User Guide

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: eRACommunications@mail.nih.gov.

Troubleshooting support:

Please contact the eRA Service Desk:

Toll-free: 1-866-504-9552

Phone: 301-402-7469

TTY: 301-451-5939

Web: http://grants.nih.gov/support (Preferred method of contact)

Email: helpdesk@od.nih.gov (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
- *Table 2: Participating Faculty Members* on page 284

- *Table 3: Federal Organizational Research Training Grant and Related Support Available to Participating Faculty Members* on page 288
- *Table 4. Research Support of Participating Faculty Members* on page 291
- *Table 5 (A & B): Publications of Those in Training* on page 294
- *Table 6 (A & B): Applicants, Entrants, and their Characteristics for the Past Five Years* on page 298
- *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.

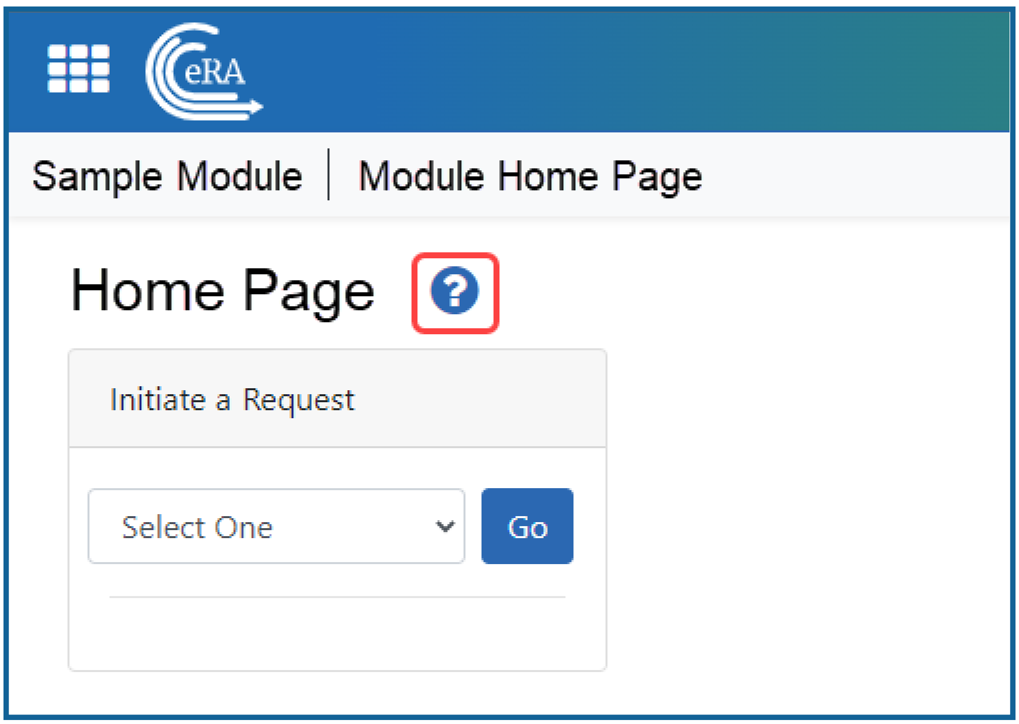
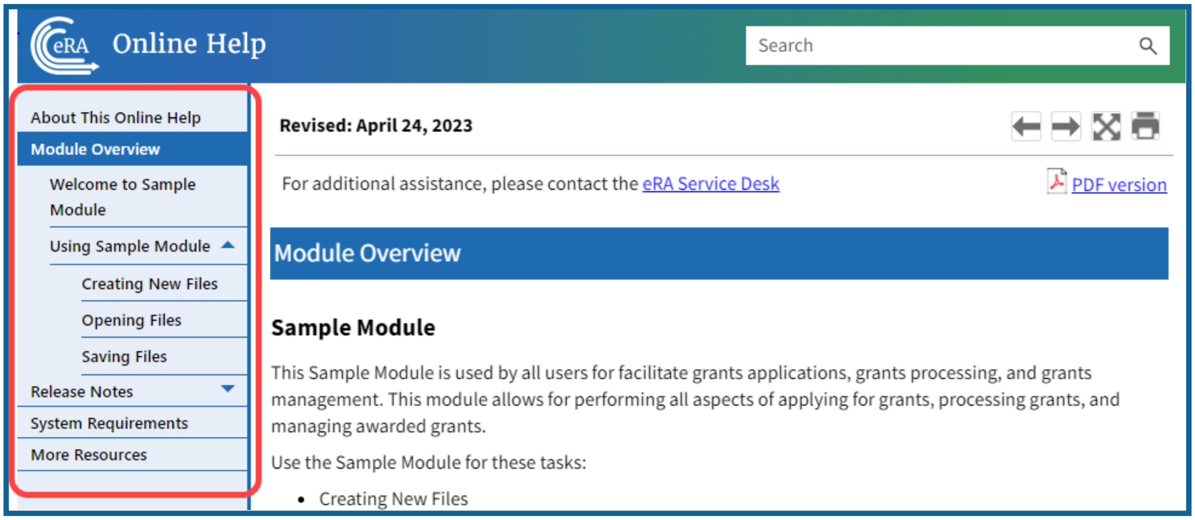
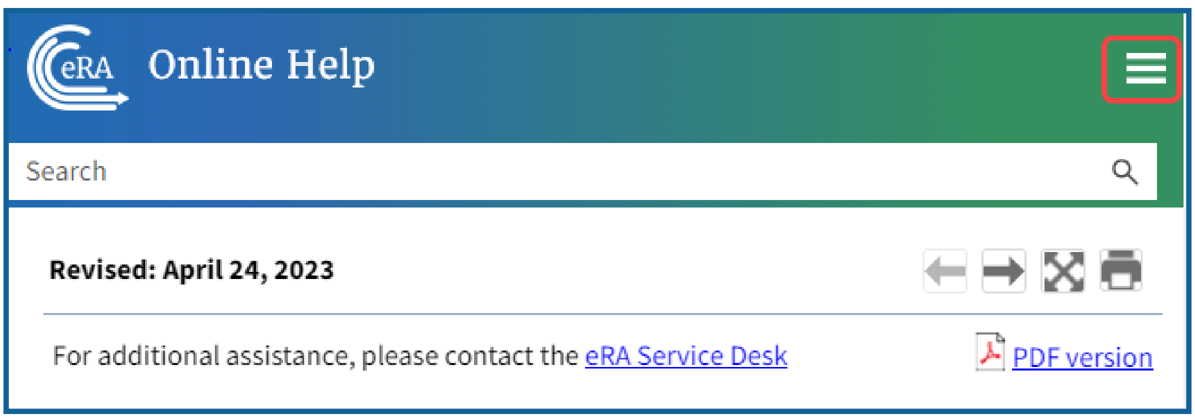


Table of Contents Pane

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.

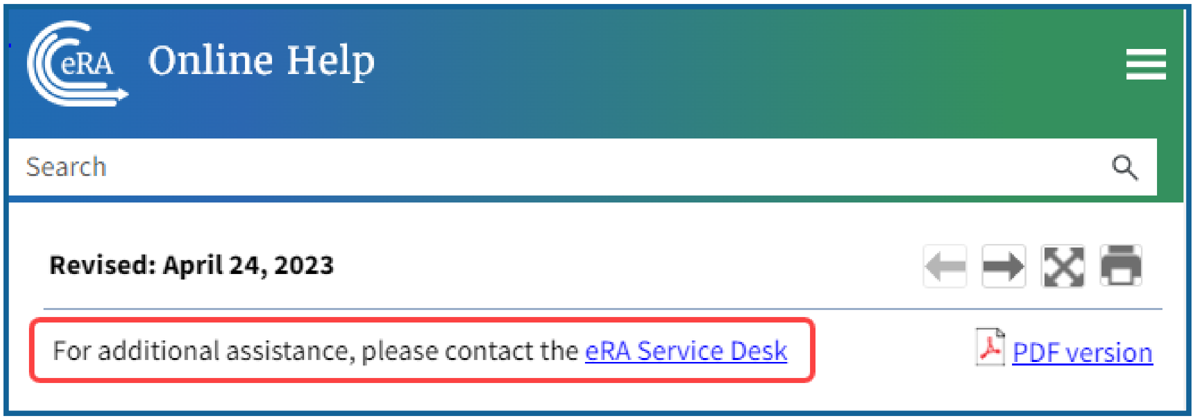


When the browser window is narrow, the table of contents pane is hidden. To view a hidden table of contents, click the three-horizontal-line icon at right top to toggle the table of contents between onscreen and hidden.



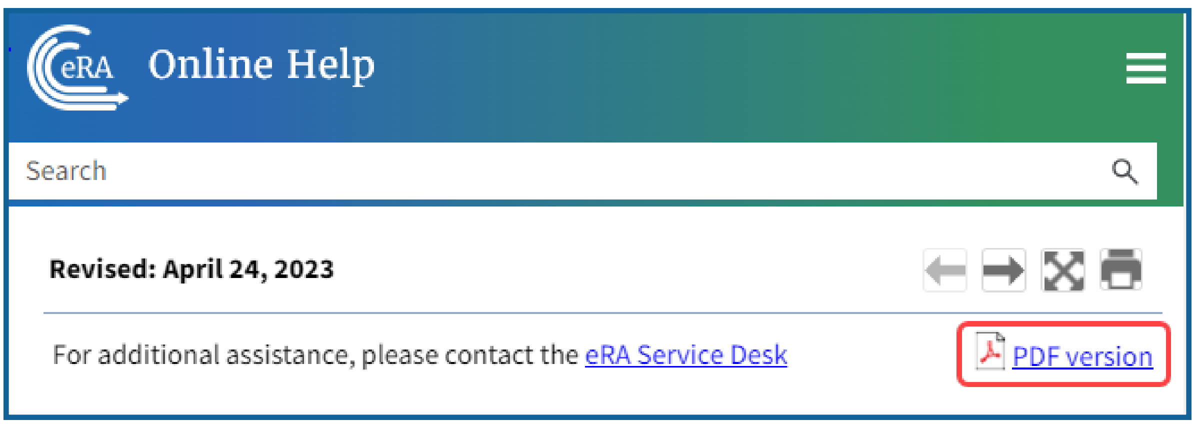
Contacting the eRA Service Desk

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.



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.



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:

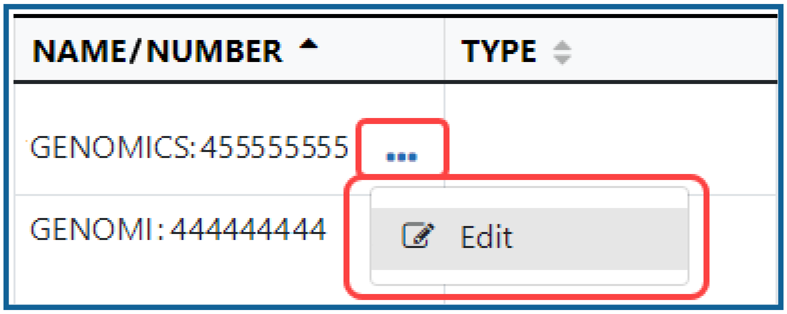
Creating a New File

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.

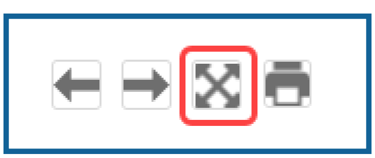


Tools for Navigating Topics, Showing Hidden Material, and Printing

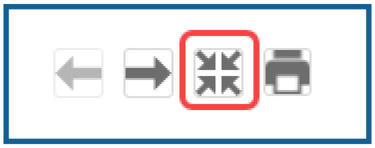
Click the left and right arrow icons at top right to go to the previous or next topic in the table of contents:

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.

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***.

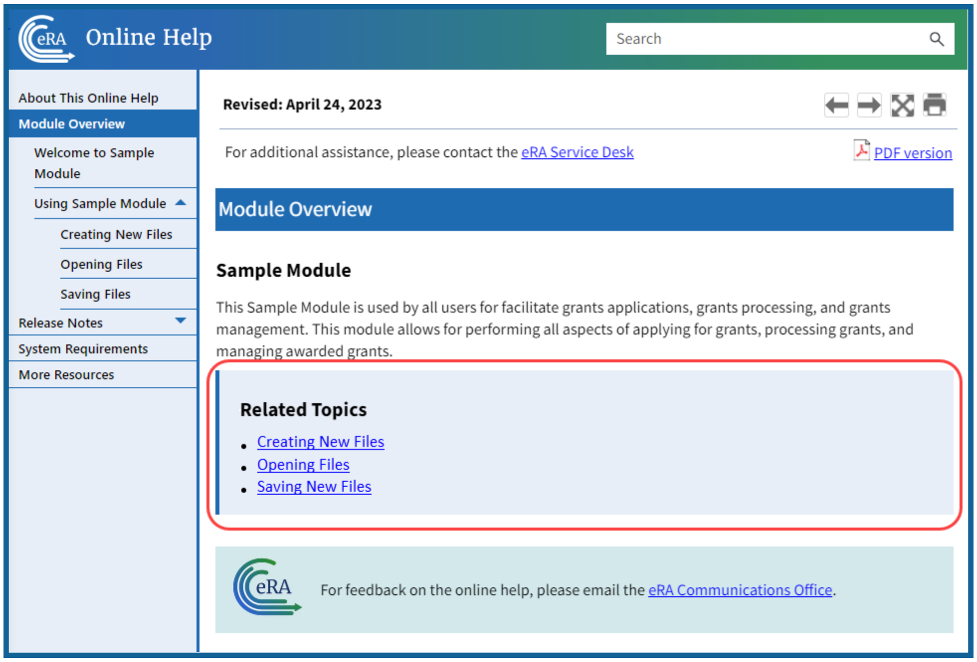
If you want only topics that contain an exact phrase, enclose it in double quotation marks like this:

"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 the eRA website and use the search field at the top of the page.

Finding Related Topics

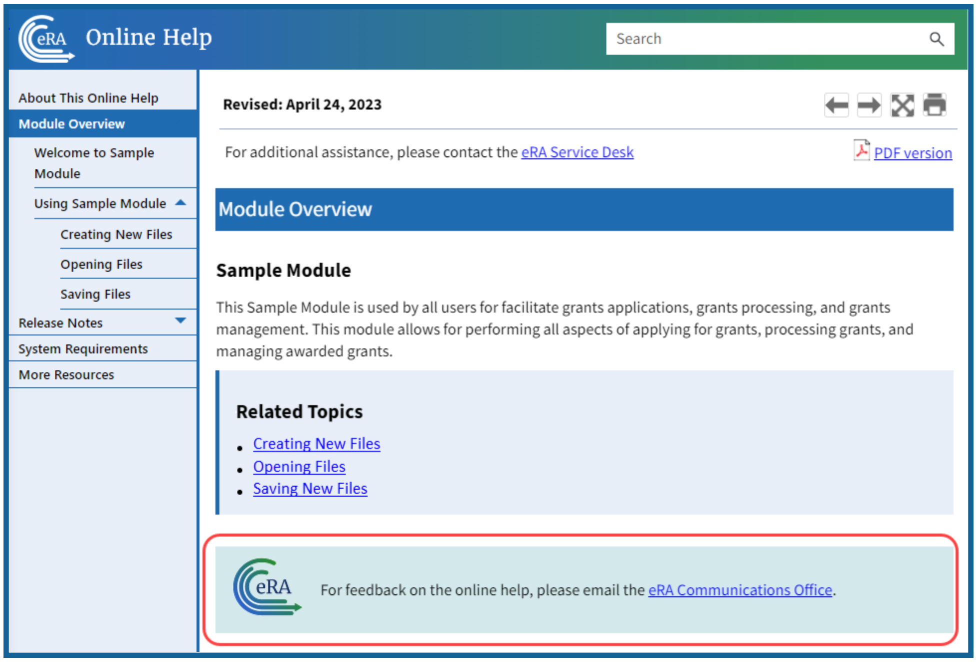
Most topics contain a Related Topics section, which show links to a list of topics that are related to the one you are viewing.



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 eRA Service Desk instead of the Communication Office.



Online Help
Search
About This Online Help
Module Overview
Welcome to Sample Module
Using Sample Module
Creating New Files
Opening Files
Saving Files
Release Notes
System Requirements
More Resources
Revised: April 24, 2023
For additional assistance, please contact the eRA Service Desk
PDF version
Module Overview
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.
Related Topics
Creating New Files
Opening Files
Saving New Files
For feedback on the online help, please email the eRA Communications 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.

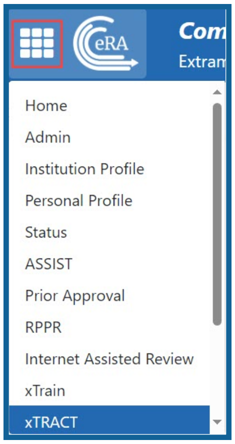
Read this topic to learn about:

- 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.

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.

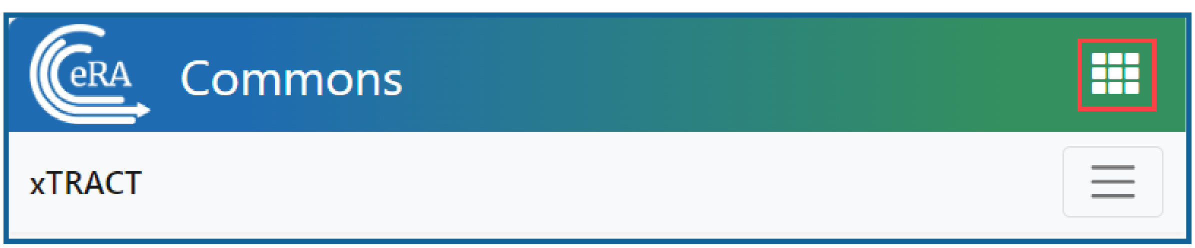
Links to a general eRA Service Desk Support page.

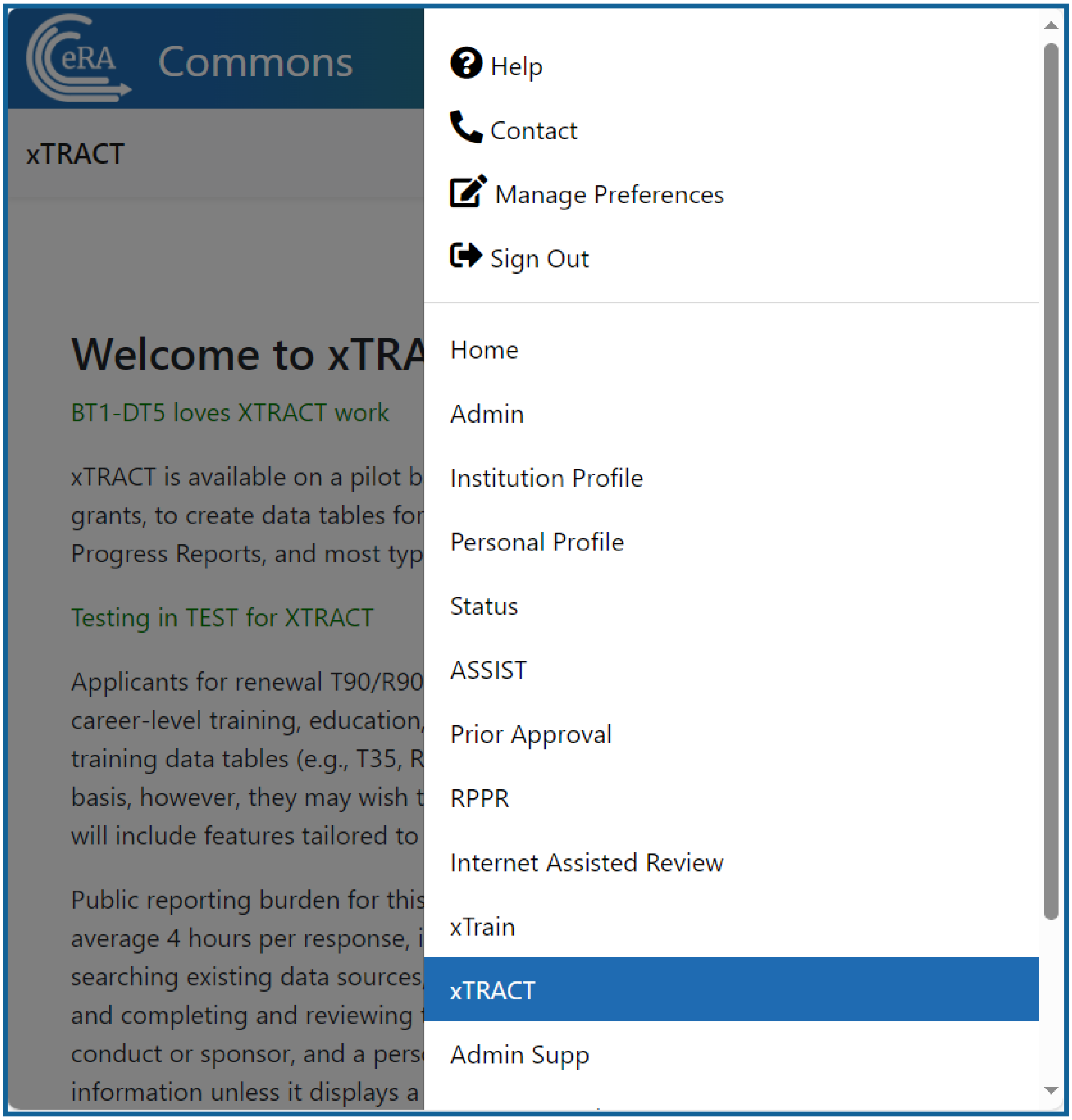
Links to eRA Points of Contact page.

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.





Redesigned Footer

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

Navigating Within a Module

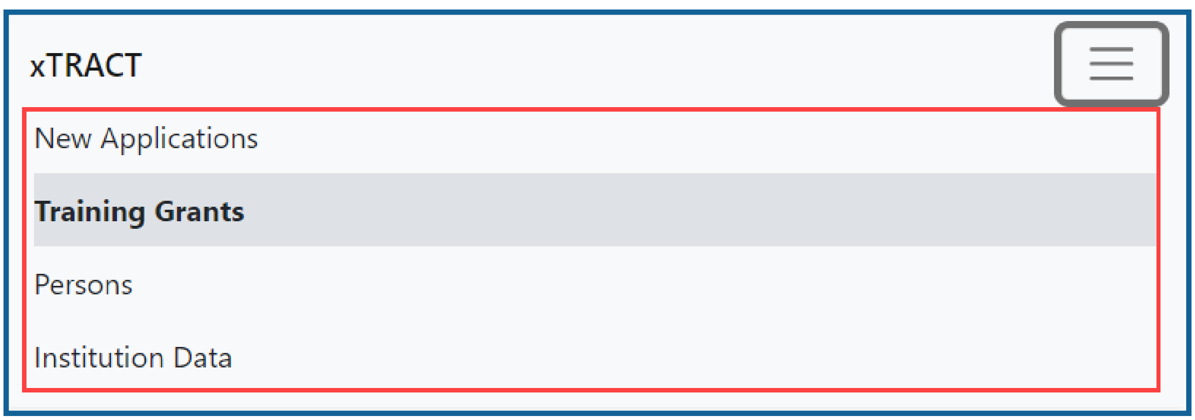
The module abbreviation, circled below left, lets you quickly see which module you are working in.

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.

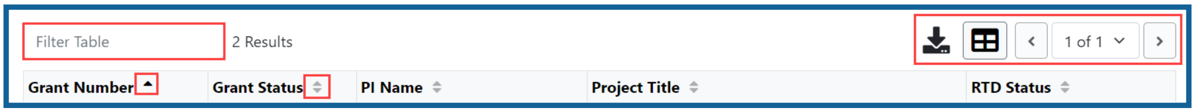


Actions Column Replaced by Ellipsis Menu

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

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.

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Column Sorting

Click column headers to sort by that column.

Download and Print

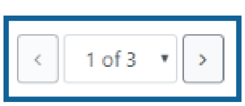
Use the download tool , shown below, to export table data to Excel or PDF, or to print. Data from all columns is exported/printed even if only a subset of columns are visible.

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: https://grants.nih.gov/grants/funding/datatables-f/Consolidated_Training_Tables.docx
- View PDF: https://grants.nih.gov/grants/funding/datatables-f/Consolidated_Training_Tables.pdf

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:

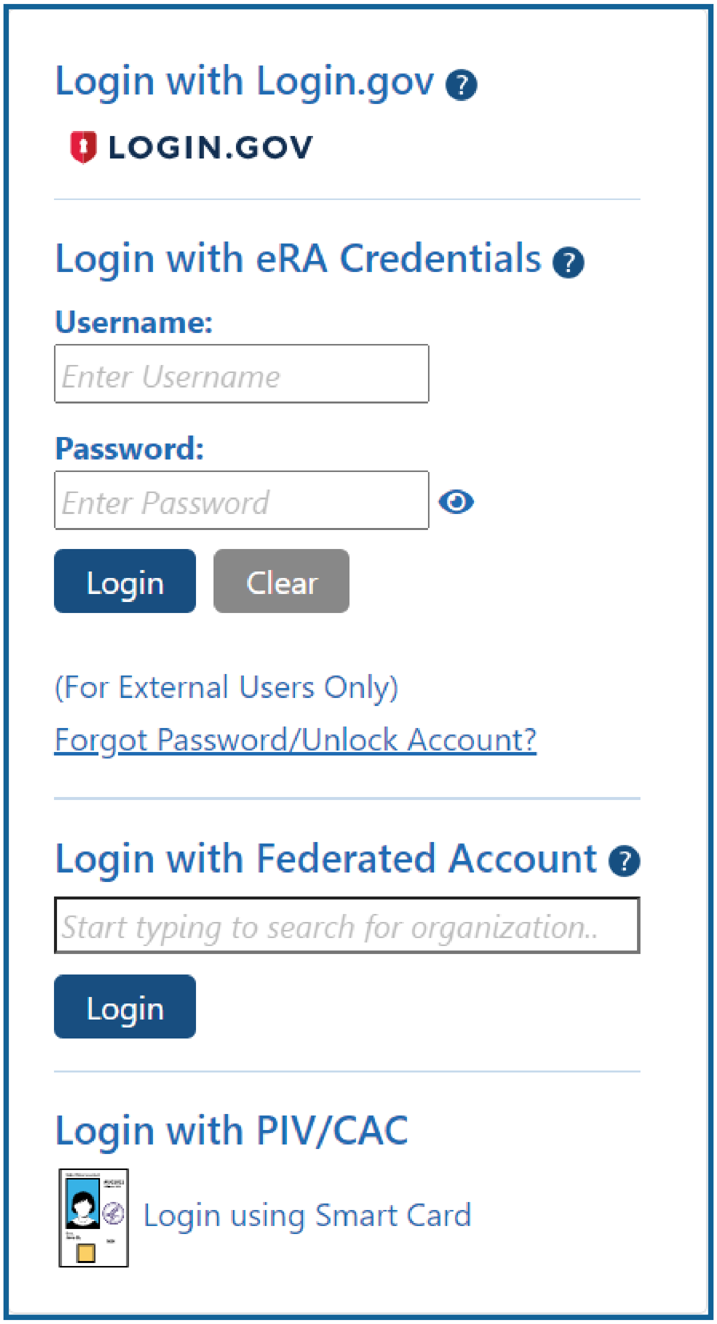
Advance Notice of Transition to the xTRACT System for Preparing Research Training Data Tables - NOT-OD-18-133

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 navigate to xTRACT via module navigation.
- To access xTRACT via xTRACT 's log in screen, access the login page here, https://public.era.nih.gov/xtract/.



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 Login Screen for Internal Staff, 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 . (https://public.era.nih.gov/commons/)
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.

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 https://grants.nih.gov/support/index.html

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.

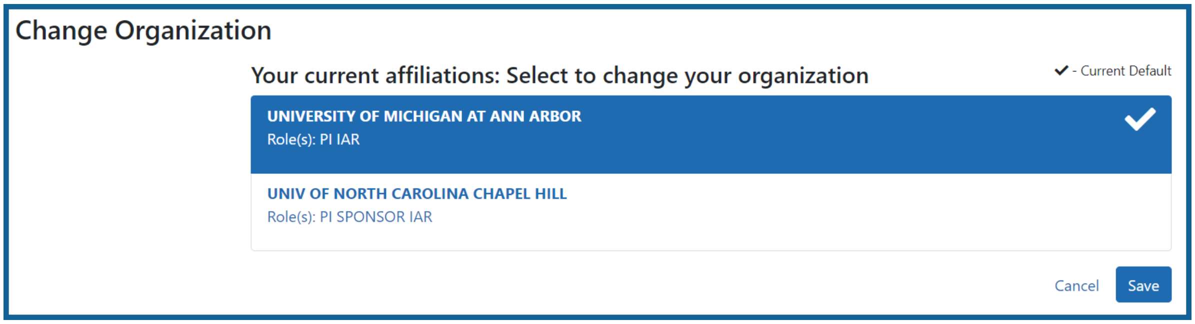
NOTE: Your default organization can be changed at any time.

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 organ-izations with which you are affiliated.



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.

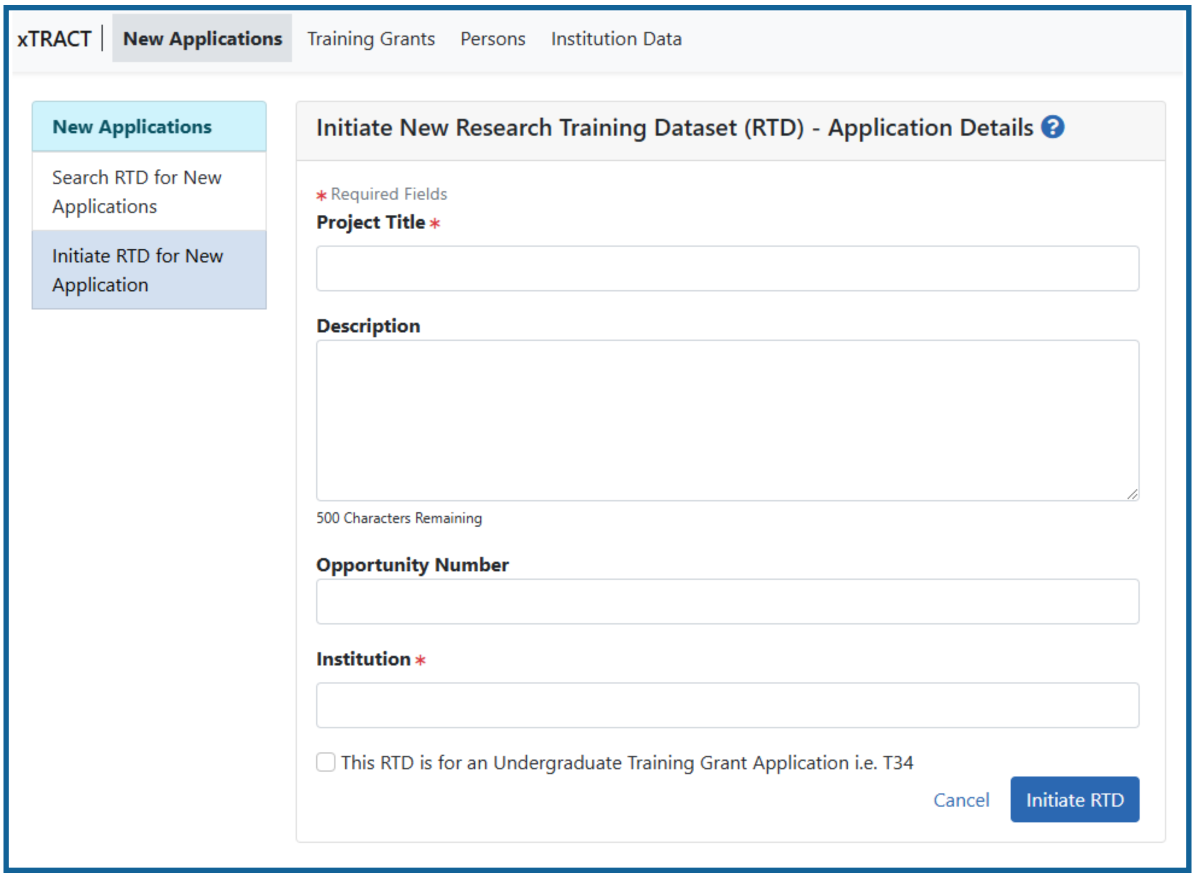


Figure 1: Initiate RTD for New Application screen

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.

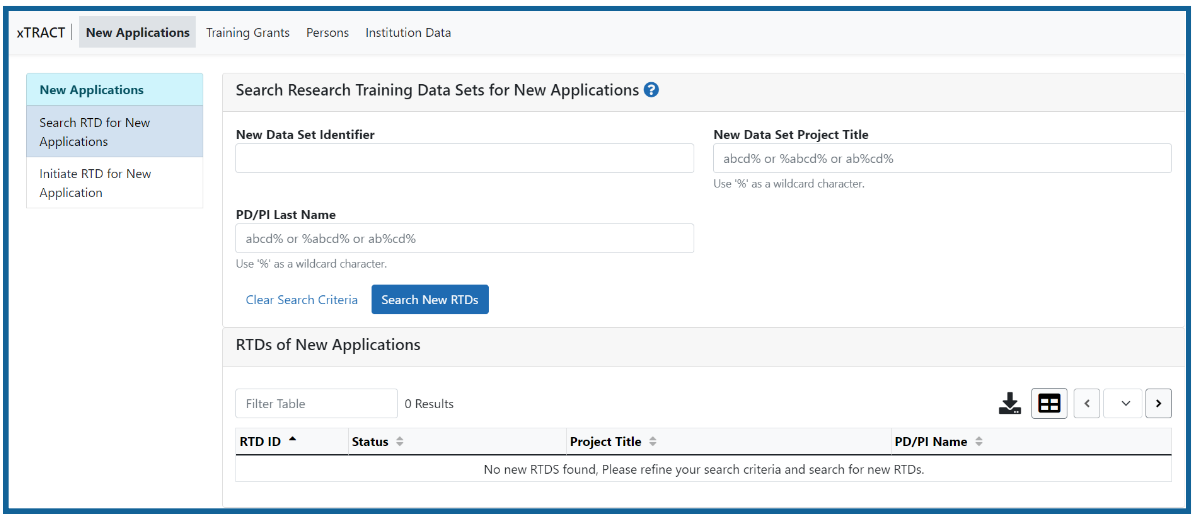


Figure 2: Searching for New Applications

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

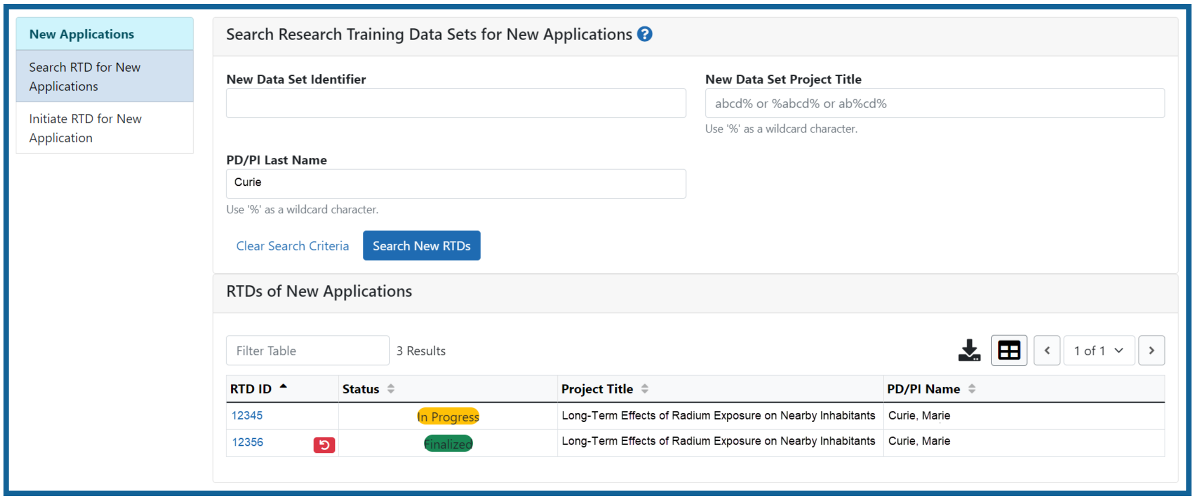


Figure 3: RTDs for New Applications - Search Results

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.

-  **Unfinalize 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.

   <u>Grant Number</u>

   - **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.

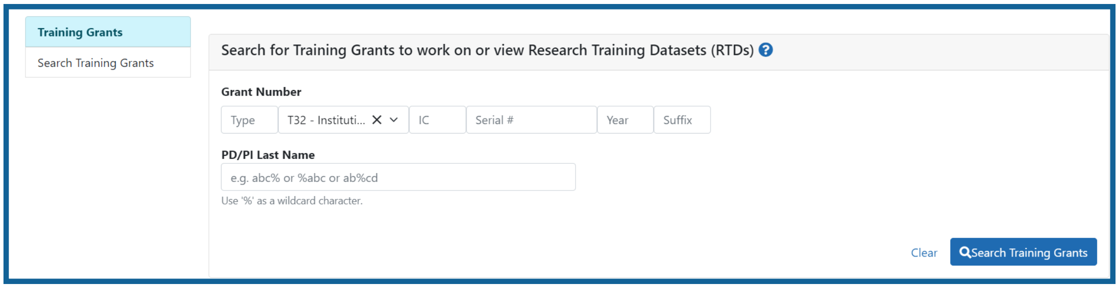


Figure 4: Searching Training Grants

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.

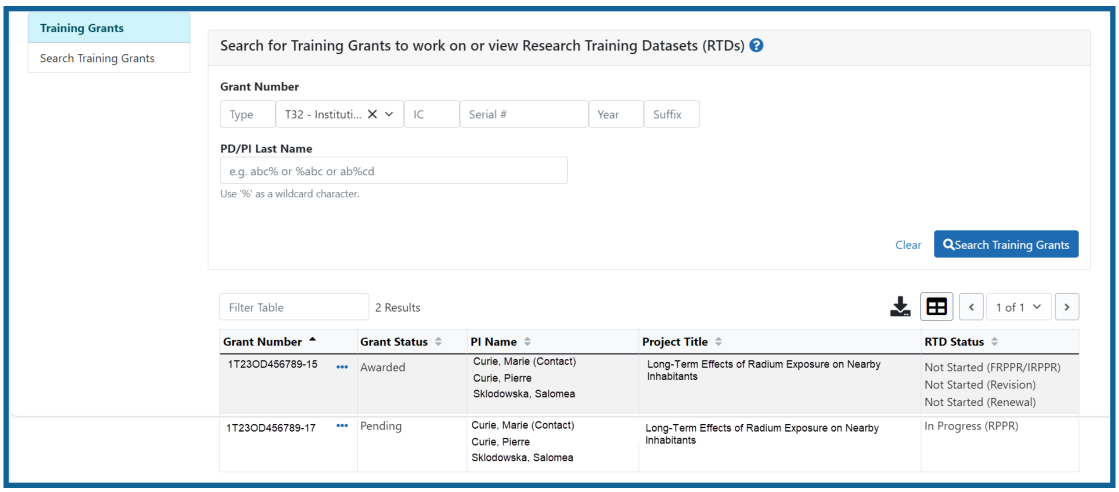


Figure 5: Searching Training Grants - Results

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.

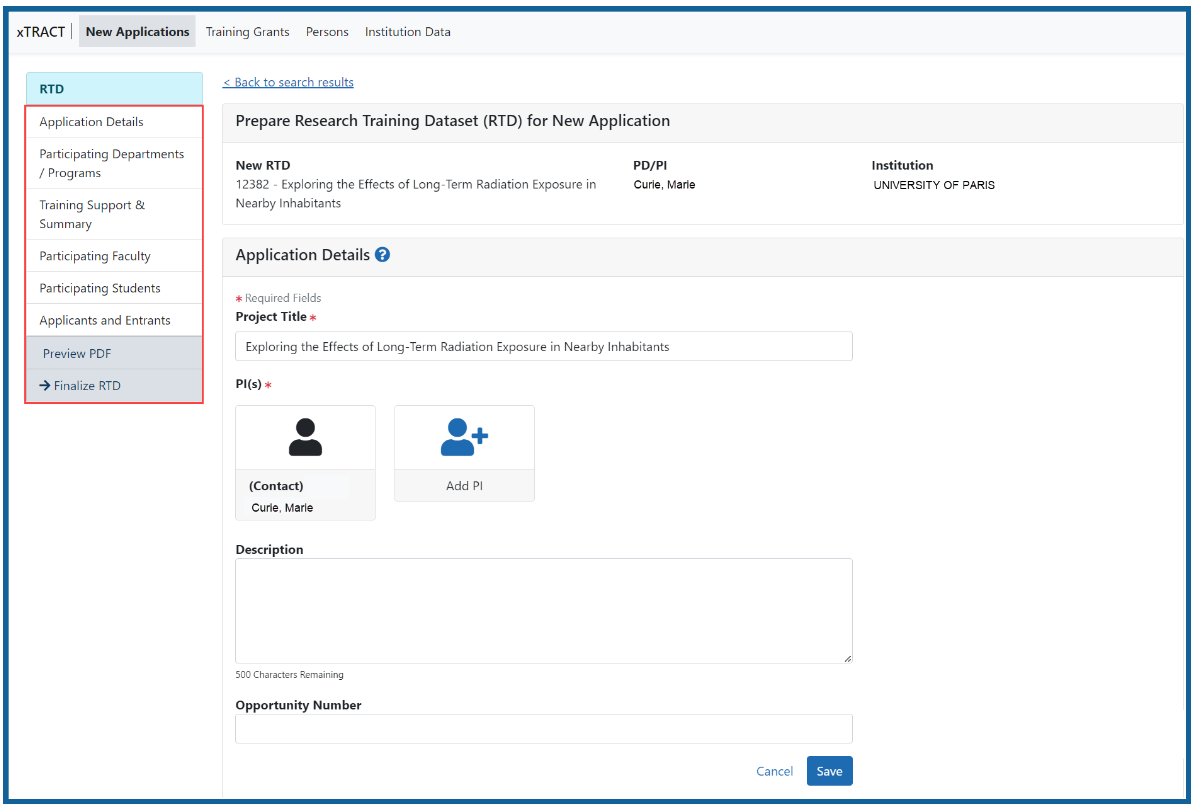


Figure 6: RTD Links for New Applications

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.

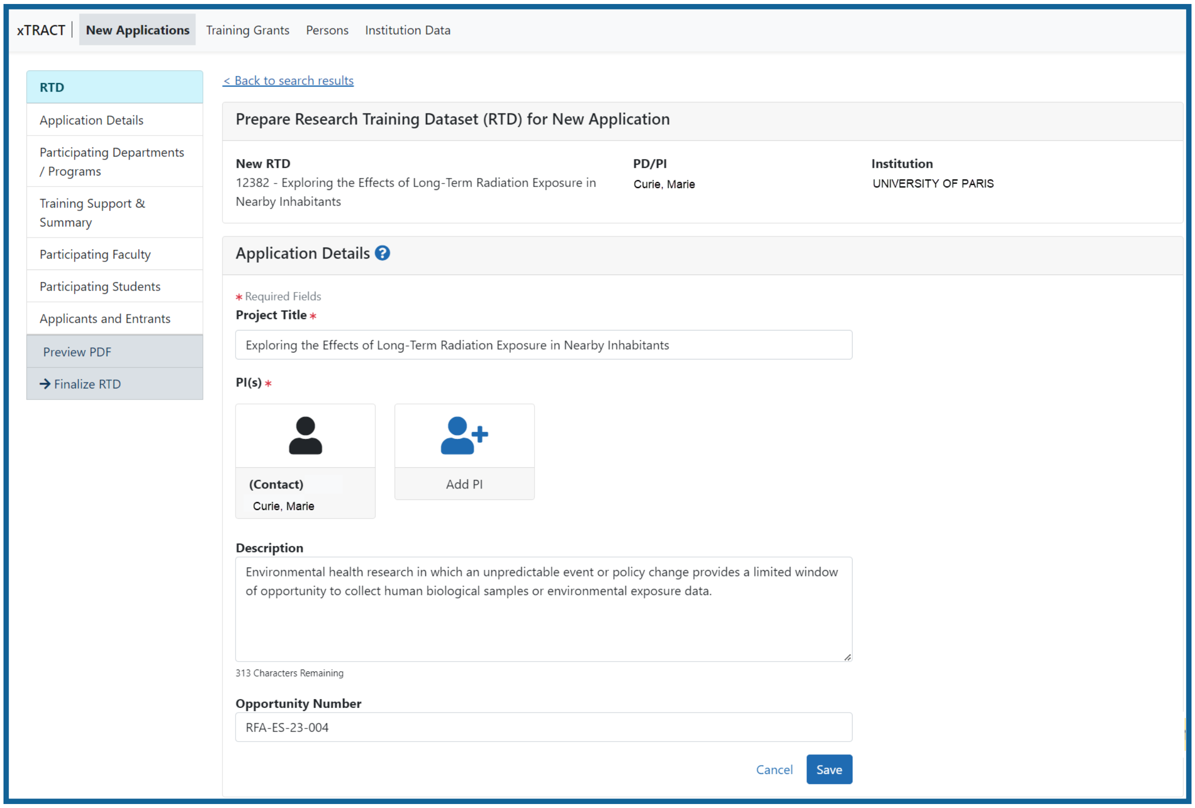


Figure 7: Prepare RTD for New Application

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.

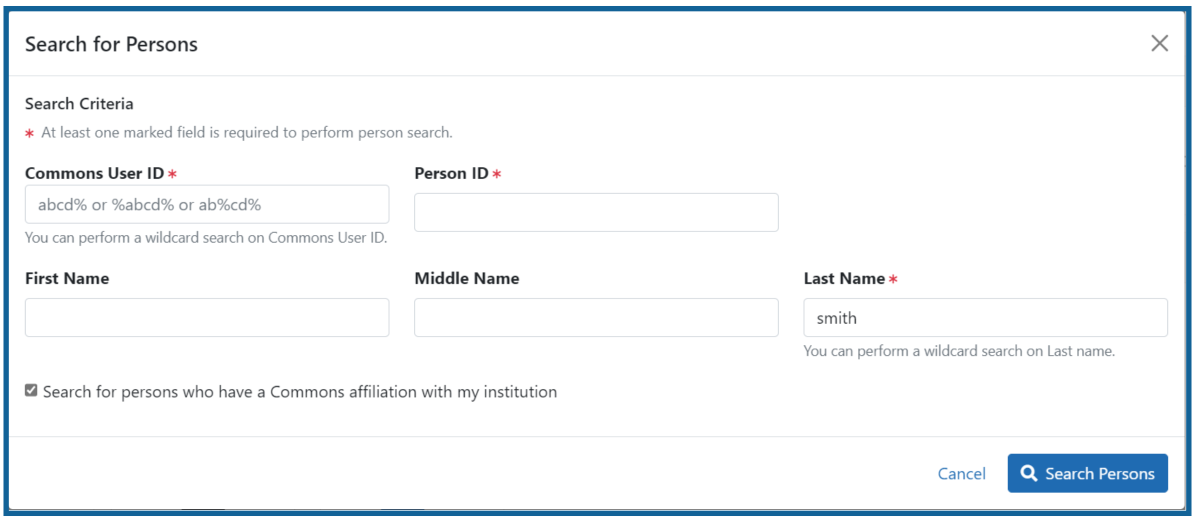


Figure 8: Search for Persons

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

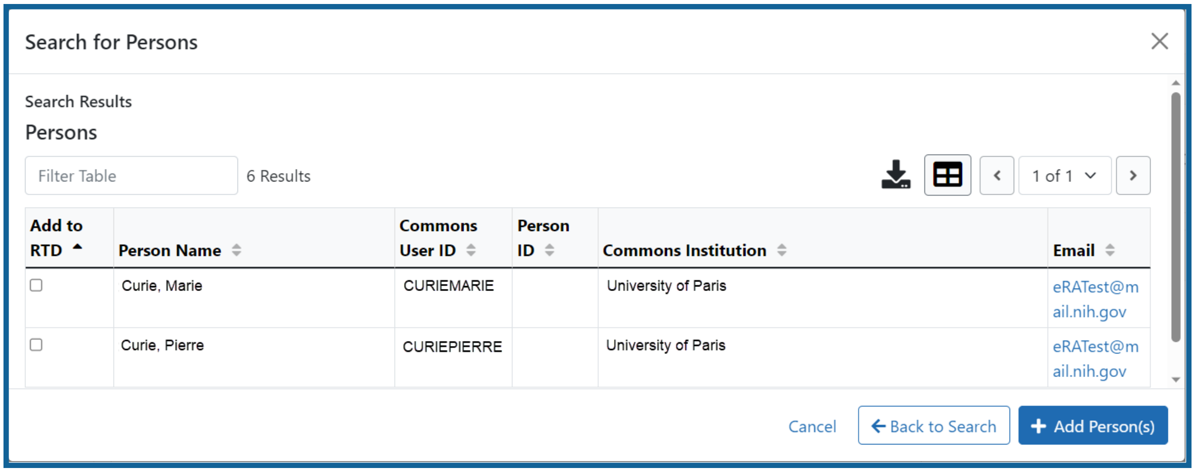


Figure 9: Search for Persons with Results

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 PI

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

1. 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.

1. In the **Basic Information** section of the RTD, find the PI you wish to remove. Click the 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.

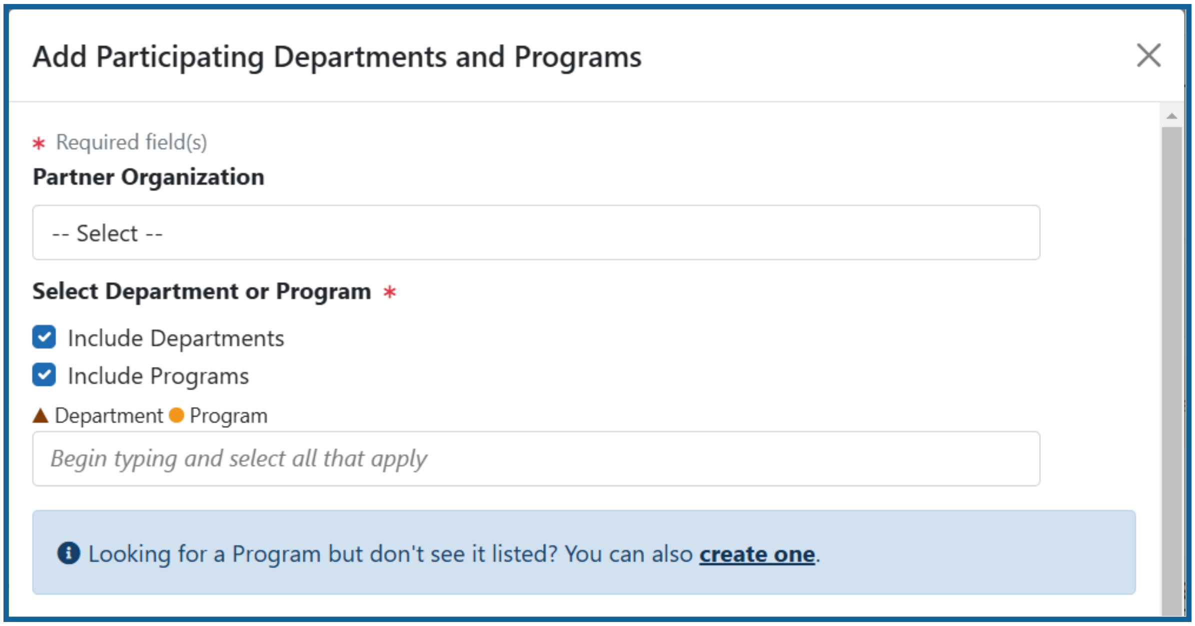


Figure 10: Adding Departments

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.

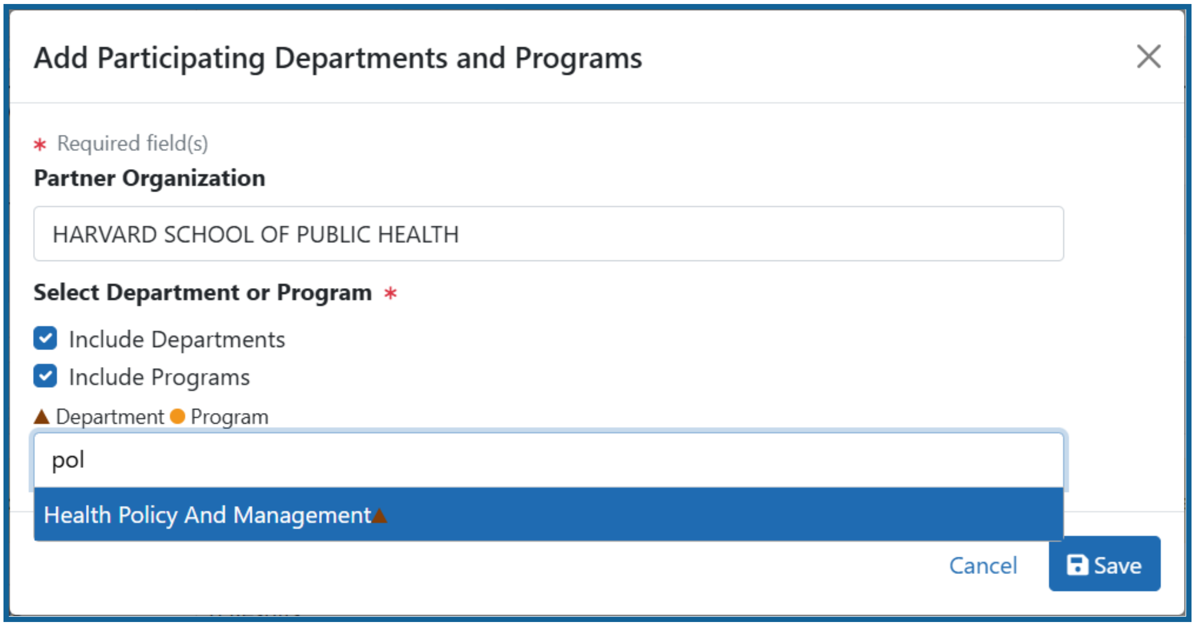
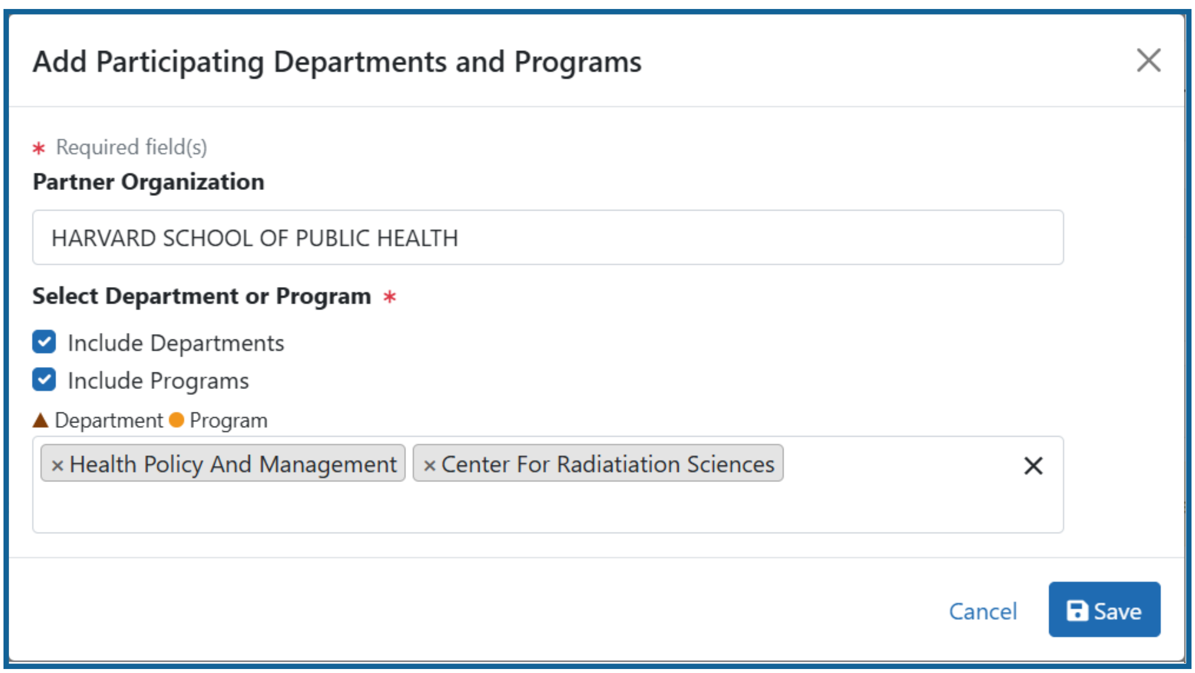


Figure 11: Searching for Departments

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.



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.

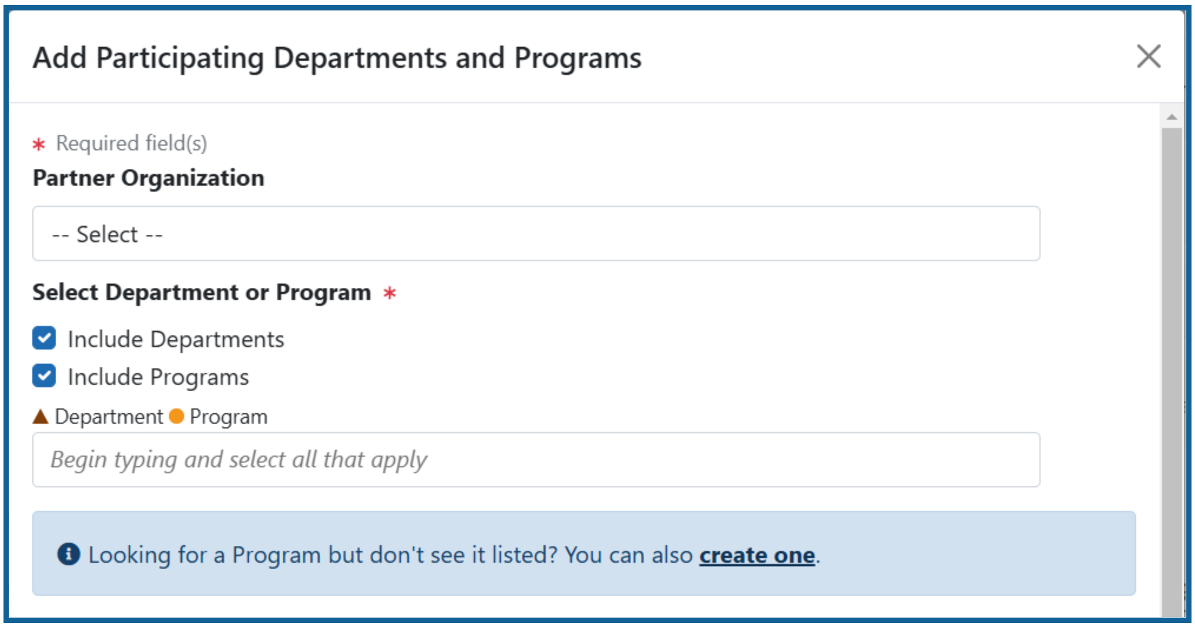


Figure 12: Add Participating Departments or Programs Button

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.

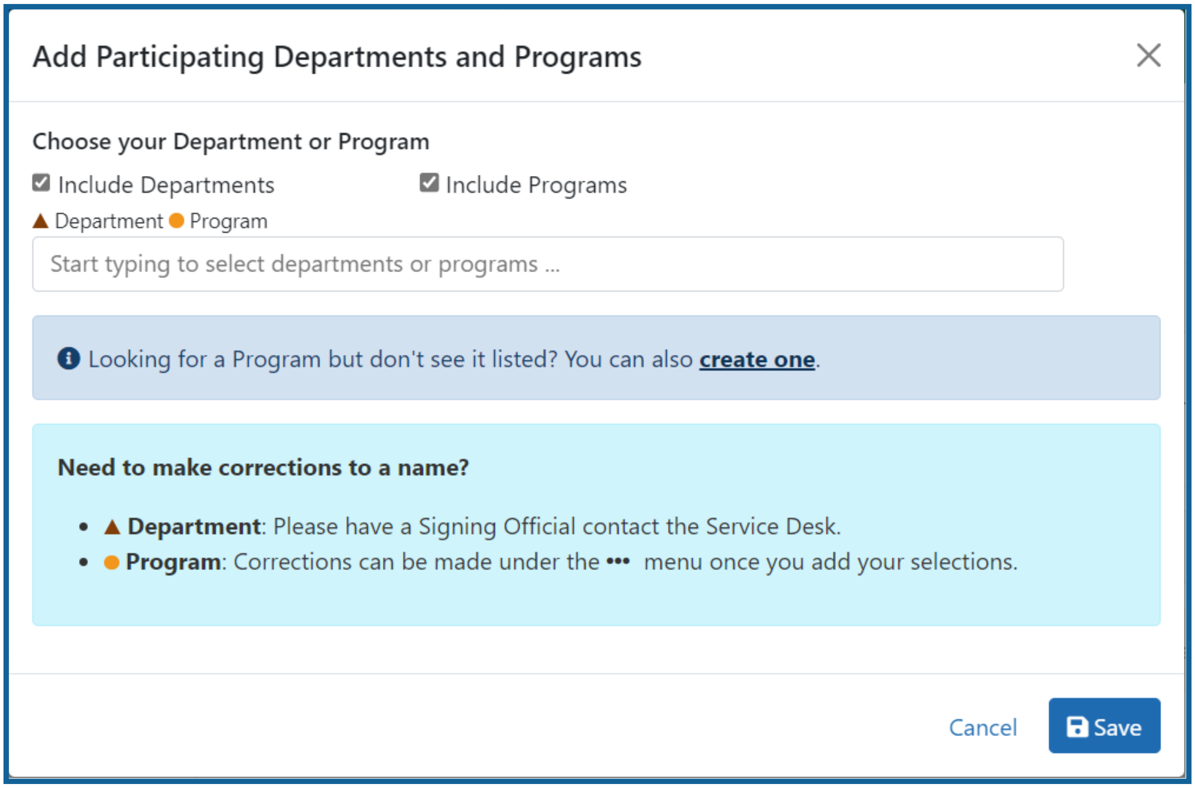


Figure 13: Searching for Programs Displaying Create One Hyperlink

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

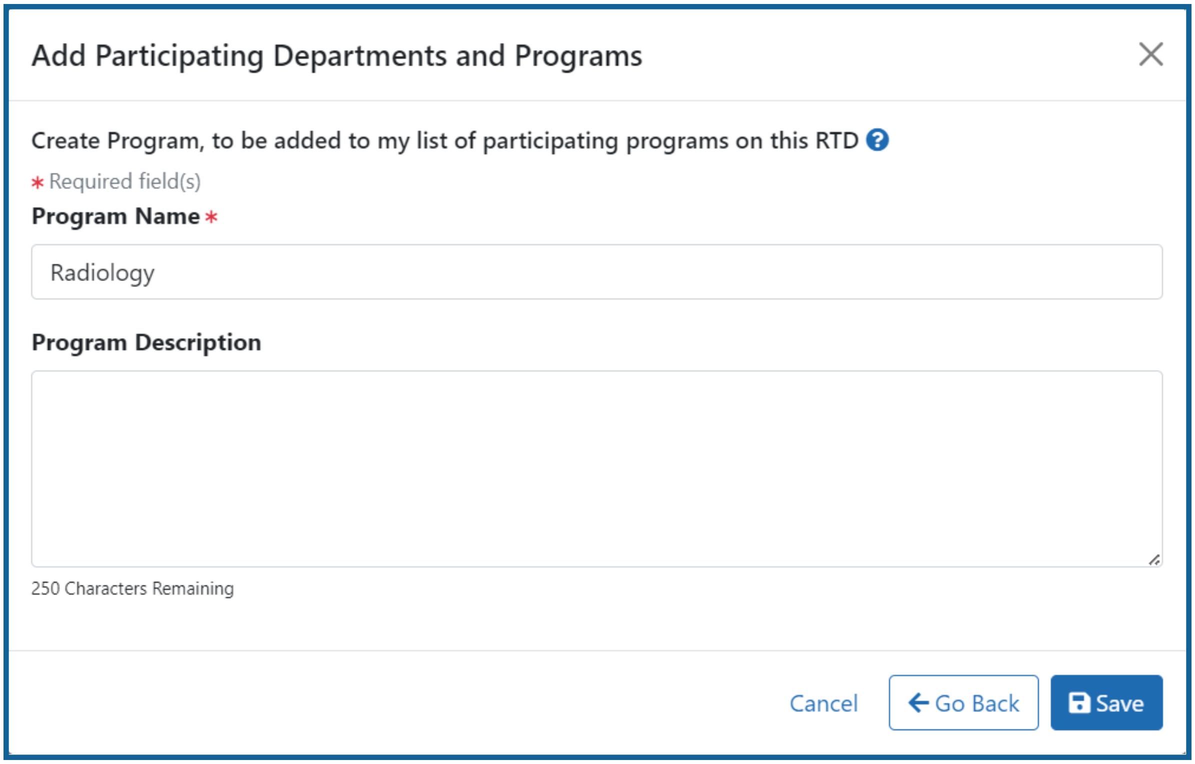


Figure 14: Adding a Program

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 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 three-dot ellipsis button and select **Edit Census**.

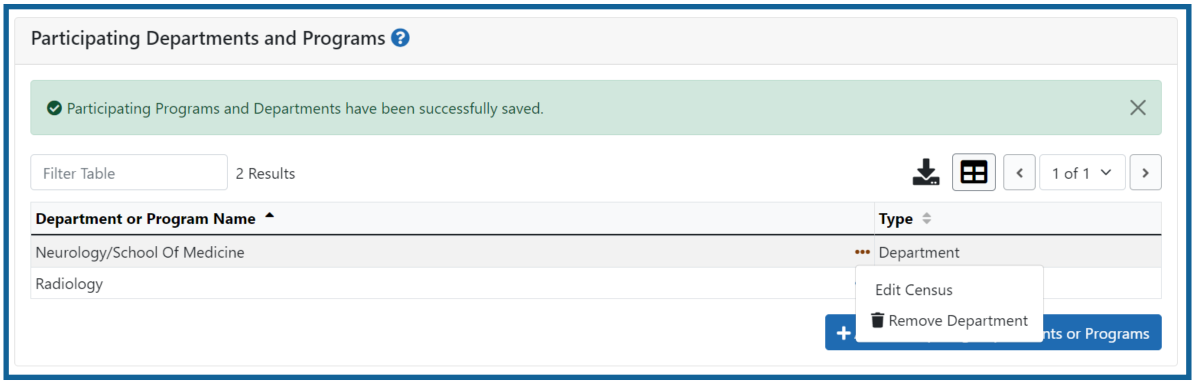


Figure 15: Edit Census for Programs and Departments

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

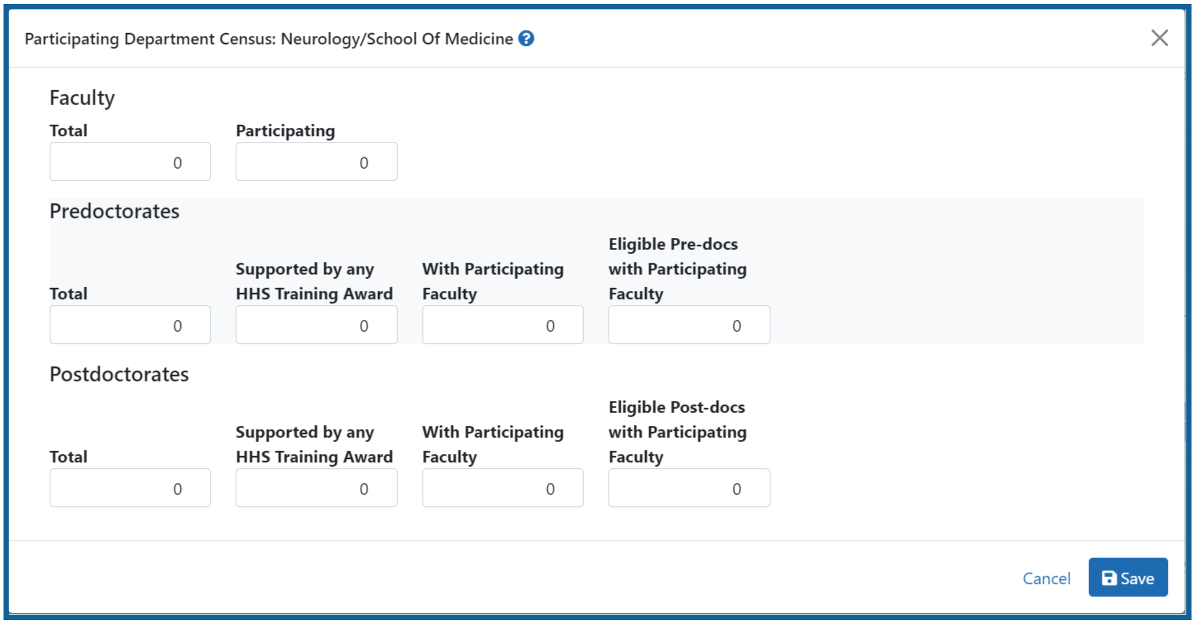


Figure 16: Participating Department/Program Detail

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.

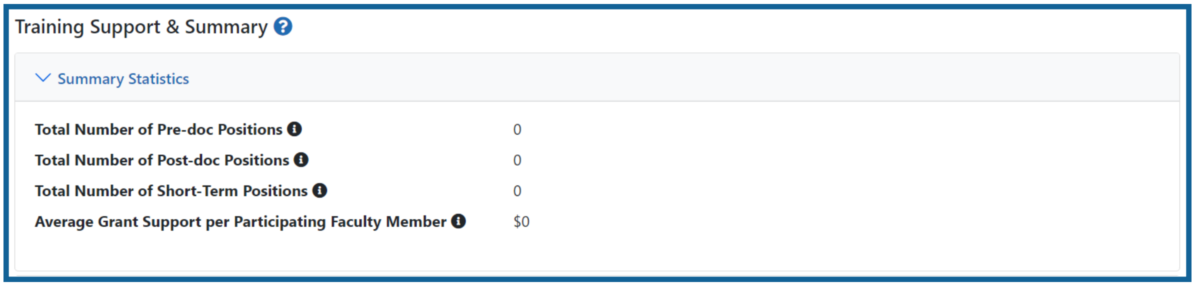


Figure 17: Training Support & Summary

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.

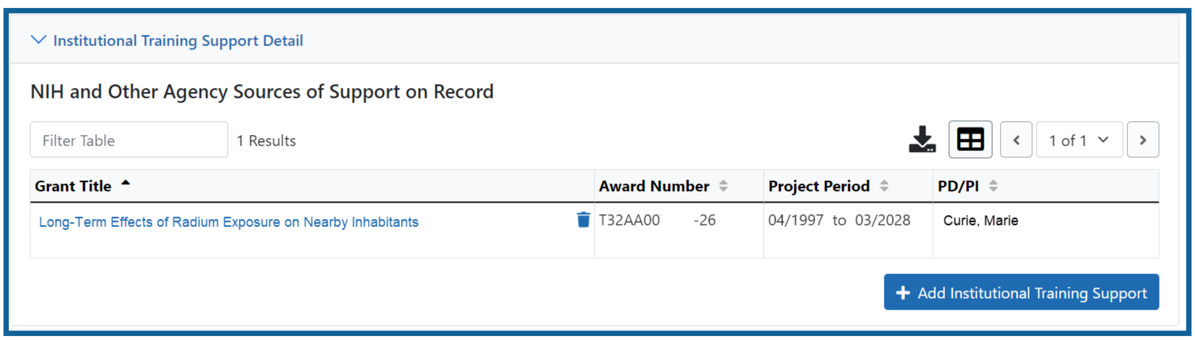


Figure 18: Add Institutional Training Support Button

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.

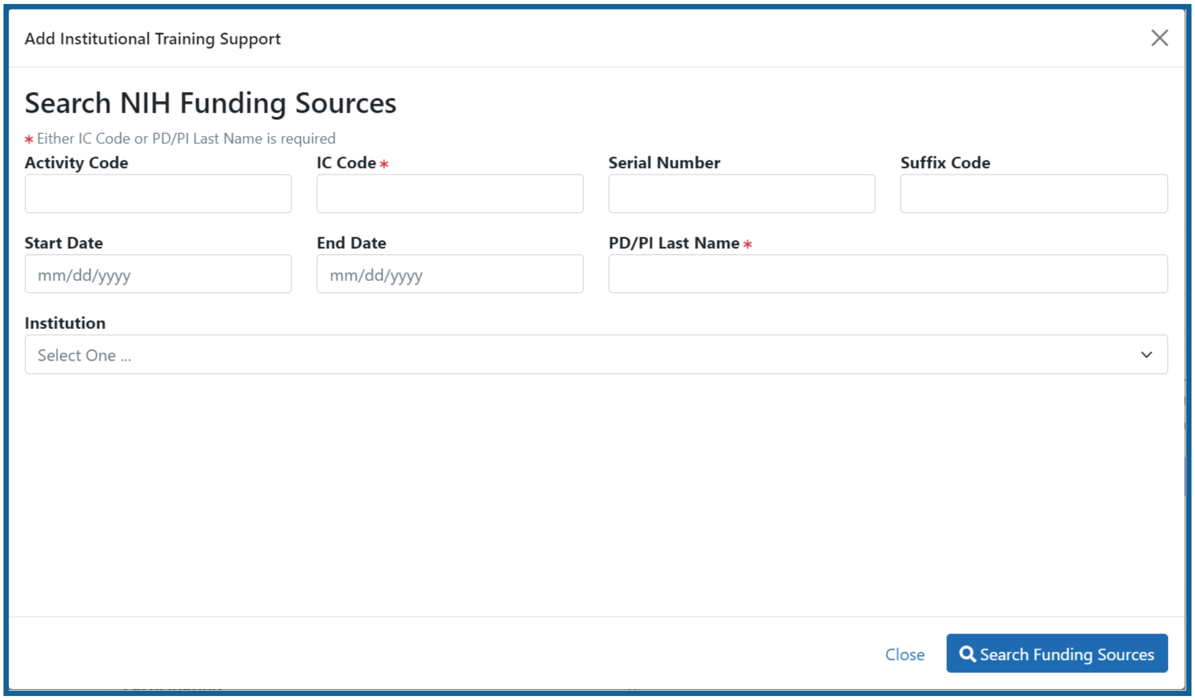
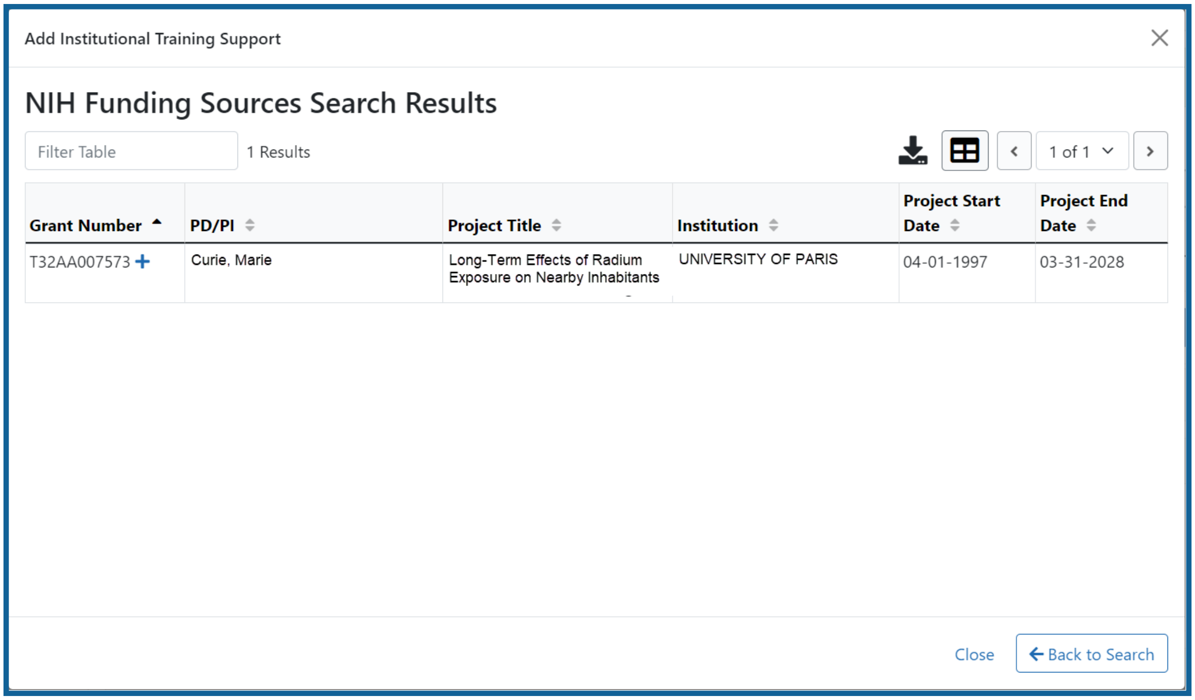


Figure 19: Searching for Funding Sources

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



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.

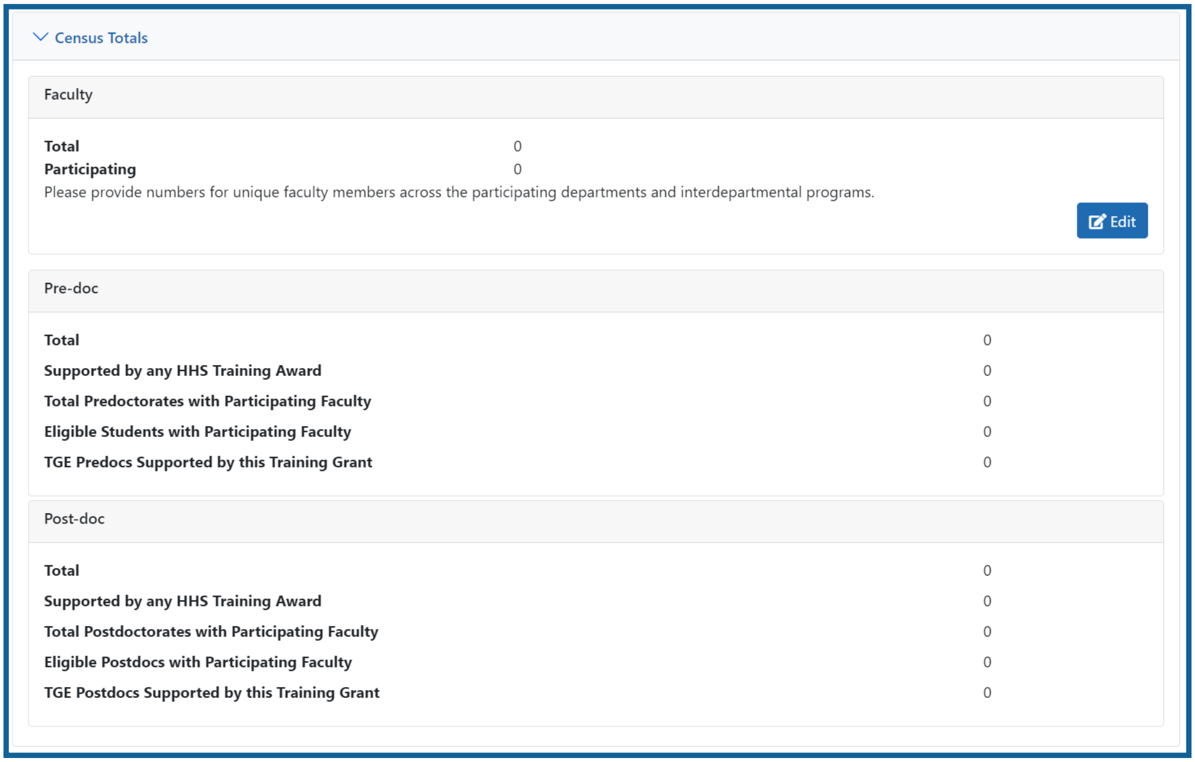
5. To remove the funding source, click the **Remove Institutional Training Support** button next to the grant title.

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
- 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 **Participating 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 **Participating 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 **Participating 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.

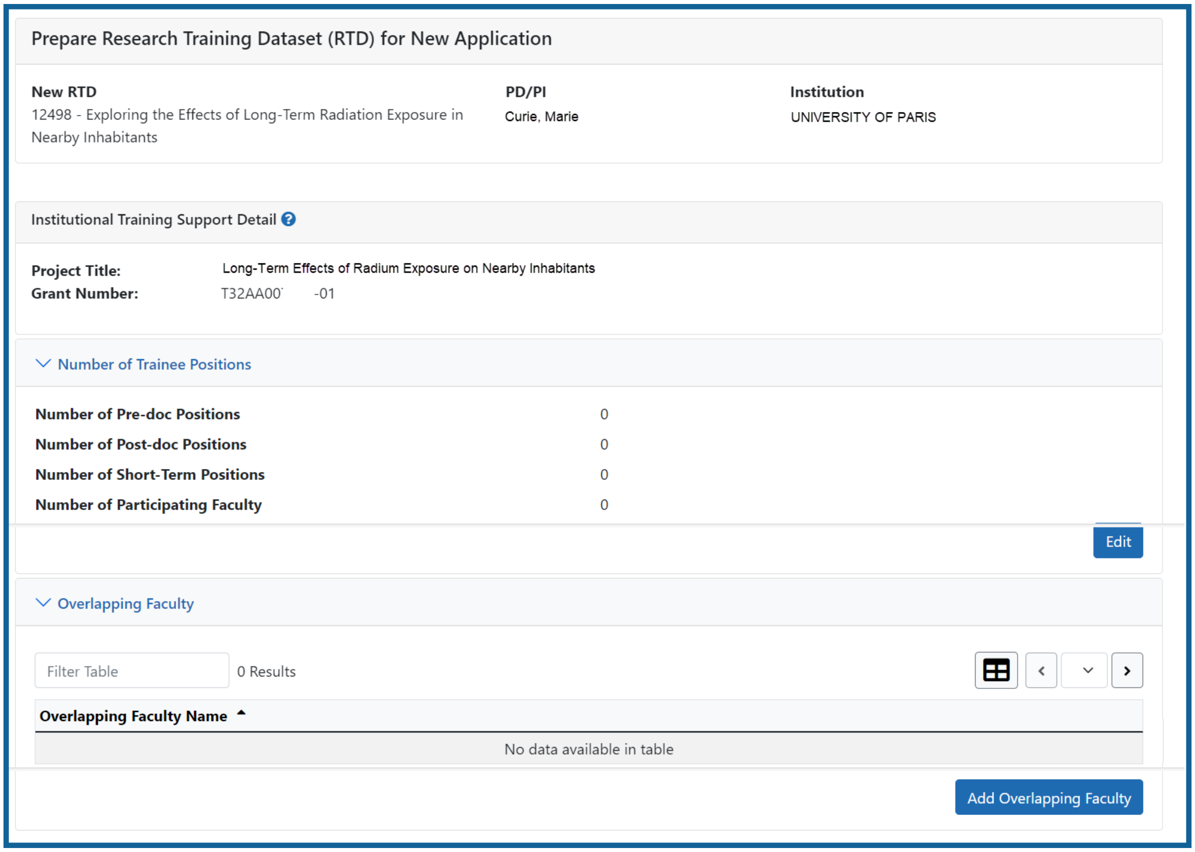


Figure 20: Institutional Training Support Detail

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.

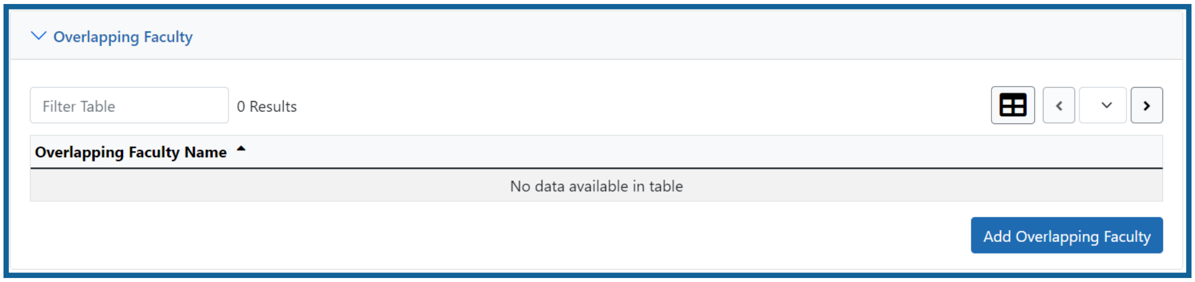


Figure 21: Add Overlapping Faculty Button

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

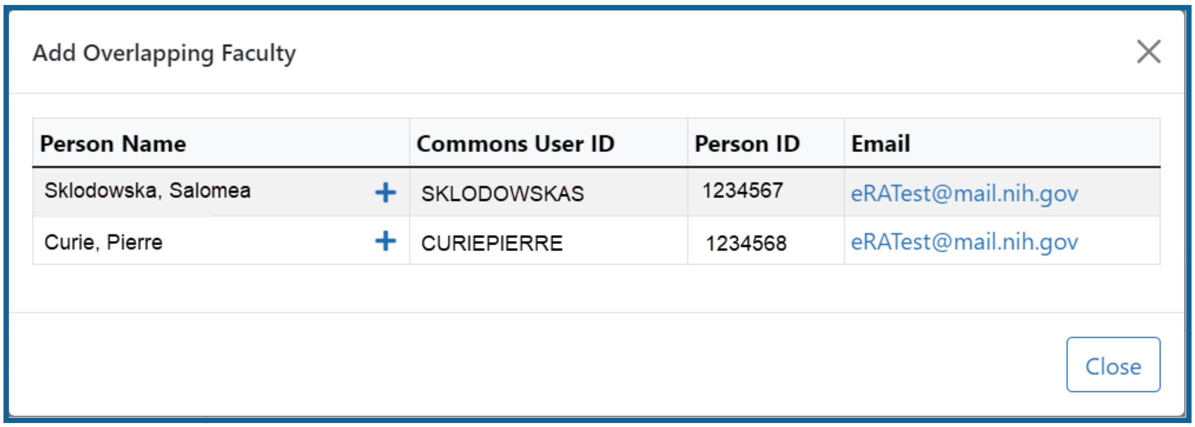
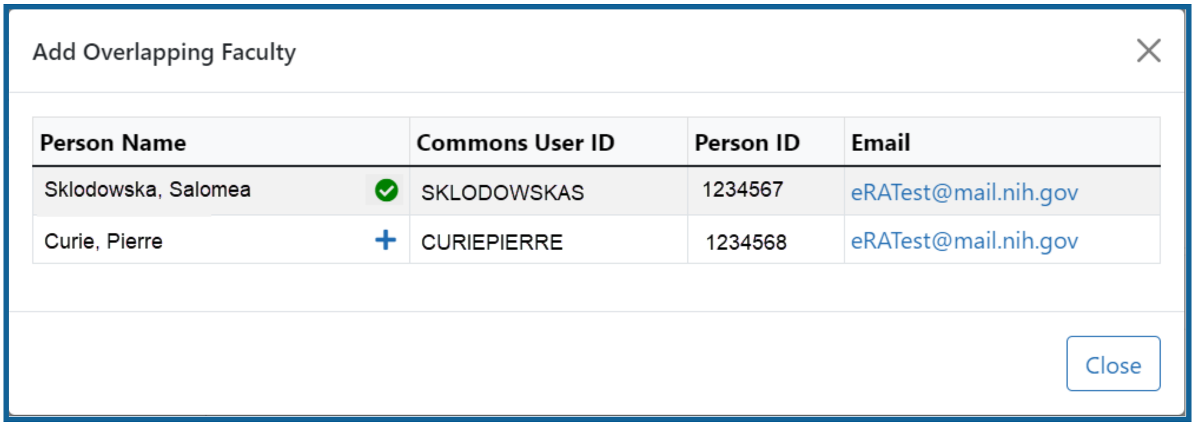


Figure 22: Add Overlapping Faculty screen

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.



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.

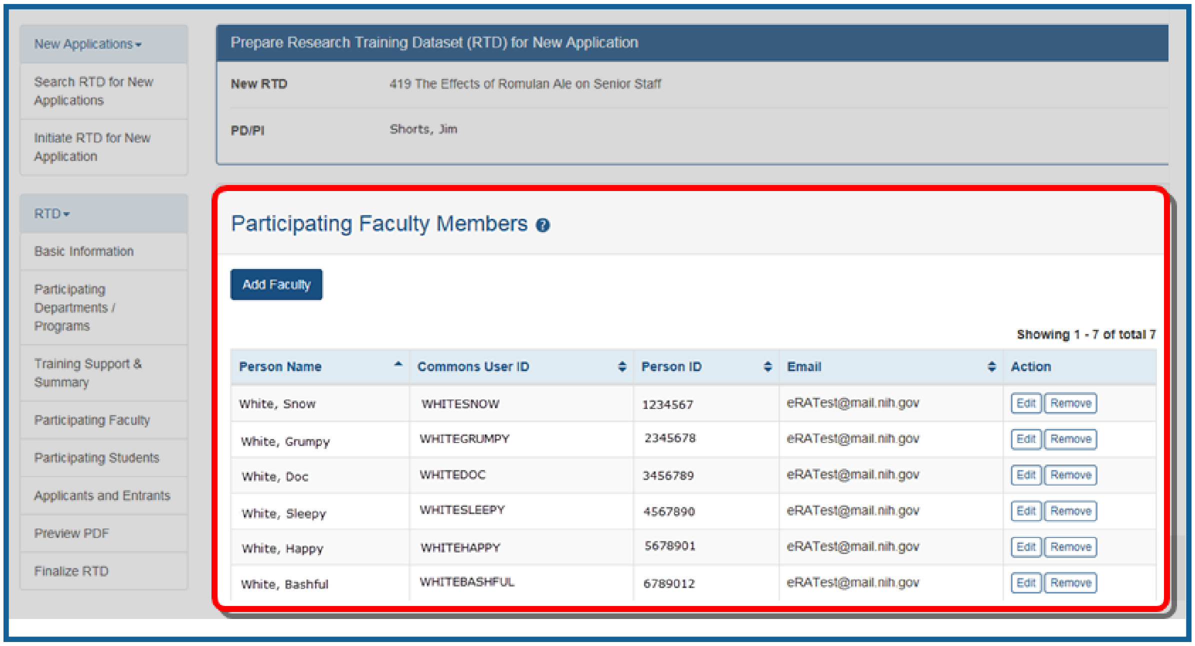


Figure 23: Participating Faculty Members

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.

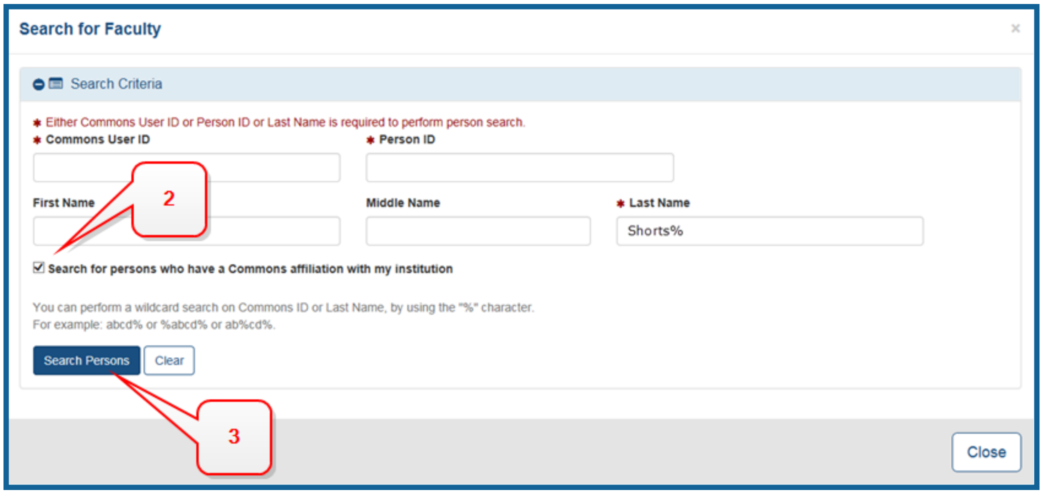
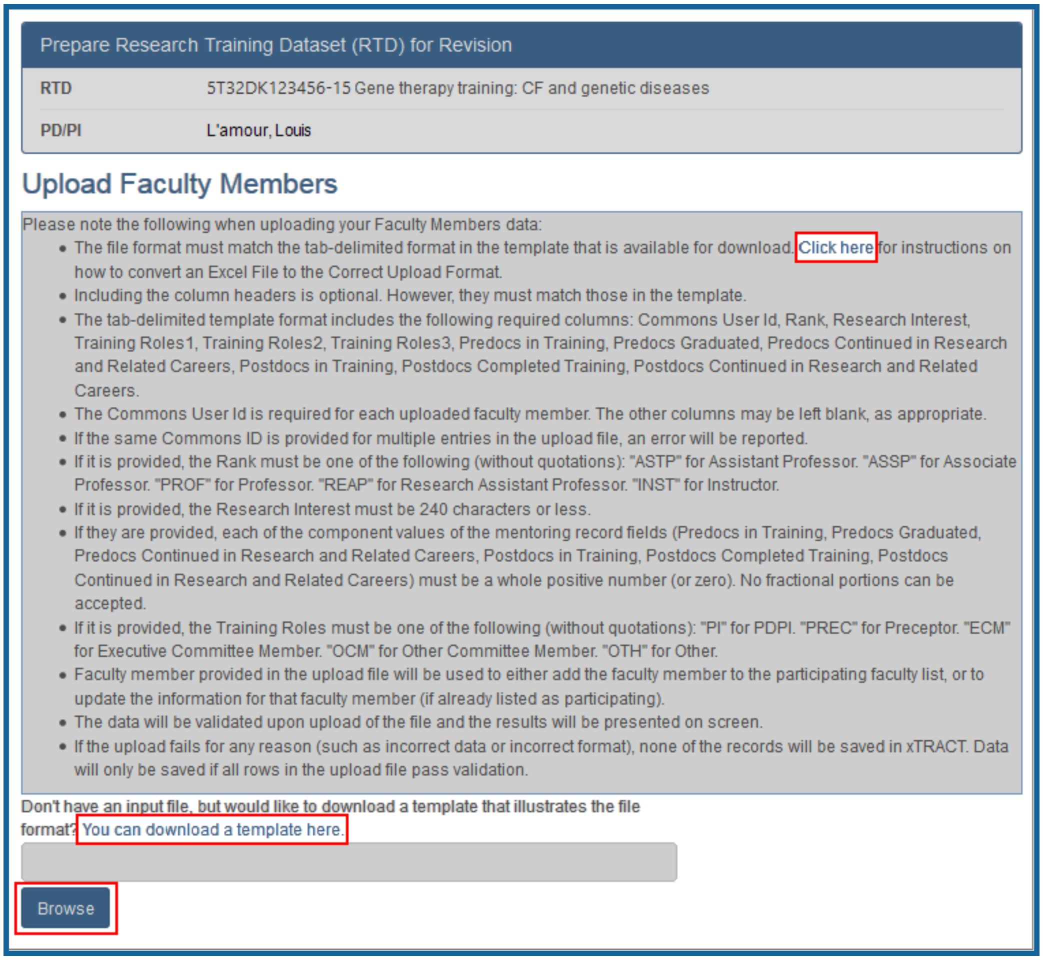


Figure 24: Search for Faculty

3. 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.

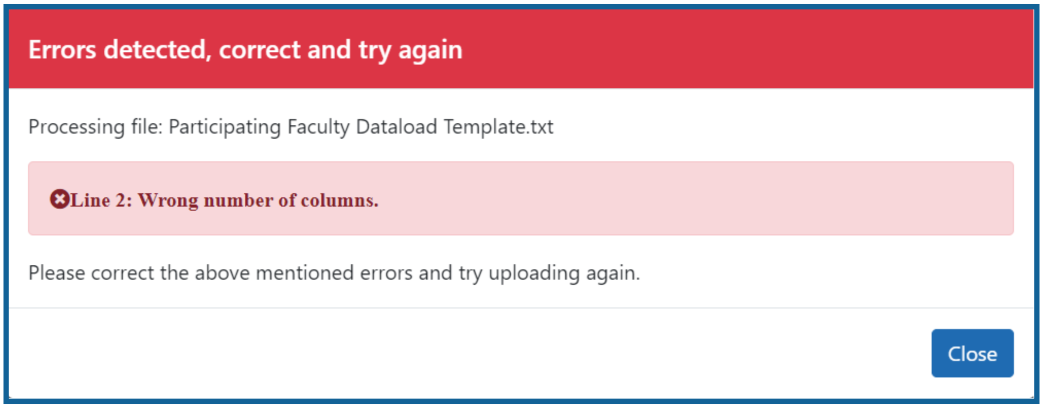
How Do I Add Faculty Via a Bulk Upload?

- Select the **Upload Participating Faculty** button below the table.
  1. 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.

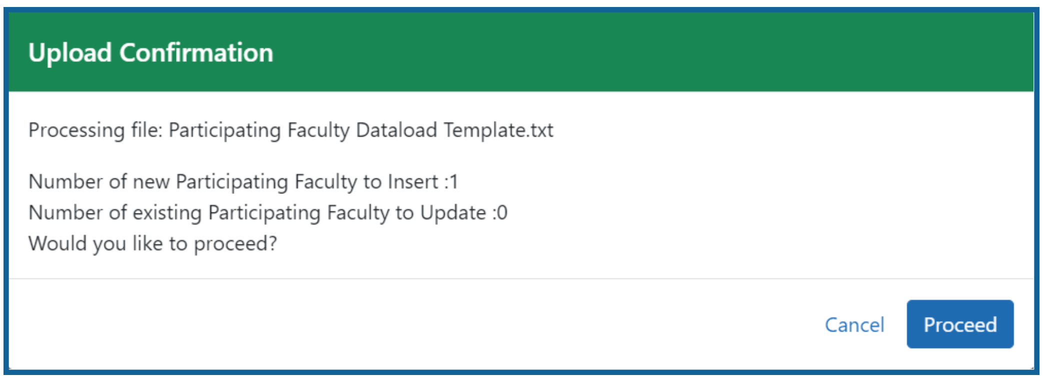


2. Once the upload file has been prepared, use the **browse** link to select and upload the file.
3. If there are any errors in the upload file, a message will appear above the file-name with a link to details of the errors. These errors will need to be cor-

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 (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.

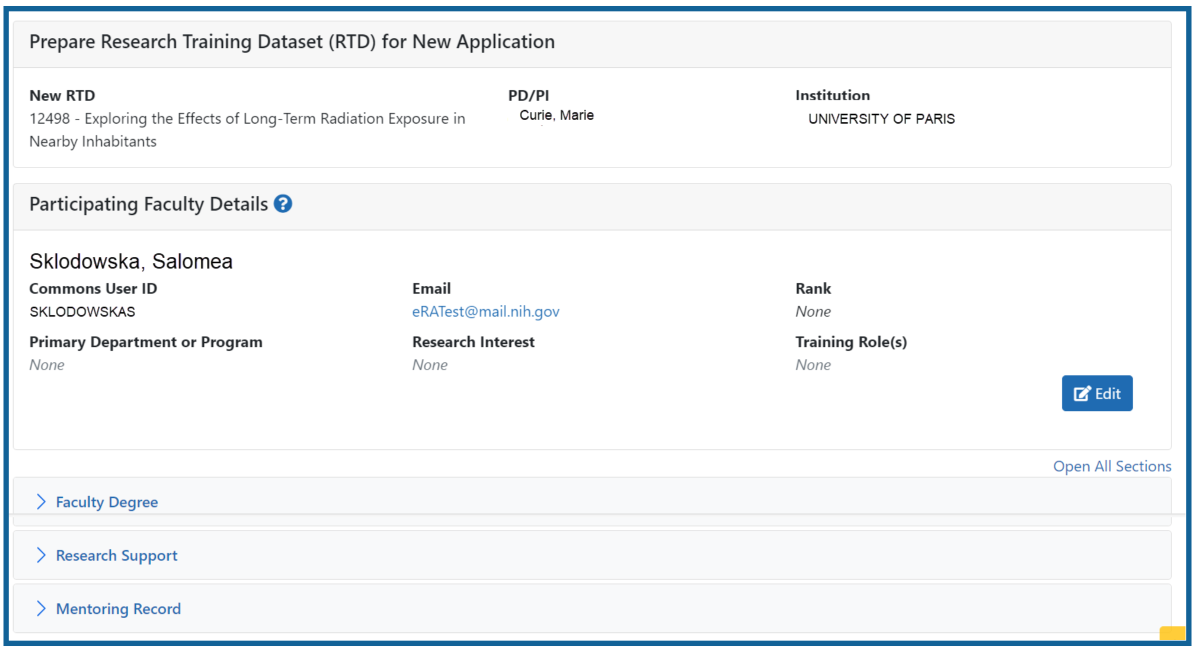


Figure 25: Participating Faculty Details

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

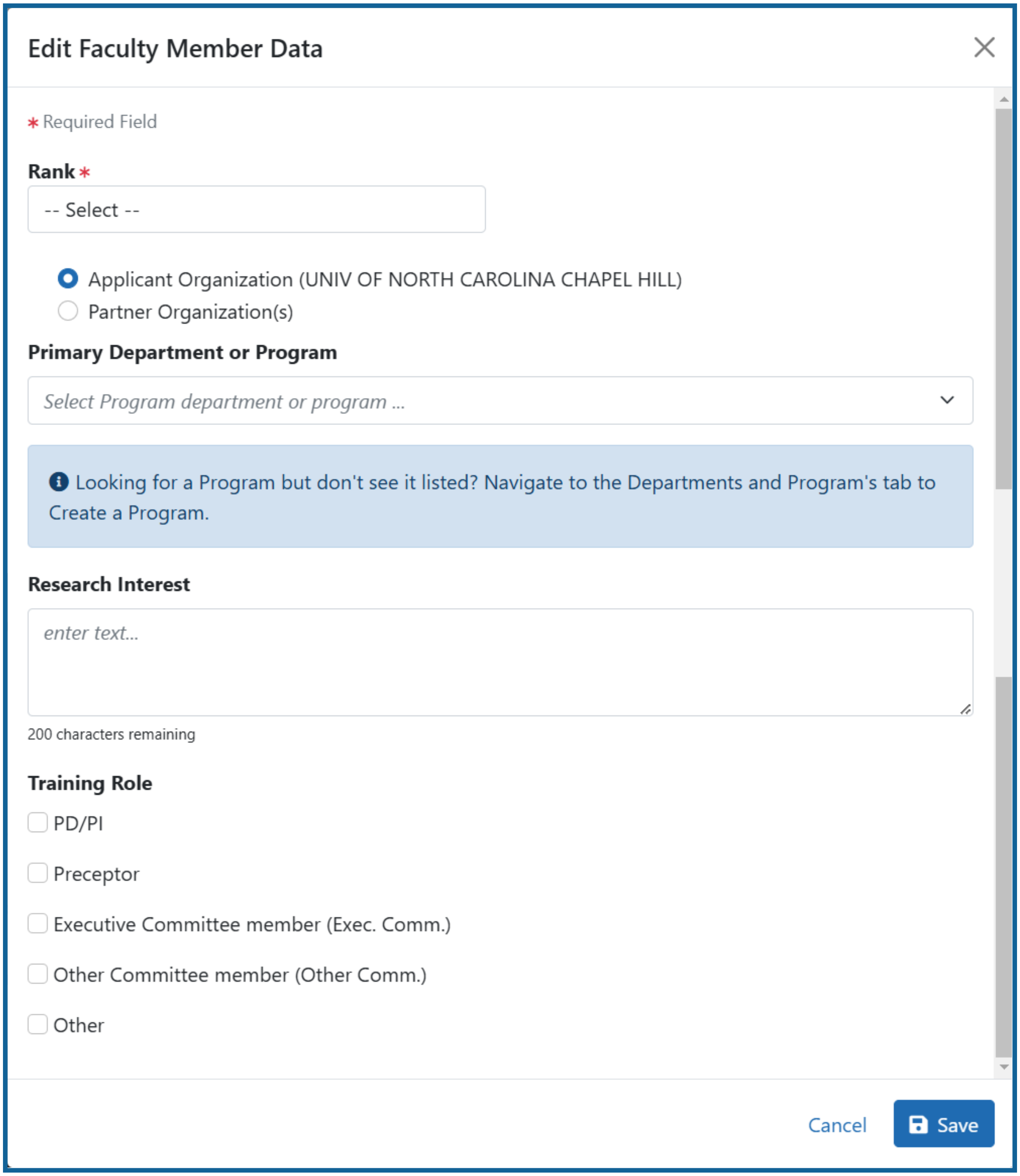
Participating Faculty Details

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:



2. 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

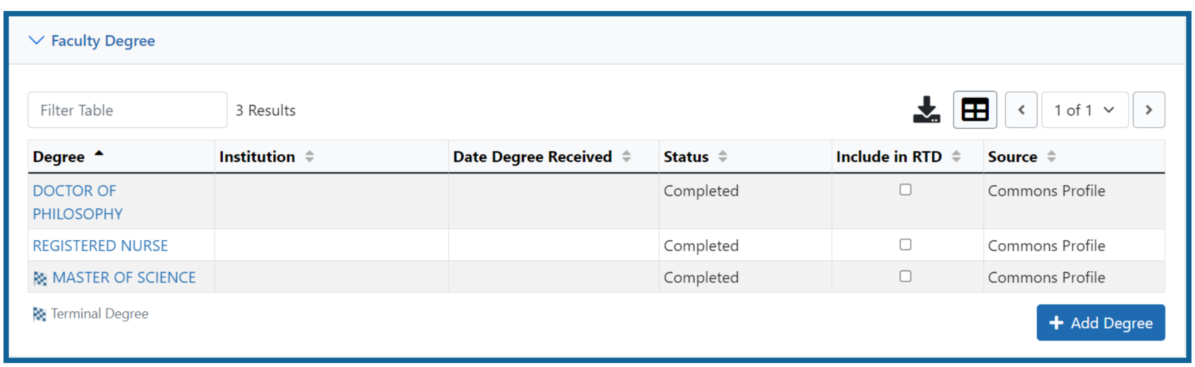
hold non-academic positions, such as in government or the private sector. The **Other Rank** field is enabled only if you select **Other** in the **Rank** drop-down list.

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.



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.
2. 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.

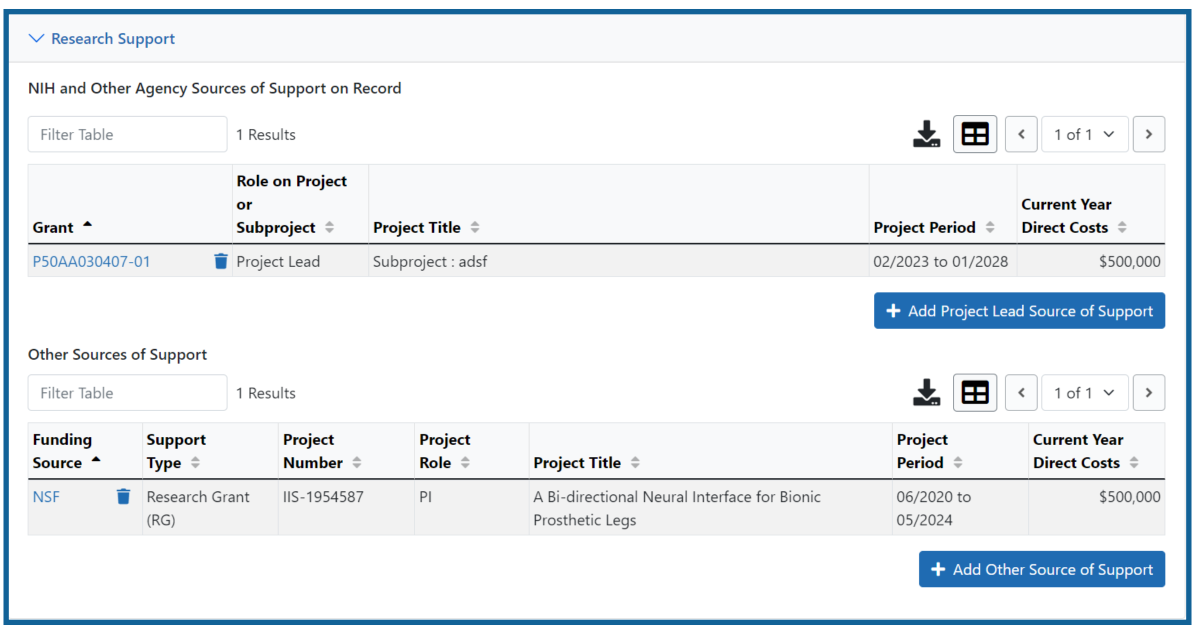
Delete a Degree

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 Other Agency Sources of Support on Record

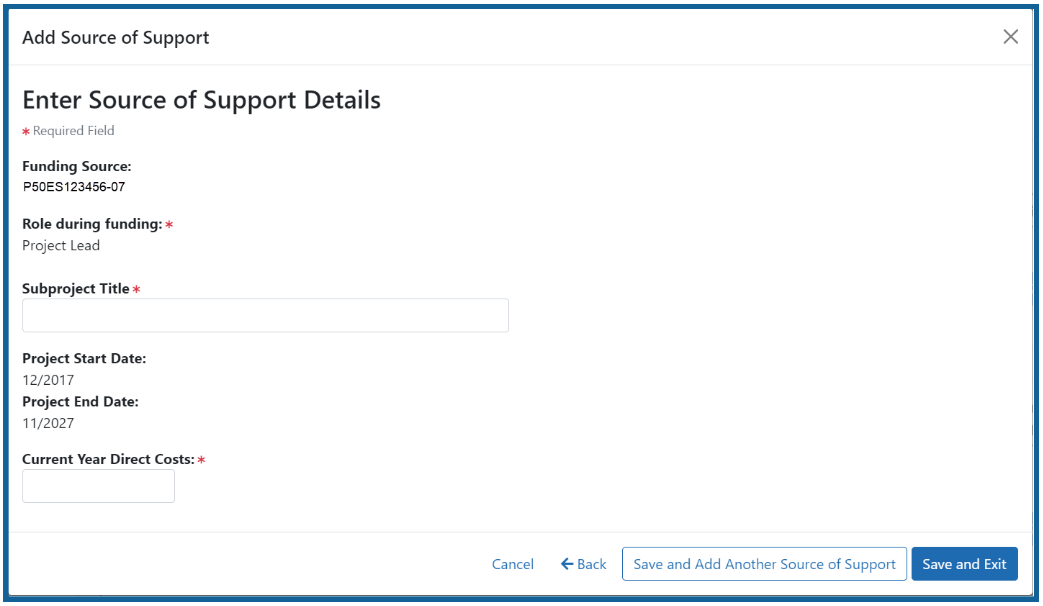
Use this section to report currently-funded, active NIH or other Agency grants on which this faculty member is working. This list might be automatically populated with records if the faculty member is on record as being funded from NIH and other grants.gov systems. Records that are automatically populated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

1. 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.
3. Enter search criteria in the *Add Source of Support* window and click the **Search** button.
4. In the search results, click the **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 sub-project.



6. 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.

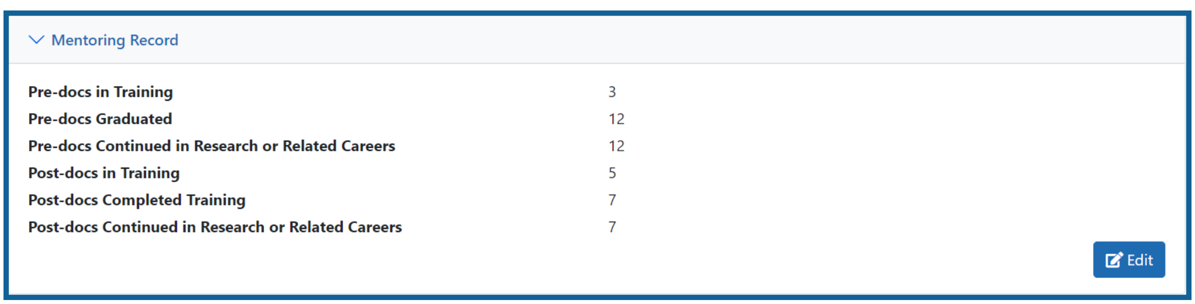
To add additional support:

1. 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 **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.
5. 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.



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.

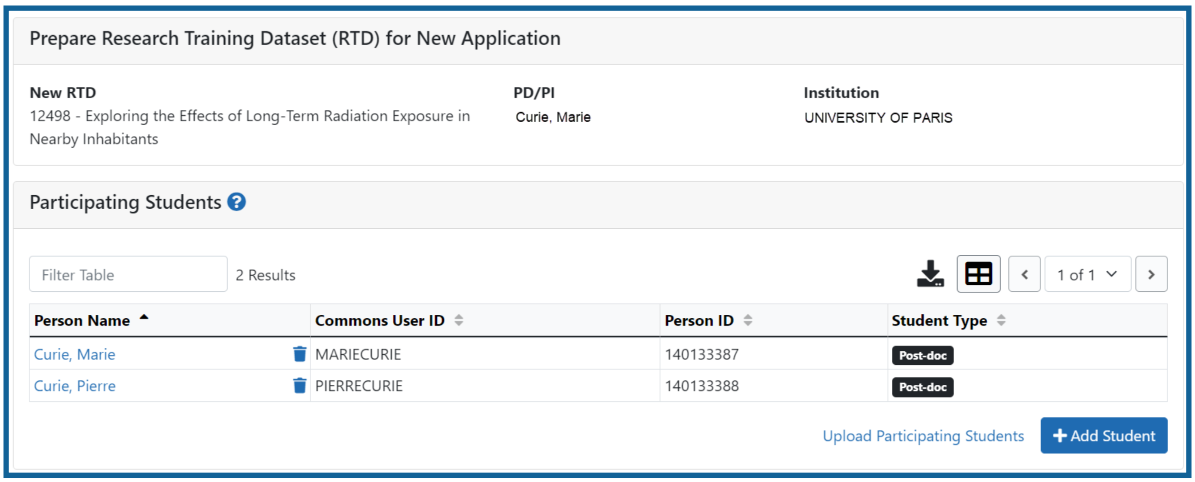


Figure 26: Participating Students

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.

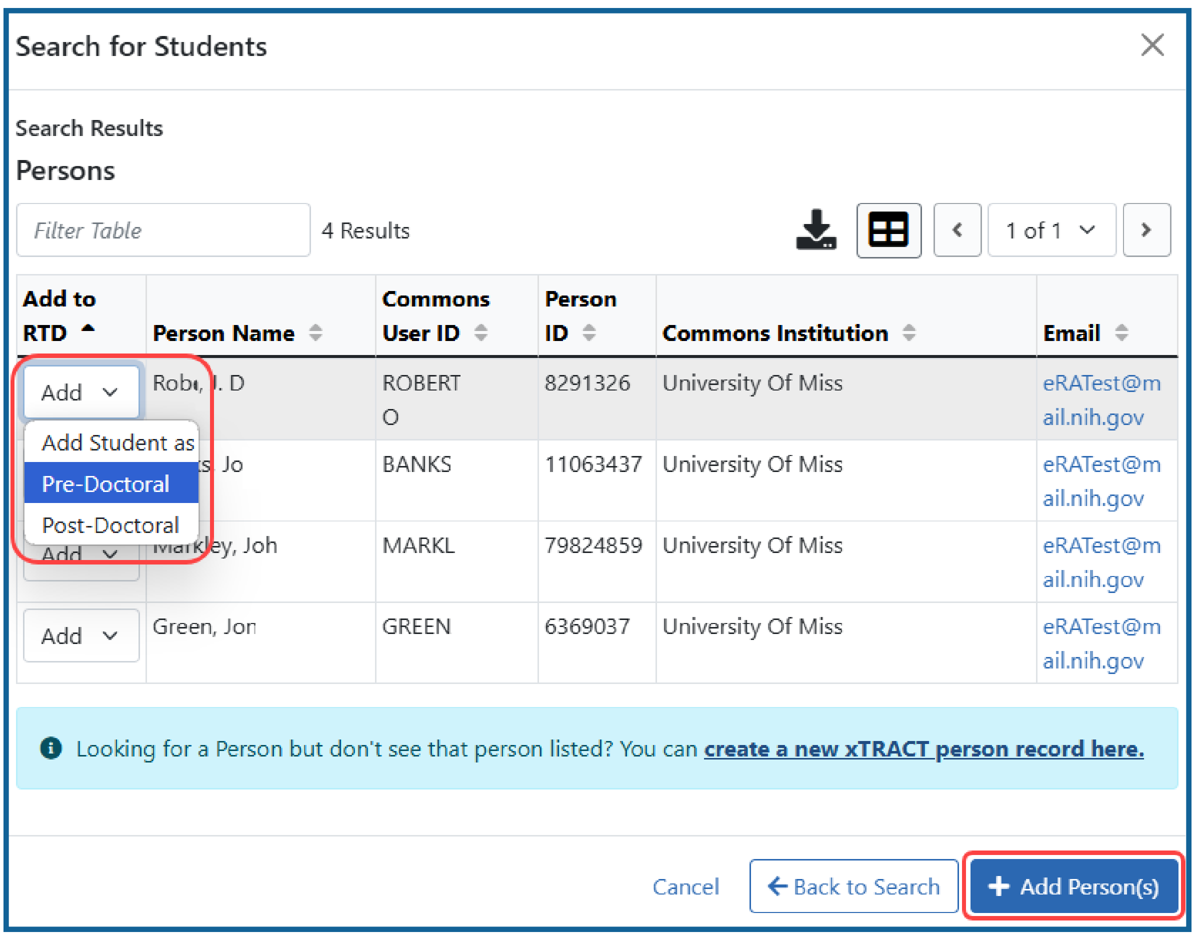


Figure 27: Adding Students for a Non-T34 award (Pre-Doctoral and Post-Doctoral students)

3. 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.

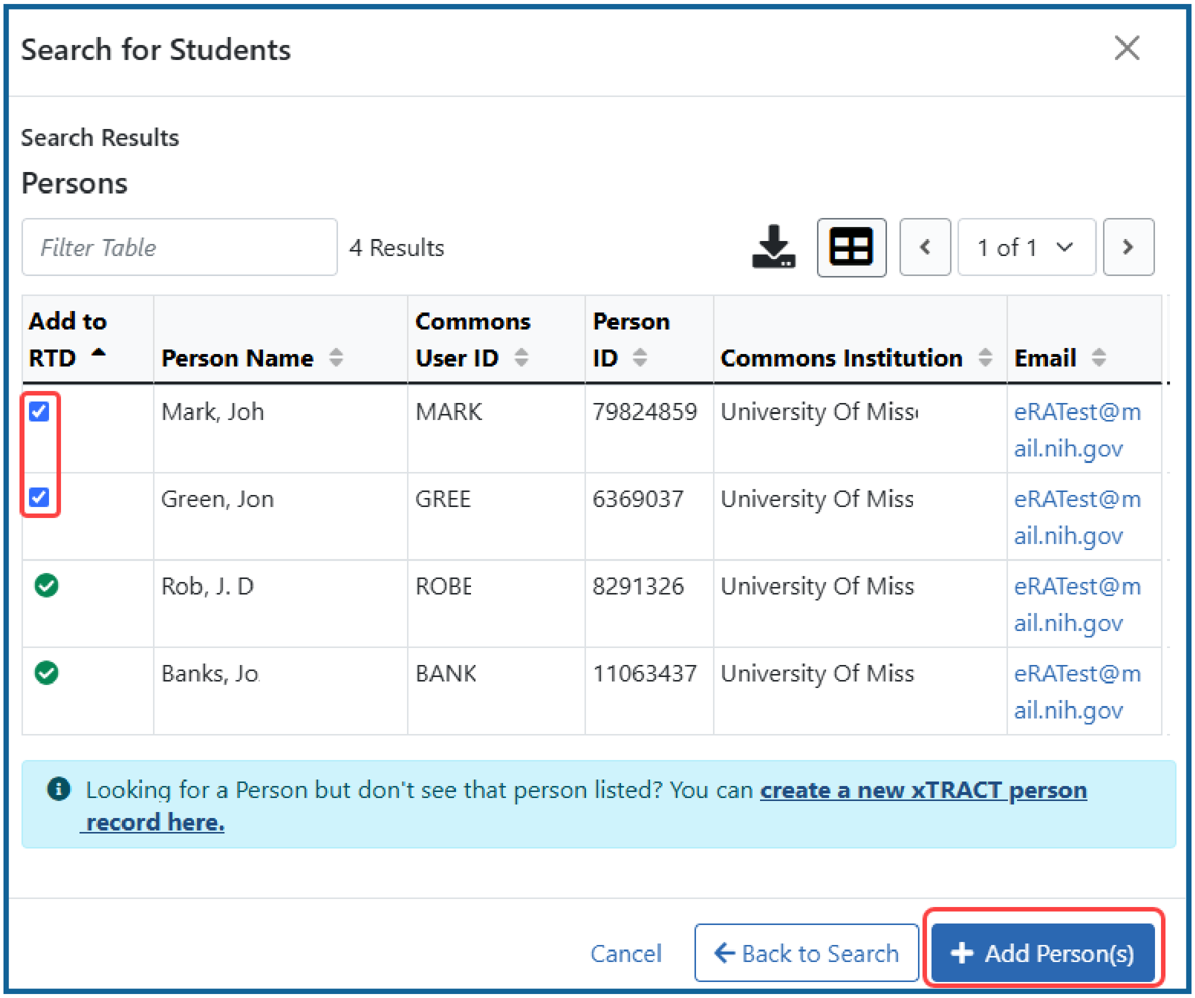


Figure 28: Adding Students for a T34 award (Students are added as undergraduates by default)

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  icon 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:**
        1. 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.
        4. 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.

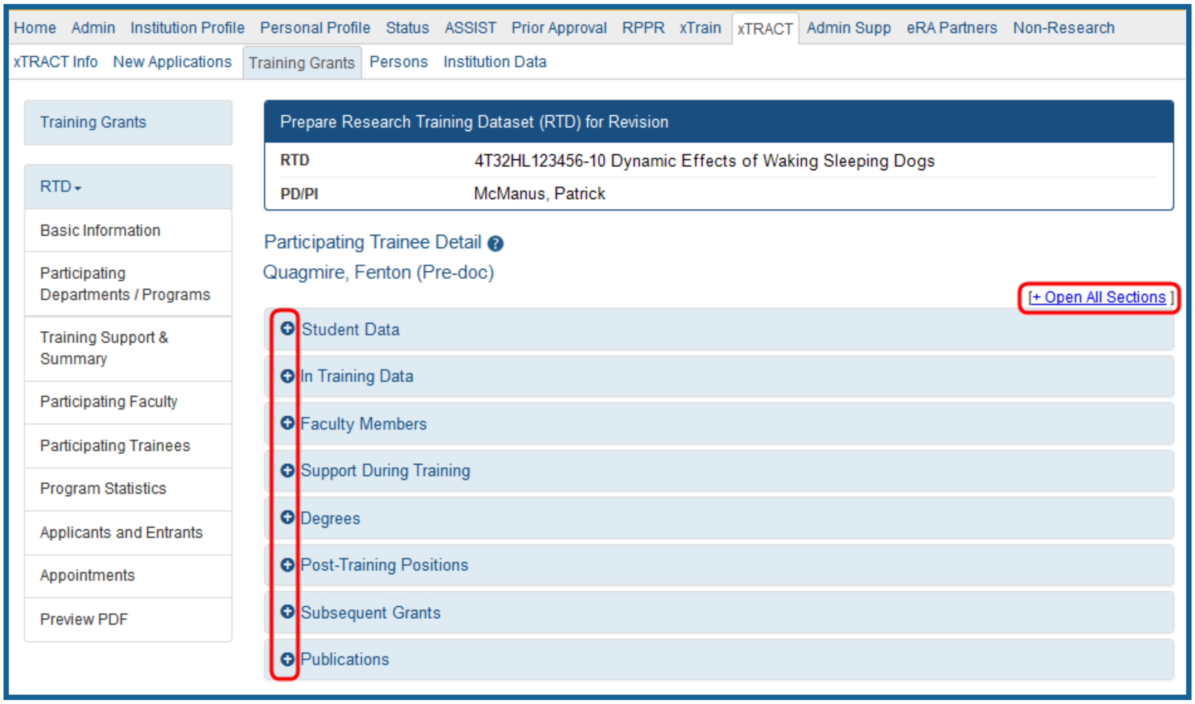


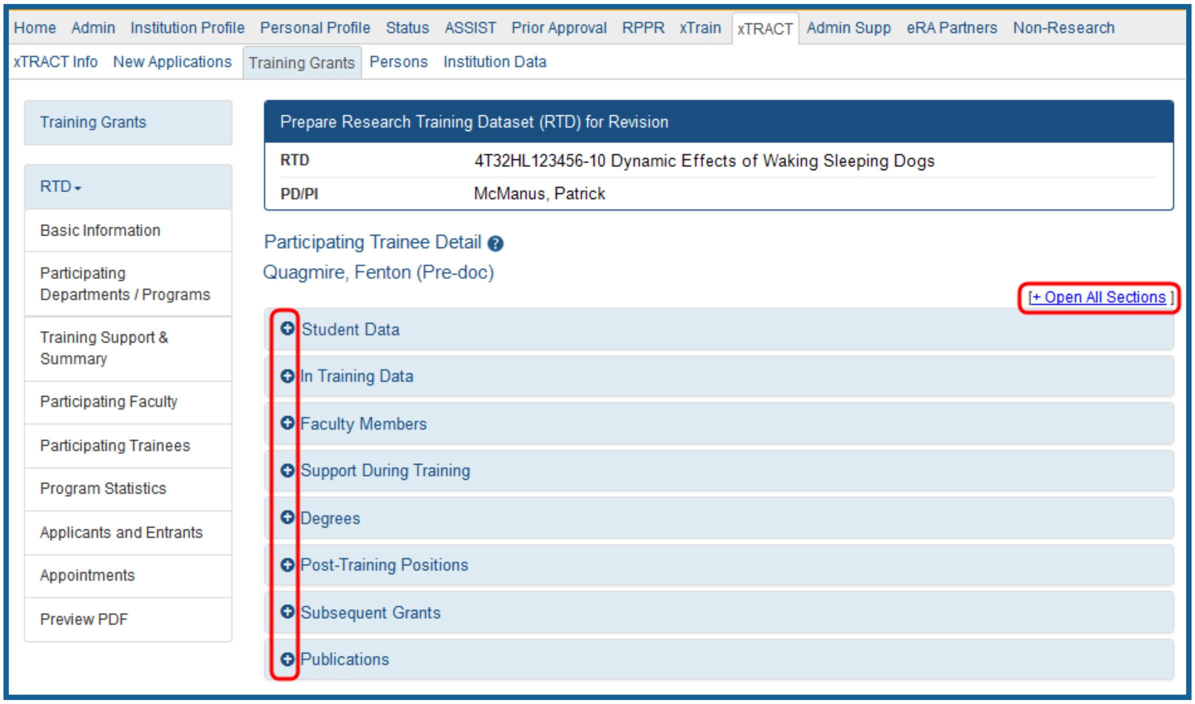
Figure 29: Participating Student Details

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.



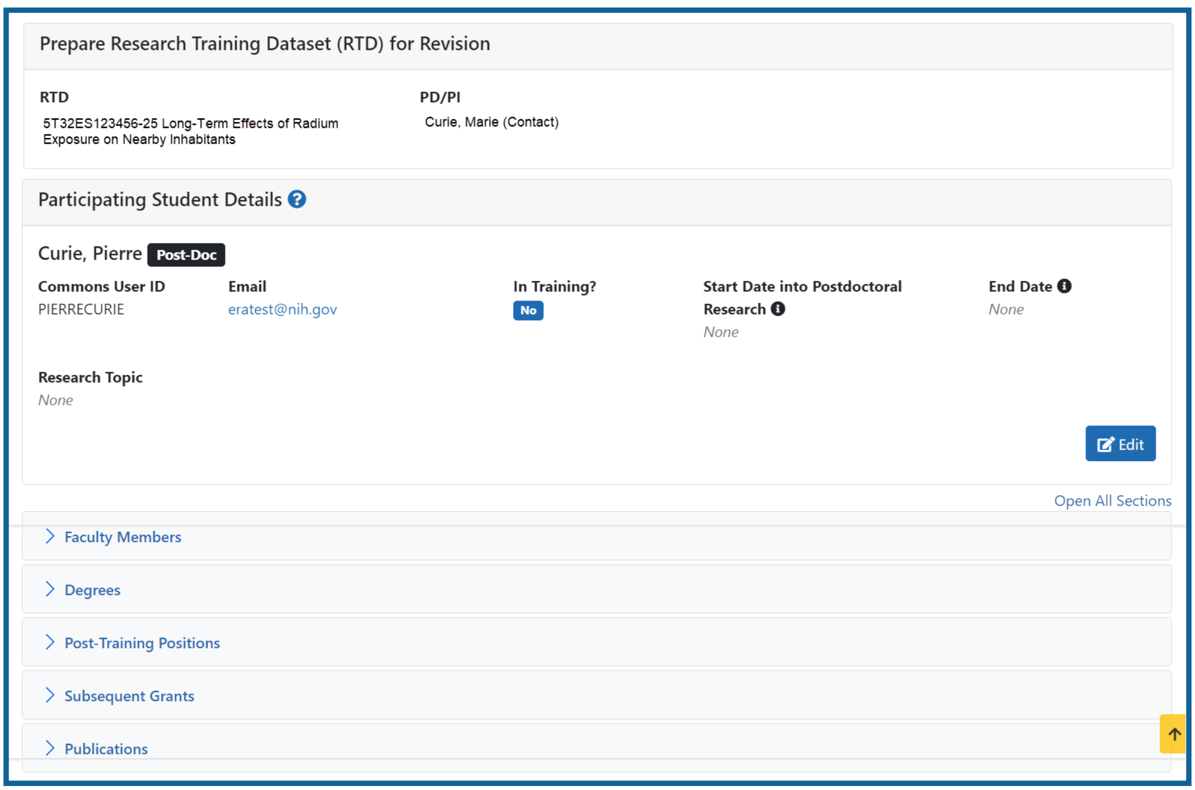


Figure 30: Participating Student Details

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:

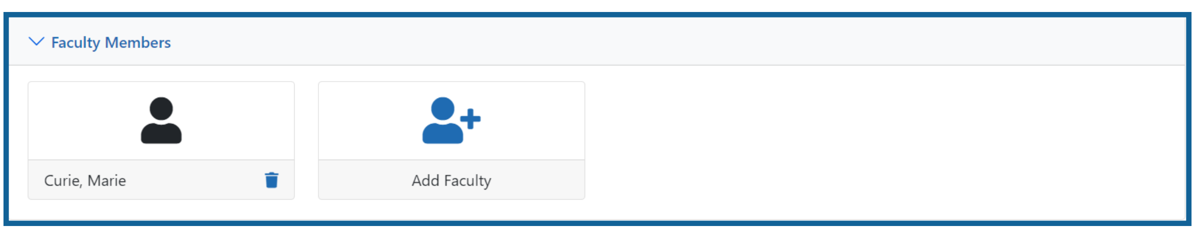
- Commons User ID or Person ID
- Email
- In Training?
- Start Date
- End Date
- Research Topic

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.



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.

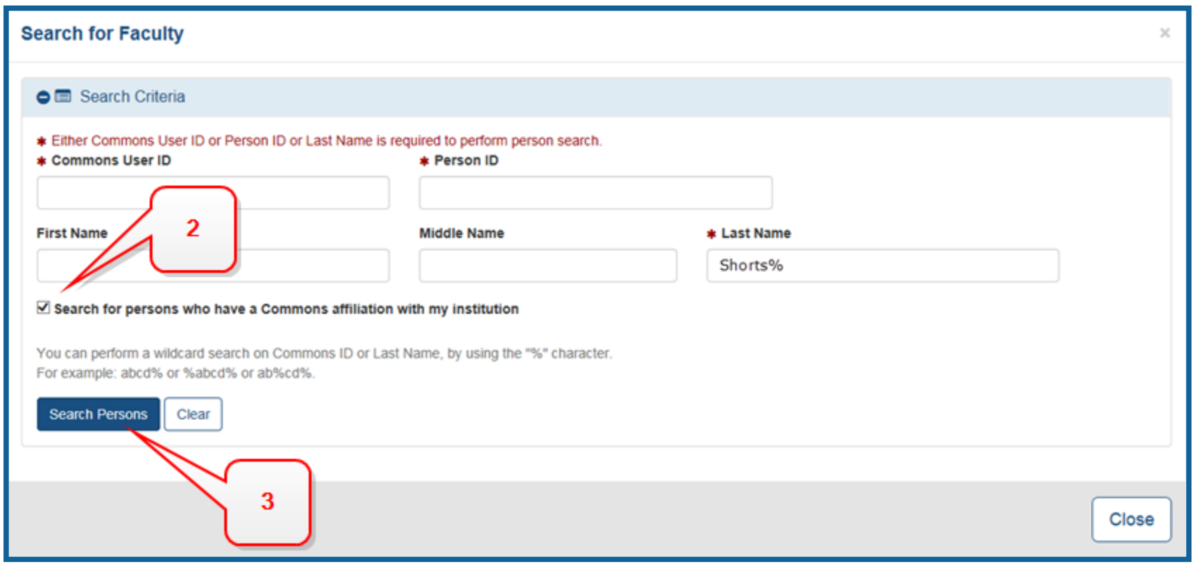


Figure 31: Search Faculty Member

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.

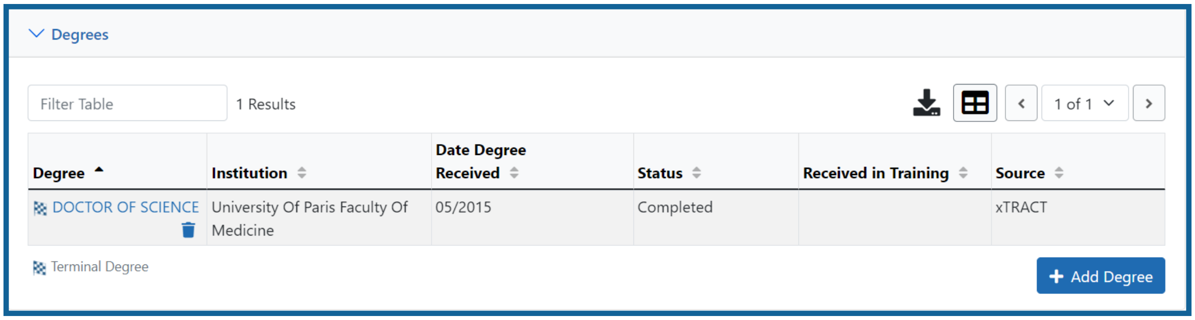
7. Search for and add other faculty as necessary, repeating the steps above.

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.



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:

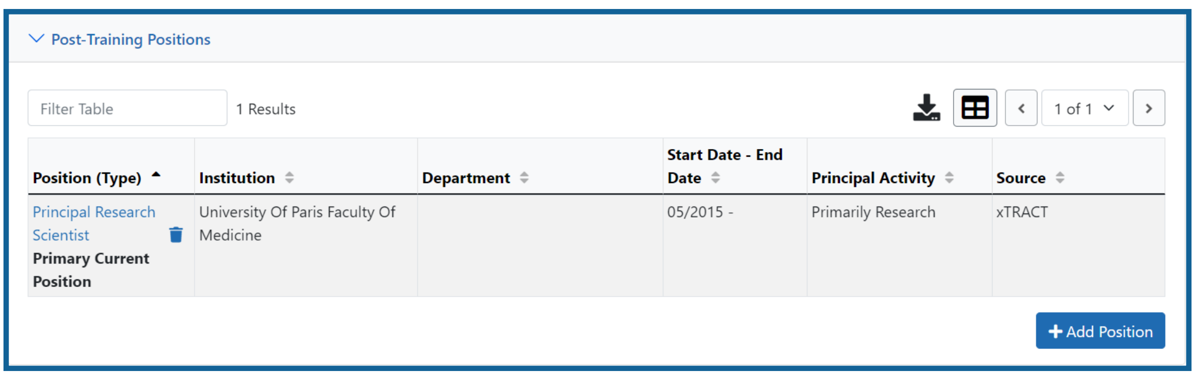
1. Select the **Add Degree** button.
2. Update the fields in the *Create a New Degree* pop-up:
   - **Degree**: Select from the list
   - **Other Degree Text**: Enter if Degree selected is *OTH (other type of degree)* or another category like BOTH, DDOT, DOTH, MDOT, MOTH, and VDOT.
   - **Degree Date**: 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 **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.



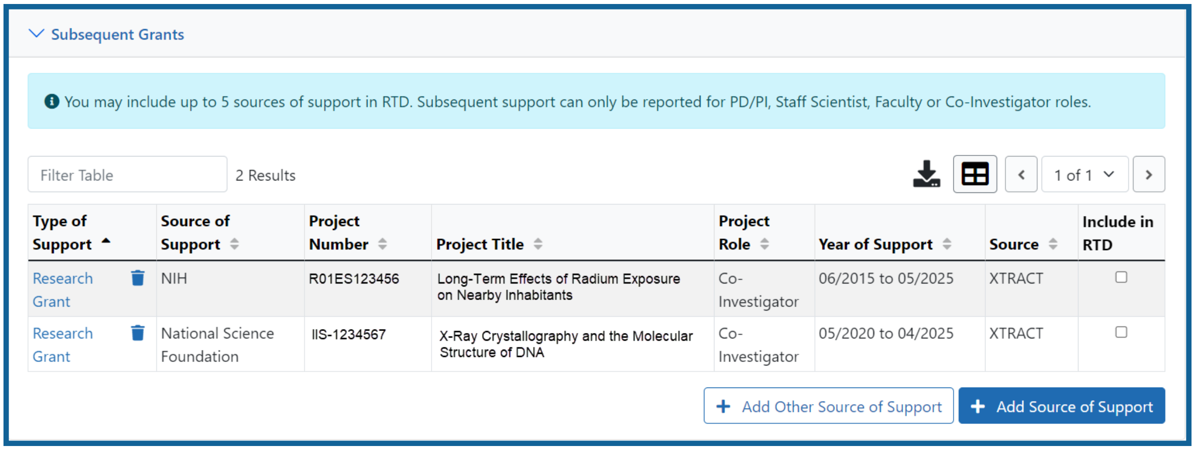
The **Source** of positions is displayed as *xTRACT* (meaning the position was added or updated for the person in xTRACT) or as *Commons Profile* (meaning the position is from the Commons Personal Profile of the person).

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.



Type 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	☐
Research Grant	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.

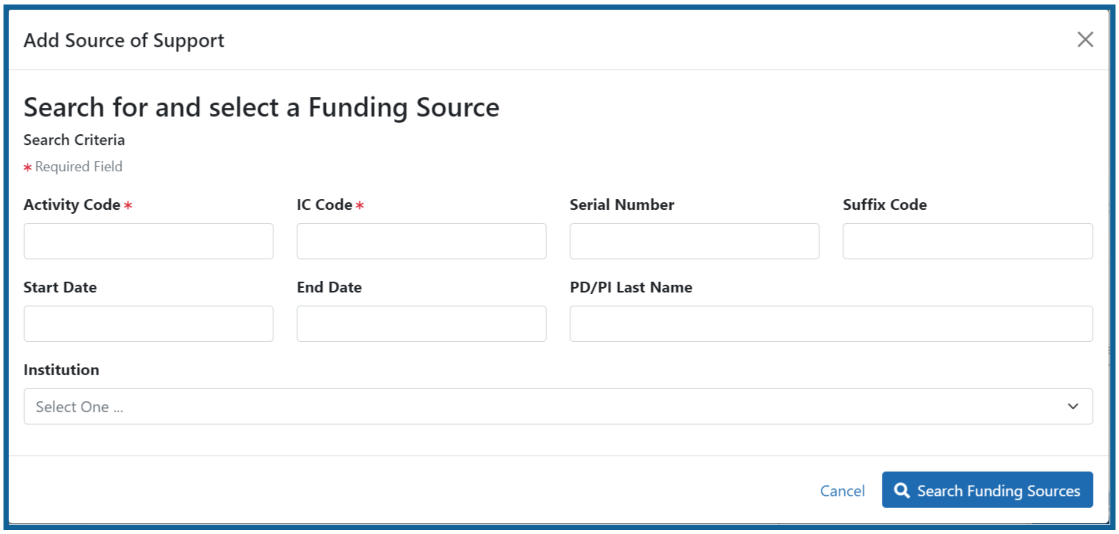
Add Other Source of Support button: Add sources of grant support received from non-NIH/Agency sources.

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.

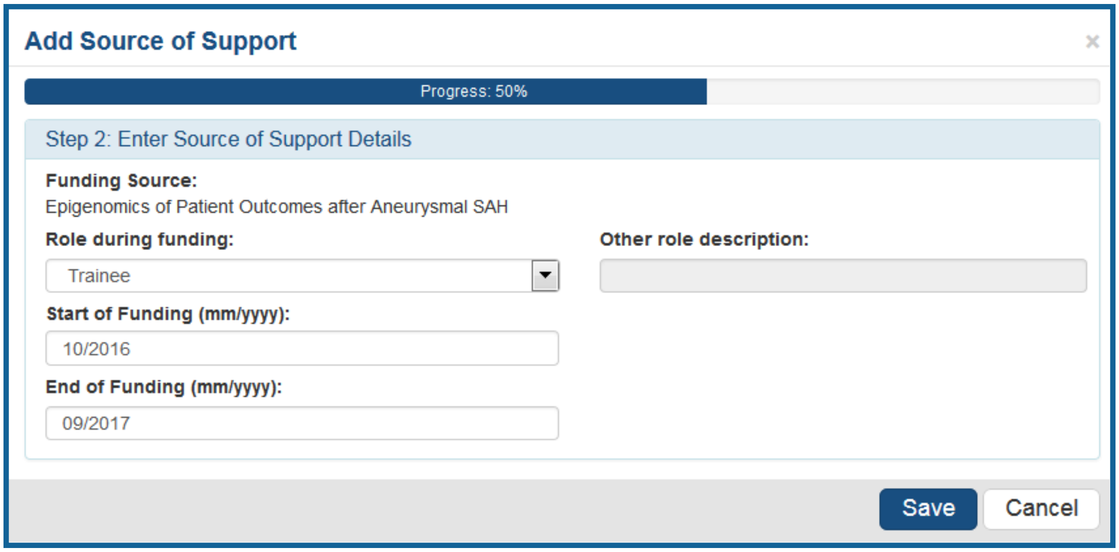
Sources of support that you include on the RTD must list the trainee/student in a project role such as PD/PI, co-investigator, faculty collaborator, or staff scientist. If you mark the checkbox of a record with a non-supported project role, an error will occur when you mark the checkbox, which states: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



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. 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.

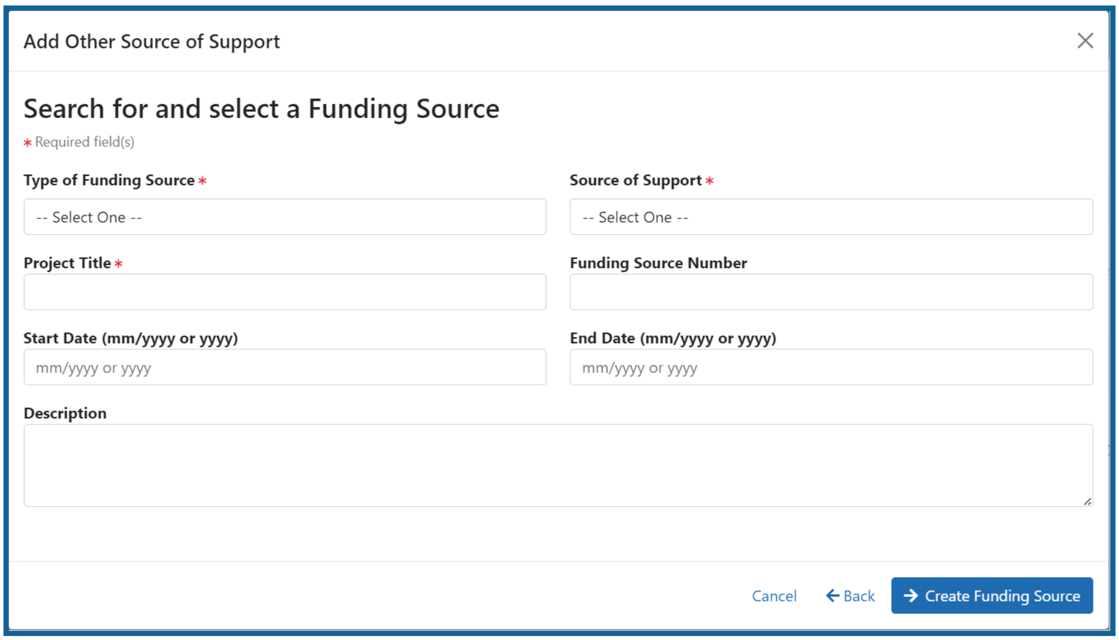


6. Click the **Save and Exit** button. Alternatively, if you want to add another funding source, click the **Save and Add Another Source of Support** button to be returned to the funding search popup.

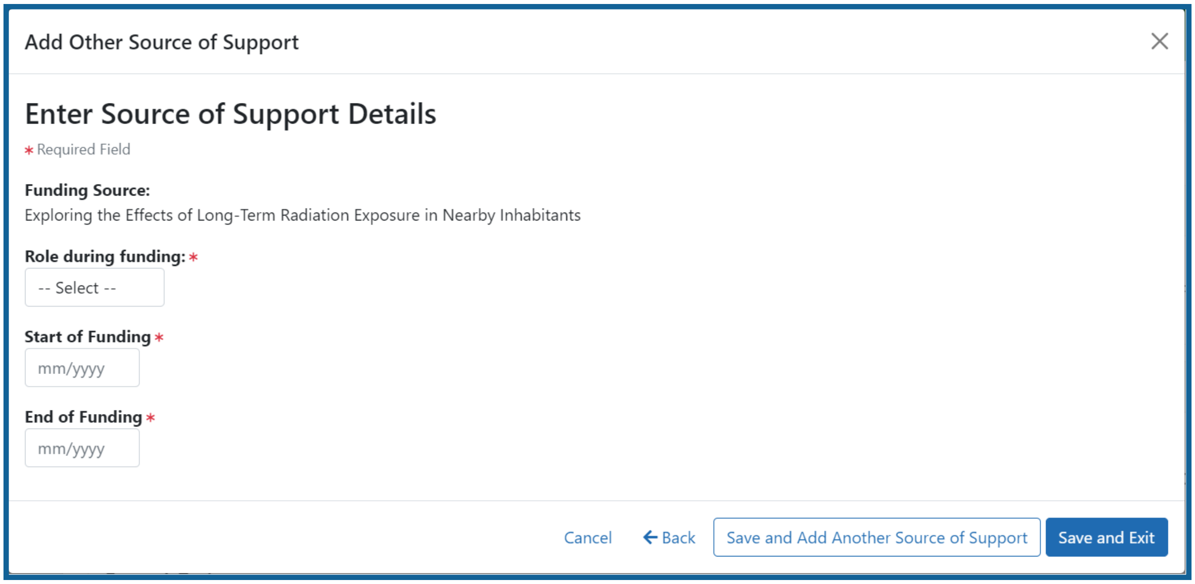
To add support from non-NIH/Agency sources of support:

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

5. Search for support by entering search criteria.
6. Click the **Search Funding Sources** button.
7. In the search results, click the **Select 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**.



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.



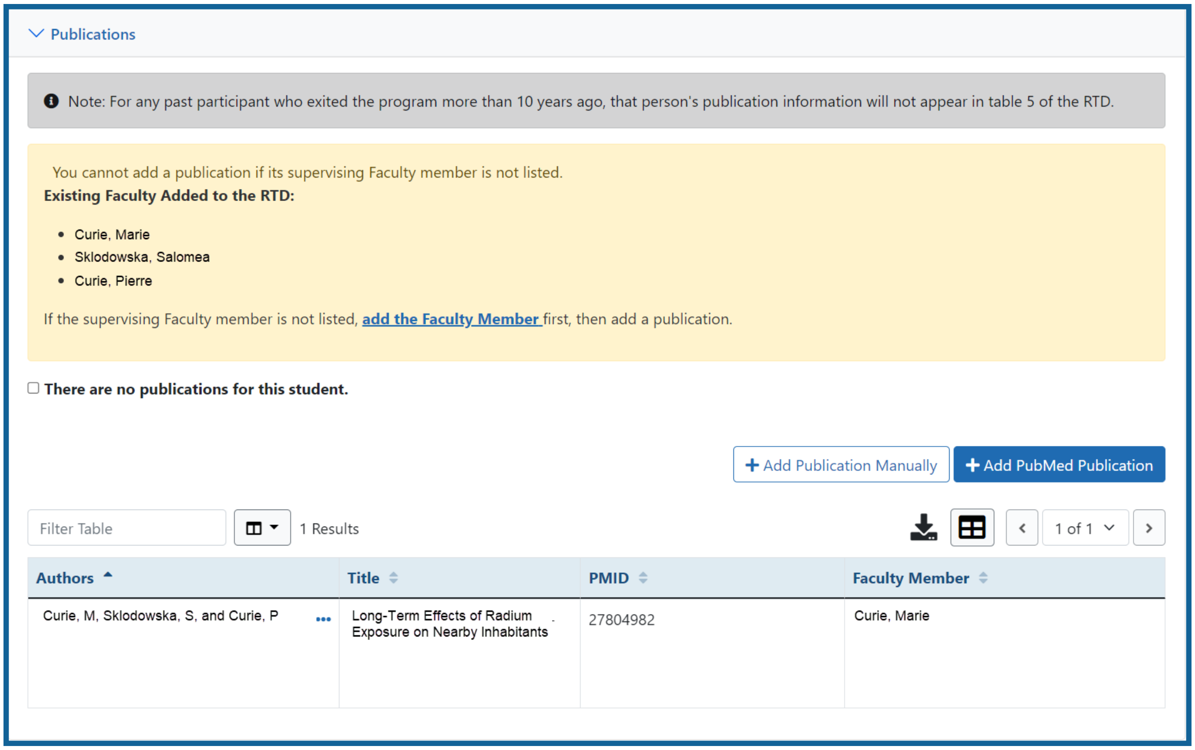
c. Select an option from the **Role during funding** dropdown.

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.



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:

1. 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**.
3. 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.

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.

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. 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 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).

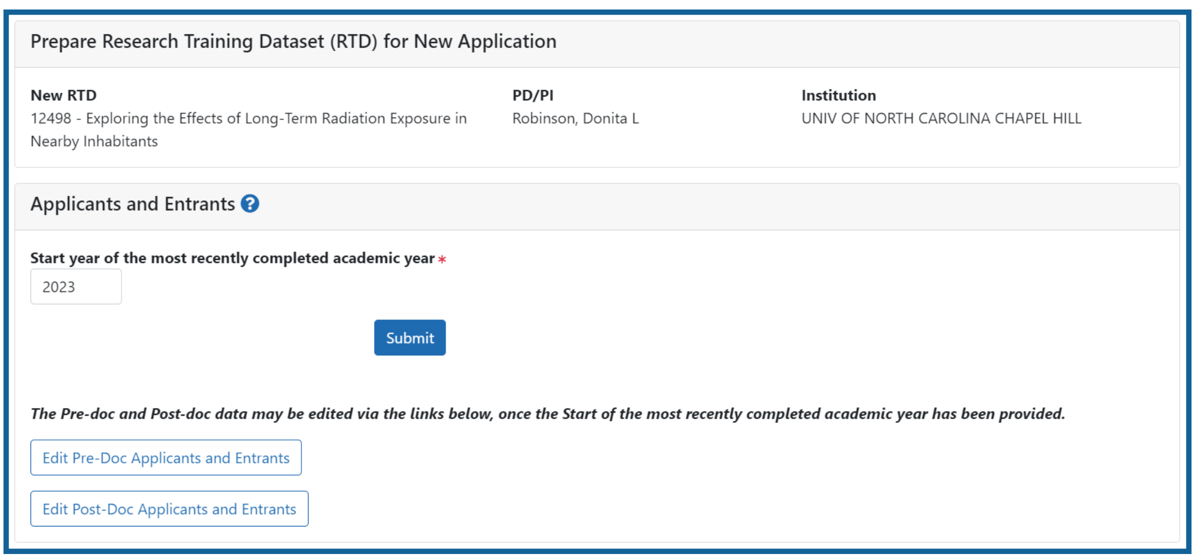


Figure 32: Applicants and Entrants

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.

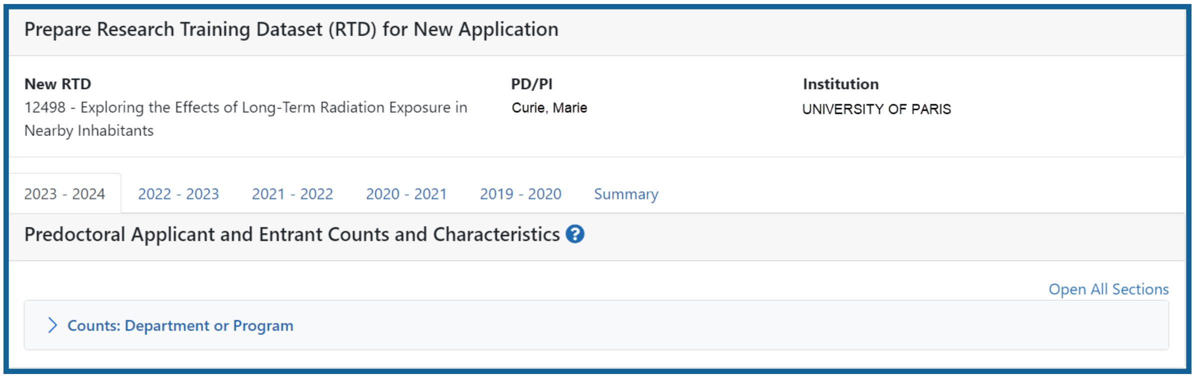


Figure 33: Predoctoral Applicant and Entrant Counts and Characteristics

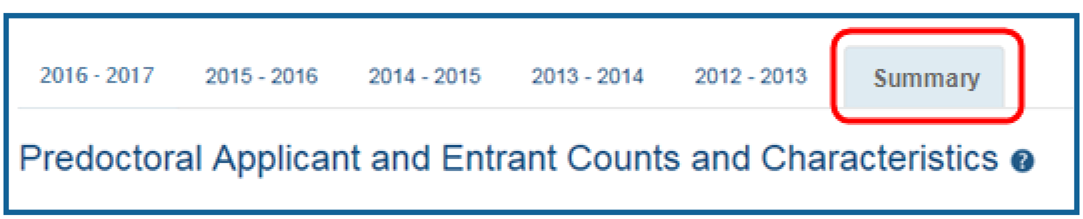
Counts table

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.

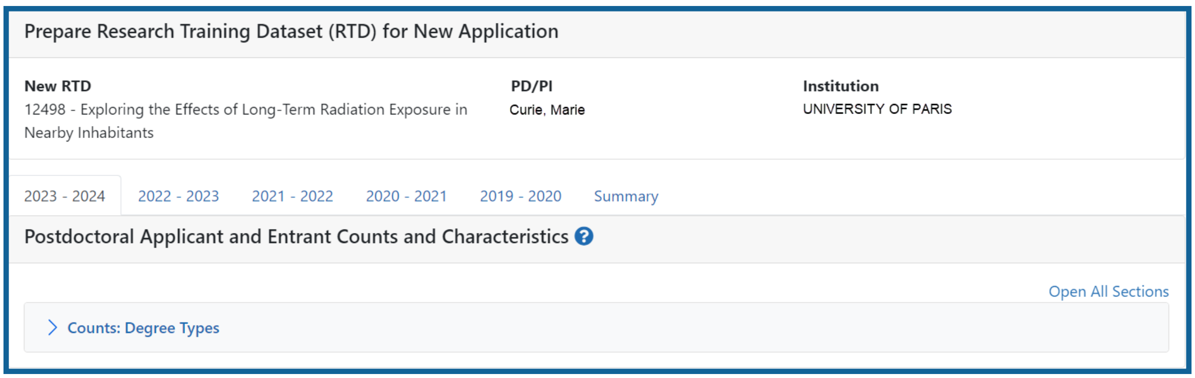


Figure 34: Postdoctoral Applicant and Entrants Counts and Characteristics

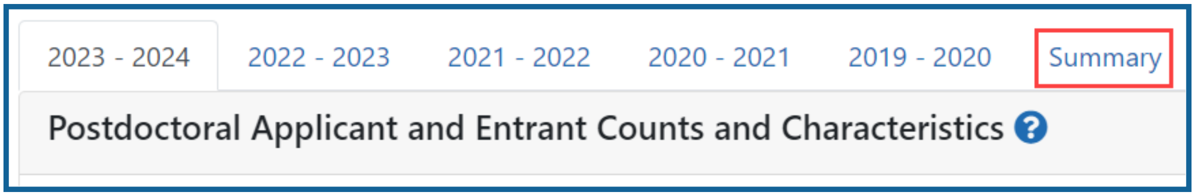
Counts table

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.

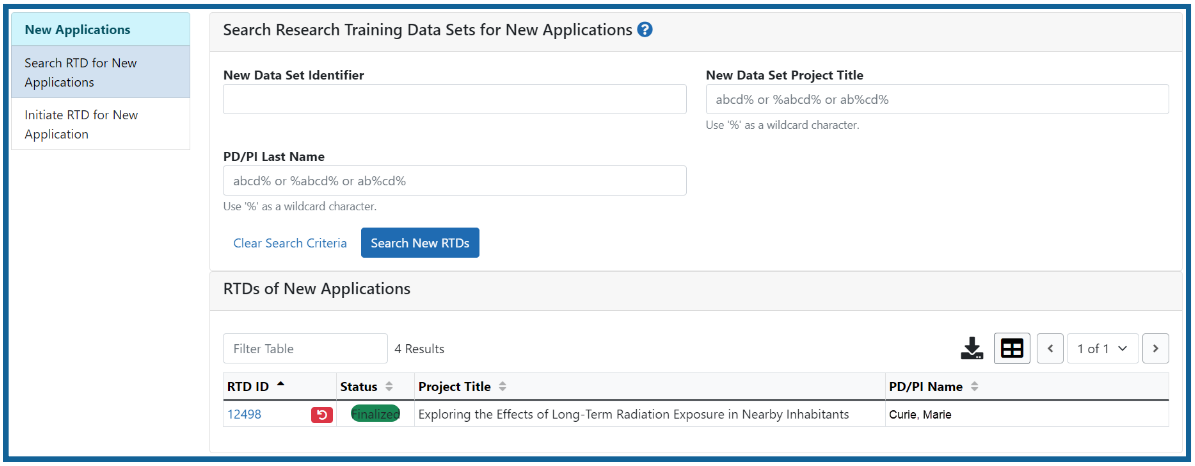
   A confirmation message warns: Are you sure you want to finalized this RTD? Once finalized, the RTD cannot be edited?

   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.



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.

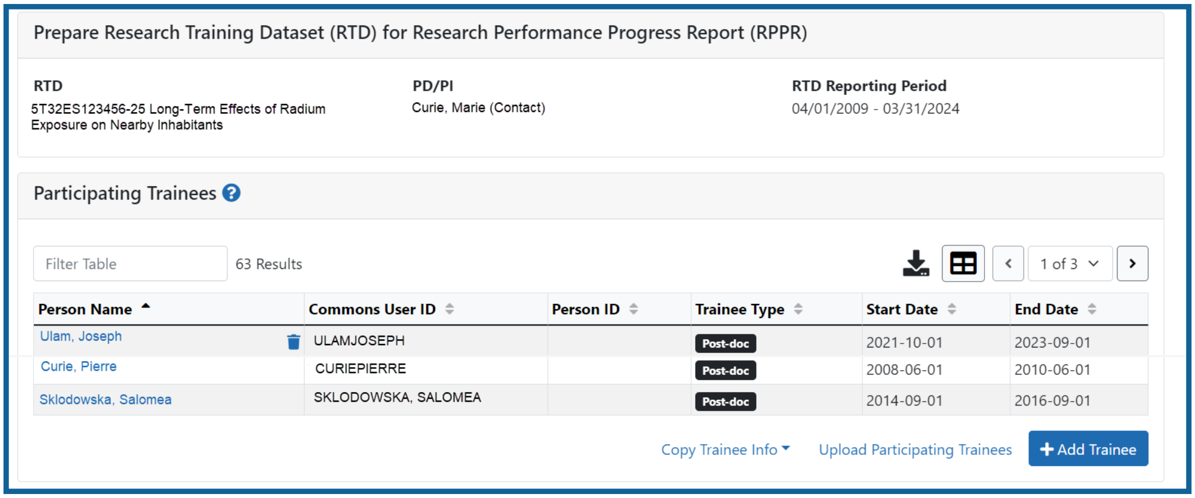
The *Prepare Research Training Dataset (RTD) for Research Performance Progress Report (RPPR)* screen opens for the selected training grant. Use the links listed under **RTD** on the left side of the screen to maintain the specific sections of the RTD:

- 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.



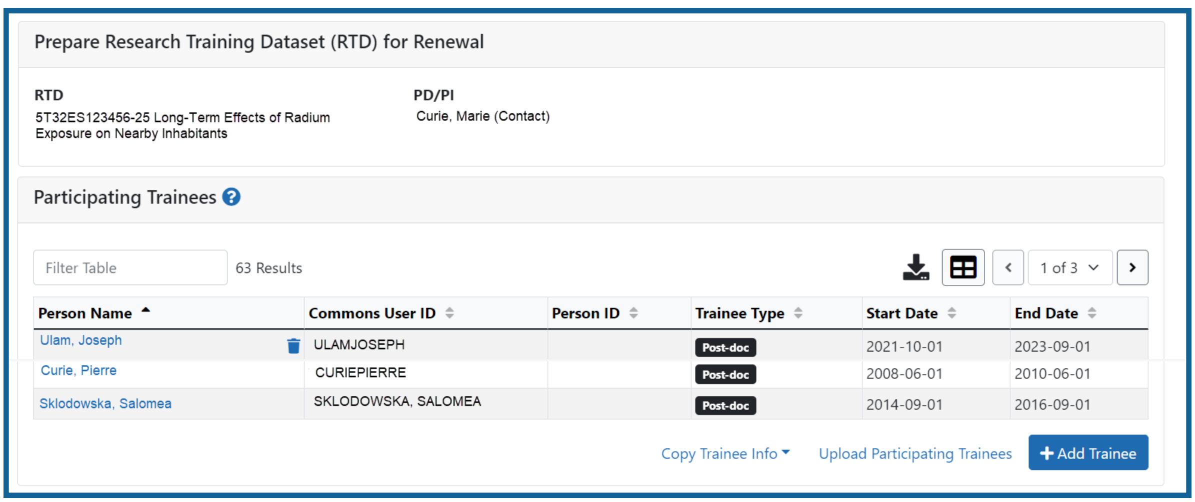


Figure 35: Participating Trainees

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.

   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**

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:**
      1. 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.
      4. 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.

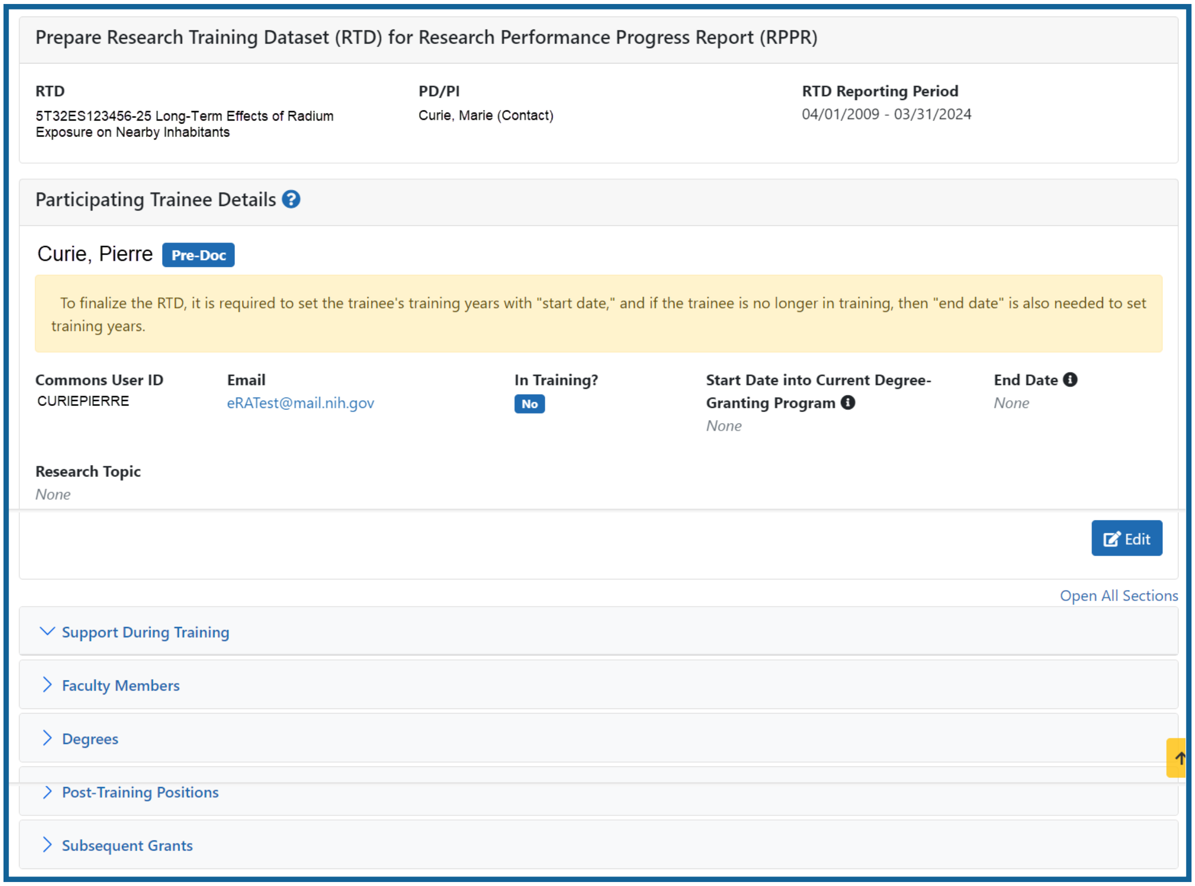


Figure 37: Participating Trainee Detail (RPPR)

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.

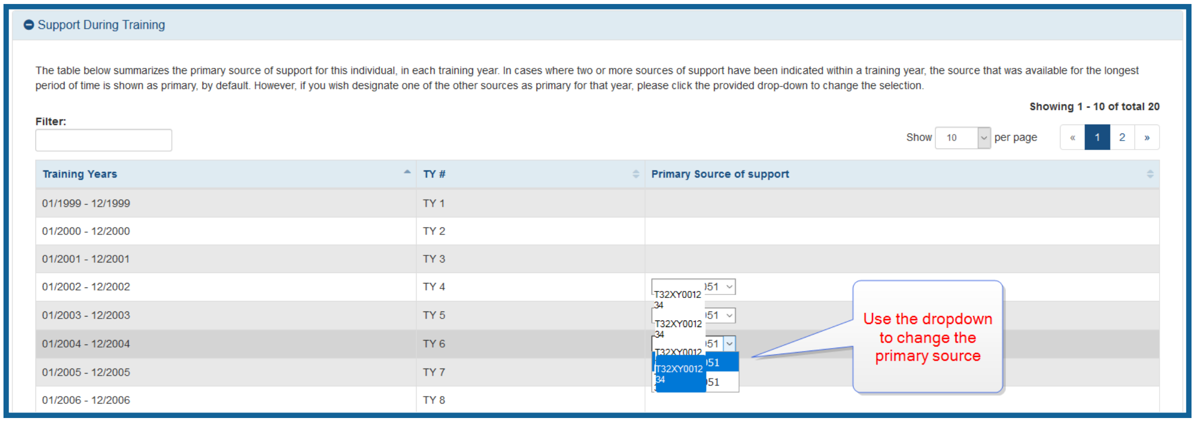
Support During Training

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.

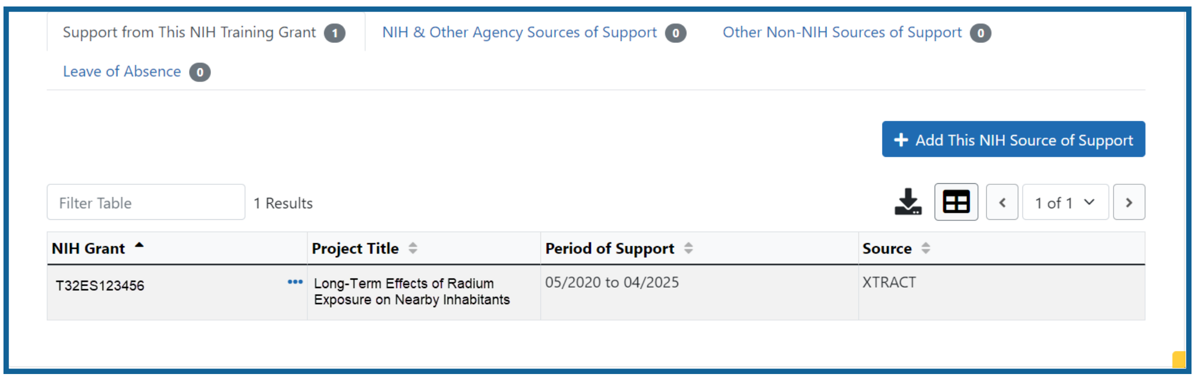
After a start date has been added for the trainee in *In Training Data*, the **Training Years (TYs)** will be displayed as read-only with corresponding abbreviations for funding sources in **Support During Training**.

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.



Support from This NIH Training Grant

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

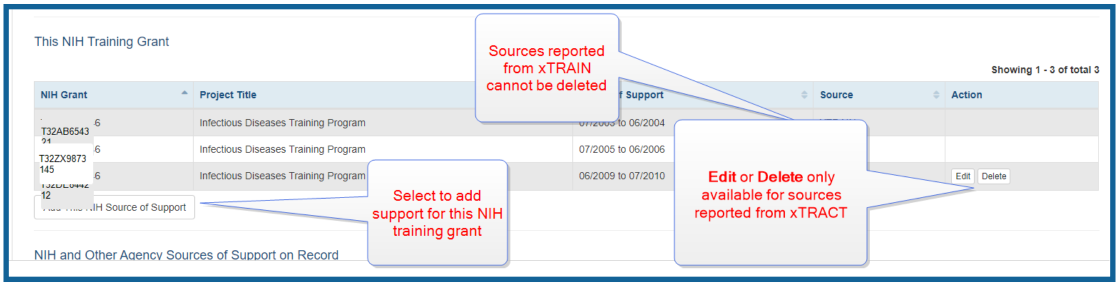


1. Click the **Add This NIH Source of Support** button to add support from **This NIH Training Grant**.
   a. Enter the start and end dates of funding, then click the **Save** button.
2. (Optional) To remove support from **This NIH Training Grant**, click the three-dot ellipsis button and select **Delete**.

NIH & Other Agency Sources of Support

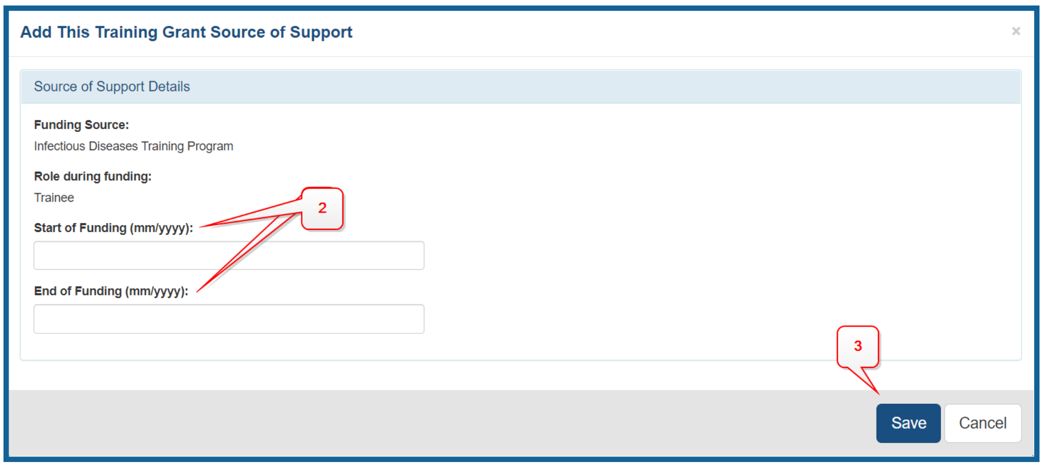
NIH & Other Agency Sources of Support include the Grant number, Project Title, Project Role, Period of Support, and Source.

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



To add additional NIH or Other Agency support:

1. Select the **Add Source of Support** button to open the Add Source of Support pop-up.

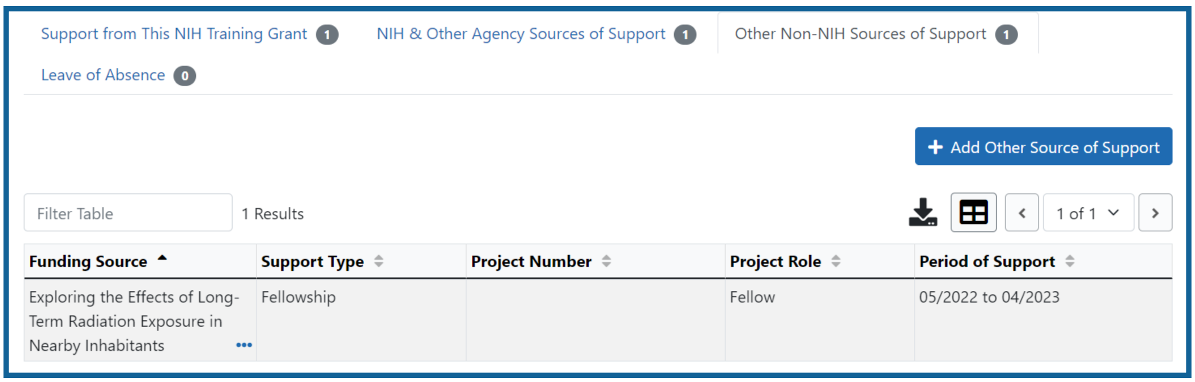


2. Complete the required **Activity Code** and **IC Code** fields.
3. Complete other fields as appropriate.
4. Click the **Search Funding Sources** button. A list of matches is displayed.
5. Click the **Select this Funding Source** button.
6. Select the trainee's role from the **Role during funding** 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 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.



To add a source of support:

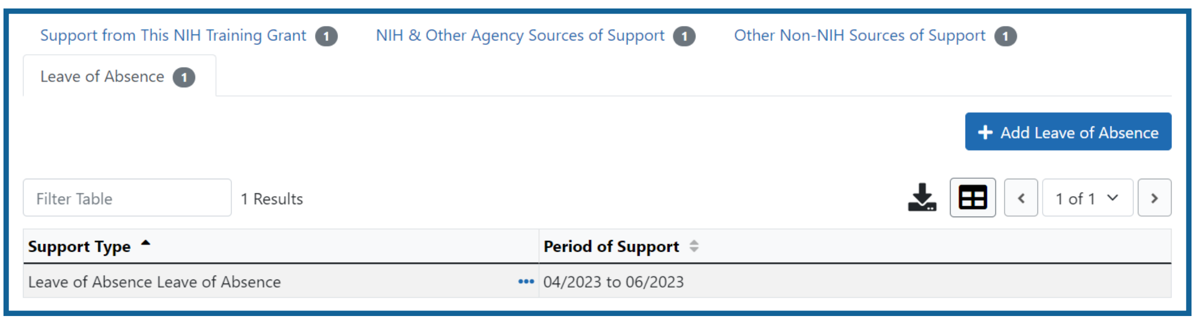
1. Click the **Add Other Source of Support** button to open the *Add Other Source of Support* pop-up.
   a. To search:
      - Enter search criteria in the fields and click the **Search Funding Sources** button.
      - Click the **Select this Funding Source** button for the correct project. The Enter 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.



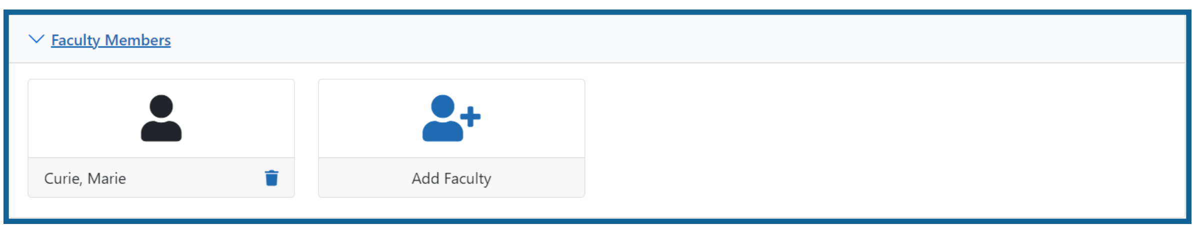
To add a Leave of Absence:

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

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.



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.

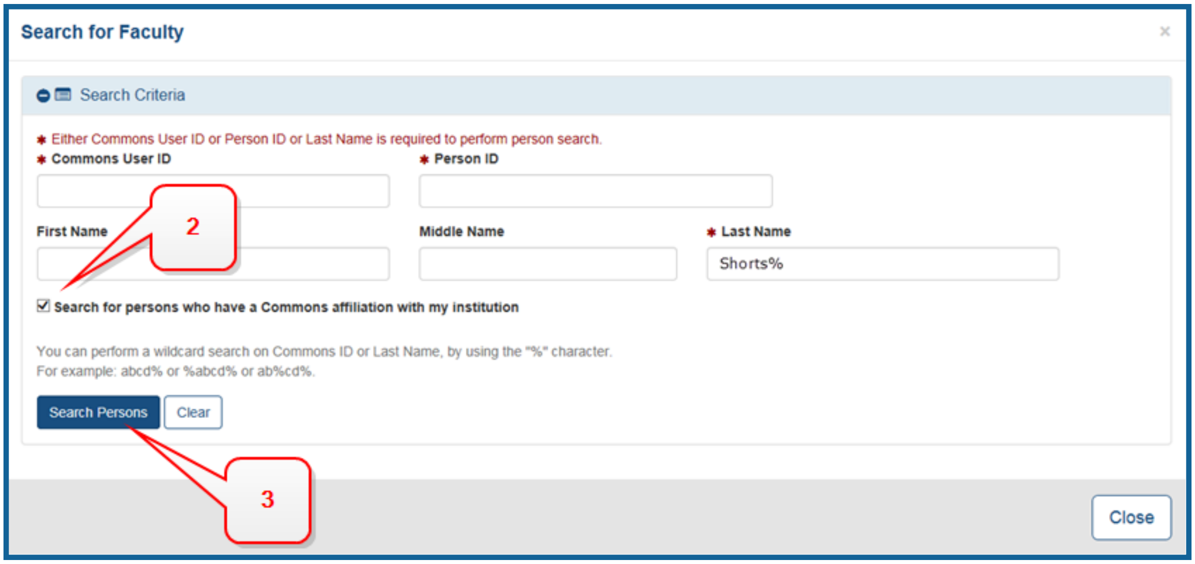


Figure 38: Search for Faculty

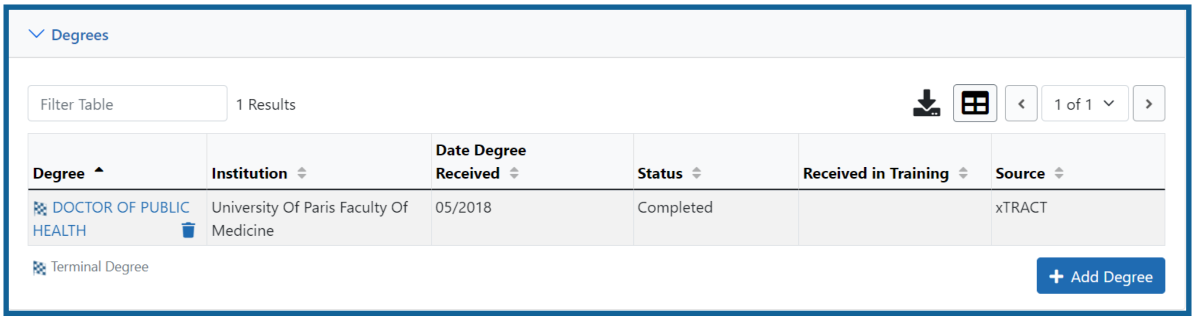
3. Select the **Search Persons** button. All matching records display in the **Person(s)** table.
4. In the Persons table, select the **Add to RTD** check box for the person to add to the RTD.
5. Click the **Add Person(s)** button.
6. (Optional) Repeat the steps above to search for and add other faculty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



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:

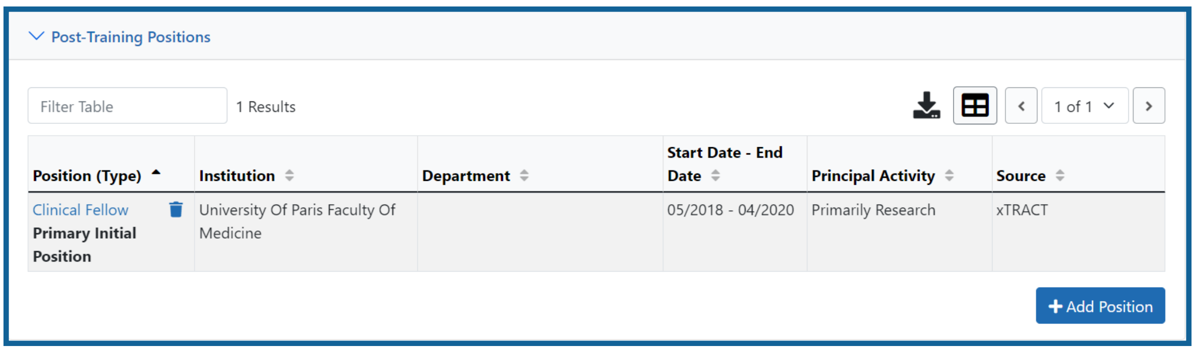
1. Select the **Add Degree** button.
2. Update the fields in the *Create a New Degree* pop-up:
   - **Degree**: Select from the list
   - **Other Degree Text**: Enter the name of the degree if an *OTH* type of degree was selected.
   - **Degree Date**: Enter in MM/YYYY format
   - **Terminal Degree**: 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 **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.



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.

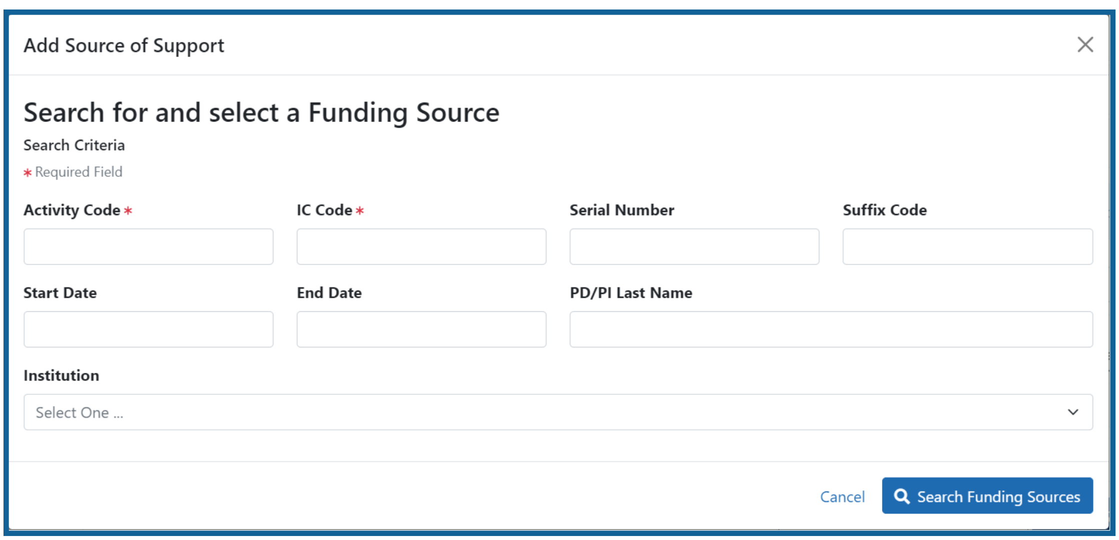
Add Other Source of Support button: Add sources of grant support received from non-NIH/Agency sources.

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 individual had the following role: PD/PI, Staff Scientist, Faculty, or Co-Investigator.*"

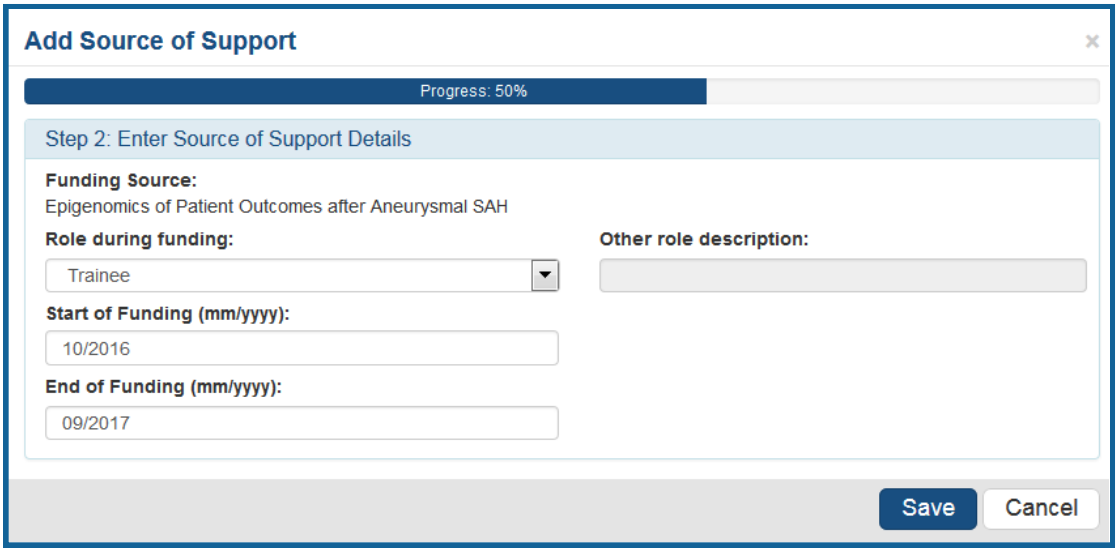
To add an NIH or Agency grant as a support source:

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



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.

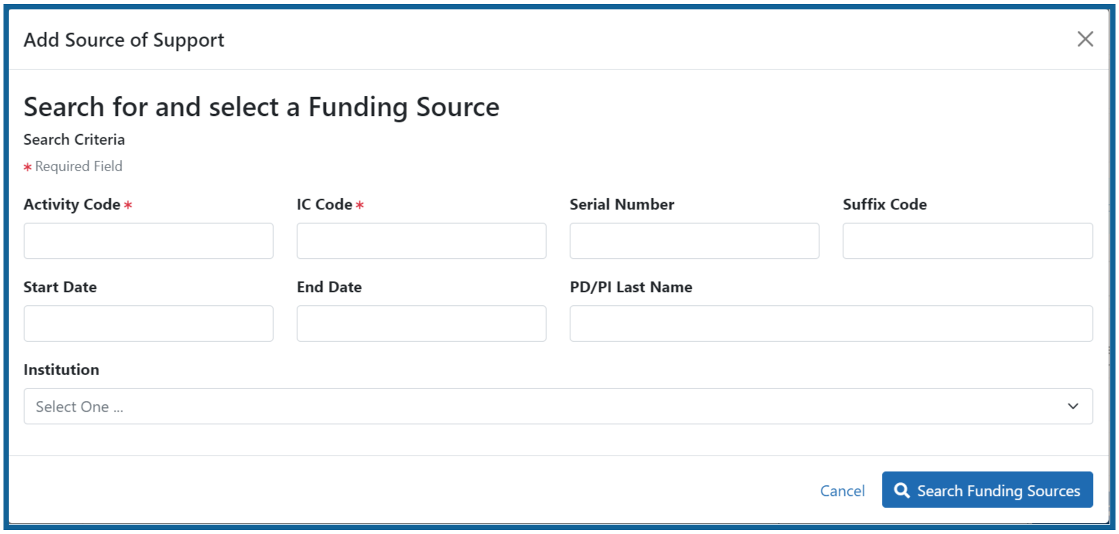


7. Click **Save and Exit**. Alternatively, if you want to add another funding source, click **Save and Add Another Source of Support** to be returned to the funding search popup.

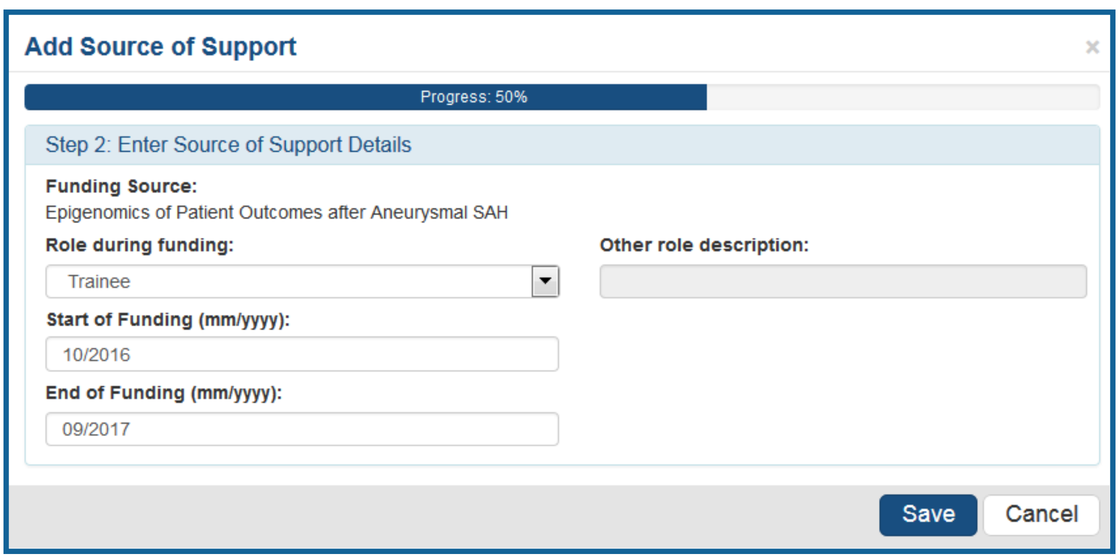
To add NIH or Agency support by indicating a generic activity code/IC:

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.



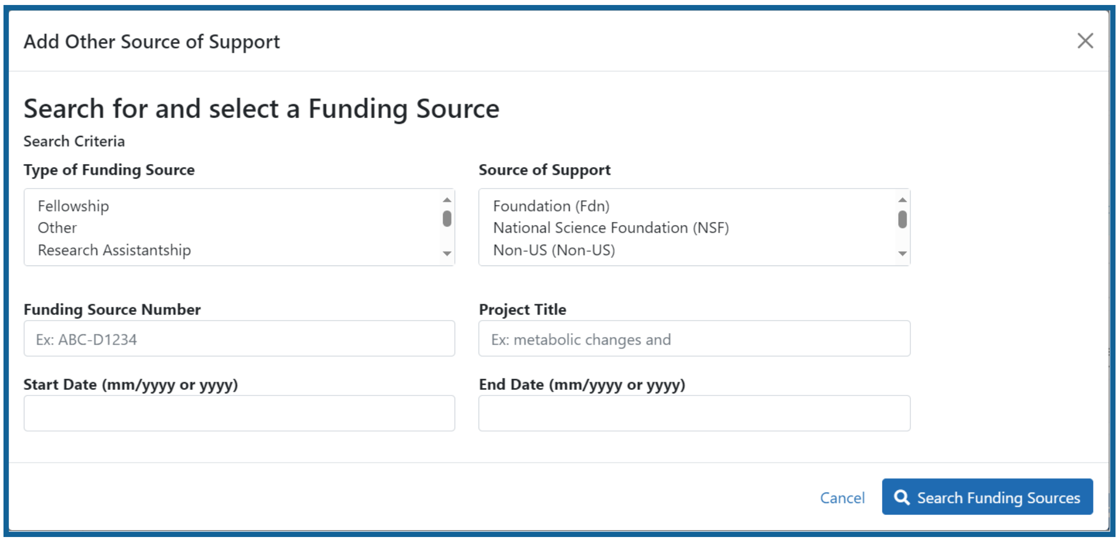
2. In the search criteria, enter an activity code and IC ONLY, and then click the **report activity code and IC directly** link.
3. TIn the search results, click the **Select this Funding Source** button for the funding source you want to add.
4. Select the appropriate option from the **Role during funding** 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.



6. 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:

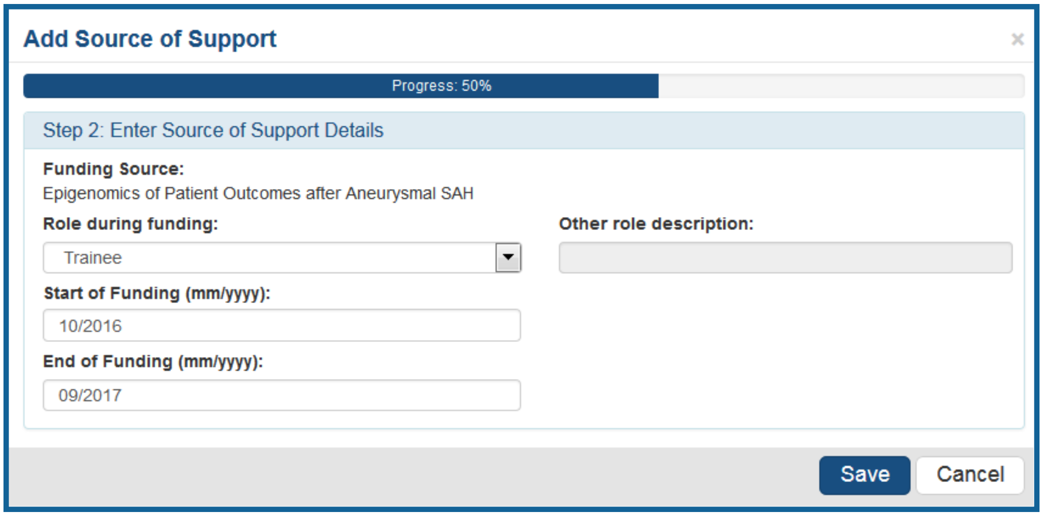
1. In the *Subsequent Grants* pane, click the **Add Other Source of Support** button to open the *Add Other Source of Support* popup.



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.



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 funding search popup.

Program Statistics (RPPR)

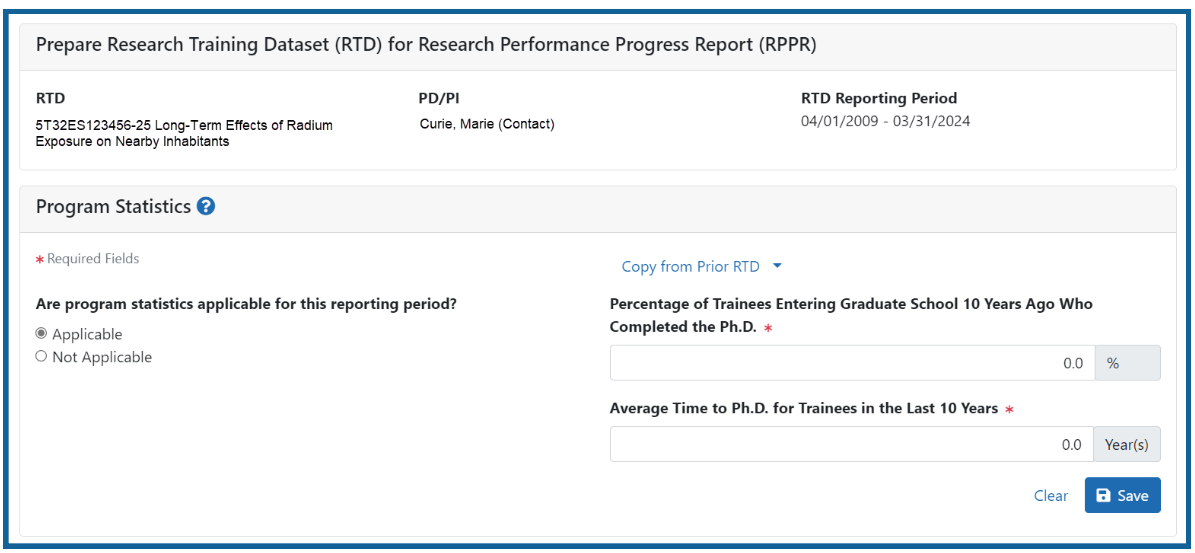


Figure 39: Program Statistics (RPPR)

The **Program Statistics** section is only available for training grants that have Pre-doctorate 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.

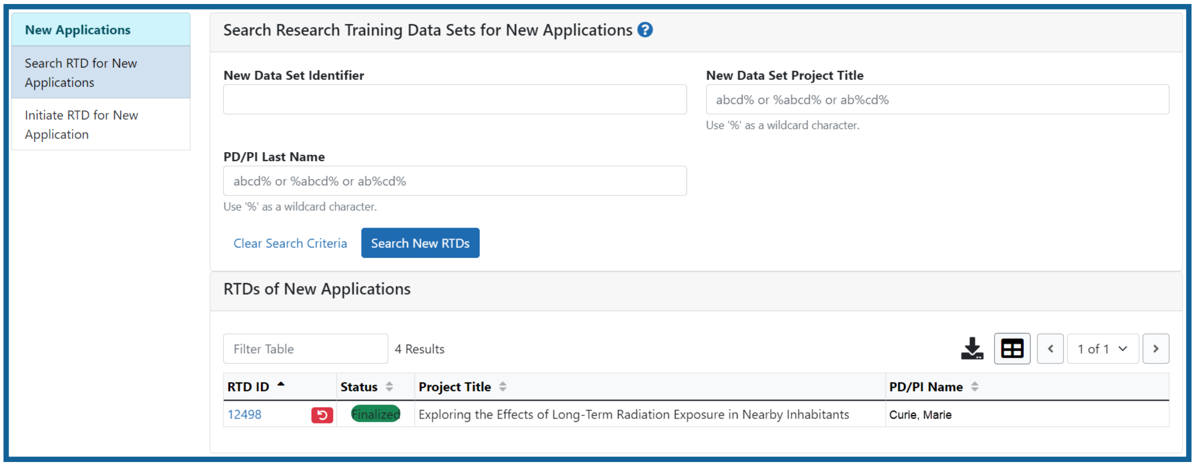
   A confirmation message warns: Are you sure you want to finalized this RTD? Once finalized, the RTD cannot be edited?

   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.



Click the hyperlinked RTD ID to view the PDF.

Click the **Unfinalize 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 Renewal** 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.

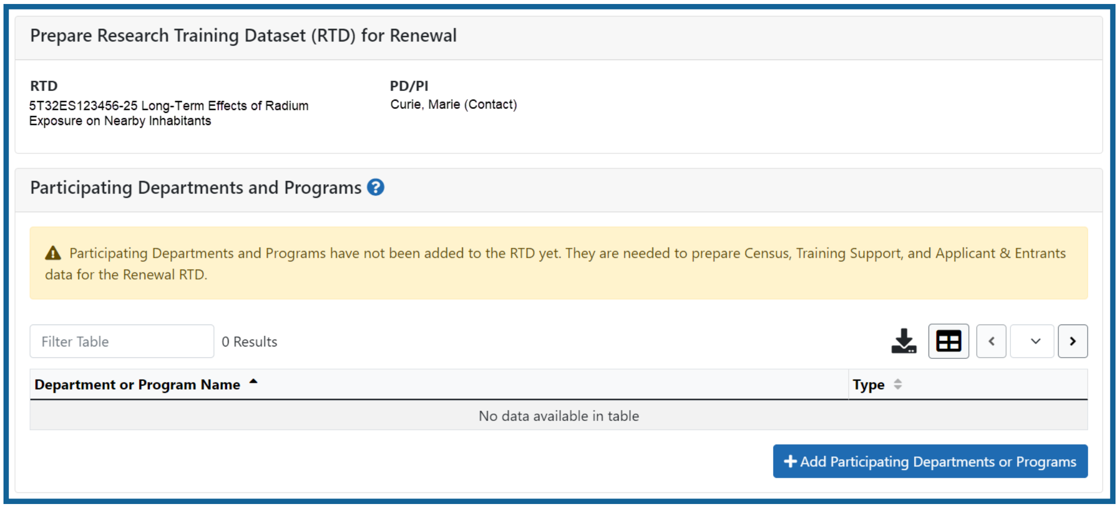


Figure 40: Adding Departments

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.

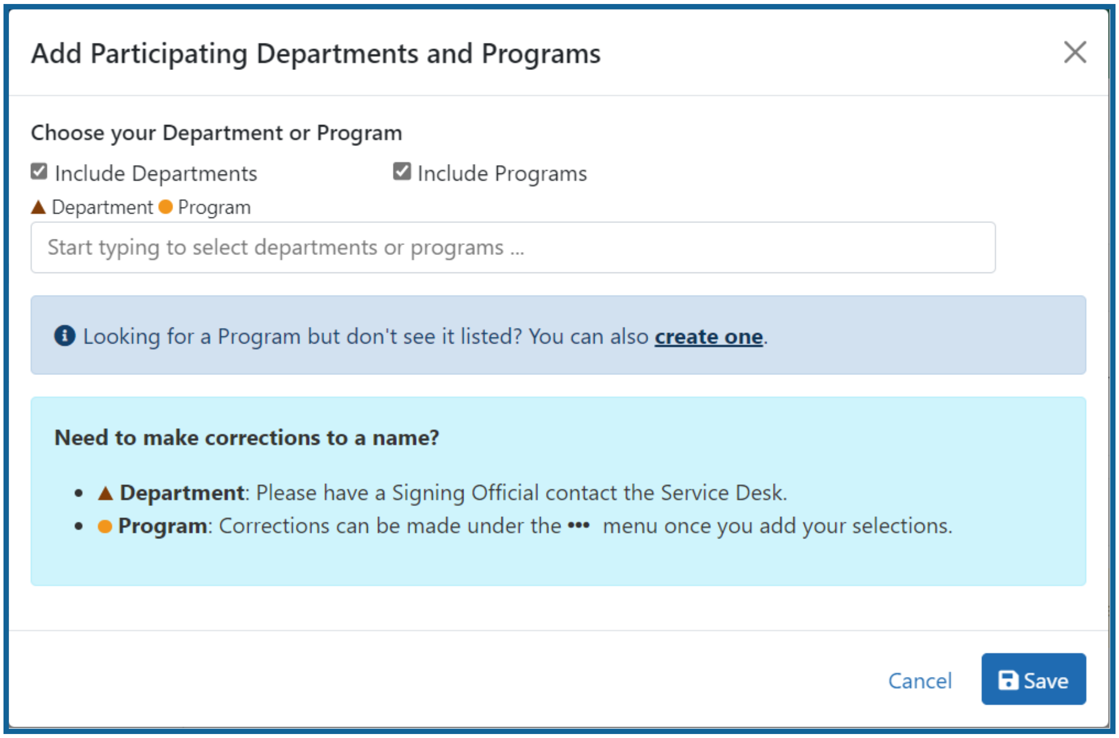


Figure 41: Searching for Departments

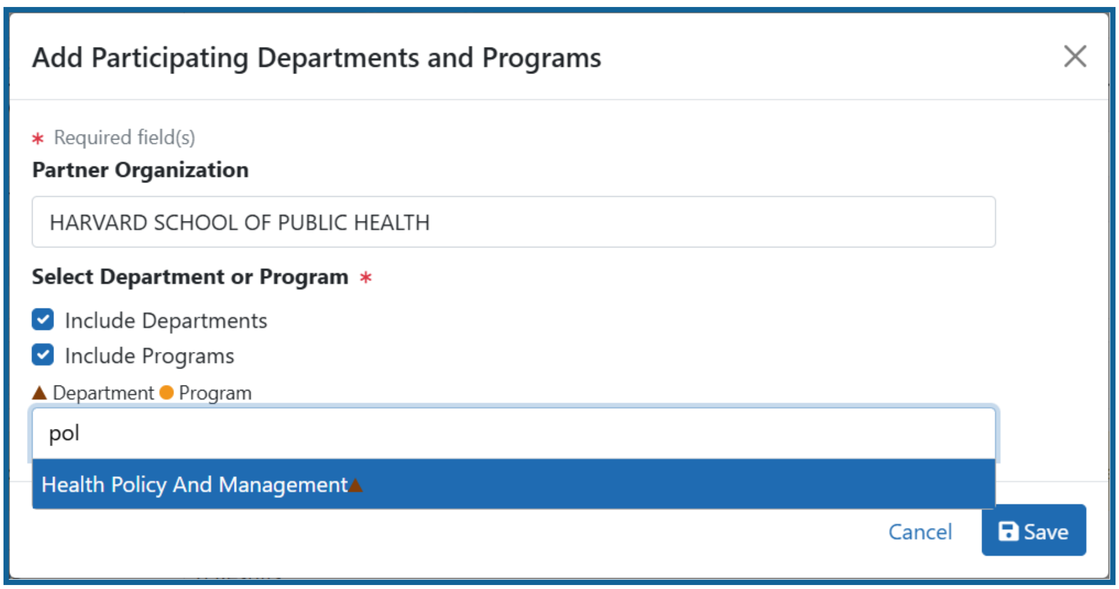


Figure 42: Selecting the Department

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.

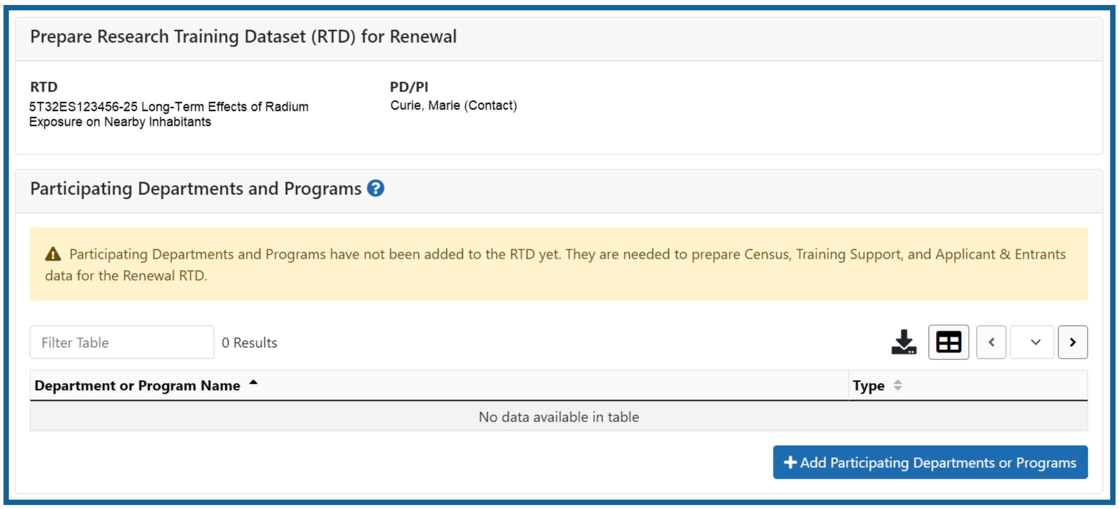


Figure 43: Add Participating Departments or Programs Button

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**.

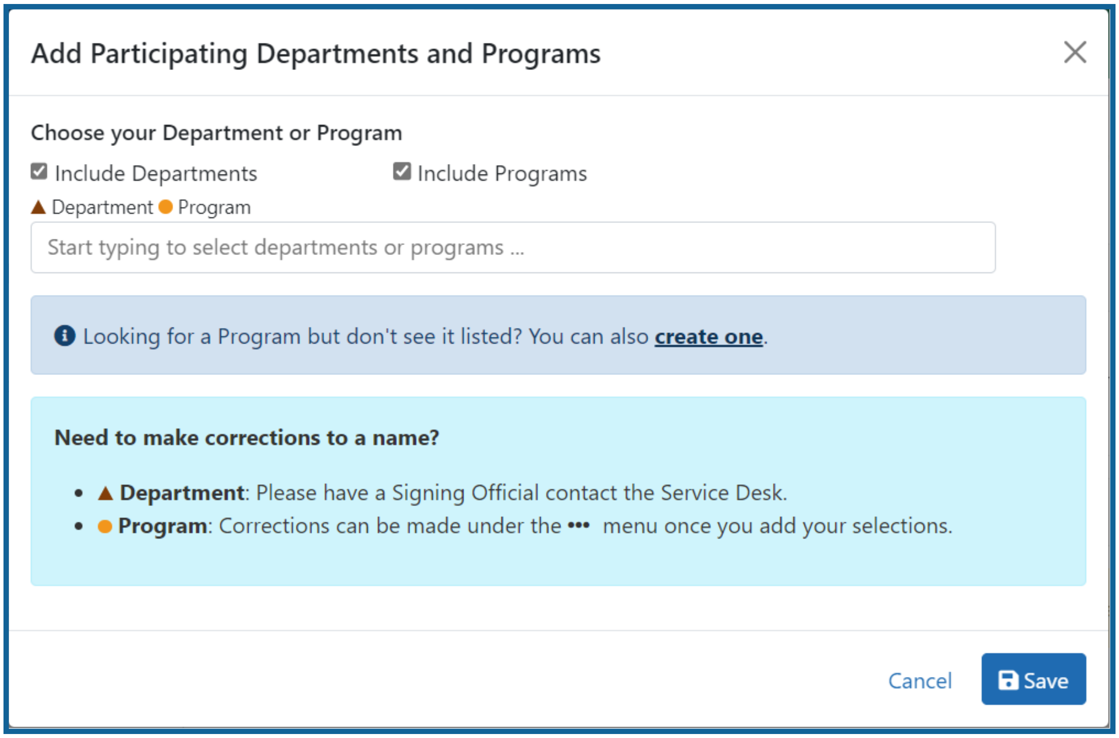


Figure 44: Searching for Programs Displaying Create One Hyperlink

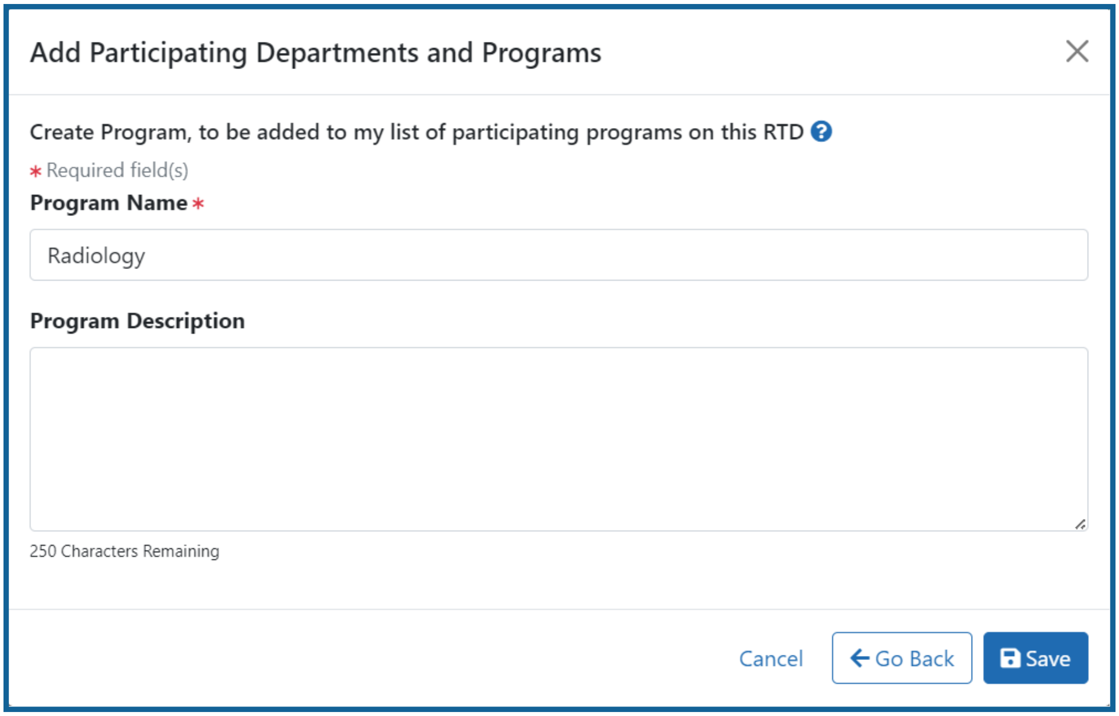


Figure 45: Searching for Programs

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.

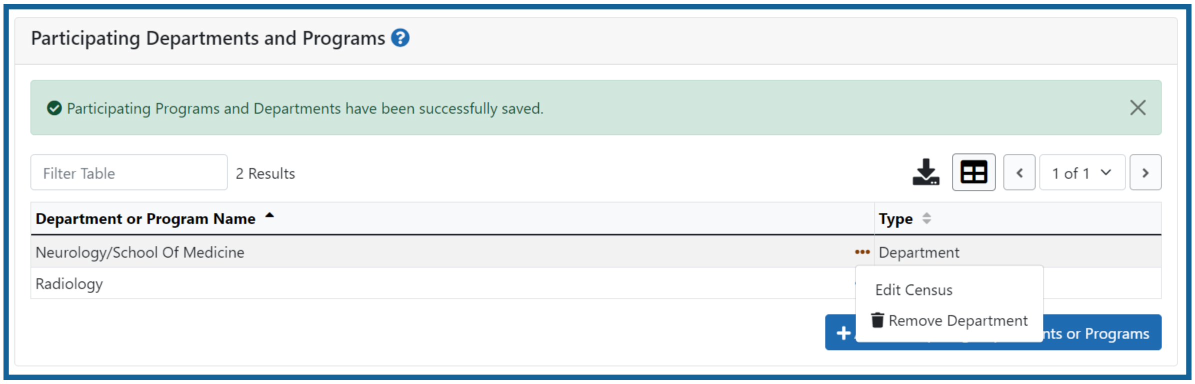


Figure 46: Edit Button for Programs and Departments

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)

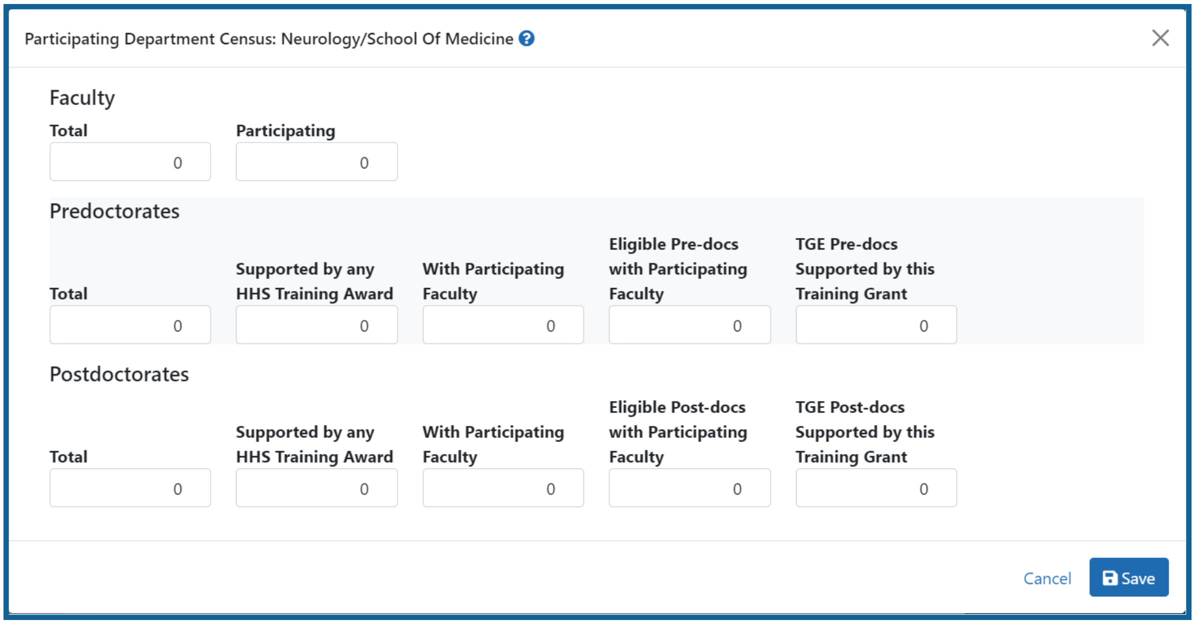
Postdoctorates

- 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



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.

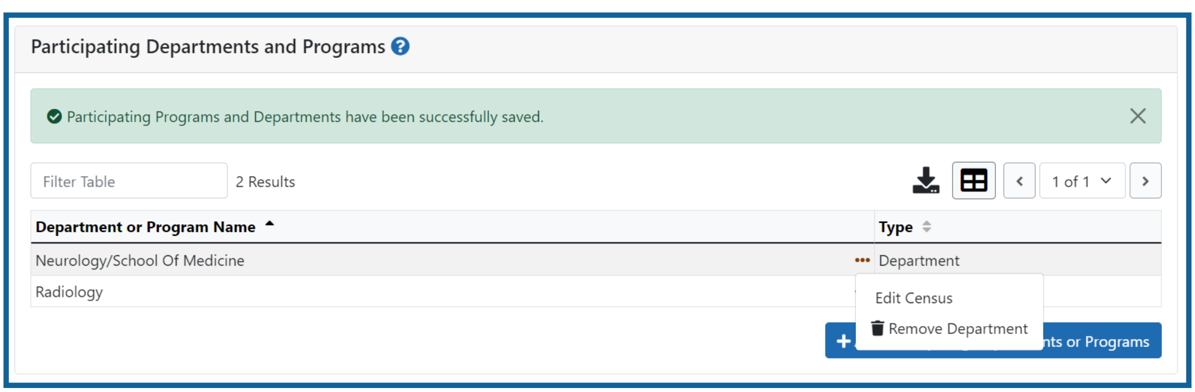


Figure 47: Edit Button for Programs and Departments

Update the Census information as necessary.

Faculty

- Total
- Participating

Predoctorates

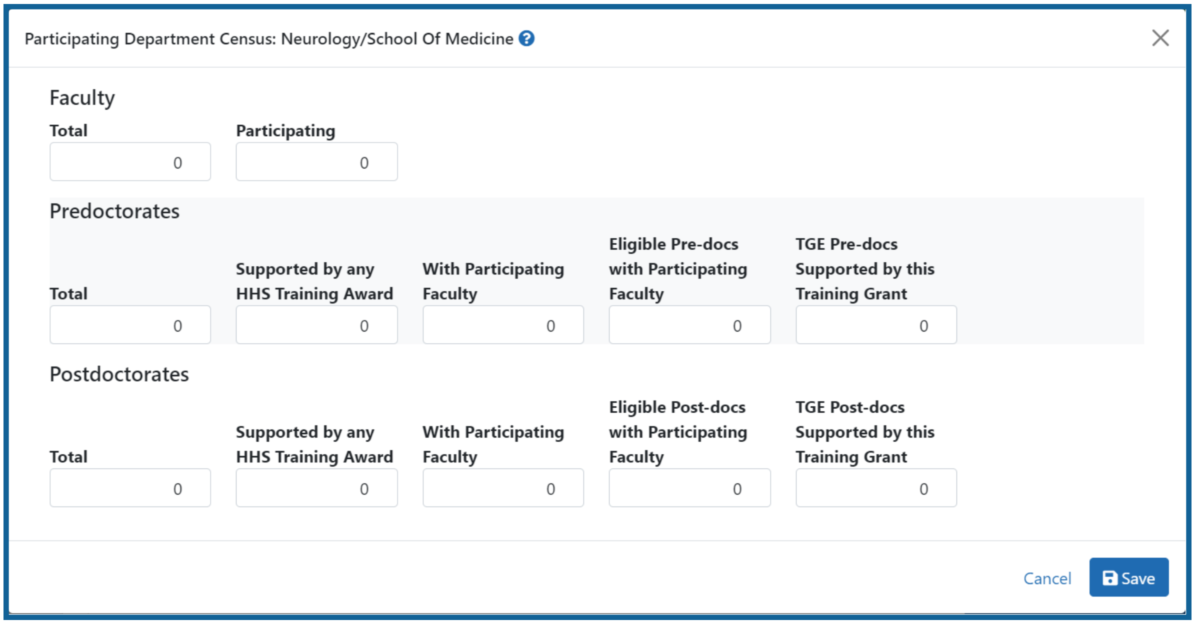
- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

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



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.

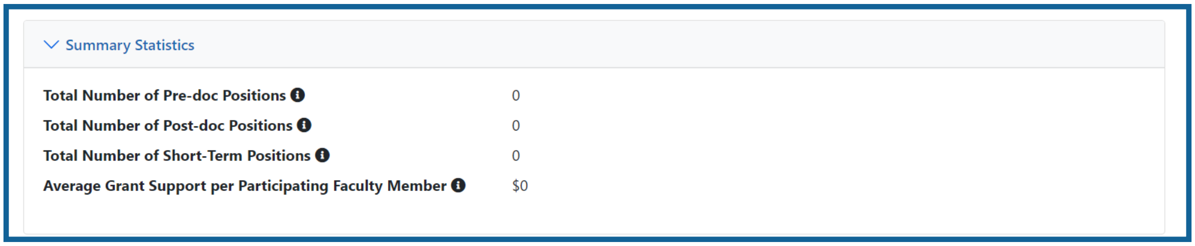


Figure 48: Training Support & Summary

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.

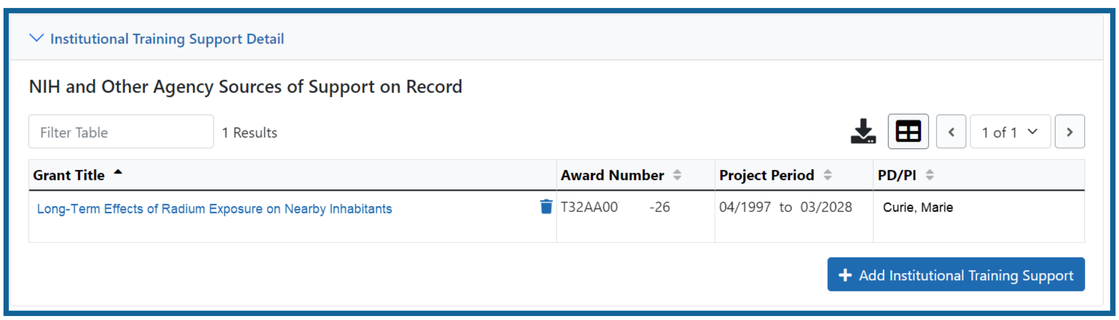


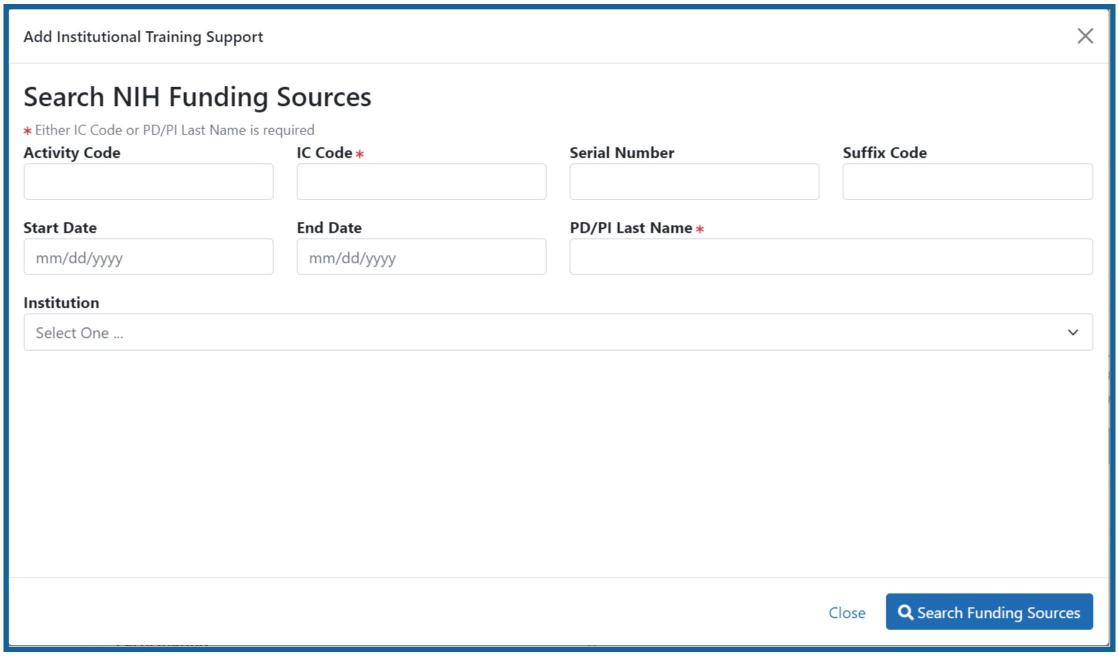
Figure 49: Add Institutional Training Support Button

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.



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.

Predoc

The following read-only information is displayed. This data is maintained on the **Participating 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 **Participating 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.

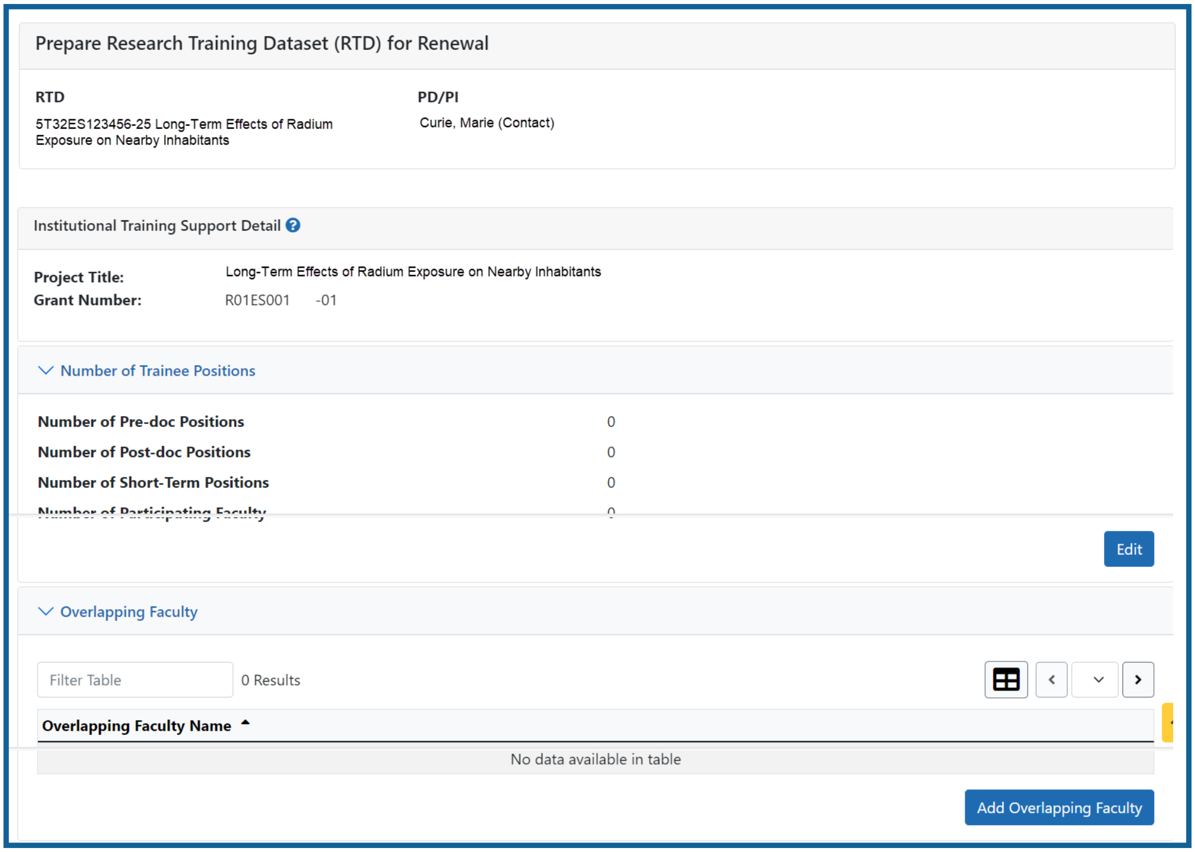


Figure 51: Institutional Training Support Detail

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.

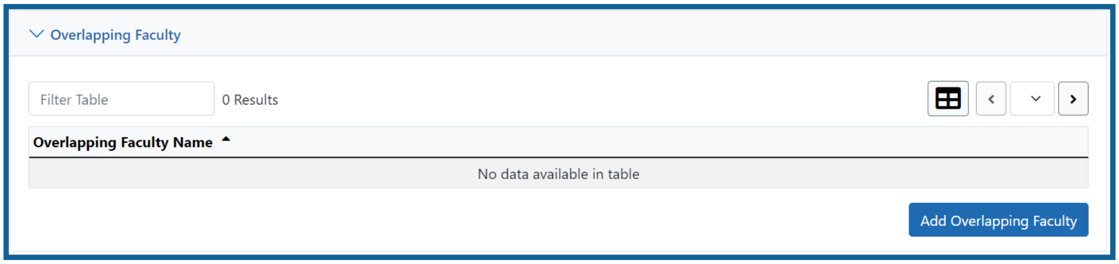


Figure 52: Add Overlapping Faculty Button

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.

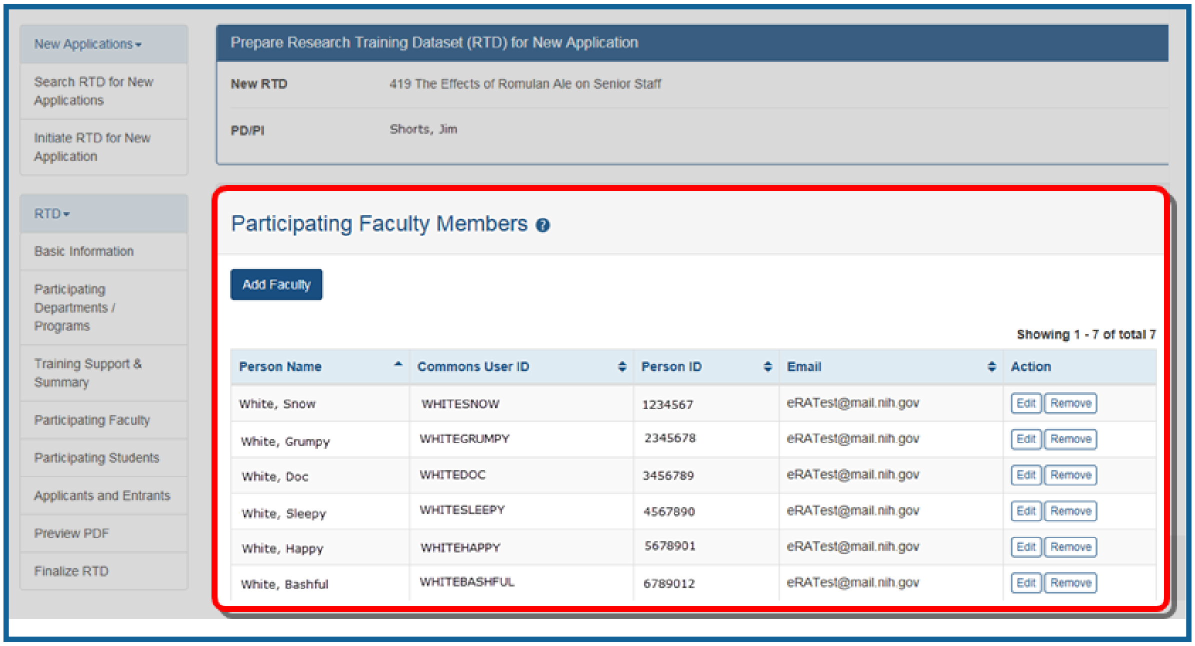


Figure 53: Participating Faculty Members

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.

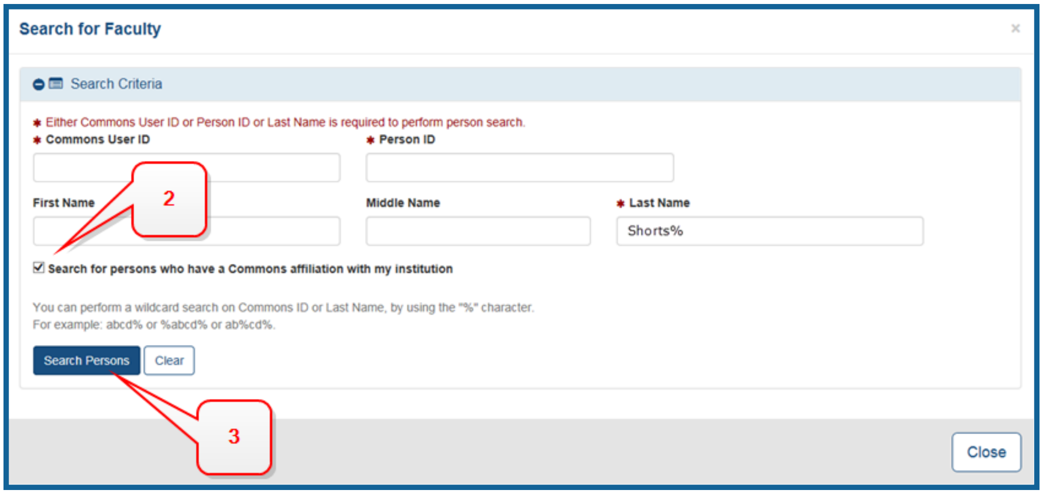
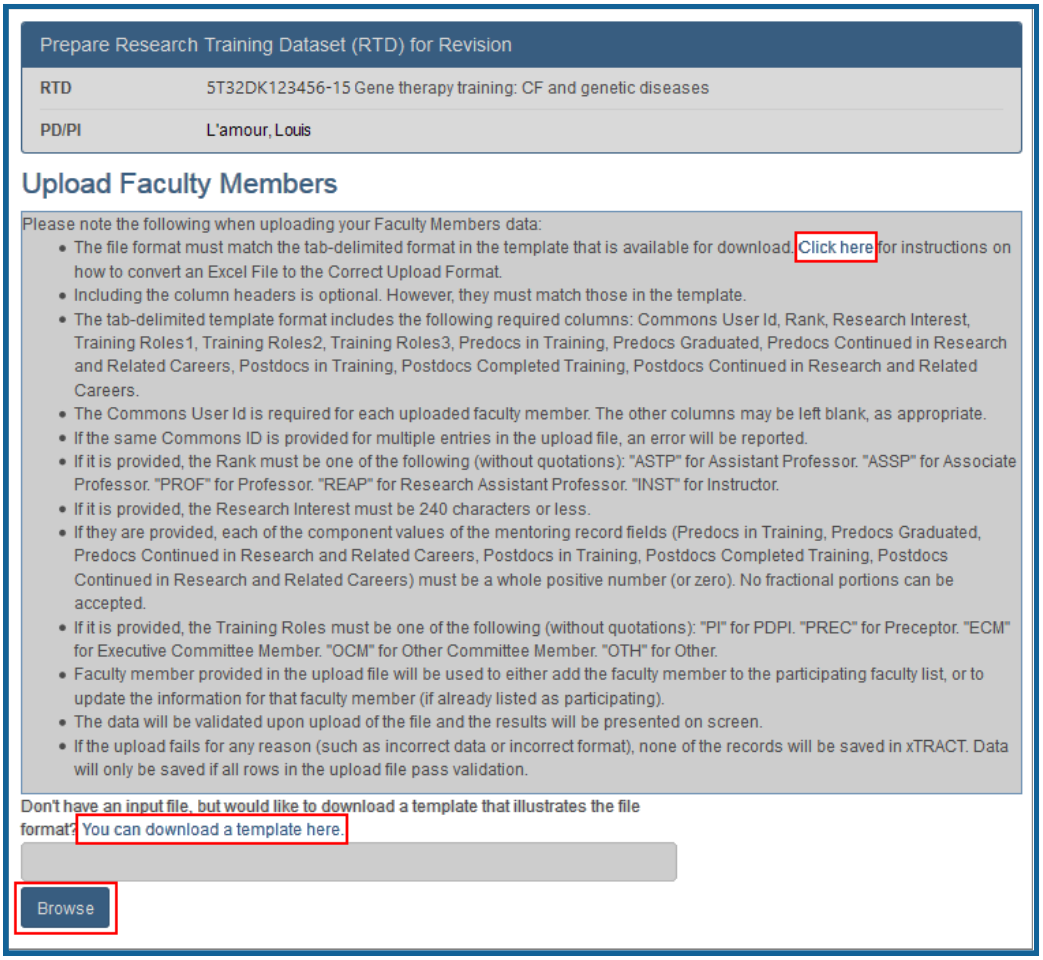


Figure 54: Search for Faculty

3. 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.

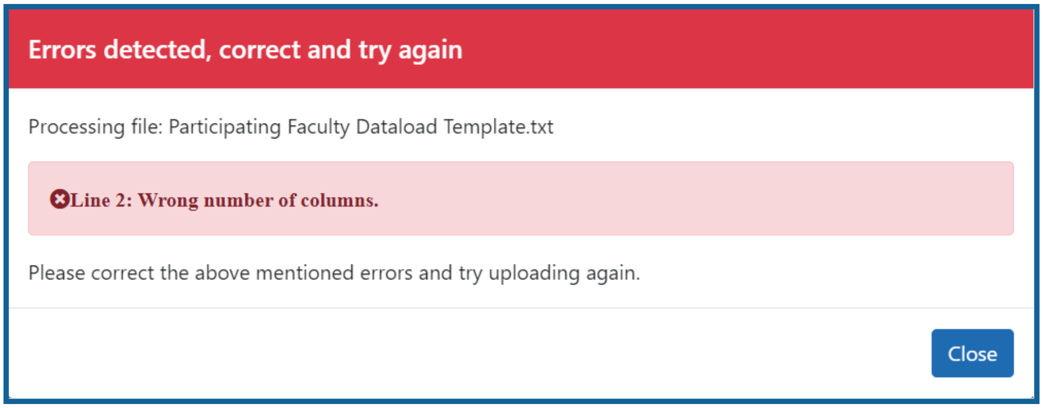
How Do I Add Faculty Via a Bulk Upload?

- Select the **Upload Participating Faculty** button below the table.
  1. 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.

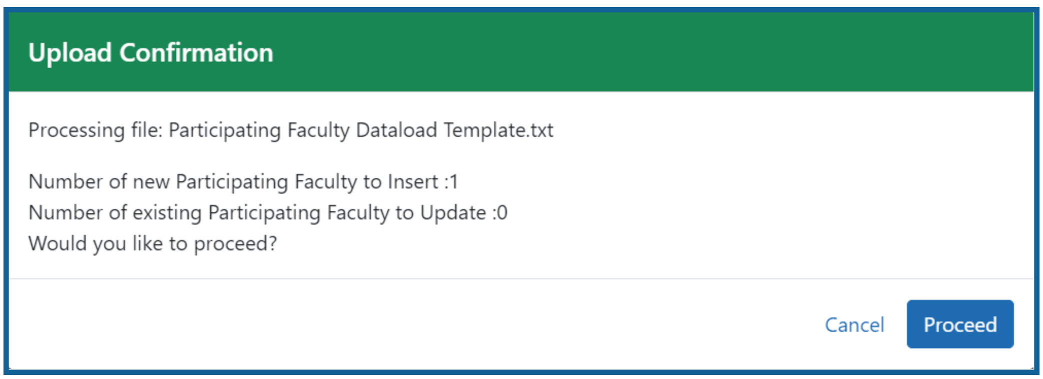


2. Once the upload file has been prepared, use the **browse** link to select and upload the file.
3. If there are any errors in the upload file, a message will appear above the file-name with a link to details of the errors. These errors will need to be cor-

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.

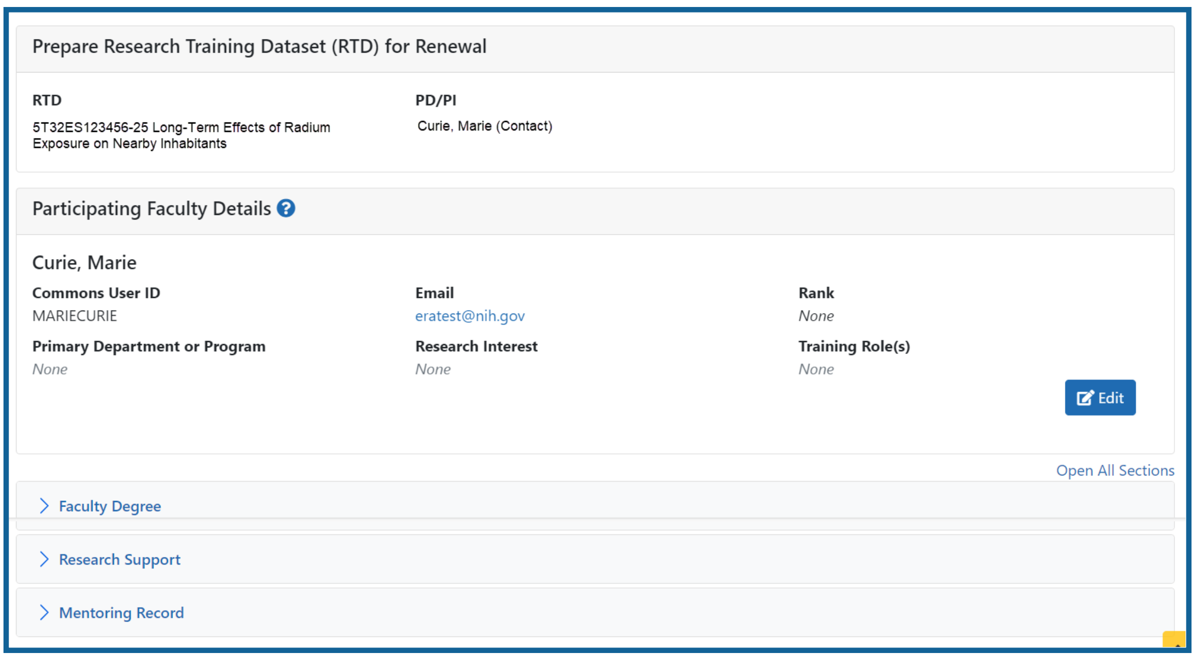


Figure 55: Participating Faculty Details

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

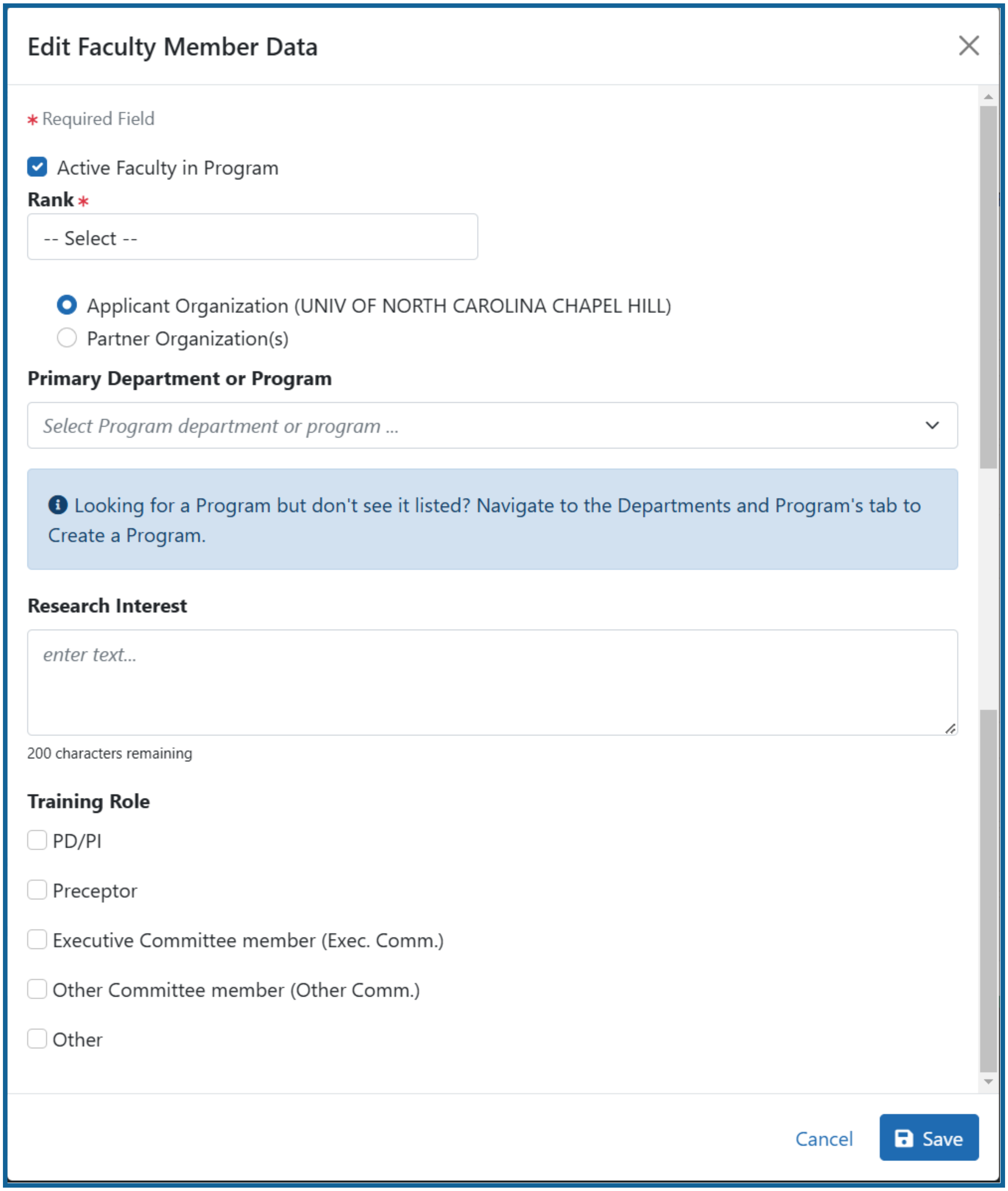
Participating Faculty Details

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:



2. 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.

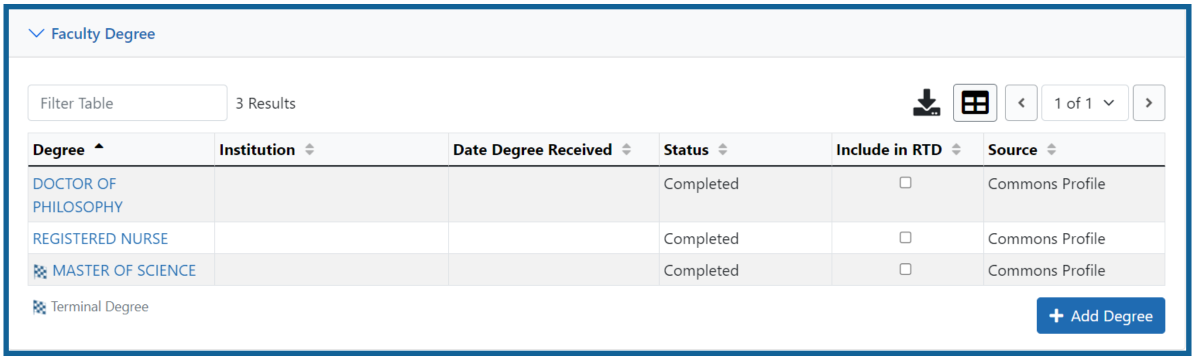
   This lets you provide more accurate position information about grant faculty who hold non-academic positions, such as in government or the private sector. The **Other Rank** field is enabled only if you select **Other** in the **Rank** drop-down list.
4. Select the appropriate radio button for the faculty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



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.
2. 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.

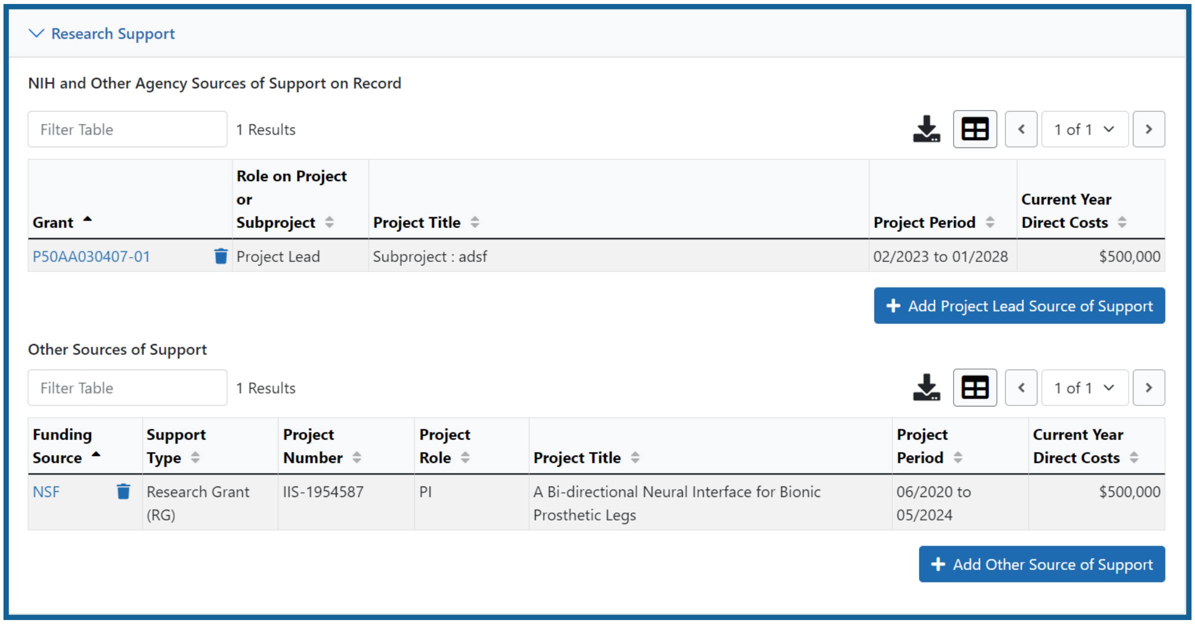
Delete a Degree

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 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.

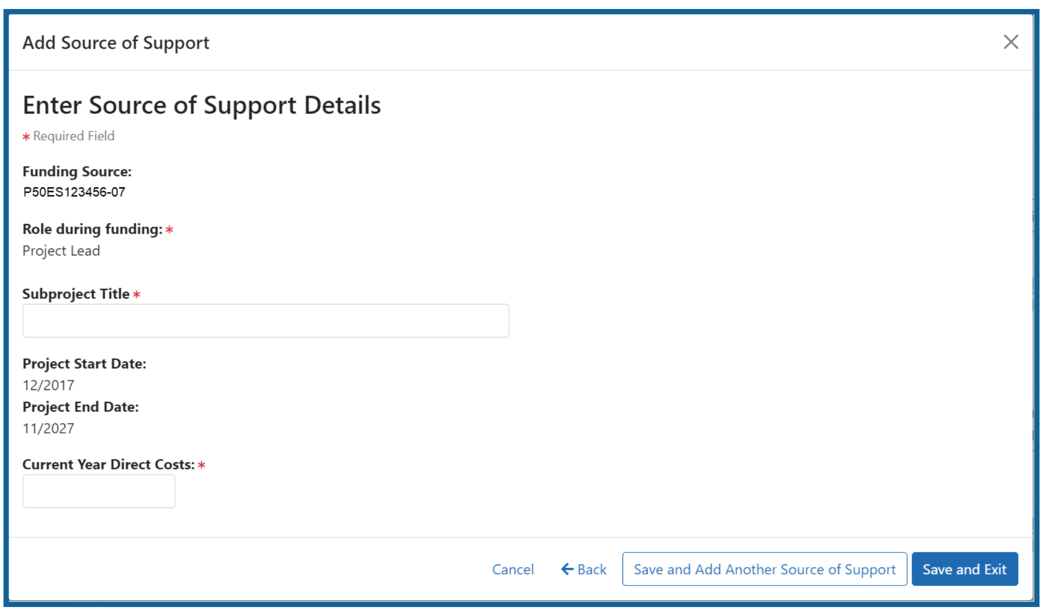
Use the **Add Project Lead Source of Support** button to search for other NIH or Agency grants that contain sources of support. If the faculty member is reported on an RPPR, then those grants will be displayed as suggested sources of funding, but you can also find and choose grants outside of that suggested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

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

1. 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.

3. Enter search criteria in the *Add Source of Support* window and click the **Search** button.
4. In the search results, click the **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.



6. 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

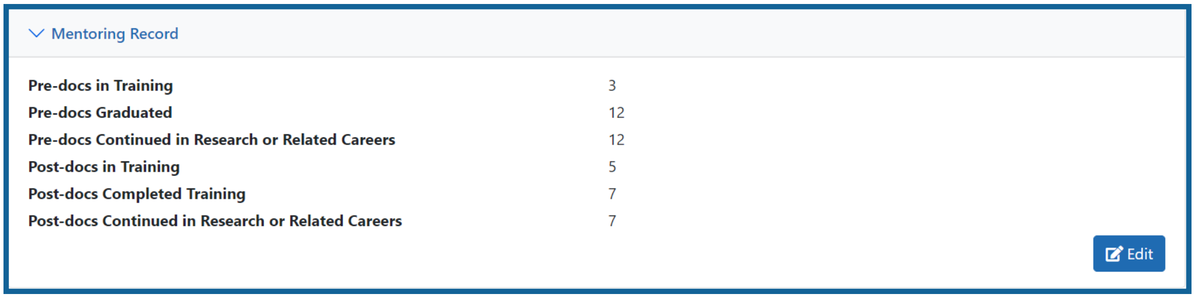
Includes Funding Source, Support Type, Project Number, Project Role, Project Title, Project Period, and Current Year Direct Costs.

To add additional support:

1. 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 **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.
5. 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.



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.

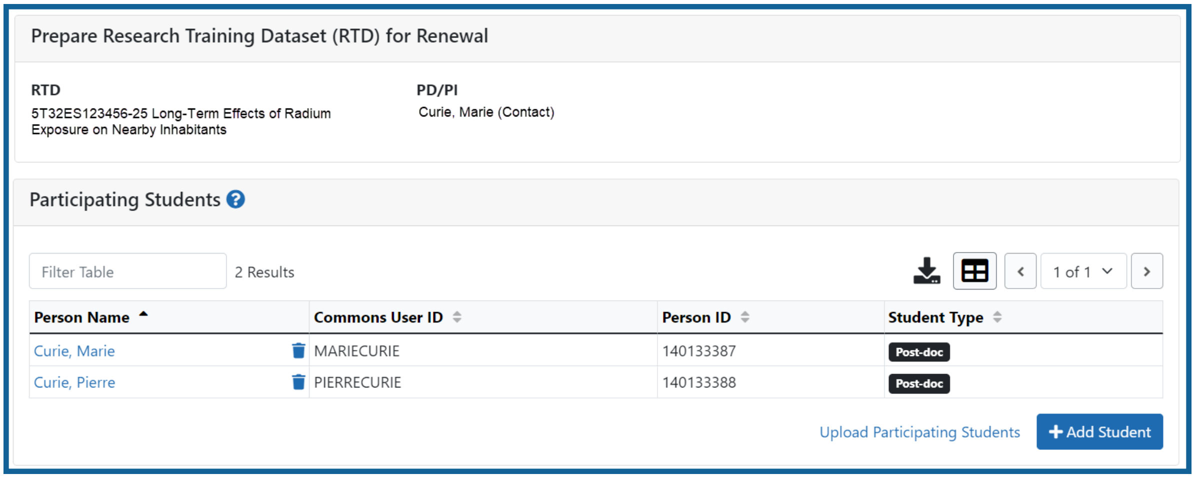


Figure 56: Students

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

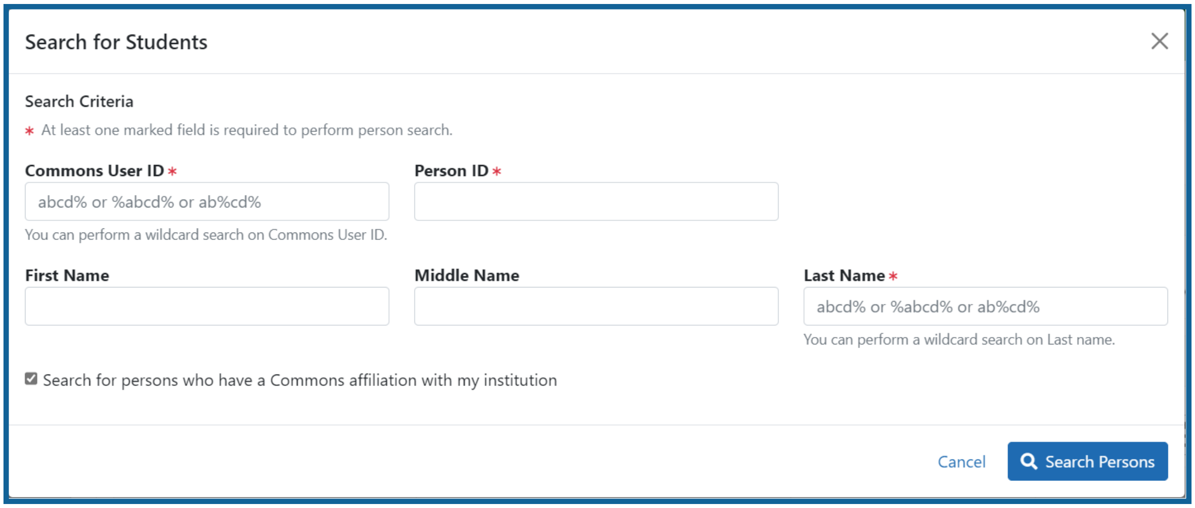
- **Student Name**
- **Commons User ID** (if available)
- **Person ID**
- **Student Type**: Pre-doc or Post-doc
- **Actions**
  - The **Edit** link opens the *Student Detail* for the selected trainee. Refer to the topic titled Refer to *Student Detail for a Renewal (Renewal)* on page 135.
  - The **Remove**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



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.

2. 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.

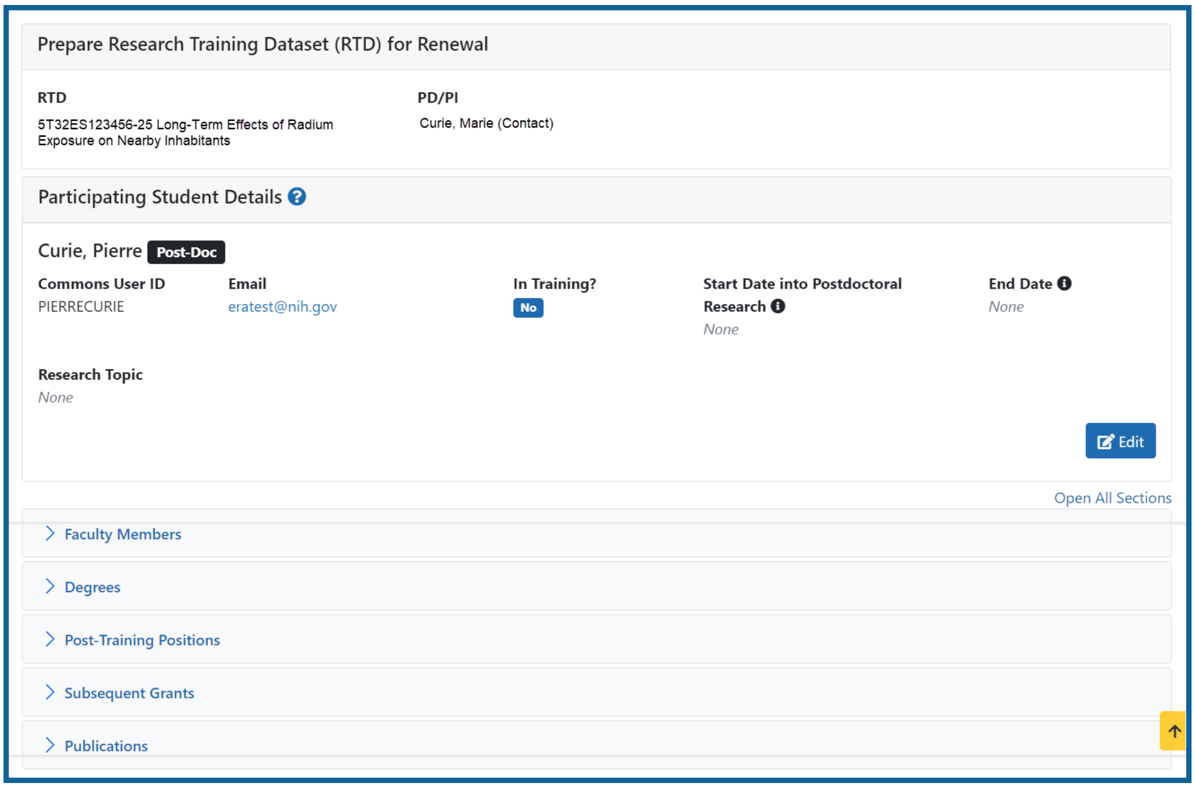
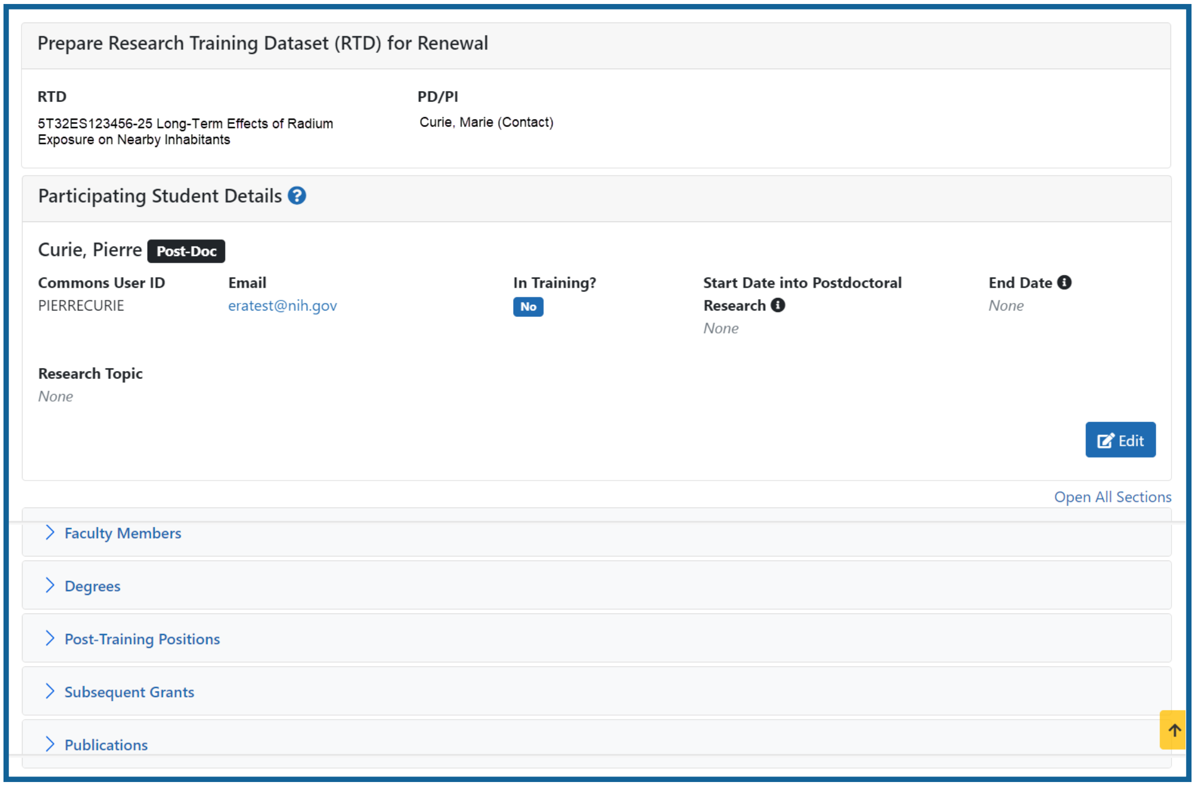


Figure 57: Student Detail (Renewal)

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.



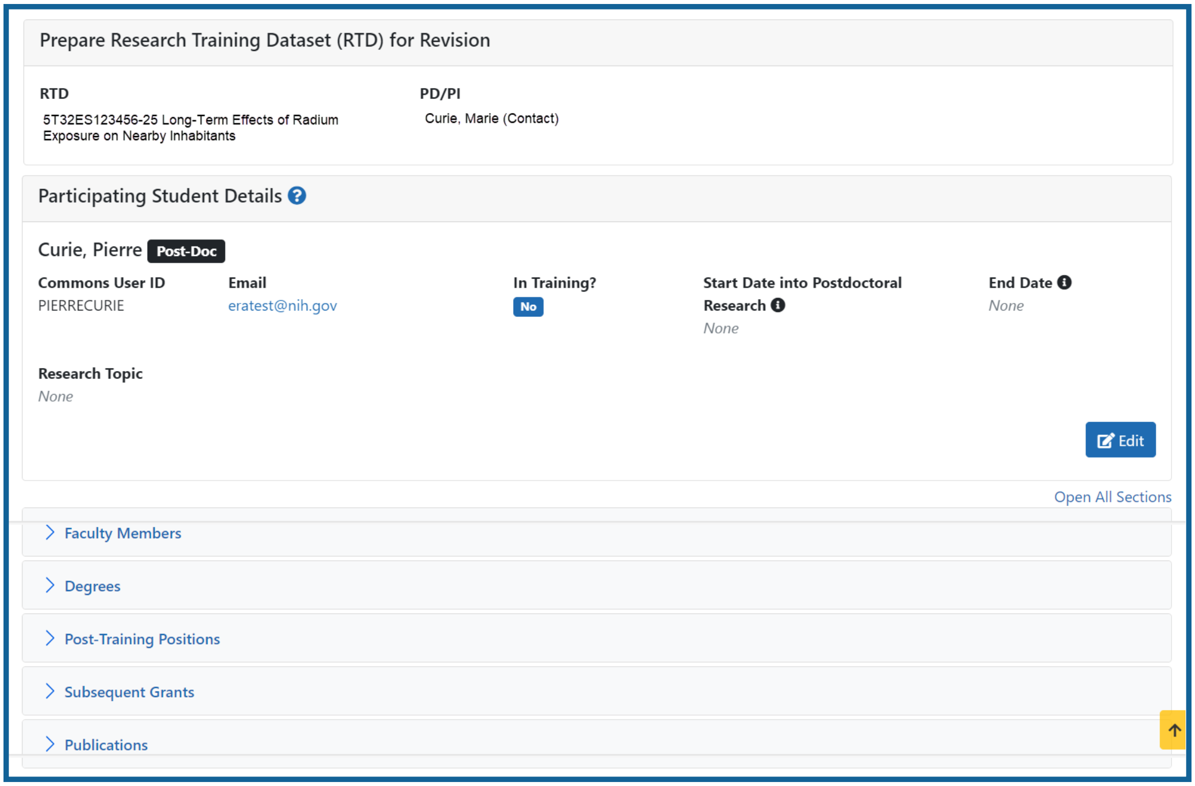


Figure 58: Participating Student Details

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

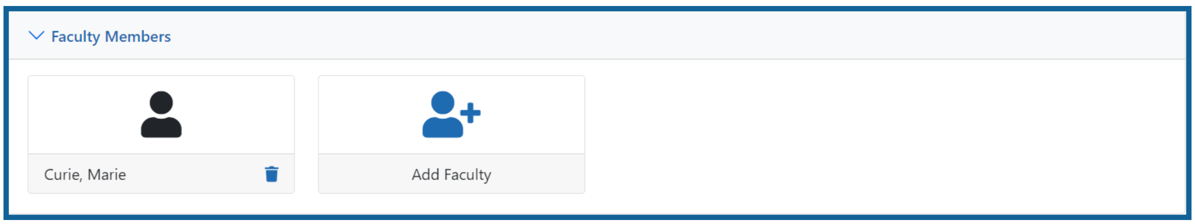
Use the **Edit** button to open the fields in a pop-up for editing.

- 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.



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.

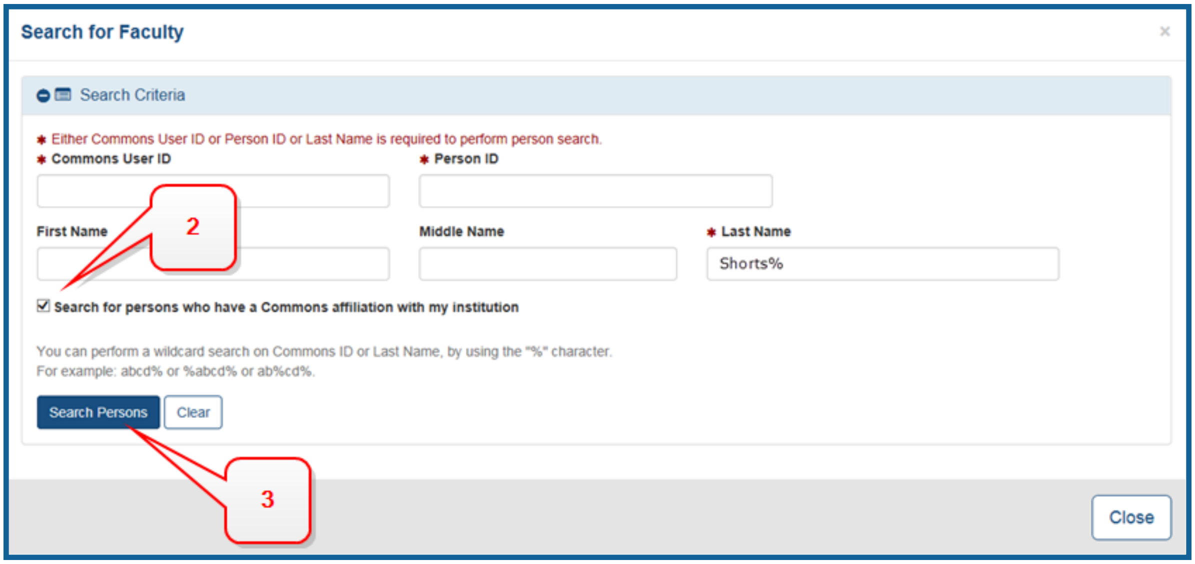


Figure 59: Search Faculty Member

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.

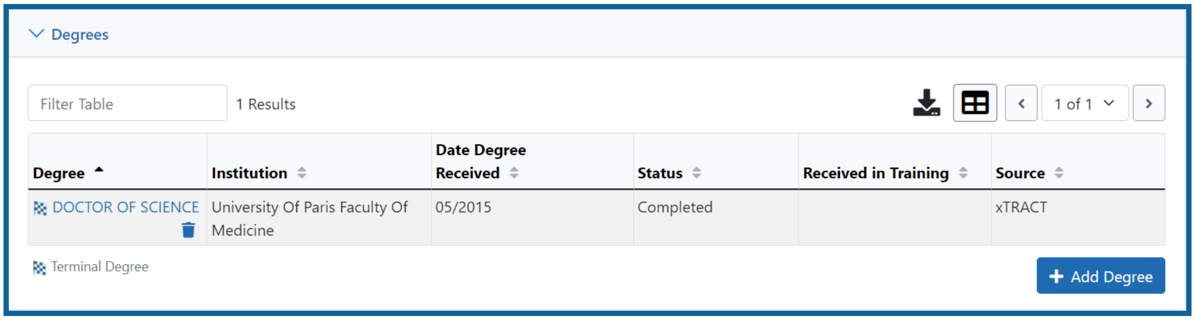
7. Search for and add other faculty as necessary, repeating the steps above.

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.



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).

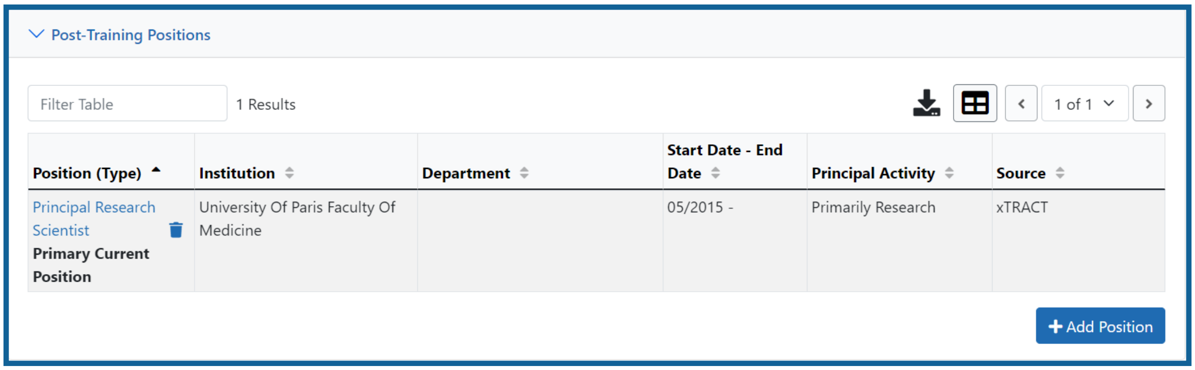
To add a degree:

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 **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.


Post-Training Positions

Filter Table 1 Results 1 of 1

Position (Type)	Institution	Department	Start Date - End Date	Principal Activity	Source
Principal Research Scientist **Primary Current Position**	University Of Paris Faculty Of Medicine		05/2015 -	Primarily Research	xTRACT

+ Add Position

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:

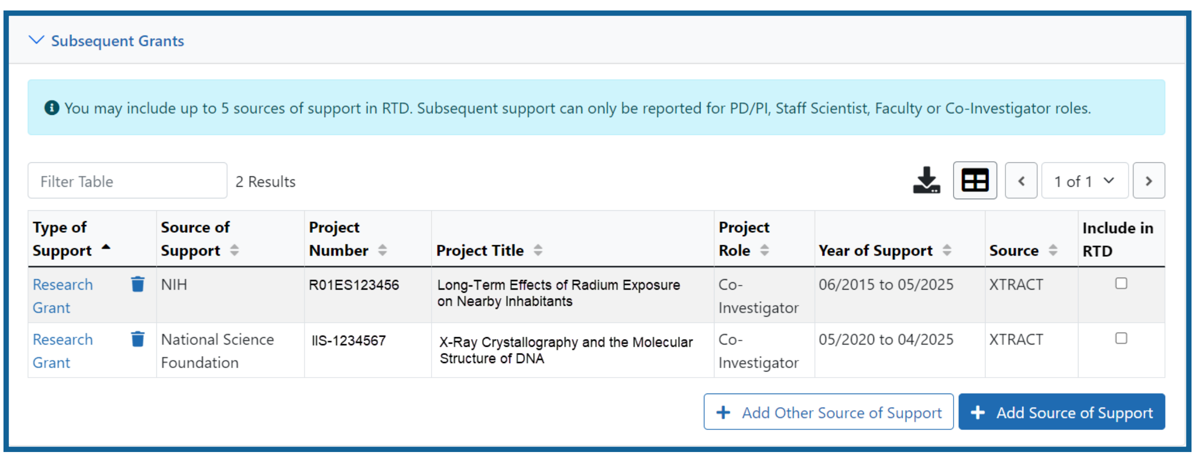
1. Click the **Add Position** button.
2. Provide the following information:
    - **Workforce Sector**: Choose the area of employment: Academia, Government, For-Profit, Nonprofit, Other.
    - **Principal Activity**: Primarily Research, Primarily Teaching, Primarily Clinical, Research-Related, Further 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.



Subsequent Grants

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.

Filter Table 2 Results 1 of 1

Type 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	
Research Grant	National Science Foundation	IIS-1234567	X-Ray Crystallography and the Molecular Structure of DNA	Co-Investigator	05/2020 to 04/2025	XTRACT	

Add Other Source of Support   Add Source of Support

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.

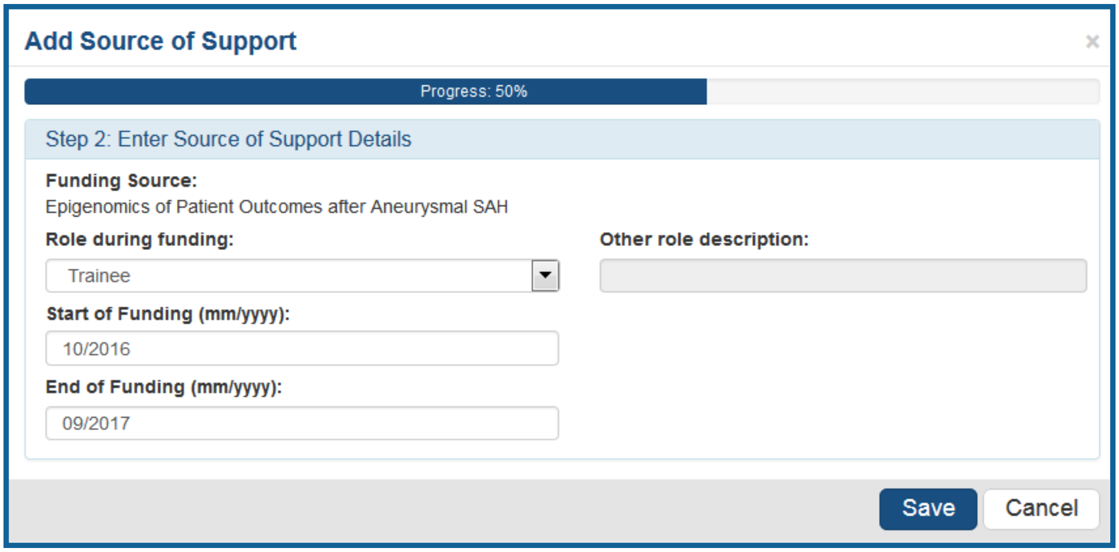
2. To edit a source of support, click the hyperlinked grant name to edit it.
3. To delete a source of support, click the **Remove Source of Support** button.
4. Mark up to five **Include in RTD** checkboxes to specify which sources of support will be included in the RTD, which allows only five sources. 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 individual 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 **Select 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.



5. 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:

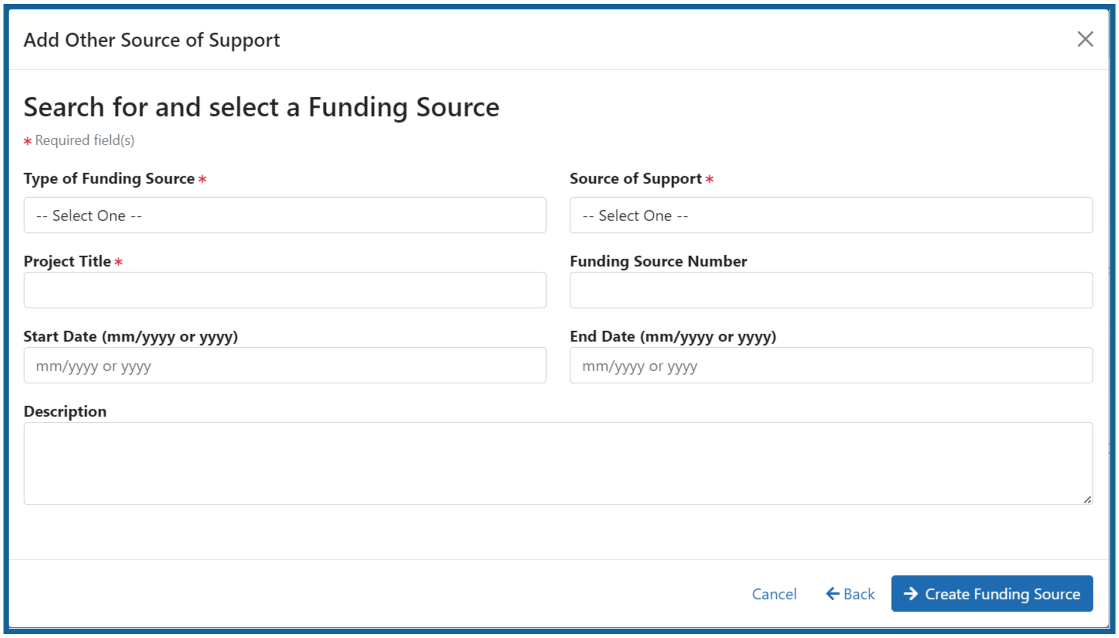
1. In the *Subsequent Grants* pane, click the **Add Other Source of Support** button to open the *Add Other Source of Support* popup.

5. Search for support by entering search criteria.

6. Click the **Search Funding Sources** button.

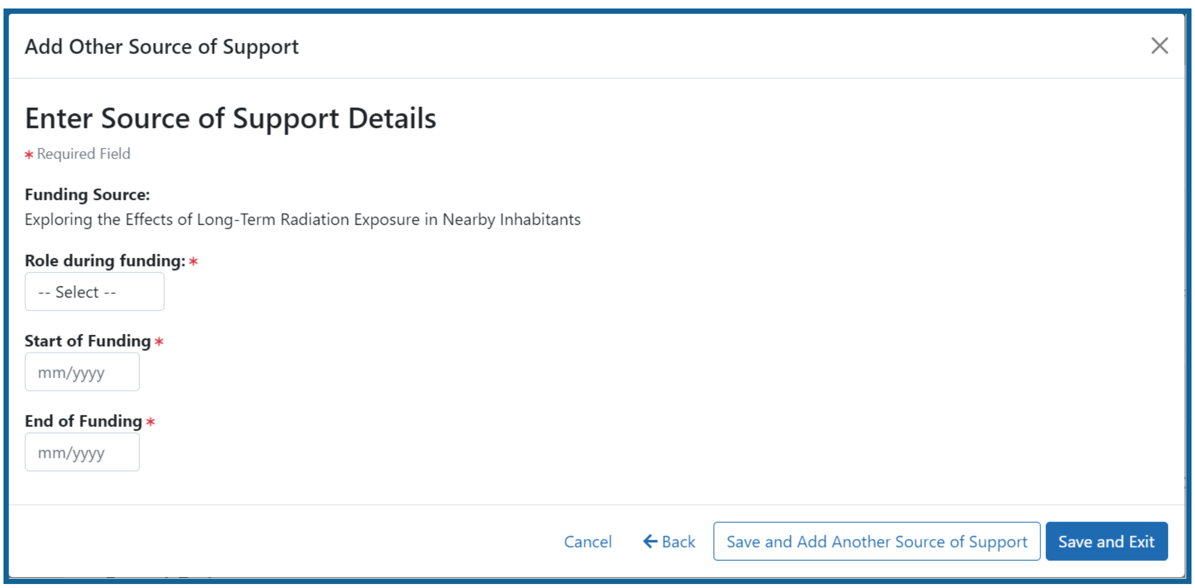
7. In the search results, click the **Select this funding source** button for the funding source you want to add.

8. If the funding source you are looking for does not appear, click the link to **create a new funding source here**.



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.



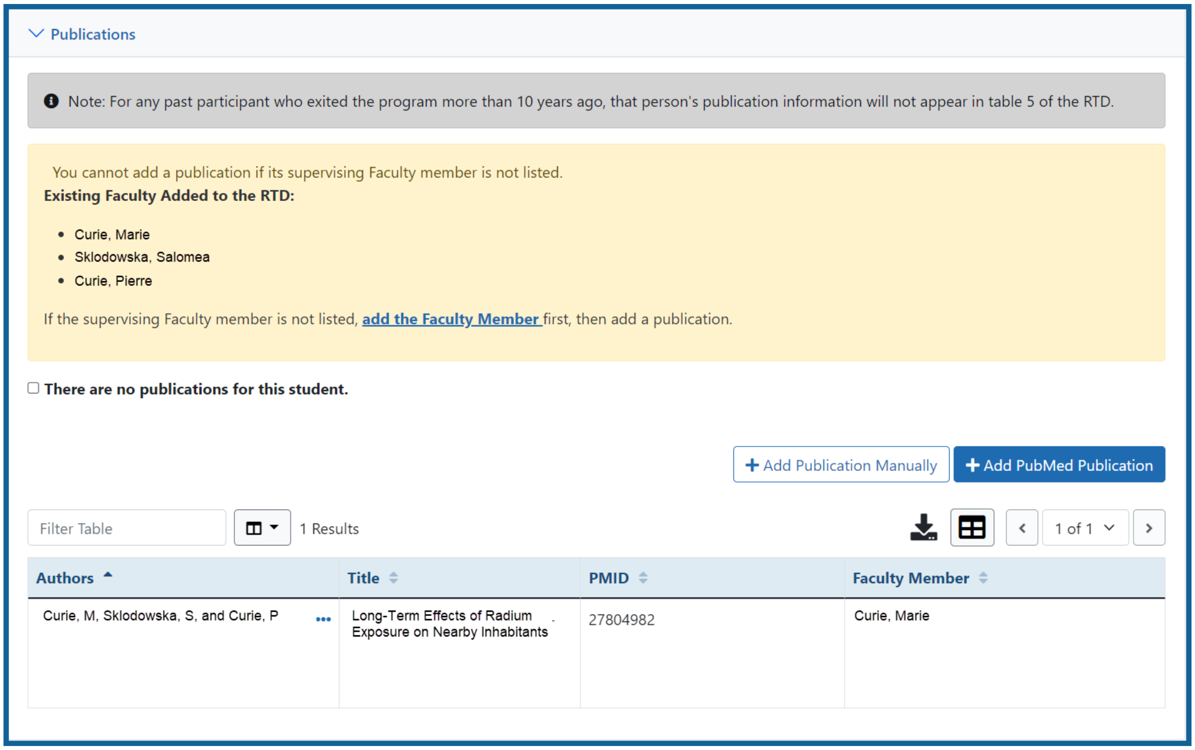
c. Select an option from the **Role during funding** dropdown.

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.



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:

1. 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**.
3. 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.

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.

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.
   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 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.

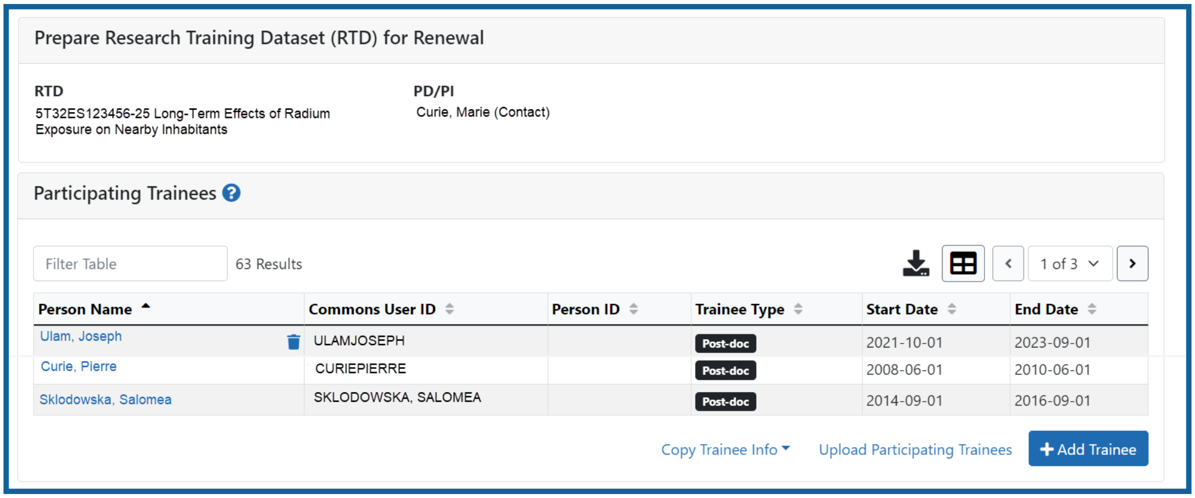


Figure 60: Participating Trainees

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** drop-down 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 **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.

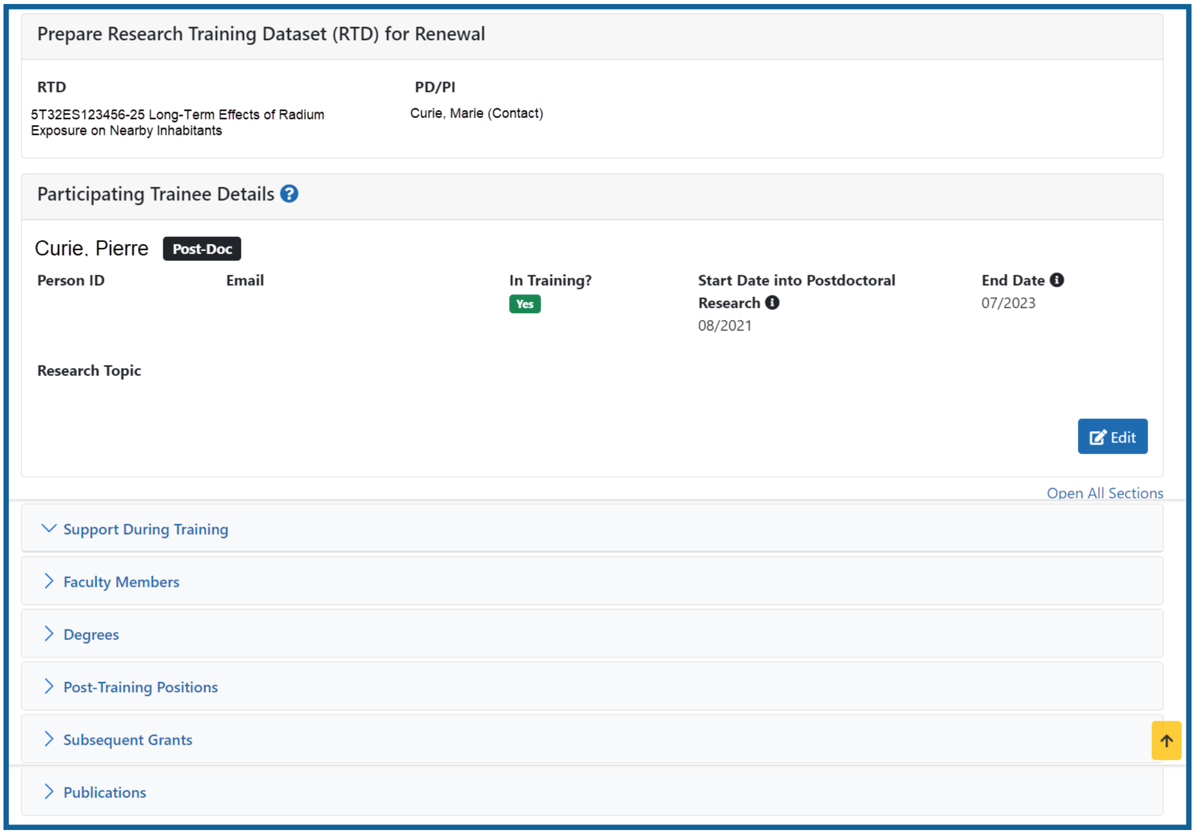


Figure 61: Participating Trainee Detail (Renewal)

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.

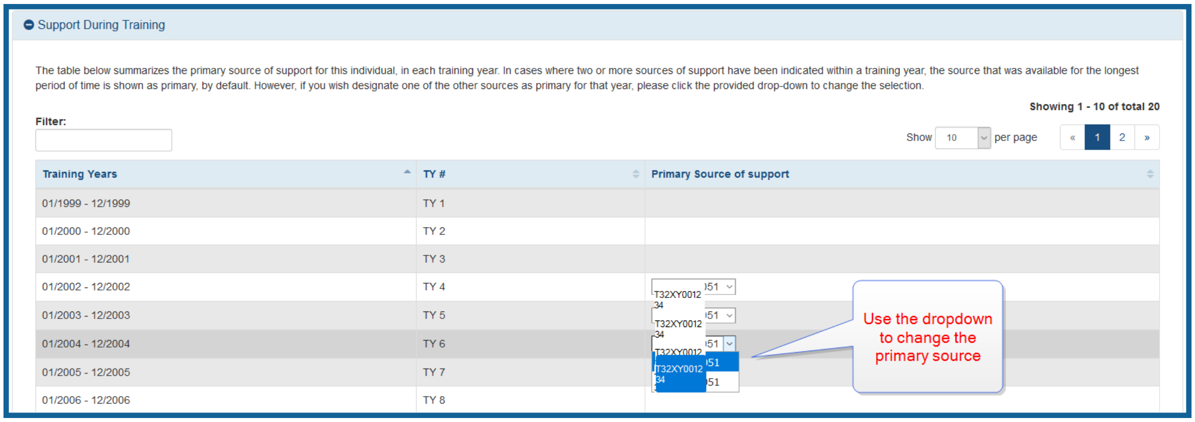
Support During Training

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.

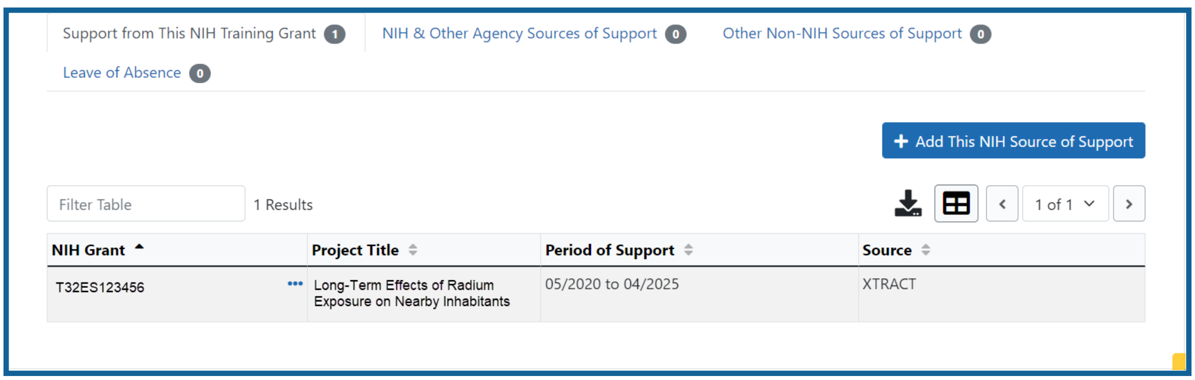
After a start date has been added for the trainee in *In Training Data*, the **Training Years (TYs)** will be displayed as read-only with corresponding abbreviations for funding sources in **Support During Training**.

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.



Support from This NIH Training Grant

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

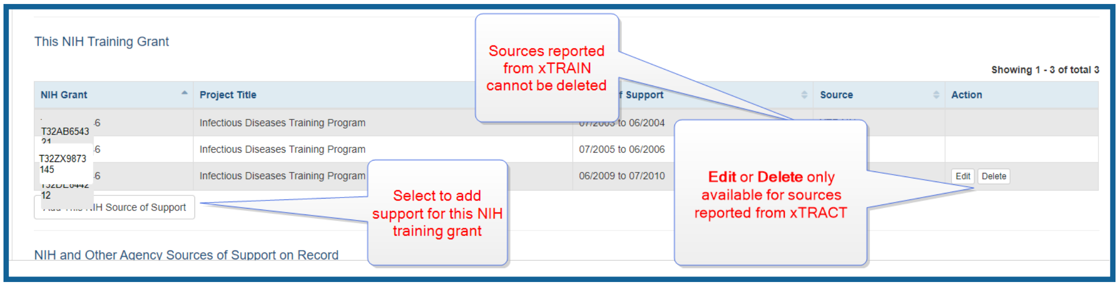


1. Click the **Add This NIH Source of Support** button to add support from **This NIH Training Grant**.
   a. Enter the start and end dates of funding, then click the **Save** button.
2. (Optional) To remove support from **This NIH Training Grant**, click the three-dot ellipsis button and select **Delete**.

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.



To add additional NIH or Other Agency support:

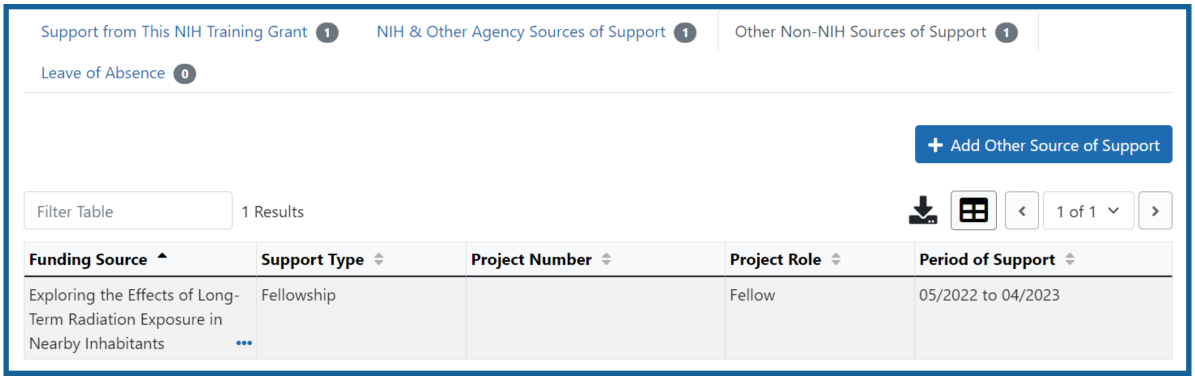
1. Enter **Start of Funding** and **End of Funding** to indicate the dates of this person's involvement.
2. Click the **Save and Exit** button.
3. Click the three-dot ellipsis button and select **Edit** to modify the source of support.
4. (Optional) To remove the source of support, click the three-dot ellipsis button and select **Delete**.

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.



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.

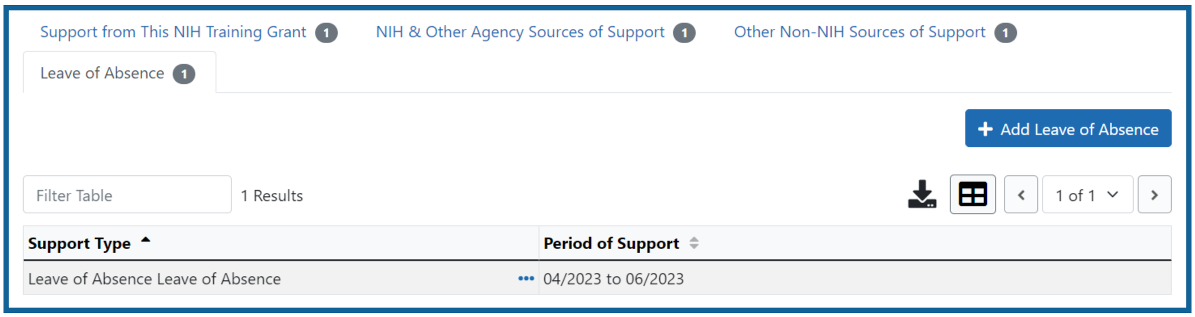
   b. To create a new source of support:

      - 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

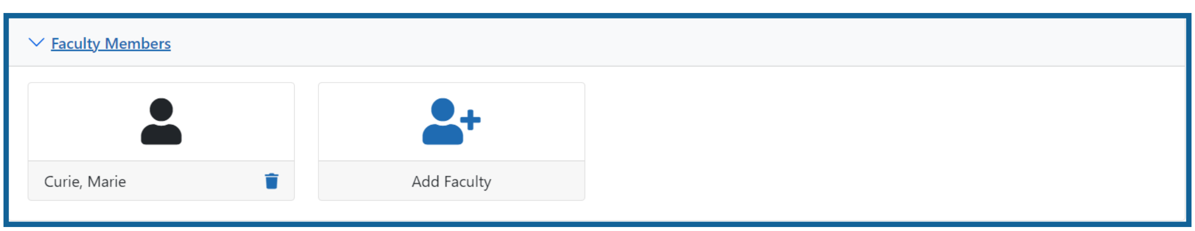
You can specify a Leave of Absence in this section to account for periods when the trainee remains on the grant but does not receive support from the grant.



To add a Leave of Absence:

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

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**.



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.

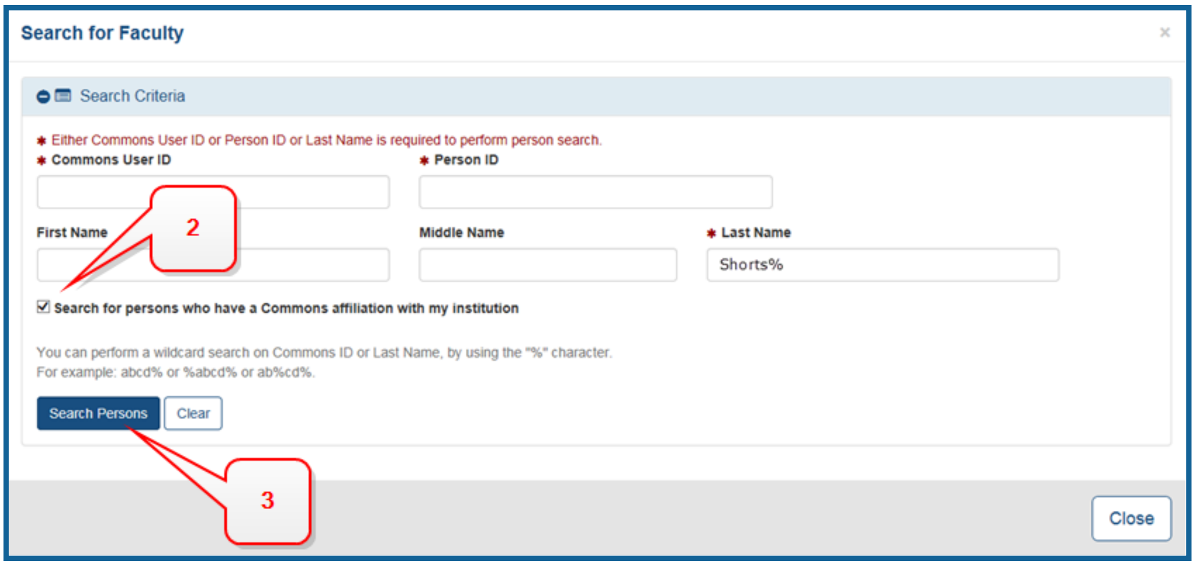


Figure 62: Search for Faculty

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.

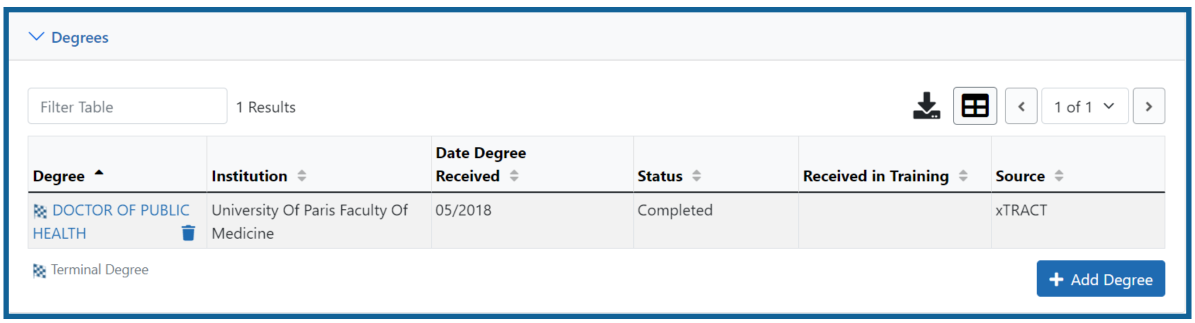
6. (Optional) Repeat the steps above to search for and add other faculty as necessary.

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.



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.

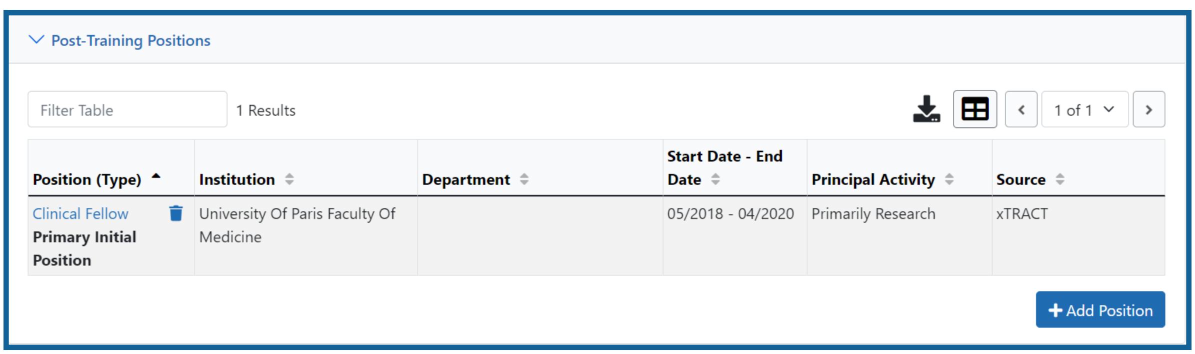
- **Degree Status**: Select Completed or In Progress, as appropriate
- **Received in Training**: Select Yes or No. Up to three degrees can be set as Received in Training.
- **Degree Institution**: Enter the institution name, one institution per degree. You can search for an institution by selecting the 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 **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.



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.

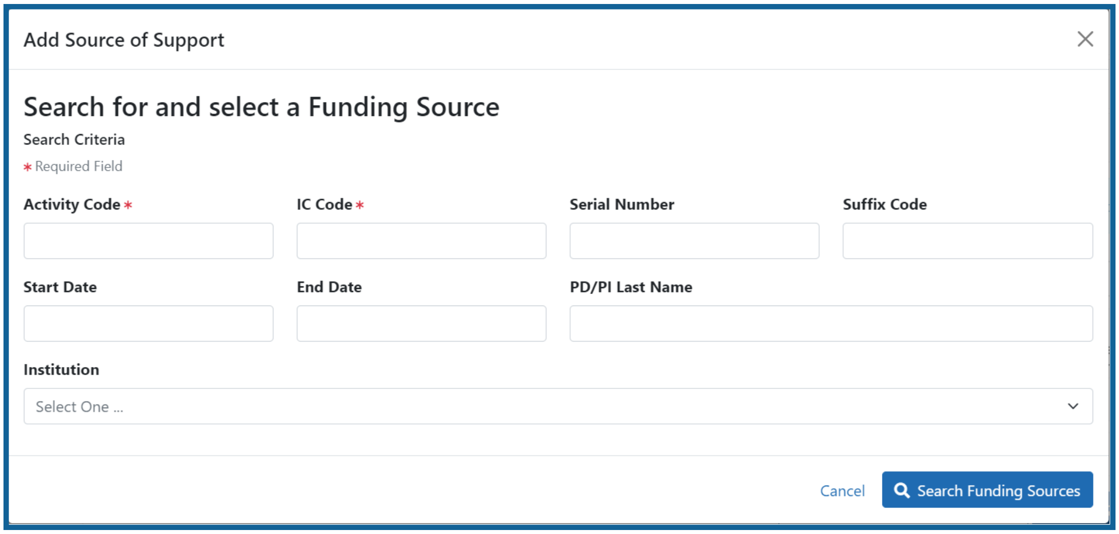
Add Other Source of Support button: Add sources of grant support received from non-NIH/Agency sources.

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.

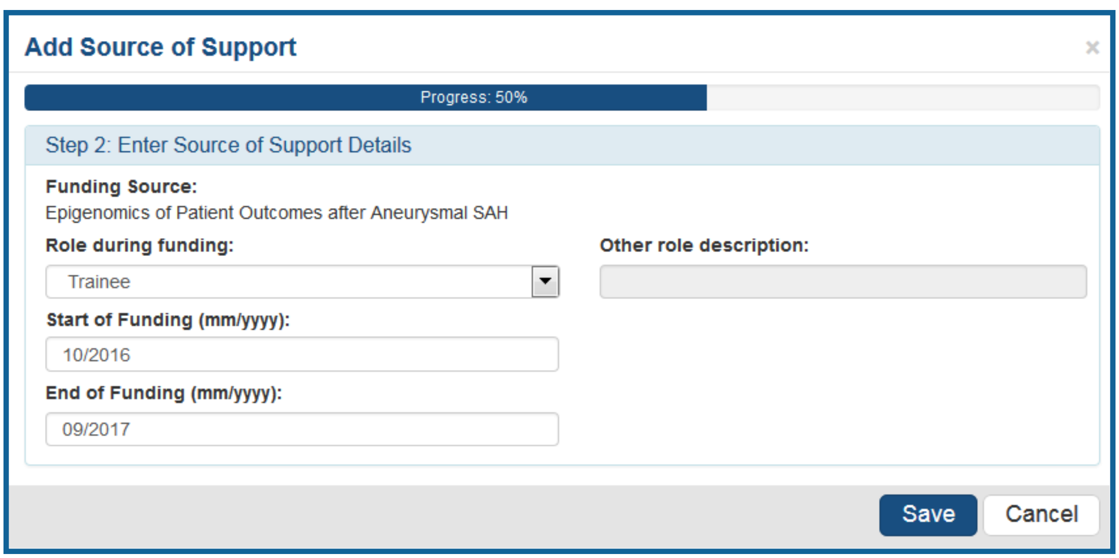
Sources of support that you include on the RTD must list the trainee/student in a project role such as PD/PI, co-investigator, faculty collaborator, or staff scientist. If you mark the checkbox of a record with a non-supported project role, an error will occur when you mark the checkbox, which states: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



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.

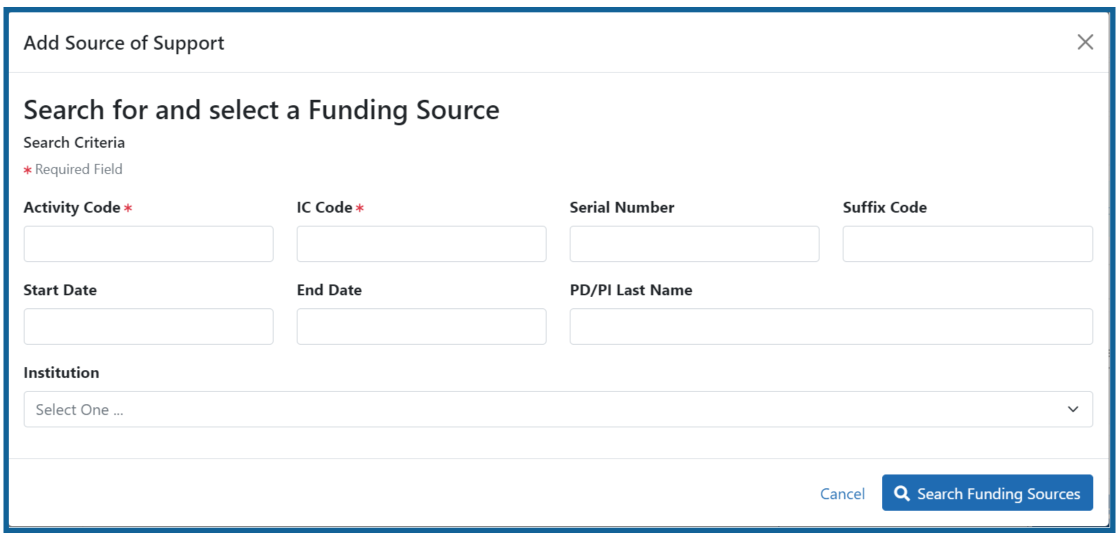


7. Click **Save and Exit**. Alternatively, if you want to add another funding source, click **Save and Add Another Source of Support** to be returned to the funding search popup.

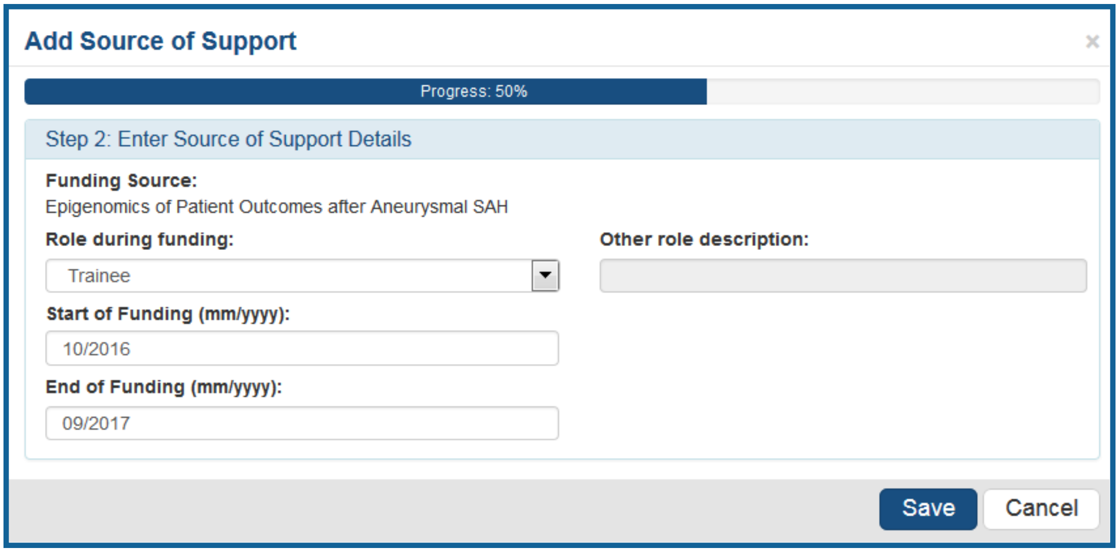
To add NIH or Agency support by indicating a generic activity code/IC:

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.



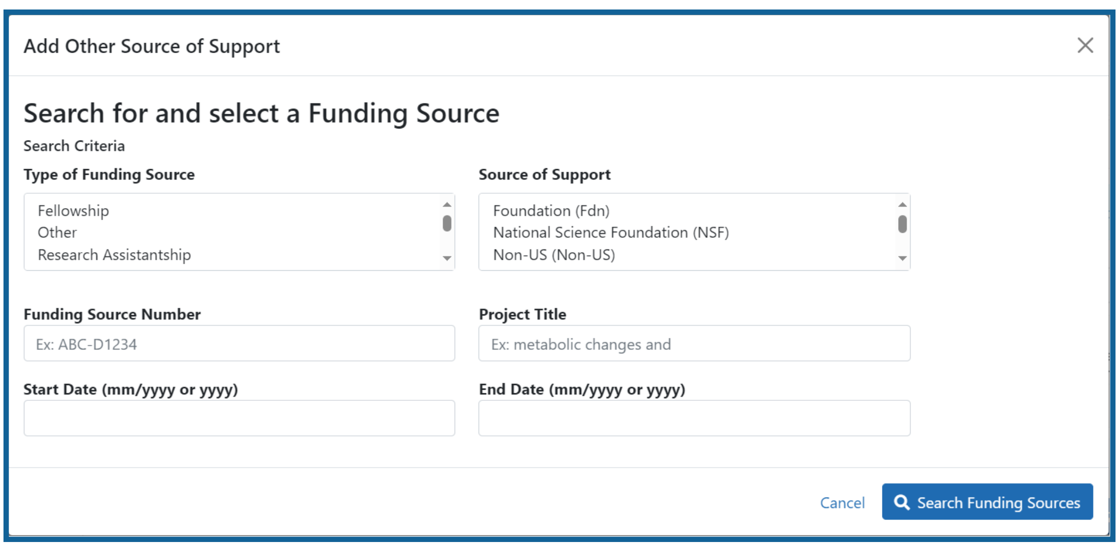
2. In the search criteria, enter an activity code and IC ONLY, and then click the **report activity code and IC directly** link.
3. TIn the search results, click the **Select this Funding Source** button for the funding source you want to add.
4. Select the appropriate option from the **Role during funding** 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.



6. 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.

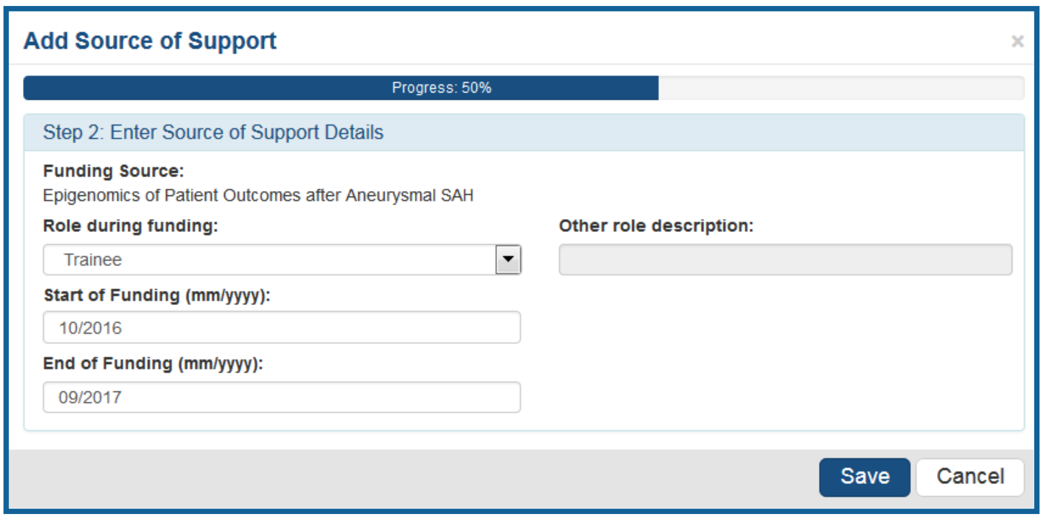
To add support from non-NIH/Agency sources of support:

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



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.



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 funding search popup.

Publications

List peer-reviewed publications and manuscripts accepted for publication in peer-reviewed 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:

1. 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**.
3. 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.

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.

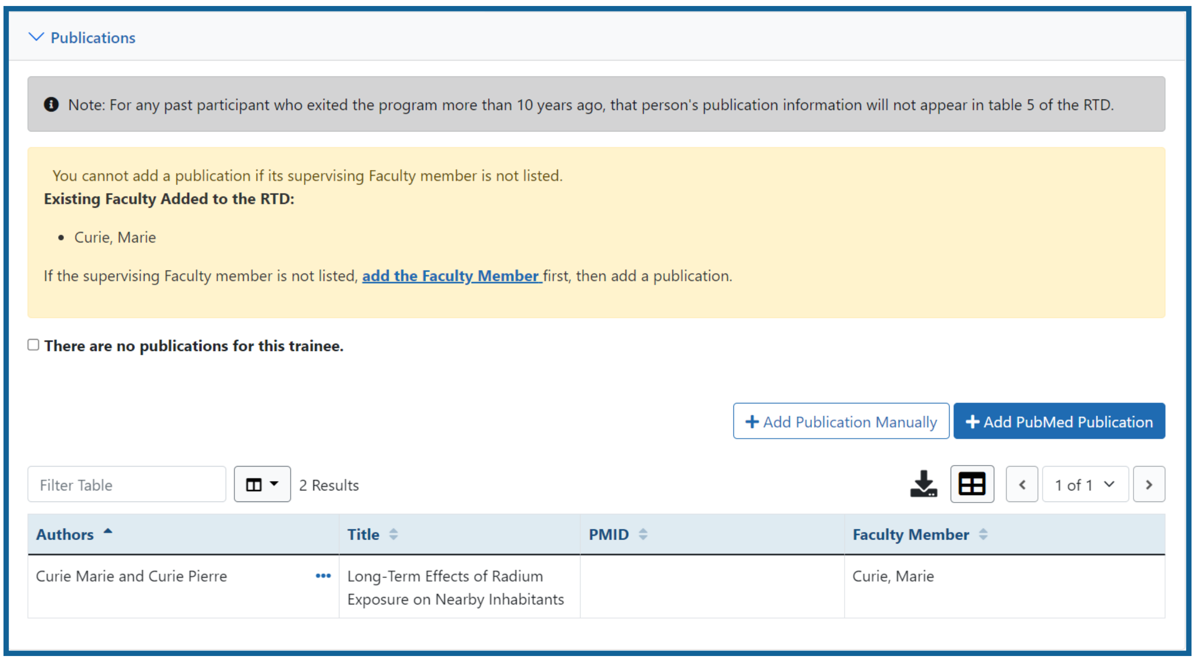
    b. You can enter multiple authors to compile a list of all authors of the publication. To add an author, enter the author’s name in the **Authors** text box and click the **Add New Author** button.

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.

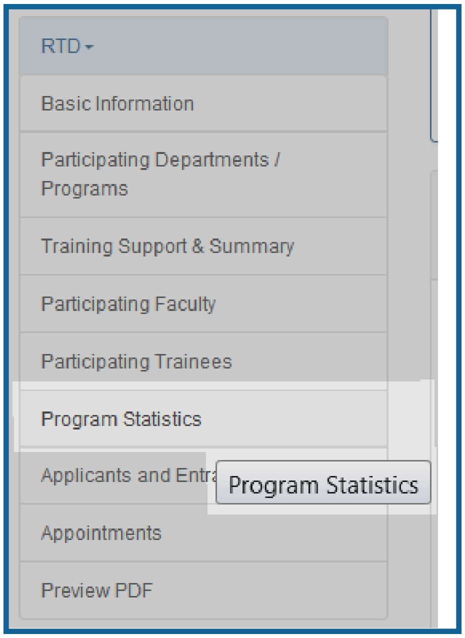


Click the three-dot ellipsis button and select **Edit Publication** or **Delete Publication** to update or remove a publication.

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.



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 Pre-doctorate 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).

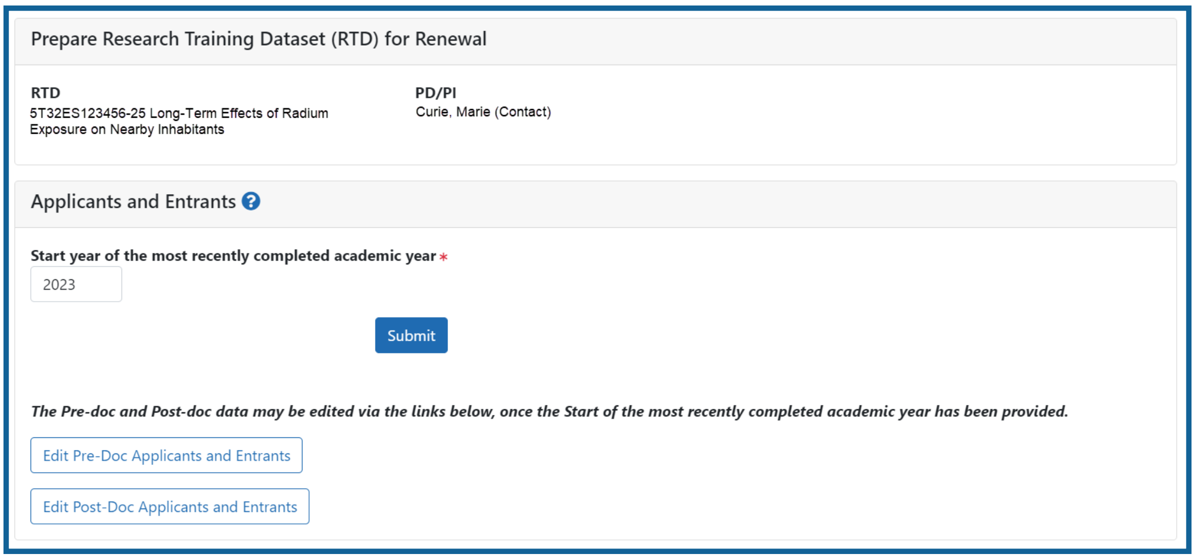


Figure 63: Applicants and Entrants

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.

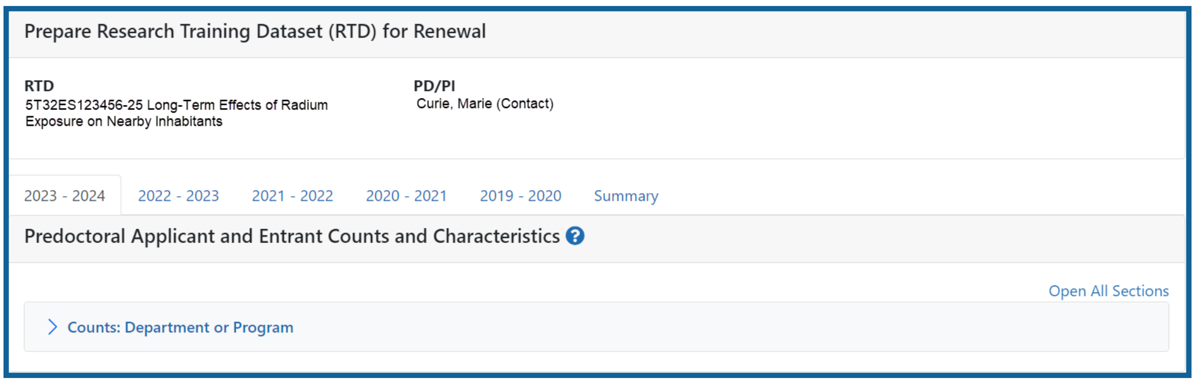


Figure 64: Predoctoral Applicant and Entrants Counts and Characteristics

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 (Renewal)

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.

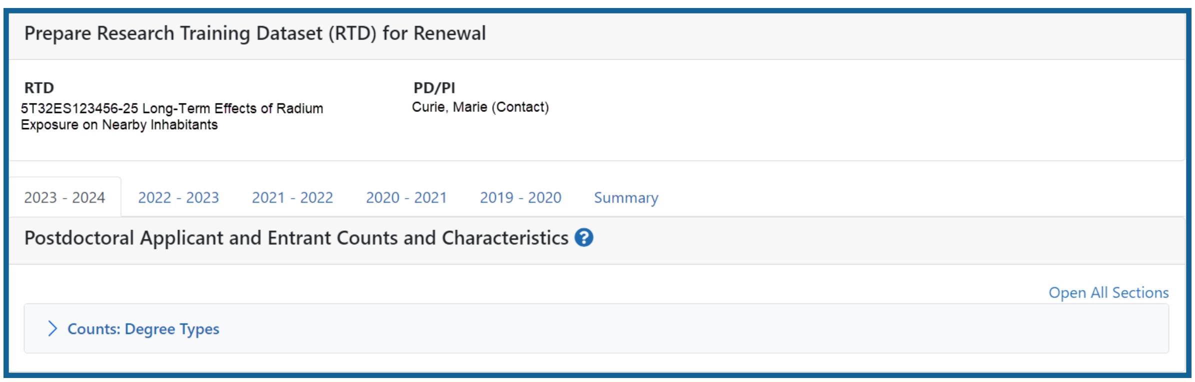


Figure 65: Postdoctoral Applicant and Entrants Counts and Characteristics

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

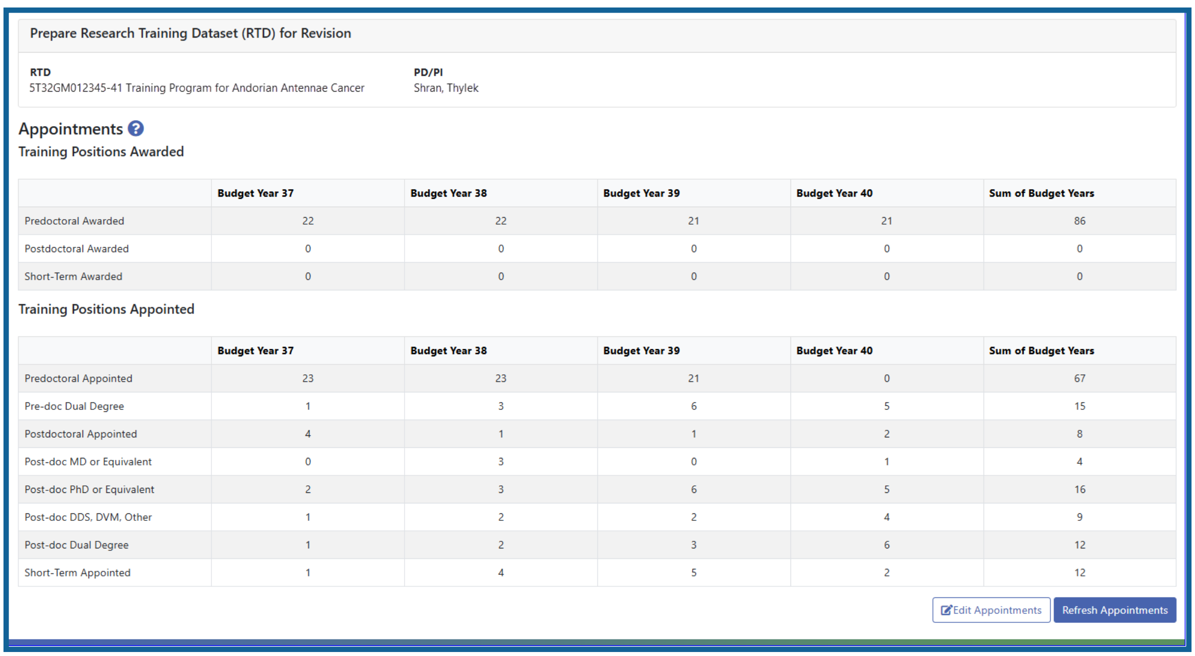
Select the **Summary** tab to display a summary for postdoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.

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.



Prepare Research Training Dataset (RTD) for Revision

RTD
5T32GM012345-41 Training Program for Andorian Antennae Cancer

PD/PI
Shran, Thylek

Appointments

Training 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

Training Positions Appointed

	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
Short-Term Appointed	1	4	5	2	12

Edit Appointments
Refresh Appointments

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.

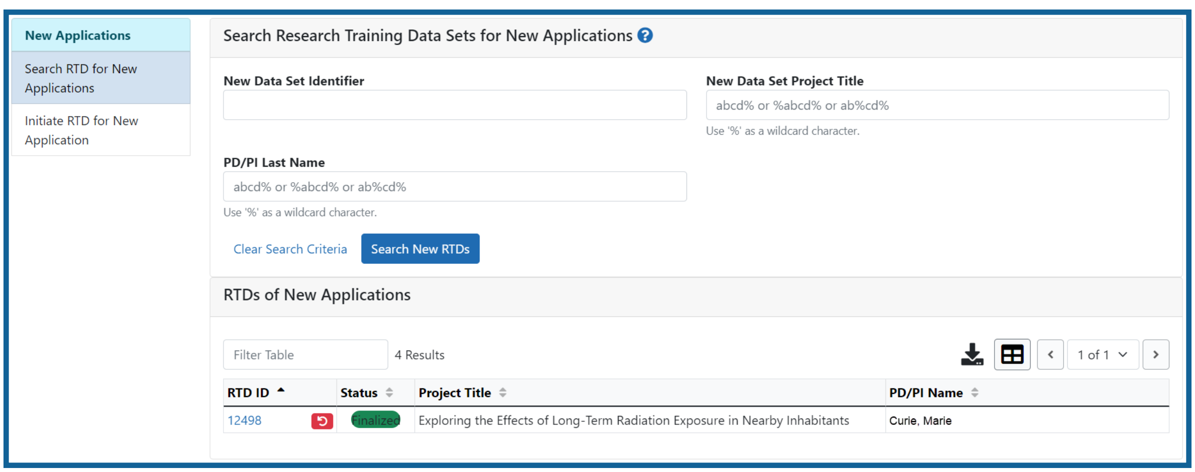
   A confirmation message warns: Are you sure you want to finalized this RTD? Once finalized, the RTD cannot be edited?

   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.



Click the hyperlinked RTD ID to view the PDF.

Click the  **Unfinalize 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 Revision** 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.

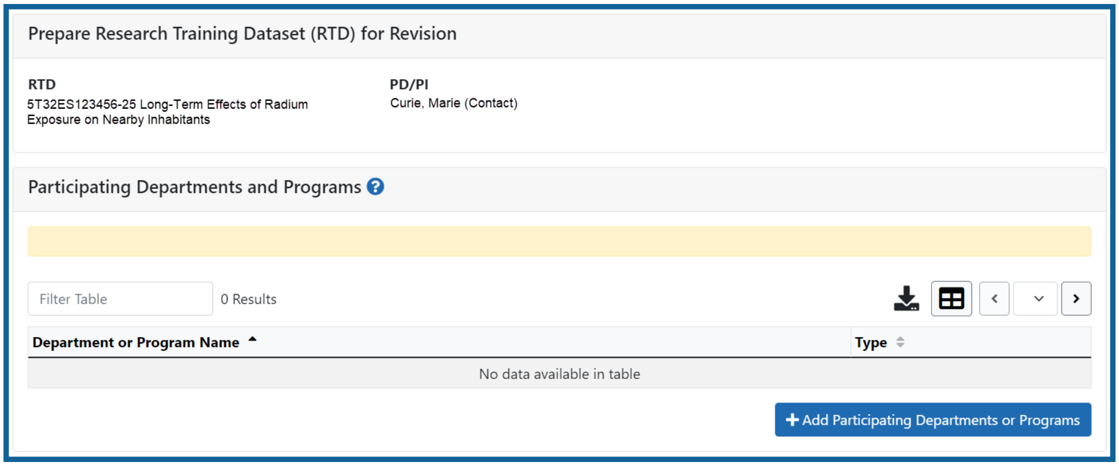


Figure 67: Adding Departments

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.

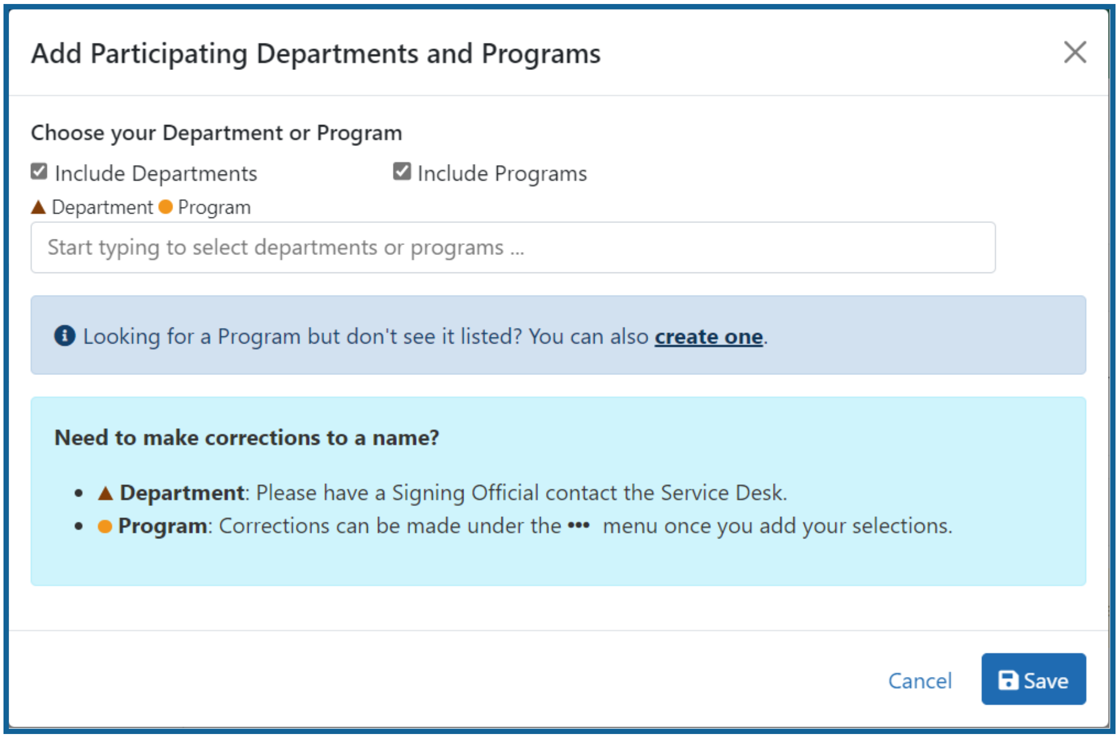


Figure 68: Searching for Departments

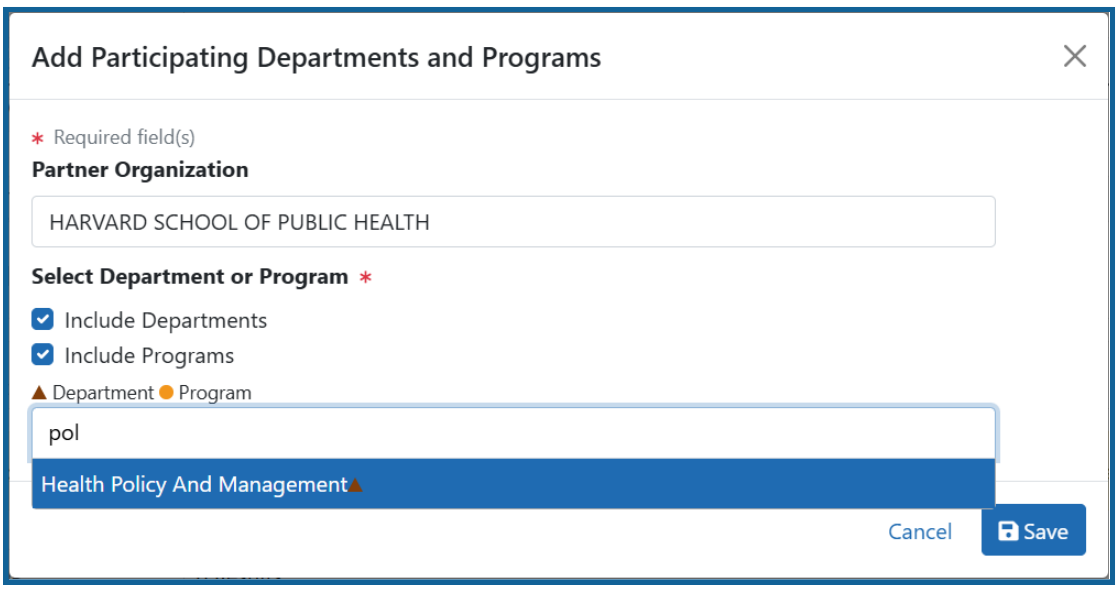


Figure 69: Selecting the Department

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.

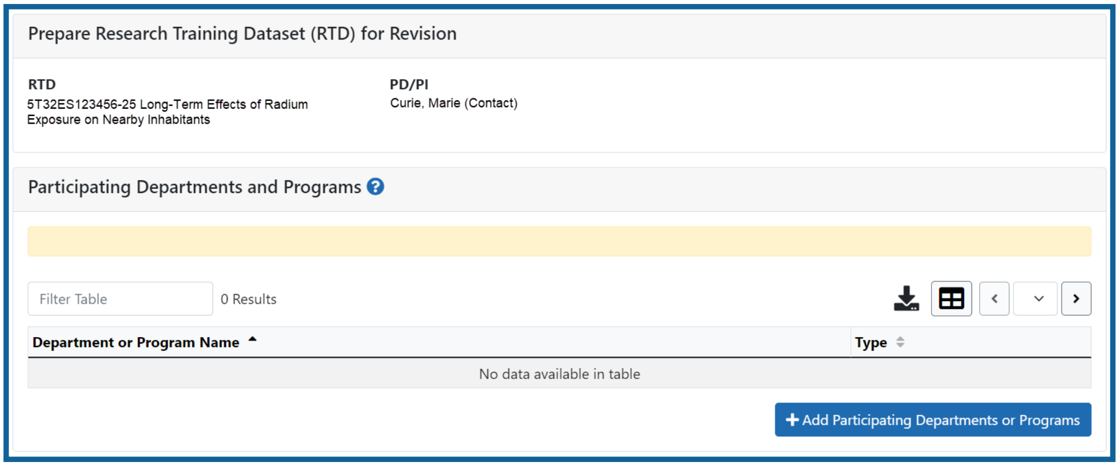


Figure 70: Add Participating Departments or Programs Button

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**.

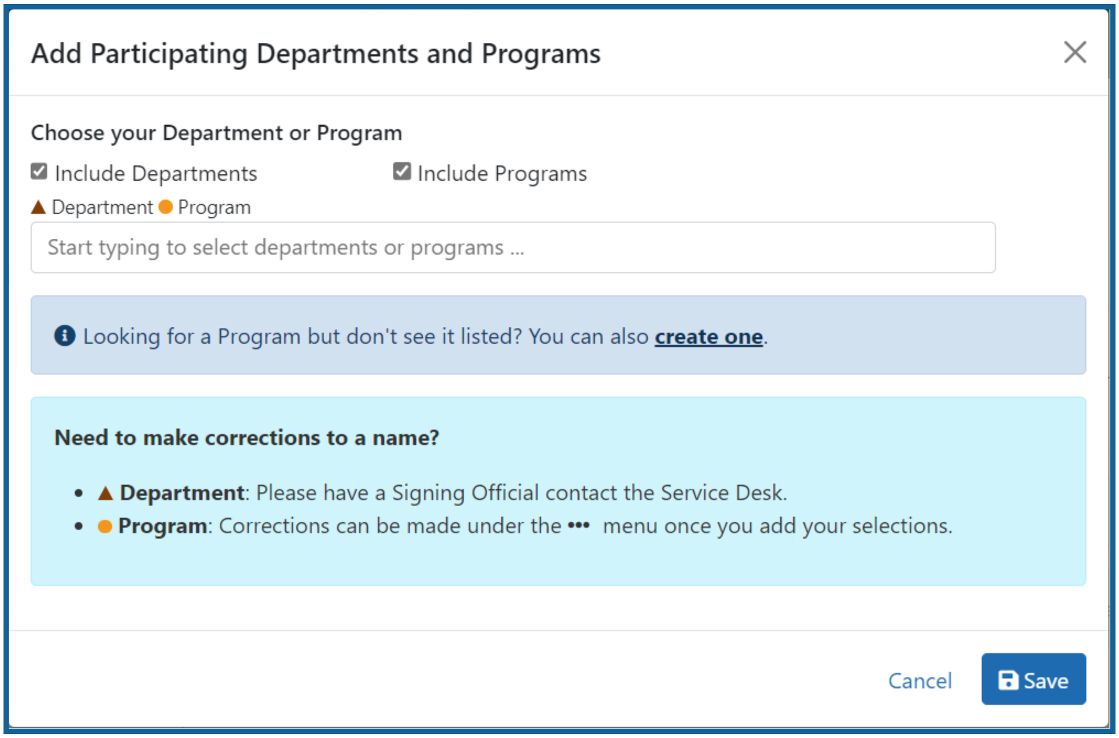


Figure 71: Searching for Programs Displaying Create One Hyperlink

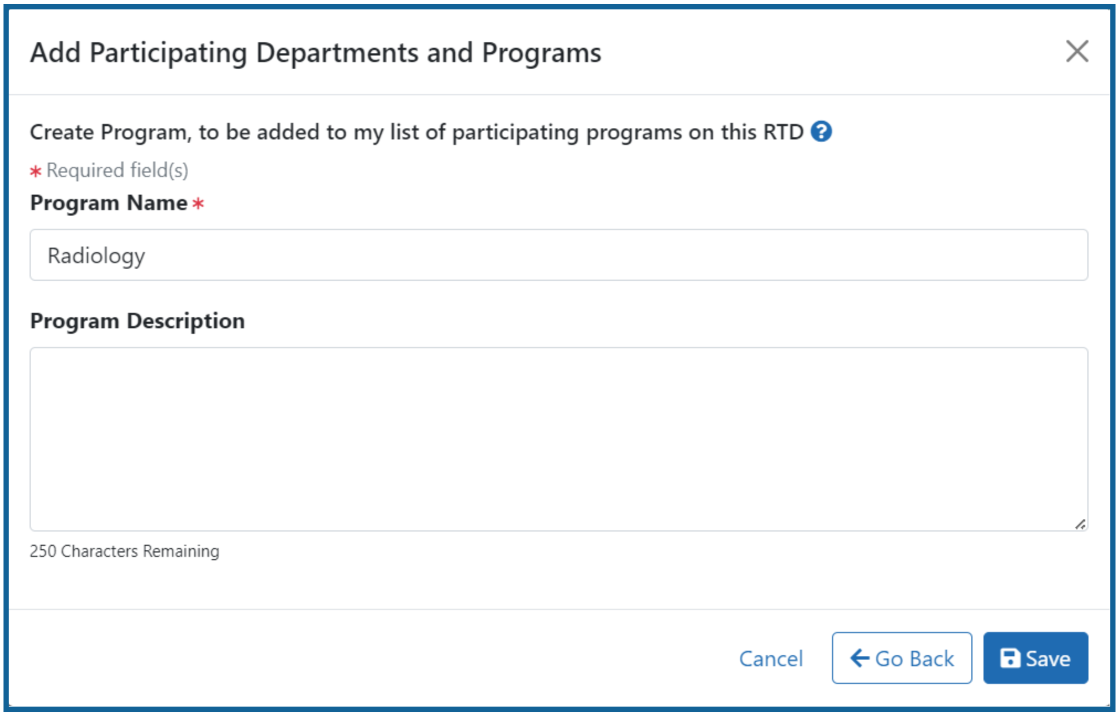


Figure 72: Searching for Programs

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.

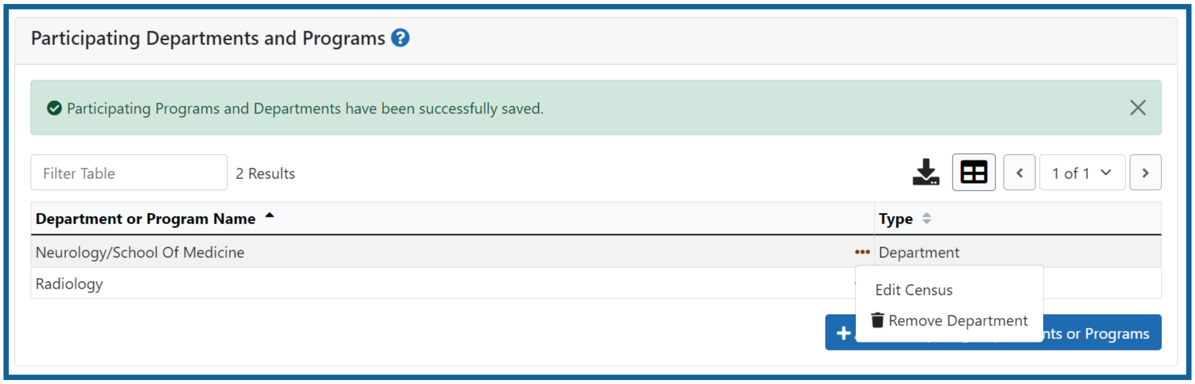


Figure 73: Edit Button for Programs and Departments

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)

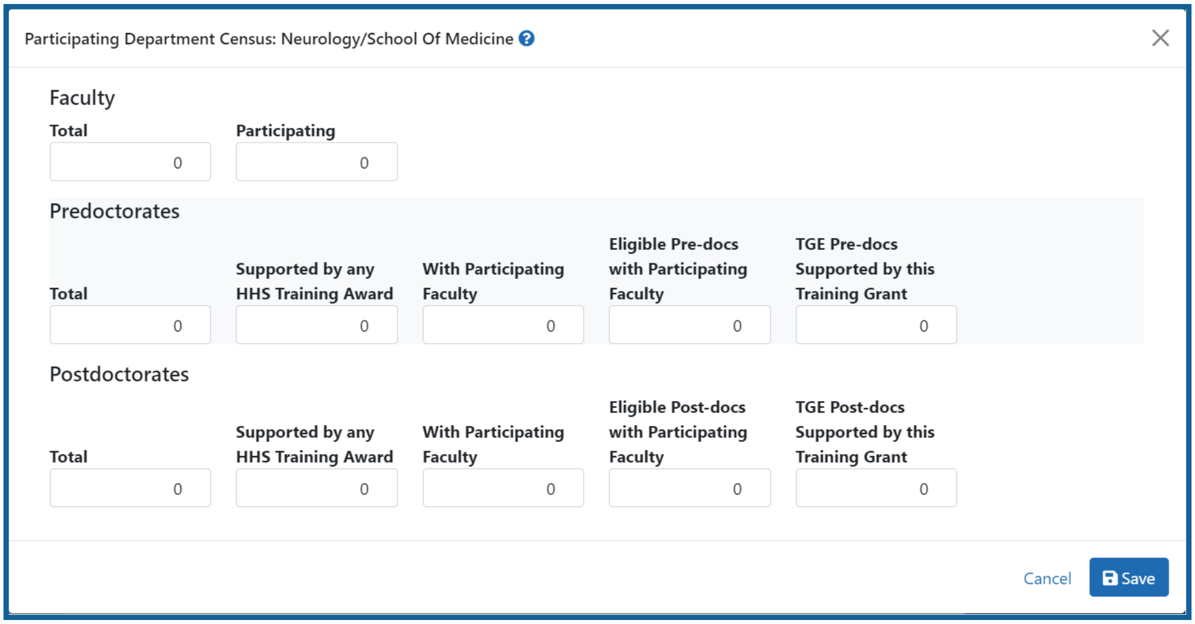
Postdoctorates

- 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



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.

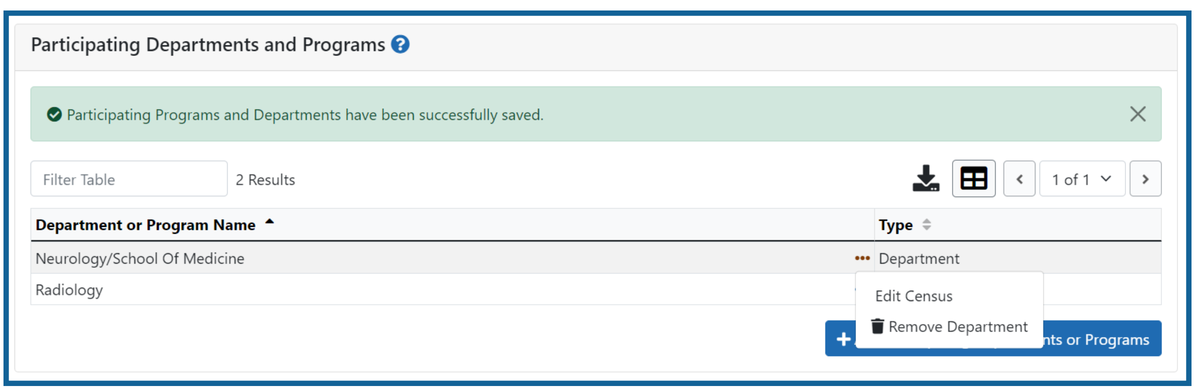


Figure 74: Edit Button for Programs and Departments

Update the Census information as necessary.

Faculty

- Total
- Participating

Predoctorates

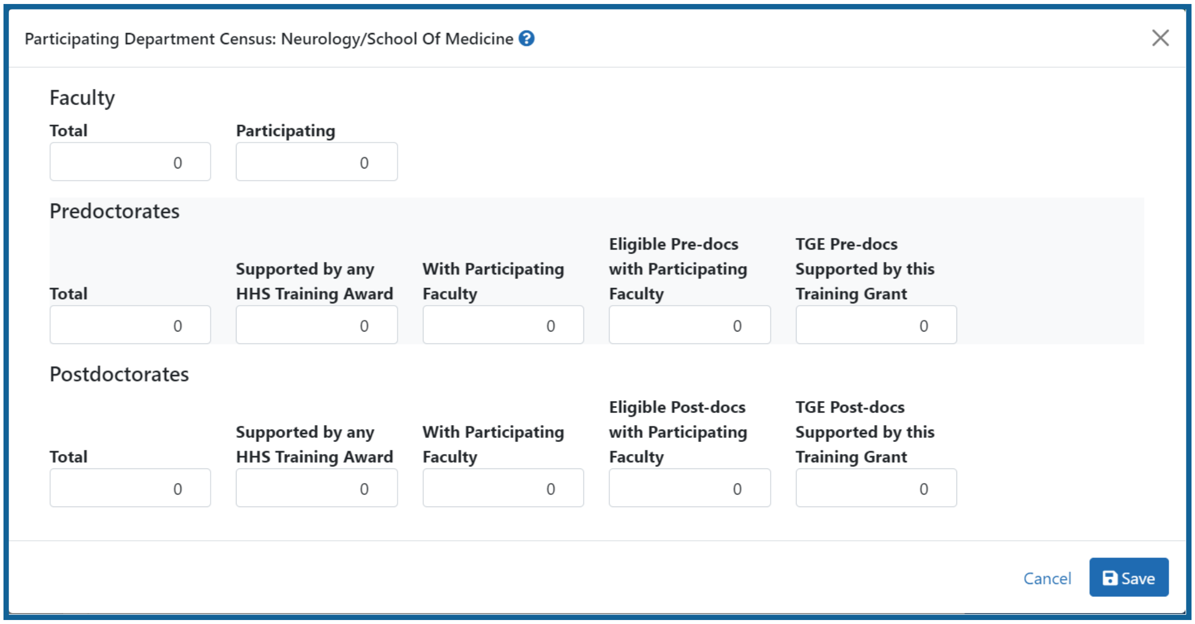
- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

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



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.

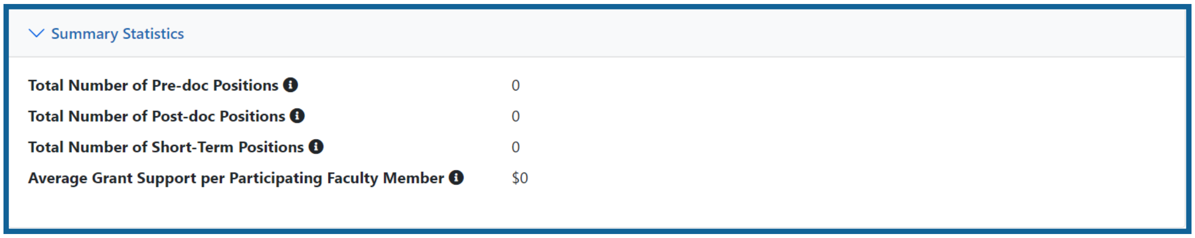


Figure 75: Training Support & Summary

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.

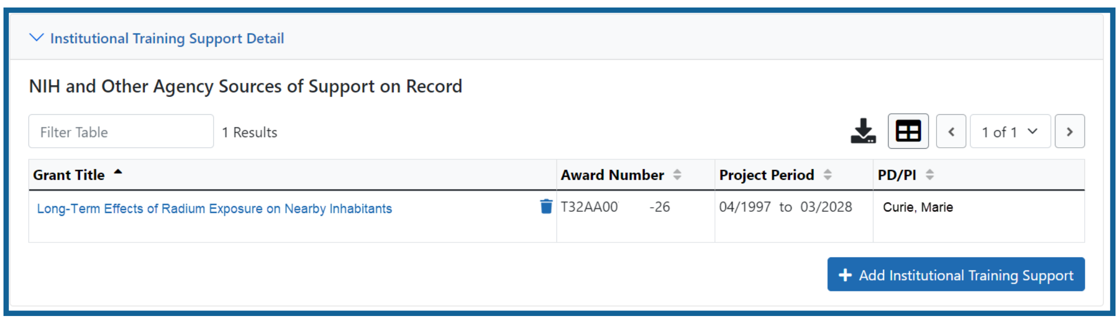


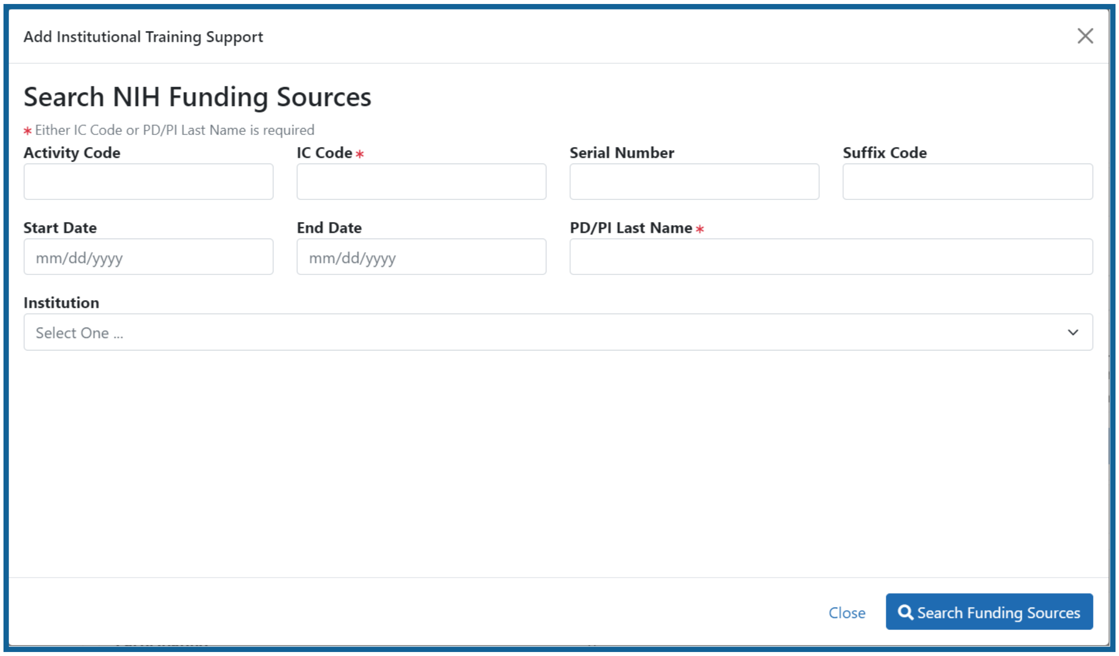
Figure 76: Add Institutional Training Support Button

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.



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.

Predoc

The following read-only information is displayed. This data is maintained on the **Participating 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 **Participating 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.

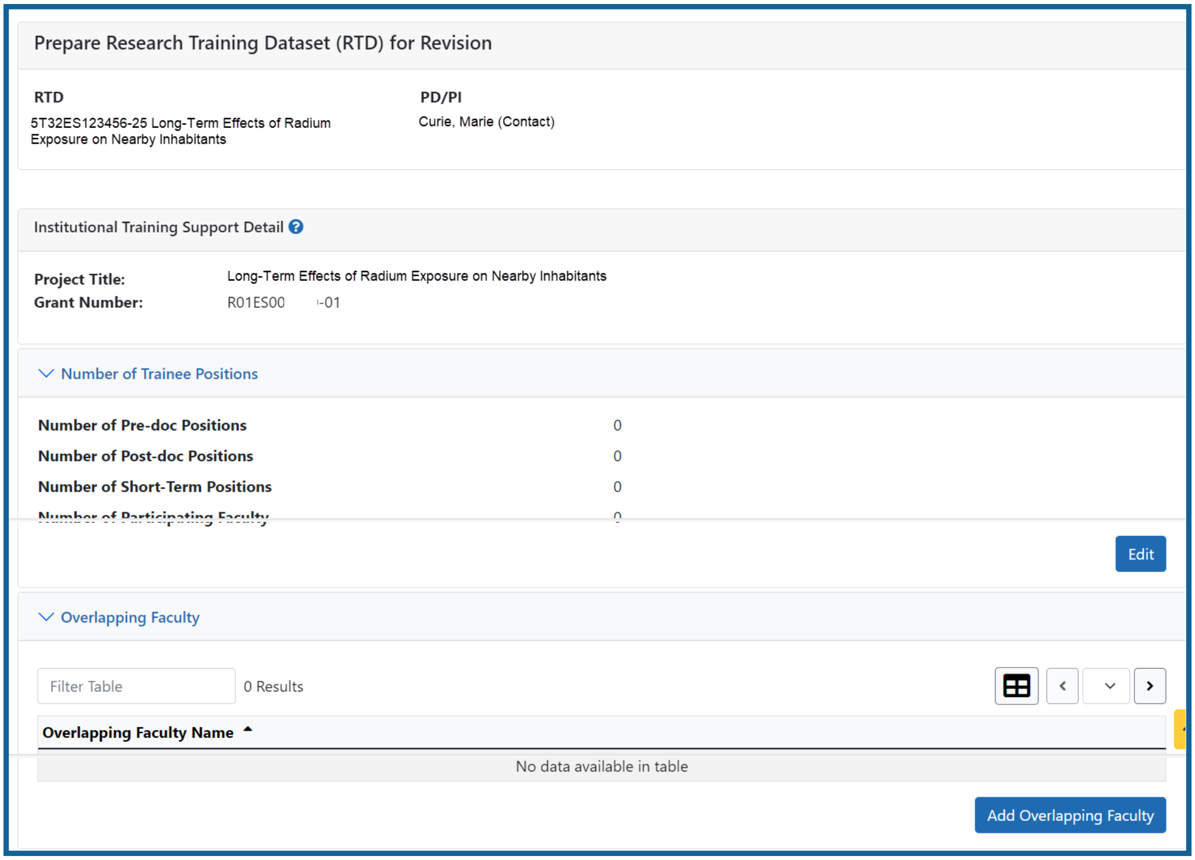


Figure 78: Institutional Training Support Detail

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.

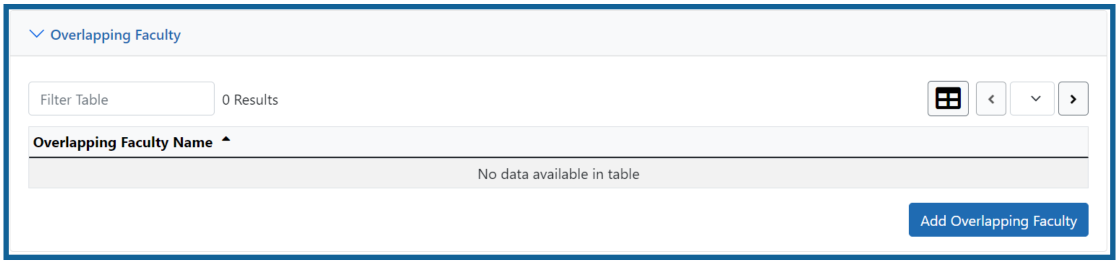


Figure 79: Add Overlapping Faculty Button

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.

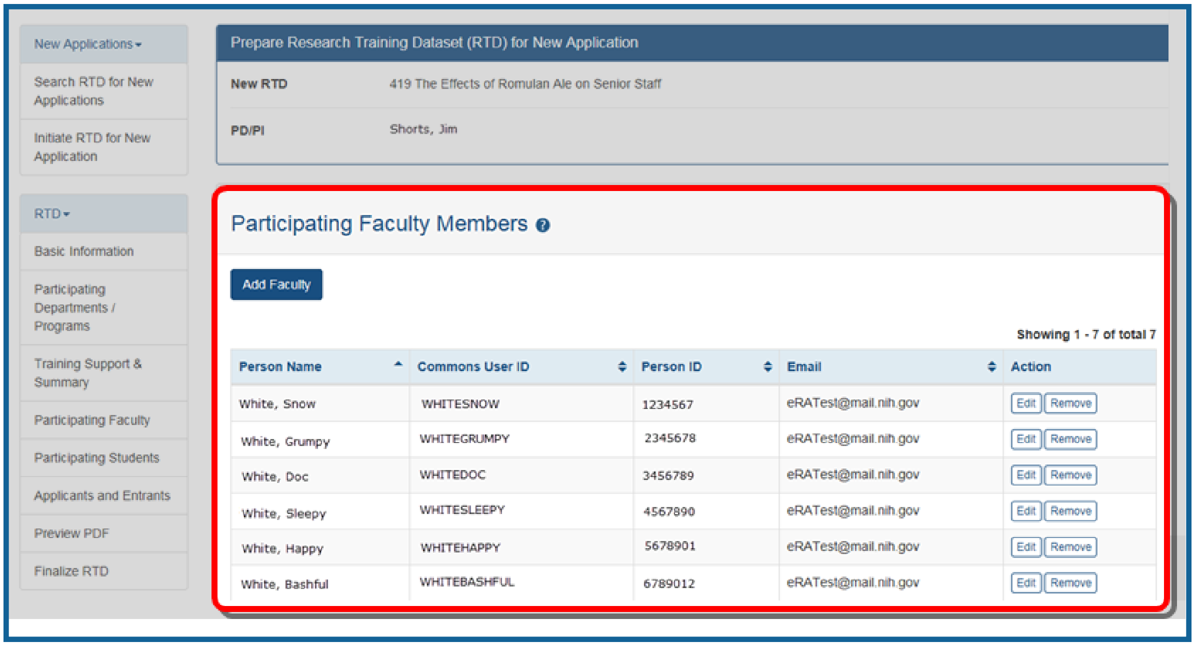


Figure 80: Participating Faculty Members

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.

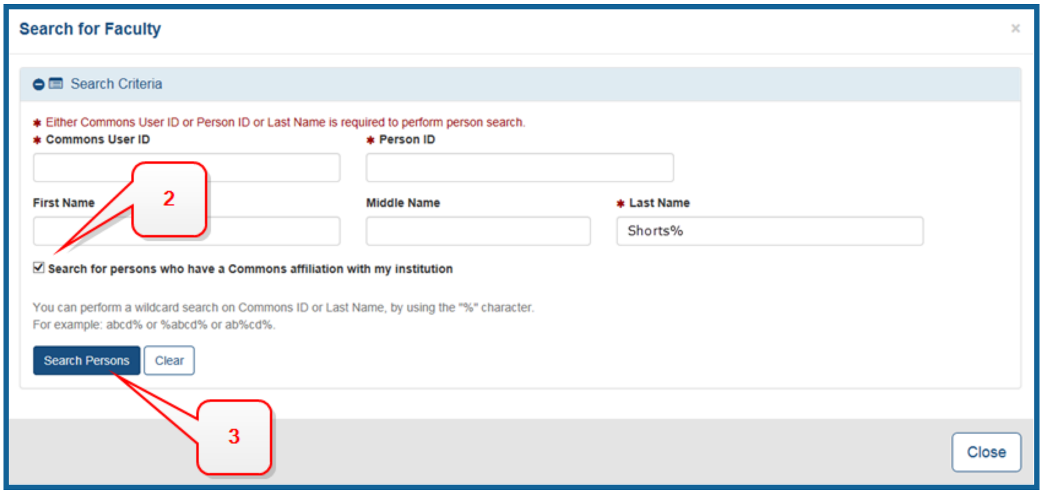


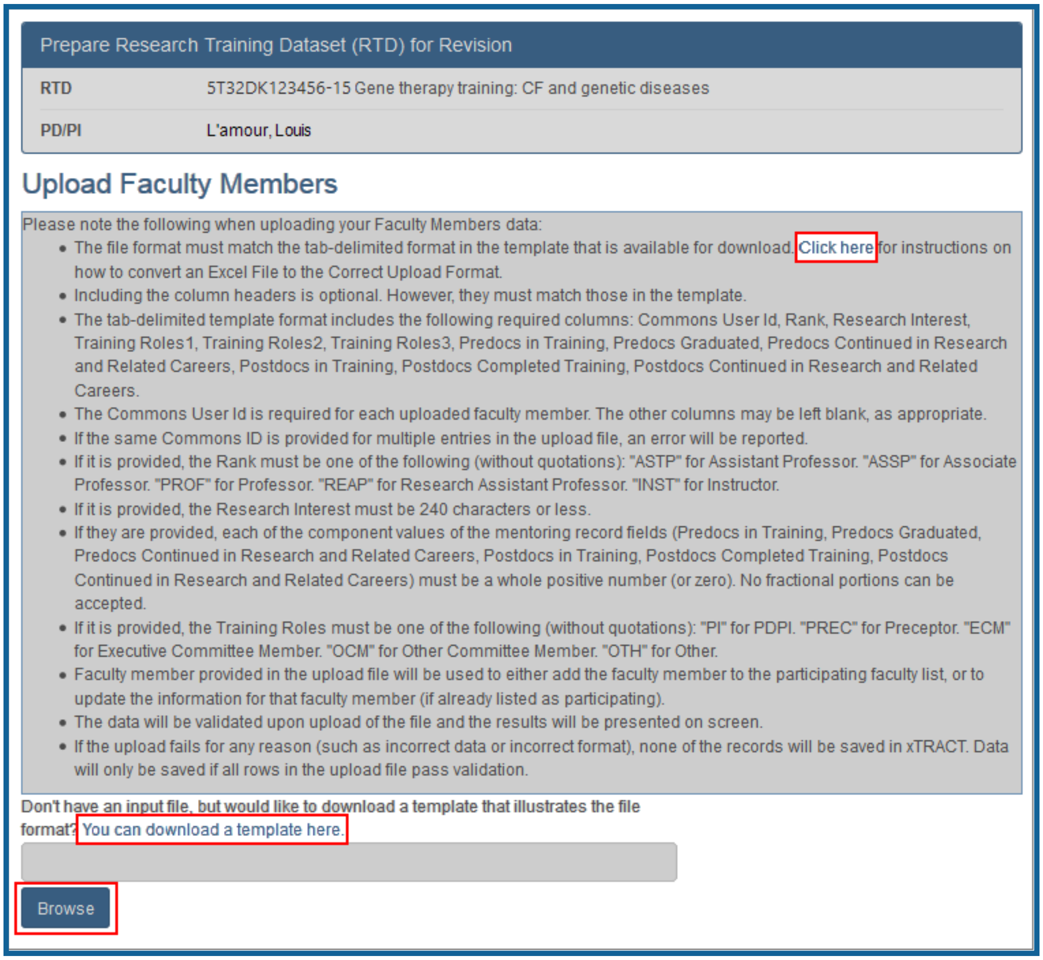
Figure 81: Search for Faculty

3. 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?

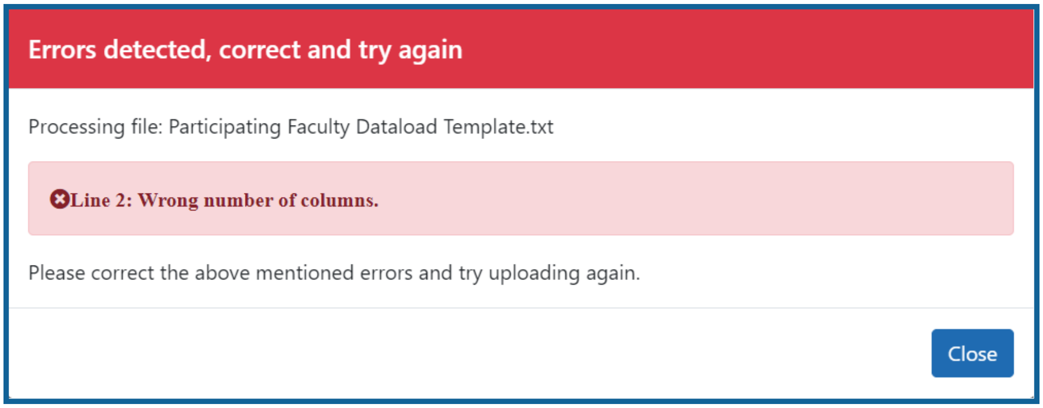
- Select the **Upload Participating Faculty** button below the table.

1. 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.

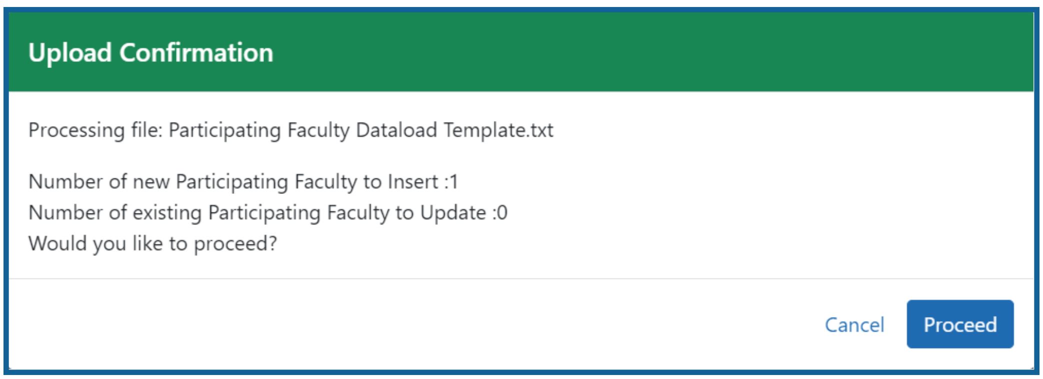


2. Once the upload file has been prepared, use the **browse** link to select and upload the file.
3. If there are any errors in the upload file, a message will appear above the file-name with a link to details of the errors. These errors will need to be cor-

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, Pre-docs 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.

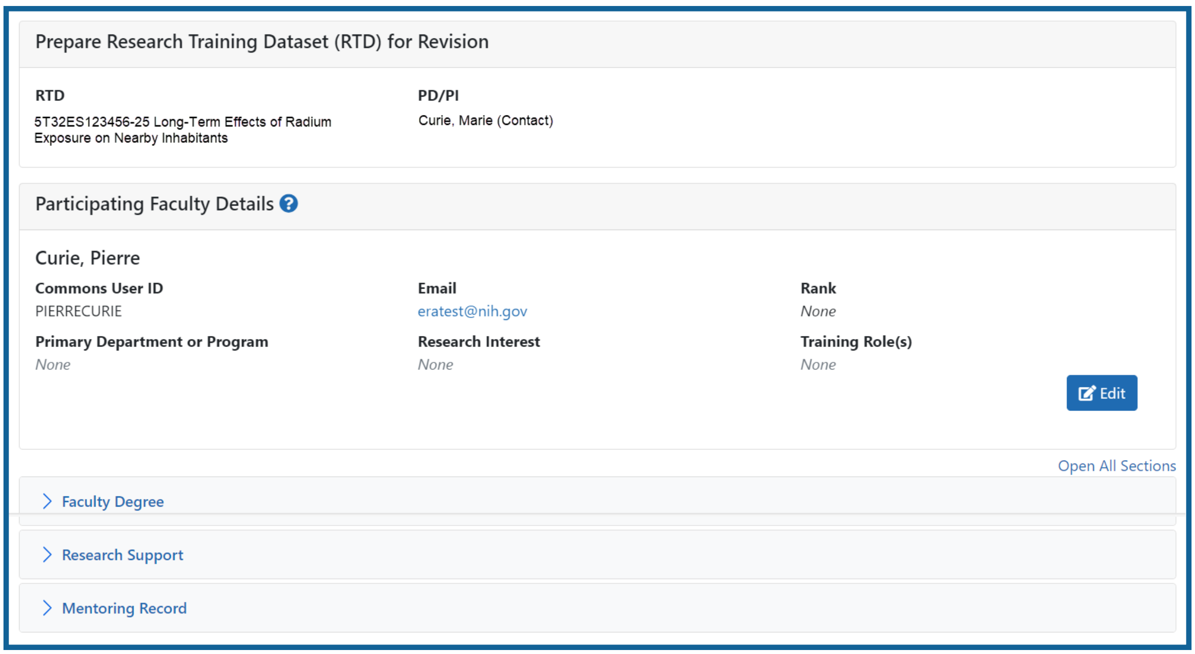


Figure 82: Participating Faculty Details

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

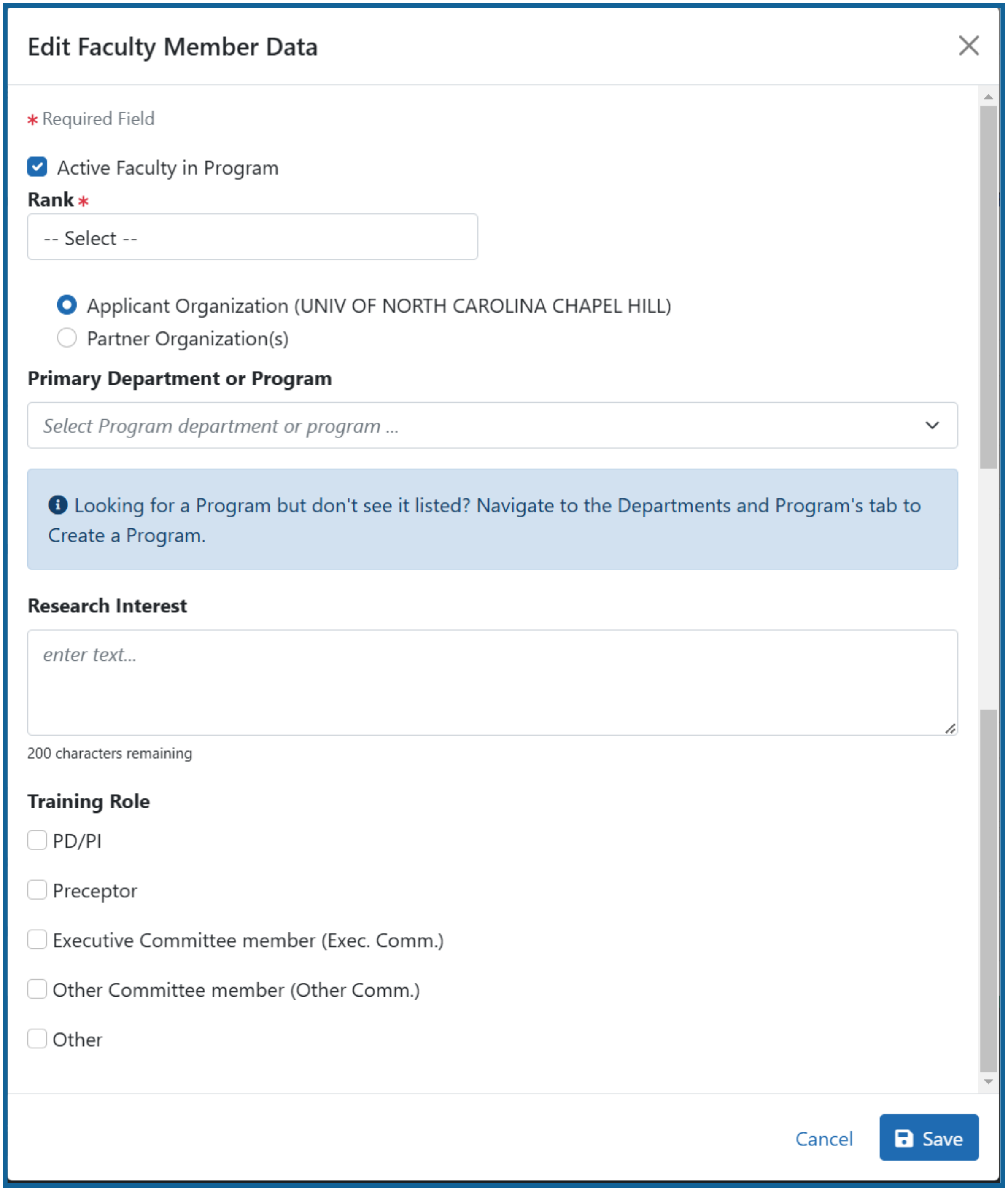
Participating Faculty Details

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:



2. 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.

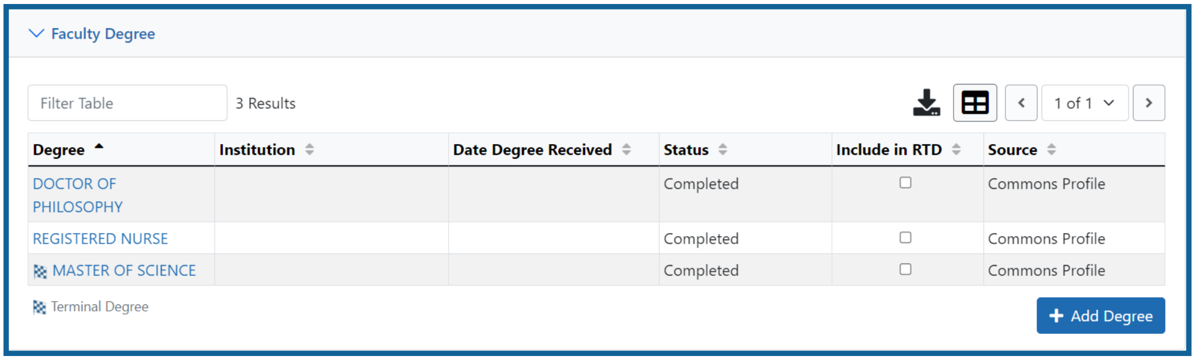
   NOTE: If you select a partner organization and the desired program or department is not listed, contact the organization's signing official to have them create it.

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.



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.
2. 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.

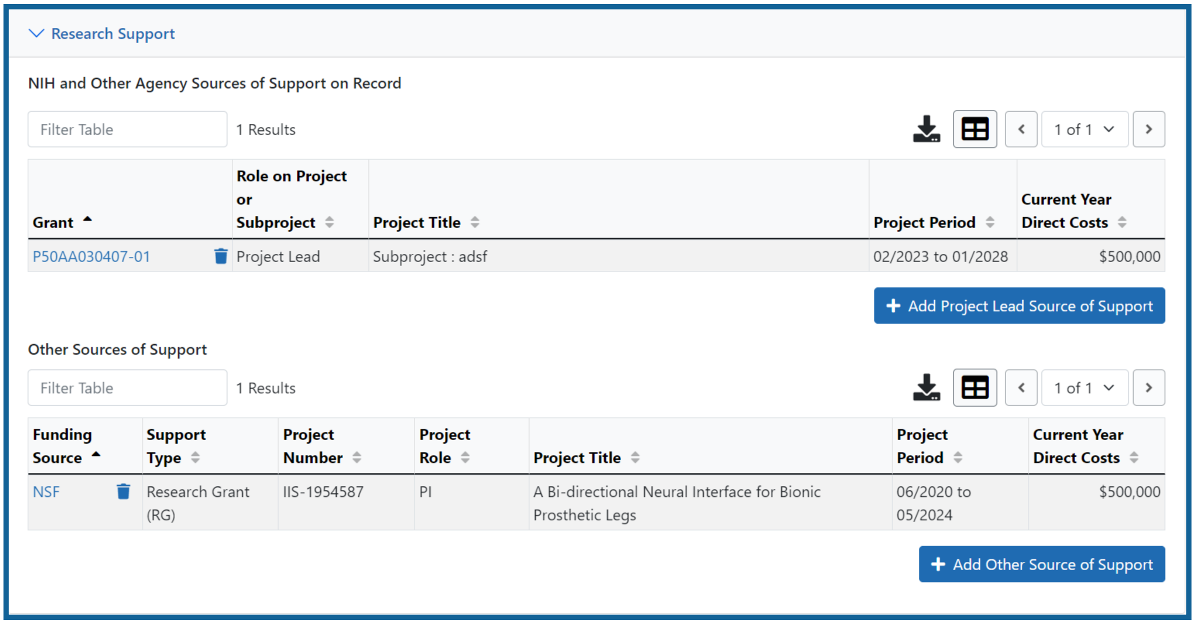
Delete a Degree

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 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.

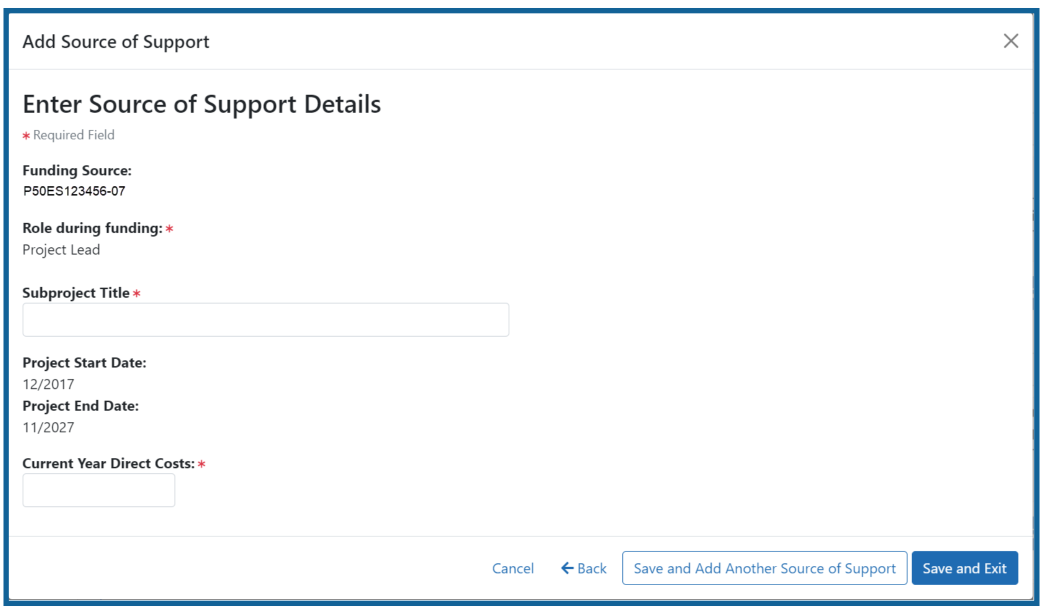
Use the **Add Project Lead Source of Support**button to search for other NIH or Agency grants that contain sources of support. If the faculty member is reported on an RPPR, then those grants will be displayed as suggested sources of funding, but you can also find and choose grants outside of that suggested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

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

1. 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.

3. Enter search criteria in the *Add Source of Support* window and click the **Search** button.
4. In the search results, click the **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.



6. 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

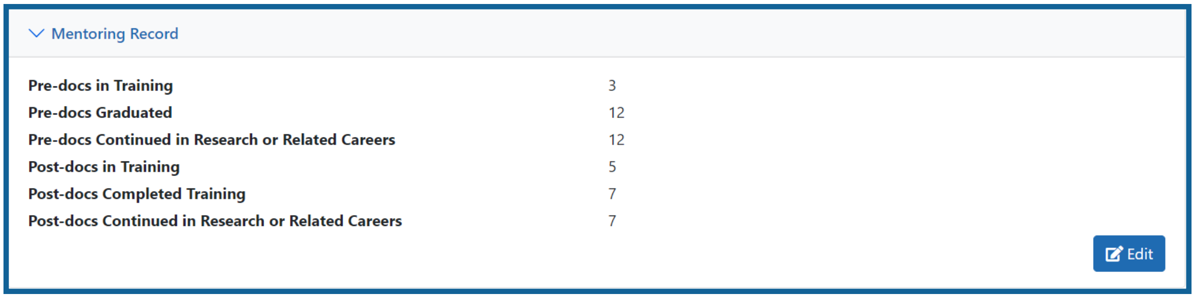
Includes Funding Source, Support Type, Project Number, Project Role, Project Title, Project Period, and Current Year Direct Costs.

To add additional support:

1. 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 **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.
5. 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.



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.

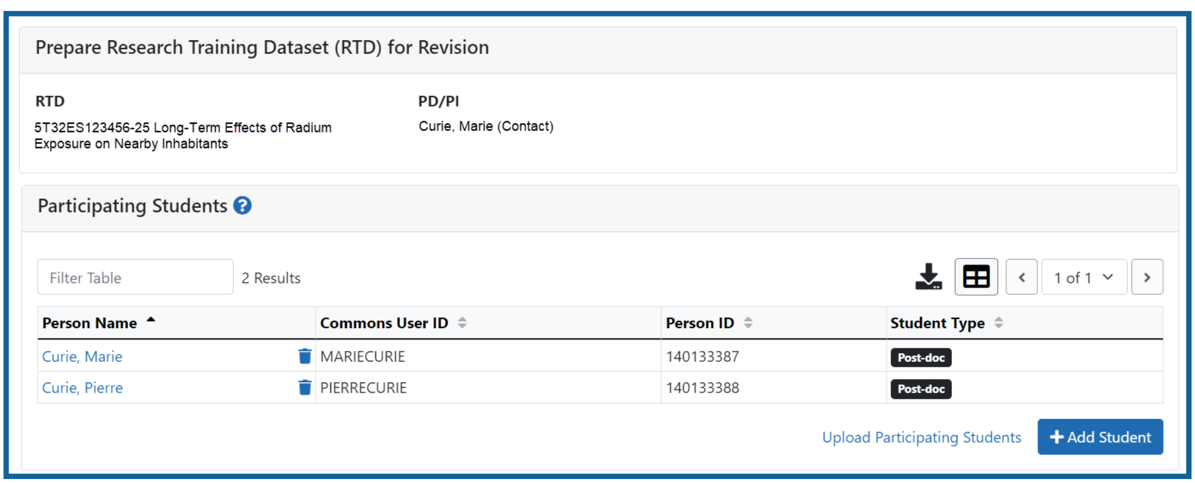


Figure 83: Students

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

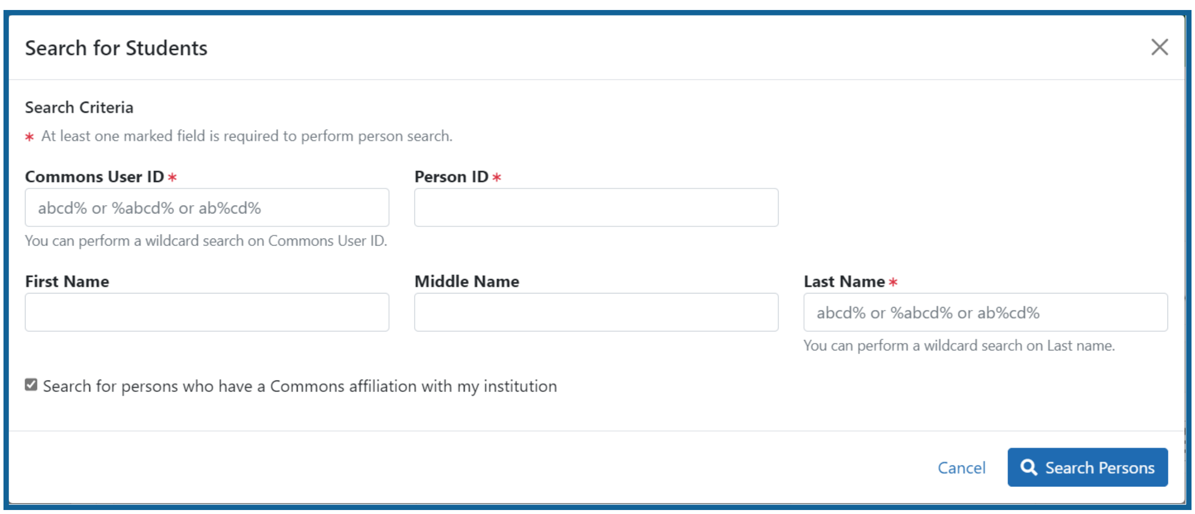
- **Student Name**
- **Commons User ID** (if available)
- **Person ID**
- **Student Type**: Pre-doc or Post-doc
- **Actions**
    - The **Edit** link opens the *Student Detail* for the selected trainee. Refer to the topic titled Refer to *Student Detail (Revision)* on page 212.
    - The **Remove** link 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.



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.

2. 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.

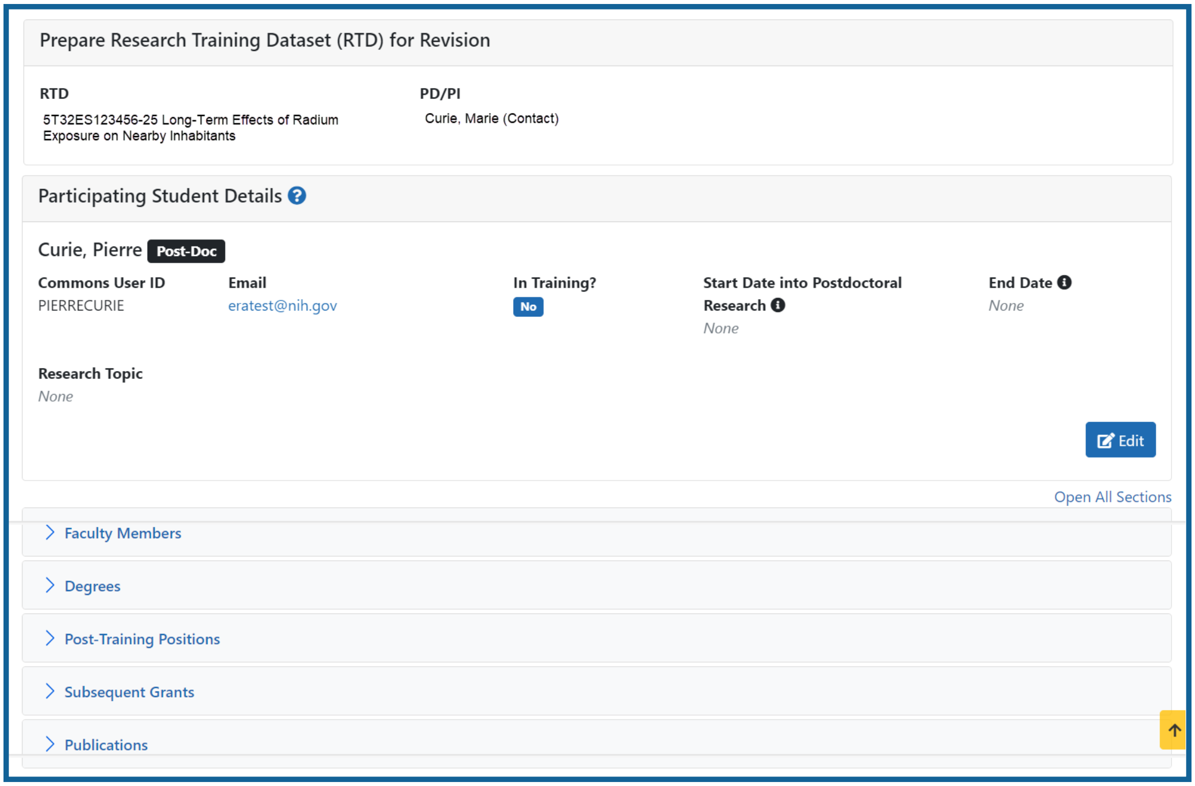
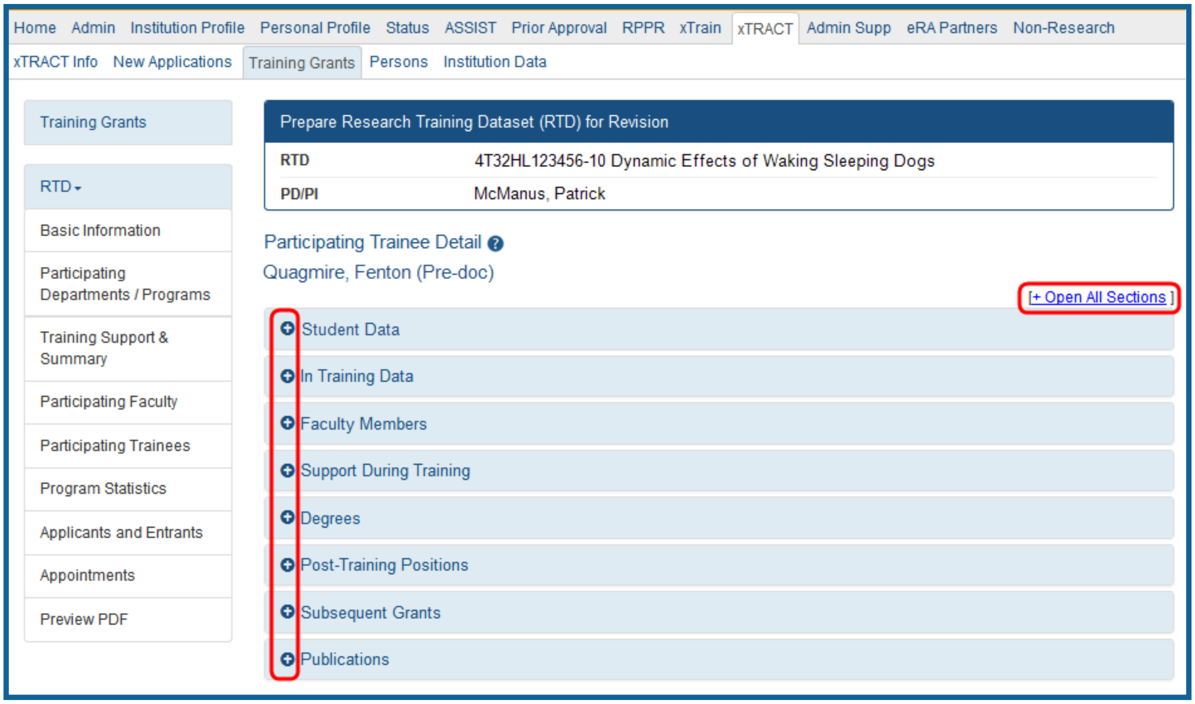


Figure 84: Student Detail (Revision)

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.



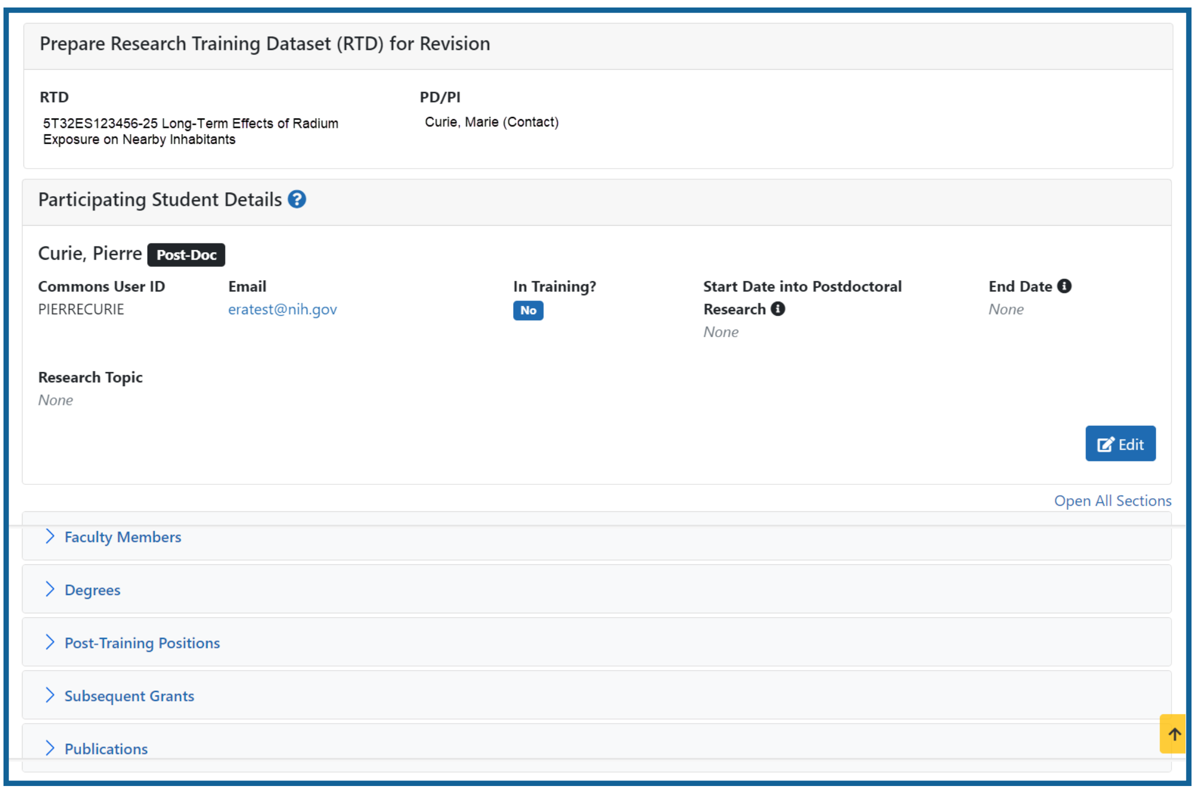


Figure 85: Participating Student Details

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:

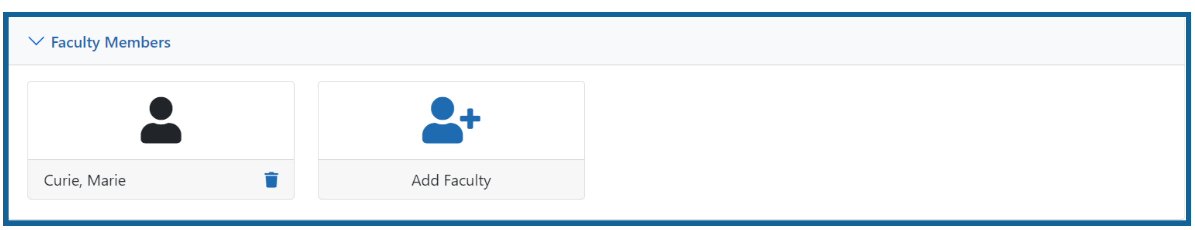
- Commons User ID or Person ID
- Email
- In Training?
- Start Date
- End Date
- Research Topic

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.



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.

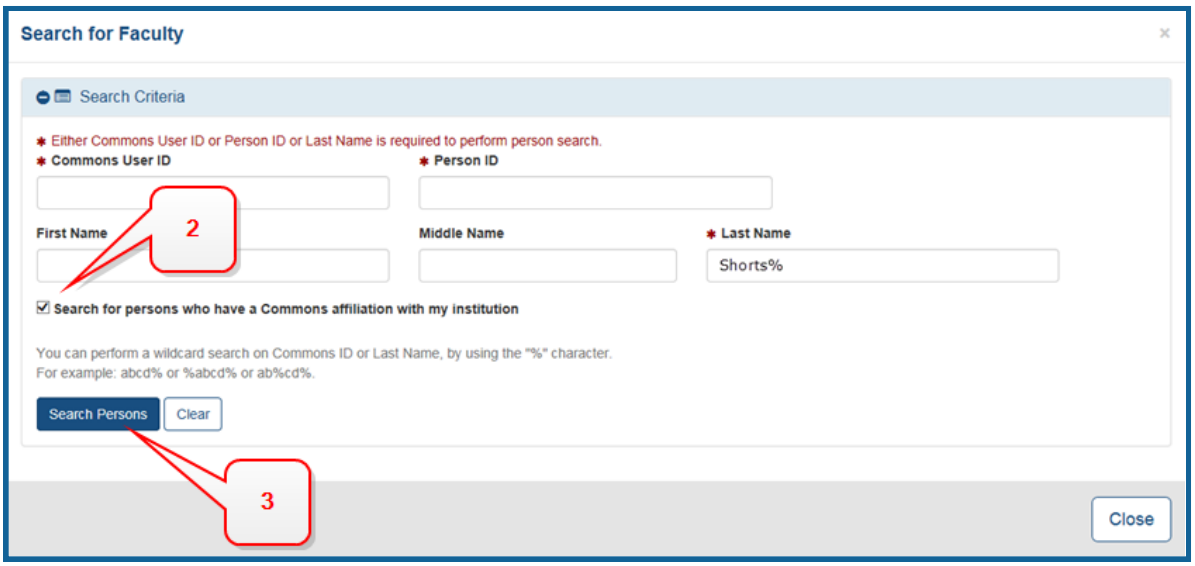


Figure 86: Search Faculty Member

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.

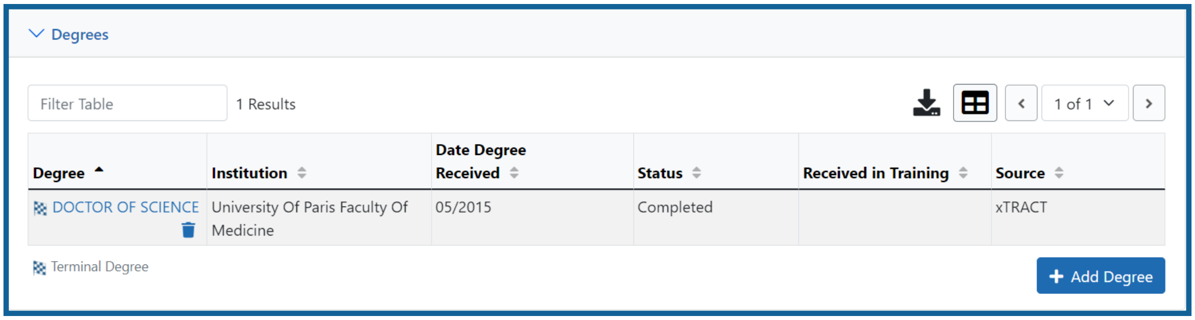
7. Search for and add other faculty as necessary, repeating the steps above.

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.



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:

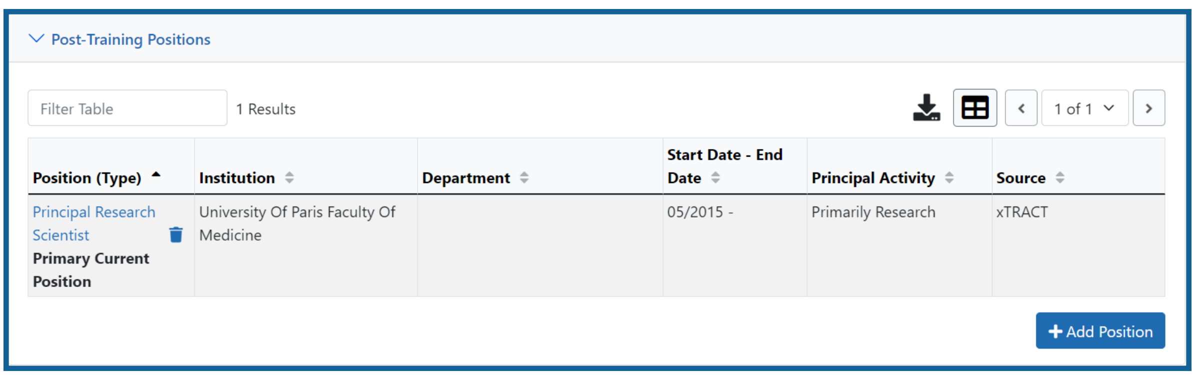
1. Select the **Add Degree** button.
2. Update the fields in the *Create a New Degree* pop-up:
   - **Degree**: Select from the list
   - **Other Degree Text**: Enter if Degree selected is *OTH (other type of degree)* or another category like BOTH, DDOT, DOTH, MDOT, MOTH, and VDOT.
   - **Degree Date**: 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 **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.



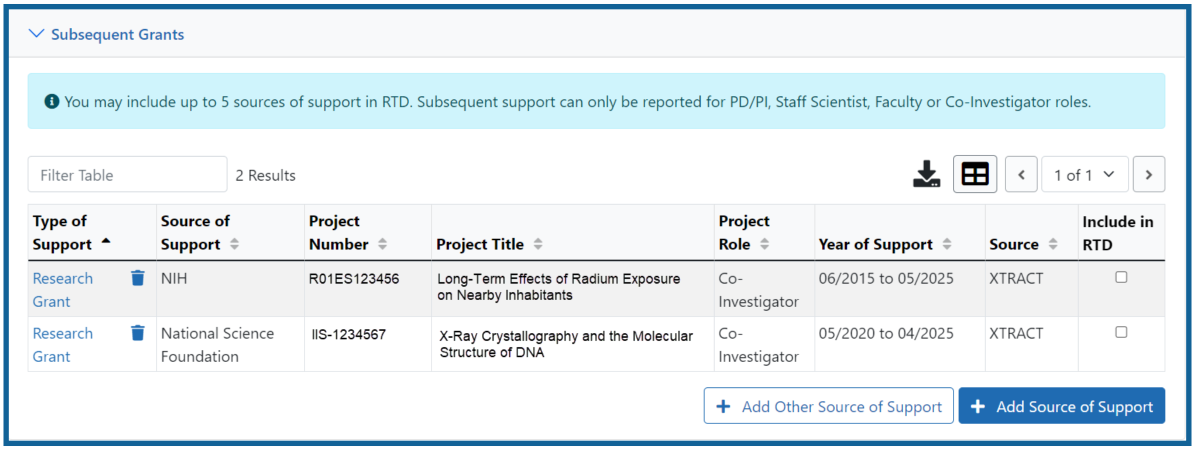
The **Source** of positions is displayed as *xTRACT* (meaning the position was added or updated for the person in xTRACT) or as *Commons Profile* (meaning the position is from the Commons Personal Profile of the person).

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.



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.

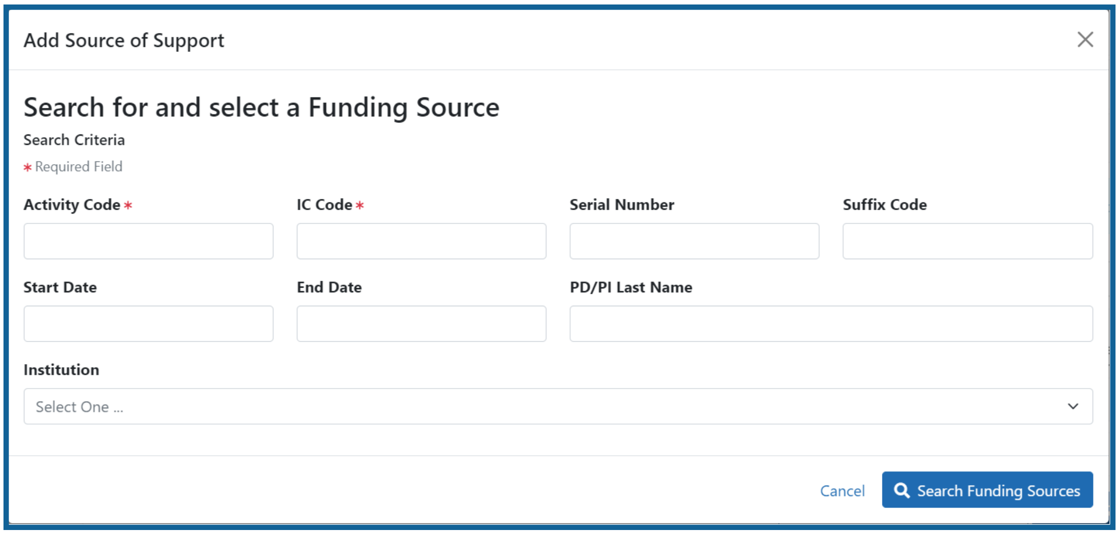
Add Other Source of Support button: Add sources of grant support received from non-NIH/Agency sources.

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.

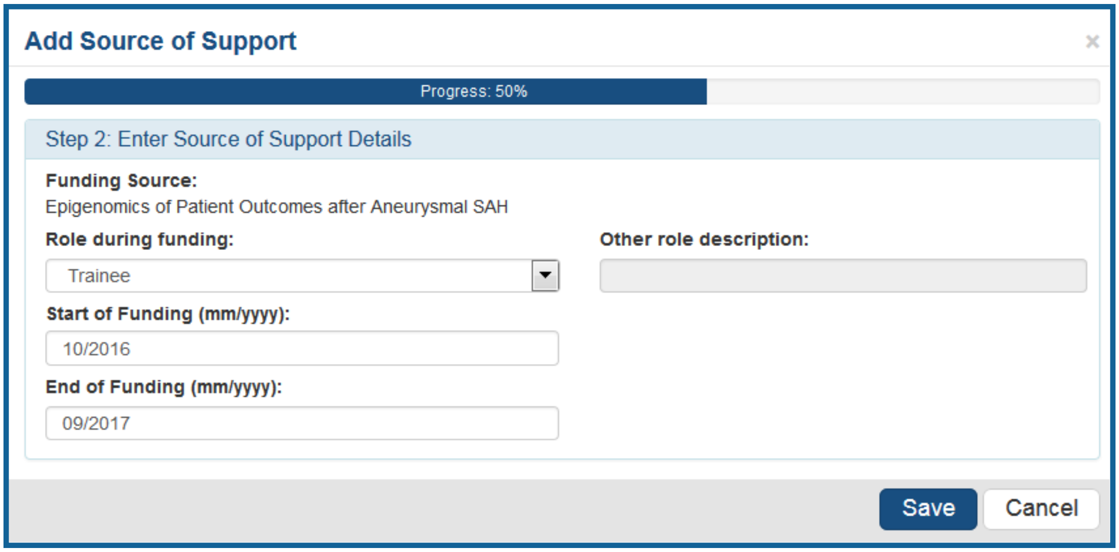
Sources of support that you include on the RTD must list the trainee/student in a project role such as PD/PI, co-investigator, faculty collaborator, or staff scientist. If you mark the checkbox of a record with a non-supported project role, an error will occur when you mark the checkbox, which states: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



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. 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.

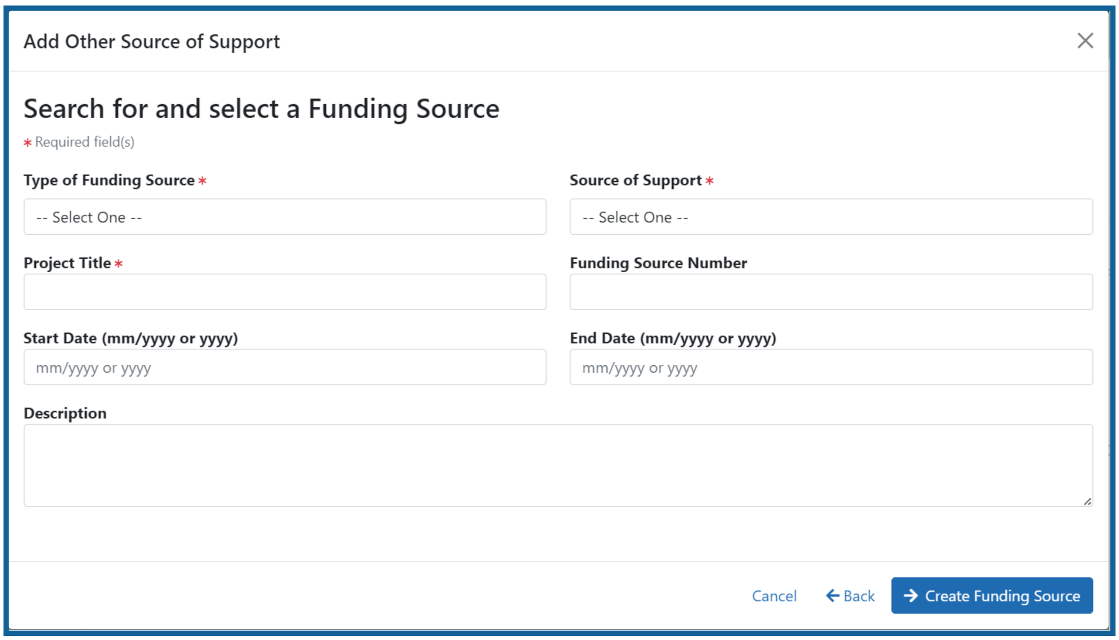


6. Click the **Save and Exit** button. Alternatively, if you want to add another funding source, click the **Save and Add Another Source of Support** button to be returned to the funding search popup.

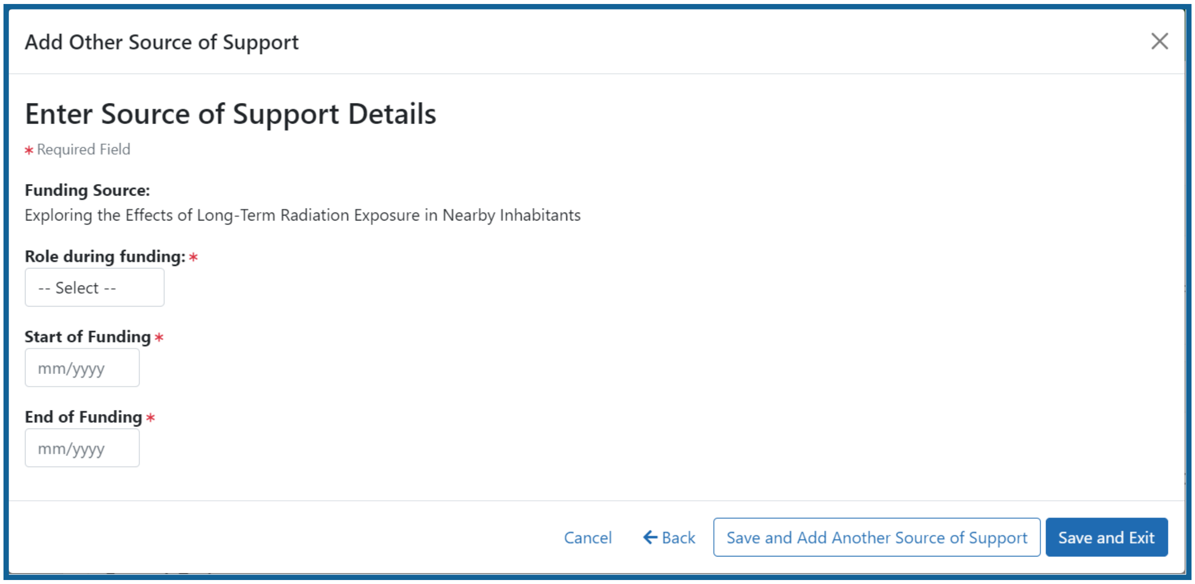
To add support from non-NIH/Agency sources of support:

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

5. Search for support by entering search criteria.
6. Click the **Search Funding Sources** button.
7. In the search results, click the **Select 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**.



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.



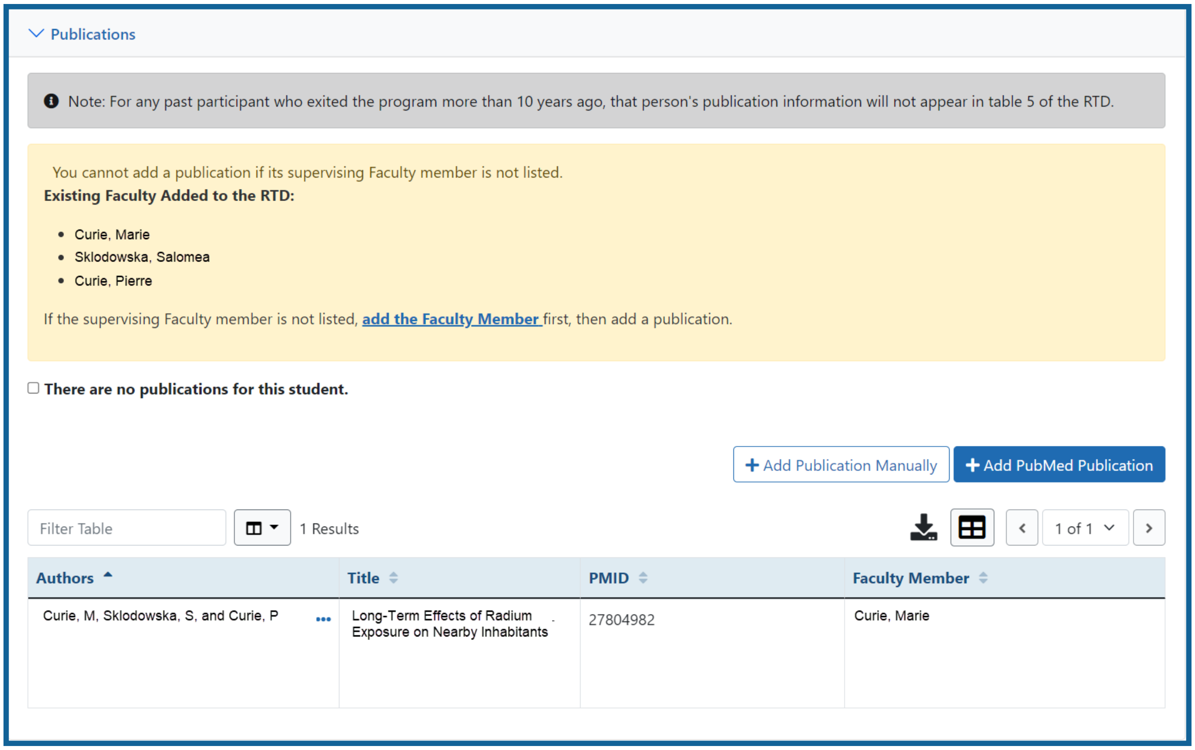
c. Select an option from the **Role during funding** dropdown.

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.



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:

1. 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**.
3. 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.

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.

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.
    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 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.

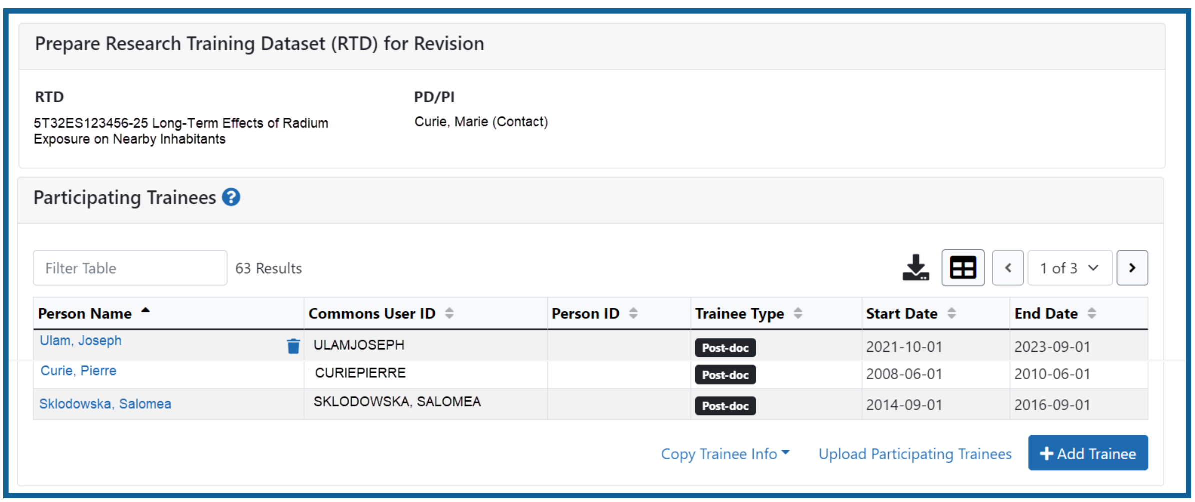


Figure 87: Participating Trainees

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.

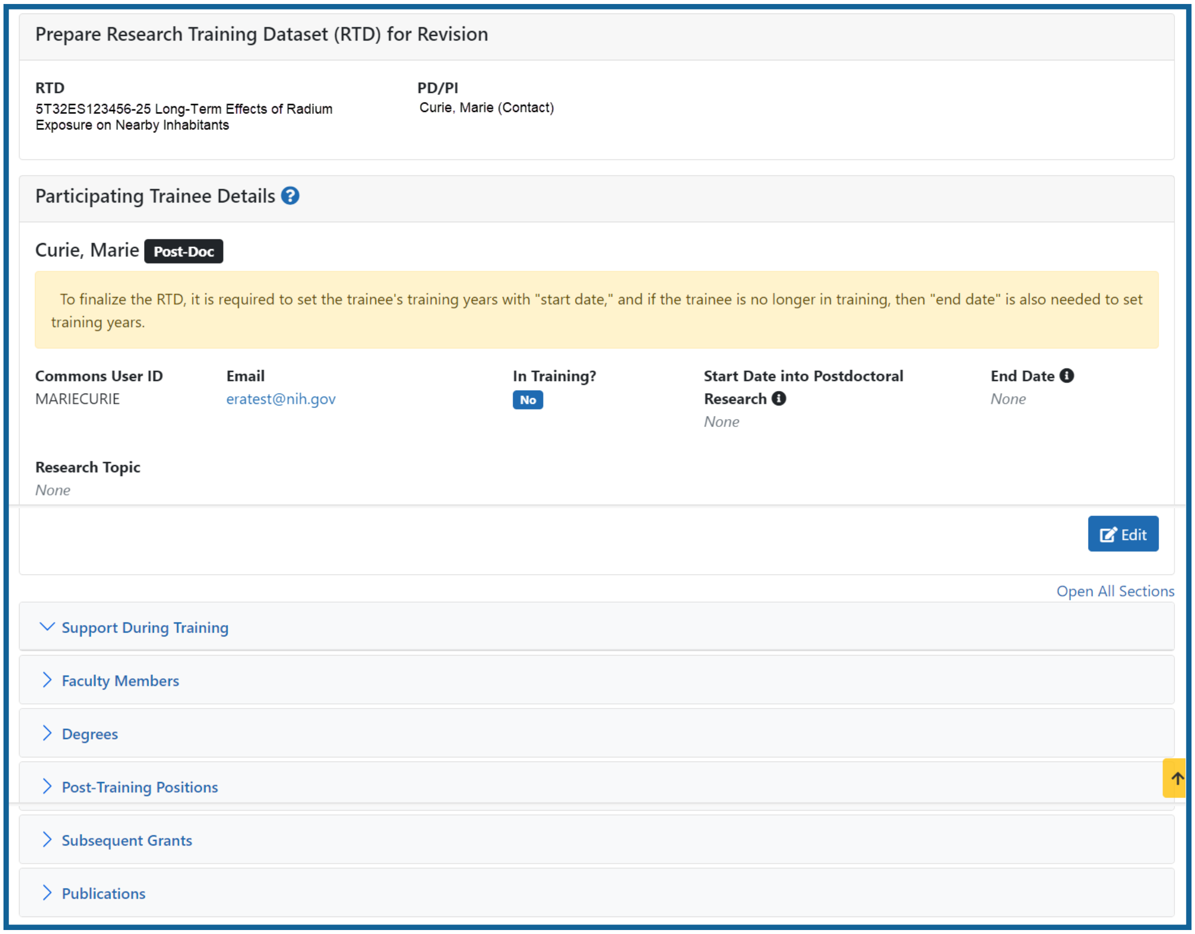


Figure 88: Participating Trainee Detail (Revision)

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 pop-up 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.
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.

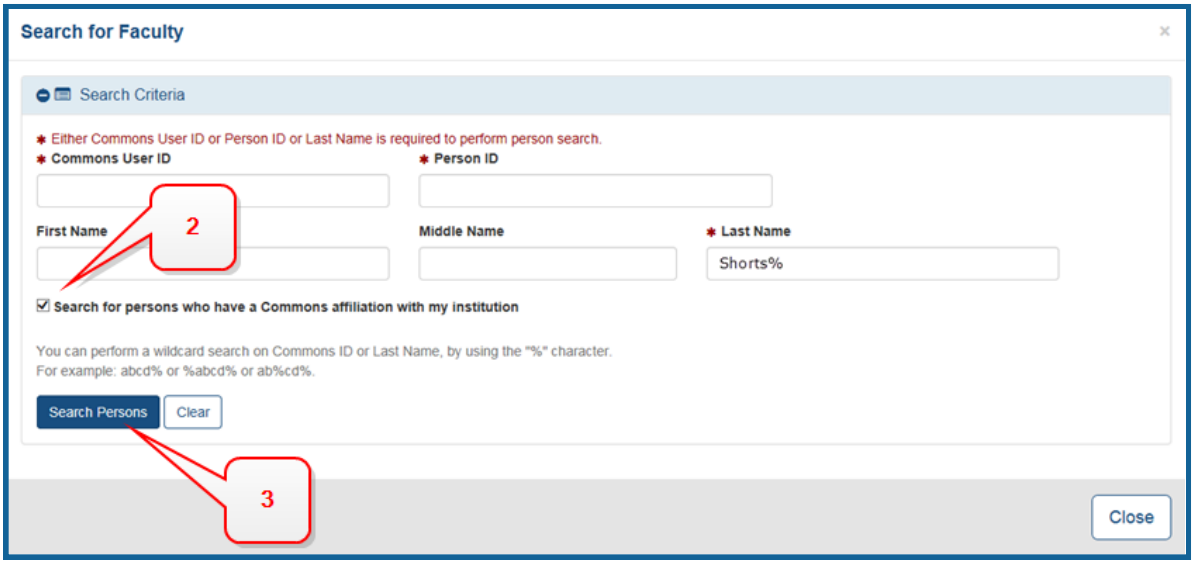


Figure 89: Search for Faculty

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 **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

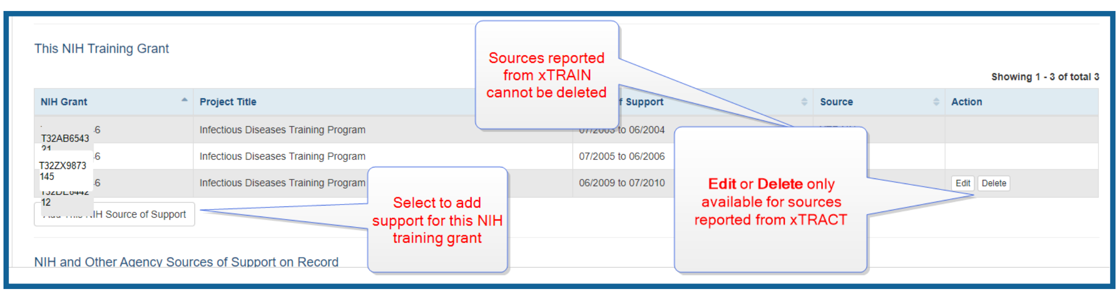
Includes the NIH Grant number , Project Title, Period of Support.

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.

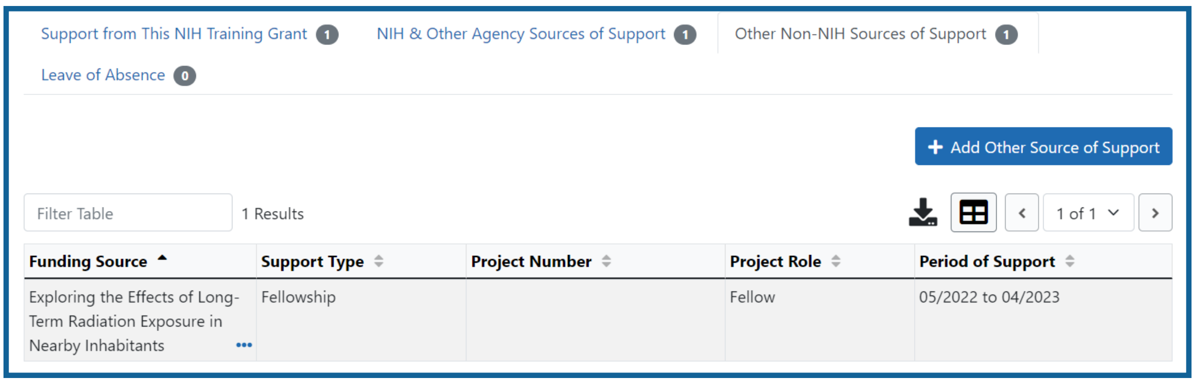


To add additional NIH or Other Agency support:

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 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.



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:

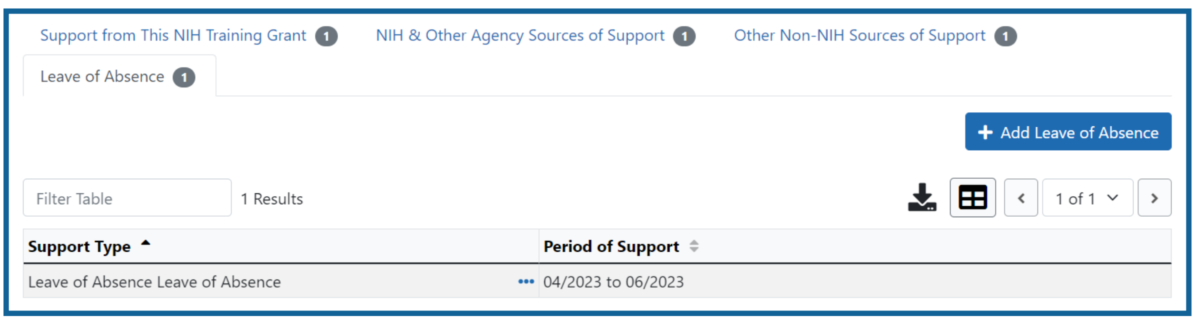
      - Enter search criteria in the fields and click the **Search Funding Sources** button.
      - Click the **Select this Funding Source** button for the correct project. The Enter Source of Support Details screen is displayed.
      - Select the trainee's role from the **Role during funding** drop-down. 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.



To add a Leave of Absence:

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

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.

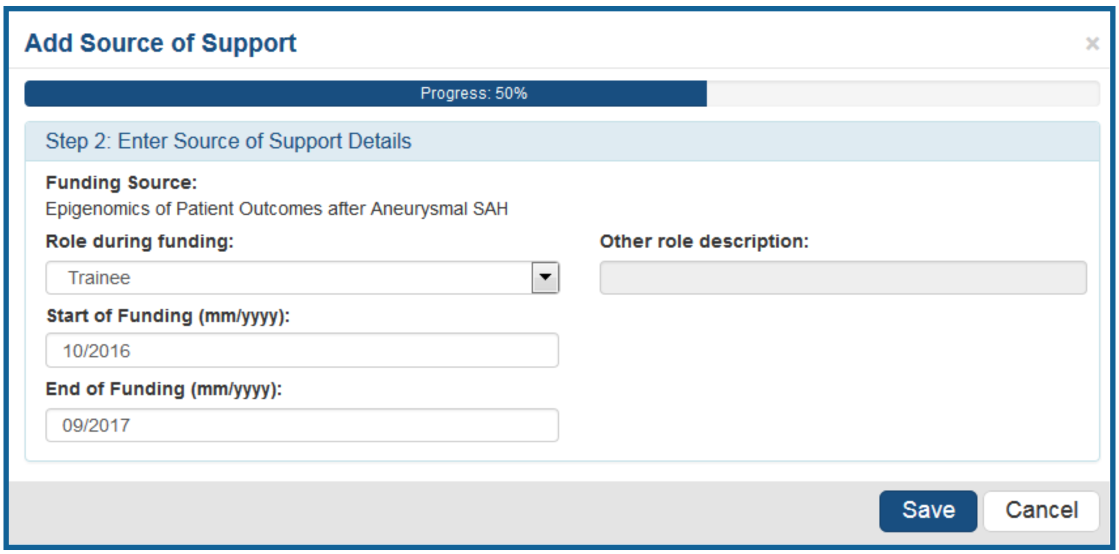
Add Other Source of Support button: Add sources of grant support received from non-NIH/Agency sources.

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:

1. 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.

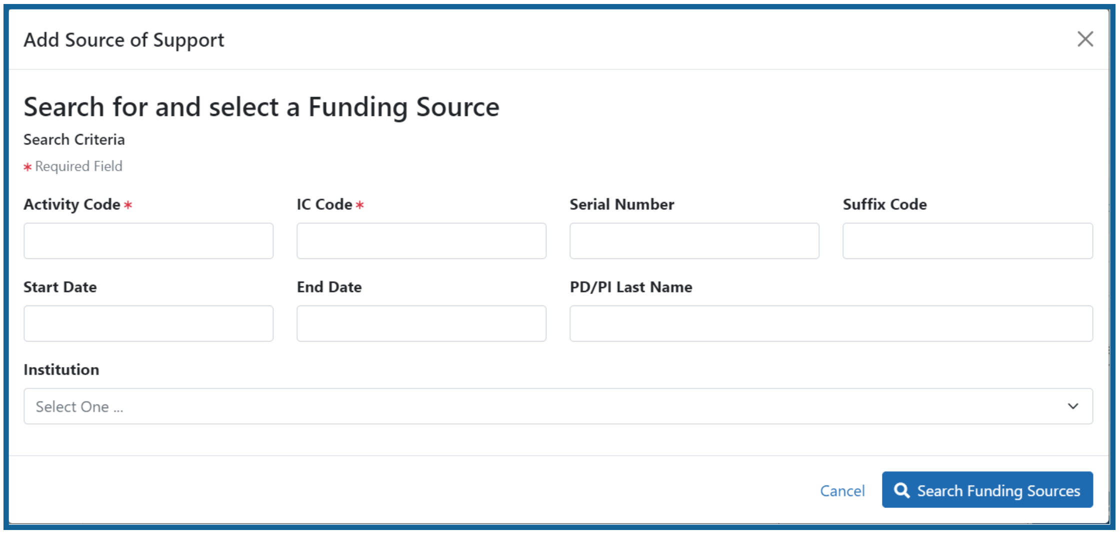


4. Click **Save and Exit**. Alternatively, if you want to add another funding source, click **Save and Add Another Source of Support** to be returned to the funding search popup.

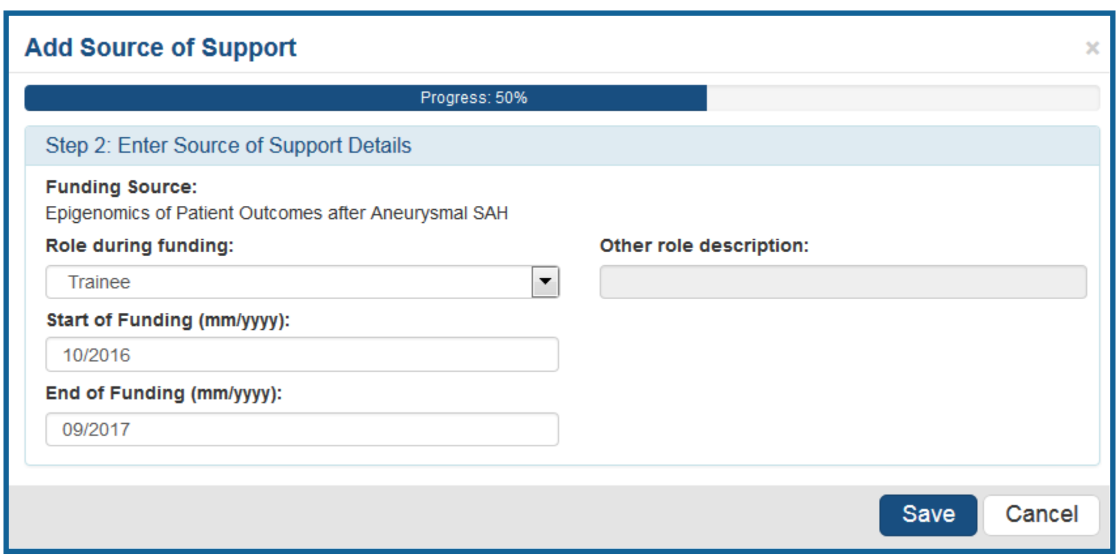
To add NIH or Agency support by indicating a generic activity code/IC:

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.



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.



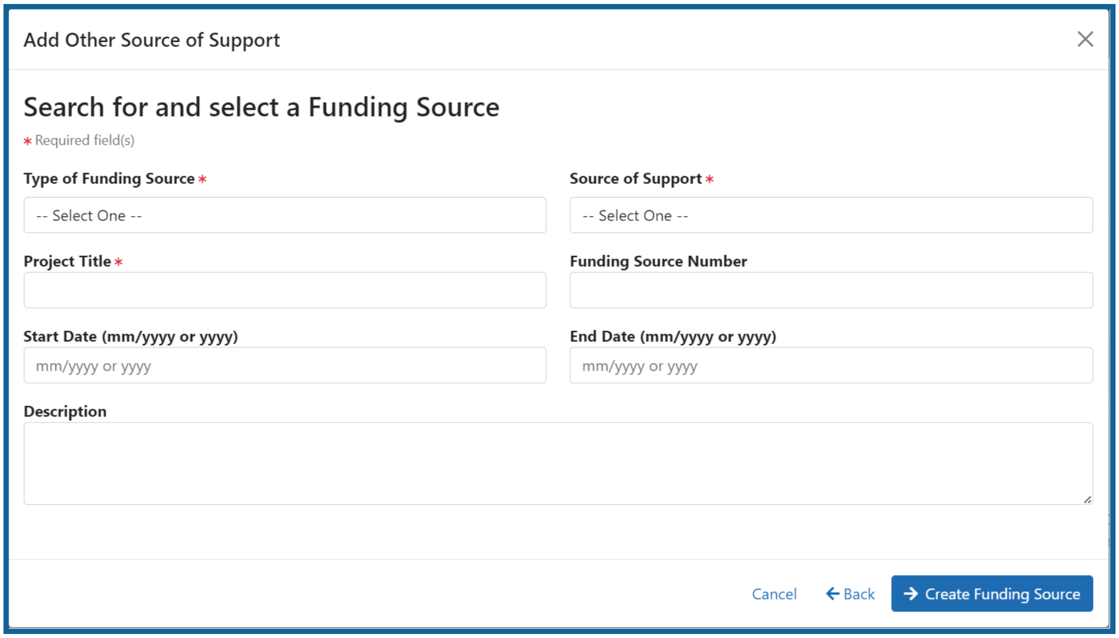
4. Click **Save and Exit**. Alternatively, if you want to add another funding source, click **Save and Add Another Source of Support** to be returned to the funding search popup.

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.

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.



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 peer-reviewed 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:

1. 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**.
3. 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.

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.

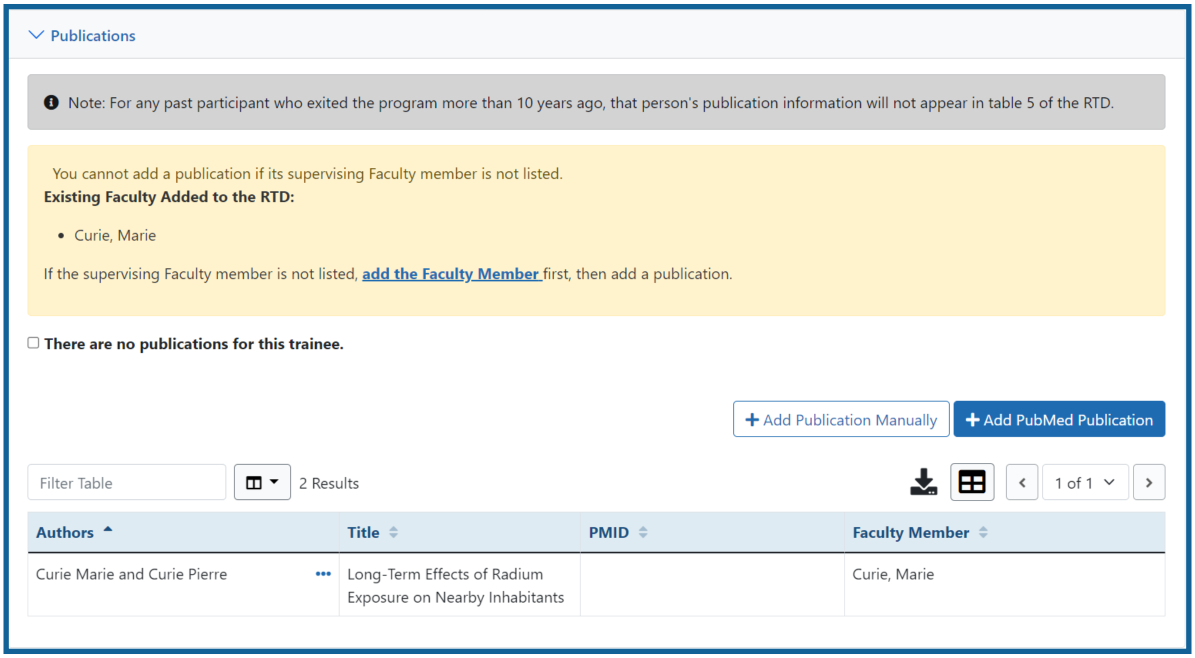
    b. You can enter multiple authors to compile a list of all authors of the publication. To add an author, enter the author's name in the **Authors** text box and click the **Add New Author** button.

    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.



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

Program Statistics (Revision)

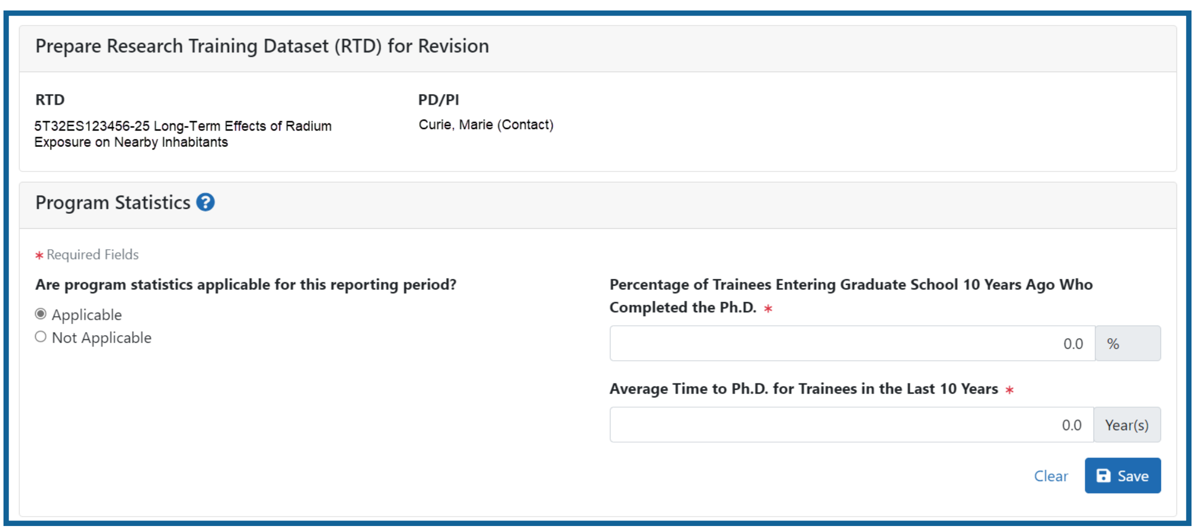


Figure 90: Program Statistics (Revision)

The **Program Statistics** section is only available for training grants that have Pre-doctorate 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).

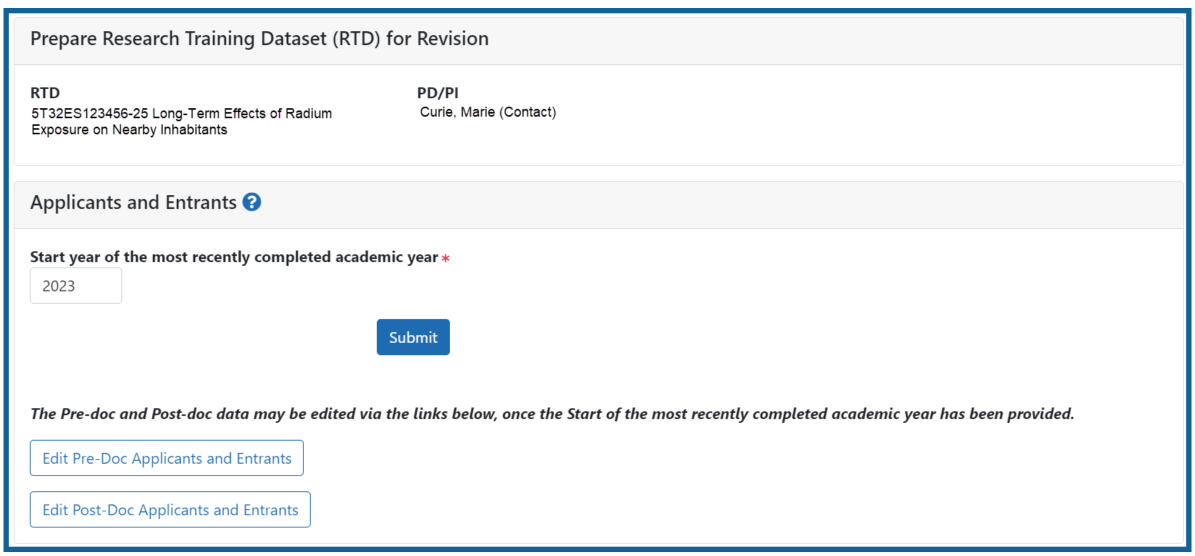


Figure 91: Applicants and Entrants

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.

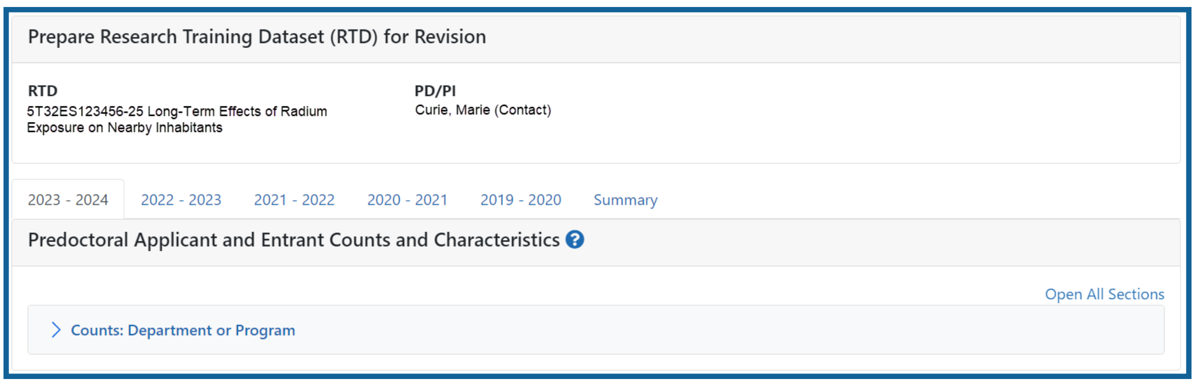


Figure 92: Predoctoral Applicant and Entrants Counts and Characteristics

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 (Revision)

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.

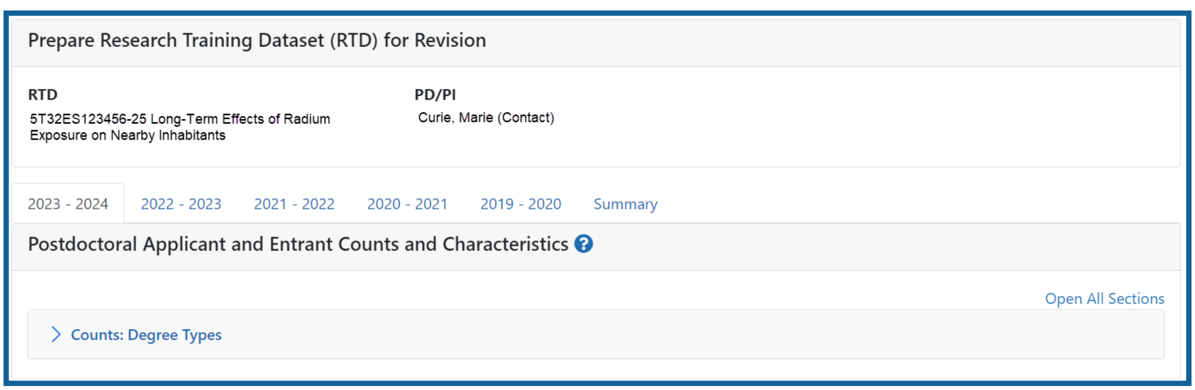


Figure 93: Postdoctoral Applicant and Entrants Counts and Characteristics

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.

Prepare Research Training Dataset (RTD) for Revision

RTD
5T32ES123456-25 Long-Term Effects of Radium Exposure on Nearby Inhabitants

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

Training Positions Appointed

	Budget Year 21	Budget Year 22	Budget Year 23	Budget Year 24	Sum of Budget Years
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

Edit Appointments | Refresh Appointments

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.

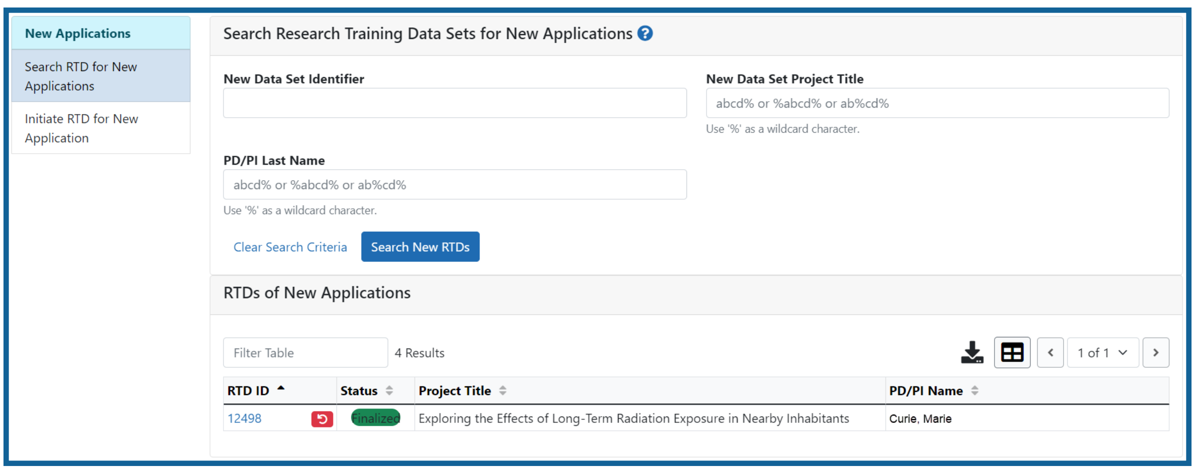
   A confirmation message warns: Are you sure you want to finalized this RTD? Once finalized, the RTD cannot be edited?

   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.



Click the hyperlinked RTD ID to view the PDF.

Click the  **Unfinalize 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.

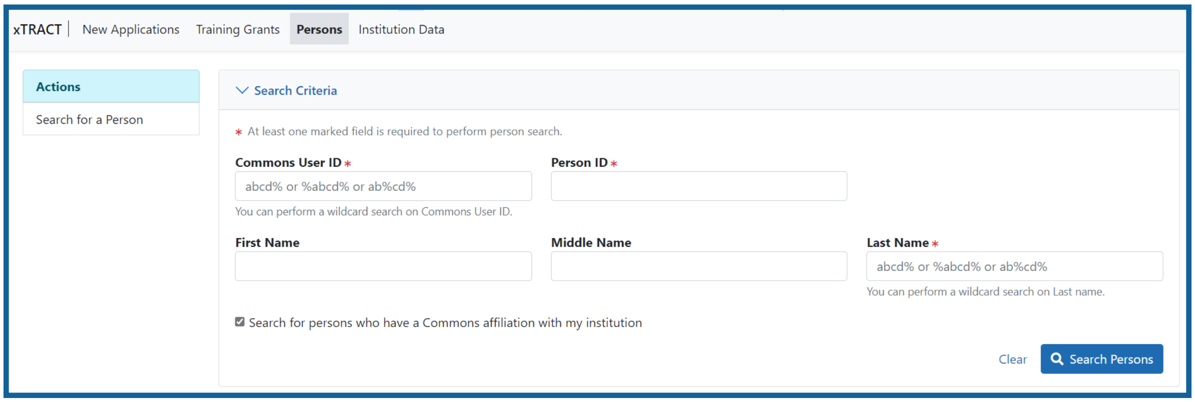


Figure 95: Search for Person(s)

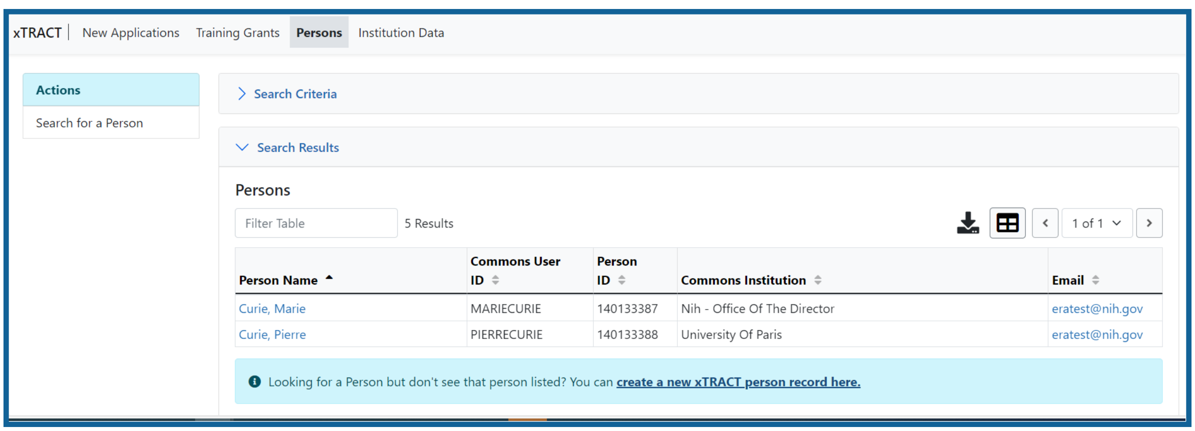


Figure 96: Search for Person(s) and Results

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.
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**

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.

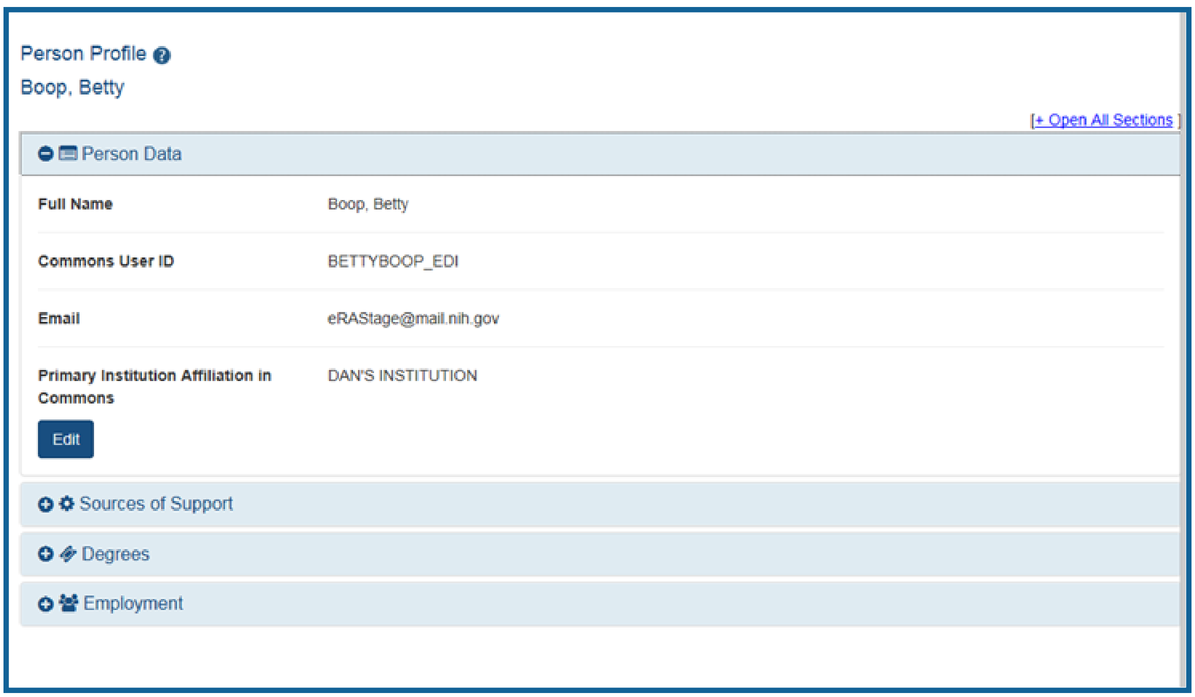


Figure 97: Sample xTRACT Person Profile

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

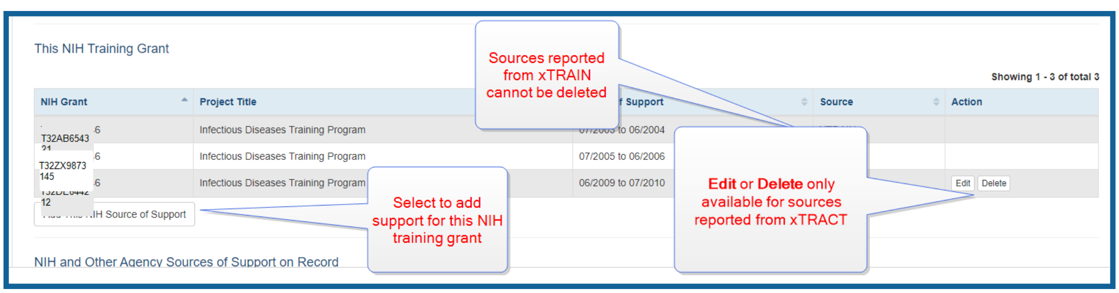
NOTE: This section applies to pre-doc and and post-doc trainees only.

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.

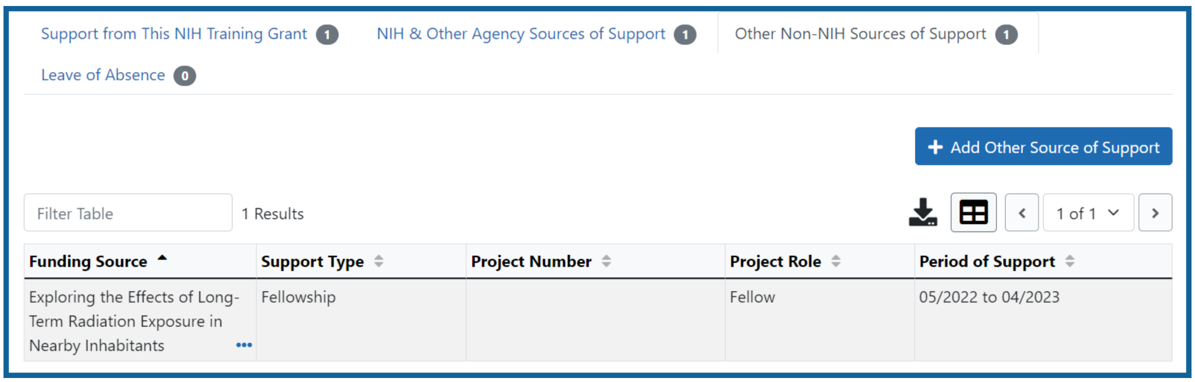


To add additional NIH or Other Agency support:

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 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.



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 **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.

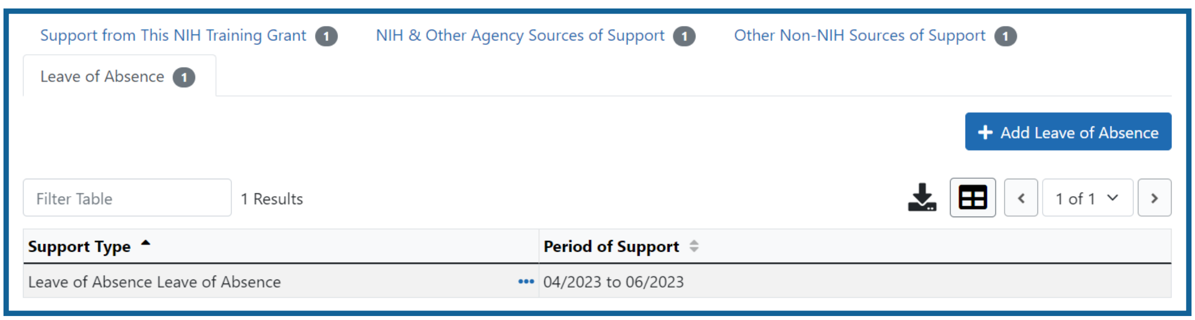
- Enter **Start of Funding** and **End of Funding** to indicate the dates of this person's involvement.
- Click the **Save and Exit** button.

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.



To add a Leave of Absence:

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

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 first perform a search 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.*

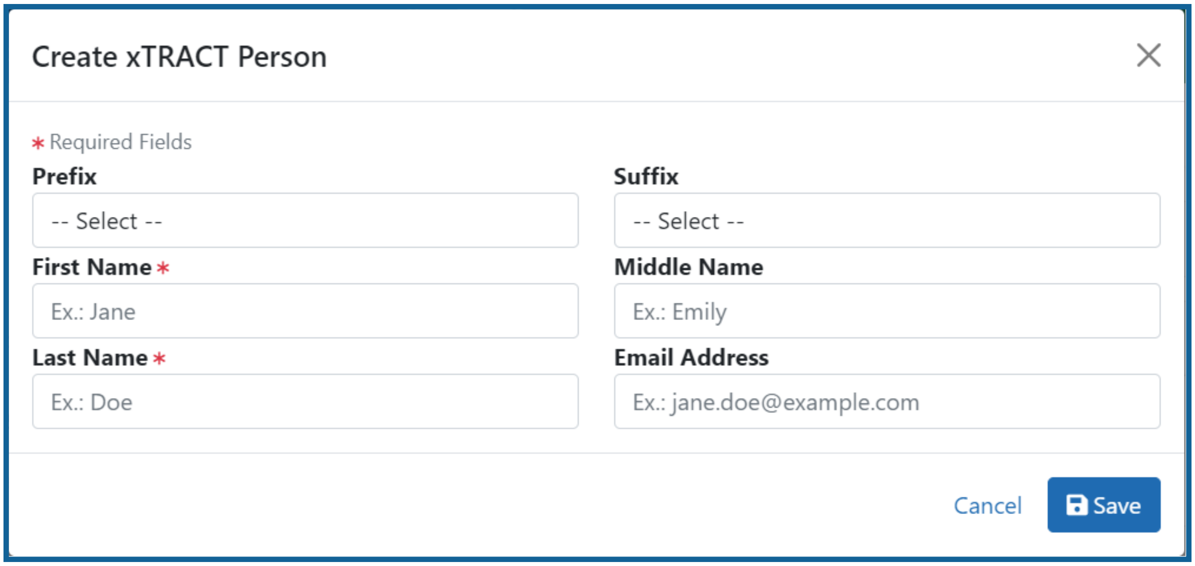


Figure 98: Create xTRACT Person

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
BA	BACHELOR OF ARTS
BOTH	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
JD	DOCTOR OF JURIS PRUDENCE
MA	MASTER OF ARTS

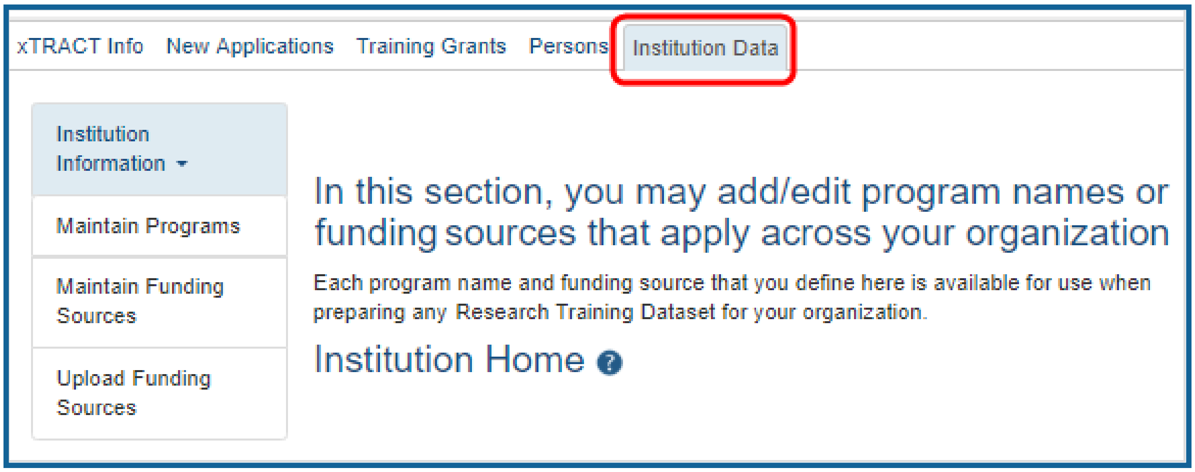
Abbreviation	Degree
MB	FOREIGN - BACHELOR OF MEDICINE
MBA	MASTER OF BUSINESS ADMINISTRATION
MBBS	FOREIGN - BACHELOR OF MEDICINE AND SURGERY
MD	DOCTOR OF MEDICINE
MDOT	OTHER DOCTOR OF MEDICINE
MLS	MASTER OF LIBRARY SCIENCE
MOTH	OTHER MASTERS
MPA	MASTER OF PUBLIC ADMINISTRATION
MPH	MASTER OF PUBLIC HEALTH
MS	MASTER OF SCIENCE
MSN	MASTER OF SCIENCE IN NURSING
ND	DOCTOR OF NATUROPATHY
OD	DOCTOR OF OPTOMETRY
OTH	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**.

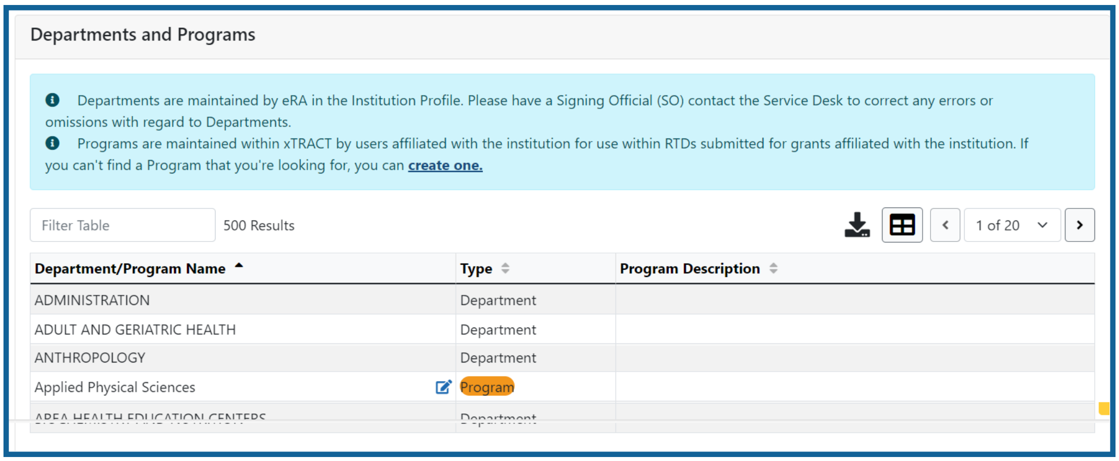


Figure 99: Departments and Programs at an Institution

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.

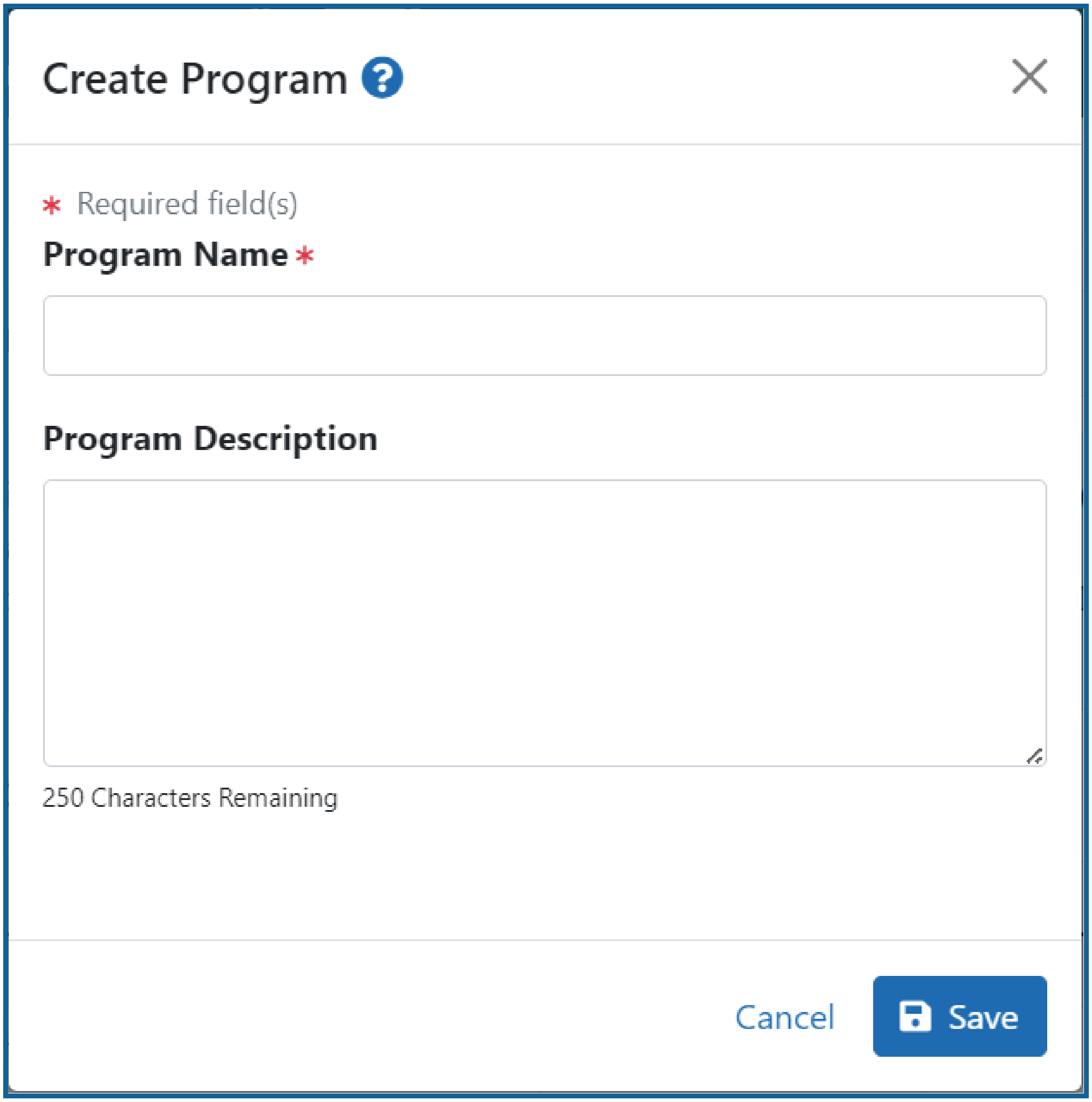


Figure 100: Create Program Screen

1. Enter the **Program Name**. This field is required and has a limit of 60 characters.
2. *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 [searching for the program](#).

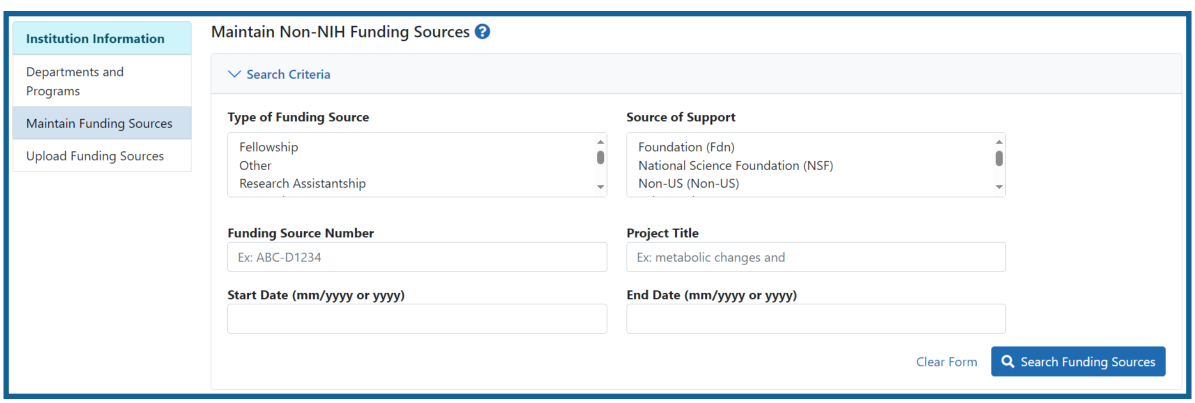
1. Update the name of the program in the **Program Name** field and/or the description of the program in the **Program Description** field as necessary.
2. Select the **Save** button to save the changes.

   *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 *Maintain Non-NIH Finding Sources* screen.



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.

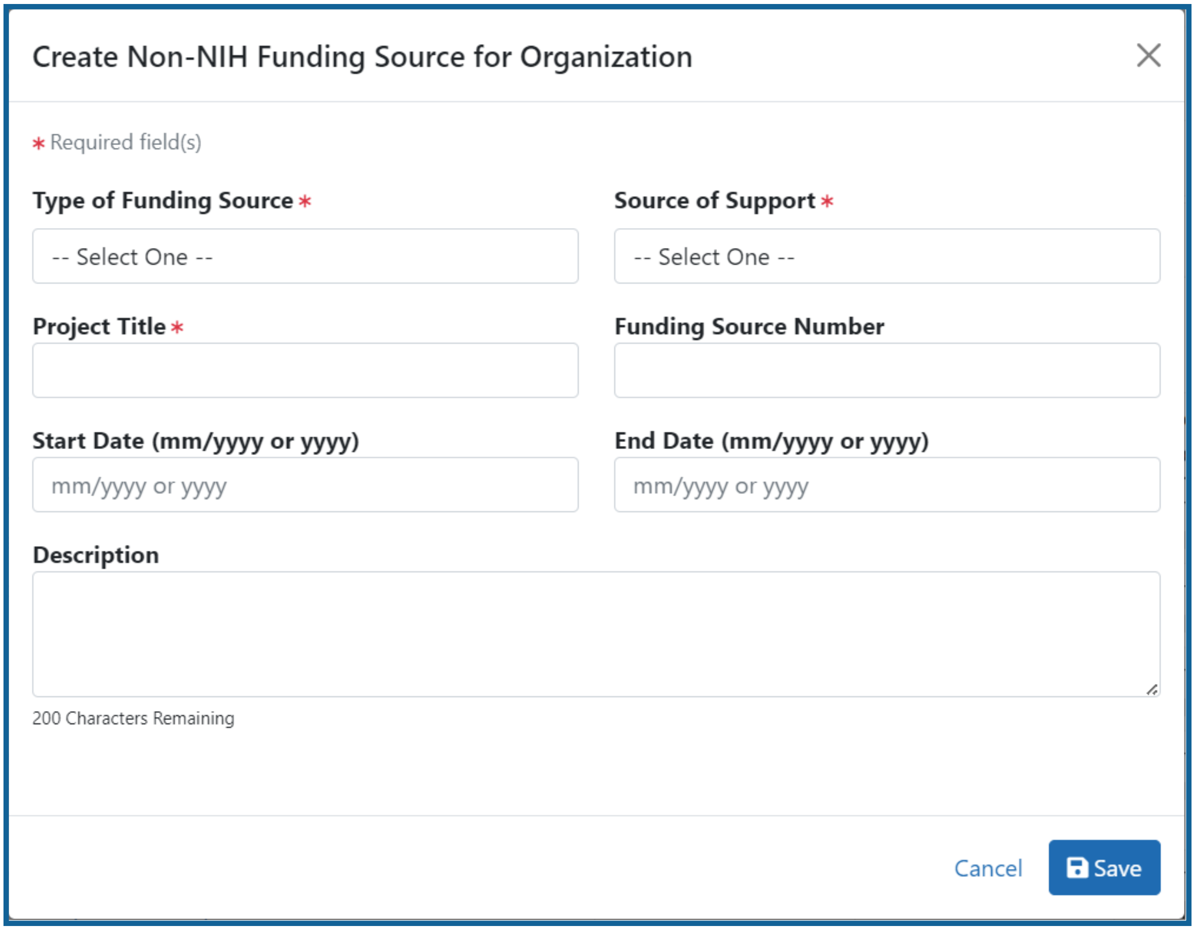
   You can use the **Clear** button to remove the entered search criteria and start over.

   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 Edit Funding Source or Create Funding Source 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.



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.

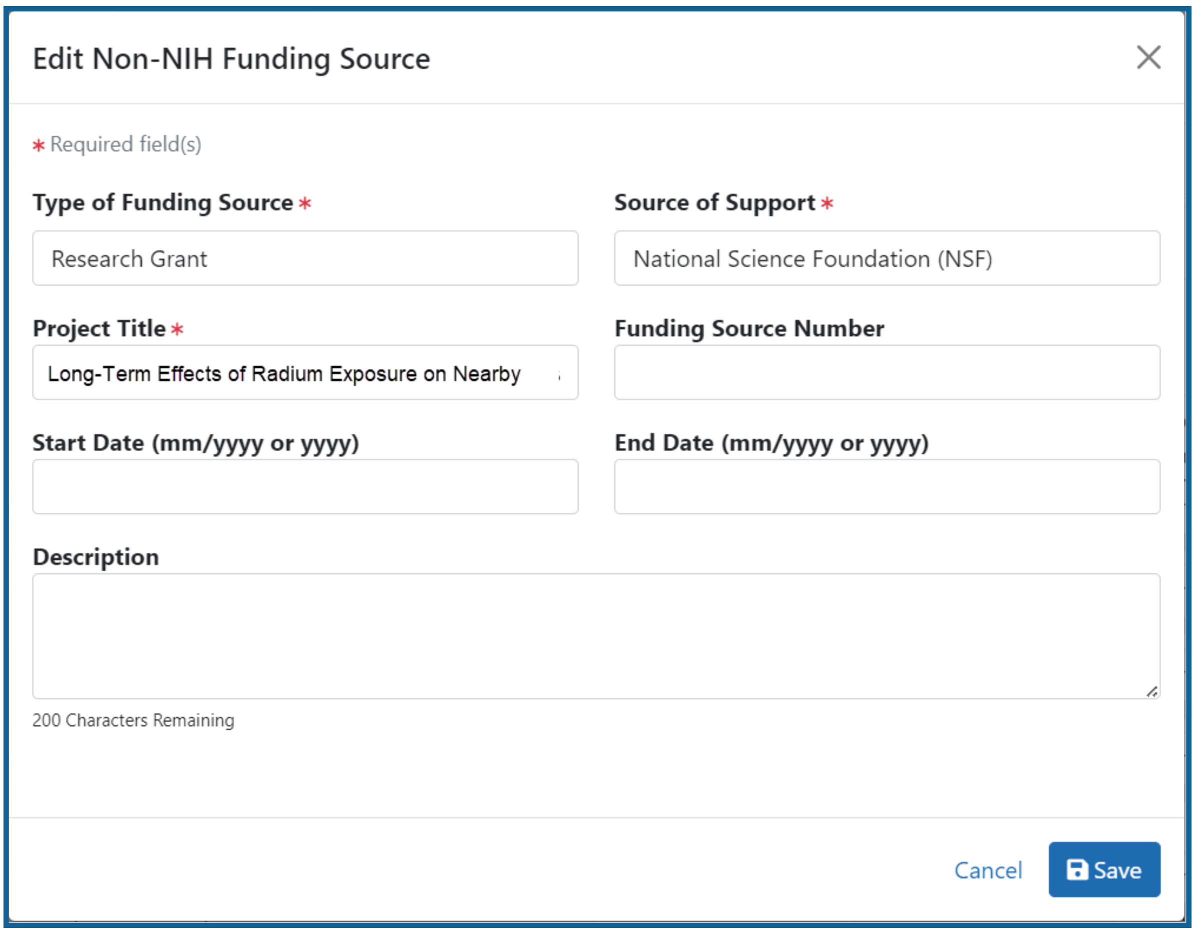
2. Select the **Save** button to save the information.

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 searching for the funding source.



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.

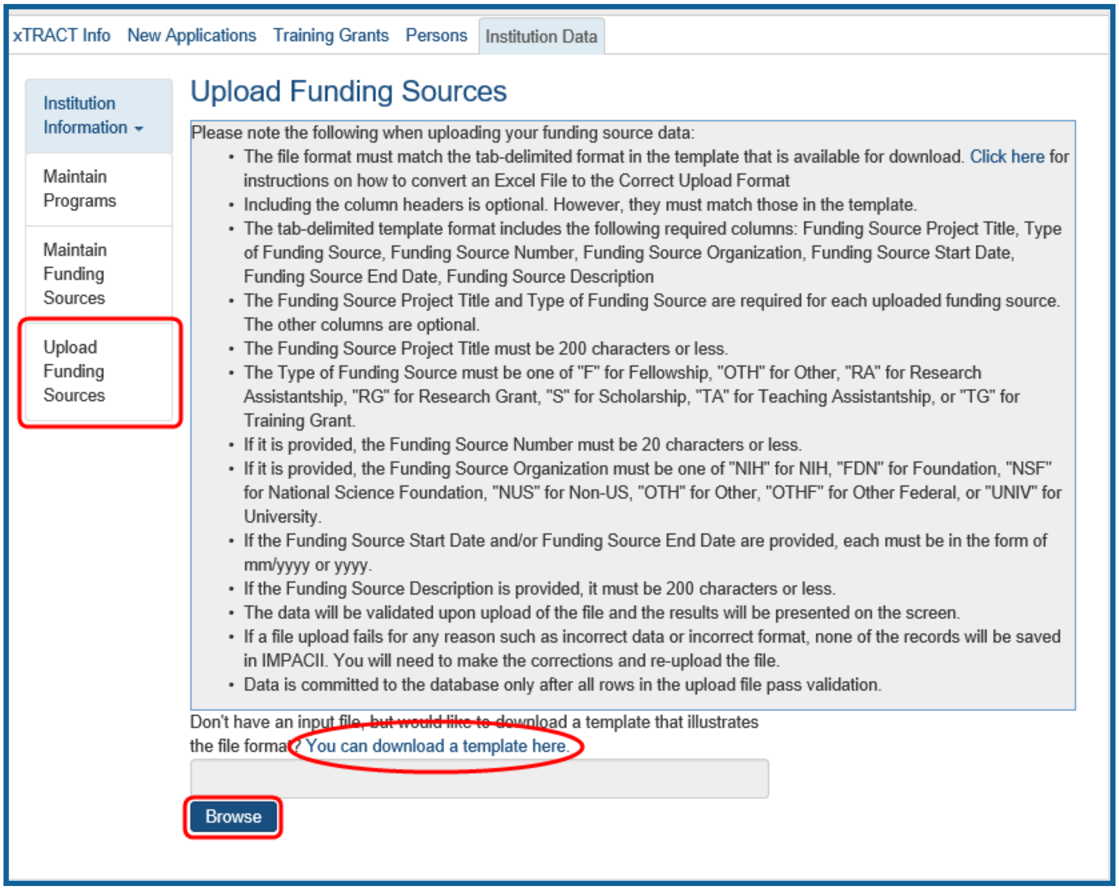


Figure 101: Upload Funding Sources

1. 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 [the Data Tables page](https://grants.nih.gov/grants-process/write-application/forms-directory/data-tables) 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 Interdepartmental Programs

This section explains what parts of the xTRACT module fill Table 1 of the resulting PDF-formatted 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: https://grants.nih.gov/grants-process/write-application/forms-directory/data-tables

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.

Sample Table 1. Census of Participating Departments and Interdepartmental Programs

Part I. Predoctorates

Participating Department or Program	Total Faculty	Participating Faculty	Total Predoctorates	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. Postdoctorates

Participating Department or Program	Total Faculty	Participating Faculty	Total Post-doctorates	Total Postdoctorates Supported by any HHS Training Award	Total Postdoctorates with Participating Faculty	Eligible Postdoctorates with Participating Faculty	TGE Postdoctorates Supported by this Training Grant (Renewals/ Revisions)	Postdoctorates 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 Pharmacology	25	5	15	8	5	3	2	0
Total	**102**	**39**	**66**	**38**	**26**	**13**	**7**	**1**

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 Introduction to Data Tables document for specific information.

When working on an RTD, click on *Participating Departments/Programs* from the left menu.

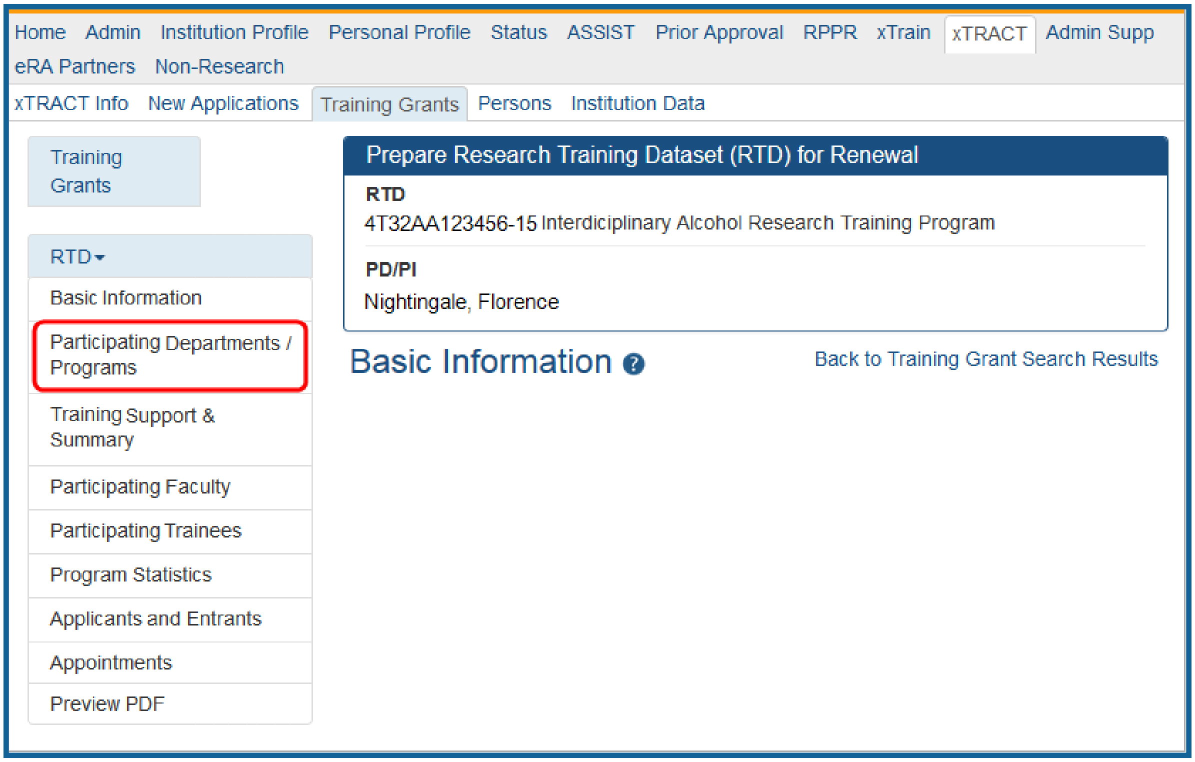


Figure 103: Participating Departments/Programs section of RTD

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 three-dot 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.

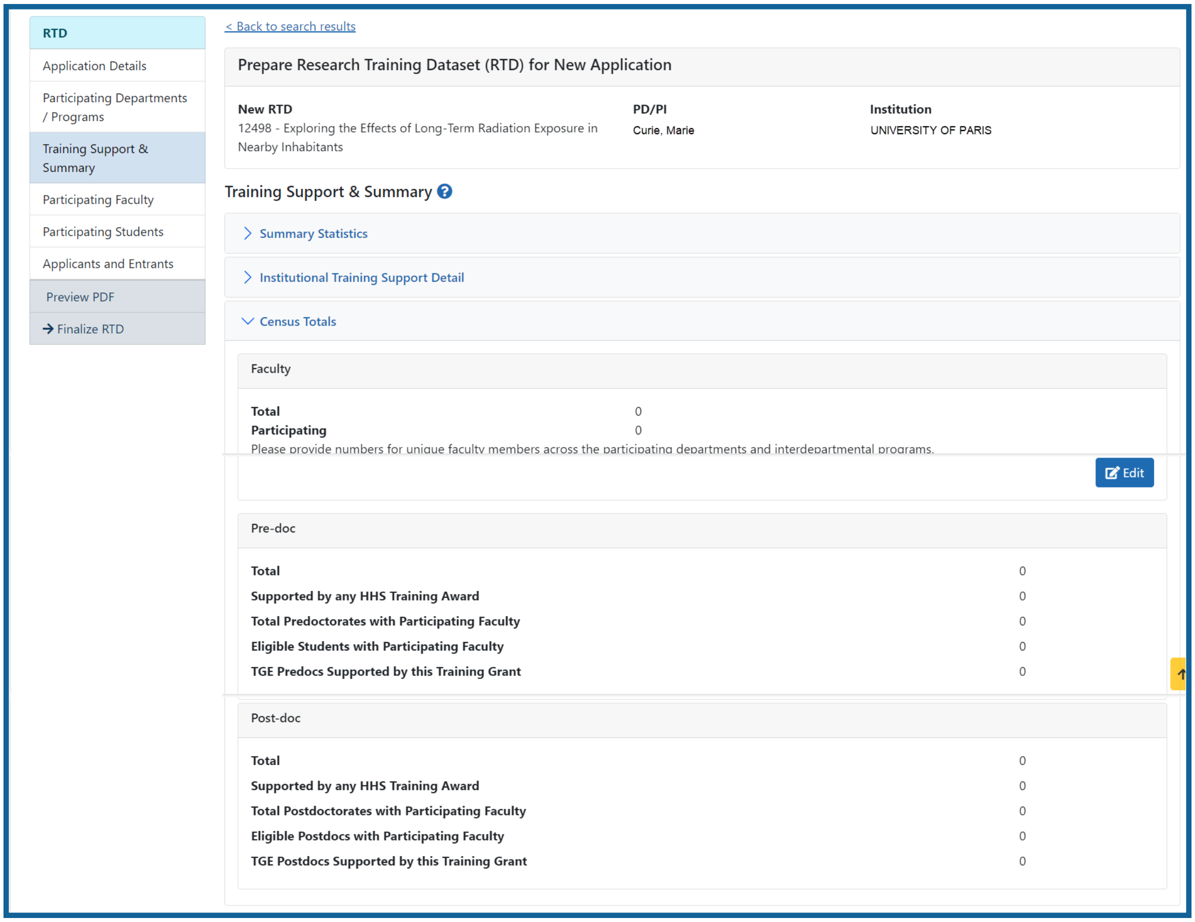


Figure 104: Faculty section of Training Support & Summary section

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.

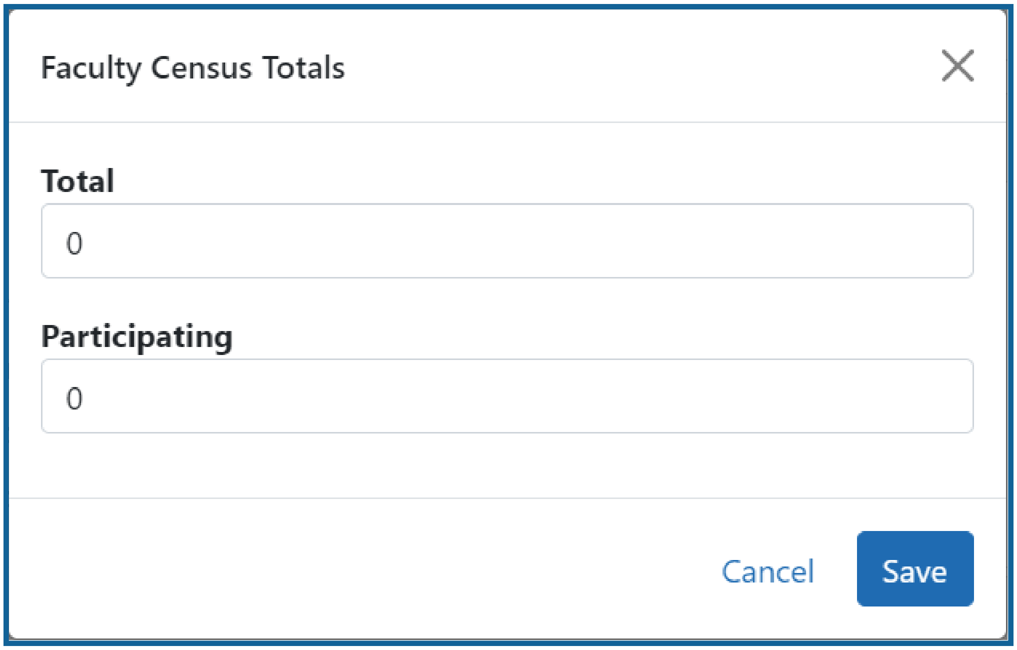


Figure 105: Faculty Census Totals window

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.

Sample Table 1. Census of Participating Departments or Interdepartmental Programs

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: https://grants.nih.gov/grants-process/write-application/forms-directory/data-tables

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.

Sample Table 2. Participating Faculty Members

Part I. Participating Faculty Members at Applicant Organization

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	Postdoctorates 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
Ibrahim, Parker	DrPH	Prof.	Population Health	Molecular Basis of Health Disparities	Preceptor	5	8	8	4	4	4

Part II. Participating Faculty Members at Partner Organizations (Partnership Programs)

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	Postdoctorates Continued in Research or Related Careers
Smith, Quinn A.	PhD	Asst. Prof.	Partnership University (Bioengineering)	Medical Devices for Disease Detection	Preceptor	2	3	3	2	1	1
Johnson, River J.	PhD	Res. Asst. Prof.	Partnership University (Neuroscience)	Neuro-immunology	Preceptor	2	2	2	5	3	2
Rodriguez, Leticia M.	MD, PhD	Assoc. Prof.	Partnership University (Population Science)	Chronic Disease Prevention and Control	Preceptor	5	7	6	5	9	7
Wilson, Jordan T.	PhD	Prof.	Partnership University (Gerontology)	Aging and Physical Activity	PD/PI	6	9	8	4	7	5

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*.

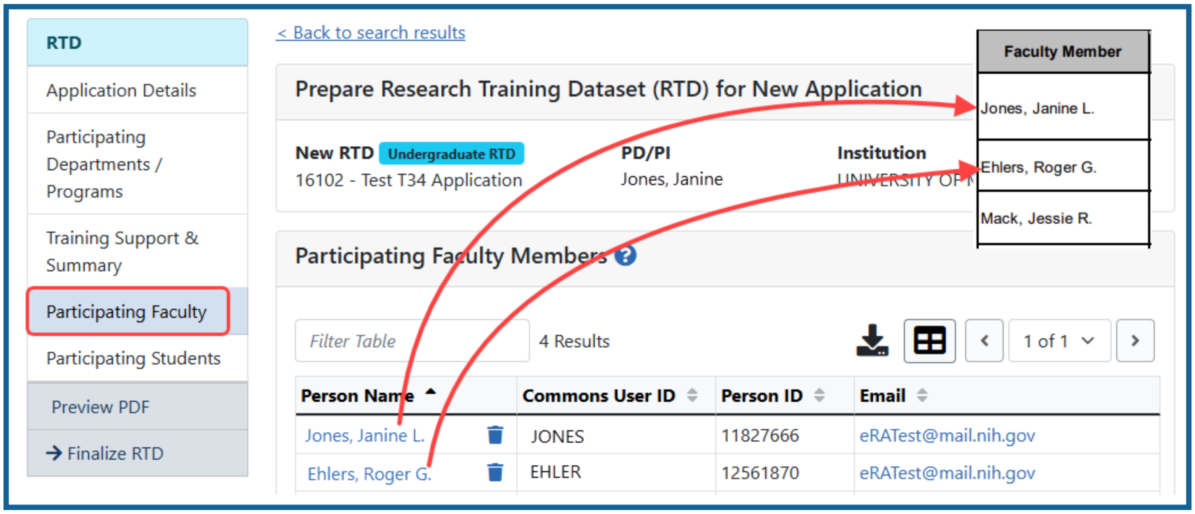


Figure 108: The Participating Faculty data populates Table 2.

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.

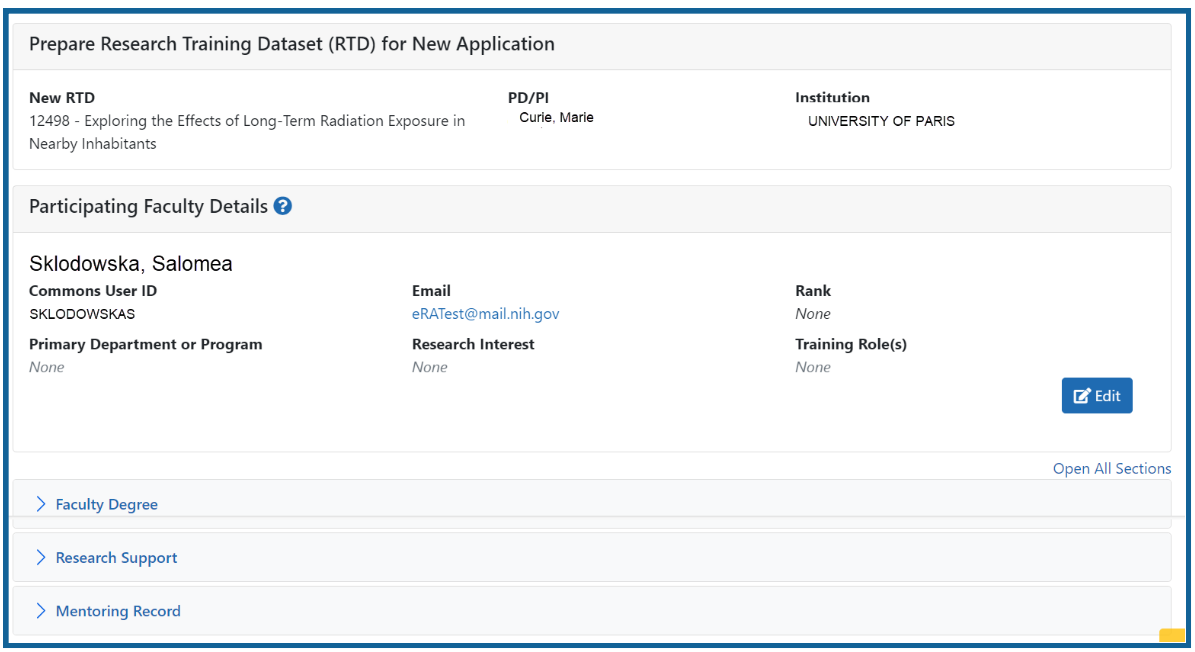


Figure 109: Participating Faculty Details screen

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 Pre-doctoral or Postdoctoral, so column headings and other labels that refer to participants list "Undergraduates" instead of Postdoc/Predoc. Also, columns listing "degree" are omitted.

Sample Table 2. Participating Faculty Members

Part I. Participating Faculty Members at Applicant Organization

Name	Degree(s)	Rank	Primary Department or Program	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	Regulation of Synthesis of Biogenic Amines	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

Sample Table 2. Participating Faculty Members

Part II. Participating Faculty Members at Other Organizations (Partnership Programs)

Name	Degree(s)	Rank	Organization (Department)	Research Interest	Training Role	Undergraduates In Training	Undergraduates Graduated	Undergraduates 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 and Related 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: https://grants.nih.gov/grants-process/write-application/forms-directory/data-tables

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.

Table 3. Federal Institutional Research Training Grant and Related Support Available to Participating Faculty Members

Grant Title	Award Number	Project Period	PD/PI	Number of Positions			Number of Participating Faculty (Number Overlapping)	Names of Overlapping Faculty
				Predoctoral	Postdoctoral	Shortterm		
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.

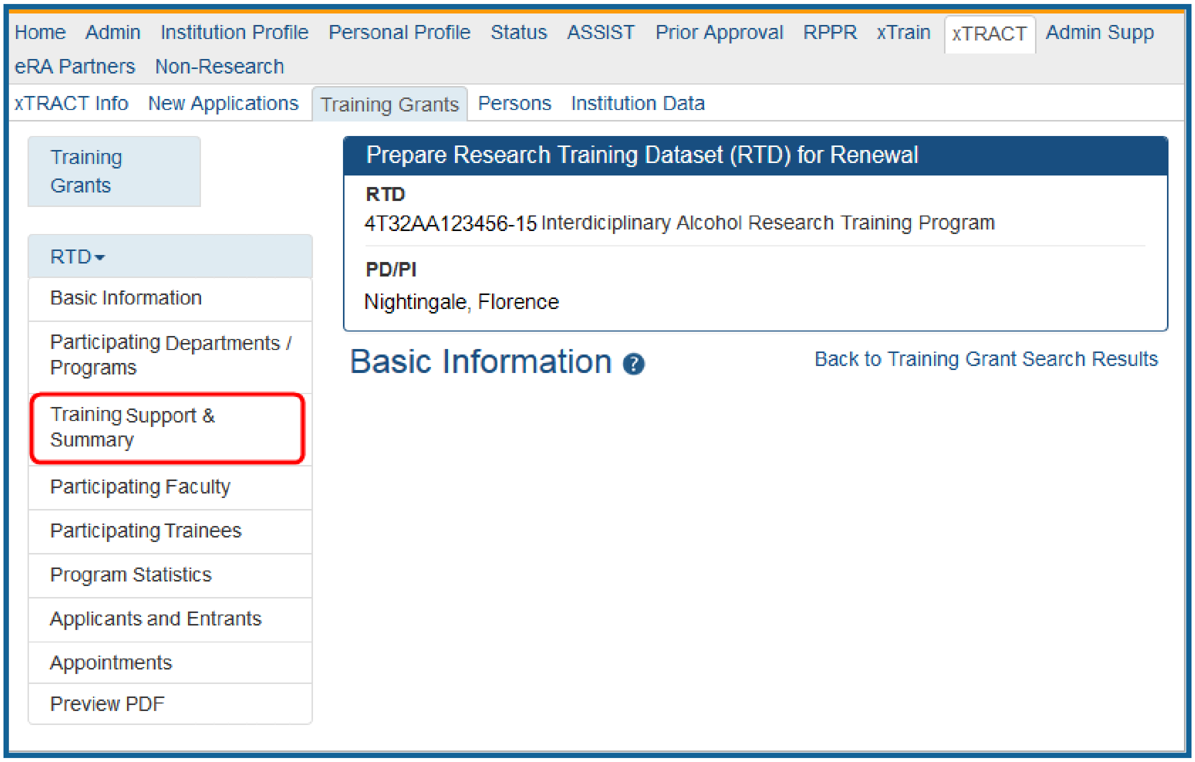


Figure 112: Training Support & Summary screen

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; Institutional Training Support.

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 **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.

Sample Table 3. Federal Organizational Research Training Grants and Related Support Available to Participating Faculty Members

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
Total				**23**	

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: https://grants.nih.gov/grants-process/write-application/forms-directory/data-tables

The sample tables below are for all types of grants (T34 and non-T34).

Sample Table 4. Research Support of Participating Faculty Members

Part I. Applicant Organization

Faculty Member	Funding Source	Grant Number	Role on Project	Grant Title	Project Period	Current Budget Period Direct Costs
Jones, Janine L.	NIH	1 R35 GM76259-01	PD/PI	Structure and Function of Acetylcholine Receptors	06/2021-05/2026	275,000
Chow, Xavier	NIH	5 K08 AI00091-03	PD/PI	Purification & Identification of Receptors	11/2013-11/2024	$140,000
Ehlers, Roger G.	Univ		PD/PI	University start-up funds	08/2021-07/2024	$350,000
Mack, Jessie R.	Fdn		PD/PI	Control of Angiogenesis	03/2018-02/2023	$190,000
Mack, Jessie R.	NSF	PCM 80-12935	PD/PI	Cell Culture Center	12/2019-11/2024	$185,000
Mack, Jessie R.	NIH	1 P01 HL71802-05	Project PI	Subproject 4: Oncogenic Kit Receptor Signaling in vivo	10/201909/2024	$165,000
Smith, James P.	None					
Zachary, Andrew	NIH	1 U01 AI28507-02	PD/PI	Human Monoclonal Antibodies as a Therapy for Staphylococcal Enterotoxin	07/2022-06/2027	$200,000
Average Grant Support per Participating Faculty Member						**$210,000**

Part II (As applicable), Partner Organization

Faculty Member	Organization	Funding Source	Grant Number	Role on Project	Grant Title	Project Period	Current Budget Period Direct Costs
Davis, Drew P.	Partnership University	NIH	1 R01 AG76259-01	PD/PI	Impact on Blood-Based Biomarker Detection of Alzheimer's in Primary Care Patients	06/2024-05/2029	$230,000
Jenkins, Shaina J.	Partnership University	NIH	5 R00 MD00091-03	PD/PI	Neuroscientific Exploration of Cultural Protective Factors	12/2023-11/2026	$160,000
Jenkins, Shaina J.	Partnership University	NIH	1 DP1 DA17092-01	PD/PI	Mitigating substance abuse in health disparity populations: intersections of neuroscience and cultural practices	07/2023-06/2028	$700,000
Davis, Taylor P.	Partnership University	NSF	7922642	PD/PI	Integrative response to environmental stress from genomic and physiological perspectives	12/2022-11/2025	$150,000
Average Grant Support per Participating Faculty Member							$310,000

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.

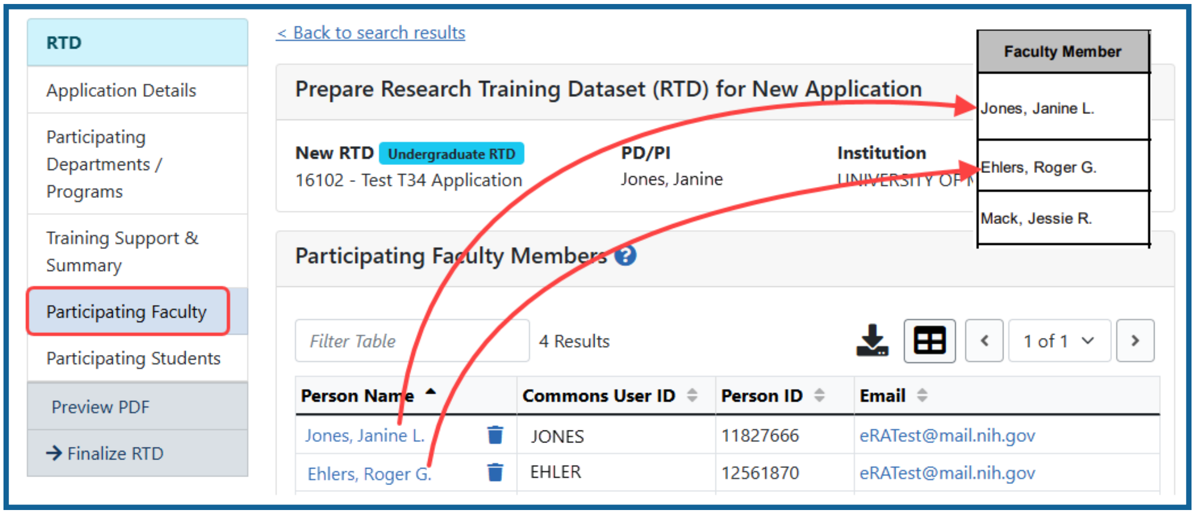


Figure 115: The Participating Faculty data populates Table 2.

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: https://grants.nih.gov/grants-process/write-application/forms-directory/data-tables

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.

Sample Table 5A. Publications of Trainees Supported by this Program: Predoctoral

Trainee Name	Faculty Member	Past or Current Trainee	Training Period	Publication (Authors, Year, Title, Journal, Volume, Inclusive Pages)
Pennix, Olufemi C.	Chu, Jeremy* K. Jordan, Angel C.	Past	2008-2016	**Pennix, O.C.M.**, Jordan A., and Chu, J.,2015 Sympathetic Noradrenergic Innervation of Drosophila, Genetics 185: 1100-1190. 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 by antibody recognition- A novel method for proximity labeling. BioRxiv 069187 **[Preprint]**
Thompson, Patricia P.	Berg, Lawrence P.	Past	2016-2021	Miter, M.H., Owens, R., **Thompson, P.**, and Berg, L., 2021, Insulin Treatment of Diabetic 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

Table 5B. Publications of Those in Training: Postdoctoral

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 biomarkers & prevention : a publication of the Prevention, 15:1234-5
Woodhull, Vitoria C.	Wilder, Laura I.	Past	2005 - 2007	**Wilder LI**, Marle JA, Atheno F, Zhudang L, and Lexingworth J, 2006, Epidemiology and pathogenisis of bone cancer., Seminars in radition oncology, 13:54-72 hisholm J, and Oakley A, 2007, of esophageal cancer., Seminars in
Warner, Daniel S	Miller, F.M.	Current	2015 - Present	oxer GV, Steele M, Wolowitz HB, and Blanca s 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.

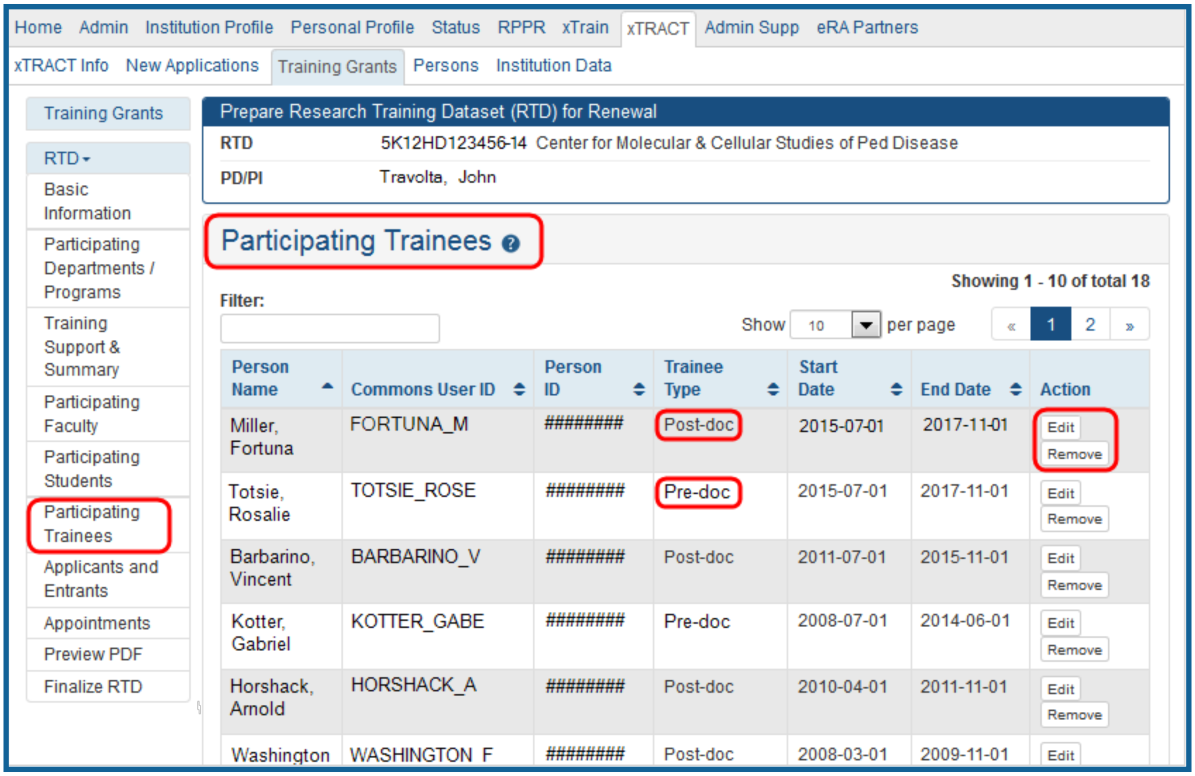


Figure 118: Participating Trainees section of RTD

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)		
Publications in *Participating Trainee Detail* (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 **Remove** button to remove it.

Refer to information in the Publications 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 Pre-doctoral or Postdoctoral, so column headings and other labels that refer to participants list "Undergraduates" instead of Postdoc/Predoc.

Sample Table 5D. Publications of Those in Training: Undergraduate

Trainee Name	Faculty Member	Past or Current Trainee	Training Period	Publication (Authors, Year, Title, Journal, Volume, Inclusive Pages)
Samuels, 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.** 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., **Kim, S.**, 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., **Chaudhari, R.** and Chu, J., 2023, Repeated Sequences in Drosophila, Genetics 185: 1100-1190. **Chaudhari, R.**, 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.

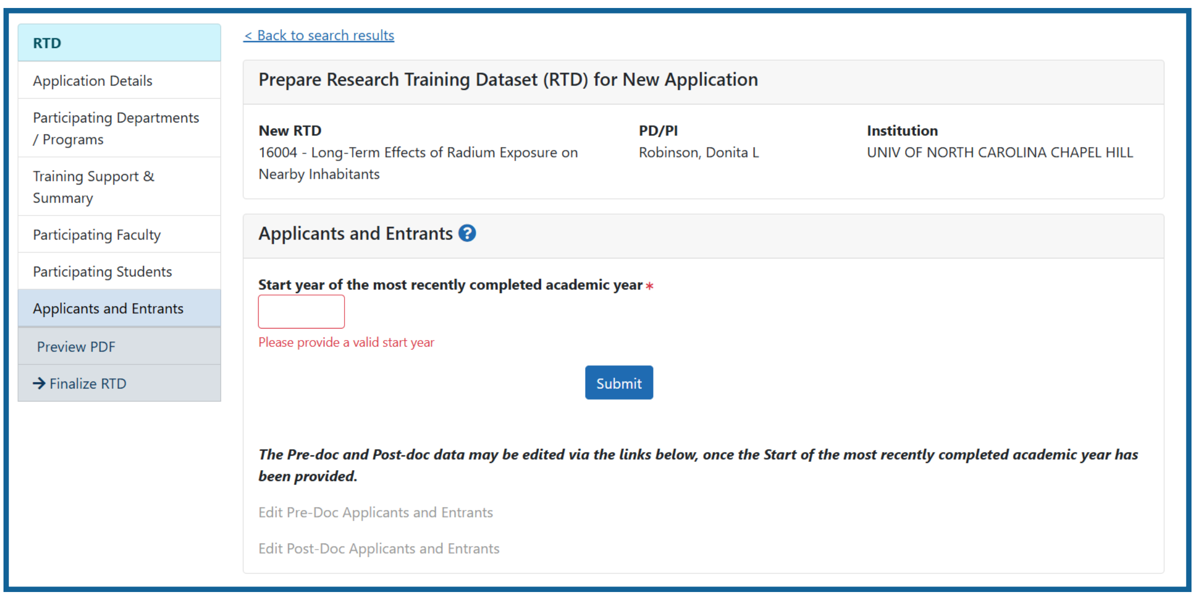
For detailed instructions on every field in the training tables, select the latest forms package here: https://grants.nih.gov/grants-process/write-application/forms-directory/data-tables

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.



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 Characteristics 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 Characteristics 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.

Sample Table 6B. Applicants, Entrants, and Their Characteristics for the Past Five Years: Postdoctoral

Counts and Characteristics

Most Recently Completed Year: 2022-2023	Total Training Program Candidates - Applied	Training Program Candidates – Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support	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 Entrants Eligible for Support	New Appointees to this Grant (Renewal/Revision Applications Only)
PhDs	24	14	7	6	4
MDs	4	1	0	0	0
Dual-Degree Holders	2	2	2	2	2
Other Degree Holders	0	0	0	0	0
Total	**30**	**17**	**9**	**8**	**6**

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 the Current 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: https://grants.nih.gov/grants-process/write-application/forms-directory/data-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.

Prepare Research Training Dataset (RTD) for Revision

RTD	PD/PI
5T32GM012345-41 Training Program for Andorian Antennae Cancer	Shran, Thylek

Appointments

Training 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

Training Positions Appointed

	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
Short-Term Appointed	1	4	5	2	12

Edit Appointments Refresh Appointments

Appointments Screen

Example Table 7 for T34 Training Grants

T34s, or Undergraduate Training Grants, have undergraduate participants rather than Pre-doctoral or Postdoctoral, so only positions awarded, appointed, and those from under-represented groups are counted.

Table 7. Appointments to the Training Grant for Each Year of the Current Project Period (Only For Renewals)

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: https://grants.nih.gov/grants-process/write-application/forms-directory/data-tables

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.

Table 8A. Part I. Those Appointed to the Training Grant

Sample Table 8A. Program Outcomes: Predoctoral

Part I. Those Appointed to the Training Grant

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
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/Staff Scientist/2023

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 for Postdoctoral Renewal/Revision Applications Requesting an Expansion for Predoctoral support)

To populate Table 8A Part II in the RTD, navigate to the RTD menu in xTRACT, and go to the Participating Trainees section.

Part II. Recent Graduates (Only for New Applications and for Postdoctoral Renewal/Revision Applications Requesting an Expansion for Predoctoral support)

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

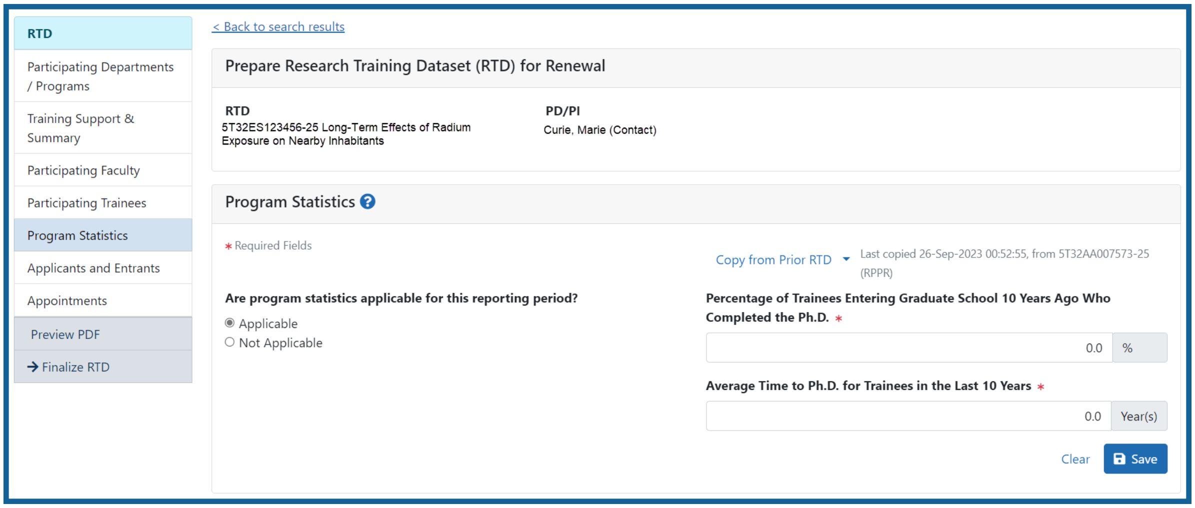
To populate Table 8A Part III in the RTD, navigate to the RTD menu in xTRACT, and go to the **Program Statistics** section.

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.



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.

Sample Table 8B. Program Outcomes: Postdoctoral

Part I. Those Appointed to the Training Grant

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
Thomas, Patrick D.	Ph.D. 2014	Berg, Lawrence P.	07/2015	TY 1: **HL T32** TY 2: **HL T32** 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	Assistant Professor Radiology University of Arizona Academia Primarily Research	CA K99/PI/2020 CA R00/PI/2021
Taylor, Doris W.	MD 2019 PhD 2019	Easygai, Francheska	07/2019	TY 1: **HL T32** TY 2: HL T32 TY 3: HL R01	MPH 2021	Disparities in cardiovascular disease	Instructor Internal Medicine Columbia Academia Primarily Research	Associate Professor Hematology Rutgers Academia Primarily Research	DK K08/PI/2023 DK R01/ Faculty Collaborator/2024

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 Pre-doctoral 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.

Part II. Recent Graduates (Only For New Applications and Predoctoral Renewal/Revision Applications Requesting Postdoctoral Support)

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.	PhD 2017	McIver, Rosalie	01/2018		None	Estrogen receptors and ovarian cancer	Assistant Professor Biology University of Colorado Academia Primarily Research	Assistant Professor Biology University of Colorado Academia Primarily Research	CA R21/PI/2023
Taylor, Susanna G.	PhD 2015MD 2017	Welte, Duncan	07/2018		None	New inhibitors for cancer imaging	Staff Scientist Radiology Massachusetts General Hospital Academia Primarily Research	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 hyper-linked 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.

Sample Table 8C. Program Outcomes: Short-Term

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.

Sample Table 8D. Program Outcomes: Undergraduate

Part I. Those Appointed to the Training Grant

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/Year Awarded
Gonzalez, Marc A.	Bradley, Andrea M.	09/2008	TY 1: None TY 2: Univ S **TY 3: GM T34** **TY 4: GM T34**	B.S. 2011 M.D./Ph.D. 2019	Therapeutic potential of cell signaling in Alzheimer disease	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 1: Univ WS TY 2: Univ WS **TY 3: GM T34** **TY 4: GM T34**	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 New Applications)

Undergraduate Student Participant	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/Year Awarded
Smith, Calvin	Hughes, Noreen	09/2012		B.S. 2016	Ribosomal protein synthesis	Ph.D. Student Dept of Molecular Biology University of Maryland Further Training		NSF Fellowship/ PI/2017
Gomez, Catherine	Zhang, Henry	09/2013		B.S. 2017	Modulation of host cellular responses	Master's Student University of Arizona College of Medicine Further Training		

Figure 130: Sample Table 8D. Program Outcomes: Undergraduate, Part I and Part II