three-line icon, shown below.

When clicked, the three-line icon shows all module navigation in vertical form, below.

xTRACT	
New Applications	
Training Grants	
Persons	
Institution Data	

# **Actions Column Replaced by Ellipsis Menu**

Actions that are available for each row in a table might be displayed under a three-dot ellipsis icon instead of an **Actions** column, as shown below.

# **Standard Tools for Tables**

Tables are sleeker with tools for showing the data you want to see. See below for explanations of table tools.

Filter Table	2 Results			<b>1</b>	< 1 of 1 ~ >
Grant Number 🔺	Grant Status 🌻 🛛 Pl I	Name ≑	Project Title 🌻	RTC	) Status 🌻

#### Filter

Entering filter text features instant filtering of the list as you type, with the number of found results updated as you type. The text you type in the filter is highlighted in the table.

×

### **Column Sorting**

Click column headers to sort by that column.

### **Download and Print**

Use the download tool , shown below, to export table data to Excel or PDF, or to print. Data from all columns is exported/printed even if only a subset of columns are visible.

#### **Rows Per Page**

To help avoid scrolling, use the grid tool to specify how many table rows appear per page.

#### **Page Navigation**

Navigate to each page of search results using the following tool:



# What is xTRACT?

Extramural Trainee Reporting and Career Tracking (xTRACT) is a module within eRA Commons used by applicants, grantees, and assistants to create research training tables for inclusion in progress reports and institutional training grant applications.

Because xTRACT is integrated with Commons, it is able to use xTrain appointment and related data to pre-populate some training data for training tables and reports. This includes data related to trainee names, selected characteristics, institutions, grant numbers, and subsequent NIH and other HHS awards. xTRACT also allows manual entry of data not found in Commons or xTrain. Manually entered information is stored in xTRACT and can be re-used when preparing subsequent training table submissions.

If you are a Signing Official (SO), Administrative Official (AO), Business Official (BO), Principal Investigator (PI), or assistant (ASST) in Commons, you have access to the xTRACT module.

This online help does not contain field by field help; for field level help, see the Training Data Tables Instructions here:

- Download Microsoft Word: <u>https://grants.nih.gov/grants/funding/datatables-</u> <u>f/Consolidated\_Training\_Tables.docx</u>
- View PDF: <u>https://grants.nih.gov/grants/funding/datatables-f/Consolidated\_Train-ing\_Tables.pdf</u>

**IMPORTANT:** xTRACT is a tool for creating training tables. Tables generated in xTRACT must be attached to and submitted with the appropriate progress report or application. There is no **Submit** feature in xTRACT.

# **POLICY:**

Advance Notice of Transition to the xTRACT System for Preparing Research Training Data Tables - NOT-OD-18-133

NIH & AHRQ Announce Transition to New Research Training Table Formats for 2016 and Upcoming Release of the xTRACT System - NOT-OD-16-007

# Logging in to xTRACT

Access to xTRACT depends on the type of user. The xTRACT user (applicant, signing official, NIH staff, etc.) can log in using one of four options listed on the eRA Commons login screen.

- To access xTRACT via eRA Commons, first log in to eRA Commons, then <u>navigate</u> to xTRACT via module navigation.
- To access xTRACT via xTRACT 's log in screen, access the login page here, <a href="https://public.era.nih.gov/xtract/">https://public.era.nih.gov/xtract/</a>.

Login wi	th eRA Cre	dentials 👔
Username	:	
Enter Useri	name	
Password:		
Enter Passv	word	0
Login	Clear	
(For Extern	al Users Only)	1
Forgot Pass	sword/Unlock	Account?
		_
	th Federat	ed Account 🕻
Login wi		ed Account (
Login wi		
Login wi		
Login wi Start typing Login	g to search foi	r organization
Login wi Start typin Login		r organization
Login wi Start typin Login	g to search foi	r organization

### Log in with Login.gov

If switching to Login.gov, follow the instructions in *Transitioning To and Using Login.gov* on page 6.

If you attempt to log in with your normal eRA credentials, and you see one of the following screens, then you are being transitioned to mandatory use of Login.gov; see *Transitioning To and Using Login.gov* on page 6.

#### Log in with eRA Credentials

This method uses a username and password that is assigned and maintained by the eRA Commons system. This method is being phased out gradually and eventually all external users must create and associate a Login.gov account, which associates the eRA credentials with the Login.gov account, but uses Login.gov for authentication. See below for instructions.

**NOTE:** If you are an NIH staff member who needs to log in with your NIH network account credentials and you have an active NIH PIV exemption, see <u>Login Screen for</u> <u>Internal Staff</u>, and scroll down to the topic titled, *Log In Using NIH Network Account Credentials (Only available for NIH users who have an active NIH PIV exemption).* 

If you have been provided with a Commons User ID, you can log in to Commons using the **Login with eRA Credentials** section of the login page. This access method is being gradually phased out starting in 2021, but you will retain the eRA credentials and continue to maintain them because they identify you throughout the Commons system.

- 1. Navigate to eRA Commons . (<u>https://public.era.nih.gov/commons/</u>)
- 2. Under Login with eRA Credentials, enter your username in the Username field.
- 3. Enter your password in the **Password** field. By default, passwords display as bullet characters, but you can click the small 'eye' icon next to the password field to see the actual password in clear text.
- 4. Click the **Login** button.

**NOTE:** Commons locks users out after three (3) unsuccessful login attempts.

A successful login shows the username, organization, and user roles in the upper-right corner of each screen when you click the person icon.

0 📞 🚨
Marie Curie
NIH\CURIEMARIE
Current Organization: UNIVERSITY OF PARIS
Roles: Pl
Change Organization
📝 Manage Preferences
🕩 Sign Out

**IMPORTANT:** Are you affiliated with multiple institutions? Make sure that the correct institution is displayed after you log in. This will affect the information you can access in xtract. Refer to the *Changing your Default Organization* on page 8 topic for more information.

After you have signed into Commons, you can access the various modules, links, and help screens, as well as other available links.

**NOTE:** The modules accessible to a user depend on that user's role and privileges.

# Log in with an InCommon Federated Account

This method uses an InCommon federated account (when a user's organization participates in the InCommon federated account login program, which involves using the organization's own credentials). See *Federated Institutions/Organizations Commons Login* for instructions.

# Log In with PIV/CAC or With Network Credentials+PIV Exemption

If you are an internal NIH or Agency user accessing Commons, see the Login Screen for Internal Staff topic.

If you are an NIH staff member who needs to log in with network credentials and you have an active NIH PIV exemption, access the above topic, and scroll down to the topic titled, *Log In Using NIH Network Account Credentials (Only available for NIH users who have an active NIH PIV exemption)*.

# **Session Expiration**

If you are going to be away from your computer for an extended period, save any changes and log out of the system. Work sessions expire after 45 minutes of inactivity. At that time, the system returns to the Commons Login screen.

# Transitioning To and Using Login.gov

Click here to view instructions on Login.gov.

Accessing xTRACT after completing Login.gov account creation and association to eRA account

After you create a Login.gov account and associate your eRA Commons account with it, you must use the Login.gov option on the xTRACT home screen.

- 1. On the xTRACT home screen, click on the **LOGIN.GOV** logo in the login section.
- 2. Log in to xTRACT with your Login.gov credentials (email and password) and the additional authentication method you set up with your Login.gov account. You will be automatically taken to the xTRACT landing screen.

**TIP:** If you do not want to enter a code every time, click the box that states, '**Remember this browser**.' If you use the same browser and computer to log into eRA Commons, Login.gov will remember these settings and not require you to complete the two-factor authentication process each time you log in, and you will directly access xTRACT.

## Troubleshooting login problems with Login.gov

**IMPORTANT:** Make sure your eRA Commons account is active and you know your account password before attempting to complete the Login.gov process; if you are unsure of either, then use the Forgot Password/Unlock Account link on the main Commons login screen to change your password prior to attempting to associate your Login.gov account with your eRA Commons account.

If you tried to log in using Login.gov, and it did not work, please perform the following before contacting the eRA Service Desk:

- 1. Clear your browser cache/history and then close and restart your browser.
- 2. Make sure you are not using a bookmark that points to an older URL address. Delete your bookmark and go to the main eRA system URL directly. For instance:
  - a. https://public.era.nih.gov/commons/
  - b. https://public.era.nih.gov/assist/
  - c. https://public.era.nih.gov/iar
  - d. http://m.era.nih.gov/cmb
- 3. If it still does not work, please contact the eRA Service Desk at <a href="https://grants.nih.gov/support/index.html">https://grants.nih.gov/support/index.html</a>

# Changing your Default Organization

If you are affiliated with more than one organization, it is important to check which organization is currently selected when you log into xTRACT. You can access only the information pertaining to the selected organization. Your default organization is displayed with your user ID information in the upper right corner of xTRACT screens.

**NOTE:** Your default organization can be changed at any time.

To select a specific organization to work with in xTRACT:

- 1. Log into xTRACT.
- 2. Click the **Person** icon in the upper-right corner of the screen. A dropdown is displayed.



3. Click the **Change Organization** link.

The *Change Organization* screen is displayed, listing the names of all organizations with which you are affiliated.

Change Organizatio	on		
	Your current affiliations: Select to change your organization	🗸 - Currer	nt Default
	UNIVERSITY OF MICHIGAN AT ANN ARBOR Role(s): PI IAR		~
	UNIV OF NORTH CAROLINA CHAPEL HILL Role(s): PI SPONSOR IAR		
		Cancel	Save

- 4. Select the organization you want to work with in xTRACT.
- 5. Click the **Save** button to set the organization as your default. In the future, when you log in, you are automatically logged in to your default organization.

# Initiate an RTD for New Application

**IMPORTANT:** Only the Principal Investigator (PI) can initiate a Research Training Dataset (RTD) for a new application.

To initiate an RTD for a new application:

- 1. Select the **New Applications** tab.
- 2. Select the Initiate RTD for New Application link.

хT	RACT New Applications	Training Grants Persons Institution Data
	New Applications	Initiate New Research Training Dataset (RTD) - Application Details 🚱
	Search RTD for New Applications	* Required Fields Project Title *
	Initiate RTD for New Application	
		Description
		500 Characters Remaining
		Opportunity Number
		Institution *
		This RTD is for an Undergraduate Training Grant Application i.e. T34 Cancel Initiate RTD
		Cancel Initiate RTD

Figure 1: Initiate RTD for New Application screen

- 3. Enter the fields as displayed on the Prepare New Research Training Dataset (RTD) screen. Required fields are marked with an asterisk (\*).
  - a. **Project Title** (required)

# b. **Description**

# c. **Opportunity Number**

- d. Institution (required)
- e. **This RTD is for an Undergraduate Training Grant Application i.e. T34.** Mark this checkbox if the RTD is specifically for a T34. T34 RTDs will exhibit several differences in behavior and display throughout xTRACT and in resulting PDF forms:

- Table headings on various screens will list "Undergraduate" instead of PreDoc or PostDoc.

- The RTD navigation on the left lacks the "Applicants and Entrants" section. The items counted on Applicants and Entrants correspond to Table 6; Table 6 is omitted from T34 training forms.

- Outcomes count only positions that were awarded ore appointed.
- Columns that specify "Degree" are omitted.

- Where Student Type is listed, you see an Undergraduate ( Undergraduate) badge instead of Post-doc or Pre-doc.

# 4. Select the **Initiate RTD** button.

You will see a message at the top of the screen confirming that your RTD has been initiated.

# Search RTD for New Applications

To search for RTDs for new applications:

- 1. Navigate to the **New Applications** tab.
- 2. Select the Search RTD for New Applications link to display search parameters.

xTRACT   New Applications	Training Grants Persons Instituti	ion Data	
New Applications	Search Research Training	g Data Sets for New Applications (	0
Search RTD for New Applications	New Data Set Identifier		New Data Set Project Title
			abcd% or %abcd% or ab%cd%
Initiate RTD for New Application			Use '%' as a wildcard character.
	PD/PI Last Name		
	abcd% or %abcd% or ab%cd	%	
	Use '%' as a wildcard character.		
	Clear Search Criteria Searc	ch New RTDs	
	RTDs of New Application	ns	
	Filter Table	0 Results	
	RTD ID A Status 🗘	Project Title	¢ PD/PI Name ♀
		No new RTDS found, Please re	refine your search criteria and search for new RTDs.

Figure 2: Searching for New Applications

- 3. Enter search parameters to narrow the results.
  - a. New Data Set Identifier
  - b. New Data Set Project Title
  - c. PD/PI Last Name

**TIP:** You can use the percent sign (%) as a wild card at the start, end, and middle of your criteria.

#### 4. Select the **Search New RTDs** button.

New RTDs display in a table on the screen. If no matches are found, the following message appears: Nothing found to display.

The information presented in the results includes:

- New Data Set Identifier
- Project Title
- PD/PI Name
- Status
- Action links

New Applications	Search Resear	ch Training Data Sets for N	lew Applications 😮	
Search RTD for New Applications	New Data Set Ide	entifier	New Data Set Project Ti	tle
Initiate RTD for New			abcd% or %abcd% or a	
Application	PD/PI Last Name		Use '%' as a wildcard charact	er.
	Curie Use '%' as a wildcard Clear Search Crit			
	RTDs of New A	Applications		
	Filter Table	3 Results		★ (1 of 1 ~ )
	RTD ID 🔺	Status 🌩	Project Title 🌻	PD/PI Name 🌻
	12345	In Progress	Long-Term Effects of Radium Exposure on Nearby Inhab	itants Curie, Marie
	12356	Einalized	Long-Term Effects of Radium Exposure on Nearby Inhab	itente Curie Marie

Figure 3: RTDs for New Applications - Search Results

The options available in the **RTD ID**column will vary depending on the role of the user (whether they have edit or view privileges) and the status of the RTD (whether it is in progress or finalized). Potential options include:

# • Prepare RTD for New Application

Click the linked RTD ID number for an in progress application to continue preparing an RTD.

# • View Training Tables

Click the linked RTD ID number for a finalized RTD to view the training tables for a New Application.

# • Dunfinalize New Application button

This button is available to users (PD/PIs and their ASSTs) with the permission to unfinalize an RTD that has been marked as Final.

# Search for Training Grants

Use the *Search for Training Grants* feature to prepare RTDs for use in revisions and renewals or in Research Performance Progress Reports (RPPR).

1. Select the **Training Grants** tab.

The *Search for Training Grants* screen displays with search parameters for **Grant Number** and **PD/PI Last Name**.

For an ASST, an additional search criterion of *Delegator* also appears. This allows the ASST to filter results to a specific PI who has delegated access to them. This is a drop-down which defaults to blank, but includes the names of all PIs who have delegated access to the ASST.

2. Optional: Enter the appropriate search parameters. This is not required.

# Grant Number

- Type
- Activity Code

T32 is the default value.

- IC Code
- Serial Number
- Support Year
- Suffix

PD/PI Last Name: Enter the last name of the PD/PI associated with the project.

**TIP:** You may use the percent sign (%) as a wild card at the start, at the end, or in the middle of your criteria.

3. Select the **Search Training Grants** button.

Training Grants							
Search Training Grants	Search	for Training Grants to	work	on or view Rese	earch Training I	asets (RTDs) 😢	
	Grant Nu	mber					
	Туре	T32 - Instituti 🗙 🗸	IC	Serial #	Year	ıffix	
	PD/PI Las	st Name					
	e.g. abc	% or %abc or ab%cd					
	Use '%' as a	a wildcard character.					
							Clear QSearch Training Grants

# Figure 4: Searching Training Grants

All records matching the entered search criteria (if any) display in the hit list below the search criteria. These records are limited by the privileges associated with your account. If no programs meet the entered criteria, the following message displays: Nothing found to display.

ſ	Training Grants									
	Search Training Grants	Search fo	or Training	Gran	ts to work o	n or view Research	n Training	Datasets (RTDs) 😮		
		Grant Nun	ıber							
		Туре	T32 - Institu	iti ×	✓ IC	Serial #	Year	Suffix		
		PD/PI Last	Name							
		e.g. abc%	or %abc or	ab%cd						
		Use '%' as a	wildcard chara	ter.						
									Clea	QSearch Training Grants
		Filter Tabl	e	1	2 Results				•	I of 1 ∨ >
		Grant Nur	nber 🕈	Gra	nt Status 🗘	Pl Name 🗘		Project Title 🗘		RTD Status ≑
		1T230D45	6789-15	• Awa	arded	Curie, Marie (Contact) Curie, Pierre		Long-Term Effects of Radium Exposure on Nearby Inhabitants		Not Started (FRPPR/IRPPR)
						Sklodowska, Salomea				Not Started (Revision) Not Started (Renewal)
		1T230D45	6789-17 •	• Per	ding	Curie, Marie (Contact)		Long-Term Effects of Radium Exposure on Nearby		In Progress (RPPR)
						Curie, Pierre Sklodowska, Salomea		IIIIasitalita		

Figure 5: Searching Training Grants - Results

The training grants are presented in a table and include the following related information:

- Grant Number
- Grant Status
- PI Name
- Project Title
- RTD Status

The three-dot ellipsis button next to the grant number presents the options to perform several tasks. These tasks are limited to the role associated to your account. You may see all or some of the following links:

# • Prepare for RPPR

Use this link to prepare the RTD for the progress report. The link appears when the training grant is awarded, the next support year is pending, and RTD preparation for the RPPR has not been initiated.

### • Continue for RPPR

Use this link to continue an RTD already in progress. The link appears when the RTD for the progress report has been initialized but is not final.

#### • Prepare for Revision

Use this link to prepare the RTD for a revision. The link appears when the training grant is awarded and an RTD preparation for a revision has not been initiated.

### • Continue for Revision

Use this link to continue an RTD already in progress. The link appears when the RTD for a revision has been initialized but is not final.

# • Prepare for Renewal

Use this link to prepare the RTD for a renewal. The link appears when the training grant is awarded, has entered or will soon be entering its final non-competing year, and an RTD preparation for a renewal has not been initiated.

#### • Continue for Renewal

Use this link to continue an RTD already in progress. The link appears when the RTD for a renewal has been initiated but is not final.

#### • View Tables

Use this link to view the training tables for an RPPR, Revision, or Renewal. The link is available once the RTD has been marked as final.

# • Unfinalize

This link is available to users having the permission to unfinalize an RTD for an RPPR, Revision, or Renewal that has been marked as Final.

# Prepare RTD for a New Application

Use the links listed under **RTD** on the left side of the screen to maintain the specific sections of the RTD:

- Application Details
- Participating Departments/Programs
- Training Support & Summary
- Participating Faculty
- Participating Students
- Applicants and Entrants
- Preview PDF
- Finalize RTD

Selecting the links above opens the specific section of the RTD. From within, you can add, edit, and/or remove data.

xTRACT New Applications	Training Grants Persons Institution Data
RTD	< Back to search results
Application Details	Prepare Research Training Dataset (RTD) for New Application
Participating Departments / Programs	PD/PI         Institution           12382 - Exploring the Effects of Long-Term Radiation Exposure in         Curle, Marie         UNIVERSITY OF PARIS
Training Support & Summary	Nearby Inhabitants
Participating Faculty	Application Details 😯
Participating Students	* Required Fields
Applicants and Entrants	Project Title *
Preview PDF	Exploring the Effects of Long-Term Radiation Exposure in Nearby Inhabitants
→ Finalize RTD	PI(s) *
	<b>2</b>
	Courie, Marie
	oure, mare
	Description
	500 Characters Remaining
	Opportunity Number
	Cancel Save

Figure 6: RTD Links for New Applications

# **Application Details (New Application)**

The Application Details section includes:

- Project Title
- PI(s)

Added PIs are read-only. Use the **Add PI** button to include additional PIs. Links are also available for removing a PI and setting the PI as the Contact. Refer to the steps below.

• Description

The optional description field is provided so that you can add a meaningful description of the purpose of the RTD. This information is used only within xTRACT and is not part of the data submitted with the training grant application.

# • Opportunity Number

For informational purposes only. There are no restrictions for submitting an RTD based on the NOFO.

Update the fields as appropriate and select the **Save** button.

xTRACT New Applications Tr	raining Grants Persons Institution Data
RTD	< Back to search results
Application Details	Prepare Research Training Dataset (RTD) for New Application
Participating Departments / Programs	New RTD         PD/PI         Institution           12382 - Exploring the Effects of Long-Term Radiation Exposure in Curle, Marie         UNIVERSITY OF PARIS
Training Support & Summary	Nearby Inhabitants
Participating Faculty	Application Details 😮
Participating Students	* Required Fields
Applicants and Entrants	Project Title *
Preview PDF	Exploring the Effects of Long-Term Radiation Exposure in Nearby Inhabitants
→ Finalize RTD	PI(s) *
	Image: Contact)     Add Pl       Curie Marie     Add Pl
	Description
	Environmental health research in which an unpredictable event or policy change provides a limited window of opportunity to collect human biological samples or environmental exposure data.
	313 Characters Remaining
	Opportunity Number
	RFA-ES-23-004
	Cancel Save

Figure 7: Prepare RTD for New Application

# Add PI

To add a PI from a search:

- 1. Select the Add PI button.
- 2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the check mark from the box titled **Search for persons who have a Commons affiliation with my institution**.

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

Search Criteria		
<ul> <li>At least one marked field is required to perform</li> </ul>	n person search.	
Commons User ID *	Person ID *	
abcd% or %abcd% or ab%cd%		
You can perform a wildcard search on Commons U	ser ID.	
First Name	Middle Name	Last Name <b>*</b>
		smith
		You can perform a wildcard search on Last name.
Search for persons who have a Commons	affiliation with my institution	
Search for persons who have a commons	anniation with my institution	

Figure 8: Search for Persons

All matching records display in the **Person(s)** table. Only persons with a Commons role of PI will be returned in the search.

earch Res <b>ersons</b>						
Filter Tab	le	6 Results			<b>*</b> 🖽	< 1 of 1 ~ >
Add to RTD 🔺	Person Name	≜ ▼	Commons User ID 🌲	Person ID \$	Commons Institution 🗢	Email 🌻
	Curie, Marie		CURIEMARIE		University of Paris	eRATest@m ail.nih.gov
	Curie, Pierre		CURIEPIERRE		University of Paris	eRATest@m ail.nih.gov

Figure 9: Search for Persons with Results

3. Select the **Add to RTD** checkbox for each person you wish to add, then click the **Add Person(s)** button. The selected person(s) are added to the PI(s) in the Application Details.

# Set a Contact Pl

If your application has multiple PIs, you can set a PI as the Contact.

 In the Basic Information section of the RTD, find the PI you wish to set as Contact. Click the 
three-dot ellipsis Actions button and select Set as Contact PI.

# Remove a PI

If your application has multiple PIs, you can remove a PI.

**NOTE:** You cannot remove the PI designated as Contact PI. You must first change the Contact PI to another person.

- In the Basic Information section of the RTD, find the PI you wish to remove. Click the end three-dot ellipsis Actions button and select Remove PI.
- 2. The PI is removed.

# Participating Departments and Programs (New Application)

Use this section to add/remove partner organizations and departments and programs.

# **Adding Partner Organizations**

If you are working with another organization, you must add the organization before you can add participating departments and programs from that organization.

If you are not working with another organization, you should not add any partner organizations.

- 1. Select **Participating Departments/Programs** on the left.
- 2. In the **Partner Organizations** pane, click the **Add Partner Organization** button. The Add Partner Organization pane is displayed.
- 3. Click the **Organization** field and begin entering all or part of the organization's name. The dropdown filters to display a list of matches.
- 4. Select the appropriate organization.
- 5. Click the **Save** button. The organization is added to the Partner Organizations pane.
- 6. Repeat for any additional partner organizations.
- 7. To delete a partner organization, click its **Delete** button.

**IMPORTANT:** Deleting a partner organization will delete all data associated with the organization, including departments, programs, and characteristics and census totals.

# **Adding Departments or Programs**

- 1. Select **Participating Departments/Programs** on the left.
- 2. Select the Add Participating Departments or Programs button.

Required field(s)	
Partner Organization	
Select	
Select Department or Program *	
Include Departments	
Include Programs	
Department 🗕 Program	
Begin typing and select all that apply	

Figure 10: Adding Departments

3. If you wish to add a department or program at a partner organization, click the **Partner Organization** dropdown and select the appropriate organization. If you do not select a partner organization, the departments and programs listed will be for the applicant organization.

**NOTE:** If you are working with partner organizations, you must complete steps 4-7 to add departments or programs for each organization separately. Selecting a different organization before you save will remove the currently selected departments or programs.

4. Start typing in the Choose your Department or Program field. The system will display a list of departments and programs with that character string in a dropdown menu. Major Components are also displayed with the Department to differentiate among departments with the same name in different units of the organization.

**TIP:** Use the **Include Departments** and **Include Programs** checkboxes to limit your search if desired.

Add Participating Departments and Programs	$\times$
* Required field(s)	
Partner Organization	
HARVARD SCHOOL OF PUBLIC HEALTH	
Select Department or Program *	
Include Departments	
🗹 Include Programs	
▲ Department ● Program	
pol	
Health Policy And Management	
Cancel	Save

Figure 11: Searching for Departments

- 5. Find the appropriate department or program in the results list drop-down and click to select it.
- 6. Repeat steps **3-4** if you wish to add multiple departments or programs.

Add Participating Departments and Programs	×
* Required field(s) Partner Organization	
HARVARD SCHOOL OF PUBLIC HEALTH	
Select Department or Program *	
Include Departments	
Include Programs	
▲ Department ● Program	
× Health Policy And Management × Center For Radiatiation Sciences ×	
Cancel	Save

7. Click the **Save** button to complete the selection and close the screen.

The *Participating Departments and Programs* screen updates to show the added department(s) in a table. Added programs and departments display in the same table.

8. To delete a department or programs, click its **Delete** button.

# **Creating Departments or Programs**

**NOTE:** You can only add departments and programs for your own organization. To add a department or program for a partner organization, contact the organization's signing official.

1. Select the Add Participating Departments or Programs button.

Required field(s)		
artner Organization		
Select		
elect Department or Program *		
Include Departments		
Include Programs		
Department 🗕 Program		
Begin typing and select all that apply		

Figure 12: Add Participating Departments or Programs Button

- 2. Start typing in the **Choose your Department or Program** field. The system will display a list of departments and programs with that character string in a drop-down menu.
- 3. To add a Program not available in the search results:

a. Select **Create One**. The Add Participating Departments and Programs screen is displayed.

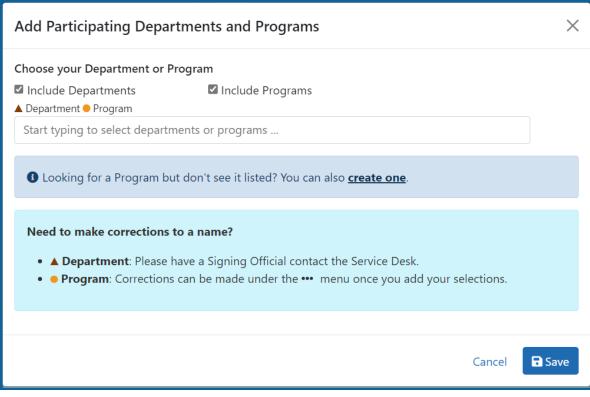


Figure 13: Searching for Programs Displaying Create One Hyperlink

b. Add Program Name (required) and Program Description (optional).

Add Participating Departments and Programs		×
Create Program, to be added to my list of participating programs on this RTD * Required field(s) Program Name *	0	
Radiology		
Program Description		
250 Characters Remaining		1.
Cancel	← Go Back Sav	e

Figure 14: Adding a Program

- c. Click the **Save** button. The program is created and added.
- d. Click the **Save** button to save the selected departments and programs to the RTD.

The *Participating Departments and Programs* table updates to show the added program (s). Added programs and departments display in the same table. A for three-dot ellipsis button is displayed for each item; it contains links for removing and editing the census for the programs and departments.

# **Edit Departments & Programs**

To edit a program or department, click the et three-dot ellipsis button and select **Edit Census**.

Participating Departments and Programs 😮	
Participating Programs and Departments have been successfully saved.	×
Filter Table 2 Results	📩 🖽 < 1 of 1 🗸 >
Department or Program Name 🔺	Туре ≑
Neurology/School Of Medicine	••• Department
Radiology	Edit Census  Edit Census  Remove Department nts or Programs

Figure 15: Edit Census for Programs and Departments

#### **Faculty**

- Total
- Participating

#### **Predoctorates**

- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty

#### **Postdoctorates**

- Total
- Supported by any HHS Training Award
- Postdocs with Participating Faculty
- Eligible Postdocs with Participating Faculty

#### **Undergraduates (replaces Predoctorates and Postdoctorates for T34s only)**

- Total
- TGE Undergrads Supported by this Training Grant
- Supported by any federal STEM Training Award

articipating Departmen	t Census: Neurology/Schoo	ol Of Medicine 😮			×
Faculty					
Total	Participating				
0	0				
Predoctorates					
			Eligible Pre-docs		
Total	Supported by any HHS Training Award	With Participating Faculty	with Participating Faculty		
0		0	0		
Postdoctorates Total	Supported by any HHS Training Award	With Participating Faculty	Eligible Post-docs with Participating Faculty		
0	0	0	0		
				Cancel	Save

*Figure 16: Participating Department/Program Detail* 

Select the **Save** button to save the information.

# **Training Support & Summary (New Application)**

# **Summary Statistics**

Displays the read-only totals of the following:

- Total Number of Pre-doc Positions
- Total Number of Post-doc Positions
- Total Number of Short-Term Positions
- Average Grant Support per Participating Faculty Member

The **Average Grant Support per Participating Faculty Member** is the mean of the Current Year Direct Costs in Research Support for each Faculty member.

The total number of positions represent the sums of the positions entered for each Institution Training Grant.

Training Support & Summary 😧	
✓ Summary Statistics	
Total Number of Pre-doc Positions 🚯	0
Total Number of Post-doc Positions 🚯	0
Total Number of Short-Term Positions ()	0
Average Grant Support per Participating Faculty Member 🕕	\$0

Figure 17: Training Support & Summary

# Institutional Training Support Detail

To add currently active, federal institutional training, career development, or research education support available to the participating faculty members:

1. Select the **Add Institutional Training Support** button in the **Institutional Training Support Detail** section.

$\checkmark$ Institutional Training S	upport Detail			
NIH and Other Agen	cy Sources of Support on Record			
Filter Table	1 Results		4	L 🖪 < 1 of 1 ~ >
Grant Title 🔺		Award Number 🌻	Project Period 🗘	PD/PI ≑
Long-Term Effects of Radiur	m Exposure on Nearby Inhabitants	T32AA00 -26	04/1997 to 03/2028	Curie, Marie
			+ /	Add Institutional Training Support

Figure 18: Add Institutional Training Support Button

- 2. Search for support by entering any of the criteria on the *Add Institutional Training Support* pop-up. You must enter either an IC Code or PD/PI Last Name.
- Activity Code
- IC Code
- Serial Number
- Suffix Code
- Start Date

- End Date
- PD/PI Last Name
- Institution

**TIP:** As you type an institution name, a drop-down list of potential matches will begin to populate. Select the institution from that list.

Either IC Code or PD/PI Last	nding Sources		
Activity Code	IC Code *	Serial Number	Suffix Code
Start Date	End Date	PD/PI Last Name *	
mm/dd/yyyy	mm/dd/yyyy		
nstitution			
Select One			

Figure 19: Searching for Funding Sources

3. Select the **Search Funding Sources** button. A list of matches is displayed.

	g Sources Sear				
Filter Table	1 Results				1 of 1 ⋎
Grant Number 🔺	PD/PI \$	Project Title 💲	Institution ≑	Project Start Date  ≑	Project End Date  ≑
T32AA007573 🕇	Curie, Marie	Long-Term Effects of Radium Exposure on Nearby Inhabitants	UNIVERSITY OF PARIS	04-01-1997	03-31-2028
		-			

- 4. Select the **Select this Funding Source** button next to the grant number. The added source of support is displayed on the *Training Support and Summary* screen.
- 5. To remove the funding source, click the **E** Remove Institutional Training Support button next to the grant title.
- 6. To edit the funding source, click the hyperlinked grant title.

Additional detail can be found in the Institutional Training Support Detail section.

# **Census Totals**

Displays totals for Faculty, Predoctorates, and Postdoctorates. If you are working with a T34 RTD, the labels reflect Undergraduates instead.

Faculty		
Total	0	
Participating	0	
Please provide numbers for unique faculty	nembers across the participating departments and interdepartment	
		Edit
Pre-doc		
Fotal		0
Supported by any HHS Training Award		0
Total Predoctorates with Participating Fa	culty	0
Eligible Students with Participating Facu	ty	0
TGE Predocs Supported by this Training	Grant	0
Post-doc		
Total		0
Supported by any HHS Training Award		0
Total Postdoctorates with Participating F	aculty	0
ligible Postdocs with Participating Facu	ty	0
IGE Postdocs Supported by this Training	Grant	0

# **Faculty**

- Total
- Participating

Use the **Edit** button to add to or update the numbers for unique faculty members across participating departments and interdepartmental programs.

# Pre-doc

The following read-only information is displayed. This data is maintained on the **Par-ticipating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Predoctorates with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

#### Post-doc

The following read-only information is displayed. This data is maintained on the **Par-ticipating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Postdoctorates with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

### **Undergraduates (replaces Pre-Doc and Post-doc on T34 grants only)**

The following read-only information is displayed. This data is maintained on the **Par-ticipating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- TGE Undergrads Supported by this Training Grant
- Supported by any federal STEM Training Award

# Institutional Training Support Detail (New Application)

Click the linked grant title in the **Institutional Training Support Detail** section of the *Training Support & Summary* to open the *Editing* screen.

**NOTE:** The screen varies between T34 (undergraduate training grant) and other types of training grants. T34s have only undergraduates, so field labels are changed to reflect undergraduate students instead of doctoral students if you are working on a T34.

Prepare Research Training Dat	aset (RTD) for New App	lication		
<b>New RTD</b> 12498 - Exploring the Effects of Long- Nearby Inhabitants	Term Radiation Exposure in	PD/PI Curie, Marie	Institution UNIVERSITY OF PARIS	
Institutional Training Support Detail	9			
Project Title: Long-Term Grant Number: T32AA00	Effects of Radium Exposure on N -01	learby Inhabitants		
$\checkmark$ Number of Trainee Positions				
Number of Pre-doc Positions		0		
Number of Post-doc Positions		0		
Number of Short-Term Positions		0		
Number of Participating Faculty		0		
				Edit
$\checkmark$ Overlapping Faculty				
Filter Table 0 Result	ts			
Overlapping Faculty Name 🔺				
		No data available in table		
			l	Add Overlapping Faculty

Figure 20: Institutional Training Support Detail

# **Number of Trainee Positions**

Use this section to add the number of Predoc, Postdoc, Short-term trainee positions, and Participating Faculty positions.

- 1. Select the **Edit** button.
- 2. In the *Institutional Training Support* pop up, enter the appropriate totals.
- 3. Click the **Save** button.

# **Overlapping Faculty**

Use this section to update the names and number of overlapping faculty.

✓ Overlapping Facul	у	
Filter Table	0 Results	
<b>Overlapping Faculty</b>	Name 🔦	
	No data av	ailable in table
		Add Overlapping Faculty

Figure 21: Add Overlapping Faculty Button

1. Select the **Add Overlapping Faculty** button. The Add Overlapping Faculty screen is displayed.

Person Name		Commons User ID	Person ID	Email
Sklodowska, Salomea	+	SKLODOWSKAS	1234567	eRATest@mail.nih.gov
Curie, Pierre	+	CURIEPIERRE	1234568	eRATest@mail.nih.gov

Figure 22: Add Overlapping Faculty screen

2. Select the **Add Overlapping Faculty** button for any participating faculty members that are also on the Institution Training Grant.

**TIP:** If a needed faculty member does not display in the results, then add the faculty member as Participating Faculty as described in the topic titled *Refer to How Do I Manage Participating Faculty Members (New Application)? on page 38* for new applications.

The table updates to indicate that the faculty member has been added.

Person Name		Commons User ID	Person ID	Email
Sklodowska, Salomea	0	SKLODOWSKAS	1234567	eRATest@mail.nih.gov
Curie, Pierre	+	CURIEPIERRE	1234568	eRATest@mail.nih.gov

Adding Participating Faculty

3. Select the **Close** button.

The Overlapping Faculty Name displays on the *Institutional Training Support Detail* screen with the option to **Remove** the overlapping faculty member. The updated total count of the overlapping faculty is calculated by system and is displayed as read-only.

# How Do I Manage Participating Faculty Members (New Application)?

Select the *Participating Faculty* link from the **RTD** menu on the left of the screen. This will open the *Participating Faculty Members* table and display the participating faculty added to the RTD - or a message indicating that no faculty have been added, when appropriate.

arch RTD for New oplications	New RTD ·	419 The Effects of Romulan Ale on Senio	or Staff		
tiate RTD for New oplication	PD/PI	Shorts, Jim			
D-	Participating Fac	culty Members 🛛			
isic Information					
articipating epartments / ograms	Add Faculty				Showing 1 - 7 of tota
aining Support &	Person Name	Commons User ID	Person ID 🔶	Email 💠	Action
inticipating Faculty	White, Snow	WHITESNOW	1234567	eRATest@mail.nih.gov	Edit Remove
	White, Grumpy	WHITEGRUMPY	2345678	eRATest@mail.nih.gov	Edit Remove
rticipating Students	White, Doc	WHITEDOC	3456789	eRATest@mail.nih.gov	Edit Remove
plicants and Entrants	White, Sleepy	WHITESLEEPY	4567890	eRATest@mail.nih.gov	Edit Remove
eview PDF	White, Happy	WHITEHAPPY	5678901	eRATest@mail.nih.gov	Edit Remove
alize RTD		WHITEBASHFUL	6789012	eRATest@mail.nih.gov	Edit Remove

Figure 23: Participating Faculty Members

# How Do I Add Faculty?

**TIP:** Faculty may be added individually or via a Bulk Upload.

# How Do I Add Faculty Individually?

- Select the Add Faculty button.
  - 1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution**.

**NOTE:** You must enter a Commons User ID, Person ID, or Last Name to perform a search.

2. Select the **Search Persons** button.

Search for Faculty			×
e 🚍 Search Criteria			
* Either Commons User ID or Person ID * Commons User ID	or Last Name is required to perform person search.		
First Name 2	Middle Name	* Last Name Shorts%	
Search for persons who have a Com	mons affiliation with my institution		
For example: abcd% or %abcd% or ab%c	mmons ID or Last Name, by using the "%" character. d%.		
Search Persons Clear			
3	J		Close

#### Figure 24: Search for Faculty

 All matching records display in the Person(s) table. Select the Add to RTD check box for the person you wish to add, then click the Add Person(s) button. The person is added to the Participating Faculty Members list.

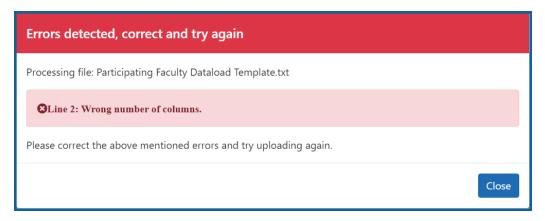
### How Do I Add Faculty Via a Bulk Upload?

- Select the **Upload Participating Faculty** button below the table.
  - The next screen will display the RTD and PD/PI information in the top section. The bottom section, under "Upload Participating Faculty ", contains notes regarding how to perform a bulk upload. Click the **Show More** link for instructions on creating and formatting a tab-delimited file, as well as a link to download a tab-separated (TSV) text template file (.txt). Use these tools to create the upload file.

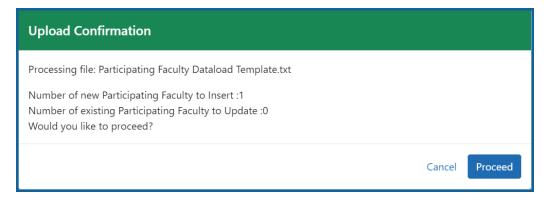
Prepare Re	esearch Training Dataset (RTD) for Revision
RTD	5T32DK123456-15 Gene therapy training: CF and genetic diseases
PD/PI	L'amour, Louis
Upload F	aculty Members
<ul> <li>The file how to d</li> <li>Includin</li> <li>The tab- Training and Rel Careers</li> <li>The Cor</li> <li>If the sa</li> <li>If it is pr Profess</li> <li>If it is pr</li> <li>If they ai Predocs</li> <li>Continu accepte</li> <li>If it is pr for Exect</li> <li>Faculty update fi</li> <li>The dat</li> <li>If the up will only</li> </ul>	mmons User Id is required for each uploaded faculty member. The other columns may be left blank, as appropriate. me Commons ID is provided for multiple entries in the upload file, an error will be reported. ovided, the Rank must be one of the following (without quotations): "ASTP" for Assistant Professor. "ASSP" for Associate or. "PROF" for Professor. "REAP" for Research Assistant Professor. "INST" for Instructor. ovided, the Research Interest must be 240 characters or less. re provided, each of the component values of the mentoring record fields (Predocs in Training, Predocs Graduated, s Continued in Research and Related Careers, Postdocs in Training, Postdocs Completed Training, Postdocs ed in Research and Related Careers) must be a whole positive number (or zero). No fractional portions can be

- 2. Once the upload file has been prepared, use the **browse** link to select and upload the file.
- 3. If there are any errors in the upload file, a message will appear above the filename with a link to details of the errors. These errors will need to be cor-

rected before the upload will succeed.



4. If the upload is accepted, a confirmation message will display. The name of the upload file will display in the field above the **Browse** button.



Click the **Proceed** button. The values from the uploaded document will be updated in the appropriate *Participating Faculty Detail* tables as well. (Rank, Research Interest, Training Roles, Predocs in Training, Predocs Graduated, Predocs Continued in Research and Related Careers, Postdocs in Training, Postdocs Completed Training, and Postdocs Continued in Research and Related Careers)

5. To validate that the table and the details updated correctly, click on the *Participating Faculty* link again in the left-side menu.

## How Do I Edit Faculty Members?

Click the hyperlinked faculty member name to edit the participating faculty details for the selected member. Refer to the topic titled Refer to *Participating Faculty Detail (New* 

Application) on page 43.

# How Do I Remove a Faculty Member?

Select the **E** Remove Participating Faculty button to remove the faculty member from the RTD. At the confirmation, select **Delete**.

# Participating Faculty Detail (New Application)

Use the **Expand** button next to each section of the *Participating Faculty Detail* to display it. The **Open All Sections** link reveals all collapsed sections at once.

Prepare Research Training Dataset (F	RTD) for New Application		
New RTD 12498 - Exploring the Effects of Long-Term Rac Nearby Inhabitants	PD/PI diation Exposure in Curle, Marie	Institution UNIVERSITY OF PARIS	
Participating Faculty Details ?			
Sklodowska, Salomea Commons User ID SKLODOWSKAS	<b>Email</b> eRATest@mail.nih.gov	<b>Rank</b> None	
Primary Department or Program None	Research Interest None	Training Role(s) None	Edit
N Forulty Domes			Open All Sections
> Faculty Degree			
> Research Support			
> Mentoring Record			

Figure 25: Participating Faculty Details

Each section provides a means for editing the information. Refer to the steps below.

## **Participating Faculty Details**

The **Participating Faculty Details** panel of the *Participating Faculty Detail* displays faculty data as described below.

- Commons User ID (read only)
- Email (read only)
- Rank
- Primary Department or Program
- Research Interest
- Training Role(s)

To edit faculty member data:

1. Click the **Edit** button to open the *Edit Faculty Member Data* window:

Edit Faculty Member Data	×
* Required Field	<b>A</b>
Rank *	
Select	
<ul> <li>Applicant Organization (UNIV OF NORTH CAROLINA CHAPEL HILL)</li> <li>Partner Organization(s)</li> </ul>	
Primary Department or Program	
Select Program department or program	
Looking for a Program but don't see it listed? Navigate to the Departments and Program's tab to Create a Program.	
Research Interest	
enter text	
200 characters remaining	10
Training Role	
PD/PI	
Preceptor	
Executive Committee member (Exec. Comm.)	
Other Committee member (Other Comm.)	
Other	•
Cancel Gancel	ive

 Select an academic rank from the **Rank** drop-down list, or, if the faculty member does not have an academic rank, select **Other** from the **Rank** drop-down, and type the position title in the **Other Rank Title** field.

This lets you provide more accurate position information about grant faculty who

hold non-academic positions, such as in government or the private sector. The

Other Rank field is enabled only if you select Other in the Rank drop-down list.

- 3. Select the appropriate radio button for the faculty member's organization.
  - a. If you select the **Partner Organization(s)** radio button, the Partner Organization dropdown is displayed. Select the appropriate organization.
- 4. In **Primary Department or Program**, specify a department or program for the faculty member. Type a few letters to see matches from the faculty member's institution. Matches are based on programs previously entered into xTRACT or other eRA modules.
- 5. Enter the faculty member's area of focus in the **Research Interest** field.
- 6. Select the **Training Role** the faculty member holds for the grant currently being edited. Preceptor is also sometimes referred to as mentor.
- 7. Click the **Save** button.

#### **Faculty Degree**

From this panel, you may add a degree, edit a degree, or select a degree to add to an RTD.

1. Click the **Expand** button to view the panel.

Filter Table	3 Results			<b>*</b> E	<b>1</b> of 1 ~ >
Degree 🔷	Institution ≑	Date Degree Received 🌲	Status ≑	Include in RTD 🗘	Source 🌲
DOCTOR OF PHILOSOPHY			Completed		Commons Profile
REGISTERED NURSE			Completed		Commons Profile
MASTER OF SCIENCE			Completed		Commons Profile

The **Source** of degrees is displayed as read-only and as either *xTRACT* (meaning that the degree was added to the person profile in xTRACT) or *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

#### Add a Degree

- 1. Select the **Add Degree** button.
- 2. Update the fields in the *Add a Degree* pop-up:
  - Degree: Select from the list
  - **Other Degree Text**: Enter if the Degree selected is OTH (other type of degree) or another category like *BOTH*, *DDOT*, *DOTH*, *MDOT*, *MOTH*, and *VDOT*.
  - **Degree Date**: Enter in MM/YYYY format
  - **Terminal Degree**: Select the **Yes** or **No** radio button as appropriate. When the **Yes** button is selected, the terminal degree indicator (This is the terminal degree of this person.) displays next to the degree details in the view. Only one degree for a person can be set as the Terminal Degree.
  - **Degree Status**: *Completed* or *In Progress* are the selections available for Faculty degrees.
  - Include in RTD: Yes or No are the options available.
  - **Degree Institution**: Enter the institution name, one institution per degree. Start typing in some of the institution's name and a drop-down menu displays with related institution names.
- 3. Select the **Save** button to save your changes.
- 4. Repeat for any additional degrees.

## Edit a Degree

- 1. Click the hyperlinked degree name to display the *Edit Degree* screen for editing.
- 2. Update the fields as necessary.
- 3. Select the **Save** button or click the **Cancel** button.

#### Include in RTD

- 1. Locate the degree you are including in the RTD.
- Check the Include in RTD box for the degree to be displayed in the Participating Faculty Members Training Table on the RTD PDF.

Uncheck the box to exclude the degree.

#### **Delete a Degree**

Select the **Remove Degree** button to delete the degree from the participating faculty detail. Remove Degree is not available if the **Source** of the degree is *Commons Profile*, meaning the degree is from the Commons Personal Profile of the person.

#### **Research Support**

This section, under Participating Faculty, details the sources of support for the participating faculty member who is currently being edited.

1. Click the **Expand** button to view the panel.

NIH and Othe	er Agency Sour	es of Support on I	Record			
Filter Table		1 Results			<b>≵</b> ⊞	< 1 of 1 ~ >
Grant 🔺		Role on Project or Subproject \$	Project Title ≑		Project Period 🗘	Current Year Direct Costs ≑
Other Source	7-01	Project Lead	Subproject : adsf			\$500,000
<b>Other Source</b> Filter Table		Project Lead 1 Results Project	Subproject : adsf			
	s of Support	1 Results	Project	Project Title 🗢	+ Add Project Lea	ad Source of Support
Other Source Filter Table Funding	s of Support Support	1 Results Project Number	Project Role 💠	Project Title 🗢 A Bi-directional Neural Interface for Bionic Prosthetic Legs	+ Add Project Lea	ad Source of Support

#### NIH and Other Agency Sources of Support on Record

Use this section to report currently-funded, active NIH or other Agency grants on which this faculty member is working. This list might be automatically populated with records if the faculty member is on record as being funded from NIH and other grants.gov systems. Records that are automatically populated lack an Edit or Remove button and thus are read-only.

Use the **Add Project Lead Source of Support** button to search for other NIH or Agency grants that contain sources of support. If the faculty member is reported on an RPPR, then those grants will be displayed as suggested sources of funding, but you can also find and choose grants outside of that suggested list. Grants not currently funded cannot be added.

To add another source of funding for the current faculty member:

- Under NIH and Other Agency Sources of Support on Record, click the Add Project Lead Source of Support button.
- 2. In the Add Source of Support search window, enter criteria to find grants in which the current participating faculty member is funded. Note that this window might contain a list of suggested grants to choose from before you perform your search. If the faculty member is reported on an RPPR (Research Performance Progress Report) for a component, then those grants will be displayed as suggested sources of funding. You can select suggested sources of funding, or you can find and choose grants outside of that suggested list.
- Enter search criteria in the Add Source of Support window and click the Search button.
- 4. In the search results, click the **Example Control Select the Funding Source** button for one or more grants that include funding for the current participating faculty member.

5. For the selected grant, enter details for the funding source, specifically the subproject the faculty member is working on, and the funding for that subproject.

Add Source of Support				×
Enter Source of Support Details * Required Field Funding Source:				
P50ES123456-07 Role during funding: *				
Project Lead				
Subproject Title *				
Project Start Date: 12/2017				
<b>Project End Date:</b> 11/2027				
Current Year Direct Costs: *				
	Cancel	← Back	Save and Add Another Source of Support Save and	Exit

- Click Save and Add Another Source of Support to find more sources of support, or click Save and Exit if finished with NIH sources of support for this faculty member.
- 7. To edit the source of support, click the hyperlinked grant number.
- 8. To delete the source of support, click the Remove Non-NIH Source of Support button.

#### **Other Sources of Support**

Includes Funding Source, Support Type, Project Number, Project Role, Project Title, Project Period, and Current Year Direct Costs.

To add additional support:

 Select the Add Another Source of Support button to display fields for searching/editing to add a non-NIH funding source.

- 2. Search for a funding source:
  - a. Search for support entering the parameters given and selecting Search
     Funding Sources button.
  - b. In the search results, click the **Example 1** Select the Funding Source button for the correct project.
- 3. Enter Start of Funding and End of Funding in mm/yyyy format.
- 4. Enter current year direct costs.
- Click Save and Add Another Source of Support to find more sources of support, or click Save and Exit if finished with NIH sources of support for this faculty member.
- 6. To edit the source of support, click the hyperlinked grant number.
- 7. To delete the source of support, click the **Remove Non-NIH Source of Support** button.

## **Mentoring Record**

Click the D **Expand** button to view the panel.

✓ Mentoring Record		
Pre-docs in Training	3	
Pre-docs Graduated	12	
Pre-docs Continued in Research or Related Careers	12	
Post-docs in Training	5	
Post-docs Completed Training	7	
Post-docs Continued in Research or Related Careers	7	
		🖬 Edit

The **Mentoring Record** panel of the *Participating Faculty Detail* to display counts of trainees mentored.

- Pre-docs In Training
- Pre-docs Graduated
- Pre-docs Continued in Research or Related Careers
- Post-docs in Training

- Post-docs Completed Training
- Post-docs Continued in Research or Related Careers

Use the **Edit** button to open the fields in a pop-up for editing. Save your changes by selecting the **Save** button on the pop-up.

# **Participating Students (New Application)**

This section displays the students added to the RTD - or a message indicating that none have been added, when appropriate. From this screen, you can add, edit, and remove students.

Prepare Research Training Dataset (RTD) for New Application									
<b>New RTD</b> 12498 - Exploring the Effec Nearby Inhabitants	ts of Long-Terr	n Radiation Exposure in	PD/PI Curie, Marie		Institution UNIVERSITY OF PARIS				
Participating Student	ts 🕜								
Filter Table	2 Results				★ ■ < 1 of 1 × >				
Person Name		Commons User ID 🌲		Person ID ≑	Student Type 🌻				
Curie, Marie	Î	MARIECURIE		140133387	Post-doc				
Curie, Pierre	Î	PIERRECURIE		140133388	Post-doc				
					Upload Participating Students + Add Student				

Figure 26: Participating Students

Students(s) are listed in a table at the bottom of the screen along with the following information:

- Person Name
- Commons User ID (if available)
- Person ID
- **Student Type**: Pre-doc or Post-doc for non T34 awards, or Undergraduate for T34 awards
- Click the hyperlinked student name to open the *Student Detail* for the selected student. Refer to the topic titled Refer to *Student Detail (New Application)* on page 58.
- Click the **Remove Student** button to remove the student from the RTD.

The **Add Student** feature allows you to search for and add students or create new xTRACT persons to add to the RTD.

## Add Individual Student to a Non-T34

To add a student:

- 1. Select the **Add Student** button.
- 2. Enter search parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can look outside of your institution by removing the checkmark for **Search for persons who have a Commons affiliation with my institution**.

All matching records display in the **Person(s)** table.

Search Res Persons	ults				
Filter Tabl	le	4 Results		₹ 🔳 <	1 of 1 🗸 🕨
Add to RTD 🔺	Person Name	Commons User ID 🖨	Person ID \$	Commons Institution 🗘	Email 🌲
Add ∨	Robi, I. D	ROBERT O	8291326	University Of Miss	eRATest@m ail.nih.gov
Add Stuc	toral	BANKS	11063437	University Of Miss	eRATest@m ail.nih.gov
Post-Doc Add V		MARKL	79824859	University Of Miss	eRATest@m ail.nih.gov
Add 🗸	Green, Jon	GREEN	6369037	University Of Miss	eRATest@m ail.nih.gov
1 Looki	ing for a Person bu	t don't see that pers	on listed? You	i can <u>create a new xTRACT per</u>	son record here.

*Figure 27: Adding Students for a Non-T34 award (Pre-Doctoral and Post-Doctoral students)* 

 For all the students you want to add, first select Pre-Doctoral or Post-Doctoral from the Add to RTD dropdown in the first column. Then click the Add Person(s) button. (Only those students that you selected Pre-Doctoral or Post-Doctoral will be added.)

**NOTE:** If you are unable to find the person you wish to add by doing a search, you may use the **Create a new xTRACT Person record here** link to create an xTRACT person record. Refer to the topic titled Refer to *Create xTRACT Person* on page 264

Repeat the search if necessary to add other students. Added students display the icon in the **Add to RTD** column.

# Add Individual Student to a T34

To add a student:

- 1. Select the **Add Student** button.
- 2. Enter search parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can look outside of your institution by removing the checkmark for **Search for persons who have a Commons affiliation with my institution**.

All matching records display in the **Person(s)** table.

earch Res Persons					
Filter Tab	4 R	esults		🛓 🖪 📢 1 d	of 1 🗸 🔪
Add to RTD 🔺	Person Name 🗘	Commons User ID 🌲	Person ID \$	Commons Institution 🗘	Email 🜲
<b>v</b>	Mark, Joh	MARK	79824859	University Of Miss	eRATest@m ail.nih.gov
<b>~</b>	Green, Jon	GREE	6369037	University Of Miss	eRATest@m ail.nih.gov
•	Rob, J. D	ROBE	8291326	University Of Miss	eRATest@m ail.nih.gov
•	Banks, Jo	BANK	11063437	University Of Miss	eRATest@m ail.nih.gov
	king for a Person but do	n't see that pers	on listed? You	can <b>create a new xTRACT</b>	person
reco	ord here.				

*Figure 28: Adding Students for a T34 award (Students are added as undergraduates by default)* 

3. Mark the checkboxes of the student to add and click the **Add Person(s)** button. The students are added as student type "Undergraduate" by default because T34 grants are for undergraduates only.

Repeat the search if necessary to add other students. Added students display the **Solution** in the **Add to RTD** column.

## To add multiple students via Bulk Upload:

- 1. Select the **Upload Participating Trainees** link.
- 2. The Upload Participating Trainees screen will open.
  - a. A link to download a tab-separated (TSV) text template file is displayed.
  - b. Important Notes When Uploading Participating Trainee Data:
    - The tab-delimited template format includes the following required columns: Commons User ID, Student Type, In-Training Indicator, Start Date, End Date, Research Topic, Faculty Commons User ID 1, Faculty Commons User ID 2.
    - The Commons User ID, Trainee Type, and In-Training Indicator are required for each uploaded participating trainee. The other columns may be left blank, as appropriate.
    - 3. If the same Commons ID is provided for multiple entries in the upload file, an error will be reported.
    - The trainee Type must be one of the following (without quotations): "POST-DOC", for Post-Doc, "PRE-DOC" for Pre-Doc, and "SHORT-TERM" for Short-Term.
    - 5. The In-Training Indicator must be one of the following (without quotes): "Y" for Yes or "N" for No.
    - 6. Valid date format for Start and End Dates is MM/YYYY.
    - 7. If it is provided, the Research Topic must be 200 Characters or less.
    - 8. Up to two faculty members may be provided for each trainee, and each must be identified by a valid Commons ID.
    - 9. Each trainee provided in the upload file will be used either (a) to add that person to the RTD's participating trainee list, or (b) to update information for the person (if already listed on the RTD as a participating trainee).
    - 10. If uploading date to update an existing participating trainee, all information on the input record will be used to replace data that is currently

stored, with the exception of the trainee type which cannot be altered. For faculty member, this means that any faculty who may currently appear for the indicated trainee in xTRACT will be removed, and then replaced by the faculty who are listed for that trainee in the upload file.

- 11. The data will be validated upon upload of the file and the results will be presented on the screen.
- 12. If the upload fails for any reason (such as incorrect data or incorrect format), none of the records will be saved in xTRACT. Data will only be saved if all rows in the upload file pass validation.
- c. A **browse** link allows you to select an existing, correctly formatted file.
- 3. When **Browse** is used to select an existing file, the system will perform a validation to ensure that the file conforms to the correct format and that the data satisfies the conditions described in the guidelines.
  - A pop-up message will display if the format is not valid and that file will not be uploaded. Any data validation errors must be corrected before any changes are accepted and applied.
  - If there are no validation errors, the data will be applied and a success message will appear.

# **Edit Student**

Click the hyperlinked faculty member name to edit the participating faculty details for the selected member. Refer to the topic titled Refer to *Student Detail (New Application)* on page 58.

## Remove

Select the **Remove Student** button to remove the student from the RTD. At the confirmation, select **Delete**.

# **Student Detail (New Application)**

Use the **Expand** button next to each section of the *Participating Student Detail* to display it. The **Open All Sections** link reveals all collapsed sections at once.

Hom	ie Admin	Institution Profile	Personal Profile	Status	ASSIST	Prior Approval	RPPR	xTrain	XTRACT	Admin Supp	eRA Partners	Non-Research
xTR/	CT Info N	ew Applications	Training Grants	Persons	Institutio	n Data						
1	raining Gra	nts	Prepare Res	earch Tra	ining Dat	aset (RTD) for F	Revision					
			RTD		4T3	2HL123456-10	Dynami	c Effect	s of Waki	ing Sleeping I	Dogs	
F	RTD -		PD/PI		McI	Vanus, Patrick						
E	Basic Inform	ation	Participating	Trainee I	Detail 👔	)						
	Participating Departments	s / Programs	Quagmire, Fe	Quagmire, Fenton (Pre-doc)								[+ Open All Sections ]
	raining Sup Summary	port &	O Student Data									
		E	O In Training Data									
	Participating	Faculty	Faculty Members									
F	Participating	Trainees										
F	Program Sta	tistics	Support L	Support During Training								
A	pplicants ar	nd Entrants	O Degrees									
A	ppointment	s	O Post-Trair	ning Posit	ions							
F	Preview PDF		O Subseque	ent Grants								
			• Publicatio	ins								

Figure 29: Participating Student Details

Each section provides a means for viewing or editing the information. Refer to the steps below.

**NOTE:** The screen varies between T34 (undergraduate training grant) and other types of training grants. T34s have only undergraduates, so field labels reflect undergraduates instead of doctoral trainees if you are working on a T34.

## **Student Data**

Use the **Expand** button next to each section of the *Participating Student Detail* to display it. The **Open All Sections** link reveals all collapsed sections at once.

Но	ome Admin Institution Profile	e Personal Profile	Status	ASSIST	Prior Approval	RPPR	xTrain	XTRACT	Admin Supp	eRA Partners	Non-Research
хΤ	RACT Info New Applications	Training Grants	Persons	Institutio	n Data						
	Training Grants	Prepare Res	earch Tra	ining Dat	aset (RTD) for f	Revision					
1		RTD		4T3	2HL123456-10	Dynami	c Effect	s of Waki	ing Sleeping [	Dogs	
	RTD+	PD/PI		McI	Vanus, Patrick						
	Basic Information	Participating	Trainee I	Detail 👔	)						
	Participating Departments / Programs	Quagmire, Fe	enton (Pr	re-doc)							[+ Open All Sections ]
	Training Support & O Student Data										
	Summary	O In Training	g Data								
	Participating Faculty	• Faculty N	lembers								
	Participating Trainees										
	Program Statistics	Support E	Juring Trai	ning							
	Applicants and Entrants	C Degrees									
	Appointments	O Post-Train	ning Positi	ions							
	Preview PDF	O Subseque	ent Grants								
		Publicatio	ins								

Prepare Research Training Dataset (RTD) for Revision				
RTD 5T32ES123456-25 Long Exposure on Nearby Inha	-Term Effects of Radium abitants	PD/PI Curie, Marie (Contact)		
Participating Stud	ent Details 😯			
Curie, Pierre Post-	Doc			
Commons User ID PIERRECURIE	<b>Email</b> eratest@nih.gov	In Training?	Start Date into Postdoctoral Research () None	End Date <b>()</b> None
Research Topic None				<b>∠</b> Edit
				Open All Sections
> Faculty Members				
> Degrees				
> Post-Training Posit	ions			
> Subsequent Grants	;			
> Publications				1

Figure 30: Participating Student Details

Each section provides a means for viewing or editing the information. Refer to the steps below.

#### **Participating Student Details**

The **Participating Student Details** panel displays the following read-only information:

- Commons User ID or Person ID
- Email
- In Training?
- Start Date
- End Date
- Research Topic

Use the **Edit** button to open the fields in a pop-up for editing.

- In Training
- Type
- Research Topic
- Start Date
  - Into Current Degree-Granting Program, for a Predoctoral trainee
  - Into Postdoctoral Research, for Postdoctoral trainee
- End Date (when Trainee Left Program)

#### **Faculty Members**

1. Click the **Expand** button for the Faculty Members panel to display the faculty members for the student on the RTD.

✓ Faculty Members					
<b>.</b>		<b>*</b> +			
Curie, Marie	Ť	Add Faculty			

2. To add faculty, select the **Add Faculty** button.

**NOTE:** Up to two faculty members may be associated with a student. If there already two faculty members already listed, then the **Add Faculty Member** button does not display. To change a faculty member, delete the appropriate one first and then add the new one.

3. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons** who have a Commons affiliation with my institution.

**NOTE:** You must enter a Commons ID, Person ID, or Last Name to perform a search.

4. Select the **Search Persons** button.

Search for Faculty			×
Search Criteria			
Either Commons User ID or Person ID o     Commons User ID	or Last Name is required to perform person search. * Person ID		
First Name 2	Middle Name	* Last Name Shorts%	
Search for persons who have a Comm	mons affiliation with my institution mmons ID or Last Name, by using the "%" character.		
For example: abcd% or %abcd% or ab%cd			
Search Persons Clear			
3	J		Close

Figure 31: Search Faculty Member

- 5. All matching records display in the **Person(s)** table. Select the **Add to RTD** check box to add the person to the list of faculty for this student.
- 6. Click the **Add Person(s)** button. The faculty member is added to the student details.
- 7. Search for and add other faculty as necessary, repeating the steps above.

**TIP:** Once two faculty members are added, the ability to add more is disabled.

8. To remove a faculty member from the Student, select the **Remove Faculty Member** button for the faculty member.

## Degrees

1. Click the **Expand** button for the Degrees panel to display a list of completed degrees and associated data.

Filter Table     1 Results					
Degree <sup>▲</sup>	Institution ≑	Date Degree Received ≑	Status ≑	Received in Training 🗘	Source ≑
	University Of Paris Faculty Of Medicine	05/2015	Completed		xTRACT

The **Source** of degrees is displayed as *xTRACT* (meaning that the degree was added or edited to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

#### To add a degree:

- 1. Select the **Add Degree** button.
- 2. Update the fields in the *Create a New Degree* pop-up:
  - Degree: Select from the list
  - **Other Degree Text**: Enter if Degree selected is *OTH (other type of degree)* or another category like BOTH, DDOT, DOTH, MDOT, MOTH, and VDOT.
  - Degree Date: Enter in MM/YYYY format
  - **Terminal Degree**: Select the **Yes** or **No**. When **Yes** is selected, the terminal degree indicator (This is the terminal degree of this person.) displays next to the degree details in the view. Only one degree per person can be set as the Terminal Degree.
  - Degree Status: Select Completed or In Progress, as appropriate
  - **Received in Training**: Select Yes or No. Up to three degrees can be selected as Received in Training.

- **Degree Institution**: Enter the institution name, one institution per degree. Start typing in part of the institution's name and a drop-down menu displays with related institution names. Select the institution name from that menu. If the desired institution name does not appear, a link is provided at the bottom of the drop-down menu that will accept the name of the institution as typed in.
- 3. Select the **Save** button to save the new degree.
- 4. Repeat for any additional degrees.
- 5. To edit a degree, click the hyperlinked degree name.
- 6. To delete a degree, click the **ERemove Degree** button for the degree. Degrees with *Commons Profile* as a **Source** cannot be deleted.

## **Post-Training Positions**

1. Click the **Expand** button for the Post-Training Positions panel to display post-training position information.

Filter Table	1 Results			<b>*</b> E	<b>B</b> < 1 of 1 ~ >
Position (Type) 🔺	Institution 🗢	Department 🗘	Start Date - End Date  ≑	Principal Activity 🗘	Source ≑
Principal Research Scientist <b>T</b> Primary Current Position	University Of Paris Faculty Of Medicine		05/2015 -	Primarily Research	xTRACT

The **Source** of positions is displayed as *xTRACT* (meaning the position was added or updated for the person in xTRACT) or as *Commons Profile* (meaning the position is from the Commons Personal Profile of the person).

#### To add a position:

- 1. Click the **Add Position** button.
- 2. Provide the following information:
  - **Workforce Sector**: Choose the area of employment: Academia, Government, For-Profit, Nonprofit, Other.
  - **Principal Activity**: Primarily Research, Primarily Teaching, Primarily Clinical, Research-Related, Further Training, or Unrelated to Research.
  - **Position**: Type the title of the position.
  - **Start Date**: Type the month/year the position started.
  - **End Date**: Type the month/year the position ended, or leave blank if employed to present time.
  - **Primary Employment Indicator**: Select **Yes** if this is the main employment; otherwise, select **No**.
  - Full Time Employment Indicator: Select Full-Time or Part-Time
  - **Current/Initial Employment Indicator**: Select **Primary Initial** if this is the initial employment for the trainee, or select **Primary Current** if it is the current employment.
  - **Institution**: Enter the institution or start typing to see matches to your typed text.
  - **Primary Department of Position**: Enter the department or start typing to see matches to your typed text. Matches for the selected Institution are shown.
- 3. Select the **Save** button to save the changes.
- 4. Repeat to add additional positions.
- 5. To edit a position, click the hyperlinked position name.
- 6. To delete a position, click the **Delete this employment** button for the position. Positions with *Commons Profile* as a **Source** cannot be deleted.

## **Subsequent Grants**

1. Click the **Expand** button for the Subsequent Grants panel to display subsequent fellowship, career development, or research grant support obtained from any source after the individual completed training.

<ol> <li>You may inc</li> </ol>	lude up to	o 5 sources	of support in RTD.	Subsequent support can only be reported	for PD/PI, Staff	Scientist, Faculty or Co-I	Investigator ro	les.
Filter Table		2 Result	5			* E	<b>H (</b> 10	of 1 🗸 💠
Гуре of Support 📍	Source Suppo		Project Number ≑	Project Title ≑	Project Role ≑	Year of Support ≑	Source ≑	Include i RTD
Research 👘 Grant	NIH		R01ES123456	Long-Term Effects of Radium Exposure on Nearby Inhabitants	Co- Investigator	06/2015 to 05/2025	XTRACT	
Research 👕	Nationa Founda	al Science	IIS-1234567	X-Ray Crystallography and the Molecular Structure of DNA	Co- Investigator	05/2020 to 04/2025	XTRACT	

Sources of support submitted on the RTD should list the trainee/student in a role such as PD/PI, co-investigator, faculty collaborator, or staff scientist.

**NOTE:** xTRACT prepopulates NIH subsequent grant support from xTrain trainee data when available. You cannot delete prepopulated support records from the Subsequent Grants table.

Under *NIH and Other Agency Sources of Support on Record*, indicate up to five subsequent sources of support to include in the RTD. Each button lets you add a different type of support:

**Add Source of Support** button: Add grant support received from NIH and other Agency sources that are on record. If you do not know the specific grant, you can indicate support by entering only the activity code and IC.

**Add Other Source of Support** button: Add sources of grant support received from non-NIH/Agency sources.

- 2. To edit a source of support, click the hyperlinked grant name to edit it.
- 3. To delete a source of support, click the **Remove Source of Support** button.
- 4. Mark up to five **Include in RTD** checkboxes to specify which sources of support will be included in the RTD, which allows only five sources. Once you mark five checkboxes, you cannot mark a sixth.

Sources of support that you include on the RTD must list the trainee/student in a project role such as PD/PI, co-investigator, faculty collaborator, or staff scientist. If you mark the checkbox of a record with a non-supported project role, an error will occur when you mark the checkbox, which states: "*Subsequent support may only be reported if the indi-vidual had the following role: PD/PI, Staff Scientist, Faculty, or Co-Investigator.*"

To add an NIH or Agency grant as a support source:

1. In the *Subsequent Grants* pane, click the **Add Source of Support** button. The *Add Source of Support* popup appears.

Add Source of Support					
Search for and s Search Criteria * Required Field	select a Funding Sou	rce			
Activity Code *	IC Code *	Serial Number	Suffix Code		
Start Date	End Date	PD/PI Last Name			
Institution					
Select One			~		
			Cancel <b>Q</b> Search Funding Sources		

- 2. Enter search criteria to search for existing NIH/Agency grants that provided funding. Red asterisks denote required fields.
- 3. Click the **Search Funding Sources** button.
- 4. In the search results, click the **Eselect this funding source** button for the funding source you want to add.
- 5. The popup then displays the Step 2: Enter Source of Support Details section. In this popup, choose the role and enter Start of Funding and End of Funding in mm/yyyy format to indicate the dates of the individual's involvement.

dd Source of Support				
Progress: 50%				
Step 2: Enter Source of Support Details				
Funding Source: Epigenomics of Patient Outcomes after Aneurysmal SAH Role during funding:		Other role description:		
Trainee	•	other role description.		
Start of Funding (mm/yyyy):				
10/2016				
End of Funding (mm/yyyy):				
09/2017				
			Save	Cance

 Click the Save and Exit button. Alternatively, if you want to add another funding source, click the Save and Add Another Source of Support button to be returned to the funding search popup.

#### To add support from non-NIH/Agency sources of support:

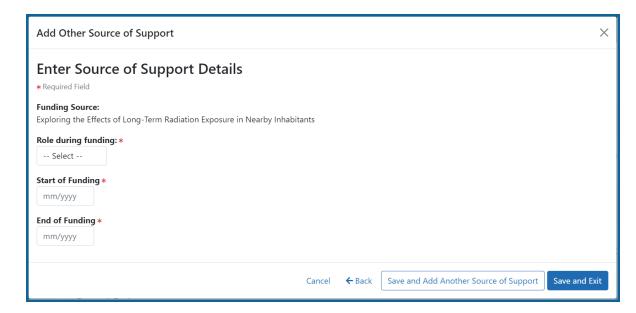
1. In the *Subsequent Grants* pane, click the **Add Other Source of Support** button to open the *Add Other Source of Support* popup.

Add Other Source of Support					
Search for and select a Funding Sour Search Criteria Type of Funding Source	YCE Source of Support				
Fellowship Other Research Assistantship	Foundation (Fdn) National Science Foundation (NSF) Non-US (Non-US)				
Funding Source Number	Project Title				
Ex: ABC-D1234	Ex: metabolic changes and				
Start Date (mm/yyyy or yyyy)	End Date (mm/yyyy or yyyy)				
	Cancel <b>Q</b> Search Funding Sour	rces			

- 5. Search for support by entering search criteria.
- 6. Click the **Search Funding Sources** button.
- 7. In the search results, click the **ESelect this funding source** button for the funding source you want to add.
- 8. If the funding source you are looking for does not appear, click the link to **create a new funding source here**.

Add Other Source of Support	×
Search for and select a Funding Source *Required field(s)	
Type of Funding Source *	Source of Support *
Select One	Select One
Project Title *	Funding Source Number
Start Date (mm/yyyy or yyyy)	End Date (mm/yyyy or yyyy)
mm/yyyy or yyyy	mm/yyyy or yyyy
Description	
	<i>K</i>
	Cancel  ← Back  → Create Funding Source

- a. Manually enter the funding source that you would like to cite. Provide information about the funding source you are creating. Red asterisk fields are required.
- b. When finished, click the **Create Funding Source** button.



- c. Select an option from the **Role during funding** dropdown.
- d. Enter Start of Funding and End of Funding in mm/yyyy format.
- e. Click the Save and Exit button.

#### **Publications**

Click the **Expand** button for the Publications panel to display peer-reviewed publications and manuscripts accepted for publication in peer-reviewed journals.

✓ Publications				
• Note: For any past participant who exit	ted the program more than 10 years	ago, that person's publ	lication information will not appear in table 5 of the RTD.	
You cannot add a publication if its supervising Faculty member is not listed. <b>Existing Faculty Added to the RTD:</b> • Curie, Marie • Sklodowska, Salomea • Curie, Plerre If the supervising Faculty member is not listed, <u>add the Faculty Member</u> first, then add a publication.				
······				
There are no publications for this stude	nt.			
			+ Add Publication Manually + Add PubMed Publication	
Filter Table	sults		★ ■ < 1 of 1 × >	
Authors <sup>•</sup>	Title ≑	PMID \$	Faculty Member ≑	
Curie, M, Sklodowska, S, and Curie, P	Long-Term Effects of Radium . Exposure on Nearby Inhabitants	27804982	Curie, Marie	

For students/trainees, list all publications resulting from their period of training in the participating faculty member's laboratory or in association with the current training program, through completion of their degree. Do not list publications resulting from work done prior to entering the training program or arising from research initiated after the completion of the program.

#### To indicate the trainee/student has no publications:

In the Publications section, click the checkbox titled *Check this box if there are no publications for this trainee*. **NOTE:** This button does not appear until you add faculty to the RTD using the Participating Faculty section.

The No Publications popup appears.

- 2. Select the Faculty Member and Reason for No Publications, and click Save.
- If you change your mind and want to add a publication, clear the checkbox and the Add Publication button reappears.

#### To add a publication by searching PubMed/PubMed Central:

1. In the Publications section, click the **Add Publication** button.

**NOTE:** This button does not appear until you add faculty to the RTD using the Participating Faculty section.

The *Add Publication* popup appears, where you search for the publications to add or manually enter an article citation.

Add PubMed Publication for Curie, Pierre					
Search Publication on PubMed					
PubMed ID/PubMed Central ID					
e.g. 123456789,PMC1234567					
Enter one or more IDs, separated by commas.					
Author First Name	Author Last Name	Title			
e.g. Jane	e.g. Doe	Enter a keyword			
		Cancel Q Search PubMed			

- 2. Enter search criteria using one of the methods below.
  - a. Pub Med ID/PubMed Central ID: Enter IDs for articles listed in PubMed or PubMed Central. To search for multiple articles at once, enter a comma separated list of IDs, which can be from either PubMed or PubMed Central. Precede PubMed Central IDs with "PMC" as shown below.

Examples:

- Enter **PMC7679077** to search for a PubMed Central article (PMCID)
- Enter **32226987** to search for a PubMed article (PMID)
- Enter PMC7679077, 32226987 to search for both articles at once
- b. **First Name.** Enter all or a portion of the first name; articles with the text you enter here are found.
- c. Last Name. Enter the *exact last name*; only exact matching last names are found.
- d. **Title.**For publication title, enter one or more keywords; only those publications whose titles that contain all keywords are found.

- 3. Click the **Search** button. The Publication Search Results appear, where you can add any number of publications by marking their checkboxes.
- 4. To add a publication from search results:
  - 1. Select its Include in RTD checkbox
  - 2. Choose from the **Faculty Member** dropdown. The faculty members listed are those in the Participating Faculty section of this RTD in XTRACT.
  - 3. Choose the current trainee/student that you are editing from the **Author** dropdown. The list of authors is pulled from PubMed/PubMed Central.
  - 4. Click the **Save** button.

If you indicate a **Faculty Member**, an **Author**, or mark the checkbox of a publication, but omit the rest of the fields, then you will receive the warning on saving: *No publications were selected to report on the RTD*. This means that the publication won't be added due to insufficient information for the publication. Before saving, be sure to fill out all required fields for a publication record that you want to add.

#### To add a publication by manually citing it:

Instead of searching for PubMed/PubMed Central publications, you can manually enter all the necessary information to create a citation.

- In the Publications section, click the Add Publication Manually button.
   NOTE: This button does not appear until you add faculty to the RTD using the Participating Faculty section.
- 2. The *Manually Add Publication* popup appears.
- a. The information needed to define a citation is shown on the screen -- Title, Journal, Faculty Member, Volume, Inclusive Pages, Year, and Authors. Enter information for all fields that apply, being sure to enter information for the required fields that have a red asterisk.
  - b. You can enter multiple authors to compile a list of all authors of the publication. To add an author, enter the author's name in the **Authors** text box and click the **Add Author** button:

Repeat to add more authors. As authors are entered, the list of authors is displayed as shown below. Use the controls to re-order the list.

Select the student's name and click the **Highlight This Student** button.

- c. When finished entering the citation information, click the **Review** button, which gives you the opportunity to review the citation you entered.
- 4. Click the **Add** button to add the manual citation.

The publications you added appear in a table in the Publications section.

Click the **end** three-dot ellipsis button and select **Edit Publication** or **Delete Publication** to update or remove a publication.

# **Applicants and Entrants (New Application)**

**NOTE:** T34 Undergraduate Training Grants lack the *Applicants and Entrants* section of the RTD.

To enter Pre-doc and Post-doc applicants and entrants, first enter the start year of the most recently completed academic year and click the **Submit** button.

Select the **Edit Pre-Doc Applicants and Entrants** and **Edit Post-Doc Applicants and Entrants** buttons to display and enter data for the specific academic year(s).

Prepare Research Training Dataset (RTD) for New Application					
<b>New RTD</b> 12498 - Exploring the Effects of Long-Term Radiation Exposure in Nearby Inhabitants	<b>PD/PI</b> Robinson, Donita L	Institution UNIV OF NORTH CAROLINA CHAPEL HILL			
Applicants and Entrants 💡					
Applicants and Entrants         Start year of the most recently completed academic year *         2023         Submit         The Pre-doc and Post-doc data may be edited via the links below, once the Start of the most recently completed academic year has been provided.         Edit Pre-Doc Applicants and Entrants         Edit Post-Doc Applicants and Entrants					

## Figure 32: Applicants and Entrants

To change the most recently-completed academic year, change the year entered and select **Submit**. When changing **Academic** years, any data entered for **Applicant and Entrant Counts and Characteristics** are retained and associated with the shifted year based on order of years (rather than previously specified year).

For example, assume the first academic year is 2000-2001 and there is applicant/entrant data entered for that year. If the first academic year is changed to 2001-2002 by changing the most recently-completed academic year from 2001 to 2002, the same applicant/entrant data display for that first year.

# Predoctoral Applicant and Entrant Counts and Characteristics (New Application)

## **Edit the Counts and Characteristics**

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save** buttons to save it or select **Cancel** to exit editing without saving the changes.

Within this section, you will find a separate tab for each of the five most recent academic years. You may change the academic year that you are entering at any time by simply selecting the appropriate tab. By default, you will be positioned at the most recent academic year when this screen is first displayed.

**NOTE:** T34 Undergraduate Training Grants lack the *Applicants and Entrants* section of the RTD.

Prepare Research Training Dataset (RTD) for New Application				
<b>New RTD</b> 12498 - Exploi Nearby Inhabi	PD/PI ing the Effects of Long-Term Radiation Exposure in Curie, Marie ants	Institution UNIVERSITY OF PARIS		
2023 - 2024	2022 - 2023 2021 - 2022 2020 - 2021 2019 - 2020 Summary			
Predoctoral Applicant and Entrant Counts and Characteristics 😧				
> Counts:	Department or Program		Open All Sections	

Figure 33: Predoctoral Applicant and Entrant Counts and Characteristics

## **Counts table**

For Predoctoral Applicants and Entrants, Counts are entered by Participating Departments or Programs. If a Department or Program is missing, refer to the topic titled Refer to *Participating Departments and Programs (New Application)* on page 23. The following fields are provided for data entry on each department or program:

- Department or Program (read only)
- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

## **Summary of Counts and Characteristics**

Select the **Summary** tab to display a summary for predoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.



This section is read-only and is computed based on the information that has been entered across academic years.

# Postdoctoral Applicant and Entrant Counts and Characteristics (New Application)

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

**NOTE:** T34 Undergraduate Training Grants lack the *Applicants and Entrants* section of the RTD.

Prepare Research Training Dataset (RTD) for New Application				
New RTD         PD/PI           12498 - Exploring the Effects of Long-Term Radiation Exposure in         Curie, Marie           Nearby Inhabitants         Curie, Marie	Institution UNIVERSITY OF PARIS			
2023 - 2024 2022 - 2023 2021 - 2022 2020 - 2021 2019 - 2020 Summary				
Postdoctoral Applicant and Entrant Counts and Characteristics 😯				
Open All Section Counts: Degree Types				

*Figure 34: Postdoctoral Applicant and Entrants Counts and Characteristics* 

# **Counts table**

For PhDs, MDs, dual-degree holders, and other degree holders, update the following information:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

## **Summary of Counts and Characteristics**

Select the **Summary** tab to display a summary for postdoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.



This section is read-only and computed based on the information that has been entered across academic years.

# **Preview PDF (New Application)**

Select the **Preview PDF** link in the RTD pane on the left side of the screen to open save, and/or print the training tables. An *In Progress* watermark will be printed on the *Training Table* PDF until the RTD is finalized.

A copy of the RTD is downloaded to the browser's default location.

## **Finalize RTD (New Application)**

Certain users have the ability to finalize the RTD for a training grant. Finalized RTDs are marked as *Final* and cannot be edited.

To finalize an RTD:

1. Select the **Finalize RTD** link from the **RTD** links on the left side of the screen.

A confirmation message warns: Are you sure you want to finalized this RTD? Once finalized, the RTD cannot be edited?

**IMPORTANT:** Once you finalize, the RTD cannot be edited. Select the **No** button if you do not wish to finalize.

2. Select the **Yes** button to finalize the RTD. A confirmation screen is displayed when the RTD has successfully finalized.

xTRACT generates a PDF version of the training tables without the *In Progress* watermark, updates the status of the RTD to *Final*, and locks the RTD for editing.

You will have the option to view the finalized PDF at any time on the *Search New RTDs* screen and unfinalize the RTD if needed.

New Applications	Search Research Training Data Sets for N	ew Applications 🕑
Search RTD for New Applications	New Data Set Identifier	New Data Set Project Title
Initiate RTD for New Application		abca% or %abca% or ab%ca% Use %' as a wildcard character.
	PD/PI Last Name	
	abcd% or %abcd% or ab%cd%	
	Use '%' as a wildcard character.	
	Clear Search Criteria Search New RTDs	
	RTDs of New Applications	
	Filter Table 4 Results	▲ I of 1 ~ >
	RTD ID A Status 🗘 Project Title 🗘	PD/PI Name 🌩
	12498 D Cinalized Exploring the Effe	ts of Long-Term Radiation Exposure in Nearby Inhabitants Curle, Marie

Click the hyperlinked RTD ID to view the PDF.

Click the **Unfinalize New Application** button to edit the RTD.

# Prepare RTD for Research Performance Progress Report (RPPR)

To access the screen:

- 1. Search for the training grant on the *Search for Training Grants* screen. Refer to the topic titled Refer to *Search for Training Grants* on page 14 for steps.
- 2. Click the 📴 three-dot ellipsis button and select the appropriate link to access the

Prepare Research Training Dataset (RTD) for Research Performance Progress Report (RPPR) screen:

- To initiate the RTD for the progress report: Select the **Prepare for RPPR** link.
- To continue working on an initiated RTD: Select the **Continue for RPPR** link.

**NOTE:** A pop-up message may appear if RPPR RTD information exists for current or prior years. The copy options provided are conditional on the year and type of grant for which the RPPR RTD is being prepared. This feature allows the user to import and populate current or prior year RTDs or to continue one that has been started.

**IMPORTANT:** If the user selects the option to continue without copying data over, that copy option will no longer be available for the RTD being prepared.

The Prepare Research Training Dataset (RTD) for Research Performance Progress Report (RPPR) screen opens for the selected training grant. Use the links listed under **RTD** on the left side of the screen to maintain the specific sections of the RTD:

- Maintain participating trainees
- Maintain program statistics (if applicable to the training grant)
- Preview PDF
- Finalize the RTD

Selecting the links above opens the specific section of the RTD. From within, you can add, edit, and/or remove data.

# Participating Trainees (RPPR)

Displays the participating trainees added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove participating trainees.

TD 32ES123456-25 Long-Term Effe posure on Nearby Inhabitants	ects of Radium	PD/PI Curie, Marie (Cont	tact)		<b>eporting Period</b> 2009 - 03/31/2024	
articipating Trainees 😮						
Filter Table	53 Results				* 🖽	< 1 of 3 ~ >
erson Name 🔺	Com	nons User ID 💠	Person ID ≑	Trainee Type 🌲	Start Date ≑	End Date ≑
Jlam, Joseph	1 ULAN	IJOSEPH		Post-doc	2021-10-01	2023-09-01
Curie, Pierre	CUR	EPIERRE		Post-doc	2008-06-01	2010-06-01
sklodowska, Salomea	SKLC	DOWSKA, SALOMEA		Post-doc	2014-09-01	2016-09-01
repare Research Trainir	ng Dataset (R	TD) for Renewal	(	Copy Trainee Info ▼ Up	oload Participating Trai	Add Trainee
repare Research Trainin TD T32ES123456-25 Long-Term Eff xposure on Nearby Inhabitants		TD) for Renewal PD/PI Curie, Marie (Cor		Copy Trainee Info 🔻 Up	oload Participating Train	nees 🕂 Add Trainee
TD T32ES123456-25 Long-Term Eff	ects of Radium	PD/PI		Σορy Trainee Info ▼ Up	load Participating Trai	Add Trainee
TD T32ES123456-25 Long-Term Eff xposure on Nearby Inhabitants articipating Trainees ?	ects of Radium	PD/PI		Copy Trainee Info <b>v</b> Up	oload Participating Trai	Add Trainee
TD T32ES123456-25 Long-Term Eff xposure on Nearby Inhabitants articipating Trainees ?	ects of Radium	PD/PI		Copy Trainee Info <b>•</b> Up		
TD T32ES123456-25 Long-Term Eff xposure on Nearby Inhabitants articipating Trainees ?	iects of Radium	PD/PI Curie, Marie (Cor	ntact)			< 1 of 3 ~ >
TD T32ES123456-25 Long-Term Eff xposure on Nearby Inhabitants articipating Trainees ? Filter Table	iects of Radium	PD/PI Curie, Marie (Cor	ntact)	Trainee Type 🗢	Start Date \$	<1 of 3 v > End Date \$

*Figure 35: Participating Trainees* 

Participating trainee(s) are listed in a table at the bottom of the screen along with the following information:

- Person Name
- Commons User ID (if available)

- Person ID
- **Trainee Type**: Pre-doc; Post-doc; Short Term
- Start Date
- End Date
- The hyperlinked trainee name opens the *Participating Trainee Detail* for the selected trainee. Refer to the topic titled Refer to *Participating Trainee Detail (RPPR)* on page 84.
- The **Remove Trainee** button removes the person from the RTD.

The **Add Trainee** feature allows you to search for and add existing trainees or create new trainees to add to the progress report. Refer to the topic titled Refer to *Add Trainee* (*RPPR*) on page 81 for more information.

# Add Trainee (RPPR)

You can add a trainee to a progress report from the RTD screen. To access this screen, you must first perform a search for the grant.

Click the three-dot ellipsis button and select the **Prepare for RPPR** or **Continue for RPPR** link to open the *Prepare Research Training Dataset (RTD) for Research Performance Progress Report (RPPR)* screen.

### To add a trainee from a search:

- 1. Select the **Add Trainee** button.
- 2. Enter parameters and select the **Search Persons** button. By default, the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

3. All matching records display in the Person(s) table. Click the Add Trainee as drop-

down in the **Add to RTD** and select the appropriate option to add the person.

4. Click the **Add Person(s)** button to add them to the RTD.

### To add a trainee you are creating:

- 1. Perform a search as described above. You cannot create a new person record unless you first perform a search.
- 2. Select the **Create a new xTRACT person record here** button located under the Person(s) table. This button is only available after you have performed a search.

Create xTRACT Person as Participating Tra	ainee X
* Required Fields Add Trainee as *	
Select	
Prefix	Suffix
Select	Select
First Name *	Middle Name
Ex.: Jane	Ex.: Emily
Last Name *	Email Address
Ex.: Doe	Ex.: jane.doe@example.com
	Cancel Save

The Create xTRACT Person screen displays.

Figure 36: Create xTRACT Person Fields

- 3. Enter the person data in the designated fields.
  - Add Trainee as (required) Select an option from the list.
  - Prefix: Select an option from the list.
  - Suffix: Select an option from the list.
  - First Name (required)
  - Middle Name
  - Last Name (required)
  - Email Address

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4. Click the **Save** button to save the changes.

Use the displayed xTRACT Person Profile to provide details about the added person. For additional information, refer to the topic titled Refer to *xTRACT Person Profile* on page 257.

### To perform a bulk upload of trainees:

- 1. Select the Upload Participating Trainees link.
- 2. The Upload Participating Trainees screen will open.
  - a. A link to download a tab-separated (TSV) text template file is displayed.

### b. Important Notes When Uploading Participating Trainee Data:

- The tab-delimited template format includes the following required columns: Commons User ID, Student Type, In-Training Indicator, Start Date, End Date, Research Topic, Faculty Commons User ID 1, Faculty Commons User ID 2.
- 2. The Commons User ID, Trainee Type, and In-Training Indicator are required for each uploaded participating trainee. The other columns may be left blank, as appropriate.
- 3. If the same Commons ID is provided for multiple entries in the upload file, an error will be reported.
- The trainee Type must be one of the following (without quotations): "POST-DOC", for Post-Doc, "PRE-DOC" for Pre-Doc, and "SHORT-TERM" for Short-Term.
- 5. The In-Training Indicator must be one of the following (without quotes): "Y" for Yes or "N" for No.
- 6. Valid date format for Start and End Dates is MM/YYYY.
- 7. If it is provided, the Research Topic must be 200 Characters or less.
- 8. Up to two faculty members may be provided for each trainee, and each must be identified by a valid Commons ID.

- 9. Each trainee provided in the upload file will be used either (a) to add that person to the RTD's participating trainee list, or (b) to update information for the person (if already listed on the RTD as a participating trainee).
- 10. If uploading date to update an existing participating trainee, all information on the input record will be used to replace data that is currently stored, with the exception of the trainee type which cannot be altered. For faculty member, this means that any faculty who may currently appear for the indicated trainee in xTRACT will be removed, and then replaced by the faculty who are listed for that trainee in the upload file.
- 11. The data will be validated upon upload of the file and the results will be presented on the screen.
- 12. If the upload fails for any reason (such as incorrect data or incorrect format), none of the records will be saved in xTRACT. Data will only be saved if all rows in the upload file pass validation.
- c. A **browse** link allows you to select an existing, correctly formatted file.
- 3. When **Browse** is used to select an existing file, the system will perform a validation to ensure that the file conforms to the correct format and that the data satisfies the conditions described in the guidelines.
  - A pop-up message will display if the format is not valid and that file will not be uploaded. Any data validation errors must be corrected before any changes are accepted and applied.
  - If there are no validation errors, the data will be applied and a success message will appear.

# Participating Trainee Detail (RPPR)

While preparing an RTD for a progress report, you can open the Participating Trainee Detail for a trainee by clicking the trainee's hyperlinked name. The *Participating Trainee Detail* for the selected person is grouped into panels. Use the **Expand** button and **Edit** buttons and links to display and edit the information as detailed below.

Prepare Research Train	ing Dataset (RTD) for	Research Performance Prog	ress Report (RPPR)	
RTD 5T32ES123456-25 Long-Term E Exposure on Nearby Inhabitants		PD/PI Curie, Marie (Contact)	<b>RTD Reporting Period</b> 04/01/2009 - 03/31/202	
Participating Trainee D	etails 😮			
Curie, Pierre Pre-Doc				
To finalize the RTD, it is re training years.	equired to set the trainee's t	raining years with "start date," and if	the trainee is no longer in training, then "end	d date" is also needed to set
	Email eRATest@mail.nih.gov	In Training?	Start Date into Current Degree- Granting Program () None	End Date () None
Research Topic None				
				🕼 Edit
				Open All Sections
✓ Support During Training				
> Faculty Members				
> Degrees				4
> Post-Training Positions				
> Subsequent Grants				

Figure 37: Participating Trainee Detail (RPPR)

**IMPORTANT:** The information displayed in the trainee detail is comprised of information pulled from the trainee's eRA Commons Personal Profile, where available. However, updates made to the xTRACT trainee detail will not update that trainee's Personal Profile in Commons.

### **Trainee Details**

Use the **View** link in the **Trainee Data** panel of the *Participating Trainee Detail* to display the following read-only information, as applicable:

- Commons User ID
- Email

## In Training Data

Use the **Edit** button in the *Participating Trainee Details* panel to modify in training data as described below.

- In Training
- Type
- Research Topic
- Start Date
  - Current Degree-Granting Program for a Predoctoral trainee
  - Postdoctoral Research for Postdoctoral trainee
- End Date (when Trainee Left Program)

**NOTE:** In order to finalize the RTD for an RPPR, all trainees must have a start date in the **In Training Data** section. Additionally, trainees with *No* selected for **In Training** status must have an end date.

## Support During Training

**NOTE:** This section applies to pre-doc and post-doc trainees only.

Sources of support, both within and outside of NIH, are maintained in this section. Click the **Expand** button to view the information.

After a start date has been added for the trainee in *In Training Data*, the **Training Years (TYs)** will be displayed as read-only with corresponding abbreviations for funding sources in **Support During Training**.

**IMPORTANT:** The system will automatically identify the primary source of support as the source of funding with the longest duration. When multiple sources of support exist for a training year, use the **Primary Source of Support** drop-down if you wish to update the primary source of support.

	However, if you wish designate one	of the other sources as primary for that year, p	lease click the provided drop-down	to change the selection.	
Filter:				Showing	1 - 10 of total 2
				Show 10 v per page «	1 2 »
Training Years	*	TY #	Primary Source of support		
01/1999 - 12/1999		TY 1			
01/2000 - 12/2000		TY 2			
01/2001 - 12/2001		TY 3			
01/2002 - 12/2002		TY 4	T32XY0012		
01/2003 - 12/2003		TY 5	34 T32XY0012	Use the dropdown	
01/2004 - 12/2004		TY 6	34 T32XY0012 51 ~	to change the	
01/2005 - 12/2005		TY 7	T32XY0012	primary source	
01/2006 - 12/2006		TY 8	<sup>34</sup> 51		

### Support from This NIH Training Grant

Includes the NIH Grant number, Project Title, and Period of Support.

Support from This NIH Trair	ning Grar	NIH & Other Agency S	Sources of Support 🗿	Other Non-NIH Sources of Support 🗿
Leave of Absence <b>0</b>				
Filter Table	1 Result	5		+ Add This NIH Source of Support ★
NIH Grant 🔺		Project Title 🌻	Period of Support 🗘	Source 🌩
T32ES123456	•••	Long-Term Effects of Radium Exposure on Nearby Inhabitants	05/2020 to 04/2025	XTRACT

- Click the Add This NIH Source of Support button to add support from This NIH Training Grant.
  - a. Enter the start and end dates of funding, then click the **Save** button.
- 2. (Optional) To remove support from **This NIH Training Grant**, click the **e** threedot ellipsis button and select **Delete**.

### NIH & Other Agency Sources of Support

NIH & Other Agency Sources of Support include the Grant number, Project Title, Project Role, Period of Support, and Source.

**IMPORTANT:** You cannot delete training grant appointments that are reported from xTrain.

				from xTRA	AIN			Showing 1 - 3 of tota
NIH Grant	-	Project Title	Ca	annot be de	leted	Support	¢ Source	Action
T32AB6543		Infectious Diseases Training Program			0112005	o 06/2004		
21 T32ZX9873		Infectious Diseases Training Program		_	07/2005	o 06/2006		
145 .6 132101-04442 12 12 IIII Source of	Support	support	ct to add for this NIF ing grant	4	06/2009	o 07/2010	Edit or Delete only available for sources reported from xTRACT	Edit Delete

To add additional NIH or Other Agency support:

1. Select the Add Source of Support button to open the Add Source of Sup-

port pop-up.	
Add This Training Grant Source of Support	×
Source of Support Details	
Funding Source: Infectious Diseases Training Program Role during funding: Trainee Start of Funding (mm/yyyy): End of Funding (mm/yyyy):	
	3
	Save

- 2. Complete the required **Activity Code** and **IC Code** fields.
- 3. Complete other fields as appropriate.
- 4. Click the **Search Funding Sources** button. A list of matches is displayed.
- 5. Click the 🛨 Select this Funding Source button.
- 6. Select the trainee's role from the **Role during funding** drop-down. If you select **Other**, enter a description in the **Other role description** field.
- 7. Enter **Start of Funding** and **End of Funding** to indicate the dates of this person's involvement.

- 8. Click the **Save and Exit** button.
- 9. Click the end three-dot ellipsis button and select **Edit** to modify the source of support.
- 10. (Optional) To remove the source of support, click the **three**-dot ellipsis button and select **Delete**.

### Add Other Non-NIH Sources of Support

Other non-NIH sources of support include Funding Source, Support Type, Project Number, Project Role, and Period of Support.

Support from This NIH Trainin	g Grant 🚺 🔹 NIH & Othe	r Agency Sources of Support <b>1</b>	Other Non-NIH Sources	of Support 🕦
Leave of Absence <b>0</b>				
				+ Add Other Source of Support
Filter Table	Results			★ 🔳 < 1 of 1 ~ >
Funding Source 🔺	Support Type 🌲	Project Number 🌻	Project Role 🌲	Period of Support ≑
Exploring the Effects of Long- Term Radiation Exposure in Nearby Inhabitants	Fellowship		Fellow	05/2022 to 04/2023

To add a source of support:

- 1. Click the **Add Other Source of Support** button to open the *Add Other Source of Support* pop-up.
  - a. To search:
    - Enter search criteria in the fields and click the Search Funding Sources button.
    - Click the Select this Funding Source button for the correct project. The Enter Source of Support Details screen is displayed.
    - Select the trainee's role from the Role during funding drop-down. If you select Other, enter a description in the Other role description field.
    - Enter **Start of Funding** and **End of Funding** to indicate the dates of

this person's involvement.

- Click the **Save and Exit** button.
- b. To create a new source of support:
  - Perform a search, which displays the information box.
  - In the *Information* box (at the top or bottom of the list), click the **create a new funding source here** link.
  - Complete the fields and then click **Create Funding Source** button.
  - Select the trainee's role from the Role during funding drop-down. If you select Other, enter a description in the Other role description field.
  - Enter **Start of Funding** and **End of Funding** to indicate the dates of this person's involvement.
  - Click the **Save and Exit** button.

### Leave of Absence

You can specify a Leave of Absence in this section to account for periods when the trainee remains on the grant but does not receive support from the grant.

Support from This NIH T	raining Grant 🚺	NIH & Other Agency S	Sources of Support 1	Other Non-NIH Sources of Support 1
Leave of Absence <b>1</b>				
				+ Add Leave of Absence
Filter Table	1 Results			▲ 🔳 < 1 of 1 > >
Support Type 🔺			Period of Support ≑	
Leave of Absence Leave of	fAbsence	•••	04/2023 to 06/2023	

To add a Leave of Absence:

1. Click the **Add Leave of Absence** button.

Add Leave of Absence Period	×
Leave of Absence * Required Field	
Start date * mm/yyyy	
End date * mm/yyyyy	
	Cancel Save

- 2. In the *Add Leave of Absence Period* window that appears, enter the start month/year and end month/year for the leave of absence.
- 3. Click **Save**.

### **Faculty Members**

Displays the participating faculty added to the RTD. Click the **Expand** button to view the information.

✓ <u>Faculty Members</u>		
		<b>*</b> +
Curie, Marie	Ť	Add Faculty

To add faculty, select the **Add Faculty Member** button.

**NOTE:** Up to two faculty members may be associated with a student. If there already two faculty members listed, then the **Add Faculty Member** button does not display. To change a faculty member, delete the appropriate one first and then add the new one.

- 1. Use the parameters on the *Search for Person(s)* window to find the faculty member.
- 2. In the Search for Faculty screen, uncheck the box titled Search for persons who

have a Commons affiliation with my institution to search for persons outside of

your institution.

**NOTE:** You must enter a Commons ID, Person ID, or Last Name to perform a search.

Search for Faculty			×
Search Criteria			
* Either Commons User ID or Person ID or * Commons User ID	r Last Name is required to perform person search. * Person ID		
First Name 2	Middle Name	# Last Name Shorts%	
Search for persons who have a Comm	ions affiliation with my institution		
For example: abcd% or %abcd% or ab%cd	nmons ID or Last Name, by using the "%" character. %.		
Search Persons Clear	<u> </u>		
3			Close

Figure 38: Search for Faculty

- 3. Select the **Search Persons** button. All matching records display in the **Person(s)** table.
- 4. In the Persons table, select the **Add to RTD** check box for the person to add to the RTD.
- 5. Click the **Add Person(s)** button.
- 6. (Optional) Repeat the steps above to search for and add other faculty as necessary.

**NOTE:** Once two faculty members are added, the ability to add more is disabled. You must remove a faculty member before you can add a different one.

To remove a faculty member from the RTD, select the **Remove Faculty Member** button.

## Degrees

xTRACT displays a list of completed degrees and associated data in reverse chronological order, with incomplete degrees following. Click the **Expand** button to view the information.

Filter Table	1 Results			<b>*</b> E	< 1 of 1 ~ >
Degree 🔺	Institution ≑	Date Degree Received ≑	Status ≑	Received in Training 🗘	Source ≑
DOCTOR OF PUBLIC	University Of Paris Faculty Of Medicine	05/2018	Completed		xTRACT

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

To add a degree:

- 1. Select the **Add Degree** button.
- 2. Update the fields in the *Create a New Degree* pop-up:
  - **Degree**: Select from the list
  - **Other Degree Text**: Enter the name of the degree if an *OTH* type of degree was selected.
  - **Degree Date**: Enter in MM/YYYY format
  - **Terminal Degree**: Select the **Yes** or **No** as appropriate. When **Yes** is selected, the terminal degree indicator (This is your terminal degree.) displays next to the degree details in the view. A person can only have one terminal degree.
  - Degree Status: Select Completed or In Progress, as appropriate
  - **Received in Training**: Select Yes or No. Up to three degrees can be set as Received in Training.
  - **Degree Institution**: Enter the institution name, one institution per degree. You can search for an institution by selecting the magnifying glass search icon.
- 3. Select the **Save** button to save your changes.

- 4. Repeat for any additional degrees.
- 5. Select the **Close** button when finished.
- 1. To edit a degree, click the hyperlinked degree name.
- 2. To delete a degree, click the **Provide Remove Degree** button for the degree. Degrees with *Commons Profile* as a **Source** cannot be deleted.

### **Post-Training Positions**

1. Click the **Expand** button for the Post-Training Positions panel to display post-training employment position information.

Filter Table     1 Results					
Position (Type) 🔺	Institution 🗘	Department 🗘	Start Date - End Date  ≑	Principal Activity 🗘	Source ≑
Clinical Fellow 📋 Primary Initial Position	University Of Paris Faculty Of Medicine		05/2018 - 04/2020	Primarily Research	xTRACT

The **Source** of positions is displayed as read-only as *xTRACT* (meaning that the position was added to the person in xTRACT) or as *Commons Profile* (meaning that the position is from the Commons Personal Profile of the person).

To add a position:

- 1. Click the Add Position button.
- 2. Provide the following information:
  - **Workforce Sector**: Choose the area of employment: Academia, Government, For-Profit, Nonprofit, Other.
  - **Principal Activity**: Primarily Research, Primarily Teaching, Primarily Clinical, Research-Related, Further Training, or Unrelated to Research.
  - **Position**: Type the title of the position.
  - **Start Date**: Type the month/year the position started.
  - **End Date**: Type the month/year the position ended, or leave blank if employed to present time.

- **Primary Employment Indicator**: Select **Yes** if this is the main employment; otherwise, select **No**.
- Full Time Employment Indicator: Select Full-Time or Part-Time
- **Current/Initial Employment Indicator**: Select **Primary Initial** if this is the initial employment for the trainee, or select **Primary Current** if it is the current employment.
- **Institution**: Enter the institution or start typing to see matches to your typed text.
- **Primary Department of Position**: Enter the department or start typing to see matches to your typed text. Matches for the selected Institution are shown.
- 3. Select the **Save** button to save the changes.
- 4. Repeat to add additional positions.
- 5. To edit a position, click the hyperlinked position name.
- 6. To delete a position, click the Delete this employment button for the position. Positions with *Commons Profile* as a **Source** cannot be deleted.

## Subsequent Grants

1. Click the **Expand** button for the Subsequent Grants panel to display subsequent fellowship, career development, or research grant support obtained from any source after the individual completed training.

Sources of support submitted on the RTD should list the trainee/student in a role such as PD/PI, co-investigator, faculty collaborator, or staff scientist.

**NOTE:** xTRACT prepopulates NIH subsequent grant support from xTrain trainee data when available. You cannot delete prepopulated support records from the Subsequent Grants table.

Under *NIH and Other Agency Sources of Support on Record*, indicate up to five subsequent sources of support to include in the RTD. Each button lets you add a different type of support: **Add Source of Support** button: Add grant support received from NIH and other Agency sources that are on record. If you do not know the specific grant, you can indicate support by entering only the activity code and IC.

**Add Other Source of Support** button: Add sources of grant support received from non-NIH/Agency sources.

On the Subsequent Grants pane, use the **Edit** and **Remove** buttons in the **Action** column to update or remove the funding source as necessary. Mark up to five **Include in RTD** checkboxes to specify which sources of support will be included in the RTD, which allows only five sources. Once you mark five checkboxes, you cannot mark a sixth.

Sources of support that you include on the RTD must list the trainee/student in a project role such as PD/PI, co-investigator, faculty collaborator, or staff scientist. If you mark the checkbox of a record with a non-supported project role, an error will occur when you mark the checkbox, which states: "*Subsequent support may only be reported if the indi-vidual had the following role: PD/PI, Staff Scientist, Faculty, or Co-Investigator.*"

### To add an NIH or Agency grant as a support source:

1. In the *Subsequent Grants* pane, click the **Add Source of Support** button. The *Add Source of Support* popup appears.

Add Source of Support	t		×
Search for and s Search Criteria * Required Field	elect a Funding Sour	rce	
Activity Code *	IC Code *	Serial Number	Suffix Code
Start Date	End Date	PD/PI Last Name	
Institution			
Select One			~
			Cancel <b>Q</b> Search Funding Sources

2. Enter search criteria to search for existing NIH/Agency grants that provided funding. Red asterisks denote required fields.

- 3. Click the **Search Funding Sources** button.
- 4. In the search results, click the **Eselect this Funding Source** button for the funding source you want to add.
- 5. Select the appropriate option from the **Role during funding** drop-down.
- 6. Enter the **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of the individual's involvement.

Progress: 50%		
Step 2: Enter Source of Support Details		
Funding Source: Epigenomics of Patient Outcomes after Aneurysmal SAH Role during funding:	Other role description:	
Trainee	•	
Start of Funding (mm/yyyy):		
10/2016		
End of Funding (mm/yyyy):		
09/2017		

 Click Save and Exit. Alternatively, if you want to add another funding source, click Save and Add Another Source of Support to be returned to the funding search popup.

### To add NIH or Agency support by indicating a generic activity code/IC:

If you were supported by an NIH or Agency grant, but do not know the specific grant number, you can instead generically report the trainee's support by activity code and IC only. For example, if you enter *T32* for the activity code and *CA* for the IC, then *T32CA* will appear on the training table form as the source of support.

1. In the *Subsequent Grants* pane, click the **Add Source of Support** button. The *Add Source of Support* popup appears.

Add Source of Suppor	rt		×
Search for and s Search Criteria * Required Field	select a Funding Sour	rce	
Activity Code *	IC Code *	Serial Number	Suffix Code
Start Date	End Date	PD/PI Last Name	
Institution			
Select One			~
			Cancel <b>Q</b> Search Funding Sources

- 2. In the search criteria, enter an activity code and IC ONLY, and then click the **report activity code and IC directly** link.
- 3. TIn the search results, click the **Select this Funding Source** button for the funding source you want to add.
- 4. Select the appropriate option from the **Role during funding** drop-down.
- 5. Enter the **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of the individual's involvement.

Add Source of Support	×
Progress: 50%	
Step 2: Enter Source of Support Details	
Funding Source: Epigenomics of Patient Outcomes after Aneurysmal SAH Role during funding:	Other role description:
Trainee	
Start of Funding (mm/yyyy):	
10/2016	
End of Funding (mm/yyyy):	
09/2017	
	Save Cancel

 Click Save and Exit. Alternatively, if you want to add another funding source, click Save and Add Another Source of Support to be returned to the funding search popup.

To add support from non-NIH/Agency sources of support:

 In the Subsequent Grants pane, click the Add Other Source of Support button to open the Add Other Source of Support popup.

Add Other Source of Support	×
Search for and select a Funding Sour Search Criteria Type of Funding Source	rce Source of Support
Fellowship Other Research Assistantship	Foundation (Fdn) National Science Foundation (NSF) Non-US (Non-US)
Funding Source Number	Project Title
Ex: ABC-D1234	Ex: metabolic changes and
Start Date (mm/yyyy or yyyy)	End Date (mm/yyyy or yyyy)
	Cancel <b>Q</b> Search Funding Sources

Search for support or create new funding source:

- a. Search for support by entering search criteria and then clicking the **Search Funding Sources** button.
- b. If the funding source you are looking for is shown in search results, click the
   Select this Funding Source button for the funding source you want to add.
- c. If the funding source you are looking for does not appear, find and click the link to **create a new funding source here** where you manually enter the funding source that you would like to cite. Provide information about the funding source you are creating. Red asterisk fields are required. When finished, click the **Create Funding Source** button.
- d. Select the appropriate option from the **Role during funding** drop-down.

e. Enter the **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of the individual's involvement.

Add Source of Support	×
Progress: 50%	
Step 2: Enter Source of Support Details	
Funding Source: Epigenomics of Patient Outcomes after Aneurysmal SAH Role during funding:	Other role description:
Trainee	
Start of Funding (mm/yyyy):	
10/2016	
End of Funding (mm/yyyy):	
09/2017	
	Save Cancel

f. Click **Save and Exit**. Alternatively, if you want to add another funding source, click **Save and Add Another Source of Support** to be returned to the fund-ing search popup.

# **Program Statistics (RPPR)**

RTD	PD/PI	RTD Reporting Period
5T32ES123456-25 Long-Term Effects of Radium Exposure on Nearby Inhabitants	Curie, Marie (Contact)	04/01/2009 - 03/31/2024
Program Statistics 😯		
<b>∗</b> Required Fields		Copy from Prior RTD 💌
* Required Fields Are program statistics applicable for this repor	ting period?	Percentage of Trainees Entering Graduate School 10 Years Ago Who
Are program statistics applicable for this repor Applicable	ting period?	
	ting period?	Percentage of Trainees Entering Graduate School 10 Years Ago Who
Are program statistics applicable for this repor Applicable	ting period?	Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D. *
Are program statistics applicable for this repor Applicable	ting period?	Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D. * 0.0 %

Figure 39: Program Statistics (RPPR)

The **Program Statistics** section is only available for training grants that have Predoctorate Trainees.

- 1. Enter the program statistics as follows:
  - Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D.
  - Average Time to Ph.D. for Trainees in the Last 10 Years (not including leaves of absence)
- 2. Select the **Save Program Statistics** button.

Use the checkbox to indicate that **Program Statistics are not applicable for this reporting period**.

## **Preview PDF (RPPR)**

Select the **Preview PDF** link in the RTD pane on the left side of the screen to open save, and/or print the training tables. An *In Progress* watermark will be printed on the *Training Table* PDF until the RTD is finalized.

A copy of the RTD is downloaded to the browser's default location.

## Finalize RTD (RPPR)

Certain users have the ability to finalize the RTD for a training grant. Finalized RTDs are marked as *Final* and cannot be edited.

To finalize an RTD:

1. Select the **Finalize RTD** link from the **RTD** links on the left side of the screen.

A confirmation message warns: Are you sure you want to finalized this RTD? Once finalized, the RTD cannot be edited?

**IMPORTANT:** Once you finalize, the RTD cannot be edited. Select the **No** button if you do not wish to finalize.

2. Select the **Yes** button to finalize the RTD. A confirmation screen is displayed when the RTD has successfully finalized.

xTRACT generates a PDF version of the training tables without the *In Progress* watermark, updates the status of the RTD to *Final*, and locks the RTD for editing.

You will have the option to view the finalized PDF at any time on the *Search New RTDs* screen and unfinalize the RTD if needed.

New Applications	Search Research Training	Data Sets for New Applications ?	
Search RTD for New Applications	New Data Set Identifier		ata Set Project Title
Initiate RTD for New Application			% or %abcd% or ab%cd% as a wildcard character.
	PD/PI Last Name		
	abcd% or %abcd% or ab%cd%		
		New RTDs	
	RTDs of New Applications	;	
	Filter Table 4	Results	L ■ ( 1 of 1 ~ )
	RTD ID 🔺 Status ≑	Project Title 💠	PD/PI Name 💠
	12498 Dinalized	Exploring the Effects of Long-Term Radiation Exposure in 1	learby Inhabitants Curie, Marie

Click the hyperlinked RTD ID to view the PDF.

Click the Dufinalize New Application button to edit the RTD.

If data are needed to finalize the RPPR RTD, the appropriate error message(s) display as follows:

- Missing Required Data: Start Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.
- Missing Required Data: End Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.

All trainees must have a start date in the **In Training Data** section. Additionally, trainees with **No** selected for **In Training** status must have an end date.

# Prepare RTD for a Renewal Application

To access the screen:

- 1. Search for the training grant on the *Search for Training Grants* screen. Refer to the topic titled Refer to *Search for Training Grants* on page 14 for steps.
- 2. Click the 🛄 three-dot ellipsis button and select the appropriate link to access the

Prepare for Research Training Data Set (RTD) for Renewal screen:

- To initiate the RTD for the renewal application: Select the **Prepare for Rene**wal link.
- To continue working on an initiated RTD: Select the Continue for Renewal link.

**NOTE:** When the renewal is for the final non-competing year, the user will see a pop-up message providing the option of; continuing an RPPR RTD that has been started for the final year; or copying one from a prior year. If an RTD has been started but not finalized, the user will be instructed to cancel the renewal application and finalize the RTD first.

**IMPORTANT:** If the user selects the option to continue without copying data over, that copy option will no longer be available for the RTD being prepared.

The *Prepare Research Training Dataset (RTD) for Renewal* screen opens for the selected training grant.

Use the links listed under **RTD** on the left side of the screen to maintain the specific sections of the RTD:

- Participating Departments/Programs
- Training Support & Summary
- Participating Faculty
- Participating Trainees
- Program Statistics
- Applicants and Entrants
- Appointments

- Preview PDF
- Finalize RTD

Selecting the links above opens the specific section of the RTD. From within, you can add, edit, and/or remove data.

# **Participating Departments and Programs (Renewal)**

Use this section to add/remove partner organizations and departments and programs.

## **Adding Partner Organizations**

If you are working with another organization, you must add the organization before you can add participating departments and programs from that organization.

If you are not working with another organization, you should not add any partner organizations.

- 1. Select Participating Departments/Programs on the left.
- 2. In the **Partner Organizations** pane, click the **Add Partner Organization** button. The Add Partner Organization pane is displayed.
- 3. Click the **Organization** field and begin entering all or part of the organization's name. The dropdown filters to display a list of matches.
- 4. Select the appropriate organization.
- 5. Click the **Save** button. The organization is added to the Partner Organizations pane.
- 6. Repeat for any additional partner organizations.
- 7. To delete a partner organization, click its **Delete** button.

**IMPORTANT:** Deleting a partner organization will delete all data associated with the organization, including departments, programs, and characteristics and census totals.

# Add Departments

- 1. Select Participating Departments/Programs on the left.
- 2. Select the Add Participating Departments or Programs button.

Prepare Research Training Dataset (RTD) fo	or Renewal	
RTD 5T32ES123456-25 Long-Term Effects of Radium Exposure on Nearby Inhabitants	PD/PI Curie, Marie (Contact)	
Participating Departments and Programs	9	
A Participating Departments and Programs have n data for the Renewal RTD.	ot been added to the RTD yet. They are needed to prepa	are Census, Training Support, and Applicant & Entrants
Filter Table 0 Results		
Department or Program Name *		Type 🔶
	No data available in table	
		+ Add Participating Departments or Programs

Figure 40: Adding Departments

- 3. Start typing in the text box. The system will display a list of departments and programs with that character string in a drop-down menu.
- 4. Find the appropriate department in the results list drop-down and select the appropriate department. Major Components are also displayed with the Department to differentiate among departments with the same name in different units of the organization.

Add Participating Departments and Programs	×
Choose your Department or Program  Include Departments Include Programs  Department ● Program	
Start typing to select departments or programs	
Looking for a Program but don't see it listed? You can also <u>create one</u> .	
<ul> <li>Need to make corrections to a name?</li> <li>A Department: Please have a Signing Official contact the Service Desk.</li> <li>Program: Corrections can be made under the ••• menu once you add your selections.</li> </ul>	
Cancel	Save

Figure 41: Searching for Departments

Add Participating Departments and Programs		×
<ul> <li>Required field(s)</li> </ul>		
Partner Organization		
HARVARD SCHOOL OF PUBLIC HEALTH		
Select Department or Program *		
Include Departments		
Include Programs		
▲ Department ● Program		_
pol		
Health Policy And Management▲		
	Cancel	Save

*Figure 42: Selecting the Department* 

5. Select the **Save** button and the department and close the screen.

The *Participating Departments and Programs* screen updates to show the added department(s) in a table. Added programs and departments display in the same table. The **Actions** column includes links for removing and editing the programs and departments.

## **Add Programs**

1. Select the Add Participating Departments or Programs button.

Prepare Research Training Dataset (RTD)	for Renewal	
RTD 5T32ES123456-25 Long-Term Effects of Radium Exposure on Nearby Inhabitants	PD/PI Curie, Marie (Contact)	
Participating Departments and Program	s 😮	
A Participating Departments and Programs have data for the Renewal RTD.	e not been added to the RTD yet. They are needec	t o prepare Census, Training Support, and Applicant & Entrants
Filter Table 0 Results		
Department or Program Name 🔺		Type ≑
	No data available in table	
		+ Add Participating Departments or Programs

Figure 43: Add Participating Departments or Programs Button

 If you wish to add a department or program at a partner organization, click the **Partner Organization** dropdown and select the appropriate organization. If you do not select a partner organization, the departments and programs listed will be for the applicant organization.

**NOTE:** If you are working with partner organizations, you must complete steps 4-7 to add departments or programs for each organization separately. Selecting a different organization before you save will remove the currently selected departments or programs.

- 3. Start typing in the text box. The system will display a list of programs with that character string in a drop-down menu.
- 4. Find the appropriate program in the results list drop-down and select the appropriate program.

The **Action** column updates to show Added for the added program. You can repeat the step to **Add Program** for as many programs as necessary.

To add a Program not available in the search results, select **Create One**. Add **Program Name** (required) and **Program Description** (optional) and select **Create Program and Select as Participating in my RTD**.

Add Participating Departments and Programs	×
Choose your Department or Program  ✓ Include Departments  ✓ Include Programs  A Department  ● Program	
Start typing to select departments or programs	
<b>1</b> Looking for a Program but don't see it listed? You can also <u>create one</u> .	
<ul> <li>Need to make corrections to a name?</li> <li>A Department: Please have a Signing Official contact the Service Desk.</li> <li>Program: Corrections can be made under the ••• menu once you add your selections.</li> </ul>	
Cancel	Save

*Figure 44: Searching for Programs Displaying Create One Hyperlink* 

Add Participating Departments and Programs	$\times$
Create Program, to be added to my list of participating programs on this RTD <b>?</b> * Required field(s) <b>Program Name *</b>	
Radiology	
Program Description	
250 Characters Remaining	le.
Cancel 🗲 Go Back 🖬 Save	e

*Figure 45: Searching for Programs* 

- 5. Click the **Save** or the **Create Program and Select as Participating in my RTD** button to add the program and close the screen.
  - a. After clicking the **Create Program and Select as Participating in my RTD** button, click the subsequent **Save** button.

The *Participating Departments and Programs* screen updates to show the added program(s) in a table. Added programs and departments display in the same table. The **Actions** column includes links for removing and editing the programs and departments.

## **Edit Departments & Programs**

To edit a program or department, select the **Edit** button from the **Actions** column.

Participating De	partments and Programs 🖓			
Participating Pro	ograms and Departments have been succe	sfully saved.		×
Filter Table	2 Results			▲ 田 < 1 of 1 × >
Department or Pro	gram Name 🔺			Type 🌩
Neurology/School C	f Medicine		•••	Department
Radiology				Edit Census

### Figure 46: Edit Button for Programs and Departments

Update the Census information as necessary.

#### **Faculty**

- Total
- Participating

#### **Predoctorates**

- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

### **Postdoctorates**

- Total
- Supported by any HHS Training Award
- Postdocs with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

#### **Undergraduates (replaces Predoctorates and Postdoctorates for T34s only)**

- Total
- TGE Undergrads Supported by this Training Grant

• Supported by any federal STEM Training Award

Faculty					
Total	Participating				
0	0				
Predoctorates					
			Eligible Pre-docs	TGE Pre-docs	
	Supported by any	With Participating	with Participating	Supported by this	
Total	HHS Training Award	Faculty	Faculty	Training Grant	
0	0	0	0	0	
Postdoctorates					
			Eligible Post-docs	TGE Post-docs	
	Supported by any	With Participating	with Participating	Supported by this	
Total	HHS Training Award	Faculty	Faculty	Training Grant	
0	0	0	0	0	

Select the Save and Close button to save the information.

### **Participating Department/Program Detail (Renewal)**

### **Edit Departments & Programs**

To edit a program or department, select the **Edit** button from the **Actions** column.



Figure 47: Edit Button for Programs and Departments

Update the Census information as necessary.

### **Faculty**

- Total
- Participating

### **Predoctorates**

- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

### **Postdoctorates**

- Total
- Supported by any HHS Training Award
- Postdocs with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

### **Undergraduates (replaces Predoctorates and Postdoctorates for T34s only)**

- Total
- TGE Undergrads Supported by this Training Grant
- Supported by any federal STEM Training Award

Participating Department	Census: Neurology/Schoo	ol Of Medicine የ			×
Faculty Total	Participating 0				
Predoctorates	Supported by any HHS Training Award	With Participating Faculty	Eligible Pre-docs with Participating Faculty	TGE Pre-docs Supported by this Training Grant	
0 Postdoctorates	Supported by any	0 With Participating	0 Eligible Post-docs with Participating	TGE Post-docs Supported by this	
Total 0	HHS Training Award	Faculty 0	Faculty 0	Training Grant	
					Cancel Save

Select the **Save and Close** button to save the information.

# **Training Support & Summary (Renewal)**

## **Summary Statistics**

Displays the read-only totals of the following:

- Total Number of Predoc Positions
- Total Number of Postdoc Positions
- Total Number of Short-Term Positions
- Average Grant Support per Participating Faculty Member

The **Average Grant Support per Participating Faculty Member** is the mean of the Current Year Direct Costs in Research Support for each Faculty member.

The total number of positions represent the sums of the positions entered for each Institution Training Grant.

✓ Summary Statistics	
otal Number of Pre-doc Positions 🚯	0
Total Number of Post-doc Positions 🟮	0
Total Number of Short-Term Positions 🟮	0
Average Grant Support per Participating Faculty Member 🚯	\$0

Figure 48: Training Support & Summary

# **Institutional Training Support**

To add currently active, federal institutional training, career development, or research education support available to the participating faculty members:

1. Select the **Add Institutional Training Support** button in the **Institutional Training Support Detail** section.

arphi Institutional Training Support Detail			
NIH and Other Agency Sources of Support on Re	cord		
Filter Table 1 Results		4	< 1 of 1 ~ >
Grant Title 🔺	Award Number 🌻	Project Period 🗘	PD/PI ≑
Long-Term Effects of Radium Exposure on Nearby Inhabitants	T32AA00 -26	04/1997 to 03/2028	Curie, Marie
		+ /	Add Institutional Training Support

Figure 49: Add Institutional Training Support Button

- 2. Search for support by entering any of the criteria on the *Add Institutional Training Support* pop-up. You must enter either an IC Code or PD/PI Last Name.
  - Activity Code
  - IC Code
  - Serial Number
  - Suffix Code
  - Start Date
  - End Date
  - PD/PI Last Name

• Institution

**TIP:** As you type an institution name, a drop-down list of potential matches will begin to populate. Select the institution from that list.

3. Select the Search Funding Sources button.

Add Institutional Training St	upport		×
Search NIH Fund	-		
Activity Code	IC Code *	Serial Number	Suffix Code
Start Date	End Date	PD/PI Last Name *	
mm/dd/yyyy	mm/dd/yyyy		
Institution			
Select One			~
			Close <b>Q</b> Search Funding Sources

4. From the result list, click the **Select** link from the **Action** column for the correct project.

Figure 50: Searching for Funding Sources

The added source of support will display on the *Training Support and Summary* screen.

Click the hyperlinked grant title to edit it.

Click the **Remove Institutional Training Support** button to remove the funding source.

Additional detail can be found in the Institutional Training Support Detail section.

# **Census Totals**

Displays totals for Faculty, Predoctorates, and Postdoctorates.

## **Faculty**

- Total
- Participating

Use the **Edit** button to add to or update the numbers for unique faculty members across participating departments and interdepartmental programs.

### <u>Predoc</u>

The following read-only information is displayed. This data is maintained on the **Par-ticipating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Predoctorates with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

### **Postdoc**

The following read-only information is displayed. This data is maintained on the **Par-ticipating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Postdoctorates with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

## **Institutional Training Support Detail (Renewal)**

Click the hyperlinked grant title on the **Institutional Training Support** section of the *Training Support & Summary* to open the *Editing* screen.

Prepare Research Training Dataset (RTI	)) for Renewal	
RTD	PD/PI	
5T32ES123456-25 Long-Term Effects of Radium Exposure on Nearby Inhabitants	Curie, Marie (Contact)	
Institutional Training Support Detail 💡		
	adium Exposure on Nearby Inhabitants	
Project Title: Long-Term Effects of R Grant Number: R01ES001 -01		
✓ Number of Trainee Positions		
Number of Pre-doc Positions	0	
Number of Post-doc Positions	0	
Number of Short-Term Positions	0	
Number of Participating Faculty	Ū	
		Edit
✓ Overlapping Faculty		
Filter Table 0 Results		
o hestits		
Overlapping Faculty Name 🔺		· · · · · · · · · · · · · · · · · · ·
	No data available in table	
		Add Overlapping Faculty

Figure 51: Institutional Training Support Detail

#### **Number of Trainee Positions**

Use this section to add the number of Predoc, Postdoc, Short-term, and Participating Faculty positions.

- 1. Select the **Edit** button.
- 2. In the Institutional Training Support pop up, enter the appropriate totals.
- 3. Click the **Save** button.

### **Overlapping Faculty**

Use this section to update the number of overlapping faculty.

1. Select the **Add Overlapping Faculty** button.

✓ Overlapping Facu	ulty		
Filter Table	0 Results		
Overlapping Facult	ty Name 🔺		
		No data available in table	
			Add Overlapping Faculty

Figure 52: Add Overlapping Faculty Button

- 2. Click the Add Overlapping Faculty button for any participating faculty members that are also on the Institution Training Grant. If a needed faculty member does not display in the results, then add the faculty member as Participating Faculty as described in the topic titled Refer to *How Do I Manage Participating* 
  - Faculty Members (Renewal)? on page 118 for renewal applications.
- 3. Select the **Close** button.

The Overlapping Faculty Name displays on the *Institutional Training Support Detail* screen with the option to **Remove** the overlapping faculty member. The updated total count of the overlapping faculty is calculated by system and is displayed as read-only.

# How Do I Manage Participating Faculty Members (Renewal)?

Select the *Participating Faculty* link from the **RTD** menu on the left of the screen. This will open the *Participating Faculty Members* table and display the participating faculty added to the RTD - or a message indicating that no faculty have been added, when appropriate.

ew Applications -		ning Dataset (RTD) for New App				
earch RTD for New oplications	New RTD	419 The Effects of Romulan Ale on	Senior Staff			
tiate RTD for New oplication	PD/PI	Shorts, Jim				
rD <del>-</del>	Participating Fa	aculty Members 🛛				
asic Information						
articipating epartments / ograms	Add Faculty					Showing 1 - 7 of tota
aining Support & ummary	Person Name	Commons User ID	Person ID	¢ Em:	ail 🗢	Action
articipating Faculty	White, Snow	WHITESNOW	1234567	eRA	ATest@mail.nih.gov	Edit Remove
	White, Grumpy	WHITEGRUMPY	2345678	eRA	ATest@mail.nih.gov	Edit Remove
articipating Students	White, Doc	WHITEDOC	3456789	eRA	Test@mail.nih.gov	Edit Remove
plicants and Entrants	White, Sleepy	WHITESLEEPY	4567890	eRA	ATest@mail.nih.gov	Edit Remove
eview PDF	White, Happy	WHITEHAPPY	5678901	eRA	ATest@mail.nih.gov	Edit Remove
				eRA		Edit Remove

Figure 53: Participating Faculty Members

# How Do I Add Faculty?

**TIP:** Faculty may be added individually or via a Bulk Upload.

### How Do I Add Faculty Individually?

- Select the Add Faculty button.
  - 1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution.**

**NOTE:** You must enter a Commons User ID, Person ID, or Last Name to perform a search.

2. Select the **Search Persons** button.

earch for Faculty			×
Search Criteria			
* Either Commons User ID or Person IE * Commons User ID	o or Last Name is required to perform person search. * Person ID		
First Name 2	Middle Name	* Last Name Shorts%	
Search for persons who have a Cor	nmons affiliation with my institution		
You can perform a wildcard search on C For example: abcd% or %abcd% or ab%	ommons ID or Last Name, by using the "%" character. cd%.		
Search Persons Clear	_		
3			Close

#### Figure 54: Search for Faculty

 All matching records display in the Person(s) table. Select the Add to RTD check box for the person you wish to add, then click the Add Person(s) button. The person is added to the Participating Faculty Members list.

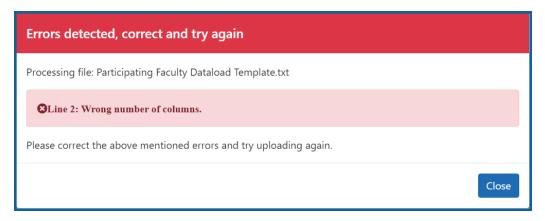
### How Do I Add Faculty Via a Bulk Upload?

- Select the **Upload Participating Faculty** button below the table.
  - The next screen will display the RTD and PD/PI information in the top section. The bottom section, under "Upload Participating Faculty ", contains notes regarding how to perform a bulk upload. Click the **Show More** link for instructions on creating and formatting a tab-delimited file, as well as a link to download a tab-separated (TSV) text template file (.txt). Use these tools to create the upload file.

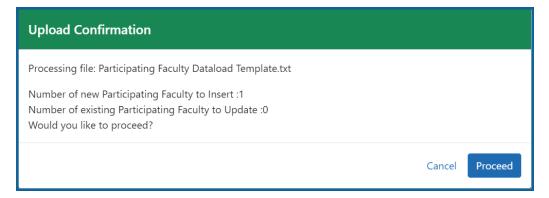
Prepare Re	esearch Training Dataset (RTD) for Revision
RTD	5T32DK123456-15 Gene therapy training: CF and genetic diseases
PD/PI	L'amour, Louis
Upload F	aculty Members
<ul> <li>The file how to d</li> <li>Includin</li> <li>The tab- Training and Rel Careers</li> <li>The Cor</li> <li>If the sa</li> <li>If it is pr Profess</li> <li>If it is pr</li> <li>If they ai Predocs</li> <li>Continu accepte</li> <li>If it is pr for Exect</li> <li>Faculty update fi</li> <li>The dat</li> <li>If the up will only</li> </ul>	mmons User Id is required for each uploaded faculty member. The other columns may be left blank, as appropriate. me Commons ID is provided for multiple entries in the upload file, an error will be reported. ovided, the Rank must be one of the following (without quotations): "ASTP" for Assistant Professor. "ASSP" for Associate or. "PROF" for Professor. "REAP" for Research Assistant Professor. "INST" for Instructor. ovided, the Research Interest must be 240 characters or less. re provided, each of the component values of the mentoring record fields (Predocs in Training, Predocs Graduated, s Continued in Research and Related Careers, Postdocs in Training, Postdocs Completed Training, Postdocs ed in Research and Related Careers) must be a whole positive number (or zero). No fractional portions can be

- 2. Once the upload file has been prepared, use the **browse** link to select and upload the file.
- 3. If there are any errors in the upload file, a message will appear above the filename with a link to details of the errors. These errors will need to be cor-

rected before the upload will succeed.



4. If the upload is accepted, a confirmation message will display. The name of the upload file will display in the field above the **Browse** button.



Click the **Proceed** button. The values from the uploaded document will be updated in the appropriate *Participating Faculty Detail* tables as well. (Rank, Research Interest, Training Roles, Predocs in Training, Predocs Graduated, Predocs Continued in Research and Related Careers, Postdocs in Training, Postdocs Completed Training, and Postdocs Continued in Research and Related Careers)

5. To validate that the table and the details updated correctly, click on the *Participating Faculty* link again in the left-side menu.

## How Do I Edit Faculty Members?

Click the hyperlinked faculty member name to edit the participating faculty details for the selected member. Refer to the topic titled Refer to *Participating Faculty Detail (New* 

Application) on page 43.

# How Do I Remove a Faculty Member?

Select the **Remove Participating Faculty** button to remove the faculty member from the RTD. At the confirmation, select **Delete**.

See Also: Faculty Detail

# **Participating Faculty Detail (Renewal)**

Use the **Expand** button next to each section of the *Participating Faculty Detail* to display it. The **Open All Sections** link reveals all collapsed sections at once.

Prepare Research Training Dataset (RTD) fo	or Renewal		
RTD 5T32ES123456-25 Long-Term Effects of Radium Exposure on Nearby Inhabitants	PD/PI Curie, Marie (Contact)		
Participating Faculty Details 💡			
Curie, Marie			
Commons User ID MARIECURIE	Email eratest@nih.gov	<b>Rank</b> None	
Primary Department or Program	Research Interest	Training Role(s)	
None	None	None	Edit
			Open All Sections
> Faculty Degree			
> Research Support			
> Mentoring Record			

Figure 55: Participating Faculty Details

Each section provides a means for editing the information. Refer to the steps below.

## **Participating Faculty Details**

The **participating Faculty Details** panel of the *Participating Faculty Detail* displays faculty data as described below.

- Commons User ID (read only)
- Email (read only)
- Rank
- Primary Department or Program
- Research Interest
- Training Role(s)

To edit faculty member data:

1. Click the **Edit** button to open the *Edit Faculty Member Data* window:

Edit Faculty Member Data	×
* Required Field	<b>^</b>
Active Faculty in Program	
Rank *	
<ul> <li>Applicant Organization (UNIV OF NORTH CAROLINA CHAPEL HILL)</li> <li>Partner Organization(s)</li> </ul>	
Primary Department or Program	
Select Program department or program	
<ul> <li>Looking for a Program but don't see it listed? Navigate to the Departments and Program's tab to Create a Program.</li> <li>Research Interest</li> </ul>	
enter text	
200 characters remaining	
Training Role	
D/PI	
Preceptor	
Executive Committee member (Exec. Comm.)	
Other Committee member (Other Comm.)	
Other	
Cancel S	ave

 If the faculty member is no longer active in the organization, clear the Active Faculty in Program checkbox. 3. Select an academic rank from the **Rank** drop-down list, or, if the faculty member does not have an academic rank, select **Other** from the **Rank** drop-down, and type the position title in the **Other Rank Title** field.

This lets you provide more accurate position information about grant faculty who hold non-academic positions, such as in government or the private sector. The **Other Rank** field is enabled only if you select **Other** in the **Rank** drop-down list.

- 4. Select the appropriate radio button for the faculty member's organization.
  - a. If you select the **Partner Organization(s)** radio button, the Partner Organization dropdown is displayed. Select the appropriate organization.
  - b. If you do not select the **Partner Organization(s)** radio button, the departments and programs displayed will be for the applicant organization.
- 5. In **Primary Department or Program**, specify a department or program for the faculty member. Type a few letters to see matches from the faculty member's institution. Matches are based on programs previously entered into xTRACT or other eRA modules.

**NOTE:** If you select a partner organization and the desired program or department is not listed, contact the organization's signing official to have them create it.

- 6. Enter the faculty member's area of focus in the **Research Interest** field.
- 7. Select the **Training Role** the faculty member holds for the grant currently being edited. Preceptor is also sometimes referred to as mentor.
- 8. Click the **Save** button.

### **Faculty Degree**

From this panel, you may add a degree, edit a degree, or select a degree to add to an RTD.

1. Click the **Expand** button to view the panel.

Filter Table	3 Results			🕹 🖪	<b>a</b> < 1 of 1 ~ >
Degree 🔺	Institution ≑	Date Degree Received 🗘	Status ≑	Include in RTD 💠	Source ≑
Doctor of Philosophy			Completed		Commons Profile
REGISTERED NURSE			Completed		Commons Profile
MASTER OF SCIENCE			Completed		Commons Profile

The **Source** of degrees is displayed as read-only and as either *xTRACT* (meaning that the degree was added to the person profile in xTRACT) or *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

### Add a Degree

- 1. Select the **Add Degree** button.
- 2. Update the fields in the *Add a Degree* pop-up:
  - **Degree**: Select from the list
  - **Other Degree Text**: Enter if the Degree selected is *OTH (other type of degree)* or another category like *BOTH*, *DDOT*, *DOTH*, *MDOT*, *MOTH*, and *VDOT*.
  - **Degree Date**: Enter in MM/YYYY format
  - **Terminal Degree**: Select the **Yes** or **No** radio button as appropriate. When the **Yes** button is selected, the terminal degree indicator (This is the terminal degree of this person.) displays next to the degree details in the view. Only one degree for a person can be set as the Terminal Degree.
  - **Degree Status**: *Completed* or *In Progress* are the selections available for Faculty degrees.
  - Include in RTD: Yes or No are the options available.
  - **Degree Institution**: Enter the institution name, one institution per degree. Start typing in some of the institution's name and a drop-down menu displays with related institution names.
- 3. Select the **Save** button to save your changes.
- 4. Repeat for any additional degrees.

### Edit a Degree

- 1. Click the hyperlinked degree name to display the *Edit Degree* screen for editing.
- 2. Update the fields as necessary.
- 3. Select the **Save** button or click the **Cancel** button.

### Include in RTD

- 1. Locate the degree you are including in the RTD.
- Check the Include in RTD box for the degree to be displayed in the Participating Faculty Members Training Table on the RTD PDF.

Uncheck the box to exclude the degree.

### Delete a Degree

Select the **Remove Degree** button to delete the degree from the participating faculty detail. Remove Degree is not available if the **Source** of the degree is *Commons Profile*, meaning the degree is from the Commons Personal Profile of the person.

## **Research Support**

This section, under Participating Faculty, details the sources of support for the participating faculty member who is currently being edited.

1. Click the **Expand** button to view the panel.

	Agency 30	urces of Support o	n Record				
Filter Table		1 Results				盘 🔳	< 1 of 1 ~ >
		Role on Projec or	t			Ducin et Ducie d	Current Year Direct Costs ≑
Grant 🕈		Subproject 🌻	Projec	ct Title 🌻		Project Period 🗘	Direct Costs 🖤
Grant  P50AA030407-1 Dther Sources of		Subproject \$	-	c <b>t Title 🗢</b> oject : adsf		02/2023 to 01/2028	\$500,000
P50AA030407-I			-			02/2023 to 01/2028	\$500,00
P50AA030407- Dther Sources o		Project Lead	Subpro		Project Title ≑	02/2023 to 01/2028 + Add Project Lea	\$500,00 Id Source of Support

#### NIH and Other Agency Sources of Support on Record

Use this section to report currently-funded, active NIH or other Agency grants on which this faculty member is working. This list might be automatically populated with records if the faculty member is on record as being funded from NIH and other grants.gov systems. Records that are automatically populated lack an Edit or Remove button and thus are read-only.

Use the **Add Project Lead Source of Support** button to search for other NIH or Agency grants that contain sources of support. If the faculty member is reported on an RPPR, then those grants will be displayed as suggested sources of funding, but you can also find and choose grants outside of that suggested list. Grants not currently funded cannot be added.

To add another source of funding for the current faculty member:

- Under NIH and Other Agency Sources of Support on Record, click the Add Project Lead Source of Support button.
- In the Add Source of Support search window, enter criteria to find grants in which the current participating faculty member is funded.
   Note that this window might contain a list of suggested grants to choose

from before you perform your search. If the faculty member is reported on an RPPR (Research Performance Progress Report) for a component, then those grants will be displayed as suggested sources of funding. You can select suggested sources of funding, or you can find and choose grants outside of that suggested list.

- Enter search criteria in the Add Source of Support window and click the Search button.
- 4. In the search results, click the **Eselect the Funding Source** button for one or more grants that include funding for the current participating faculty member.
- 5. For the selected grant, enter details for the funding source, specifically the subproject the faculty member is working on, and the funding for that subproject.

Add Source of Support				×
Enter Source of Support Details * Required Field				
Funding Source: P50ES123456-07				
<b>Role during funding: *</b> Project Lead				
Subproject Title *				
Project Start Date: 12/2017				
Project End Date: 11/2027				
Current Year Direct Costs: *				
Ci	ancel 🗲 Ba	Save and Add Another	Source of Support	Save and Exit

 Click Save and Add Another Source of Support to find more sources of support, or click Save and Exit if finished with NIH sources of support for this faculty member.

- 7. To edit the source of support, click the hyperlinked grant number.
- To delete the source of support, click the Remove Non-NIH Source of Support button.

### **Other Sources of Support**

Includes Funding Source, Support Type, Project Number, Project Role, Project Title, Project Period, and Current Year Direct Costs.

To add additional support:

- Select the Add Another Source of Support button to display fields for searching/editing to add a non-NIH funding source.
- 2. Search for a funding source:
  - a. Search for support entering the parameters given and selecting Search
     Funding Sources button.
  - b. In the search results, click the **Elect the Funding Source** button for the correct project.
- 3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
- 4. Enter current year direct costs.
- Click Save and Add Another Source of Support to find more sources of support, or click Save and Exit if finished with NIH sources of support for this faculty member.
- 6. To edit the source of support, click the hyperlinked grant number.
- 7. To delete the source of support, click the **Remove Non-NIH Source of Support** button.

### **Mentoring Record**

Click the **Expand** button to view the panel.

Pre-docs in Training	3	
Pre-docs Graduated	12	
Pre-docs Continued in Research or Related Careers	12	
Post-docs in Training	5	
Post-docs Completed Training	7	
Post-docs Continued in Research or Related Careers	7	

The **Mentoring Record** panel of the *Participating Faculty Detail* to display counts of trainees mentored.

- Pre-docs In Training
- Pre-docs Graduated
- Pre-docs Continued in Research or Related Careers
- Post-docs in Training
- Post-docs Completed Training
- Post-docs Continued in Research or Related Careers

Use the **Edit** button to open the fields in a pop-up for editing. Save your changes by selecting the **Save** button on the pop-up.

# **Students (Renewal)**

If both Predoc and Postdoc participating trainees are included in the RTD for the Renewal, this menu item will not be available. If only Predoc trainees are included, then Postdoc Students can be added. If only Postdoc trainees are included, then Predoc Students can be added.

This section displays the students added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove students.

Prepare Research	Training Dataset (RTD)	for Renewal		
RTD 5T32ES123456-25 Long Exposure on Nearby Inha		PD/PI Curie, Marie (Contact)		
Participating Stud	ents 🝞			
Filter Table	2 Results			★
Person Name	Commons	User ID 🌲	Person ID ≑	Student Type 🌻
Curie, Marie	T MARIECUR	IE	140133387	Post-doc
Curie, Pierre	PIERRECUR	IE	140133388	Post-doc
				Upload Participating Students + Add Student

### Figure 56: Students

Students(s) are listed in a table at the bottom of the screen along with the following information:

- Student Name
- Commons User ID (if available)
- Person ID
- **Student Type**: Pre-doc or Post-doc
- Actions
  - The **Edit** link opens the *Student Detail* for the selected trainee. Refer to the topic titled Refer to *Student Detail for a Renewal (Renewal)* on page 135.
  - The **Remove** link removes the person from the RTD.

The **Add Student** feature allows you to search for and add students or create new xTRACT persons to add to the RTD.

## **Add Student**

To add a student:

1. Select the **Add Student** button.

Search for Students		×
Search Criteria * At least one marked field is required to pe	rform person search.	
Commons User ID *	Person ID *	
abcd% or %abcd% or ab%cd%		
You can perform a wildcard search on Commo	ns User ID.	
First Name	Middle Name	Last Name *
		abcd% or %abcd% or ab%cd%
		You can perform a wildcard search on Last name.
Search for persons who have a Comm	ons affiliation with my institution	
		Cancel <b>Q</b> Search Persons

 Enter parameters and select the Search Persons button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled Search for persons who have a Commons affiliation with my institution.

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

All matching records display in the **Person(s)** table. Click the **Add Student** as drop-down in the **Add to RTD** column and select the appropriate option to add
 the person.

**NOTE:** After you perform a search, the **Create a new xTRACT Person here** link is enabled. Use this link to create an xTRACT person record. Refer to the topic titled Refer to *Create xTRACT Person* on page 264

3. Click the Add Person(s) button.

## **Edit Student**

From the list of students, click the hyperlinked student name to edit the student detail.

Refer to the topic titled Refer to Student Detail for a Renewal (Renewal) on page 135.

## Remove

Select the **Remove Student** button to remove the student from the RTD. At the confirmation, select **Yes**.

## **Student Detail for a Renewal (Renewal)**

Use the **Expand** button next to each section of the *Participating Student Detail* to display it. The **Open All Sections** link reveals all collapsed sections at once.

Prepare Research 1	raining Dataset (RTD)	for Renewal		
RTD 5T32ES123456-25 Long-7 Exposure on Nearby Inhab	Ferm Effects of Radium	PD/PI Curie, Marie (Contact)		
Participating Stude	ent Details 😯			
Curie, Pierre Post-I Commons User ID PIERRECURIE	Doc Email eratest@nih.gov	In Training?	Start Date into Postdoctoral Research ① None	End Date ① None
Research Topic None				<b>Z</b> <sup>€</sup> Edit
				Open All Sections
<ul> <li>Faculty Members</li> <li>Degrees</li> </ul>				
> Post-Training Positi	ons			
> Subsequent Grants				
> Publications				<u>↑</u>

Figure 57: Student Detail (Renewal)

Each section provides a means for viewing or editing the information. Refer to the steps below.

## Student Data

Use the **Expand** button next to each section of the *Participating Student Detail* to display it. The **Open All Sections** link reveals all collapsed sections at once.

Prepare Research	Training Dataset (RTD	) for Renewal		
RTD 5T32ES123456-25 Long- Exposure on Nearby Inha		PD/PI Curie, Marie (Contact)		
Participating Stud	ent Details 🝞			
Curie, Pierre Post-	Doc			
Commons User ID PIERRECURIE	Email eratest@nih.gov	In Training?	Start Date into Postdoctoral Research ① None	End Date 🕄 None
Research Topic None				<b>∠</b> Edit
				Open All Section
> Faculty Members				
> Degrees				
> Post-Training Posit	tions			
> Subsequent Grants	s			
> Publications				

Prepare Research	Training Dataset (RTD)	for Revision		
RTD 5T32ES123456-25 Long Exposure on Nearby Inha	-Term Effects of Radium abitants	PD/PI Curie, Marie (Contact)		
Participating Stud	ent Details 😯			
Curie, Pierre Post-	Doc			
Commons User ID PIERRECURIE	<b>Email</b> eratest@nih.gov	In Training?	Start Date into Postdoctoral Research 🕄 None	End Date 🕄 None
Research Topic None				🗹 Edit
				Open All Sections
> Faculty Members				
> Degrees				
> Post-Training Posit	ions			
> Subsequent Grants	;			
> Publications				1

Figure 58: Participating Student Details

Each section provides a means for viewing or editing the information. Refer to the steps below.

### **Participating Student Details**

The **Participating Student Details** panel displays the following read-only information:

- Commons User ID or Person ID
- Email
- In Training?
- Start Date
- End Date
- Research Topic

Use the **Edit** button to open the fields in a pop-up for editing.

- In Training
- Type

- Research Topic
- Start Date
  - Into Current Degree-Granting Program, for a Predoctoral trainee
  - Into Postdoctoral Research, for Postdoctoral trainee
- End Date (when Trainee Left Program)

### **Faculty Members**

1. Click the **Expand** button for the Faculty Members panel to display the faculty members for the student on the RTD.

✓ Faculty Members		
		<b>*</b> +
Curie, Marie	Ť	Add Faculty

2. To add faculty, select the **Add Faculty** button.

**NOTE:** Up to two faculty members may be associated with a student. If there already two faculty members already listed, then the **Add Faculty Member** button does not display. To change a faculty member, delete the appropriate one first and then add the new one.

3. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons** who have a Commons affiliation with my institution.

**NOTE:** You must enter a Commons ID, Person ID, or Last Name to perform a search.

4. Select the **Search Persons** button.

earch for Faculty			
Search Criteria			
Either Commons User ID or Person ID     Commons User ID	or Last Name is required to perform person search.  * Person ID		
First Name 2	Middle Name	* Last Name Shorts%	
Search for persons who have a Com	mons affiliation with my institution		
	ommons ID or Last Name, by using the "%" character. cd%.		
For example: abcd% or %abcd% or ab%			
For example: abcd% or %abcd% or ab% Search Persons Clear			

Figure 59: Search Faculty Member

- 5. All matching records display in the **Person(s)** table. Select the **Add to RTD** check box to add the person to the list of faculty for this student.
- 6. Click the **Add Person(s)** button. The faculty member is added to the student details.
- 7. Search for and add other faculty as necessary, repeating the steps above.

**TIP:** Once two faculty members are added, the ability to add more is disabled.

8. To remove a faculty member from the Student, select the **Remove Faculty Member** button for the faculty member.

#### Degrees

1. Click the **Expand** button for the Degrees panel to display a list of completed degrees and associated data.

Filter Table	1 Results			🕹 🖪	< 1 of 1 ~ >
Degree 🔺	Institution 🗘	Date Degree Received ≑	Status ≑	Received in Training 🗘	Source ≑
	University Of Paris Faculty Of Medicine	05/2015	Completed		xTRACT

The **Source** of degrees is displayed as *xTRACT* (meaning that the degree was added or edited to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

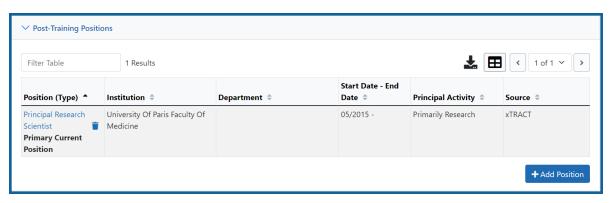
#### To add a degree:

- 1. Select the **Add Degree** button.
- 2. Update the fields in the *Create a New Degree* pop-up:
  - **Degree**: Select from the list
  - **Other Degree Text**: Enter if Degree selected is *OTH (other type of degree)* or another category like BOTH, DDOT, DOTH, MDOT, MOTH, and VDOT.
  - **Degree Date**: Enter in MM/YYYY format
  - **Terminal Degree**: Select the **Yes** or **No**. When **Yes** is selected, the terminal degree indicator (This is the terminal degree of this person.) displays next to the degree details in the view. Only one degree per person can be set as the Terminal Degree.
  - Degree Status: Select Completed or In Progress, as appropriate
  - **Received in Training**: Select Yes or No. Up to three degrees can be selected as Received in Training.
  - **Degree Institution**: Enter the institution name, one institution per degree. Start typing in part of the institution's name and a drop-down menu displays with related institution names. Select the institution name from that menu. If the desired institution name does not appear, a link is provided at the bottom of the drop-down menu that will accept the name of the institution as typed in.
- 3. Select the **Save** button to save the new degree.
- 4. Repeat for any additional degrees.
- 5. To edit a degree, click the hyperlinked degree name.

6. To delete a degree, click the **E Remove Degree** button for the degree. Degrees with *Commons Profile* as a **Source** cannot be deleted.

## **Post-Training Positions**

1. Click the **Expand** button for the Post-Training Positions panel to display post-training position information.



The **Source** of positions is displayed as *xTRACT* (meaning the position was added or updated for the person in xTRACT) or as *Commons Profile* (meaning the position is from the Commons Personal Profile of the person).

### To add a position:

- 1. Click the **Add Position** button.
- 2. Provide the following information:
  - **Workforce Sector**: Choose the area of employment: Academia, Government, For-Profit, Nonprofit, Other.
  - **Principal Activity**: Primarily Research, Primarily Teaching, Primarily Clinical, Research-Related, Further Training, or Unrelated to Research.
  - **Position**: Type the title of the position.
  - Start Date: Type the month/year the position started.
  - **End Date**: Type the month/year the position ended, or leave blank if employed to present time.
  - **Primary Employment Indicator**: Select **Yes** if this is the main employment; otherwise, select **No**.

- Full Time Employment Indicator: Select Full-Time or Part-Time
- **Current/Initial Employment Indicator**: Select **Primary Initial** if this is the initial employment for the trainee, or select **Primary Current** if it is the current employment.
- **Institution**: Enter the institution or start typing to see matches to your typed text.
- **Primary Department of Position**: Enter the department or start typing to see matches to your typed text. Matches for the selected Institution are shown.
- 3. Select the **Save** button to save the changes.
- 4. Repeat to add additional positions.
- 5. To edit a position, click the hyperlinked position name.
- 6. To delete a position, click the **Delete this employment** button for the position. Positions with *Commons Profile* as a **Source** cannot be deleted.

## **Subsequent Grants**

1. Click the **Expand** button for the Subsequent Grants panel to display subsequent fellowship, career development, or research grant support obtained from any source after the individual completed training.

<ol> <li>You may incl</li> </ol>	lude up to 5 sources (	of support in RTD. S	ubsequent support can only be reported	for PD/PI, Staff	Scientist, Faculty or Co-I	nvestigator rol	es.
Filter Table	2 Result	5			🕹 (E	<b>B</b> < 1 c	of 1 🗸
Гуре of Support ▲	Source of Support ‡	Project Number \$	Project Title 🗢	Project Role ‡	Year of Support ≑	Source ≑	Include in RTD
Research 👘 Grant	NIH	R01ES123456	Long-Term Effects of Radium Exposure on Nearby Inhabitants	Co- Investigator	06/2015 to 05/2025	XTRACT	0
Research 👕	National Science Foundation	IIS-1234567	X-Ray Crystallography and the Molecular Structure of DNA	Co- Investigator	05/2020 to 04/2025	XTRACT	

Sources of support submitted on the RTD should list the trainee/student in a role such as PD/PI, co-investigator, faculty collaborator, or staff scientist.

**NOTE:** xTRACT prepopulates NIH subsequent grant support from xTrain trainee data when available. You cannot delete prepopulated support records from the Subsequent Grants table.

Under *NIH and Other Agency Sources of Support on Record*, indicate up to five subsequent sources of support to include in the RTD. Each button lets you add a different type of support:

**Add Source of Support** button: Add grant support received from NIH and other Agency sources that are on record. If you do not know the specific grant, you can indicate support by entering only the activity code and IC.

**Add Other Source of Support** button: Add sources of grant support received from non-NIH/Agency sources.

- 2. To edit a source of support, click the hyperlinked grant name to edit it.
- 3. To delete a source of support, click the **Remove Source of Support** button.
- 4. Mark up to five **Include in RTD** checkboxes to specify which sources of support will be included in the RTD, which allows only five sources. Once you mark five checkboxes, you cannot mark a sixth.

Sources of support that you include on the RTD must list the trainee/student in a project role such as PD/PI, co-investigator, faculty collaborator, or staff scientist. If you mark the checkbox of a record with a non-supported project role, an error will occur when you mark the checkbox, which states: "*Subsequent support may only be reported if the indi-vidual had the following role: PD/PI, Staff Scientist, Faculty, or Co-Investigator.*"

To add an NIH or Agency grant as a support source:

- 1. Enter search criteria to search for existing NIH/Agency grants that provided funding. Red asterisks denote required fields.
- 2. Click the **Search Funding Sources** button.
- 3. In the search results, click the **Eselect this funding source** button for the funding source you want to add.

4. The popup then displays the Step 2: Enter Source of Support Details section. In this popup, choose the role and enter Start of Funding and End of Funding in mm/yyyy format to indicate the dates of the individual's involvement.

Add Source of Support	×
Progress: 50%	
Step 2: Enter Source of Support Details	
Funding Source: Epigenomics of Patient Outcomes after Aneurysmal SAH Role during funding:	Other role description:
Trainee	
Start of Funding (mm/yyyy):	
10/2016	
End of Funding (mm/yyyy):	
09/2017	
	Save Cancel

 Click the Save and Exit button. Alternatively, if you want to add another funding source, click the Save and Add Another Source of Support button to be returned to the funding search popup.

To add support from non-NIH/Agency sources of support:

1. In the *Subsequent Grants* pane, click the **Add Other Source of Support** button to open the *Add Other Source of Support* popup.

Add Other Source of Support	×
Search for and select a Funding Sou Search Criteria Type of Funding Source	ITCE Source of Support
Fellowship Other Research Assistantship	Foundation (Fdn) National Science Foundation (NSF) Non-US (Non-US)
Funding Source Number	Project Title
Ex: ABC-D1234	Ex: metabolic changes and
Start Date (mm/yyyy or yyyy)	End Date (mm/yyyy or yyyy)
	Cancel <b>Q</b> Search Funding Sources

- 5. Search for support by entering search criteria.
- 6. Click the Search Funding Sources button.
- 7. In the search results, click the **ESelect this funding source** button for the funding source you want to add.
- 8. If the funding source you are looking for does not appear, click the link to **create a new funding source here**.

Search for and select a Funding * Required field(s)	g Source
Type of Funding Source *	Source of Support *
Select One	Select One
Project Title *	Funding Source Number
Start Date (mm/yyyy or yyyy)	End Date (mm/yyyy or yyyy)
mm/yyyy or yyyy	mm/yyyy or yyyy
Description	

- a. Manually enter the funding source that you would like to cite. Provide information about the funding source you are creating. Red asterisk fields are required.
- b. When finished, click the **Create Funding Source** button.

Add Other Source of Support	×
Enter Source of Support Details * Required Field	
Funding Source: Exploring the Effects of Long-Term Radiation Exposure in Nearby Inhabitants Role during funding: *	
Select Start of Funding *	
mm/yyyy End of Funding * mm/yyyy	
	Rack Save and Add Another Source of Support     Save and Evit
Cancel	Cave and Add Another Source of Support

- c. Select an option from the **Role during funding** dropdown.
- d. Enter Start of Funding and End of Funding in mm/yyyy format.
- e. Click the Save and Exit button.

# Publications

Click the **Expand** button for the Publications panel to display peer-reviewed publications and manuscripts accepted for publication in peer-reviewed journals.

✓ Publications			
• Note: For any past participant who exited the program more than 10 years ago, that person's publication information will not appear in table 5 of the RTD.			
You cannot add a publication if its supervising Faculty member is not listed. <b>Existing Faculty Added to the RTD:</b> • Curie, Marie • Sklodowska, Salomea • Curie, Plerre			
If the supervising faculty member is not its	If the supervising Faculty member is not listed, add the Faculty Member first, then add a publication.		
□ There are no publications for this stude	nt.		
		+ Add Publ	ication Manually + Add PubMed Publication
Filter Table	sults		↓ 田 < 1 of 1 >
Authors A	Title ≑	PMID \$	Faculty Member 🗘
Curie, M, Sklodowska, S, and Curie, P	Long-Term Effects of Radium Exposure on Nearby Inhabitants	27804982	Curie, Marie

For students/trainees, list all publications resulting from their period of training in the participating faculty member's laboratory or in association with the current training program, through completion of their degree. Do not list publications resulting from work done prior to entering the training program or arising from research initiated after the completion of the program.

#### To indicate the trainee/student has no publications:

In the Publications section, click the checkbox titled *Check this box if there are no publications for this trainee*. **NOTE:** This button does not appear until you add faculty to the RTD using the Participating Faculty section.

The No Publications popup appears.

- 2. Select the Faculty Member and Reason for No Publications, and click Save.
- If you change your mind and want to add a publication, clear the checkbox and the Add Publication button reappears.

### To add a publication by searching PubMed/PubMed Central:

1. In the Publications section, click the **Add Publication** button.

**NOTE:** This button does not appear until you add faculty to the RTD using the Participating Faculty section.

The *Add Publication* popup appears, where you search for the publications to add or manually enter an article citation.

Add PubMed Publication for Curie, Pierre		
Search Publication on PubMe	ed	
PubMed ID/PubMed Central ID		
e.g. 123456789,PMC1234567		
Enter one or more IDs, separated by comm	nas.	
Author First Name	Author Last Name	Title
e.g. Jane	e.g. Doe	Enter a keyword
		Cancel Q Search PubMed

- 2. Enter search criteria using one of the methods below.
  - a. Pub Med ID/PubMed Central ID: Enter IDs for articles listed in PubMed or PubMed Central. To search for multiple articles at once, enter a comma separated list of IDs, which can be from either PubMed or PubMed Central. Precede PubMed Central IDs with "PMC" as shown below. Examples:
    - Enter **PMC7679077** to search for a PubMed Central article (PMCID)
    - Enter **32226987** to search for a PubMed article (PMID)
    - Enter PMC7679077, 32226987 to search for both articles at once

- b. **First Name.** Enter all or a portion of the first name; articles with the text you enter here are found.
- c. Last Name. Enter the *exact last name*; only exact matching last names are found.
- d. **Title.**For publication title, enter one or more keywords; only those publications whose titles that contain all keywords are found.
- 3. Click the **Search** button. The Publication Search Results appear, where you can add any number of publications by marking their checkboxes.
- 4. To add a publication from search results:
  - 1. Select its **Include in RTD** checkbox
  - 2. Choose from the **Faculty Member** dropdown. The faculty members listed are those in the Participating Faculty section of this RTD in XTRACT.
  - 3. Choose the current trainee/student that you are editing from the **Author** dropdown. The list of authors is pulled from PubMed/PubMed Central.
  - 4. Click the **Save** button.

If you indicate a **Faculty Member**, an **Author**, or mark the checkbox of a publication, but omit the rest of the fields, then you will receive the warning on saving: *No publications were selected to report on the RTD*. This means that the publication won't be added due to insufficient information for the publication. Before saving, be sure to fill out all required fields for a publication record that you want to add.

#### To add a publication by manually citing it:

Instead of searching for PubMed/PubMed Central publications, you can manually enter all the necessary information to create a citation.

- In the Publications section, click the Add Publication Manually button.
   NOTE: This button does not appear until you add faculty to the RTD using the Participating Faculty section.
- 2. The Manually Add Publication popup appears.

- a. The information needed to define a citation is shown on the screen -- Title, Journal, Faculty Member, Volume, Inclusive Pages, Year, and Authors. Enter information for all fields that apply, being sure to enter information for the required fields that have a red asterisk.
  - b. You can enter multiple authors to compile a list of all authors of the publication. To add an author, enter the author's name in the **Authors** text box and click the **Add Author** button:

Repeat to add more authors. As authors are entered, the list of authors is displayed as shown below. Use the controls to re-order the list.

Select the student's name and click the **Highlight This Student** button.

- c. When finished entering the citation information, click the **Review** button, which gives you the opportunity to review the citation you entered.
- 4. Click the **Add** button to add the manual citation.

The publications you added appear in a table in the Publications section.

Click the **end** three-dot ellipsis button and select **Edit Publication** or **Delete Publication** to update or remove a publication.

# **Participating Trainees (Renewal)**

Displays the participating trainees added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove participating trainees.

Prepare Research Tra	ining Data	set (RTD) for Renewal				
RTD 5T32ES123456-25 Long-Ter Exposure on Nearby Inhabita		PD/PI dium Curie, Marie (Cor	ntact)			
Participating Trainee	5 🕜					
Filter Table	63 Results				≵ 🖽	< 1 of 3 ~ >
Person Name 🔺		Commons User ID 🗘	Person ID ≑	Trainee Type 🌲	Start Date 🌲	End Date ≑
Ulam, Joseph	Î	ULAMJOSEPH		Post-doc	2021-10-01	2023-09-01
Curie, Pierre		CURIEPIERRE		Post-doc	2008-06-01	2010-06-01
		SKLODOWSKA, SALOMEA		Post-doc	2014-09-01	2016-09-01

Figure 60: Participating Trainees

Participating trainee(s) are listed in a table at the bottom of the screen along with the following information:

- Person Name
- **Commons User ID** (if available)
- Person ID
- **Trainee Type**: Pre-doc; Post-doc; Short Term
- Start Date
- End Date
- The hyperlinked trainee name opens the *Participating Trainee Detail* for the selected trainee. Refer to the topic titled Refer to *Participating Trainee Detail (RPPR)* on page 84.
- The **Remove Trainee** button removes the person from the RTD.

The **Add Trainee** feature allows you to search for and add existing trainees or create new xTRACT persons to add to the RTD.

# Add Trainee(s)

#### To add an individual trainee:

- 1. Select the **Add Trainee** button.
- 2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

3. All matching records display in the **Person(s)** table. Click the **Add Trainee as** dropdown in the **Add to RTD** and select the appropriate option to add the person.

**NOTE:** After you perform a search, the **Create xTRACT Person** button is enabled. Use this button to create an xTRACT Person record. Refer to the topic titled Refer to *Create xTRACT Person* on page 264

4. Click the **Add Person(s)** button to add them to the RTD.

## To add multiple trainees via Bulk Upload:

- 1. Click the **Upload Participating Trainees** link below the *Participating Trainees* table.
- 2. The top part of the Upload Participating Trainees section of the page will list the guidelines for the upload file. Click the **Show More** link to view them.
- 3. A link is displayed below the guidelines to download a template showing the file format.
- 4. Click the **Browse** button at the bottom of the section to go to the file location for an existing upload file.

- 5. When the file is selected, the system will perform a validation to ensure that the file conforms to the correct format and that the data satisfies the conditions described in the guidelines.
  - A pop-up message will display if the format is not valid and that file will not be uploaded. Any data validation errors must be corrected before any changes are accepted and applied.
  - If there are no validation errors then the data will be applied and a success message will appear.

# Edit Trainee

From the list of trainees, click a hyperlinked trainee name to edit the trainee detail for the selected trainee.

Refer to the topic titled Refer to *Participating Trainee Detail (Renewal)* on page 153.

## Remove

Select the **Part Remove Trainee** button to remove the trainee from the RTD. At the confirmation, select **Delete**.

## **Participating Trainee Detail (Renewal)**

While preparing an RTD for a Renewal, you can open the *Participating Trainee Detail* for a trainee by clicking the trainee's hyperlinked name. The *Participating Trainee Data* for the selected person is grouped into panels. Use the **Expand** button and **Edit** buttons and links to display and edit the information as detailed below.

Prepare Research Training Dataset (RTD)	) for Renewal		
RTD 5T32ES123456-25 Long-Term Effects of Radium Exposure on Nearby Inhabitants	PD/PI Curie, Marie (Contact)		
Participating Trainee Details 🝞			
Curie. Pierre Post-Doc Person ID Email	In Training? Yes	Start Date into Postdoctoral Research ① 08/2021	End Date () 07/2023
Research Topic			C Edit
			Open All Sections
$\checkmark$ Support During Training			
> Faculty Members			
> Degrees			
> Post-Training Positions			
> Subsequent Grants			1
> Publications			

Figure 61: Participating Trainee Detail (Renewal)

**IMPORTANT:** The information displayed in the trainee detail is comprised of information pulled from the trainee's eRA Commons Personal Profile, where available. However, updates made to the xTRACT trainee detail will not update that trainees Personal Profile in Commons.

#### **Trainee Details**

Use the **View** link in the **Trainee Data** panel of the *Participating Trainee Detail* to display the following read-only information, as applicable:

- Commons User ID
- Email

## In Training Data

Use the **Edit** button in the *Participating Trainee Details* panel to modify in training data as described below.

- In Training
- Type
- Research Topic
- Start Date
  - Current Degree-Granting Program for a Predoctoral trainee
  - Postdoctoral Research for Postdoctoral trainee
- End Date (when Trainee Left Program)

**NOTE:** In order to finalize the RTD for an RPPR, all trainees must have a start date in the **In Training Data** section. Additionally, trainees with *No* selected for **In Training** status must have an end date.

## Support During Training

**NOTE:** This section applies to pre-doc and post-doc trainees only.

Sources of support, both within and outside of NIH, are maintained in this section. Click

the **Expand** button to view the information.

After a start date has been added for the trainee in *In Training Data*, the **Training Years (TYs)** will be displayed as read-only with corresponding abbreviations for funding sources in **Support During Training**.

**IMPORTANT:** The system will automatically identify the primary source of support as the source of funding with the longest duration. When multiple sources of support exist for a training year, use the **Primary Source of Support** drop-down if you wish to update the primary source of support.

	However, if you wish designate one	of the other sources as primary for that year, p	lease click the provided drop-down	to change the selection.	
Filter:				Showing	1 - 10 of total 2
				Show 10 v per page «	1 2 »
Training Years	*	TY #	Primary Source of support		
01/1999 - 12/1999		TY 1			
01/2000 - 12/2000		TY 2			
01/2001 - 12/2001		TY 3			
01/2002 - 12/2002		TY 4	T32XY0012		
01/2003 - 12/2003		TY 5	34 T32XY0012	Use the dropdown	
01/2004 - 12/2004		TY 6	34 T32XY0012 51 ~	to change the	
01/2005 - 12/2005		TY 7	T32XY0012	primary source	
01/2006 - 12/2006		TY 8	<sup>34</sup> 51		

#### Support from This NIH Training Grant

Includes the NIH Grant number, Project Title, and Period of Support.

Support from This NIH Trair	ning Grar	NIH & Other Agency S	Sources of Support 🗿	Other Non-NIH Sources of Support 🗿
Leave of Absence <b>0</b>				
Filter Table	1 Result	5		+ Add This NIH Source of Support ★
NIH Grant 🔺		Project Title 🌻	Period of Support 🗘	Source 🌩
T32ES123456	•••	Long-Term Effects of Radium Exposure on Nearby Inhabitants	05/2020 to 04/2025	XTRACT

- Click the Add This NIH Source of Support button to add support from This NIH Training Grant.
  - a. Enter the start and end dates of funding, then click the **Save** button.
- 2. (Optional) To remove support from **This NIH Training Grant**, click the **e** threedot ellipsis button and select **Delete**.

#### NIH & Other Agency Sources of Support

NIH & Other Agency Sources of Support include the Grant number, Project Title, Project Role, Period of Support, and Source.

**IMPORTANT:** You cannot delete training grant appointments that are reported from xTrain.

This NIH Training Grar				ources repo from xTRA	N			Showing 1 - 3 of to
NIH Grant	-	Project Title	ca	innot be del	eted	f Support	¢ Source	Action
T32AB6543	1	Infectious Diseases Training Program			0112003	to 06/2004		
21 T32ZX9873	1	Infectious Diseases Training Program			07/2005	to 06/2006		
145 13252 04492 12		Infectious Diseases Training Program	o add		06/2009	to 07/2010	Edit or Delete only available for sources	Edit Delete
			this NIH		06/2009	10 07/2010		Edit Delete

To add additional NIH or Other Agency support:

- 1. Enter **Start of Funding** and **End of Funding** to indicate the dates of this person's involvement.
- 2. Click the **Save and Exit** button.
- 3. Click the end three-dot ellipsis button and select **Edit** to modify the source of support.
- (Optional) To remove the source of support, click the three-dot ellipsis button and select **Delete**.

#### Add Other Non-NIH Sources of Support

#### **Faculty Members**

Displays the participating faculty added to the RTD. Click the **Expand** button to view the information.

Other non-NIH sources of support include Funding Source, Support Type, Project Number, Project Role, and Period of Support.

Support from This NIH Trainin	ig Grant 🚺 🛛 NIH & Othe	r Agency Sources of Support <b>1</b>	Other Non-NIH Sources	of Support 1
Leave of Absence <b>0</b>				
				+ Add Other Source of Support
Filter Table 1	Results			★ 1 of 1 ∨ >
Funding Source 🔺	Support Type 🌲	Project Number 🌻	Project Role 🌲	Period of Support 🜲
Exploring the Effects of Long- Term Radiation Exposure in Nearby Inhabitants	Fellowship		Fellow	05/2022 to 04/2023

To add a source of support:

- Click the Add Other Source of Support button to open the Add Other Source of Support pop-up.
  - a. To search:
    - Enter search criteria in the fields and click the Search Funding Sources button.
    - <sup>°</sup> Click the **Enter Select this Funding Source** button for the correct project. The Enter Source of Support Details screen is displayed.
    - Select the trainee's role from the Role during funding drop-down. If you select Other, enter a description in the Other role description field.
    - Enter **Start of Funding** and **End of Funding** to indicate the dates of this person's involvement.
    - Click the **Save and Exit** button.
  - b. To create a new source of support:
    - Perform a search, which displays the information box.
    - In the *Information* box (at the top or bottom of the list), click the **create a new funding source here** link.
    - Complete the fields and then click **Create Funding Source** button.
    - Select the trainee's role from the Role during funding drop-down. If you select Other, enter a description in the Other role description field.
    - Enter **Start of Funding** and **End of Funding** to indicate the dates of

- this person's involvement.
- ° Click the **Save and Exit** button.

#### Leave of Absence

You can specify a Leave of Absence in this section to account for periods when the trainee remains on the grant but does not receive support from the grant.

Support from This NIH T	raining Grant 🚺	NIH & Other Agency S	ources of Support 1	Other Non-NIH Sources of Support 1
Leave of Absence <b>1</b>				
				+ Add Leave of Absence
Filter Table	1 Results			★ 🖪 < 1 of 1 × >
Support Type 🔺			Period of Support 🗘	
Leave of Absence Leave of	Absence	•••	04/2023 to 06/2023	

#### To add a Leave of Absence:

1. Click the **Add Leave of Absence** button.

Add Leave of Absence Period		×
Leave of Absence		
* Required Field Start date *		
mm/yyyy		
End date * mm/yyyy		
	Cancel	Save

- 2. In the *Add Leave of Absence Period* window that appears, enter the start month/year and end month/year for the leave of absence.
- 3. Click Save.

✓ Faculty Members			
<b>.</b>		<b>*</b> +	
Curie, Marie	Î	Add Faculty	

To add faculty, select the **Add Faculty Member** button.

**NOTE:** Up to two faculty members may be associated with a student. If there already two faculty members listed, then the **Add Faculty Member** button does not display. To change a faculty member, delete the appropriate one first and then add the new one.

- 1. Use the parameters on the *Search for Person(s)* window to find the faculty member.
- 2. In the Search for Faculty screen, uncheck the box titled Search for persons who

**have a Commons affiliation with my institution** to search for persons outside of your institution.

**NOTE:** You must enter a Commons ID, Person ID, or Last Name to perform a search.

Search for Faculty			×
Search Criteria			
Either Commons User ID or Person ID o     Commons User ID	r Last Name is required to perform person search. * Person ID		
First Name 2	Middle Name	* Last Name	
Search for persons who have a Comm	nons affiliation with my institution	Shorts%	
You can perform a wildcard search on Con For example: abcd% or %abcd% or ab%co	nmons ID or Last Name, by using the "%" character. %.		
Search Persons Clear			
3			
	J		Close

*Figure 62: Search for Faculty* 

- 3. Select the **Search Persons** button. All matching records display in the **Person(s)** table.
- In the Persons table, select the Add to RTD check box for the person to add to the RTD.
- 5. Click the Add Person(s) button.

6. (Optional) Repeat the steps above to search for and add other faculty as necessary.

**NOTE:** Once two faculty members are added, the ability to add more is disabled. You must remove a faculty member before you can add a different one.

To remove a faculty member from the RTD, select the **Remove Faculty Member** button.

#### Degrees

xTRACT displays a list of completed degrees and associated data in reverse chronological order, with incomplete degrees following. Click the **Expand** button to view the information.

✓ Degrees						
Filter Table 1 Results						
Degree 🔺	Institution ≑	Date Degree Received ≑	Status 🌩	Received in Training 🗘	Source ≑	
DOCTOR OF PUBLIC	University Of Paris Faculty Of Medicine	05/2018	Completed		xTRACT	
🙀 Terminal Degree					+ Add Degree	

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

To add a degree:

- 1. Select the **Add Degree** button.
- 2. Update the fields in the *Create a New Degree* pop-up:
  - **Degree**: Select from the list
  - **Other Degree Text**: Enter the name of the degree if an *OTH* type of degree was selected.
  - **Degree Date**: Enter in MM/YYYY format
  - **Terminal Degree**: Select the **Yes** or **No** as appropriate. When **Yes** is selected, the terminal degree indicator (This is your terminal degree.) displays next

to the degree details in the view. A person can only have one terminal degree.

- Degree Status: Select Completed or In Progress, as appropriate
- **Received in Training**: Select Yes or No. Up to three degrees can be set as Received in Training.
- **Degree Institution**: Enter the institution name, one institution per degree. You can search for an institution by selecting the magnifying glass search icon.
- 3. Select the **Save** button to save your changes.
- 4. Repeat for any additional degrees.
- 5. Select the **Close** button when finished.
- 1. To edit a degree, click the hyperlinked degree name.
- 2. To delete a degree, click the **ERemove Degree** button for the degree. Degrees with *Commons Profile* as a **Source** cannot be deleted.

## **Post-Training Positions**

1. Click the **Expand** button for the Post-Training Positions panel to display post-training employment position information.

Filter Table 1 Results						
Position (Type) 🔺	Institution ≑	Department 🌻	Start Date - End Date  ≑	Principal Activity 🗘	Source ≑	
Clinical Fellow <b>T</b> Primary Initial Position	University Of Paris Faculty Of Medicine		05/2018 - 04/2020	Primarily Research	xTRACT	

The **Source** of positions is displayed as read-only as *xTRACT* (meaning that the position was added to the person in xTRACT) or as *Commons Profile* (meaning that the position is from the Commons Personal Profile of the person).

To add a position:

- 1. Click the **Add Position** button.
- 2. Provide the following information:
  - **Workforce Sector**: Choose the area of employment: Academia, Government, For-Profit, Nonprofit, Other.
  - **Principal Activity**: Primarily Research, Primarily Teaching, Primarily Clinical, Research-Related, Further Training, or Unrelated to Research.
  - **Position**: Type the title of the position.
  - **Start Date**: Type the month/year the position started.
  - **End Date**: Type the month/year the position ended, or leave blank if employed to present time.
  - **Primary Employment Indicator**: Select **Yes** if this is the main employment; otherwise, select **No**.
  - Full Time Employment Indicator: Select Full-Time or Part-Time
  - **Current/Initial Employment Indicator**: Select **Primary Initial** if this is the initial employment for the trainee, or select **Primary Current** if it is the current employment.
  - **Institution**: Enter the institution or start typing to see matches to your typed text.
  - **Primary Department of Position**: Enter the department or start typing to see matches to your typed text. Matches for the selected Institution are shown.
- 3. Select the **Save** button to save the changes.
- 4. Repeat to add additional positions.
- 5. To edit a position, click the hyperlinked position name.
- 6. To delete a position, click the **Delete this employment** button for the position. Positions with *Commons Profile* as a **Source** cannot be deleted.

## **Subsequent Grants**

1. Click the **Expand** button for the Subsequent Grants panel to display subsequent fellowship, career development, or research grant support obtained from any source after the individual completed training. Sources of support submitted on the RTD should list the trainee/student in a role such as PD/PI, co-investigator, faculty collaborator, or staff scientist.

**NOTE:** xTRACT prepopulates NIH subsequent grant support from xTrain trainee data when available. You cannot delete prepopulated support records from the Subsequent Grants table.

Under *NIH and Other Agency Sources of Support on Record*, indicate up to five subsequent sources of support to include in the RTD. Each button lets you add a different type of support:

**Add Source of Support** button: Add grant support received from NIH and other Agency sources that are on record. If you do not know the specific grant, you can indicate support by entering only the activity code and IC.

**Add Other Source of Support** button: Add sources of grant support received from non-NIH/Agency sources.

On the Subsequent Grants pane, use the **Edit** and **Remove** buttons in the **Action** column to update or remove the funding source as necessary. Mark up to five **Include in RTD** checkboxes to specify which sources of support will be included in the RTD, which allows only five sources. Once you mark five checkboxes, you cannot mark a sixth.

Sources of support that you include on the RTD must list the trainee/student in a project role such as PD/PI, co-investigator, faculty collaborator, or staff scientist. If you mark the checkbox of a record with a non-supported project role, an error will occur when you mark the checkbox, which states: "*Subsequent support may only be reported if the indi-vidual had the following role: PD/PI, Staff Scientist, Faculty, or Co-Investigator.*"

#### To add an NIH or Agency grant as a support source:

1. In the *Subsequent Grants* pane, click the **Add Source of Support** button. The *Add Source of Support* popup appears.

Add Source of Suppor	ť		×
Search for and s Search Criteria * Required Field	select a Funding Sour	rce	
Activity Code *	IC Code *	Serial Number	Suffix Code
Start Date	End Date	PD/PI Last Name	
Institution			
Select One			~
			Cancel <b>Q</b> Search Funding Sources

- 2. Enter search criteria to search for existing NIH/Agency grants that provided funding. Red asterisks denote required fields.
- 3. Click the Search Funding Sources button.
- 4. In the search results, click the **Select this Funding Source** button for the funding source you want to add.
- 5. Select the appropriate option from the **Role during funding** drop-down.
- 6. Enter the **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of the individual's involvement.

Add Source of Support	×
Progress: 50%	
Step 2: Enter Source of Support Details	
Funding Source: Epigenomics of Patient Outcomes after Aneurysmal SAH Role during funding:	Other role description:
Trainee	
Start of Funding (mm/yyyy):	
10/2016	
End of Funding (mm/yyyy):	
09/2017	
	Save Cancel

 Click Save and Exit. Alternatively, if you want to add another funding source, click Save and Add Another Source of Support to be returned to the funding search popup.

To add NIH or Agency support by indicating a generic activity code/IC:

If you were supported by an NIH or Agency grant, but do not know the specific grant number, you can instead generically report the trainee's support by activity code and IC only. For example, if you enter *T32* for the activity code and *CA* for the IC, then *T32CA* will appear on the training table form as the source of support.

1. In the *Subsequent Grants* pane, click the **Add Source of Support** button. The *Add Source of Support* popup appears.

Add Source of Support			×
Search for and se Search Criteria * Required Field	elect a Funding Sou	irce	
Activity Code <b>*</b>	IC Code *	Serial Number	Suffix Code
Start Date	End Date	PD/PI Last Name	
Institution			
Select One			~
			Cancel <b>Q</b> Search Funding Sources

- 2. In the search criteria, enter an activity code and IC ONLY, and then click the **report activity code and IC directly** link.
- 3. TIn the search results, click the **ESelect this Funding Source** button for the funding source you want to add.
- 4. Select the appropriate option from the **Role during funding** drop-down.
- 5. Enter the **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of the individual's involvement.

Progress: 50 <sup>4</sup>	6		
Step 2: Enter Source of Support Details			
Funding Source: Epigenomics of Patient Outcomes after Aneurysmal SAH Role during funding:		Other role description:	
Trainee	-		
Start of Funding (mm/yyyy):			
10/2016			
End of Funding (mm/yyyy):			
09/2017			

 Click Save and Exit. Alternatively, if you want to add another funding source, click Save and Add Another Source of Support to be returned to the funding search popup.

To add support from non-NIH/Agency sources of support:

1. In the *Subsequent Grants* pane, click the **Add Other Source of Support** button to open the *Add Other Source of Support* popup.

Add Other Source of Support					
Search for and select a Funding Sour Search Criteria Type of Funding Source	YCE Source of Support				
Fellowship Other Research Assistantship	Foundation (Fdn) National Science Foundation (NSF) Non-US (Non-US)				
Funding Source Number	Project Title				
Ex: ABC-D1234	Ex: metabolic changes and				
Start Date (mm/yyyy or yyyy)	End Date (mm/yyyy or yyyy)				
	Cancel <b>Q</b> Search Funding Sources				

Search for support or create new funding source:

- a. Search for support by entering search criteria and then clicking the **Search Funding Sources** button.
- b. If the funding source you are looking for is shown in search results, click the Select this Funding Source button for the funding source you want to add.
- c. If the funding source you are looking for does not appear, find and click the link to **create a new funding source here** where you manually enter the funding source that you would like to cite. Provide information about the funding source you are creating. Red asterisk fields are required. When finished, click the **Create Funding Source** button.
- d. Select the appropriate option from the **Role during funding** drop-down.
- e. Enter the **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of the individual's involvement.

Add Source of Support			
Progress: 50%			
Step 2: Enter Source of Support Details			
Funding Source: Epigenomics of Patient Outcomes after Aneurysmal SAH Role during funding:	Other role description:		
Trainee			
Start of Funding (mm/yyyy):			
10/2016			
End of Funding (mm/yyyy):			
09/2017			
	Save Cancel		

f. Click **Save and Exit**. Alternatively, if you want to add another funding source, click **Save and Add Another Source of Support** to be returned to the fund-ing search popup.

## **Publications**

List peer-reviewed publications and manuscripts accepted for publication in peerreviewed journals. For students/trainees, list all publications resulting from their period of training in the participating faculty member's laboratory or in association with the current training program, through completion of their degree. Do not list publications resulting from work done prior to entering the training program or arising from research initiated after the completion of the program.

Prior to adding publications, add the faculty to which the publications will be associated, using the Participating Faculty section. If faculty are not added prior, you cannot add publications and you get the following message "There are no Faculty Members added to the RTD, you must add the Faculty Member to the RTD in the Participating Faculty section, in order to add publications."

#### To indicate the trainee/student has no publications:

In the Publications section, click the checkbox titled *Check this box if there are no publications for this trainee*. **NOTE:** This button does not appear until you add faculty to the RTD using the Participating Faculty section.

The No Publications popup appears.

- 2. Select the Faculty Member and Reason for No Publications, and click Save.
- If you change your mind and want to add a publication, clear the checkbox and the Add Publication button reappears.

#### To add a publication by searching PubMed/PubMed Central:

In the Publications section, click the Add PubMed Publication button.
 NOTE: This button does not appear until you add faculty to the RTD using the Participating Faculty section.

The *Add Publication* popup appears, where you search for the publications to add or manually enter an article citation.

Search Publication on PubM	ed	
PubMed ID/PubMed Central ID		
e.g. 123456789,PMC1234567		
Enter one or more IDs, separated by com	nas.	
Author First Name	Author Last Name	Title
e.g. Jane	e.g. Doe	Enter a keyword

- 2. Enter search criteria using one of the methods below and click its **Search** button.
  - PubMed ID/PubMed Central ID: Enter IDs for articles listed in PubMed or PubMed Central. To search for multiple articles at once, enter a comma separated list of IDs, which can be from either PubMed or PubMed Central. Precede PubMed Central IDs with "PMC" as shown below. Examples:
    - a) Enter **PMC7679077** to search for a PubMed Central article (PMCID)
    - b) Enter **32226987** to search for a PubMed article (PMID)
    - c) Enter **PMC7679077, 32226987** to search for both articles at once
  - **Author First Name.** Enter all or a portion of the first name; articles with the text you enter here are found.
  - Author Last Name. Enter the *exact last name*; only exact matching last names are found.
  - **Title.**For publication title, enter one or more keywords; only those publications whose titles that contain all keywords are found.

The Publication Search Results appear, where you can add any number of publications by marking their checkboxes.

- 3. To add a publication from search results:
  - 1. Mark its **Include in RTD** checkbox.
  - 2. Choose from the **Faculty Member** drop-down. The faculty members listed are those in the Participating Faculty section of this RTD in XTRACT.
  - 3. Choose the current trainee/student that you are editing from the **Author** dropdown. The list of authors is pulled from PubMed/PubMed Central.
  - 4. Click Add Publication(s).
  - 5. To search again without saving, click the **Back to Search** button, enter new search criteria, and click the **Search** button again.

If you indicate a **Faculty Member**, an **Author**, or mark the checkbox of a publication, but omit the rest of the fields, then you will receive the warning on saving: *No publications were selected to report on the RTD*. This means that the publication won't be added due to insufficient information for the publication. Before saving, be sure to fill out all required fields for a publication record that you want to add.

## To add a publication by manually citing it:

Instead of searching for PubMed/PubMed Central publications, you can click the **Manual Edit Publication** button and manually enter all the necessary information to create a citation.

1. In the Publications section, click the **Add Publication Manually** button.

**NOTE:** This button does not appear until you add faculty to the RTD using the Participating Faculty section.

- 2. The Manually Add Publication popup appears.
- 3. In the Add Publication popup:
  - a. The information needed to define a citation is shown on the screen -- Title, Journal, Faculty Member, Volume, Inclusive Pages, Year, and Authors. Enter information for all fields that apply, being sure to enter information for the required fields that have a red asterisk.
  - b. You can enter multiple authors to compile a list of all authors of the publication. To add an author, enter the author's name in the **Authors** text box

and click the **Add New Author** button.

Repeat to add more authors. As authors are entered, the list of authors is displayed as shown below. Use the controls, which are described onscreen, to re-order the list. Select an author and click the **Highlight This Trainee** button to indicate which author is the trainee/student for whom this publication is cited:

- c. When finished entering the citation information, click the **Review** button, which gives you the opportunity to review the citation you entered.
- 4. Click **Add** to add the manual citation.

The publications you added appear in a table in the Publications section.

✓ Publications								
• Note: For any past participant who exited the program more than 10 years ago, that person's publication information will not appear in table 5 of the RTD.								
You cannot add a publication if its supervising Faculty member is not listed. Existing Faculty Added to the RTD:								
Curie, Marie								
If the supervising Faculty member is no	If the supervising Faculty member is not listed, add the Faculty Member first, then add a publication.							
□ There are no publications for this trainee.								
	+ Add Publication Manually + Add PubMed Publication							
Filter Table     Image: 2 Results								
Authors <sup>▲</sup>	Authors <sup>•</sup> Title <sup>‡</sup> PMID <sup>‡</sup> Faculty Member <sup>‡</sup>							
Curie Marie and Curie Pierre	Curie Marie and Curie Pierre ••• Long-Term Effects of Radium Curie, Marie Exposure on Nearby Inhabitants							

Click the **end** three-dot ellipsis button and select **Edit Publication** or **Delete Publication** to update or remove a publication.

# **Program Statistics (Renewal)**

The Program statistics information is accessed via the left-side menu.

**NOTE:** The screen varies between T34 (undergraduate training grant) and other types of training grants. T34s have only undergraduates, so field labels reflect undergraduates instead of doctoral trainees if you are working on a T34.

RTD+
Basic Information
Participating Departments / Programs
Training Support & Summary
Participating Faculty
Participating Trainees
Program Statistics
Applicants and Entra Program Statistics
Appointments
Preview PDF

In cases where a prior RTD exists for the application, the option to copy from the prior RTD(s) will display. If none are available, only the **Save** and **Clear** buttons will show.

The **Program Statistics** section is only available for training grants that have Predoctorate Trainees.

- 1. Enter the program statistics as follows:
  - Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D.
  - Average Time to Ph.D. for Trainees in the Last 10 Years (not including leaves of absence)
- 2. Select the Save Program Statistics button.

Use the checkbox to indicate that **Program Statistics are not applicable for this reporting period**.

# **Applicants and Entrants (Renewal)**

**NOTE:** T34 Undergraduate Training Grants lack the *Applicants and Entrants* section of the RTD.

To enter Pre-doc and Post-doc applicants and entrants, first enter the start year of the most recently completed academic year and click the **Submit** button.

Select the **Edit Pre-Doc Applicants and Entrants** and **Edit Post-Doc Applicants and Entrants** buttons to display and enter data for the specific academic year(s).

Prepare Research Training Dataset (RTD) for Renewal					
RTD 5T32ES123456-25 Long-Term Effects of Radium Exposure on Nearby Inhabitants	PD/PI Curie, Marie (Contact)				
Applicants and Entrants 😧					
Start year of the most recently completed academi	c year * ubmit				
The Pre-doc and Post-doc data may be edited via the links below, once the Start of the most recently completed academic year has been provided.					
Edit Pre-Doc Applicants and Entrants					
Edit Post-Doc Applicants and Entrants					

Figure 63: Applicants and Entrants

To change the most recently-completed academic year, change the year entered and select **Submit**. When changing **Academic** years, any data entered for **Applicant and Entrant Counts and Characteristics** are retained and associated with the shifted year based on order of years (rather than previously specified year).

For example, assume the first academic year is 2000-2001 and there is applicant/entrant data entered for that year. If the first academic year is changed to 2001-2002 by changing the most recently-completed academic year from 2001 to 2002, the same applicant/entrant data display for that first year.

# Predoctoral Applicant and Entrant Counts and Characteristics (Renewal)

## **Edit the Counts and Characteristics**

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

Prepare Re	Prepare Research Training Dataset (RTD) for Renewal					
	6-25 Long-Term Eff earby Inhabitants	fects of Radium	PD/PI Curie, N	Marie (Contact)		
2023 - 2024	2022 - 2023	2021 - 2022	2020 - 2021	2019 - 2020	Summary	
Predoctora	l Applicant ar	nd Entrant Co	ounts and Cha	aracteristics 🕃	>	
> Counts	: Department or I	Program			Open /	All Sections

Figure 64: Predoctoral Applicant and Entrants Counts and Characteristics

## **Counts table**

For Predoctoral Applicants and Entrants, Counts are entered by Participating Departments or Program. If a Department or Program is missing, refer to the topic titled Refer to *Participating Departments and Programs (Renewal)* on page 104. The following fields are provided for data entry on each department or program:

- Department or Program (read only)
- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support
- New Appointees to this Grant

## **Summary of Counts and Characteristics**

Select the **Summary** tab to display a summary for predoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.

To edit this information, refer to the above section of this topic.

## Postdoctoral Applicant and Entrant Counts and Characteristics (Rene-

#### wal)

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

**NOTE:** T34 Undergraduate Training Grants lack the *Applicants and Entrants* section of the RTD.

Prepare Research Training Dataset (RTD) for Renewal				
RTD 5T32ES123456-25 Long-Term Effects of Radium Exposure on Nearby Inhabitants	PD/PI Curie, Marie (Contact)			
2023 - 2024 2022 - 2023 2021 - 2022	2 2020 - 2021 2019 - 2020 Summary			
Postdoctoral Applicant and Entrant Counts and Characteristics 😧				
> Counts: Degree Types		Open All Sections		

Figure 65: Postdoctoral Applicant and Entrants Counts and Characteristics

## **Counts table**

For PhDs, MDs, dual-degree holders, and other degree holders, update the following information:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program

- New Entrants Eligible for Support
- New Appointees to this Grant

## **Summary of Counts and Characteristics**

Select the **Summary** tab to display a summary for postdoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.

To edit this information, refer to the above section of this topic.

# **Appointments (Renewal)**

Displays the training positions awarded and appointed, separately within two tables.

**NOTE:** The screen varies between T34 (undergraduate training grant) and other types of training grants. T34s have only undergraduates, so field labels reflect undergraduates instead of doctoral trainees if you are working on a T34.

RTD 5T32GM012345-41 Training Program for Andorian Antennae Cancer		PD/PI Shran, Thylek				
ppointments 😯 aining Positions Awarded						
	Budget Year 37	Budget Year 38	Budget Year 39	Budget Year 40	Sum of Budget Years	
Predoctoral Awarded	22	22	21	21	86	
Postdoctoral Awarded	0	0	0	0	0	
Short-Term Awarded	0	0	0	0	0	
	Budget Year 37	Budget Year 38	Budget Year 39	Budget Year 40	Sum of Budget Years	
Predoctoral Appointed	23	23	21	0	67	
Pre-doc Dual Degree	1	3	6	5	15	
Postdoctoral Appointed	4	1	1	2	8	
Post-doc MD or Equivalent	0	3	0	1	4	
Post-doc PhD or Equivalent	2	3	6	5	16	
Post-doc DDS, DVM, Other	1	2	2	4	9	
Post-doc Dual Degree	1	2	3	6	12	
	1	4	5	2	12	

Figure 66: Appointments

# **Training Positions Awarded**

The **Training Positions Awarded** table shows the number of awarded Predoctoral, Postdoctoral, and Short-Term appointments for each budget year. The last column of the table shows the sum of each appointment over all budget years.

This information is read-only.

# **Training Positions Appointed**

The **Training Positions Appointed** table shows the number of appointed training positions for each budget year. The last column of the table shows the sum of each appointment over all budget years. Training positions include:

- Predoctoral Appointed
- Predoc Dual Degree
- Predoc Underrepresented Groups
- Postdoctoral Appointed
- Postdoc MD or Equivalent
- Postdoc PhD or Equivalent
- Postdoc DDS, DVM, Other
- Postdoc Dual Degree
- Postdoc Underrepresented Groups
- Short-Term Appointed
- Short-Term Underrepresented Groups

Use the **Edit Appointments** button to open the table fields for editing. After updating the fields, select the **Save Appointments** button to save the information.

# **Preview PDF (Renewal)**

Select the **Preview PDF** link in the RTD pane on the left side of the screen to open save, and/or print the training tables. An *In Progress* watermark will be printed on the *Training Table* PDF until the RTD is finalized.

A copy of the RTD is downloaded to the browser's default location.

# Finalize RTD (Renewal)

Certain users have the ability to finalize the RTD for a training grant. Finalized RTDs are marked as *Final* and cannot be edited.

To finalize an RTD:

1. Select the **Finalize RTD** link from the **RTD** links on the left side of the screen.

A confirmation message warns: Are you sure you want to finalized this RTD? Once finalized, the RTD cannot be edited?

**IMPORTANT:** Once you finalize, the RTD cannot be edited. Select the **No** button if you do not wish to finalize.

2. Select the **Yes** button to finalize the RTD. A confirmation screen is displayed when the RTD has successfully finalized.

xTRACT generates a PDF version of the training tables without the *In Progress* watermark, updates the status of the RTD to *Final*, and locks the RTD for editing.

You will have the option to view the finalized PDF at any time on the *Search New RTDs* screen and unfinalize the RTD if needed.

New Applications	Search Research Training Data Sets for New Applications 🕑						
Search RTD for New Applications	New Data Set Identifier	New Data Set Project Title					
Initiate RTD for New Application		abcd% or %abcd% or ab% Use '%' as a wildcard character.	.cd%				
	PD/PI Last Name						
	abcd% or %abcd% or ab%cd%						
	Use % as a wildcard character. Clear Search Criteria Search New RTDs						
	RTDs of New Application	S					
	Filter Table 4	Results	▲ 🖪 < 1 of 1 > >				
	RTD ID A Status 🗘	Project Title 🌻	PD/PI Name ≑				
	12498 り inalized	Exploring the Effects of Long-Term Radiation Exposure in Nearby Inhabitants	Curie, Marie				

Click the hyperlinked RTD ID to view the PDF.

Click the Dufinalize New Application button to edit the RTD.

If data are needed to finalize the RPPR RTD, the appropriate error message(s) display as follows:

- Missing Required Data: Start Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.
- Missing Required Data: End Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.

All trainees must have a start date in the **In Training Data** section. Additionally, trainees with **No** selected for **In Training** status must have an end date.

# Prepare RTD for a Revision Application

To access the screen:

- 1. Search for the training grant on the *Search for Training Grants* screen. Refer to the topic titled Refer to *Search for Training Grants* on page 14 for steps.
- 2. Click the 📴 three-dot ellipsis button and select the appropriate link to access the

Prepare for Research Training Data Set (RTD) for Revision screen:

- To initiate the RTD for the renewal application: Select the **Prepare for Revi**sion link.
- To continue working on an initiated RTD: Select the Continue for Revision link.

The *Prepare Research Training Dataset (RTD) for Revision* screen opens for the selected training grant.

Use the links listed under **RTD** on the left side of the screen to maintain the specific sections of the RTD:

- Participating Departments/Programs
- Training Support & Summary
- Participating Faculty
- Participating Trainees
- Program Statistics
- Applicants and Entrants
- Appointments
- Preview PDF
- Finalize RTD

Selecting the links above opens the specific section of the RTD. From within, you can add, edit, and/or remove data.

# **Participating Departments and Programs (Revision)**

Use this section to add/remove partner organizations and departments and programs.

# Adding Partner Organizations

If you are working with another organization, you must add the organization before you can add participating departments and programs from that organization.

If you are not working with another organization, you should not add any partner organizations.

- 1. Select Participating Departments/Programs on the left.
- 2. In the **Partner Organizations** pane, click the **Add Partner Organization** button. The Add Partner Organization pane is displayed.
- 3. Click the **Organization** field and begin entering all or part of the organization's name. The dropdown filters to display a list of matches.
- 4. Select the appropriate organization.
- 5. Click the **Save** button. The organization is added to the Partner Organizations pane.
- 6. Repeat for any additional partner organizations.
- 7. To delete a partner organization, click its **Delete** button.

**IMPORTANT:** Deleting a partner organization will delete all data associated with the organization, including departments, programs, and characteristics and census totals.

# **Add Departments**

- 1. Select Participating Departments/Programs on the left.
- 2. Select the Add Participating Departments or Programs button.

Prepare Research Training Dataset (RTD) for Revision				
RTD 5T32ES123456-25 Long-Term Effects of Radium Exposure on Nearby Inhabitants	PD/PI Curie, Marie (Contact)			
Participating Departments and Programs	0			
Filter Table 0 Results				
Department or Program Name 🔺		Type 💠		
No data available in table				
		+ Add Participating Departments or Programs		

*Figure 67: Adding Departments* 

- 3. Start typing in the text box. The system will display a list of departments and programs with that character string in a drop-down menu.
- 4. Find the appropriate department in the results list drop-down and select the appropriate department. Major Components are also displayed with the Department to differentiate among departments with the same name in different units of the organization.

Add Participating Departments and Programs	×
Choose your Department or Program	
<ul> <li>✓ Include Departments</li> <li>✓ Include Programs</li> <li>▲ Department ● Program</li> </ul>	
Start typing to select departments or programs	
<b>1</b> Looking for a Program but don't see it listed? You can also <b><u>create one</u></b> .	
Need to make corrections to a name?	
<ul> <li>A Department: Please have a Signing Official contact the Service Desk.</li> <li>Program: Corrections can be made under the ••• menu once you add your selections.</li> </ul>	
Cancel	Save

Figure 68: Searching for Departments

Add Participating Departments and Programs	×
<ul> <li>Required field(s)</li> <li>Partner Organization</li> </ul>	
HARVARD SCHOOL OF PUBLIC HEALTH	
Select Department or Program *	
Include Departments	
🕑 Include Programs	
Department      Program	
pol	
Health Policy And Management	
Cancel	B Save

*Figure 69: Selecting the Department* 

5. Select the **Save** button and the department and close the screen.

The *Participating Departments and Programs* screen updates to show the added department(s) in a table. Added programs and departments display in the same table. The **Actions** column includes links for removing and editing the programs and departments.

# **Add Programs**

1. Select the Add Participating Departments or Programs button.

Prepare Research Trai	ning Dataset (RTD)	for Revision	
RTD 5T32ES123456-25 Long-Term Exposure on Nearby Inhabitant		PD/PI Curie, Marie (Contact)	
Participating Departm	nents and Programs	• •	
Filter Table	0 Results		
Department or Program I	Name 🕈		Type 🌩
		No data available in table	
			+ Add Participating Departments or Programs

Figure 70: Add Participating Departments or Programs Button

2. If you wish to add a department or program at a partner organization, click the

**Partner Organization** dropdown and select the appropriate organization. If you do not select a partner organization, the departments and programs listed will be for the applicant organization.

**NOTE:** If you are working with partner organizations, you must complete steps 4-7 to add departments or programs for each organization separately. Selecting a different organization before you save will remove the currently selected departments or programs.

- 3. Start typing in the text box. The system will display a list of programs with that character string in a drop-down menu.
- 4. Find the appropriate program in the results list drop-down and select the appropriate program.

The **Action** column updates to show Added for the added program. You can repeat the step to **Add Program** for as many programs as necessary.

To add a Program not available in the search results, select **Create One**. Add **Program Name** (required) and **Program Description** (optional) and select **Create Program and Select as Participating in my RTD**.

Add Participating Departments and Programs	×
Choose your Department or Program  ✓ Include Departments ✓ Include Programs  A Department ● Program	
Start typing to select departments or programs	
<b>1</b> Looking for a Program but don't see it listed? You can also <b><u>create one</u></b> .	
<ul> <li>Need to make corrections to a name?</li> <li>A Department: Please have a Signing Official contact the Service Desk.</li> <li>Program: Corrections can be made under the ••• menu once you add your selections.</li> </ul>	
Cancel	Save

*Figure 71: Searching for Programs Displaying Create One Hyperlink* 

Add Participating Departments and Programs	$\times$
Create Program, to be added to my list of participating programs on this RTD <b>?</b> * Required field(s) <b>Program Name *</b>	
Radiology	
Program Description	
250 Characters Remaining	le.
Cancel 🗲 Go Back 🖬 Save	e

Figure 72: Searching for Programs

- 5. Click the **Save** or the **Create Program and Select as Participating in my RTD** button to add the program and close the screen.
  - a. After clicking the **Create Program and Select as Participating in my RTD** button, click the subsequent **Save** button.

The *Participating Departments and Programs* screen updates to show the added program(s) in a table. Added programs and departments display in the same table. The **Actions** column includes links for removing and editing the programs and departments.

# **Edit Departments & Programs**

To edit a program or department, select the **Edit** button from the **Actions** column.

Participating Departments and Programs 😮	
Participating Programs and Departments have been successfully saved.	×
Filter Table 2 Results	▲ 🖽 < 1 of 1 × >
Department or Program Name 🔺	Type 🌩
Neurology/School Of Medicine	••• Department
Radiology	Edit Census

#### Figure 73: Edit Button for Programs and Departments

Update the Census information as necessary.

#### **Faculty**

- Total
- Participating

#### **Predoctorates**

- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

#### **Postdoctorates**

- Total
- Supported by any HHS Training Award
- Postdocs with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

#### **Undergraduates (replaces Predoctorates and Postdoctorates for T34s only)**

- Total
- TGE Undergrads Supported by this Training Grant

• Supported by any federal STEM Training Award

Faculty					
Total	Participating				
0	0				
Predoctorates					
			Eligible Pre-docs	TGE Pre-docs	
	Supported by any	With Participating	with Participating	Supported by this	
Total	HHS Training Award	Faculty	Faculty	Training Grant	
0	0	0	0	0	
Postdoctorates					
			Eligible Post-docs	TGE Post-docs	
	Supported by any	With Participating	with Participating	Supported by this	
Total	HHS Training Award	Faculty	Faculty	Training Grant	
0	0	0	0	0	

Select the Save and Close button to save the information.

## **Participating Department/Program Detail (Revision)**

### **Edit Departments & Programs**

To edit a program or department, select the **Edit** button from the **Actions** column.



Figure 74: Edit Button for Programs and Departments

Update the Census information as necessary.

## **Faculty**

- Total
- Participating

### **Predoctorates**

- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

### **Postdoctorates**

- Total
- Supported by any HHS Training Award
- Postdocs with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

### **Undergraduates (replaces Predoctorates and Postdoctorates for T34s only)**

- Total
- TGE Undergrads Supported by this Training Grant
- Supported by any federal STEM Training Award

Participating Department	Census: Neurology/Schoo	ol Of Medicine 😮			×
Faculty Total	Participating 0				
Predoctorates Total	Supported by any HHS Training Award 0	With Participating Faculty 0	Eligible Pre-docs with Participating Faculty 0	TGE Pre-docs Supported by this Training Grant 0	
Postdoctorates	Supported by any HHS Training Award	With Participating Faculty	Eligible Post-docs with Participating Faculty	TGE Post-docs Supported by this Training Grant	
0	0	0	0	0	Cancel Save

Select the **Save and Close** button to save the information.

# **Training Support & Summary (Revision)**

## **Summary Statistics**

Displays the read-only totals of the following:

- Total Number of Predoc Positions
- Total Number of Postdoc Positions
- Total Number of Short-Term Positions
- Average Grant Support per Participating Faculty Member

The **Average Grant Support per Participating Faculty Member** is the mean of the Current Year Direct Costs in Research Support for each Faculty member.

The total number of positions represent the sums of the positions entered for each Institution Training Grant.

✓ Summary Statistics	
Total Number of Pre-doc Positions 🚯	0
Total Number of Post-doc Positions 🚯	0
Total Number of Short-Term Positions ()	0
Average Grant Support per Participating Faculty Member 🕕	\$0

Figure 75: Training Support & Summary

# **Institutional Training Support**

To add currently active, federal institutional training, career development, or research education support available to the participating faculty members:

1. Select the **Add Institutional Training Support** button in the **Institutional Training Support Detail** section.

$\checkmark$ Institutional Traini	ng Support Detail			
NIH and Other Ag	gency Sources of Support on Reco	rd		
Filter Table	1 Results		4	< 1 of 1 ~ >
Grant Title 🔺		Award Number ≑	Project Period 🗘	PD/PI ≑
Long-Term Effects of R	adium Exposure on Nearby Inhabitants	T32AA00 -26	04/1997 to 03/2028	Curie, Marie
			+	Add Institutional Training Support
			+ /	Add Institutional Training Suppo

Figure 76: Add Institutional Training Support Button

- 2. Search for support by entering any of the criteria on the *Add Institutional Training Support* pop-up. You must enter either an IC Code or PD/PI Last Name.
  - Activity Code
  - IC Code
  - Serial Number
  - Suffix Code
  - Start Date
  - End Date
  - PD/PI Last Name

• Institution

**TIP:** As you type an institution name, a drop-down list of potential matches will begin to populate. Select the institution from that list.

3. Select the Search Funding Sources button.

Add Institutional Training S	upport		×
Search NIH Fun * Either IC Code or PD/PI Last I	-		
Activity Code	IC Code *	Serial Number	Suffix Code
Start Date	End Date	PD/PI Last Name *	
mm/dd/yyyy	mm/dd/yyyy		
Institution			
Select One			~
			Close <b>Q</b> Search Funding Sources

4. From the result list, click the **Select** link from the **Action** column for the correct project.

Figure 77: Searching for Funding Sources

The added source of support will display on the Training Support and Summary screen.

Click the hyperlinked grant title to edit it.

Click the **Remove Institutional Training Support** button to remove the funding source.

Additional detail can be found in the Institutional Training Support Detail section.

# **Census Totals**

Displays totals for Faculty, Predoctorates, and Postdoctorates.

## **Faculty**

- Total
- Participating

Use the **Edit** button to add to or update the numbers for unique faculty members across participating departments and interdepartmental programs.

### <u>Predoc</u>

The following read-only information is displayed. This data is maintained on the **Par-ticipating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Predoctorates with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

#### **Postdoc**

The following read-only information is displayed. This data is maintained on the **Par-ticipating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Postdoctorates with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

# Institutional Training Support Detail (Revision)

Click the hyperlinked grant title on the **Institutional Training Support** section of the *Training Support & Summary* to open the *Editing* screen.

Prepare Research Training Dataset (RTD)	for Revision	
RTD 5T32ES123456-25 Long-Term Effects of Radium Exposure on Nearby Inhabitants	PD/PI Curie, Marie (Contact)	
Institutional Training Support Detail 😧		
Project Title: Long-Term Effects of Radi	um Exposure on Nearby Inhabitants	
Grant Number: R01ES0001		
✓ Number of Trainee Positions		
Number of Pre-doc Positions	0	
Number of Post-doc Positions	0	
Number of Short-Term Positions	0	
Number of Participating Faculty	0	Edit
✓ Overlapping Faculty		
Filter Table 0 Results		
Overlapping Faculty Name		
	No data available in table	
		Add Overlapping Faculty

Figure 78: Institutional Training Support Detail

### **Number of Trainee Positions**

Use this section to add the number of Predoc, Postdoc, Short-term, and Participating Faculty positions.

- 1. Select the **Edit** button.
- 2. In the Institutional Training Support pop up, enter the appropriate totals.
- 3. Click the **Save** button.

### **Overlapping Faculty**

Use this section to update the number of overlapping faculty.

1. Select the **Add Overlapping Faculty** button.

✓ Overlapping Facu	ity	
Filter Table	0 Results	
Overlapping Facult		ta available in table
		Add Overlapping Faculty

Figure 79: Add Overlapping Faculty Button

- 2. Click the Add Overlapping Faculty button for any participating faculty members that are also on the Institution Training Grant. If a needed faculty member does not display in the results, then add the faculty member as Participating Faculty as described in the topic titled Refer to *How Do I Manage Participating Faculty Members (Revision)?* on page 196 for revision applications.
- 3. Select the **Close** button.

The Overlapping Faculty Name displays on the *Institutional Training Support Detail* screen with the option to **Remove** the overlapping faculty member. The updated total count of the overlapping faculty is calculated by system and is displayed as read-only.

# How Do I Manage Participating Faculty Members (Revision)?

Select the *Participating Faculty* link from the **RTD** menu on the left of the screen. This will open the *Participating Faculty Members* table and display the participating faculty added to the RTD - or a message indicating that no faculty have been added, when appropriate.

ew Applications -						
earch RTD for New oplications	New RTD	New RTD 419 The Effects of Romulan Ale on Senior Staff				
tiate RTD for New oplication	PD/PI	Shorts, Jim				
Ъ <b>-</b>	Participating F	aculty Members 👩				
asic Information						
articipating epartments / ograms	Add Faculty				Showing 1 - 7 of tota	
aining Support & Immary	Person Name	Commons User ID	Person ID	Email	Action	
inticipating Faculty	White, Snow	WHITESNOW	1234567	eRATest@mail.nih.gov	Edit Remove	
	White, Grumpy	WHITEGRUMPY	2345678	eRATest@mail.nih.gov	Edit Remove	
rticipating Students	White, Doc	WHITEDOC	3456789	eRATest@mail.nih.gov	Edit Remove	
plicants and Entrants	White, Sleepy	WHITESLEEPY	4567890	eRATest@mail.nih.gov	Edit Remove	
	White, Happy	WHITEHAPPY	5678901	eRATest@mail.nih.gov	Edit Remove	
eview PDF						

Figure 80: Participating Faculty Members

# How Do I Add Faculty?

**TIP:** Faculty may be added individually or via a Bulk Upload.

# How Do I Add Faculty?

**TIP:** Faculty may be added individually or via a Bulk Upload.

### How Do I Add Faculty Individually?

- Select the Add Faculty button.
  - 1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution**.

**NOTE:** You must enter a Commons User ID, Person ID, or Last Name to perform a search.

2. Select the **Search Persons** button.

Search for Faculty			×
e 🖬 Search Criteria			
* Either Commons User ID or Person ID * Commons User ID	or Last Name is required to perform person search.		
First Name 2	Middle Name	* Last Name Shorts%	
Search for persons who have a Com	mons affiliation with my institution		
For example: abcd% or %abcd% or ab%c	mmons ID or Last Name, by using the "%" character d%.		
Search Persons Clear			
3	J		Close

#### Figure 81: Search for Faculty

 All matching records display in the Person(s) table. Select the Add to RTD check box for the person you wish to add, then click the Add Person(s) button. The person is added to the Participating Faculty Members list.

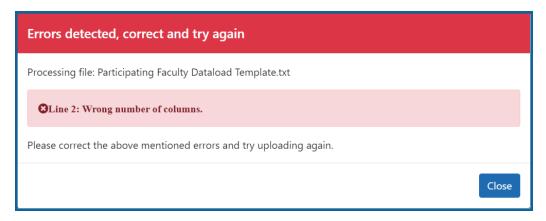
### How Do I Add Faculty Via a Bulk Upload?

- Select the **Upload Participating Faculty** button below the table.
  - The next screen will display the RTD and PD/PI information in the top section. The bottom section, under "Upload Participating Faculty ", contains notes regarding how to perform a bulk upload. Click the **Show More** link for instructions on creating and formatting a tab-delimited file, as well as a link to download a tab-separated (TSV) text template file (.txt). Use these tools to create the upload file.

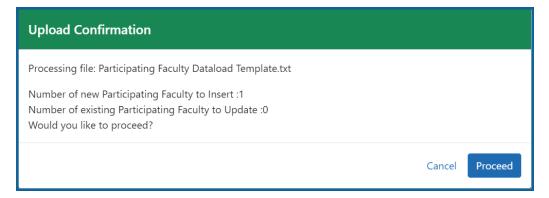
Prepare Re	esearch Training Dataset (RTD) for Revision
RTD	5T32DK123456-15 Gene therapy training: CF and genetic diseases
PD/PI	L'amour, Louis
Upload F	aculty Members
<ul> <li>The file how to d</li> <li>Includin</li> <li>The tab- Training and Rel Careers</li> <li>The Cor</li> <li>If the sa</li> <li>If it is pr Profess</li> <li>If it is pr</li> <li>If they ai Predocs</li> <li>Continu accepte</li> <li>If it is pr for Exect</li> <li>Faculty update fi</li> <li>The dat</li> <li>If the up will only</li> </ul>	mmons User Id is required for each uploaded faculty member. The other columns may be left blank, as appropriate. me Commons ID is provided for multiple entries in the upload file, an error will be reported. ovided, the Rank must be one of the following (without quotations): "ASTP" for Assistant Professor. "ASSP" for Associate or. "PROF" for Professor. "REAP" for Research Assistant Professor. "INST" for Instructor. ovided, the Research Interest must be 240 characters or less. re provided, each of the component values of the mentoring record fields (Predocs in Training, Predocs Graduated, s Continued in Research and Related Careers, Postdocs in Training, Postdocs Completed Training, Postdocs ed in Research and Related Careers) must be a whole positive number (or zero). No fractional portions can be

- 2. Once the upload file has been prepared, use the **browse** link to select and upload the file.
- 3. If there are any errors in the upload file, a message will appear above the filename with a link to details of the errors. These errors will need to be cor-

rected before the upload will succeed.



4. If the upload is accepted, a confirmation message will display. The name of the upload file will display in the field above the **Browse** button.



Click the **Proceed** button. The values from the uploaded document will be updated in the appropriate *Participating Faculty Detail* tables as well. (Rank, Research Interest, Training Roles, Predocs in Training, Predocs Graduated, Predocs Continued in Research and Related Careers, Postdocs in Training, Postdocs Completed Training, and Postdocs Continued in Research and Related Careers)

5. To validate that the table and the details updated correctly, click on the *Participating Faculty* link again in the left-side menu.

## How Do I Edit Faculty Members?

Click the hyperlinked faculty member name to edit the participating faculty details for the selected member. Refer to the topic titled Refer to *Participating Faculty Detail (New* 

Application) on page 43.

# How Do I Remove a Faculty Member?

Select the **Remove Participating Faculty** button to remove the faculty member from the RTD. At the confirmation, select **Delete**.

# **Participating Faculty Detail (Revision)**

Use the **Expand** button next to each section of the *Participating Faculty Detail* to display it. The **Open All Sections** link reveals all collapsed sections at once.

Prepare Research Training Dataset (RTD)	) for Revision		
RTD 5T32ES123456-25 Long-Term Effects of Radium Exposure on Nearby Inhabitants	PD/PI Curie, Marie (Contact)		
Participating Faculty Details 😯			
Curie, Pierre			
Commons User ID PIERRECURIE	Email eratest@nih.gov	<b>Rank</b> None	
Primary Department or Program	Research Interest	Training Role(s)	
ivone	моле	None	🕑 Edit
			Open All Sections
> Faculty Degree			
> Research Support			
> Mentoring Record			

Figure 82: Participating Faculty Details

Each section provides a means for editing the information. Refer to the steps below.

# **Participating Faculty Details**

The **Participating Faculty Details** panel of the *Participating Faculty Detail* displays faculty data as described below.

- Commons User ID (read only)
- Email (read only)
- Rank
- Primary Department or Program
- Research Interest
- Training Role(s)

To edit faculty member data:

1. Click the **Edit** button to open the *Edit Faculty Member Data* window:

Edit Faculty Member Data	×
* Required Field	<b>^</b>
Active Faculty in Program	
Rank *	
<ul> <li>Applicant Organization (UNIV OF NORTH CAROLINA CHAPEL HILL)</li> <li>Partner Organization(s)</li> </ul>	
Primary Department or Program	
Select Program department or program	
<ul> <li>Looking for a Program but don't see it listed? Navigate to the Departments and Program's tab to Create a Program.</li> <li>Research Interest</li> </ul>	
enter text	
200 characters remaining	
Training Role	
D/PI	
Preceptor	
Executive Committee member (Exec. Comm.)	
Other Committee member (Other Comm.)	
Other	
Cancel S	ave

 If the faculty member is no longer active in the organization, clear the Active Faculty in Program checkbox. 3. Select an academic rank from the **Rank** drop-down list, or, if the faculty member does not have an academic rank, select **Other** from the **Rank** drop-down, and type the position title in the **Other Rank Title** field.

This lets you provide more accurate position information about grant faculty who hold non-academic positions, such as in government or the private sector. The **Other Rank** field is enabled only if you select **Other** in the **Rank** drop-down list.

- 4. Select the appropriate radio button for the faculty member's organization.
  - a. If you select the **Partner Organization(s)** radio button, the Partner Organization dropdown is displayed. Select the appropriate organization.
  - b. If you do not select the **Partner Organization(s)** radio button, the departments and programs displayed will be for the applicant organization.
- 5. In **Primary Department or Program**, specify a department or program for the faculty member. Type a few letters to see matches from the faculty member's institution. Matches are based on programs previously entered into xTRACT or other eRA modules.

**NOTE:** If you select a partner organization and the desired program or department is not listed, contact the organization's signing official to have them create it.

- 6. Enter the faculty member's area of focus in the **Research Interest** field.
- 7. Select the **Training Role** the faculty member holds for the grant currently being edited. Preceptor is also sometimes referred to as mentor.
- 8. Click the **Save** button.

## **Faculty Degree**

From this panel, you may add a degree, edit a degree, or select a degree to add to an RTD.

1. Click the **Expand** button to view the panel.

Filter Table	3 Results			🕹 🖪	■ < 1 of 1 × 3
Degree 🔺	Institution ≑	Date Degree Received 🗘	Status ≑	Include in RTD 💠	Source ≑
DOCTOR OF PHILOSOPHY			Completed		Commons Profile
REGISTERED NURSE			Completed		Commons Profile
MASTER OF SCIENCE			Completed		Commons Profile

The **Source** of degrees is displayed as read-only and as either *xTRACT* (meaning that the degree was added to the person profile in xTRACT) or *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

### Add a Degree

- 1. Select the **Add Degree** button.
- 2. Update the fields in the *Add a Degree* pop-up:
  - **Degree**: Select from the list
  - **Other Degree Text**: Enter if the Degree selected is *OTH (other type of degree)* or another category like *BOTH*, *DDOT*, *DOTH*, *MDOT*, *MOTH*, and *VDOT*.
  - **Degree Date**: Enter in MM/YYYY format
  - **Terminal Degree**: Select the **Yes** or **No** radio button as appropriate. When the **Yes** button is selected, the terminal degree indicator (This is the terminal degree of this person.) displays next to the degree details in the view. Only one degree for a person can be set as the Terminal Degree.
  - **Degree Status**: *Completed* or *In Progress* are the selections available for Faculty degrees.
  - Include in RTD: Yes or No are the options available.
  - **Degree Institution**: Enter the institution name, one institution per degree. Start typing in some of the institution's name and a drop-down menu displays with related institution names.
- 3. Select the **Save** button to save your changes.
- 4. Repeat for any additional degrees.

### Edit a Degree

- 1. Click the hyperlinked degree name to display the *Edit Degree* screen for editing.
- 2. Update the fields as necessary.
- 3. Select the **Save** button or click the **Cancel** button.

### Include in RTD

- 1. Locate the degree you are including in the RTD.
- Check the Include in RTD box for the degree to be displayed in the Participating Faculty Members Training Table on the RTD PDF.

Uncheck the box to exclude the degree.

### Delete a Degree

Select the **Remove Degree** button to delete the degree from the participating faculty detail. Remove Degree is not available if the **Source** of the degree is *Commons Profile*, meaning the degree is from the Commons Personal Profile of the person.

## **Research Support**

This section, under Participating Faculty, details the sources of support for the participating faculty member who is currently being edited.

1. Click the **Expand** button to view the panel.

	Agency 30	urces of Support o	n Record				
Filter Table 1 Results						盘 🔳	< 1 of 1 ~ >
		Role on Projec or	t			Ducin et Ducie d	Current Year Direct Costs ≑
Grant 🕈		Subproject 🌻	Projec	ct Title 🌻		Project Period 🗘	Direct Costs 🖤
Grant   P50AA030407-1  Dther Sources of		Subproject \$	-	c <b>t Title 🗢</b> oject : adsf		02/2023 to 01/2028	\$500,000
P50AA030407-I			-			02/2023 to 01/2028	\$500,00
P50AA030407- Dther Sources o		Project Lead	Subpro		Project Title ≑	02/2023 to 01/2028 + Add Project Lea	\$500,00 Id Source of Support

#### NIH and Other Agency Sources of Support on Record

Use this section to report currently-funded, active NIH or other Agency grants on which this faculty member is working. This list might be automatically populated with records if the faculty member is on record as being funded from NIH and other grants.gov systems. Records that are automatically populated lack an Edit or Remove button and thus are read-only.

Use the **Add Project Lead Source of Support** button to search for other NIH or Agency grants that contain sources of support. If the faculty member is reported on an RPPR, then those grants will be displayed as suggested sources of funding, but you can also find and choose grants outside of that suggested list. Grants not currently funded cannot be added.

To add another source of funding for the current faculty member:

- Under NIH and Other Agency Sources of Support on Record, click the Add Project Lead Source of Support button.
- In the Add Source of Support search window, enter criteria to find grants in which the current participating faculty member is funded.
   Note that this window might contain a list of suggested grants to choose

from before you perform your search. If the faculty member is reported on an RPPR (Research Performance Progress Report) for a component, then those grants will be displayed as suggested sources of funding. You can select suggested sources of funding, or you can find and choose grants outside of that suggested list.

- Enter search criteria in the Add Source of Support window and click the Search button.
- 4. In the search results, click the **Eselect the Funding Source** button for one or more grants that include funding for the current participating faculty member.
- 5. For the selected grant, enter details for the funding source, specifically the subproject the faculty member is working on, and the funding for that subproject.

Add Source of Support				×
Enter Source of Support Details				
* Required Field				
Funding Source: P50ES123456-07				
Role during funding: *				
Project Lead				
Subproject Title <b>*</b>				
Project Start Date:				
12/2017				
Project End Date: 11/2027				
Current Year Direct Costs: *				
c	lancel	← Back	Save and Add Another Source of Support	Save and Exit

 Click Save and Add Another Source of Support to find more sources of support, or click Save and Exit if finished with NIH sources of support for this faculty member.

- 7. To edit the source of support, click the hyperlinked grant number.
- 8. To delete the source of support, click the **Remove Non-NIH Source of Support** button.

### **Other Sources of Support**

Includes Funding Source, Support Type, Project Number, Project Role, Project Title, Project Period, and Current Year Direct Costs.

To add additional support:

- Select the Add Another Source of Support button to display fields for searching/editing to add a non-NIH funding source.
- 2. Search for a funding source:
  - a. Search for support entering the parameters given and selecting Search
     Funding Sources button.
  - b. In the search results, click the **Ending Source** button for the correct project.
- 3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
- 4. Enter current year direct costs.
- Click Save and Add Another Source of Support to find more sources of support, or click Save and Exit if finished with NIH sources of support for this faculty member.
- 6. To edit the source of support, click the hyperlinked grant number.
- 7. To delete the source of support, click the **Remove Non-NIH Source of Support** button.

## **Mentoring Record**

Click the  $\triangleright$ **Expand** button to view the panel.

Pre-docs in Training	3	
Pre-docs Graduated	12	
Pre-docs Continued in Research or Related Careers	12	
Post-docs in Training	5	
Post-docs Completed Training	7	
Post-docs Continued in Research or Related Careers	7	

The **Mentoring Record** panel of the *Participating Faculty Detail* to display counts of trainees mentored.

- Pre-docs In Training
- Pre-docs Graduated
- Pre-docs Continued in Research or Related Careers
- Post-docs in Training
- Post-docs Completed Training
- Post-docs Continued in Research or Related Careers

Use the **Edit** button to open the fields in a pop-up for editing. Save your changes by selecting the **Save** button on the pop-up.

# **Students (Revision)**

This section displays the students added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove students.

RTD T32ES123456-25 Long-Te xposure on Nearby Inhabit		PD/PI Curie, Marie (Contact)		
Participating Stude	nts 😮			
Filter Table	2 Results			★ ■ < 1 of 1 × >
Person Name 🔺	Commo	ons User ID ≑	Person ID 🌲	Student Type 🌲
Curie, Marie	T MARIEC	URIE	140133387	Post-doc
Curie, Pierre	PIERREC	CURIE	140133388	Post-doc

### Figure 83: Students

Students(s) are listed in a table at the bottom of the screen along with the following information:

- Student Name
- Commons User ID (if available)
- Person ID
- **Student Type**: Pre-doc or Post-doc
- Actions
  - The **Edit** link opens the *Student Detail* for the selected trainee. Refer to the topic titled Refer to *Student Detail (Revision)* on page 212.
  - The **Remove** link removes the person from the RTD.

The **Add Student** feature allows you to search for and add students or create new xTRACT persons to add to the RTD.

# Add Student

To add a student:

1. Select the **Add Student** button.

Search for Students		×
Search Criteria      * At least one marked field is required to per	form person search.	
Commons User ID *	Person ID *	
abcd% or %abcd% or ab%cd%		
You can perform a wildcard search on Common	is User ID.	
First Name	Middle Name	Last Name *
		abcd% or %abcd% or ab%cd%
		You can perform a wildcard search on Last name.
Search for persons who have a Common Search f	ons affiliation with my institution	
		Cancel <b>Q</b> Search Persons

1. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look

outside of your institution by removing the checkmark from the box titled **Search** 

for persons who have a Commons affiliation with my institution.

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

All matching records display in the **Person(s)** table. Click the **Add Student** as drop-down in the **Add to RTD** column and select the appropriate option to add
 the person.

**NOTE:** After you perform a search, the **Create a new xTRACT Person here** link is enabled. Use this link to create an xTRACT person record. Refer to the topic titled Refer to *Create xTRACT Person* on page 264

3. Click the **Add Person(s)** button.

# **Edit Student**

From the list of students, click the hyperlinked student name to edit the student detail.

Refer to the topic titled Refer to Student Detail (Revision) on page 212.

# Remove

Select the **Remove Student** button to remove the student from the RTD. At the confirmation, select **Yes**.

# **Student Detail (Revision)**

Use the **Expand** button next to each section of the *Participating Student Detail* to display it. The **Open All Sections** link reveals all collapsed sections at once.

Prepare Research	Training Dataset (RTD)	for Revision		
RTD 5T32ES123456-25 Long Exposure on Nearby Inha	-Term Effects of Radium abitants	PD/PI Curie, Marie (Contact)		
Participating Stud	ent Details 😯			
Curie, Pierre Post-	Doc			
Commons User ID PIERRECURIE	<b>Email</b> eratest@nih.gov	In Training?	Start Date into Postdoctoral Research 🕄 None	End Date 🕄 None
Research Topic None				🗹 Edit
				Open All Sections
> Faculty Members				
> Degrees				
> Post-Training Posit	ions			
> Subsequent Grants	;			
> Publications				1

#### Figure 84: Student Detail (Revision)

Each section provides a means for viewing or editing the information. Refer to the steps below.

### **Student Data**

Use the **Expand** button next to each section of the *Participating Student Detail* to display it. The **Open All Sections** link reveals all collapsed sections at once.

H	ome Admin Institution Profile	Personal Profile	Status ASSIS	T Prior Approval	RPPR	xTrain	XTRACT	Admin Supp	eRA Partners	Non-Research
хΤ	RACT Info New Applications	Training Grants Pe	sons Institut	ion Data						
	Training Grants	Prepare Resea	rch Training D	ataset (RTD) for I	Revision					
1		RTD	41	32HL123456-10	Dynami	c Effect	s of Waki	ing Sleeping [	Dogs	
	RTD+	PD/PI	M	cManus, Patrick						
	Basic Information	Participating Tra	ainee Detail (	0						
	Participating Departments / Programs	Quagmire, Fent	on (Pre-doc)	)						[+ Open All Sections ]
	Training Support &	Student Dat	a							
	Summary	O In Training D	ata							
	Participating Faculty	Faculty Members								
	Participating Trainees		<b>-</b> · · ·							
	Program Statistics	<ul> <li>Support Duri</li> </ul>	ng Training							
	Applicants and Entrants	O Degrees								
	Appointments	O Post-Training	) Positions							
	Preview PDF	Subsequent	Grants							
		Publications								

Prepare Research	Training Dataset (RTD)	for Revision		
RTD 5T32ES123456-25 Long Exposure on Nearby Inha	-Term Effects of Radium abitants	PD/PI Curie, Marie (Contact)		
Participating Stude	ent Details 😯			
Curie, Pierre Post-	Doc			
Commons User ID PIERRECURIE	<b>Email</b> eratest@nih.gov	In Training?	Start Date into Postdoctoral Research 🕄 None	End Date 1 None
Research Topic None				<b>∠</b> * Edit
				Open All Sections
> Faculty Members				
> Degrees				
> Post-Training Positi	ions			
> Subsequent Grants				
> Publications				1

Figure 85: Participating Student Details

Each section provides a means for viewing or editing the information. Refer to the steps below.

### **Participating Student Details**

The **Participating Student Details** panel displays the following read-only information:

- Commons User ID or Person ID
- Email
- In Training?
- Start Date
- End Date
- Research Topic

Use the **Edit** button to open the fields in a pop-up for editing.

- In Training
- Type
- Research Topic
- Start Date
  - Into Current Degree-Granting Program, for a Predoctoral trainee
  - Into Postdoctoral Research, for Postdoctoral trainee
- End Date (when Trainee Left Program)

### **Faculty Members**

1. Click the **Expand** button for the Faculty Members panel to display the faculty members for the student on the RTD.

✓ Faculty Members		
-		<b>_</b> +
Curie, Marie	Ť	Add Faculty

2. To add faculty, select the **Add Faculty** button.

**NOTE:** Up to two faculty members may be associated with a student. If there already two faculty members already listed, then the **Add Faculty Member** button does not display. To change a faculty member, delete the appropriate one first and then add the new one.

3. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons** who have a Commons affiliation with my institution.

**NOTE:** You must enter a Commons ID, Person ID, or Last Name to perform a search.

4. Select the **Search Persons** button.

Search for Faculty			×
Search Criteria			
Either Commons User ID or Person ID or     Commons User ID	r Last Name is required to perform person search. * Person ID		
First Name 2	Middle Name	* Last Name Shorts%	
Search for persons who have a Comm	nons affiliation with my institution		
For example: abcd% or %abcd% or ab%cd Search Persons Clear			
	)		
3	J		Close

Figure 86: Search Faculty Member

- 5. All matching records display in the **Person(s)** table. Select the **Add to RTD** check box to add the person to the list of faculty for this student.
- 6. Click the **Add Person(s)** button. The faculty member is added to the student details.
- 7. Search for and add other faculty as necessary, repeating the steps above.

**TIP:** Once two faculty members are added, the ability to add more is disabled.

8. To remove a faculty member from the Student, select the **Remove Faculty Member** button for the faculty member.

## Degrees

1. Click the **Expand** button for the Degrees panel to display a list of completed degrees and associated data.

Filter Table 1 Results 1 of 1					
Degree <sup>▲</sup>	Institution ≑	Date Degree Received ≑	Status ≑	Received in Training 🗘	Source ≑
	University Of Paris Faculty Of Medicine	05/2015	Completed		xTRACT

The **Source** of degrees is displayed as *xTRACT* (meaning that the degree was added or edited to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

### To add a degree:

- 1. Select the **Add Degree** button.
- 2. Update the fields in the *Create a New Degree* pop-up:
  - Degree: Select from the list
  - **Other Degree Text**: Enter if Degree selected is *OTH (other type of degree)* or another category like BOTH, DDOT, DOTH, MDOT, MOTH, and VDOT.
  - **Degree Date**: Enter in MM/YYYY format
  - **Terminal Degree**: Select the **Yes** or **No**. When **Yes** is selected, the terminal degree indicator (This is the terminal degree of this person.) displays next to the degree details in the view. Only one degree per person can be set as the Terminal Degree.
  - Degree Status: Select Completed or In Progress, as appropriate
  - **Received in Training**: Select Yes or No. Up to three degrees can be selected as Received in Training.

- **Degree Institution**: Enter the institution name, one institution per degree. Start typing in part of the institution's name and a drop-down menu displays with related institution names. Select the institution name from that menu. If the desired institution name does not appear, a link is provided at the bottom of the drop-down menu that will accept the name of the institution as typed in.
- 3. Select the **Save** button to save the new degree.
- 4. Repeat for any additional degrees.
- 5. To edit a degree, click the hyperlinked degree name.
- 6. To delete a degree, click the **ERemove Degree** button for the degree. Degrees with *Commons Profile* as a **Source** cannot be deleted.

## **Post-Training Positions**

1. Click the **Expand** button for the Post-Training Positions panel to display post-training position information.

Filter Table	1 Results			📩 田 < 1 of 1 🗸	
Position (Type) 🔺	Institution \$	Department ≑	Start Date - End Date 🌲	Principal Activity 🗘	Source ≑
Principal Research Scientist <b>T</b> Primary Current Position	University Of Paris Faculty Of Medicine		05/2015 -	Primarily Research	xTRACT

The **Source** of positions is displayed as *xTRACT* (meaning the position was added or updated for the person in xTRACT) or as *Commons Profile* (meaning the position is from the Commons Personal Profile of the person).

### To add a position:

- 1. Click the **Add Position** button.
- 2. Provide the following information:
  - **Workforce Sector**: Choose the area of employment: Academia, Government, For-Profit, Nonprofit, Other.
  - **Principal Activity**: Primarily Research, Primarily Teaching, Primarily Clinical, Research-Related, Further Training, or Unrelated to Research.
  - **Position**: Type the title of the position.
  - **Start Date**: Type the month/year the position started.
  - **End Date**: Type the month/year the position ended, or leave blank if employed to present time.
  - **Primary Employment Indicator**: Select **Yes** if this is the main employment; otherwise, select **No**.
  - Full Time Employment Indicator: Select Full-Time or Part-Time
  - **Current/Initial Employment Indicator**: Select **Primary Initial** if this is the initial employment for the trainee, or select **Primary Current** if it is the current employment.
  - **Institution**: Enter the institution or start typing to see matches to your typed text.
  - **Primary Department of Position**: Enter the department or start typing to see matches to your typed text. Matches for the selected Institution are shown.
- 3. Select the **Save** button to save the changes.
- 4. Repeat to add additional positions.
- 5. To edit a position, click the hyperlinked position name.
- 6. To delete a position, click the **Delete this employment** button for the position. Positions with *Commons Profile* as a **Source** cannot be deleted.

# **Subsequent Grants**

1. Click the **Expand** button for the Subsequent Grants panel to display subsequent fellowship, career development, or research grant support obtained from any source after the individual completed training.

• You may include up to 5 sources of support in RTD. Subsequent support can only be reported for PD/PI, Staff Scientist, Faculty or Co-Investigator roles.							les.	
- ,		'					5	
Filter Table		2 Resul	ts			* F		of 1 🗸 👔
Type of Support 🔺		Source of Support ≑	Project Number ≑	Project Title 🌲	Project Role ≑	Year of Support 🜲	Source ≑	Include in RTD
		NIH	R01ES123456	Long-Term Effects of Radium Exposure	Co-	06/2015 to 05/2025	XTRACT	
Grant				on Nearby Inhabitants	Investigator	00,2010 10 00,2025	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
Research		National Science	IIS-1234567	X-Ray Crystallography and the Molecular	Co-	05/2020 to 04/2025	XTRACT	
Grant		Foundation		Structure of DNA	Investigator			

Sources of support submitted on the RTD should list the trainee/student in a role such as PD/PI, co-investigator, faculty collaborator, or staff scientist.

**NOTE:** xTRACT prepopulates NIH subsequent grant support from xTrain trainee data when available. You cannot delete prepopulated support records from the Subsequent Grants table.

Under *NIH and Other Agency Sources of Support on Record*, indicate up to five subsequent sources of support to include in the RTD. Each button lets you add a different type of support:

**Add Source of Support** button: Add grant support received from NIH and other Agency sources that are on record. If you do not know the specific grant, you can indicate support by entering only the activity code and IC.

**Add Other Source of Support** button: Add sources of grant support received from non-NIH/Agency sources.

- 2. To edit a source of support, click the hyperlinked grant name to edit it.
- 3. To delete a source of support, click the **Remove Source of Support** button.
- 4. Mark up to five **Include in RTD** checkboxes to specify which sources of support will be included in the RTD, which allows only five sources. Once you mark five checkboxes, you cannot mark a sixth.

Sources of support that you include on the RTD must list the trainee/student in a project role such as PD/PI, co-investigator, faculty collaborator, or staff scientist. If you mark the checkbox of a record with a non-supported project role, an error will occur when you mark the checkbox, which states: "*Subsequent support may only be reported if the indi-vidual had the following role: PD/PI, Staff Scientist, Faculty, or Co-Investigator.*"

To add an NIH or Agency grant as a support source:

1. In the *Subsequent Grants* pane, click the **Add Source of Support** button. The *Add Source of Support* popup appears.

Add Source of Suppor	rt		×
Search for and s Search Criteria * Required Field	select a Funding Sou	rce	
Activity Code *	IC Code *	Serial Number	Suffix Code
Start Date	End Date	PD/PI Last Name	
Institution			
Select One			~
			Cancel <b>Q</b> Search Funding Sources

- 2. Enter search criteria to search for existing NIH/Agency grants that provided funding. Red asterisks denote required fields.
- 3. Click the **Search Funding Sources** button.
- 4. In the search results, click the **Eselect this funding source** button for the funding source you want to add.
- 5. The popup then displays the Step 2: Enter Source of Support Details section. In this popup, choose the role and enter Start of Funding and End of Funding in mm/yyyy format to indicate the dates of the individual's involvement.

Progress: 50%	5		
Step 2: Enter Source of Support Details			
Funding Source: Epigenomics of Patient Outcomes after Aneurysmal SAH			
Role during funding:		Other role description:	
Trainee	•		
Start of Funding (mm/yyyy):			
10/2016			
End of Funding (mm/yyyy):			
09/2017			

 Click the Save and Exit button. Alternatively, if you want to add another funding source, click the Save and Add Another Source of Support button to be returned to the funding search popup.

#### To add support from non-NIH/Agency sources of support:

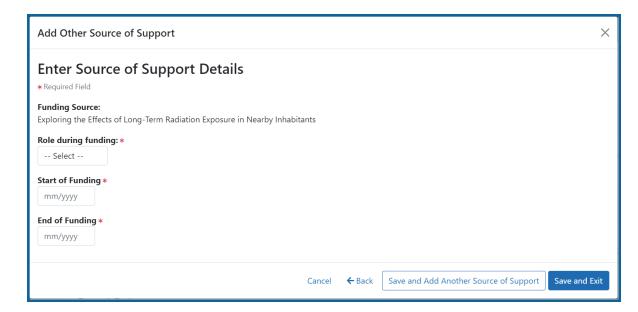
1. In the *Subsequent Grants* pane, click the **Add Other Source of Support** button to open the *Add Other Source of Support* popup.

Add Other Source of Support						
Search for and select a Funding Sour Search Criteria Type of Funding Source	rce Source of Support					
Fellowship Other Research Assistantship	Foundation (Fdn) National Science Foundation (NSF) Non-US (Non-US)					
Funding Source Number	Project Title					
Ex: ABC-D1234	Ex: metabolic changes and					
Start Date (mm/yyyy or yyyy)	End Date (mm/yyyy or yyyy)					
	Cancel Q Search Funding Source	es				

- 5. Search for support by entering search criteria.
- 6. Click the **Search Funding Sources** button.
- 7. In the search results, click the **ESelect this funding source** button for the funding source you want to add.
- 8. If the funding source you are looking for does not appear, click the link to **create a new funding source here**.

Add Other Source of Support	×
Search for and select a Funding Source *Required field(s)	
Type of Funding Source *	Source of Support *
Select One	Select One
Project Title *	Funding Source Number
Start Date (mm/yyyy or yyyy)	End Date (mm/yyyy or yyyy)
mm/yyyy or yyyy	mm/yyyy or yyyy
Description	
	a a a a a a a a a a a a a a a a a a a
	Cancel  ← Back  → Create Funding Source

- a. Manually enter the funding source that you would like to cite. Provide information about the funding source you are creating. Red asterisk fields are required.
- b. When finished, click the **Create Funding Source** button.



- c. Select an option from the **Role during funding** dropdown.
- d. Enter Start of Funding and End of Funding in mm/yyyy format.
- e. Click the Save and Exit button.

#### **Publications**

Click the **Expand** button for the Publications panel to display peer-reviewed publications and manuscripts accepted for publication in peer-reviewed journals.

<ul> <li>Note: For any past participant who exited the program more than 10 years ago, that person's publication information will not appear in tak</li> <li>You cannot add a publication if its supervising Faculty member is not listed.</li> <li>Existing Faculty Added to the RTD:</li> <li>Curie, Marie</li> </ul>	ble 5 of the RTD.					
Existing Faculty Added to the RTD:						
If the supervising Faculty member is not listed, add the Faculty Member first, then add a publication.						
□ There are no publications for this student.						
+ Add Publication Manually + Add	d PubMed Publication					
Filter Table 1 Results	< 1 of 1 ~ >					
Authors *         Title ÷         PMID ÷         Faculty Member ÷						
Curie, M, Sklodowska, S, and Curie, P Long-Term Effects of Radium . Exposure on Nearby Inhabitants 27804982 Curie, Marie						

For students/trainees, list all publications resulting from their period of training in the participating faculty member's laboratory or in association with the current training program, through completion of their degree. Do not list publications resulting from work done prior to entering the training program or arising from research initiated after the completion of the program.

#### To indicate the trainee/student has no publications:

In the Publications section, click the checkbox titled *Check this box if there are no publications for this trainee*. **NOTE:** This button does not appear until you add faculty to the RTD using the Participating Faculty section.

The No Publications popup appears.

- 2. Select the Faculty Member and Reason for No Publications, and click Save.
- If you change your mind and want to add a publication, clear the checkbox and the Add Publication button reappears.

#### To add a publication by searching PubMed/PubMed Central:

1. In the Publications section, click the **Add Publication** button.

**NOTE:** This button does not appear until you add faculty to the RTD using the Participating Faculty section.

The *Add Publication* popup appears, where you search for the publications to add or manually enter an article citation.

Add PubMed Publication for Curie, Pierre							
Search Publication on PubMed							
PubMed ID/PubMed Central ID							
e.g. 123456789,PMC1234567							
Enter one or more IDs, separated by commas							
Author First Name	Author Last Name	Title					
e.g. Jane	e.g. Doe	Enter a keyword					
		Cancel Q Search PubMed					

- 2. Enter search criteria using one of the methods below.
  - a. Pub Med ID/PubMed Central ID: Enter IDs for articles listed in PubMed or PubMed Central. To search for multiple articles at once, enter a comma separated list of IDs, which can be from either PubMed or PubMed Central. Precede PubMed Central IDs with "PMC" as shown below.

Examples:

- Enter **PMC7679077** to search for a PubMed Central article (PMCID)
- Enter **32226987** to search for a PubMed article (PMID)
- Enter PMC7679077, 32226987 to search for both articles at once
- b. **First Name.** Enter all or a portion of the first name; articles with the text you enter here are found.
- c. Last Name. Enter the *exact last name*; only exact matching last names are found.
- d. **Title.**For publication title, enter one or more keywords; only those publications whose titles that contain all keywords are found.

- 3. Click the **Search** button. The Publication Search Results appear, where you can add any number of publications by marking their checkboxes.
- 4. To add a publication from search results:
  - 1. Select its **Include in RTD** checkbox
  - 2. Choose from the **Faculty Member** dropdown. The faculty members listed are those in the Participating Faculty section of this RTD in XTRACT.
  - 3. Choose the current trainee/student that you are editing from the **Author** dropdown. The list of authors is pulled from PubMed/PubMed Central.
  - 4. Click the **Save** button.

If you indicate a **Faculty Member**, an **Author**, or mark the checkbox of a publication, but omit the rest of the fields, then you will receive the warning on saving: *No publications were selected to report on the RTD*. This means that the publication won't be added due to insufficient information for the publication. Before saving, be sure to fill out all required fields for a publication record that you want to add.

#### To add a publication by manually citing it:

Instead of searching for PubMed/PubMed Central publications, you can manually enter all the necessary information to create a citation.

- In the Publications section, click the Add Publication Manually button.
   NOTE: This button does not appear until you add faculty to the RTD using the Participating Faculty section.
- 2. The *Manually Add Publication* popup appears.
- a. The information needed to define a citation is shown on the screen -- Title, Journal, Faculty Member, Volume, Inclusive Pages, Year, and Authors. Enter information for all fields that apply, being sure to enter information for the required fields that have a red asterisk.
  - b. You can enter multiple authors to compile a list of all authors of the publication. To add an author, enter the author's name in the **Authors** text box and click the **Add Author** button:

Repeat to add more authors. As authors are entered, the list of authors is displayed as shown below. Use the controls to re-order the list.

Select the student's name and click the **Highlight This Student** button.

- c. When finished entering the citation information, click the **Review** button, which gives you the opportunity to review the citation you entered.
- 4. Click the **Add** button to add the manual citation.

The publications you added appear in a table in the Publications section.

Click the **Example** three-dot ellipsis button and select **Edit Publication** or **Delete Publication** to update or remove a publication.

# Participating Trainees (Revision)

Displays the participating trainees added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove participating trainees.

Prepare Research Training Dataset (RTD) for Revision							
RTD 5T32ES123456-25 Long-Te Exposure on Nearby Inhabita		PD/PI dium Curie, Marie (Co	ntact)				
Participating Trainee	es 😮						
Filter Telele							
Filter Table	63 Results				≛ ⊞	< 1 of 3 ∨ >	
Person Name	63 Results	Commons User ID 🌻	Person ID 🌲	Trainee Type 🌲	Start Date ≑	<ul> <li>&lt; 1 of 3 ∨ &gt;</li> <li>End Date \$</li> </ul>	
Person Name 🔺	63 Results		Person ID ≑	Trainee Type 💠			
	63 Results	Commons User ID ≑	Person ID 🔶		Start Date ≑	End Date 🌲	

Figure 87: Participating Trainees

Participating trainee(s) are listed in a table at the bottom of the screen along with the following information:

- Person Name
- **Commons User ID** (if available)
- Person ID
- **Trainee Type**: Pre-doc; Post-doc; Short Term
- Start Date
- End Date
- The hyperlinked trainee name opens the *Participating Trainee Detail* for the selected trainee. Refer to the topic titled Refer to *Participating Trainee Detail (RPPR)* on page 84.
- The **Remove Trainee** button removes the person from the RTD.

The **Add Trainee** feature allows you to search for and add existing trainees or create new xTRACT persons to add to the RTD.

# Add Trainee(s)

## To add an individual trainee:

- 1. Select the **Add Trainee** button.
- 2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

3. All matching records display in the **Person(s)** table. Click the **Add Trainee as** dropdown in the **Add to RTD** and select the appropriate option to add the person.

**NOTE:** After you perform a search, the **Create xTRACT Person** button is enabled. Use this button to create an xTRACT Person record. Refer to the topic titled Refer to *Create xTRACT Person* on page 264 4. Click the **Add Person(s)** button to add them to the RTD.

## To add multiple trainees via Bulk Upload:

- 1. Click the **Upload Participating Trainees** link below the *Participating Trainees* table.
- 2. The top part of the Upload Participating Trainees section of the page will list the guidelines for the upload file. Click the **Show More** link to view them.
- 3. A link is displayed below the guidelines to download a template showing the file format.
- 4. Click the **Browse** button at the bottom of the section to go to the file location for an existing upload file.
- 5. When the file is selected, the system will perform a validation to ensure that the file conforms to the correct format and that the data satisfies the conditions described in the guidelines.
  - A pop-up message will display if the format is not valid and that file will not be uploaded. Any data validation errors must be corrected before any changes are accepted and applied.
  - If there are no validation errors then the data will be applied and a success message will appear.

# **Edit Trainee**

From the list of trainees, click a hyperlinked trainee name to edit the trainee detail for the selected trainee.

Refer to the topic titled Refer to Participating Trainee Detail (Revision) on page 231.

# Remove

Select the **Remove Trainee** button to remove the trainee from the RTD. At the confirmation, select **Delete**.

# Participating Trainee Detail (Revision)

While preparing an RTD for a Revision, you can open the *Participating Trainee Detail* for a trainee by clicking the trainee's hyperlinked name. The *Participating Trainee Data* for

the selected person is grouped into panels. Use the **Expand** button and **Edit** buttons and links to display and edit the information as detailed below.

Prepare Research Training Dataset (RTD) for Revision							
RTD 5T32ES123456-25 Long-Term Effects of Radium Exposure on Nearby inhabitants	T32ES123456-25 Long-Term Effects of Radium Curie, Marie (Contact)						
Participating Trainee Details 😯							
Curie, Marie Post-Doc							
To finalize the RTD, it is required to set the trainee's training years.	; training years with "start date," and if th	ne trainee is no longer in training, then "er	nd date" is also needed to set				
Commons User ID Email MARIECURIE eratest@nih.gov	In Training? No	Start Date into Postdoctoral Research ① None	End Date 1 None				
Research Topic None							
			🖬 Edit				
			Open All Sections				
✓ Support During Training							
> Faculty Members							
> Degrees							
> Post-Training Positions			1				
> Subsequent Grants							
> Publications							

Figure 88: Participating Trainee Detail (Revision)

**IMPORTANT:** The information displayed in the trainee detail is comprised of information pulled from the trainee's eRA Commons Personal Profile, where available. However, updates made to the xTRACT trainee detail will not update that trainees Personal Profile in Commons.

## Trainee Data

Use the **View** link in the **Trainee Data** panel of the *Participating Trainee Detail* to display the following read-only information, as applicable:

- Person ID or Commons ID
- Email

## In Training Data

Use the **View** link in the **In Training Data** panel of the *Participating Trainee Detail* to display in training data as described below. Use the **Edit** button to open the fields in a popup for editing.

- In Training
- Type
- Research Topic
- Start Date
  - Current Degree-Granting Program for a Predoctoral trainee
  - Postdoctoral Research for Postdoctoral trainee
- End Date (when Trainee Left Program)

**NOTE:** In order to finalize the RTD for an RPPR, all trainees must have a start date in the **In Training Data** section. Additionally, trainees with *No* selected for **In Training** status must have an end date.

## **Faculty Members**

Displays the participating faculty added to the RTD.

To add faculty, select the **Add Faculty Member** button.

**NOTE:** Up to two faculty members may be associated with a student. If there already two faculty members listed, then the **Add Faculty Member** button does not display. To change a faculty member, delete the appropriate one first and then add the new one.

- 1. Use the parameters on the Search for Person(s) window to find the faculty member.
- In the Search for Faculty screen, uncheck the box titled Search for persons who have a Commons affiliation with my institution to search for persons outside of your institution.

**NOTE:** You must enter a Commons ID, Person ID, or Last Name to perform a search.

Search for Faculty			×
e 🚍 Search Criteria			
Either Commons User ID or Person ID o     Commons User ID	r Last Name is required to perform person search. * Person ID		
First Name 2	Middle Name	* Last Name Shorts%	
Search for persons who have a Com	ions affiliation with my institution		
You can perform a wildcard search on Con For example: abcd% or %abcd% or ab%co	mons ID or Last Name, by using the "%" character. %.		
Search Persons Clear			
3			Close

*Figure 89: Search for Faculty* 

- 3. Select the **Search Persons** button. All matching records display in the **Person(s)** table.
- In the Persons table, select the Add to RTD check box for the person to add to the RTD.
- 5. Click the **Add Person(s)** button.
- 6. (Optional) Repeat the steps above to search for and add other faculty as necessary.

**NOTE:** Once two faculty members are added, the ability to add more is disabled. You must remove a faculty member before you can add a different one.

To remove a faculty member from the RTD, select the **Delete** link in the **Action** column.

## Support During Training

**NOTE:** This section applies to pre-doc and and post-doc trainees only.

Sources of support, both within and outside of NIH, can be maintained in this section. Click on the collapsed panel to display the information.

After a start date has been added for the trainee in *In Training Data*, the **Training Years (TYs)** will be displayed as read-only with corresponding abbreviations for funding sources in **Support During Training**.

#### **This NIH Training Grant**

Includes the NIH Grant number, Project Title, Period of Support.

Click the Add This NIH Source of Support to add support from This NIH Training Grant. Enter the Start of Funding and End of Funding. To remove support from This NIH Training Grant, select Delete All from This NIH Funding Source of Support.

#### **NIH Sources of Support**

NIH & Other Agency Sources of Support include the Grant number, Project Title, Project Role, Period of Support, and Source.

**IMPORTANT:** You cannot delete training grant appointments that are reported from xTrain.

This NIH Training (				Sources re from xTF	RAIN			Showing 1 - 3 of total
NIH Grant	<b>^</b>	Project Title		cannot be o	leleted	f Support	¢ Source	Action
T32AB6543		Infectious Diseases Training Program	l		0112003	to 06/2004		
21 T32ZX9873		Infectious Diseases Training Program			07/2005	to 06/2006		
145 13201-0442 12 12 14 14 5 00 14 5 00 14 5 00 14 5 16		Infectious Diseases Training Program	Select to add support for this I training grant	ИН	06/2009	to 07/2010	Edit or Delete only available for sources reported from xTRACT	Edit Delete

To add additional NIH or Other Agency support:

- 1. Enter **Start of Funding** and **End of Funding** to indicate the dates of this person's involvement.
- 2. Click the **Save and Exit** button.
- 3. Click the end three-dot ellipsis button and select **Edit** to modify the source of support.
- 4. (Optional) To remove the source of support, click the 🛄 three-dot ellipsis button and select **Delete**.

#### **Other Sources of Support**

Other non-NIH sources of support include Funding Source, Support Type, Project Number, Project Role, and Period of Support.

Support from This NIH Trainin	g Grant 1 NIH & Oth	er Agency Sources of Support 1	Other Non-NIH Source	es of Support <b>1</b>
Leave of Absence <b>o</b>				
Filter Table 1	Results			+ Add Other Source of Support
Funding Source 🔺	Support Type 🌻	Project Number 🌻	Project Role ≑	Period of Support ≑
Exploring the Effects of Long- Term Radiation Exposure in Nearby Inhabitants	Fellowship		Fellow	05/2022 to 04/2023

To add a source of support:

- Click the Add Other Source of Support button to open the Add Other Source of Support pop-up.
  - a. To search:
    - Enter search criteria in the fields and click the **Search Funding Sources** button.
    - Click the Select this Funding Source button for the correct project. The Enter Source of Support Details screen is displayed.
    - Select the trainee's role from the Role during funding drop-down. If you select Other, enter a description in the Other role description field.

- Enter **Start of Funding** and **End of Funding** to indicate the dates of this person's involvement.
- Click the **Save and Exit** button.
- b. To create a new source of support:
  - Perform a search, which displays the information box.
  - In the *Information* box (at the top or bottom of the list), click the **create a new funding source here** link.
  - Complete the fields and then click **Create Funding Source** button.
  - Select the trainee's role from the Role during funding drop-down. If you select Other, enter a description in the Other role description field.
  - Enter **Start of Funding** and **End of Funding** to indicate the dates of this person's involvement.
  - Click the **Save and Exit** button.

#### Leave of Absence

You can specify a Leave of Absence in this section to account for periods when the trainee remains on the grant but does not receive support from the grant.

Support from This NIH T	raining Grant 🚺	NIH & Other Agency S	ources of Support 1	Other Non-NIH Sources of Support 1
Leave of Absence <b>1</b>				
				+ Add Leave of Absence
Filter Table	1 Results			★ ■ < 1 of 1 < >
Support Type 🔺			Period of Support ≑	
Leave of Absence Leave of	Absence	•••	04/2023 to 06/2023	

To add a Leave of Absence:

1. Click the **Add Leave of Absence** button.

Add Leave of Absence Period	×
Leave of Absence * Required Field	
Start date * mm/yyyy	
End date * mm/yyyy	
	Cancel Save

- 2. In the *Add Leave of Absence Period* window that appears, enter the start month/year and end month/year for the leave of absence.
- 3. Click **Save**.

## Degrees

xTRACT displays a list of completed degrees and associated data in reverse chronological order, with incomplete degrees following.

To add a degree:

- 1. Select the **Add Degree** button.
- 2. Update the fields in the *Create a New Degree* pop-up:
  - **Degree**: Select from the list
  - **Other Degree Text**: Enter the name of the degree if an *OTH* type of degree was selected.
  - Degree Date: Enter in MM/YYYY format
  - **Terminal Degree**: Select the **Yes** or **No** as appropriate. When **Yes** is selected, the terminal degree indicator (This is your terminal degree.) displays next to the degree details in the view. A person can only have one terminal degree.
  - Degree Status: Select Completed or In Progress, as appropriate
  - **Received in Training**: Select Yes or No. Up to three degrees can be set as Received in Training.

- **Degree Institution**: Enter the institution name, one institution per degree. You can search for an institution by selecting the magnifying glass search icon.
- 3. Select the **Save** button to save your changes.
- 4. Repeat for any additional degrees.
- 5. Select the **Close** button when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the degree(s) as necessary. Degrees *Commons Profile* as the **Source** cannot be deleted.

#### **Post-Training Positions**

Displays post-training positions employment information.

To add employment:

- 1. Click the **Add Employment** button.
- 2. Provide the following information:
  - **Workforce Sector**: Choose the area of employment: Academia, Government, For-Profit, Nonprofit, Other.
  - **Principal Activity**: Primarily Research, Primarily Teaching, Primarily Clinical, Research-Related, Further Training, or Unrelated to Research.
  - **Position**: Type the title of the position.
  - **Start Date**: Type the month/year the position started.
  - **End Date**: Type the month/year the position ended, or leave blank if employed to present time.
  - **Primary Employment Indicator**: Select **Yes** if this is the main employment; otherwise, select **No**.
  - Full Time Employment Indicator: Select Full-Time or Part-Time
  - **Current/Initial Employment Indicator**: Select **Primary Initial** if this is the initial employment for the trainee, or select **Primary Current** if it is the current employment.
  - **Institution**: Enter the institution or start typing to see matches to your typed text.

- **Primary Department of Position**: Enter the department or start typing to see matches to your typed text. Matches for the selected Institution are shown.
- 3. Click the **Save** button to save your changes.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the position(s) as necessary. Positions with *Commons Profile* as the **Source** cannot be deleted.

## **Subsequent Grants**

If applicable, list subsequent fellowship, career development, or research grant support obtained from any source after the individual completed training. Sources of support submitted on the RTD should list the trainee/student in a role such as PD/PI, co-investigator, faculty collaborator, or staff scientist.

**NOTE:** xTRACT prepopulates NIH subsequent grant support from xTrain trainee data when available. You cannot delete prepopulated support records from the Subsequent Grants table.

Under *NIH and Other Agency Sources of Support on Record*, indicate up to five subsequent sources of support to include in the RTD. Each button lets you add a different type of support:

**Add Source of Support** button: Add grant support received from NIH and other Agency sources that are on record. If you do not know the specific grant, you can indicate support by entering only the activity code and IC.

Add Other Source of Support button: Add sources of grant support received from non-NIH/Agency sources.

On the Subsequent Grants pane, use the **Edit** and **Remove** buttons in the **Action** column to update or remove the funding source as necessary. Mark up to five **Include in RTD** checkboxes to specify which sources of support will be included in the RTD, which allows only five sources. Once you mark five checkboxes, you cannot mark a sixth.

Sources of support that you include on the RTD must list the trainee/student in a project role such as PD/PI, co-investigator, faculty collaborator, or staff scientist. If you mark the

checkbox of a record with a non-supported project role, an error will occur when you mark the checkbox, which states: "Subsequent support may only be reported if the individual had the following role: PD/PI, Staff Scientist, Faculty, or Co-Investigator."

#### To add an NIH or Agency grant as a support source:

- Enter search criteria to search for existing NIH/Agency grants that provided funding, and then click the **Search Funding Sources** button. Red asterisks denote required fields.
- 2. In the search results, click the **Select this Funding Source** button for the funding source you want to add.
- 3. Select the **Role During Funding** and enter the**Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of the individual's involvement.

Add Source of Support	×
Progress: 50%	
Step 2: Enter Source of Support Details	
Funding Source: Epigenomics of Patient Outcomes after Aneurysmal SAH Role during funding:	Other role description:
Trainee	
Start of Funding (mm/yyyy):	
10/2016	
End of Funding (mm/yyyy):	
09/2017	
	Save Cancel

 Click Save and Exit. Alternatively, if you want to add another funding source, click Save and Add Another Source of Support to be returned to the funding search popup.

#### To add NIH or Agency support by indicating a generic activity code/IC:

If you were supported by an NIH or Agency grant, but do not know the specific grant number, you can instead generically report the trainee's support by activity code and IC only. For example, if you enter *T32* for the activity code and *CA* for the IC, then *T32CA* will appear on the training table form as the source of support.

1. In the *Subsequent Grants* pane, click the **Add Source of Support** button. The *Add Source of Support* popup appears.

Add Source of Suppor	rt		×
Search for and s Search Criteria * Required Field	select a Funding Sour	rce	
Activity Code *	IC Code *	Serial Number	Suffix Code
Start Date	End Date	PD/PI Last Name	
Institution			
Select One			~
			Cancel <b>Q</b> Search Funding Sources

- 2. In the search criteria, enter an activity code and IC ONLY, and then click the **report activity code and IC directly** link.
- 3. Select the **Role during funding** and enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of the individual's involvement.

Add Source of Support					
Progress: 50%					
Step 2: Enter Source of Support Details					
Funding Source: Epigenomics of Patient Outcomes after Aneurysmal SAH Role during funding:	Other role description:				
Trainee					
Start of Funding (mm/yyyy):					
10/2016					
End of Funding (mm/yyyy):					
09/2017					
	Save Cancel				

 Click Save and Exit. Alternatively, if you want to add another funding source, click Save and Add Another Source of Support to be returned to the funding search popup.

To add support from non-NIH/Agency sources of support:

1. In the *Subsequent Grants* pane, click the **Add Other Source of Support** button to open the *Add Other Source of Support* popup.

Add Other Source of Support	×
Search for and select a Funding Sour Search Criteria Type of Funding Source	rce Source of Support
Fellowship Other Research Assistantship	Foundation (Fdn) National Science Foundation (NSF) Non-US (Non-US)
Funding Source Number	Project Title
Ex: ABC-D1234	Ex: metabolic changes and
Start Date (mm/yyyy or yyyy)	End Date (mm/yyyy or yyyy)
	Cancel <b>Q</b> Search Funding Sources

Search for support or create new funding source:

- a. Search for support by entering search criteria and then clicking the **Search Funding Sources** button.
- b. In the search results, click the 🛨 Select this Funding Source button for the funding source you want to add.
- c. If the funding source you are looking for does not appear, find and click the link to **create a new funding source here**, then manually enter the funding source that you would like to cite. Provide information about the funding source you are creating. Red asterisk fields are required. When finished, click the **Create Funding Source and Continue** button.

Add Other Source of Support	×
Search for and select a Funding Source *Required field(s)	
Type of Funding Source *	Source of Support *
Select One	Select One
Project Title *	Funding Source Number
Start Date (mm/yyyy or yyyy)	End Date (mm/yyyy or yyyy)
mm/yyyy or yyyy	mm/yyyy or yyyy
Description	
	<i>b</i>
	Cancel ← Back → Create Funding Source

- 2. In the next step, *Enter Source of Support Details*, select an option from the **Role during funding** dropdown.
- 3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
- 4. Click Save.

#### **Publications**

List peer-reviewed publications and manuscripts accepted for publication in peerreviewed journals. For students/trainees, list all publications resulting from their period of training in the participating faculty member's laboratory or in association with the current training program, through completion of their degree. Do not list publications resulting from work done prior to entering the training program or arising from research initiated after the completion of the program.

Prior to adding publications, add the faculty to which the publications will be associated, using the Participating Faculty section. If faculty are not added prior, you cannot add publications and you get the following message "There are no Faculty Members added to the RTD, you must add the Faculty Member to the RTD in the Participating Faculty section, in order to add publications."

#### To indicate the trainee/student has no publications:

In the Publications section, click the checkbox titled *Check this box if there are no publications for this trainee*. **NOTE:** This button does not appear until you add faculty to the RTD using the Participating Faculty section.

The No Publications popup appears.

- 2. Select the Faculty Member and Reason for No Publications, and click Save.
- If you change your mind and want to add a publication, clear the checkbox and the Add Publication button reappears.

#### To add a publication by searching PubMed/PubMed Central:

1. In the Publications section, click the **Add PubMed Publication** button.

**NOTE:** This button does not appear until you add faculty to the RTD using the Participating Faculty section.

The *Add Publication* popup appears, where you search for the publications to add or manually enter an article citation.

Search Publication on PubMe	ed	
PubMed ID/PubMed Central ID		
e.g. 123456789,PMC1234567		
Enter one or more IDs, separated by comn	nas.	
Author First Name	Author Last Name	Title
e.g. Jane	e.g. Doe	Enter a keyword

- 2. Enter search criteria using one of the methods below and click its **Search** button.
  - PubMed ID/PubMed Central ID: Enter IDs for articles listed in PubMed or PubMed Central. To search for multiple articles at once, enter a comma separated list of IDs, which can be from either PubMed or PubMed Central. Precede PubMed Central IDs with "PMC" as shown below. Examples:

a) Enter **PMC7679077** to search for a PubMed Central article (PMCID)

b) Enter 32226987 to search for a PubMed article (PMID)

- c) Enter **PMC7679077, 32226987** to search for both articles at once
- **Author First Name.** Enter all or a portion of the first name; articles with the text you enter here are found.
- Author Last Name. Enter the *exact last name*; only exact matching last names are found.
- **Title.**For publication title, enter one or more keywords; only those publications whose titles that contain all keywords are found.

The Publication Search Results appear, where you can add any number of publications by marking their checkboxes.

- 3. To add a publication from search results:
  - 1. Mark its **Include in RTD** checkbox.
  - 2. Choose from the **Faculty Member** drop-down. The faculty members listed are those in the Participating Faculty section of this RTD in XTRACT.
  - 3. Choose the current trainee/student that you are editing from the **Author** dropdown. The list of authors is pulled from PubMed/PubMed Central.
  - 4. Click Add Publication(s).
  - 5. To search again without saving, click the **Back to Search** button, enter new search criteria, and click the **Search** button again.

If you indicate a **Faculty Member**, an **Author**, or mark the checkbox of a publication, but omit the rest of the fields, then you will receive the warning on saving: *No publications were selected to report on the RTD*. This means that the publication won't be added due to insufficient information for the publication. Before saving, be sure to fill out all required fields for a publication record that you want to add.

## To add a publication by manually citing it:

Instead of searching for PubMed/PubMed Central publications, you can click the **Manual Edit Publication** button and manually enter all the necessary information to create a citation.

1. In the Publications section, click the **Add Publication Manually** button.

**NOTE:** This button does not appear until you add faculty to the RTD using the

Participating Faculty section.

- 2. The Manually Add Publication popup appears.
- 3. In the Add Publication popup:
  - a. The information needed to define a citation is shown on the screen -- Title, Journal, Faculty Member, Volume, Inclusive Pages, Year, and Authors. Enter information for all fields that apply, being sure to enter information for the required fields that have a red asterisk.
  - b. You can enter multiple authors to compile a list of all authors of the publication. To add an author, enter the author's name in the **Authors** text box and click the **Add New Author** button.

Repeat to add more authors. As authors are entered, the list of authors is displayed as shown below. Use the controls, which are described onscreen, to re-order the list. Select an author and click the **Highlight This Trainee** button to indicate which author is the trainee/student for whom this publication is cited:

- c. When finished entering the citation information, click the **Review** button, which gives you the opportunity to review the citation you entered.
- 4. Click **Add** to add the manual citation.

The publications you added appear in a table in the Publications section.

✓ Publications								
• Note: For any past participant who exited the program more than 10 years ago, that person's publication information will not appear in table 5 of the RTD.								
You cannot add a publication if its supervising Faculty member is not listed. Existing Faculty Added to the RTD:								
<ul> <li>Curie, Marie</li> <li>If the supervising Faculty member is not listed, add the Faculty Member first, then add a publication.</li> </ul>								
□ There are no publications for this trainee.								
+ Add Publication Manually + Add PubMed Publication								
Filter Table 2 Res	Filter Table     Image: 2 Results							
Authors *	Title 🗘	PMID \$		Faculty Member ≑				
Curie Marie and Curie Pierre	Long-Term Effects of Radium Exposure on Nearby Inhabitants			Curie, Marie				

Click the **Example 1** three-dot ellipsis button and select **Edit Publication** or **Delete Publication** to update or remove a publication.

# **Program Statistics (Revision)**

Prepare Research Training Dataset (RTD) f	or Revision			
RTD 5T32ES123456-25 Long-Term Effects of Radium Exposure on Nearby Inhabitants	PD/PI Curie, Marie (Contact)			
Program Statistics 😧				
★ Required Fields				
Are program statistics applicable for this reporting Applicable	period?	Percentage of Trainees Entering Graduate School 10 Years Completed the Ph.D. *	Ago Who	D
○ Not Applicable			0.0	%
		Average Time to Ph.D. for Trainees in the Last 10 Years $ st $		
			0.0	Year(s)
			Clear	Save

Figure 90: Program Statistics (Revision)

The **Program Statistics** section is only available for training grants that have Predoctorate Trainees.

- 1. Enter the program statistics as follows:
  - Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D.
  - Average Time to Ph.D. for Trainees in the Last 10 Years (not including leaves of absence)
- 2. Select the Save Program Statistics button.

Use the checkbox to indicate that **Program Statistics are not applicable for this reporting period**.

# **Applicants and Entrants (Revision)**

**NOTE:** T34 Undergraduate Training Grants lack the *Applicants and Entrants* section of the RTD.

To enter Pre-doc and Post-doc applicants and entrants, first enter the start year of the most recently completed academic year and click the **Submit** button.

Select the **Edit Pre-Doc Applicants and Entrants** and **Edit Post-Doc Applicants and Entrants** buttons to display and enter data for the specific academic year(s).

RTD     PD/PI       ST32ES123456-25 Long-Term Effects of Radium     Curie, Marie (Contact)       Exposure on Nearby Inhabitants     Applicants and Entrants ?	
Start year of the most recently completed academic year *         2023         Submit         The Pre-doc and Post-doc data may be edited via the links below, once the S         Edit Pre-Doc Applicants and Entrants         Edit Post-Doc Applicants and Entrants	Start of the most recently completed academic year has been provided.

#### *Figure 91: Applicants and Entrants*

To change the most recently-completed academic year, change the year entered and select **Submit**. When changing **Academic** years, any data entered for **Applicant and Entrant Counts and Characteristics** are retained and associated with the shifted year based on order of years (rather than previously specified year).

For example, assume the first academic year is 2000-2001 and there is applicant/entrant data entered for that year. If the first academic year is changed to 2001-2002 by changing the most recently-completed academic year from 2001 to 2002, the same applicant/entrant data display for that first year.

# **Predoctoral Applicant and Entrant Counts and Characteristics (Revision)**

## **Edit the Counts and Characteristics**

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

Prepare Research Training Dataset (RTD) for Revision								
	-25 Long-Term Eff earby Inhabitants	ects of Radium	PD/PI Curie, N	Marie (Contact)				
2023 - 2024	2022 - 2023	2021 - 2022	2020 - 2021	2019 - 2020	Summary			
Predoctora	l Applicant ai	nd Entrant Co	ounts and Cha	aracteristics 🕻				
> Counts	Department or	Program						Open All Sections

Figure 92: Predoctoral Applicant and Entrants Counts and Characteristics

#### **Counts table**

For Predoctoral Applicants and Entrants, Counts are entered by Participating Departments or Program. If a Department or Program is missing, refer to the topic titled Refer to *Participating Departments and Programs (Renewal)* on page 104. The following fields are provided for data entry on each department or program:

- Department or Program (read only)
- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

## **Summary of Counts and Characteristics**

Select the **Summary** tab to display a summary for predoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.

To edit this information, refer to the above section of this topic.

## Postdoctoral Applicant and Entrant Counts and Characteristics (Revi-

#### sion)

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

**NOTE:** T34 Undergraduate Training Grants lack the *Applicants and Entrants* section of the RTD.

Prepare Research Training Dataset (RTD) for Revision							
	-25 Long-Term Effects o earby Inhabitants	of Radium	PD/PI Curie, M	/larie (Contact)			
2023 - 2024	2022 - 2023 202	21 - 2022	2020 - 2021	2019 - 2020	Summary		
Postdoctor	al Applicant and E	Entrant Co	ounts and Ch	aracteristics	8		
						Open All Sections	
> Counts:	Degree Types						

*Figure 93: Postdoctoral Applicant and Entrants Counts and Characteristics* 

# **Counts table**

For PhDs, MDs, dual-degree holders, and other degree holders, update the following information:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

## **Summary of Counts and Characteristics**

Select the **Summary** tab to display a summary for postdoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.

To edit this information, refer to the above section of this topic.

# **Appointments (Revision)**

Displays the training positions awarded and appointed, separately within two tables.

**NOTE:** The screen varies between T34 (undergraduate training grant) and other types of training grants. T34s have only undergraduates, so field labels reflect undergraduates instead of doctoral trainees if you are working on a T34.

RTD 5T32ES123456-25 Long-Ter Exposure on Nearby Inhabita		PD/PI Curie, Marie (Contact)				
Appointments ? Training Positions Awarded						
	Budget Year 21	Budget Year 22	Budget Year 23	Budget Year 24	Sum of Budget Years	
Predoctoral Awarded	0	0	0	0	0	
Postdoctoral Awarded	7	8	8	8	31	
Short-Term Awarded	0	0	0	0	0	
raining Positions App	ointed					
	Budget Vear 21	Rudget Vear 22	Rudget Vear 23	Rudget Year 24	Sum of Budget Vears	
Predoctoral Appointed	0	0	0	0	0	
Pre-doc Dual Degree	0	0	0	0	0	
Pre-doc Underrepresented Groups	0	0	0	0	0	
Postdoctoral Appointed	7	8	7	0	22	
Post-doc MD or Equivalent	0	0	0	0	0	
Post-doc PhD or Equivalent	7	8	7	0	22	
Post-doc DDS, DVM, Other	0	0	0	0	0	
Post-doc Dual Degree	0	0	0	0	0	
Post-doc Underrepresented Groups	0	0	0	0	0	
Short-Term Appointed	0	0	0	0	0	
Short-Term Underrepresented Groups	0	0	0	0	0	

Figure 94: Appointments

# **Training Positions Awarded**

The **Training Positions Awarded** table shows the number of awarded Predoctoral, Postdoctoral, and Short-Term appointments for each budget year. The last column of the table shows the sum of each appointment over all budget years.

This information is read-only.

# **Training Positions Appointed**

The **Training Positions Appointed** table shows the number of appointed training positions for each budget year. The last column of the table shows the sum of each appointment over all budget years. Training positions include:

- Predoctoral Appointed
- Predoc Dual Degree
- Predoc Underrepresented Groups
- Postdoctoral Appointed
- Postdoc MD or Equivalent
- Postdoc PhD or Equivalent
- Postdoc DDS, DVM, Other
- Postdoc Dual Degree
- Postdoc Underrepresented Groups
- Short-Term Appointed
- Short-Term Underrepresented Groups

Use the **Edit Appointments** button to open the table fields for editing. After updating the fields, select the **Save Appointments** button to save the information.

# **Preview PDF (Revision)**

Select the **Preview PDF** link in the RTD pane on the left side of the screen to open save, and/or print the training tables. An *In Progress* watermark will be printed on the *Training Table* PDF until the RTD is finalized.

A copy of the RTD is downloaded to the browser's default location.

# Finalize RTD (Revision)

Certain users have the ability to finalize the RTD for a training grant. Finalized RTDs are marked as *Final* and cannot be edited.

To finalize an RTD:

1. Select the **Finalize RTD** link from the **RTD** links on the left side of the screen.

A confirmation message warns: Are you sure you want to finalized this RTD? Once finalized, the RTD cannot be edited?

**IMPORTANT:** Once you finalize, the RTD cannot be edited. Select the **No** button if you do not wish to finalize.

2. Select the **Yes** button to finalize the RTD. A confirmation screen is displayed when the RTD has successfully finalized.

xTRACT generates a PDF version of the training tables without the *In Progress* watermark, updates the status of the RTD to *Final*, and locks the RTD for editing.

You will have the option to view the finalized PDF at any time on the *Search New RTDs* screen and unfinalize the RTD if needed.

New Applications	Search Research Training Data Sets for New Applications 🕢			
Search RTD for New Applications	New Data Set Identifier New Data Set Project Title			
Initiate RTD for New Application	abcd% or %abcd% or ab%cd% Use % as a wildcard character.	abcd% or %abcd% or ab%cd% Use % as a wildcard character.		
	PD/PI Last Name			
	abcd% or %abcd% or ab%cd%			
	Use '%' as a wildcard character.			
	Clear Search Criteria Search New RTDs			
	RTDs of New Applications			
	Filter Table 4 Results	f1 ~ >		
	RTD ID A Status  Project Title  Project Title  PD/PI Name			
	12498 D Exploring the Effects of Long-Term Radiation Exposure in Nearby Inhabitants Curle, Marie			

Click the hyperlinked RTD ID to view the PDF.

Click the Dufinalize New Application button to edit the RTD.

If data are needed to finalize the RPPR RTD, the appropriate error message(s) display as follows:

• Missing Required Data: Start Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again. • Missing Required Data: End Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.

All trainees must have a start date in the **In Training Data** section. Additionally, trainees with **No** selected for **In Training** status must have an end date.

# Search for Persons

Use the *Persons* screen to search for and access trainee information to maintain profiles or prepare research training data sets for revisions, renewals, or progress reports.

xTRACT   New Applications	Training Grants <b>Persons</b> Institution Data				
Actions	rson * At least one marked field is required to perform person search.				
Search for a Person					
	Commons User ID * Person ID *				
	abcd% or %abcd% or ab%cd%				
	You can perform a wildcard search on Commo				
	First Name Mic		Last Name *		
			abcd% or %abcd% or ab%cd%		
			You can perform a wildcard search on Last name.		
			Clear Q Search Persons		

Figure 95: Search for Person(s)

хT	RACT   New Applications	Training Grants <b>Persons</b> Institu	tion Data			
	Actions Search for a Person	> Search Criteria				
		Persons Filter Table 5 Results 2 E < 1 of 1 ~ 2				
		Person Name	Commons User ID ≑	Person ID 🌲	Commons Institution ≑	Email ≑
		Curie, Marie	MARIECURIE	140133387	Nih - Office Of The Director	eratest@nih.gov
		Curie, Pierre	PIERRECURIE	140133388	University Of Paris	eratest@nih.gov
		1 Looking for a Person b	ut don't see that person listed? Y	ou can <u>create a i</u>	new xTRACT person record here.	

Figure 96: Search for Person(s) and Results

- 1. Select the **Persons** tab to access the *Search for Person(s)* screen.
- 2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by clearing the **Search for persons who have a Commons affiliation with my institution** box.

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

All records matching the entered search criteria display in the **Person(s)** section of the screen. If no programs meet the entered criteria, the following message displays: Nothing found to display.

The matching records are presented in a table and include the following related information:

- Person Name
- Commons User ID
- Person ID
- Commons Institution
- Email

Click the hyperlinked person's name to view their profile.

**NOTE:** After searching for persons, the **create a new xTRACT person record here** link becomes available. Select this button to access the *Create xTRACT Person* screen. Refer to the topic titled Refer to *Create xTRACT Person* on page 264 more information.

# **xTRACT** Person Profile

#### **Accessing the Person Profile**

- 1. Select the **Persons** tab to access the *Search for Person(s)* screen.
- Enter parameters and select the Search Persons button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by clearing the Search for persons who have a Commons affiliation with my institution box.

**NOTE:** You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

All records matching the entered search criteria display in the **Person(s)** section of the screen. If no programs meet the entered criteria, the following message displays: Nothing found to display.

The matching records are presented in a table and include the following related information:

- Person Name
- Commons User ID
- Person ID
- Commons Institution
- Email

**NOTE:** After searching for persons, the **create a new xTRACT person record here** link becomes available. Select this button to access the *Create xTRACT Person* screen. Refer to the topic titled Refer to *Create xTRACT Person* on page 264 more information.

3. Select the **Edit** link for the specific person profile being modified.

The *xTRACT Person Profile* screens displays for the selected person. Person Data, Sources of Support, Degrees, and Employment can all be maintained in this profile.

Person Profile 👔 Boop, Betty		
🗢 🚍 Person Data	(+ Open A	Il Sections ]
Full Name	Boop, Betty	
Commons User ID	BETTYBOOP_EDI	
Email	eRAStage@mail.nih.gov	
Primary Institution Affiliation in Commons	DAN'S INSTITUTION	
Sources of Support		
O 🛷 Degrees		
C 😫 Employment		

Figure 97: Sample xTRACT Person Profile

## Person Data

Use the **View** link in the **Person Data** panel of the *xTRACT Person Profile* to display the following information:

- Full Name
- Commons User ID
- Email
- Primary Institution Affiliation in Commons

Use the **Edit** links to open the fields for editing. Commons User ID cannot be edited.

## **Sources of Support**

**NOTE:** This section applies to pre-doc and and post-doc trainees only.

Sources of support, both within and outside of NIH, can be maintained in this section. Use the View button on the collapsed panel to display the information.

**IMPORTANT:** You must first select the **Edit** button to open the fields for editing.

#### **NIH Sources of Support**

NIH & Other Agency Sources of Support include the Grant number, Project Title, Project Role, Period of Support, and Source.

				Sources rep from xTR	AIN				Showing 1 - 3 of tot
NIH Grant	<b>^</b>	Project Title		cannot be d	eleted	Support	¢ Source	¢	Action
T32AB6543		Infectious Diseases Training Program	(		0112003 t	o 06/2004			
21 T32ZX9873		Infectious Diseases Training Program			07/2005 t	o 06/2006			
145 132171.04442 12 		Infectious Diseases Training Program	Select to add support for this N training grant	HIN	06/2009 t	o 07/2010	Edit or Delete only available for sources reported from xTRACT		Edit Delete

To add additional NIH or Other Agency support:

- 1. Enter **Start of Funding** and **End of Funding** to indicate the dates of this person's involvement.
- 2. Click the **Save and Exit** button.
- 3. Click the end three-dot ellipsis button and select **Edit** to modify the source of support.
- 4. (Optional) To remove the source of support, click the 🔛 three-dot ellipsis button and select **Delete**.

#### **Other Sources of Support**

Other non-NIH sources of support include Funding Source, Support Type, Project Number, Project Role, and Period of Support.

Support from This NIH Trainin	g Grant 🚺 🔹 NIH & Othe	r Agency Sources of Support 1	Other Non-NIH Sources	of Support 1
Leave of Absence <b>o</b>				
Filter Table 1	Results		1	+ Add Other Source of Support
Funding Source 🔺	Support Type 🌻	Project Number 🌻	Project Role 🌻	Period of Support ≑
Exploring the Effects of Long- Term Radiation Exposure in Nearby Inhabitants	Fellowship		Fellow	05/2022 to 04/2023

To add a source of support:

1.

- a. To search:
  - Enter search criteria in the fields and click the **Search Funding Sources** button.
  - Click the **Enter Select this Funding Source** button for the correct project. The Enter Source of Support Details screen is displayed.
  - Select the trainee's role from the Role during funding drop-down. If you select Other, enter a description in the Other role description field.

- Enter **Start of Funding** and **End of Funding** to indicate the dates of this person's involvement.
- Click the **Save and Exit** button.
- b. To create a new source of support:
  - ° Perform a search, which displays the information box.
  - In the *Information* box (at the top or bottom of the list), click the **create a new funding source here** link.
  - Complete the fields and then click **Create Funding Source** button.
  - Select the trainee's role from the Role during funding drop-down. If you select Other, enter a description in the Other role description field.
  - Enter **Start of Funding** and **End of Funding** to indicate the dates of this person's involvement.
  - Click the **Save and Exit** button.

#### Leave of Absence

You can specify a Leave of Absence in this section to account for periods when the trainee remains on the grant but does not receive support from the grant.

Support from This NIH T	raining Grant 🚺	NIH & Other Agency S	ources of Support 1	Other Non-NIH Sources of Support 1
Leave of Absence 1				
				+ Add Leave of Absence
Filter Table	1 Results			★ 田 < 1 of 1 ~ >
Support Type 🔺			Period of Support ≑	
Leave of Absence Leave of	fAbsence	•••	04/2023 to 06/2023	

To add a Leave of Absence:

1. Click the **Add Leave of Absence** button.

Add Leave of Absence Period	×
Leave of Absence * Required Field	
Start date * mm/yyyy	
End date * mm/yyyy	
	Cancel Save

- 2. In the *Add Leave of Absence Period* window that appears, enter the start month/year and end month/year for the leave of absence.
- 3. Click **Save**.

## Degrees

Click on the collapsed panel to display degree details. xTRACT displays a list of completed degrees and associated data in reverse chronological order, with incomplete degrees following.

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

Select the **Edit** button to open the fields for editing.

To add a degree:

- 1. Select the **Add Another Degree** button.
- 2. Update the fields:
  - **Degree**: Select from the list. See Refer to *Degree Key* on page 265.
  - Other Degree Text
  - **Degree Date**: Enter in MM/YYYY format

- **Terminal Degree**: Select the **Yes** or **No** radio button as appropriate. When the **Yes** button is selected, the terminal degree indicator (This is your terminal degree.) displays next to the degree details in the view.
- Degree Status: Select Completed or In Progress, as appropriate
- **Degree Institution**: Enter the institution name, one institution per degree. You search for an institution by selecting the magnifying glass search icon.
- 3. Select the **Save This Degree** button to save your changes.
- 4. Repeat for any additional degrees.

Use the **Edit** and **Delete** links in the **Action** column to update or remove degree information as necessary. Degrees with *Commons Profile* as a **Source** cannot be deleted.

## **Employment**

Click on the collapsed panel to display information about post-training employment positions. The employment positions are categorized as follows:

- Primary Position
- Current Positions
- Past Positions

The **Source** of positions is displayed as read-only as *xTRACT* (meaning the position was added or updated for the person in xTRACT) or as *Commons Profile* (meaning the position is from the Commons Personal Profile of the person).

Select the **Edit** button for the appropriate position type to open the fields for editing.

To add employment:

- 1. Select the **Add Employment** button.
- 2. Provide the following information:
  - **Workforce Sector**: Choose the area of employment: Academia, Government, For-Profit, Nonprofit, Other.
  - **Principal Activity**: Primarily Research, Primarily Teaching, Primarily Clinical, Research-Related, Further Training, or Unrelated to Research.
  - **Position**: Type the title of the position.
  - **Start Date**: Type the month/year the position started.

- **End Date**: Type the month/year the position ended, or leave blank if employed to present time.
- **Primary Employment Indicator**: Select **Yes** if this is the main employment; otherwise, select **No**.
- Full Time Employment Indicator: Select Full-Time or Part-Time
- **Current/Initial Employment Indicator**: Select **Primary Initial** if this is the initial employment for the trainee, or select **Primary Current** if it is the current employment.
- **Institution**: Enter the institution or start typing to see matches to your typed text.
- **Primary Department of Position**: Enter the department or start typing to see matches to your typed text. Matches for the selected Institution are shown.
- 3. Click the **Save** button to save your changes.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary. Positions with a **Source** of *Commons Profile* cannot be deleted.

# Create xTRACT Person

In order to create an xTRACT person, you must <u>first perform a search</u> to verify that the person record does not already exist. Verify that the results of the search – displayed in the **Person(s)** table – do not include the person you are creating.

To continue creating the xTRACT person, follow the steps below.

- 1. Enter the person data in the designated fields.
  - Prefix: Select an option from the list.
  - Suffix: Select an option from the list.
  - First Name (required)
  - Middle Name
  - Last Name (required)
  - Email Address (required)
- 2. Select the **Save** button to save the changes. A confirmation screen is displayed.
- 3. Click the **Confirm** button. The person profile is created and displayed onscreen.

You can cancel the action at any time without saving changes by selecting the *Cancel* button.

★ Required Fields	
Prefix	Suffix
Select	Select
First Name *	Middle Name
Ex.: Jane	Ex.: Emily
Last Name *	Email Address
Ex.: Doe	Ex.: jane.doe@example.com

Figure 98: Create xTRACT Person

After saving, the screen updates to show the addition in the **Person(s)** table.

Use the **Edit** link to edit the *xTRACT Person Profile*. Refer to the topic titled Refer to *xTRACT Person Profile* on page 257 for more information.

# **Degree Key**

Abbreviation	Degree
AB	BACHELOR OF ARTS
ВА	BACHELOR OF ARTS
вотн	OTHER BACCALAUREATE
BS	BACHELOR OF SCIENCE
BSN	BACHELOR OF SCIENCE IN NURSING

Abbreviation	Degree
DC	DOCTOR OF CHIROPRACTIC
DDOT	OTHER DOCTOR OF MEDICAL DENTISTRY
DDS	DOCTOR OF DENTAL SURGERY
DMD	DOCTOR OF MEDICAL DENTISTRY
DNSC	DOCTOR OF NURSING SCIENCE
DO	DOCTOR OF OSTEOPATHY
DOTH	OTHER DOCTORATE
DPH	DOCTOR OF PUBLIC HEALTH
DPM	DOCTOR OF PODIATRIC MEDICINE
DRPH	DOCTOR OF PUBLIC HEALTH
DSC	DOCTOR OF SCIENCE
DSW	DOCTOR OF SOCIAL WORK
DVM	DOCTOR OF VETERINARY MEDICINE
EDD	DOCTOR OF EDUCATION
ENGD	FOREIGN - DOCTOR OF ENGINEERING
FAAN	FELLOW OF THE AMERICAN ACADEMY OF NURSING
D	DOCTOR OF JURIS PRUDENCE
МА	MASTER OF ARTS

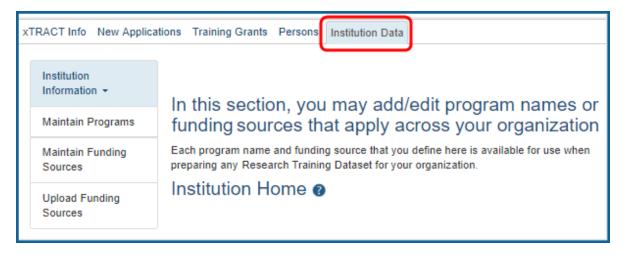
Abbreviation	Degree
MB	FOREIGN - BACHELOR OF MEDICINE
MBA	MASTER OF BUSINESS ADMINISTRATION
MBBS	FOREIGN - BACHELOR OF MEDICINE AND SURGERY
MD	DOCTOR OF MEDICINE
MDOT	OTHER DOCTOR OF MEDICINE
MLS	MASTER OF LIBRARY SCIENCE
МОТН	OTHER MASTERS
MPA	MASTER OF PUBLIC ADMINISTRATION
МРН	MASTER OF PUBLIC HEALTH
MS	MASTER OF SCIENCE
MSN	MASTER OF SCIENCE IN NURSING
ND	DOCTOR OF NATUROPATHY
OD	DOCTOR OF OPTOMETRY
ОТН	OTHER
PHD	DOCTOR OF PHILOSOPHY
PHMD	DOCTOR OF PHARMACY
PSYD	DOCTOR OF PSYCHOLOGY
RN	REGISTERED NURSE

Abbreviation	Degree
SCD	DOCTOR OF SCIENCE
VDOT	OTHER DOCTOR OF VETERINARY MEDICINE
VMD	DOCTOR OF VETERINARY MEDICINE

# Institution Data

Select the Institution Data tab to display options for maintaining Institution Information. Refer to the related topic for more information on the following:

- Departments and Programs
- Maintain Funding Sources
- Upload Funding Sources



# Search for Departments and Programs at the Institution

Departments are maintained by eRA in the Institution Profile. Please have a Signing Official (SO) contact the Service Desk to correct any errors or omissions with regard to Departments.

Programs are maintained within xTRACT by users affiliated with the institution for use within RTDs submitted for grants affiliated with the institution. If you can't find a Program that you're looking for, you can create one.

To search for a program:

1. Select the **Departments and Programs** link on the left side of the screen. The *Departments and Programs* screen is displayed.

If there are no programs at your institution, the *Programs* screen displays with the following message: There are no programs defined yet for your organization. Use the Create Program to start defining programs.

If there are programs at your institution, the *Programs* screen displays the programs in a table and include the following related information:

- Department/Program Name
- Type
- Program Description

The *Departments and Programs* screen also displays the following message: If you can't find a Program that you're looking for, you can **create one**.

Departments and Programs						
<ul> <li>Departments are maintained by eRA in the Institution Profile. Please have a Signing Official (SO) contact the Service Desk to correct any errors or omissions with regard to Departments.</li> <li>Programs are maintained within xTRACT by users affiliated with the institution for use within RTDs submitted for grants affiliated with the institution. If you can't find a Program that you're looking for, you can <u>create one.</u></li> </ul>						
Filter Table 500 Results	Filter Table 500 Results 1 of 20 V					
Department/Program Name	Туре ≑	Program Description ≑				
ADMINISTRATION	Department					
ADULT AND GERIATRIC HEALTH	Department					
ANTHROPOLOGY	Department					
Applied Physical Sciences	Program					
	Department	•				

Figure 99: Departments and Programs at an Institution

**NOTE:** The *Departments and Programs* screen also displays, the **create one** link. Select this link to access the *Create Program* screen fields. Refer to the topic titled Refer to *Create a Program at Institution* on page 270 more information.

Use the **Edit Program** button for a specific program to modify that program.

## **Create a Program at Institution**

Access the *Create Program* screen by selecting the **create one** link on the *Departments and Programs* screen.

Create Program 😯		×
<ul> <li>Required field(s)</li> <li>Program Name *</li> </ul>		
Program Description		
250 Characters Remaining		4
	Cancel	Gave Save

*Figure 100: Create Program Screen* 

- 1. Enter the **Program Name**. This field is required and has a limit of 60 characters.
- Optional: Enter a description of the program in the **Program Description** field. This is an optional field and can be left blank. This field has a limit of 250 characters.

3. Select the **Save** button to save the changes.

You can cancel the action at any time without saving changes by selecting the *Cancel* button.

## **Update Programs**

Use the Update Programs screen to edit a program's name and description. To access this screen, select the **Edit Program** button after successfully <u>searching for the program</u>.

- 1. Update the name of the program in the **Program Name** field and/or the description of the program in the **Program Description** field as necessary.
- 2. Select the **Save** button to save the changes.

You can cancel the action at any time without saving changes by selecting the *Cancel* button.

After submitting, the *Update Program* screen shows the following message: Your program (name) was saved successfully. Click here to edit it.

# **Maintain Funding Sources**

Select the **Maintain Funding Sources** link on the left side of the screen to view the *Main-tain Non-NIH Finding Sources* screen.

Institution Information	Maintain Non-NIH Funding Sources 😯	
Departments and Programs	✓ Search Criteria	
Maintain Funding Sources	Type of Funding Source	Source of Support
Upload Funding Sources	Fellowship Other Research Assistantship	Foundation (Fdn) National Science Foundation (NSF) Non-US (Non-US)
	Funding Source Number	Project Title
	Ex: ABC-D1234	Ex: metabolic changes and
	Start Date (mm/yyyy or yyyy)	End Date (mm/yyyy or yyyy)
		Clear Form Q Search Funding Sources

# To search for a funding source:

- 1. Enter and/or select the appropriate search criteria in the *Maintain Funding Sources* fields:
  - Type of Funding Source
  - Source of Support
  - Funding Source Number
  - Project Title
  - Start Date
  - End Date
- 2. Select the **Search Funding Sources** button.

You can use the **Clear** button to remove the entered search criteria and start over.

Matching records display beneath the search fields. The information includes **Project Title**; **Type**; **Number**; **Source of support**; and **Project Dates** (if available).

Click the hyperlinked project title to modify a specific funding source or click the **create a new funding source here** link. See <u>Edit Funding Source</u> or <u>Create Funding Source</u> topic respectively.

# **Create Funding Source**

Access the *Create Non-NIH Funding Source* screen by selecting the **create a new funding source here** link on the *Maintain Non-NIH Funding Sources* screen.

Create Non-NIH Funding Source for Orga	anization ×
★ Required field(s)	
Type of Funding Source *	Source of Support *
Select One	Select One
Project Title *	Funding Source Number
Start Date (mm/yyyy or yyyy)	End Date (mm/yyyy or yyyy)
mm/yyyy or yyyy	mm/yyyy or yyyy
Description	
200 Characters Remaining	
	Cancel Save

#### To add the funding source:

- 1. Enter the following fields as appropriate, taking note of the required fields marked with an asterisk (\*).
  - **Type of Funding Source** (required): Select the appropriate type of funding source from the list: Fellowship; Other; Research Assistantship; Research Grant; Scholarship; Teaching Assistantship; Training Grant
  - **Source of Support**: Select the appropriate choice from the list: NIH; Foundation; National Science Foundation (NSF); Non-US; Other; Other Federal; University
  - **Project Title** (required): Enter the project title for the funding source.
  - Funding Source Number: Enter a funding source number as needed.
  - Start Date (mm/yyyy or yyyy): Enter as MM/YYYY or YYYY
  - End Date (mm/yyyy or yyyy): Enter as MM/YYYY or YYYY

- **Description**: Enter a description of the source as needed. This field has a maximum limit of 200 characters.
- 2. Select the **Save** button to save the information.

## **Edit Funding Source**

xTRACT users with the proper privileges can maintain an institution's funding sources for use in research training data sets for progress reports, revisions, or renewals on existing training grants or for new applications.

The *Edit Funding Source* screen is used to maintain the funding source data.

To access this screen, click a hyperlinked project title after successfully <u>searching for the</u> <u>funding source</u>.

Edit Non-NIH Funding Source	×
* Required field(s)	
Type of Funding Source <b>*</b>	Source of Support *
Research Grant	National Science Foundation (NSF)
Project Title *	Funding Source Number
Long-Term Effects of Radium Exposure on Nearby	
Start Date (mm/yyyy or yyyy)	End Date (mm/yyyy or yyyy)
Description	
200 Characters Remaining	
	Cancel Save

To maintain a funding source:

- 1. Complete the fields in the **Edit Funding Source** section.
  - **Type of Funding Source** (required): Select the appropriate type of funding source from the list: Fellowship; Other; Research Assistantship; Research Grant; Scholarship; Teaching Assistantship; Training Grant
  - **Source of Support**: Select the appropriate choice from the list: NIH; Foundation; National Science Foundation (NSF); Non-US; Other; Other Federal; University
  - **Project Title** (required): Enter the project title for the funding source.
  - Funding Source Number: Enter a funding source number as needed.
  - Start Date (mm/yyyy or yyyy): Enter as MM/YYYY or YYYY
  - End Date (mm/yyyy or yyyy): Enter as MM/YYYY or YYYY
  - **Description**: Enter a description of the source as needed. This field has a maximum limit of 200 characters.
- 2. Select the **Save** button to save the information.

# **Upload Funding Sources**

Access the Upload Funding Sources screen by clicking the **Institution Data** tab, then clicking **Upload Funding Sources** on the left side of the screen.

The Upload Funding Sources screen displays with notes regarding uploading your funding source data.

Institution	Upload Funding Sources
Maintain Programs	<ul> <li>Please note the following when uploading your funding source data:</li> <li>The file format must match the tab-delimited format in the template that is available for download. Click here for instructions on how to convert an Excel File to the Correct Upload Format</li> <li>Including the column headers is optional. However, they must match those in the template.</li> </ul>
Maintain	<ul> <li>The tab-delimited template format includes the following required columns: Funding Source Project Title, Type of Funding Source, Funding Source Number, Funding Source Organization, Funding Source Start Date, Funding Source End Date, Funding Source Description</li> </ul>
Sources	The Funding Source Project Title and Type of Funding Source are required for each uploaded funding source. The other columns are optional.
Upload Funding	<ul> <li>The Funding Source Project Title must be 200 characters or less.</li> <li>The Type of Funding Source must be one of "F" for Fellowship, "OTH" for Other, "RA" for Research</li> </ul>
Sources	Assistantship, "RG" for Research Grant, "S" for Scholarship, "TA" for Teaching Assistantship, or "TG" for Training Grant.
	<ul> <li>If it is provided, the Funding Source Number must be 20 characters or less.</li> <li>If it is provided, the Funding Source Organization must be one of "NIH" for NIH, "FDN" for Foundation, "NSF" for National Science Foundation, "NUS" for Non-US, "OTH" for Other, "OTHF" for Other Federal, or "UNIV" for University.</li> </ul>
	If the Funding Source Start Date and/or Funding Source End Date are provided, each must be in the form of mm/yyyy or yyyy.
	<ul> <li>If the Funding Source Description is provided, it must be 200 characters or less.</li> <li>The data will be validated upon upload of the file and the results will be presented on the screen.</li> </ul>
	<ul> <li>If a file upload fails for any reason such as incorrect data or incorrect format, none of the records will be saved in IMPACII. You will need to make the corrections and re-upload the file.</li> </ul>
	Data is committed to the database only after all rows in the upload file pass validation.
	Don't have an input file, <del>but would like to downloa</del> d a template that illustrates the file formatory of you can download a template here.

Figure 101: Upload Funding Sources

- The notes section contains information on how to perform a bulk upload. Click the Show More link for instructions on creating and formatting a tab-delimited file, as well as a link to download a tab-separated (TSV) text template file (.txt). Use these tools to create the upload file.
- 2. Once the upload file has been prepared, use the **browse** link to select and upload the file.
- 3. If there are any errors in the upload file, a message will appear above the filename with a link to details of the errors. These errors will need to be corrected before the upload will succeed.

4. If the upload is accepted, a confirmation message will display. The name of the upload file will display in the field above the **Browse** button.

# How Are Training Tables Populated?

This help section contains information to assist with understanding how the fields in each of the Training Tables are populated from the input entered into the various *Research Training Dataset* (RTD) screens in the xTRACT module of Commons. An RTD is part of the reporting requirements of a grant.

xTRACT has various data input screens for trainee data. When you input the required data, xTRACT populates a required form in PDF format behind the scenes.

To see a sample of a completed RTD in PDF format:

- 1. Go to <u>the Data Tables page</u> on grants.nih.gov (https://grants.nih.gov/grants-process/write-application/forms-directory/data-tables)
- 2. Select the latest Forms set.
- 3. Scroll down and click the PDF link in the Instructions and Sample Data Tables Files column

This is the final product of the data that you enter into a subset of xTRACT screens.

This section of the help correlates the data that is entered in xTRACT to where that same data ends up on the RTD PDF.

# Table 1: Census of Participating Departments and Inter-

# departmental Programs

This section explains what parts of the xTRACT module fill Table 1 of the resulting PDFformatted training tables that are in the research training dataset (RTD), which is part of required reporting.

For detailed instructions on every field in the training tables, select the latest forms package here: <u>https://grants.nih.gov/grants-process/write-application/forms-directory/datatables</u>

# **Example Table 1 for NON-T34 Training Grants**

The following table will be located in the PDF of the final RTD after entering xTRACT data. This sample table is for all training grants EXCEPT FOR T34s (Undergraduate Training Grant); see the next section for a T34 example of this table.

Participating Department or Program	Total Faculty	Participating Faculty	Total Predoctorate	Total Pre- doctorates Supported by any HHS Training Award	Total Pre- doctorates with Participating Faculty	Eligible Predoctorates with Participating Faculty	TGE Predoctorates Supported by this Training Grant (Renewals/ Revisions)	Predoctorates Supported by this Training Grant (R90 Only Renewals/ Revisions)
Department of Biochemistry	45	14	38	15	12	6	2	0
Neuroscience Program	32	20	31	20	14	7	4	1
Department of Pharmacology	25	5	30	10	5	3	3	0
Total	102	39	99	45	31	16	9	1
Part II. Postdoctor	ates						TGE	Postdoctorates
Participating Department or Program	Total Faculty	Participating Faculty	Total Post-	Total Postdoctorates Supported by any HHS Training Award	with	Eligible Postdoctorates with Participating Faculty	Postdoctorates Supported by this Training Grant (Renewals/ Revisions)	Supported by this Training Grant (R90 Only Renewals/ Revisions)
Department of Biochemistry	45	14	24	10	9	5	2	0
Neuroscience Program	32	20	27	20	12	5	3	1
Department of	25	5	15	8	5	3	2	0
Pharmacology								

*Figure 102: Table 1 sample. Census of Participating Departments or Interdepartmental Programs* 

The content of **Table 1** is populated with data pulled from the *Participating Department/Programs* component (in left sidebar of xTRACT) of the *RTD* section. Depending on the type of application, this table may or may not be used, or only part of the table may be used. Refer to the <u>Introduction to Data Tables</u> document for specific information.

When working on an RTD, click on *Participating Departments/Programs* from the left menu.

Home Admin Institution Profile eRA Partners Non-Research	Personal Profile Status ASSIST Prior Approva	al RPPR xTrain xTRACT Admin Supp
xTRACT Info New Applications	Training Grants Persons Institution Data	
Training Grants RTD - Basic Information Participating Departments / Programs Training Support &	Prepare Research Training Dataset (RTL RTD 4T32AA123456-15 Interdiciplinary Alcohol Re PD/PI Nightingale, Florence Basic Information (?)	
Summary Participating Faculty		
Participating Trainees		
Program Statistics		
Applicants and Entrants		
Appointments		
Preview PDF		

Figure 103: Participating Departments/Programs section of RTD

The Participating Departments and Programs screen will show the table of the current departments and programs. This table is the source of the names of the departments or programs in the first column of **Table 1**.

To add a partner organization, click the **Add Partner Organization** button above the table.

If you need to add another department or program, select the **Add Participating Departments or Programs** button above the table.

Once the departments and programs are populated into the table, click the **end** threedot ellipsis button and select **Edit Census** to add or change participant totals.

Due to instances where some faculty may serve in more than one department or program, the *Total* for the "*Total Faculty*" and the "*Participating Faculty*" columns may not be the sum of the individual department and program breakdown. This applies to both the *Predoctorates* and *Postdoctorates* tables. These figures are not calculated by the system, and must be entered in the *Training Support & Summary* section as outlined below. Select **Training Support & Summary** from the left menu, and, in the *Census Totals* pane, select the **Edit** button.

RTD	< Back to search results			
Application Details	Prepare Research Training Dataset (RTD) for New App	lication		
Participating Departments / Programs	New RTD 12498 - Exploring the Effects of Long-Term Radiation Exposure in	PD/PI Curie, Marie	Institution UNIVERSITY OF PARIS	
Training Support & Summary	Nearby Inhabitants			
Participating Faculty	Training Support & Summary 😮			
Participating Students	> Summary Statistics			
Applicants and Entrants	> Institutional Training Support Detail			
Preview PDF	,			
→ Finalize RTD	✓ Census Totals			
	Faculty			
	Total	0		
	Participating Please provide numbers for unique faculty members across the pa	0 rticipating departments ar	d interdepartmental programs.	
				😰 Edit
	Pre-doc			
	Total		0	
	Supported by any HHS Training Award		0	
	Total Predoctorates with Participating Faculty		0	
	Eligible Students with Participating Faculty		0	_
	TGE Predocs Supported by this Training Grant		0	
	Post-doc			
	Total		0	
	Supported by any HHS Training Award		0	
	Total Postdoctorates with Participating Faculty		0	
	Eligible Postdocs with Participating Faculty		0	
	TGE Postdocs Supported by this Training Grant		0	

Figure 104: Faculty section of Training Support & Summary section

The *Faculty Census Totals* pop-up window will open. In this window, enter the number of *unique* individuals for the *Total* and *Participating* faculty. Click the **Save** button to update the table.

Faculty Census Totals		×
Total 0		
Participating		
	Cancel	Save

Figure 105: Faculty Census Totals window

These totals will update to the **Total** field for the first two columns (*Total Faculty, Participating Faculty*) for **Part I** and **Part II** of **Table 1**.

# **Example Table 1 for T34 Training Grants**

T34s, or Undergraduate Training Grants, have undergraduate participants rather than Predoctoral or Postdoctoral, so column headings and other labels that refer to participants list "Undergraduates" instead of Postdoc/Predoc.

Participating Department/Division or Program	Total Full- Time Faculty	Full-Time Participating Faculty	Total Full-Time Undergraduates	Training Grant Eligible (TGE) Full-Time Undergraduates	Total Full-Time Undergraduates Supported by any Training Award	Full-Time Undergraduates Supported by this Training Grant (Only Renewals/ Revisions)
Biology	15	10	300	200	3	3
Chemistry	10	8	100	75	3	3
Physics	8	3	50	25	2	0
Psychology & Neuroscience	12	9	150	100	2	2
Total	45	30	600	400	10	8

*Figure 106: Sample Table 1: Census of Participating Departments or Interdepartmental Programs* 

# **Table 2: Participating Faculty Members**

This section explains what parts of the xTRACT module fill Table 2 of the training tables.

For detailed instructions on every field in the training tables, select the latest forms package here: <u>https://grants.nih.gov/grants-process/write-application/forms-directory/data-tables</u>

## **Example Table 2 for NON-T34 Training Grants**

This sample table is for all training grants EXCEPT FOR T34s (Undergraduate Training Grant); see the next section for a T34 example of this table.

Name	Degree(s)	Rank	Primary Department or Program	Research Interest	Training Role	Pre- doctorates In Training	Pre- doctorates Graduated	Predoctorates Continued in Research or Related Careers	Post- doctorates In Training	Post- doctorates Completed Training	Postdoctorate Continued in Research or Related Careers
Abrams- Johnson, Jane	PhD	Asst. Prof.	Pharmacology	Regulation of Synthesis of Biogenic Amines	Preceptor Other Comm	1	2	2	1	0	0
Jones, Lisa S.	PhD	Res. Asst. Prof.	Biochemistry	Protein Structure, Folding, and Immunogenicity	Preceptor Exec Comm	3	3	3	4	2	2
Sandoz, Miguel J.	MD, PhD	Assoc. Prof.	Neuroscience	Developmental Genetics in Drosophila	Preceptor	4	6	5	4	8	6
Thomas, James C.	PhD	Prof.	Biochemistry	Molecular and Genetic Analysis of RNA Viruses	PD/PI	7	10	9	8	15	14
lbrahim, Parker	DrPH	Prof.	Population Health	Molecular Basis of Health Disparities	Preceptor	5	8	8	4	4	4
Part II. Pa	rticipating	Faculty	Members at I	ortnor Organiza	diama (Dest						
			monito de l	artifier Organiza	tions (Partr	nership Prog	rams)				
Name	Degree(s	) Ran	Prima	ry Research		Bro	Pre- doctorates			Post- doctorates Completed Training	Postdoctorate Continued in Research or Related Careers
Smith,	Degree(s	Asst. Prof.	Prima k Departme	Medical Devices for	Training Role	Pre- doctorates In Training	Pre- doctorates	Continued in Research or Related	Post- doctorates	doctorates Completed	Continued in Research or Related
Smith, Quinn A. Johnson,		Asst.	k Prima Departme Progra Partnershi University (Bioengine	Y nt or m Research Interest Devices for Disease Detection Neuro- immunologi	Training Role	Pre- doctorates In Training r 2	Pre- doctorates Graduated	Continued in Research or Related Careers	Post- doctorates In Training	doctorates Completed Training	Continued in Research or Related Careers
Name Smith, Quinn A. Johnson, River J. Rodriguez Leticia M.	PhD PhD	Asst. Prof. Res. A	k Prima Departme Progra Partnershij University (Bioengine sst. Partnershij (Neuroscie Partnershij (Neuroscie	y nt or m Medical Devices fo Disease Detection Detection Detection Chronic Disease	Training Role	Pre- doctorates In Training r 2 r 2	Pre- doctorates Graduated	Continued in Research or Related Careers	Post- doctorates In Training 2	doctorates Completed Training 1	Continued in Research or Related Careers

Figure 107: Sample Table 2: Participating Faculty Members for NON-T34 grants

The content in *Table 2* is populated with data from the *Participating Faculty* section under the RTD. This section shows *Participating Faculty Members*.

RTD	< Back to search results	Faculty Member				
Application Details	Prepare Research T	Jones, Janine L.				
Participating Departments / Programs	New RTD Undergraduate 16102 - Test T34 Applica			Institution INIVERSITY OF		
Training Support & Summary	Mack, Jessie R.					
Participating Faculty Participating Students	Filter Table	4 Results		★ 1 of 1 ~ >		
Preview PDF	Person Name 🔺	Commons User ID 🗘	Person ID ≑	Email 🌲		
→ Finalize RTD	Jones, Janine L.	JONES	11827666	eRATest@mail.nih.gov		
	Ehlers, Roger G.	EHLER	12561870	eRATest@mail.nih.gov		

Figure 108: The Participating Faculty data populates Table 2.

The **Name** column in *Table 2* is populated with the names in the **Person Name** column of participating faculty members.

The remaining information for *Table 2* is populated with data from the *Participating Faculty Detail* screen which is displayed when you click a faculty member's linked name.

Prepare Research Training Dataset (H	RTD) for New Application		
New RTD 12498 - Exploring the Effects of Long-Term Rad Nearby Inhabitants	PD/PI diation Exposure in Curie, Marie	Institution UNIVERSITY OF PARIS	
Participating Faculty Details ?			
Sklodowska, Salomea Commons User ID SKLODOWSKAS Primary Department or Program None	Email eRATest@mail.nih.gov Research Interest None	Rank None Training Role(s) None	<b>E</b> dit
> Faculty Degree			Open All Sections
> Research Support			
> Mentoring Record			

Figure 109: Participating Faculty Details screen

The **Degree(s)** column of Table 2 pulls information from the *Faculty Degree* section. The degrees that are checked in the *Include in RTD* column will be included in Table 2.

The **Rank**, **Primary Department or Program**, **Research Interest**, and **Training Role** information of Table 2 is pulled from the *Faculty Member Data* section.

All of the **Mentoring Record** numbers are pulled from the *Mentoring Record* section.

## **Example Table 2 for T34 Training Grants**

T34s, or Undergraduate Training Grants, have undergraduate participants rather than Predoctoral or Postdoctoral, so column headings and other labels that refer to participants list "Undergraduates" instead of Postdoc/Predoc. Also, columns listing "degree" are omitted.

			Applicant Organi	zation				
Name	Degree(s)	Rank	Primary	Research Interest	Training Role	Undergraduates In Training	Undergraduates Graduated	Undergraduates Continued in Biomedical, Research focused Higher Degree Programs
Abrams- Johnson, Jane	Ph.D., MPH	Asst. Prof.	Pharmacology		Preceptor PD/PI	1	4	2
Jones, Lisa S	.Ph.D.	Res. Asst. Prof.	Biochemistry	Protein Structure, Folding, and Immunogenicity	Preceptor	3	3	3
Sandoz, Miguel J.	M.D., Ph.D.	Assoc. Prof.	Neuroscience	Developmental Genetics in Drosophila	Preceptor Exec. Comm.	4	6	5
Thomas, James C.	Ph.D.	Prof.	Biochemistry	Molecular and Genetic Analysis of RNA Viruses	Other Comm.	7	10	9
			culty Members t Other Organizati	ons (Partnership P	rograms)			Undergraduates
Name	Degree(s)	Rank	Organization (Department)	Research Interest	Training Role	Undergraduates In Training	Undergraduates Graduated	Continued in Biomedical, Research focused Higher Degree Programs
Smith, Quinn A.	Ph.D.,	Asst. Prof.	Partnership University (Bioengineering)	Medical Devices for Disease Detection	SRE Mentor	2	3	3
Johnson, River J.	Ph.D.	Res. Asst. Prof.	Partnership University (Neuroscience)	Neuro-immunology	SRE Mentor	7	10	9

*Figure 110: Sample Table 2: Participating Faculty Members for T34 grants* 

# Table 3: Federal Organizational Research Training Grant andRelated Support Available to Participating Faculty Members

This section explains what parts of the xTRACT module fill Table 3 of the training tables.

For detailed instructions on every field in the training tables, select the latest forms package here: <u>https://grants.nih.gov/grants-process/write-application/forms-directory/data-tables</u>

# **Example Table 3 for NON-T34 Training Grants**

This sample table is for all training grants EXCEPT FOR T34s (Undergraduate Training Grant); see the next section for a T34 example of this table.

Grant Title	Award Number	Project Period	PD/PI		Number of Pos	Number of Participating Faculty	Names of Overlapping	
Grant Fille	Award Number Pro				Postdoctoral	Shortterm	(Number Overlapping)	Faculty
Predoctoral Training in Basic Neuroscience	T32NS123456- 19	07/1998 - 06/2018	Pevensie, Lucy; Pole, Jill	8	6	2	76(1)	Lewis
Medical Scientist Training Program	T32GS123456- 28	07/1987 - 06/2017	Scrubb, Eustace; Digory, Kirke	20	13	4	125(1)	Lewis
Training Program in the Neurobiology of Substance Use and Abuse	T32DA123456- 05	07/2011 - 06/2017	Plummer, Polly; Mouse, Reepicheep	4	3		53(3)	Hinny White Faun
Total				32	22	6		

Figure 111: Sample Table 3. Federal Organizational Research Training Grants and Related Support Available to Participating Faculty Members

The information in Table 3 is extracted from information in the *Training Support & Summary* section found in the xTRACT module in Commons. Select *Training Support and Summary* from the left menu.

Home Admin Institution Profile eRA Partners Non-Research	Personal Profile Status ASSIST Prior Ap	proval RPPR xTrain xTRACT Admin Supp
xTRACT Info New Applications	Training Grants Persons Institution Data	
Training Grants	Prepare Research Training Dataset RTD 4T32AA123456-15 Interdiciplinary Alcoh	
RTD <b>→</b> Basic Information	PD/PI Nightingale, Florence	
Participating Departments / Programs	Basic Information @	Back to Training Grant Search Results
Training Support & Summary		
Participating Faculty		
Participating Trainees		
Program Statistics		
Applicants and Entrants		
Appointments		
Preview PDF		

Figure 112: Training Support & Summary screen

The corresponding screen will open. It contains the *Summary Statistics*, *Institutional Training Support Detail*, as well as the *Census* section. The first two sections are used for Table 3.

The information in the first four columns of Table 3 are populated with information from the *Institutional Training Support Detail* section.

The Number of Positions Totals in Table 3 are pulled from the Summary Statistics totals.

These totals are derived from the individual grant records listed in the *Institutional Training Support Detail.* 

**NOTE:** If not all training support is listed on the *Training Support & Summary* screen, click on the **Add Institutional Training Support** button to add more. Refer to the related help information here; <u>Institutional Training Support</u>.

The information for each source of support can be edited by clicking the hyperlinked grant title.

Clicking the **Edit** button for a grant in that list will open up the detail screen for that grant.

In the *Detail* screen, select **Edit** in the *Number of Trainee Positions* section to make updates to the trainee position information including *Number of Participating Faculty*.

The number of trainee positions and overlapping faculty, for this grant, are then displayed in the **Number of Positions** and the **Number of Participating Faculty (Number Overlapping)** columns in Table 3 for that grant.

The last column of Table 3 is populated with the information in the *Overlapping Faculty* section of the individual grant's *Institutional Training Support Detail*. Only the last name of any overlapping faculty is listed. If any listed faculty should *not* be categorized as overlapping, use the **I Remove** button to take them off of this list.

If there are additional faculty who are participating and are also on the Institutional Training Grant, select the **Add Overlapping Faculty** button from this section to add those individuals.

The last names of the overlapping faculty will appear in the last column of Table 3 and the number of overlapping faculty will appear in parentheses after the total number of participating faculty in the preceding column.

# **Example Table 3 for T34 Training Grants**

T34s, or Undergraduate Training Grants, have undergraduate participants rather than Predoctoral or Postdoctoral, so column headings and other labels that refer to participants list "Undergraduates" instead of PostDoc/Predoc.

Grant Title	Award Number	Project Start and End Dates	PD/PI	Number of Undergraduate Positions	Number of Participating Faculty
ESTEEMED Project	R25 EB123456-12	05/2021-04/2026	Smith, Quinn A.	5	12
Bridges to the Baccalaureate	T34 GM242609-03	08/2022 - 07/2027	Johnson, River J.	8	16
HBCU UP	NSF 2200650	03/2024 - 02/2027	Wilson, Jordan T.	10	15

Figure 113: Sample Table 3 for T34s. Federal Organizational Research Training Grants and Related Support Available to Participating Faculty Members

# **Table 4. Research Support of Participating Faculty Members**

This section explains what parts of the xTRACT module fill Table 4 of the training tables.

For detailed instructions on every field in the training tables, select the latest forms package here: <u>https://grants.nih.gov/grants-process/write-application/forms-directory/data-tables</u>

The sample tables below are for all types of grants (T34 and non-T34).

Faculty Member	Funding Source	6	Grant Numbe	r	Role on Project		Grant Title	Project Period	Current E Period Dire	
lones, Janine L.	NIH	1 R35 (	GM76259-01	Ρ	PD/PI	Structu Recept	re and Function of Acetylcholine ors	06/2021-05/202	6 :	275,00
Chow, Xavier	NIH	5 K08 /	AI00091-03	P	PD/PI	Purific: Recept	ation & Identification of ors	11/2013-11/202	×4 \$	140,00
Ehlers, Roger G.	Univ			Ρ	PD/PI	Univers	sity start-up funds	08/2021-07/202	4 \$	350,00
/lack, Jessie R.	Fdn			Ρ	PD/PI	Contro	l of Angiogenesis	03/2018-02/202	3 \$	190,00
/lack, Jessie R.	NSF	PCM 8	0-12935	Ρ	PD/PI	Cell Cu	lture Center	12/2019-11/202	4 \$	185,00
lack, Jessie R.	NIH	1 P01 I	HL71802-05	P	Project Pl		oject 4: Oncogenic Kit Receptor ng in vivo	10/201909/202	4 \$	165,00
Smith, James P.	None									
achary, Andrew	NIH	1 U01 /	AI28507-02	Ρ	PD/PI		Monoclonal Antibodies as a y for Staphylococcal Enterotoxin	07/2022-06/202	7 \$1	200,00
Member Part II (As applicat Faculty Member		-	on Funding Source	Grant Nu		Role on Project	Grant Title	Project Period	Current Budget Period Direct Costs	
Part II (As applicat		ation	Funding	Grant Nu 1 R01 AG76259	umber		Grant Title Impact on Blood-Based Biomarker Detection of Alzheimer's in Primary Care Patients	Period	Budget Period	
Part II (As applicat	Organiza	ation	Funding Source	1 R01	39-01 P	Project	Impact on Blood-Based Biomarker Detection of Alzheimer's in Primary Care	Period 06/2024- 05/2029	Budget Period Direct Costs	
Part II (As applicat Faculty Member Davis, Drew P.	Partnership University Partnership	ation	Funding Source	1 R01 AG76259 5 R00	59-01 P	Project PD/PI	Impact on Blood-Based Biomarker Detection of Alzheimer's in Primary Care Patients Neuroscientific Exploration of	Period           06/2024- 05/2029           12/2023- 11/2026           07/2023-	Budget Period Direct Costs \$230,000	
Part II (As applicat Faculty Member Davis, Drew P. Jenkins, Shaina J.	Partnership University Partnership University Partnership	ation	Funding Source NIH	1 R01 AG76259 5 R00 MD00091 1 DP1	11-03 P	Project PD/PI D/PI	Impact on Blood-Based Biomarker Detection of Alzheimer's in Primary Care Patients Neuroscientific Exploration of Cultural Protective Factors Mitigating substance abuse in health disparity populations: intersections of neuroscience	Period           06/2024- 05/2029           12/2023- 11/2026           07/2023- 06/2028           12/2023	Budget Period Direct Costs \$230,000 \$160,000	

*Figure 114: Sample Table 4. Active Research Support of Participating Faculty Members* 

The content in *Table 2* is populated with data from the *Participating Faculty* selection under RTD. This selection will open up to *Participating Faculty Members* and will display a hitlist of members.

RTD	< Back to search results			Faculty Member
Application Details	Prepare Research Tr	raining Dataset (RTD)	for New App	Jones, Janine L.
Participating Departments / Programs	New RTD Undergraduate F 16102 - Test T34 Applicat			Institution UNIVERSITY OF Ehlers, Roger G.
Training Support & Summary	Participating Facult	y Members 😧		Mack, Jessie R.
Participating Faculty Participating Students	Filter Table	4 Results		★ ■ < 1 of 1 × >
Preview PDF	Person Name 🔺	Commons User ID 🗘	Person ID 🌻	Email 🗘
- Finaliza PTD	Jones, Janine L.	JONES	11827666	eRATest@mail.nih.gov
→ Finalize RTD	Ehlers, Roger G.	EHLER	12561870	eRATest@mail.nih.gov

Figure 115: The Participating Faculty data populates Table 2.

The **Faculty Member** column in Table 4 is populated from the **Person Name** information in the initial table of results on the *Participating Faculty* screen; see *How Do I Manage Participating Faculty Members (New Application)?* on page 38

The information for the additional columns in Table 4 can be viewed by clicking a faculty member's linked name. This opens up the *Participating Faculty Detail* for that person; see *Participating Faculty Detail (New Application)* on page 43.

Expand the **Research Support** section to see the relevant data. The funding may be *NIH* and Other Agency Sources of Support on Record or Other Sources of Support.

This is the mapping for *NIH and Other Agency Sources of Support on Record* which is the first table in the **Research Support** section:

NIH & Other Agency	to	Table 4
Grant	>>	Grant Number
Role on Project or Subproject	>>	Role on Project
Project Title	>>	Grant Title
Project Period	>>	Project Period
Current Budget Period Direct Costs	>>	Current Year Direct Costs

This is the mapping for *Other Sources of Support* which is the second table in the **Research Support** section:

Other Sources	to	Table 4
Funding Source	>>	Funding Source
Support Type	>>	[not used]
Project number (if supplied)	>>	Grant Number
Project Role	>>	Role on Project
Project Title	>>	Grant Title
Project Period	>>	Project Period
Current Budget Period Direct Costs	>>	Current Year Direct Costs

# Table 5 (A & B): Publications of Those in Training

This section explains what parts of the xTRACT module fill Table 5 of the training tables.

For detailed instructions on every field in the training tables, select the latest forms package here: <u>https://grants.nih.gov/grants-process/write-application/forms-directory/data-tables</u>

# **Example Table 5A / 5B for NON-T34 Training Grants**

The sample tables below are for all training grants EXCEPT FOR T34s (Undergraduate Training Grant); see the next section for T34 examples of this table.

Tables 5A and 5B are used to document the publications of both Pre-doctorate (5A) and Post-doctorate (5B) trainees who are or who have been supported by the grant.

Trainee Name	Faculty Member	Past or Current Trainee	Training Period	Publication (Authors, Year, Title, Journal, Volume, Inclusive Pages)
Pennix,	Chu, Jeremy* K.			Pennix, O.C.M., Jordan A., and Chu, J., 2015 Sympathetic Noradrenergic Innervation of Drosophila, Genetics185: 1100-1190.
Olufemi C.	Jordan, Angel C.	Past	2008-2016	Howard, C.G., Pennix, O.C., Jordan A., and Chu, J., 2021.20172017, Repeated Sequences in Drosophila, J. Mol Biol, 242:503-510
Bar, Daniel	Collins, Francis S.	Past	2015-2020	Bar DZ, Atkatsh K, Tavarez U, Erdos MR, Gruenbaum Y, Collins FS., 2016, Biotinylation b antibody recognition- A novel method for proximity labeling. BioRxiv 069187 [Preprint
	Berg, Lawrence P.	Past	2016-2021	Miter, M.H., Owens, R., <b>Thompson, P</b> ., and Berg, L., 2021, Insulin Treatment of Diabeti Rats, J Comp Neurol, 373:350-378.
Samuels, Janine A.	Peters, Mark Q.	Current	2020-2022	No Publications: Left program
Wand, Dennis R.	Layback, Sally G.	Current	2022-Present	No Publications: Left Program

*Figure 116: Sample Table 5A. Publications of Trainees Supported by this Program: Predoctoral* 

Faculty Member	Trainee Name	Past or Current Trainee	Training Period	Publication (Authors, Year, Title, Journal, Volume, Inclusive Pages)
Woodhull, Vitoria C.	Wilder, Laura I.	Past	2005 - 2007	Wilder LI, Maracle J, Manz F, Kinross J, Kiplinger JH, Chiu TK, and Zábojnick J, 2007, Age of diagnosis of squamous cell subdermal melanoma and early           Wilder LJ, Maře JA, Alheno F, Zhudang L, and Lexingworth J, 2006.         Prevention : a publication of the Prevention : 15:1234-5
Woodhull, Vitoria C.	Wilder, Laura I.	Past	2005 - 2007	Epidemiology and pathogenisis of bone cancer, Seminars in radition oncology, 13:54-72 of esophageal cancer., Seminars in
Warner, Daniel S	Miller, F.M.	Current	2015 - Present	xer GV, Steele M, Wolowitz HB, and Blanca ∋ in Inflammatory Disease., Arthritis ention : a publication of the Instititute for Arthritis Prevention and Treatment, 17:451-75

*Figure 117: Sample Table 5B. Publications of Trainees Supported by this Program: Postdoctoral* 

The information that is populated into Tables 5A and 5B is drawn from data in the *Participating Trainees* section accessed from the RTD menu.

RACT Info New App	lications Training	Grants Persons Instit	tution Data				
Training Grants	Prepare Resea	rch Training Dataset (R	TD) for Renewa	al			
RTD-	RTD	5K12HD123456-14	Center for Mole	ecular & Cellular	Studies of Ped Di	sease	
Basic Information	PD/PI	Travolta, John					
Participating Departments / Programs	Participat	ing Trainees 🛛	J			Showing '	I - 10 of total 1
Training Support &				Sho	N 10 🔻 per	r page	1 2 »
Summary	Person Name	Commons User ID 🖨	Person ID 🖨	Trainee Type	Start	End Date 🚔	Action
Participating Faculty	Miller,	FORTUNA_M	########	Post-doc	2015-07-01	2017-11-01	Edit
Participating	Fortuna						Remove
Students Participating Trainees	Totsie, Rosalie	TOTSIE_ROSE	#########	Pre-doc	2015-07-01	2017-11-01	Edit Remove
Applicants and Entrants	Barbarino, Vincent	BARBARINO_V	########	Post-doc	2011-07-01	2015-11-01	Edit Remove
Appointments	Kotter,	KOTTER_GABE	#########	Pre-doc	2008-07-01	2014-06-01	Edit
Preview PDF	Gabriel						Remove
Finalize RTD	Horshack, Arnold	HORSHACK_A	########	Post-doc	2010-04-01	2011-11-01	Edit Remove
	Washington	WASHINGTON F	#########	Post-doc	2008-03-01	2009-11-01	Edit

Figure 118: Participating Trainees section of RTD

The doctoral designation in the **Trainee Type** column will dictate the table into which the data is populated.

- The data for *Pre-doc* trainees will populate into Table 5A
- The data for *Post-doc* trainees will populate to Table 5B.

#### Data Mapping from the *Participating Trainees* section to Table 5A/B.

Participating Trainees	to	Table 5A/B
Person Name	>>	Trainee Name
In Training Data (see below)	>>	Past or Current Trainee
Start Date and End Date information defines	>>	Training Period
Publications in Participating Trainee Detail (see	>>	Faculty Member

Participating Trainees	to	Table 5A/B
below)		
<b>Publications</b> in <i>Participating Trainee Detail</i> (see below)	>>	Publication

#### Past or Current Trainee

- Click on the **Edit** button in the **Action** column of the *Participating Trainees* table for a trainee. This opens up the detail view for the trainee.
- Expand the *In Training Data* area. The first field, **"In Training:"** will indicate if the trainee is currently in training or not. A "Yes" = *Current*, while a "No" = *Past*.

#### **Faculty Member and Publication Information**

- In the *Participating Trainees* table, click a trainee's hyperlinked name. This opens up the detail view for the trainee.
- Expand the *Publications* area. The **Faculty Member** and **Publications...** columns of Tables 5A and 5B, are populated with the data residing in the *Publications* area of the Trainee Detail.
- From this section, the *Authors, Year, Title, Journal, Volume,* and *Inclusive Pages* information populates the last column of the tables (**Publication...**).
- The faculty member listed for the publication populates the **Faculty Member** column of the tables for the row corresponding to the publication information.
- The trainee's name is typically shown in **bold** in the list of contributing authors. Depending on the source of the information (NCBI or other), the information in this section may vary slightly in format. The entries may be edited to select the name of the trainee to be shown in bold.

If additional publications should be listed, use the **Add Publication** button to perform that function.

If an existing publication should *not* be listed, use the **I Remove** button to remove it.

Refer to information in the <u>Publications</u> section of the *Trainee Detail* help regarding this process.

# **Example Table 5D for T34 Training Grants**

T34s, or Undergraduate Training Grants, have undergraduate participants rather than Predoctoral or Postdoctoral, so column headings and other labels that refer to participants list "Undergraduates" instead of Postdoc/Predoc.

Trainee Name	Faculty Member	Past or Current Trainee	Training Period	Publication (Authors, Year, Title, Journal, Volume, Inclusive Pages)
Samuels.				Bernard J., Samuels, D. and Chu, J., 2020, Molecular Analysis of RNA Viruses, Molec Biol Cell, 11:12-18.
Dennis R.	Chu, Jeremy K.	Past	2016-2020	Bernard J., Samuels, D. and Chu, J., 2020, Molecular Analysis of RNA Viruses, Molec Biol Cell, 11:12-18. Samuels, D., Bernard, J., and Chu, J., 2021, Comparative sequences of RNA Viruses [abstract]. ABRCMS 2021, Nov 10-13, virtual.
Kim, Suni L.	Brown, Bernice W.	Past	2017 - 2022	Mahomes, R., <b>Kim, S.</b> , and Brown, B., 2023, Sympathetic Noradrenergic Innervation of Drosophila, J Comp Neurol, 373:350-378.
Chaudhari, Ritu	Chu, Jeremy K.	Current	2021 - Present	Gomes, X., <b>Chaudhari, R.</b> and Chu, J., 2023, Repeated Sequences in Drosophila, Genetics 185: 1100-1190. <b>Chaudhari, R</b> ., Gomes X, and Chu, J., 2023, 3D spatial single-cell -omics in Drosophila [abstract]. NDISTEM Conference (SACNAS), 2023, Portland, OR.
Jenkins, Layla L.	Berg, Lauren P.	Current	2022-Present	Jenkins, LL. and Berg, L., Methylation changes in early embryonic genes in cancer [abstract] In: Proceedings of the 97th Annual Meeting of the American Association for Cancer Research 2023 Apr 1–5; Washington, DC.
Thomas, Patricia T.	Diaz, Manuel R.	Current	2023 - Present	No publications: new entrant.

Figure 119: Sample Table 5D. Publications of Those in Training: Undergraduate

# Table 6 (A & B): Applicants, Entrants, and their Characteristics for

# the Past Five Years

*Table 6* of the research training dataset (RTD) consists of four sub-tables that detail statistics regarding the number and characteristics of entrants into the training program funded by the grant for the last five years. Use xTRACT to populate the forms and create the final PDF of completed forms.

This section explains what parts of the xTRACT module fill Table 6 of the training tables.

**NOTE:** T34 Undergraduate Training Grants lack Table 6, which has to do with Predoctoral and Postdoctoral participants, because it is not relevant to T34s.

For detailed instructions on every field in the training tables, select the latest forms package here: <u>https://grants.nih.gov/grants-process/write-application/forms-directory/data-tables</u>

Table 6 consists of:

- Table 6A Part I, Predoctoral Counts
- Table 6A Part II, Predoctoral Characteristics
- Table 6B Part I, Postdoctoral Counts
- Table 6B Part II, Postdoctoral Characteristics

#### Before Entering Applicant and Entrant Data in xTRACT

Upon clicking Applicants and Entrants in the RTD menu, you may be prompted to enter the most recently completed academic year. Depending on the grant cycle, you can choose to report by academic or grant year, but always begin with the most recently completed year. Enter this and click **Submit**, at which time the links for Pre-Doc Applicants and Entrants and Post-Doc Applicants and Entrants become enabled.

RTD	< Back to search results
Application Details	Prepare Research Training Dataset (RTD) for New Application
Participating Departments / Programs	New RTD         PD/PI         Institution           16004 - Long-Term Effects of Radium Exposure on         Robinson, Donita L         UNIV OF NORTH CAROLINA CHAPEL HILL
Training Support & Summary	Nearby Inhabitants
Participating Faculty	Applicants and Entrants 😧
Participating Students	Start year of the most recently completed academic year *
Applicants and Entrants	
Preview PDF	Please provide a valid start year
→ Finalize RTD	Submit
	The Pre-doc and Post-doc data may be edited via the links below, once the Start of the most recently completed academic year has been provided. Edit Pre-Doc Applicants and Entrants Edit Post-Doc Applicants and Entrants

Applicants and Entrants screen showing year selection

Also, make sure there are participating departments or programs entered in the Participating Departments/Programs section of the RTD menu, as these will be associated with the counts that you enter. For details of the fields shown in this section, see the following topics:

Predoctoral Applicant and Entrant Counts and Characteristics

Postdoctoral Applicant and Entrant Counts and Characteristics

# Table 6A: Training Program Candidates, Entrants, and Their Characteristics for the Past Five Years: Predoctoral

To populate Table 6A: Training Program Candidates, Entrants, and Their Characteristics for the Past Five Years: Predoctoral in the RTD, navigate to the RTD menu in xTRACT, and go to the Applicants and Entrants section.

Table 6A. Training Program (	Candidates, Entrants,	and Their Characteris	tics for the Past Five	Years: Predoctoral
Counts and Characteristics Most Recently Completed Year: 2023- 2024	Total Training Program Candidates - Applied	Total Training Program Candidates - Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support
Neuroscience Center	222	200	20	2
Michigan Neuroscience Institute	222	200	20	2
Total	444	400	40	4

#### Figure 120: Sample Table 6A:

In xTRACT, click the **Edit Pre-Doc Applicants and Entrants** button, then enter data into the **Counts: Department or Program** panel that appears, which subsequently populates Table 6A in the RTD. The totals you enter are used to populate the totals for last five years of the grant and to calculate the mean for those years.

# Table 6B: Training Program Candidates, Entrants, and Their Char-

# acteristics for the Past Five Years: Postdoctoral

To populate Table 6B Training Program Candidates, Entrants, and Their Characteristics for the Past Five Years: Postdoctoral in the RTD, navigate to the RTD menu in xTRACT, and go to the Applicants and Entrants section.

Most Recently Completed Year: 2022- 2023	Total Training Program Candidates - Applied	Training Program Candidates – Eligible for Support	New Entrants to the Program		New Appointees to this Grant (Renewal/Revision Applications Only
PhDs	25	15	6	5	4
MDs	4	1	0	0	0
Dual-Degree Holders	3	3	2	2	2
Other Degree Holders	0	0	0	0	0
Total	32	19	8	7	6
	•				
Means Across All Years	Total Training Program Candidates - Applied	Training Program Candidates – Eligible for Support	New Entrants to the Program		New Appointees to this Grant (Renewal/Revision Applications Only
	Program Candidates -	Program Candidates – Eligible for			
PhDs	Program Candidates - Applied	Program Candidates – Eligible for Support	Program	Eligible for Support	(Renewal/Revision Applications Only
PhDs MDs	Program Candidates - Applied 24	Program Candidates – Eligible for Support 14	Program 7	Eligible for Support	(Renewal/Revision Applications Only 4
Means Across All Years PhDs MDs Dual-Degree Holders Other Degree Holders	Program Candidates - Applied 24 4	Program Candidates – Eligible for Support 14	Program 7 0	Eligible for Support 6 0	(Renewal/Revision Applications Only 4 0

Figure 121: Sample Table 6B: Training Program Candidates, Entrants, and Their Characteristics for the Past Five Years: Postdoctoral

In xTRACT, if prompted to enter the most recently completed academic year, enter it and click Submit. Then click the **Edit Post-Doc Applicants and Entrants** button, which prompts for data that subsequently populates Table 6B - Part I Counts table in the RTD. The totals you enter are used to populate the totals for last five years of the grant and to calculate the mean for those years.

# Table 7: Appointments to the Training Grant for Each Year of theCurrent Project Period (Renewal/Revision Applications only)

*Table 7* of the research training dataset (RTD) consists of one table that counts trainees appointed. Use xTRACT to populate the forms and create the final PDF of completed forms. This section explains what parts of the xTRACT module fill Table 8 of the training tables.

# **Example Table 7 for NON-T34 Training Grants**

This sample table is for all training grants EXCEPT FOR T34s (Undergraduate Training Grant); see the next section for a T34 example of this table.

Table 7. Appointments to the Training Grant for Each Year of the Current Project Period (Renewal/Revision Applications
only)

Training Positions	Budget Year 37	Budget Year 38	Budget Year 39	Budget Year 40	Sum of Budget Years
Predoctoral Awarded	22	22	21	21	86
Predoctoral Appointed	23	23	21	0	67
- Predoc: Dual-Degree	1	3	6	5	15
Postdoctoral Awarded	0	0	0	0	0
Postdoctoral Appointed	4	1	1	2	8
- Postdoc: MD or Equivalent	0	3	0	1	4
- Postdoc: PhD or Equivalent	2	3	6	5	16
- Postdoc: DDS, DVM, Other	1	2	2	4	9
- Postdoc: Dual Degree	1	2	3	6	12
Short-term Awarded	0	0	0	0	0
Short-term Appointed	1	4	5	2	12

#### Figure 122: Sample Table 7 in Training Tables

For detailed instructions on every field in the training tables, select the latest forms package here: <u>https://grants.nih.gov/grants-process/write-application/forms-directory/data-</u> tables

To populate Table 7 in the RTD, navigate to the RTD menu in xTRACT, and go to the Appointments section.

Click the Appointments section, and then enter data into the Training Position Awarded and Training Positions Appointed areas that appear. Use the **Edit Appointments** button to change values. The totals you enter are used to populate Table 7.

5T32GM012345-41 Training Prog	ram for Andorian Antennae Cancer	PD/PI Shran, Thylek			
Appointments 😯 raining Positions Awarded					
	Budget Year 37	Budget Year 38	Budget Year 39	Budget Year 40	Sum of Budget Years
Predoctoral Awarded	22	22	21	21	86
Postdoctoral Awarded	0	0	0	0	0
Short-Term Awarded	0	0	0	0	0
	Budget Year 37	Budget Year 38	Budget Year 39	Budget Year 40	Sum of Budget Years
Predoctoral Appointed	Budget Year 37	Budget Year 38	Budget Year 39	Budget Year 40	Sum of Budget Years
Predoctoral Appointed Pre-doc Dual Degree	-	-	-	-	-
	23	23	21	0	67
Pre-doc Dual Degree	23	23	21	0	67
Pre-doc Dual Degree Postdoctoral Appointed	23 1 4	23 3 1	21 6 1	0 5 2	67 15 8
Pre-doc Dual Degree Postdoctoral Appointed Post-doc MD or Equivalent	23 1 4 0	23 3 1 3	21 6 1 0	0 5 2 1	67 15 8 4
Pre-doc Dual Degree Postdoctoral Appointed Post-doc MD or Equivalent Post-doc PhD or Equivalent	23 1 4 0 2	23 3 1 3 3 3	21 6 1 0 6	0 5 2 1 5	67 15 8 4 16

#### Appointments Screen

# **Example Table 7 for T34 Training Grants**

T34s, or Undergraduate Training Grants, have undergraduate participants rather than Predoctoral or Postdoctoral, so only positions awarded, appointed, and those from underrepresented groups are counted.

Table 7. Appointments to the Train	ing Grant for Each Y	ear of the Curre	ent Project Peri	od (Only For Re	enewals)
Training Positions	Budget Year 6	Budget Year 7	Budget Year 8	Budget Year 9	Sum of Budget Years
Predoctoral Awarded	6	6	6	6	24
Positions Appointed	7	6	6	0	19

*Figure 123: Sample Table 7. Appointments to the Training Grant for Each Year of the Current Project Period* 

# Table 8: Program Outcomes (A-C)

*Table 8* consists of three sub-tables detailing the program outcomes for predoctoral and postdoctoral trainees on the grant. This section explains what parts of the xTRACT

module fill Table 8 of the training tables.

For detailed instructions on every field in the training tables, select the latest forms package here: <u>https://grants.nih.gov/grants-process/write-application/forms-directory/data-tables</u>

# **Examples of Table 8 for NON-T34 Training Grants**

The following sample tables are for all training grants EXCEPT FOR T34s (Undergraduate Training Grant); see the bottom of this topic for a T34 example of this table.

Table 8 consists of:

- Table 8A Program Outcomes: Predoctoral
  - ° Part I. Those Appointed to the Training Grant
  - Part II. Recent Graduates
- Table 8B. Program Outcomes: Postdoctoral
  - Part I. Those Appointed to the Training Grant
  - Part II. Recent Graduates
- Table 8C. Program Outcomes: Short-Term

#### Table 8A. Program Outcomes: Predoctoral

For new applications, this table provides information on the effectiveness of the proposed training program.

Trainee	Faculty Member	Start Date	Summary of Support During Training	Terminal Degree(s) Received and Year(s)	Topic of Research Project	Initial Position	Current Position	Subsequen Grant(s)/ Role/Year Awarded
Pennix, Olufemi C.	Chu, Jeremy K. Jordan, Angel C.	09/2008	TY 1: HL T32 TY 2: HL T32 TY 3: HL F30 TY 4: HL F30 TY 5: HL F30 TY 6: Fdn RA	M.D./Ph.D., 2016	The role of Notch in blood vessel maturation	Resident Internal Medicine Emory University Academia Further Training	Assistant Professor Hematology Rutgers University Academia Research-Related	HL F30/PI/2010 HL K23/PI/2018 HL P01/Co- I/2022
Bar, Daniel	Collins, Francis S.	09/2015	TY 1: HL T32 TY 2: HL T32 TY 3: Univ TY 4: Univ TY 5: GM R01	Ph.D. 2020	Methods development for proximity labeling	Scientist I Genentech For-profit Primarily Research		
Thompson, Patricia P.	Berg, Lawrence P.	09/2016	TY1: Univ TY2: HL T32 TY 3: HL T32 TY4: DK R01 TY5: DK R01 TY6: DK R01	Ph.D. 2021	Insulin Treatment of Diabetic Rats	Postdoctoral Fellow Molecular Biology UC San Francisco Academia Further Training	Research Associate Molecular Biology UC San Francisco Academia Primarily Research	HL F32/PI/2020 GM R35/Sta Scientist/202

#### Table 8A. Part I. Those Appointed to the Training Grant

#### Figure 124: Sample Table 8A. Part I

To populate Table 8A Part I in the RTD, navigate to the RTD menu in xTRACT, and go to the Participating Trainees section.

In xTRACT, on the list of Participating Trainees, click each trainee's hyperlinked name in turn, which allows you to edit the data that subsequently populates Table 8A Part I in the RTD.

# Table 8A. Part II. Recent Graduates (Only for New Applications and forPostdoctoral Renewal/Revision Applications Requesting an Expansion forPredoctoral support)

To populate Table 8A Part II in the RTD, navigate to the RTD menu in xTRACT, and go to the Participating Trainees section.

Trainee	Faculty Member	Start Date	Summary of Support During Training	Terminal Degree(s) Received and Year(s)	Topic of Research Project	Initial Position	Current Position	Subsequent Grant(s)/ Role/Year Awarded
Harris, Thomas P.	Trimmer, Blake R.	09/2017		Ph.D. 2023	Src Kinase and Breast Cancer	Postdoctoral Fellow Medicine Boston University Academia Further Training		
Rosenthal, Julia R.	Coates, Robert	09/2018		Ph.D. 2023	Modulation of host cellular responses	Medical Student Medicine Northwestern University Academia Further Training		

Figure 125: Sample Table 8A. Part II

In xTRACT, on the list of Participating Trainees, click each trainee's hyperlinked name in turn, which allows you to edit the data that subsequently populates Table 8A Part II in the RTD.

#### Table 8A. Part III. Program Statistics

To populate Table 8A Part III in the RTD, navigate to the RTD menu in xTRACT, and go to the **Program Statistics** section.

Part III. Program Statistics	
Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the PhD	Average Time to PhD for Trainees in the Last 10 Years
50.2%	5.25 years

Figure 126: Sample Table 8A. Part III

The **Program Statistics** area prompts for data that subsequently populates Table 8A Part III in the RTD.

RTD	< Back to search results				
Participating Departments / Programs	Prepare Research Training Dataset (RTD) f	or Renewal			
Training Support & Summary	RTD 5T32ES123456-25 Long-Term Effects of Radium Exposure on Nearby Inhabitants	PD/PI Curie, Marie (Contact)			
Participating Faculty					
Participating Trainees	Program Statistics ?				
Program Statistics	* Required Fields				
Applicants and Entrants			Copy from Prior RTD   Last copied 26-Sep-2023 0 (RPPR)	0:52:55, from 5T32AA007	7573-25
Appointments	Are program statistics applicable for this reporting	g period?	Percentage of Trainees Entering Graduate School	ol 10 Years Ago Who	
Preview PDF	<ul> <li>Applicable</li> <li>Not Applicable</li> </ul>		Completed the Ph.D. *	0.0	%
→ Finalize RTD				0.0	70
			Average Time to Ph.D. for Trainees in the Last 10	0 Years *	
				0.0	Year(s)
				Clear	Save
				Clear	Jave

Program Statistics screen (

#### Table 8B. Program Outcomes: Postdoctoral

For new applications, this table provides information on the effectiveness of the proposed training program. For renewal applications, this table provides detailed information about how postdoctoral training positions are used. It also enables evaluation of the effectiveness of the supported training program in achieving the training objectives.

#### Table 8B. Part I. Those Appointed to the Training Grant

To populate Table 8B Part I in the RTD, navigate to the RTD menu in xTRACT, and go to the Participating Trainee section.

	Doctoral	Franktin	Chart .	Summary of	Degree(s) Resulting	Topic of			Subsequent
Trainee	Degree(s) and Year(s)	Faculty Member	Start Date	Support During Training		Research	Initial Position	Current Position	Grant(s)/Role Year Awarded
Thomas, Patrick D.	Ph.D. 2014	Berg, Lawrence P.	07/2015	TY 1: <b>HL T32</b> TY 2: <b>HL T32</b> TY 3: CA R01 TY 4: CA R01 K99 TY5: CA K99	None	Uterine cancer and developmental biology	Staff Scientist Radiology MGH Academia Primarily Research		CA K99/PI/202 CA R00/PI/202
Taylor, Doris W.		Easygai, Franchesc a	07/2019	TY 1: <b>HL T32</b> TY 2: HL T32 TY 3: HL R01	MPH 2021	Disparities in cardiovascular disease	Internal Medicine Columbia Academia Primarily	Hematology	DK K08/PI/202 DK R01/ Facul Collaborator/2 4

Figure 127: Sample Table 8B. Part I

In xTRACT, on the list of Participating Trainees, click each trainee's linked name in turn, which allows you to edit the data that subsequently populates Table 8B Part I in the RTD.

# Table 8B. Part II. Recent Graduates (Only For New Applications and Predoctoral Renewal/Revision Applications Requesting Postdoctoral Support)

To populate Table 8B Part II in the RTD, navigate to the RTD menu in xTRACT, and go to the Applicants and Entrants section.

Trainee	Doctoral Degree(s) and Year(s)	Faculty Member	Start Date	Summary of Support During Training	Degree(s) Resulting from Postdoctoral Training and Year(s)	Topic of Research Project	Initial Position	Current Position	Subsequent Grant(s)/Role/ Year Awarded
Roosevelt, Albert S.		McIver, Rosalie	01/2018		None	Estrogen receptors and ovarian cancer	Biology University of Colorado Academia	Assistant Professor Biology University of Colorado Academia Primarily Research	CA R21/PI/2023
Taylor, Susanna G.		Welte, Duncan	07/2018		None	New inhibitors for cancer imaging	Massachusetts General Hospital Academia	Staff Scientist Radiology Massachusetts General Hospital Academia Primarily Research	NSF/PI/2023

Figure 128: Sample Table 8B. Part II

In xTRACT, click the Post-Doc Participating Trainees link, then click each trainee's hyperlinked name in turn, which allows you to edit the data that subsequently populates Table 8B Part II in the RTD.

# Table 8C. Program Outcomes: Short-Term

For renewal applications, this table provides information about the use of short-term training positions.

To populate Table 8C in the RTD, navigate to the RTD menu in xTRACT, and go to the Participating Trainees section.

Trainee	Category of Trainee	Faculty Members	Start Date	Topic of Research Project	Subsequent Training or Related Award/Role/Year
Lin, Mari G.	Medical Student	Doe, John; Smith, Jerry	07/2019	PAI 1 and cardiac fibrosis	NS R25/Participant/2020 HL K23/PI/2022
Holmes, Will M.	Medical Student	Doe, John	07/2021	Study of Nonaccidental Brain Trauma	HD K12/Scholar/2023

#### Figure 129: Sample Table 8C

In xTRACT, on the list of Participating Trainees, click each trainee's linked name in turn, which allows you to edit the data that subsequently populates Table 8C in the RTD. Specifically, it populates the category and subsequent training or related award information.

# **Example Table 8 for T34 Training Grants**

T34s, or Undergraduate Training Grants, have undergraduate participants rather than Predoctoral or Postdoctoral, so column headings and other labels that refer to participants list "Undergraduates" instead of Postdoc/Predoc. Also Doctoral Degree columns are omitted. All the mappings described above apply to T34 tables also except for the mappings for Table 8B, which references the *Applicants and Entrants* section of XTRACT; T34s do not have an *Applicants and Entrants* section.

Trainee	Faculty Member	Start Date	Summary of Support During Training	Degree(s) Received and Year(s)	Topic of Research Project	Initial Position	Current Position	Subsequent Grant(s)/Role/Yea Awarded
Gonzalez, Marc A.	Bradley, Andrea M.	09/2008		M.D./Ph.D. 2019	notential of cell	MD/PhD Student School of Medicine UCLA Further Training	Medical Resident Dept of Neurology Cedars-Sinai Hospital Further Training	AG F30/PI/2013- 2016
Johnson, Gina R.	Diaz, Manuel R.	09/2008	TY 2: Univ WS	BS 2012 MS 2014 PhD 2019	Viral infections	Master's student Microbiology Vanderbilt University Further Training	Scientist I Pfizer For-profit Primarily Research	AI F31/PI/2017- 2019
Part II. Recent	Graduates	(Only for N	ew Application	ns)				
Part II. Recent Undergraduate Student Participant	Faculty Member	(Only for No Start Date	Summary of Support During Training	Degree(s)	Topic of Researd Project	h Initial Position	Current Positi	on Subsequent Grant(s)/ Role/Year Awarded
Undergraduate Student	Faculty		Summary of Support During	Degree(s) Received and		Ph.D. Student Dept of Molecular		on Grant(s)/ Role/Year

Figure 130: Sample Table 8D. Program Outcomes: Undergraduate, Part I and Part II