What is xTrain?

xTrain provides program directors/principal investigators, university administrators, and trainees the ability to electronically prepare and submit PHS 2271 Statement of Appointment forms and PHS 416-7 Termination Notices associated with institutional research training programs, institutional career development awards, individual fellowships and research education awards. xTrain is also used by agency grants management staff to review and process the appointments and termination notices submitted electronically.

Grantee institution staff can use xTrain to:

- Create, route, and submit Appointments, Re-appointments, Amendments, and Termination Notices
- Track the status and timing of actions taken by xTrain users

xTrain eliminates the need for signed paper forms, except in the following situations:

Permanent U.S. residents must submit a signed and notarized statement certifying that they have (1) a Permanent Resident Card (USCIS Form I-551), or (2) other legal verification of such status

Signed hard copies of Payback Service Agreements are required for postdoctoral trainees in their first year of Kirschstein-NRSA support. For more information on the Payback Service Agreement policy, please refer to this web site. https://grants.nih.gov/grants/policy/nihgps/HTML5/section_11/11.3.13_reporting_requirements.htm#Payback

xTrain Forms Supported

xTrain supports electronic submission of the following forms:

- Statement of Appointment Form (PHS 2271)
- Termination Notice (PHS 416-7)
- Payback Agreement (PHS 6031)—This agreement is available for download/printing with instructions for signing and submitting the agreement via postal mail. xTrain will populate the basic information prior to printing

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

xTrain External User Roles

External User Role	Description
BO (Business Official)	A Business Official has signature or other authority related to administering grantee institution training grants.
SO (Signing Official)	A grantee institution's Signing Official has authority to legally bind a grantee institution for grant matters.
PD/PI (Program Director/Principal Investigator)	The Program Director or Principal Investigator is responsible for the overall direction of the training program and has the skills, knowledge and resources necessary to organize and implement a high quality research training program. In Commons, this role is called the PI role but is used for PDs as well. The Fellow also has the PI role. The PD/PI selects and appoints Trainees, amends appointments (when necessary), and initiates Termination Notices. A multi-PI can perform the same actions as the Contact PI
PD/PI Delegate (ASST)	An ASST user is a grantee institution individual that is delegated authority to perform Program Director/Principal Investigator xTrain training appointment functions. A user with the ASST role cannot submit appointments.
Trainee	Trainee: A person appointed to and supported by an

External User Role	Description
	institutional Kirschstein-NRSA or non-NRSA research training award
	Scholar: A person appointed to and supported by an institutional career development award
	Participant: A person appointed to and supported by a research education award.
Sponsor	The Sponsor is a person who mentors Fellows and can initiate and facilitate the termination of a fellowship. The Sponsor can submit the Termination Notice for foreign and federal fellowships only.
Sponsor Delegate	Users with this authority are able to perform actions similar to the Sponsor role but they are not able to submit the fellowship Termination Notice to the Agency.

External User Roles

NOTE: The Signing Official (SO), Administrative Official (AO) and Accounts Administrator (AA) can grant Business Official (BO), Principal Investigator (PI) or Assistant (ASST) roles to individuals within the grantee institution. Signing Officials can also give Business Official privileges to themselves. Trainees without eRA accounts will be invited to register as part of the xTrain appointment process.

For more information on xTrain external user roles and the actions they can take, see the eRA Commons Roles list at http://era.nih.gov/files/eRA_Commons_Roles.pdf

Accessing xTrain

Access xTrain from eRA Commons. You need an eRA Commons account to use xTrain.

See the eRA Commons online help for details on accessing eRA Commons and obtaining a Commons user account. Look for sections on:

- About eRA Commons
- Logging into eRA Commons
- Welcome to eRA Commons

To log in to xTrain:

1. Log in to eRA Commons at https://public.era.nih.gov/commons/. See https://era.nih.gov/erahelp/commons/#Commons/access/login.htm for complete details.

2. Once logged in to eRA Commons, click the **Apps** menu and select **xTrain**.
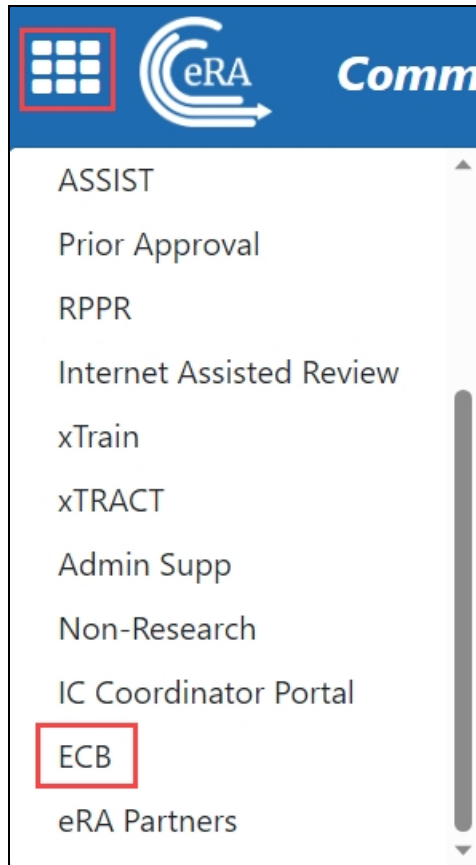
When you access xTrain, the system displays the appropriate screen based on your role. The table below lists external user roles and the default screen displayed at xTrain access for the user role.

Role	Default Screen Display
PD/PI	Awarded Grants
ASST with xTrain delegation	Default for selected user
Trainee	Appointments and Terminations
SO or BO	Business Official Home
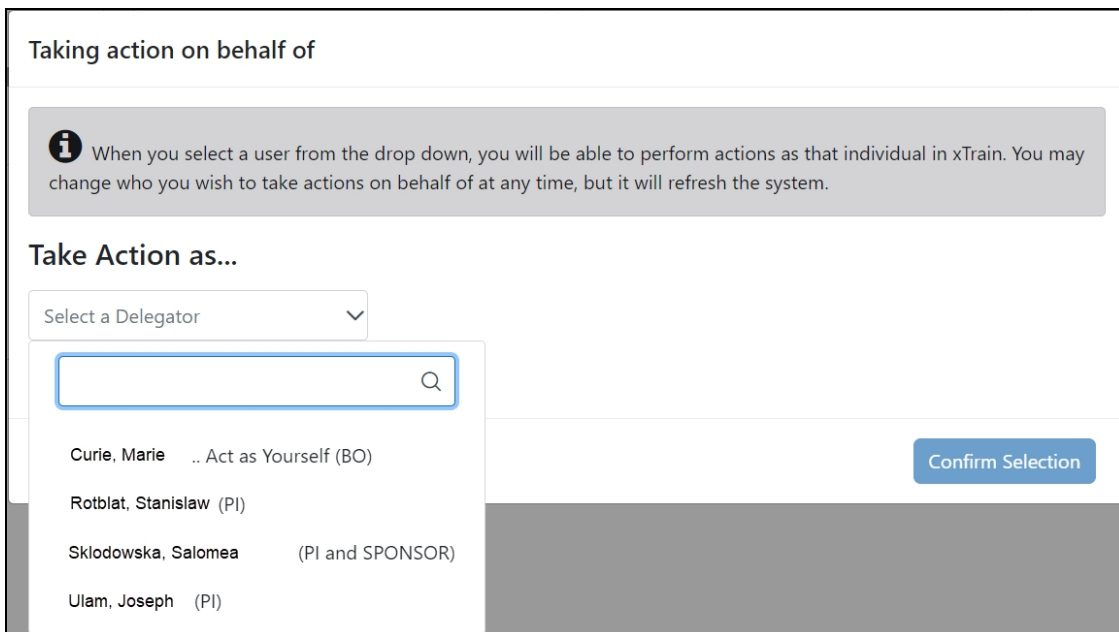
Role	Default Screen Display
Sponsor	Awarded Grants

xTrain only populates lists with grants associated with the eRA Commons account with which you are logged in. If you have multiple eRA Commons accounts, you may need to merge the historical information associated with your accounts.

Accessing xTrain as a Delegate

Commons allows you to designate other users as your delegates, so that they can take action on your behalf. For more information on delegate permissions, review the [Delegations topic](#) in the eRA Commons help.

On login, xTrain users designated as a delegate will be presented with the **Taking action on behalf of** screen.

1. Click the **Take Action as** drop-down and select the appropriate user.

2. Click the **Confirm Selection** button to log in to xTrain as a delegate of that user. A notation is displayed in the upper right-corner of the screen indicating the user you are acting as.
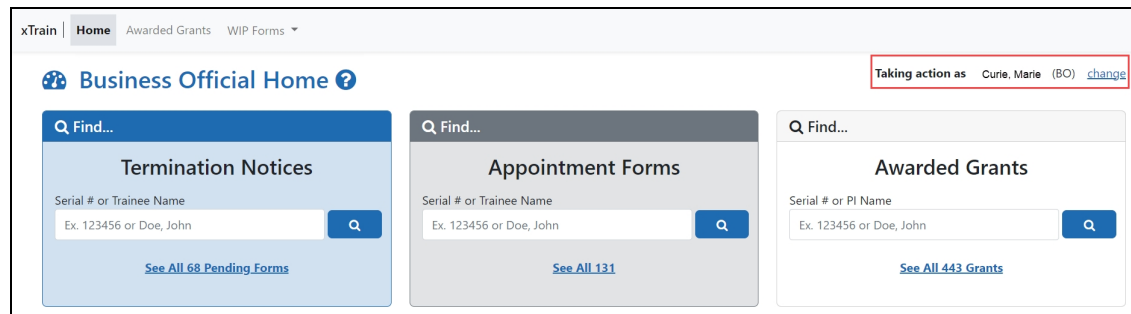
3. Click the **Change** link in the upper-right corner of the screen to reopen the **Taking action on behalf of** screen and change users.

Accessing xTrain with Multiple Institutional Affiliations

xTrain users affiliated with more than one institution can select which institution to work with after logging into xTrain.

1. Log into xTrain.

2. Click the **Person** icon in the upper-right corner of the screen. A menu is displayed, listing your current institution and roles.
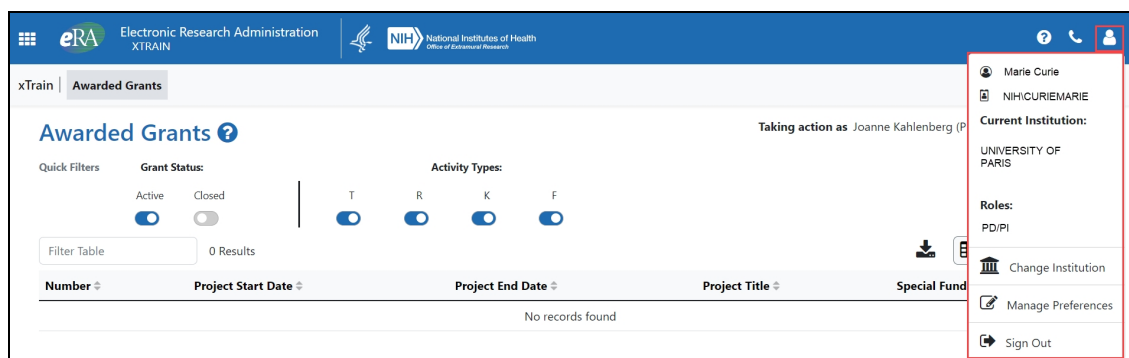
3. Click **Change Institution**. The Change Affiliation screen is displayed. The current institution and roles are highlighted in blue.
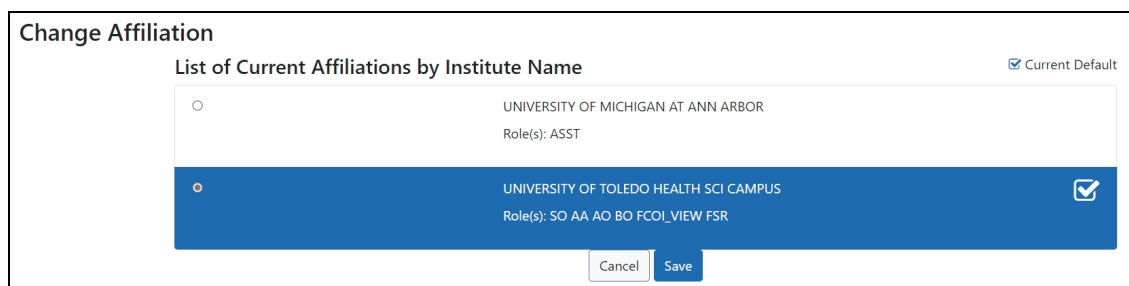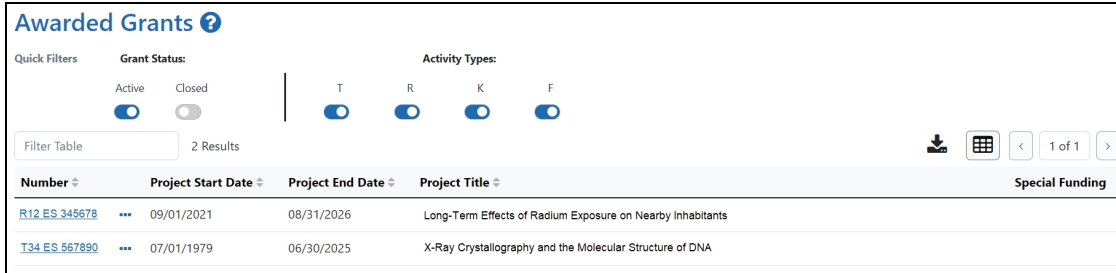
4. Click the radio button for the institution you wish to use.

5. Click the **Save** button. The change is saved and you are returned to the Commons home screen.

6. Navigate to xTrain and, if desired, click the **Person** icon in the upper-right corner of the screen to confirm your current institution and roles.

NOTE: Changing the institution can be done from any screen in Commons.

PD/PI Home Screen - Awarded Grants

The PD/PI home screen displays all training grants for which the user is listed as the PD/PI.

Using the Quick Filter toggles

The toggles allow you to filter grants by grant status and activity type. Blue indicates that you are filtering for that option; gray indicates that you are filtering out that option.

For example, the toggles in the image above will filter for active training grants.

Using the Filter Table field

The **Filter Table** field allows you to filter the table by any field containing text. The search criteria include Number, Project Start Date, Project End Date, Project Title, and Special Funding.

The table is filtered as you type in the **Filter Table** field. Matches are highlighted in yellow.

Viewing a Training Roster

Click the [•••] **Actions** button to view grant options, then select **Training Roster**.

-or-

Click a hyperlinked **Grant Number**.

The Trainee Roster screen is displayed.

Creating a Service Desk Ticket

Click the [•••] **Actions** button to view grant options, then select **Create Service Desk Ticket** to create a service desk ticket prepopulated with grant information. Complete the ticket, then click the **Submit Ticket** button to send it to the service desk.

Create Service Desk Ticket   ✕

❋ Required Fields

Grant Number	Appl ID
R12 ES 345678	1234567
Institution	**PD/PI Name**
UNIVERSITY OF PARIS	Curie, Marie

Submitter Email ❋

[   ]

Subject ❋

[   ]

Issue Description ❋

[   ]
[   ]
[   ]
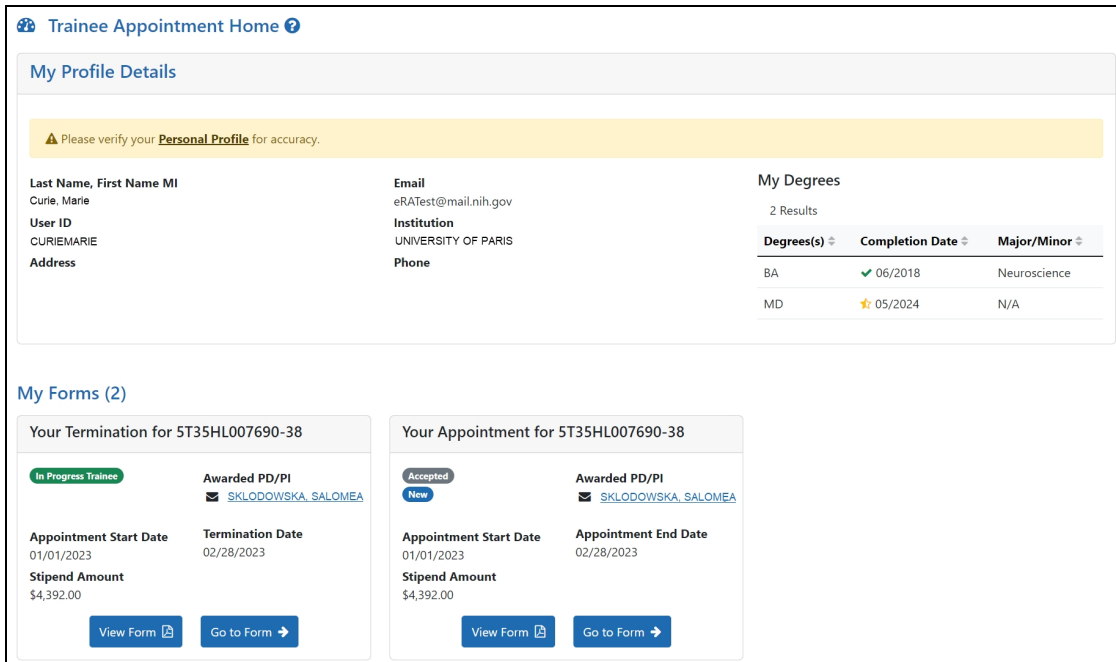
Close   ✈ Submit Ticket

Viewing a Grant

Click any hyperlinked **Grant Number** to view the *Trainee Roster* screen. For more information, refer to the *Trainee Roster Screen* topic.

Accessing xTrain as a Trainee

The Trainee home screen contains two sections: My Profile Details and My Forms.

Figure 1: Trainee Appointments and Terminations Screen

My Profile Details section

1. Review the information in the section for accuracy.

2. To make changes, click the **Personal Profile** link. The Personal Profile Summary for your Commons account is displayed. For more information, review the Personal Profile Summary topic in the eRA Commons help.

My Forms section

Termination and appointment forms are listed in the My Forms section.

1. To view a PDF version of a form, click the **View Form** button. The PDF is downloaded to the browser's default location.

2. To view a form onscreen, click the **Go to Form** button. In the case of forms that require your input, this will allow you to enter information and route the form onward for processing.

For more information on trainee Termination Notices and Appointment Forms, refer to the *Trainee Termination Notice* and *Trainee Appointment Form Screen* topics.

Business Official/Signing Official Home Screen

The BO/SO home screen provides a dashboard allowing you to quickly locate and process work-in-progress (WIP) termination notices, appointment forms, and awarded grants at your institution.

In addition, there are tabs at the top of the screen that provide a focused view of awarded grants, WIP appointments, and WIP terminations.

Using the Pending Termination Notices and Pending Appointment Forms cards
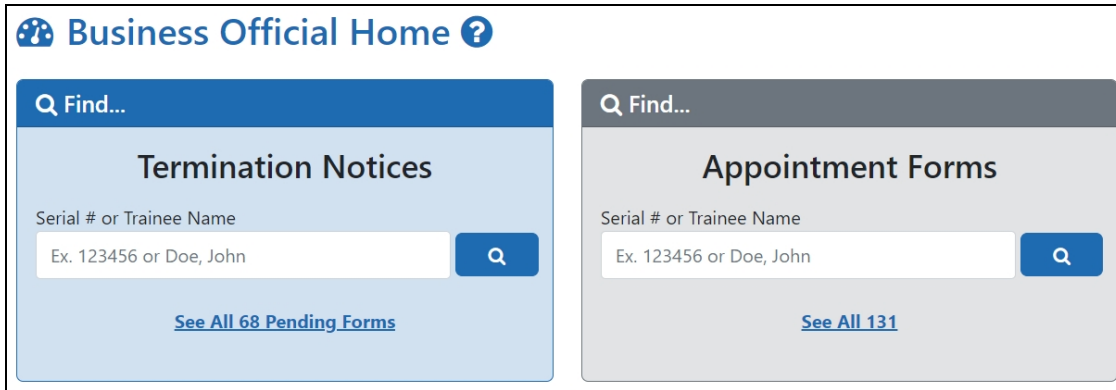
1. Enter the serial number or trainee name in the search field on the appropriate card. As you type, possible matches are displayed. You may select a match from the list or simply click the **Search** button to search for the typed text.
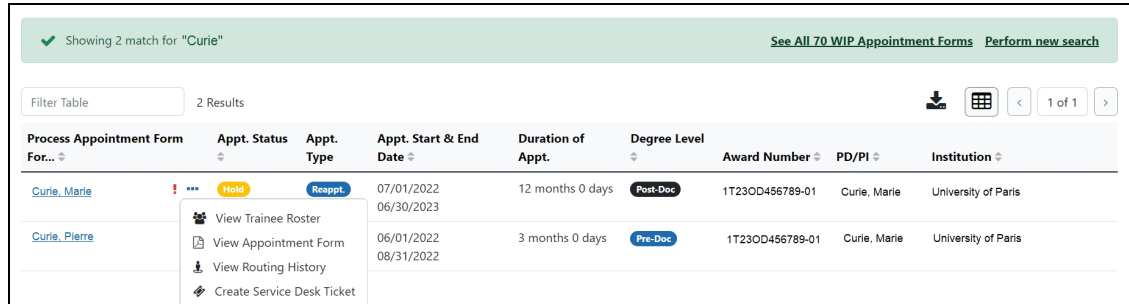

A list of possible matches is displayed.

2. Click the [...] **Actions** button to view a list of available options.

- **View Trainee Roster** opens the Grant Details screen.

- **View Appointment Form** downloads the Statement of Appointment form. You may also click the trainee name to view the appointment form in the browser. Only available for pending appointment forms.

- **View Termination Notice** downloads the Termination Notice form. You may also click the trainee name to view the Termination Notices screen in the browser, which contains grant details. Only available for pending termination notices.

- **View Routing History** displays the routing history for the current appointment form. Click here to view the Routing History.

- **Create Service Desk Ticket** opens a form prefilled with grant and trainee details.

Create Service Desk Ticket ✕

* Required Fields

Grant Number   **Appl ID**
1T23OD456789-01   12345678

Trainee Name   **PD/PI Name**
Curie, Marie   Curie, Marie

Institution
UNIVERSITY OF PARIS

Submitter Email *

[   ]

Subject *

[   ]

Issue Description *

[   ]
[   ]

Close   ◁ Submit Ticket

Complete the form and click the **Submit Ticket** button to create the ticket.
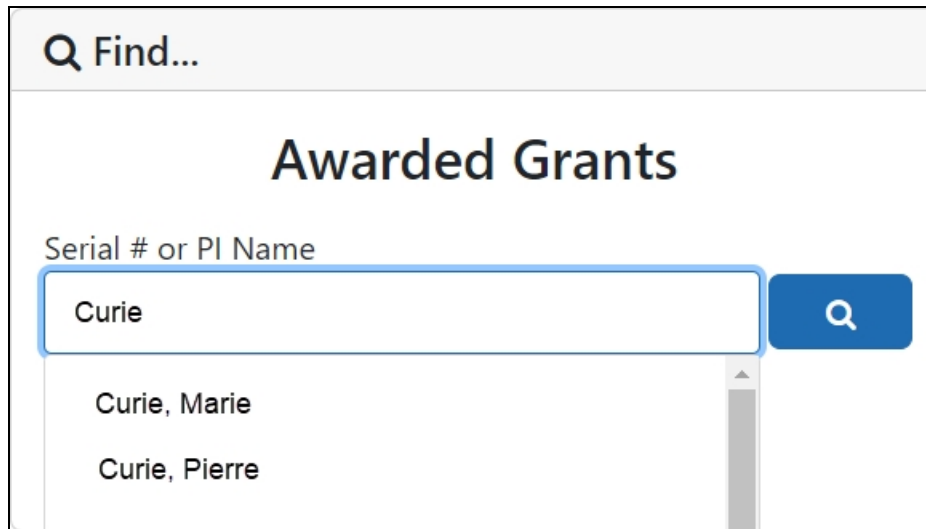
Using the Awarded Grants card

🔍 Find…

Awarded Grants

Serial # or PI Name

[Ex. 123456 or Doe, John   ]   🔍

See All 443 Grants

1. Enter the serial number or PI name in the search field on the appropriate card. Note that serial numbers must be at least six (6) digits long. As you type, possible matches are displayed. You may select a match from the list or simply click the [🔍] **Search** button to search for the typed text.

🔍 **Find...**

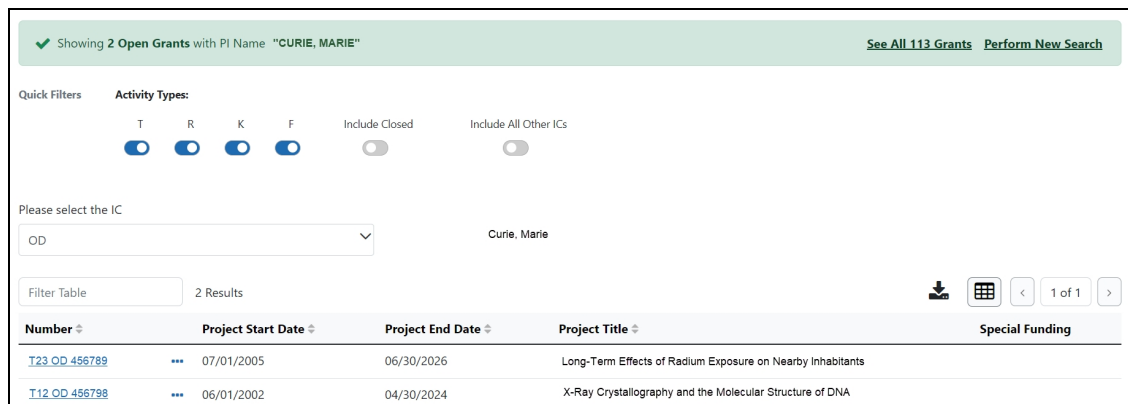**Awarded Grants**

Serial # or PI Name

Curie   🔍

Curie, Marie

Curie, Pierre

A list of possible matches is displayed.

✓ Showing **2 Open Grants** with PI Name **"CURIE, MARIE"**   See All 113 Grants   Perform New Search

Quick Filters   **Activity Types:**

T   R   K   F   Include Closed   Include All Other ICs

Please select the IC

OD ▾   Curie, Marie

Filter Table   2 Results   ⬇ ▦ ‹ 1 of 1 ›

Number ⇅		Project Start Date ⇅	Project End Date ⇅	Project Title ⇅	Special Funding
T23 OD 456789	•••	07/01/2005	06/30/2026	Long-Term Effects of Radium Exposure on Nearby Inhabitants	
T12 OD 456798	•••	06/01/2002	04/30/2024	X-Ray Crystallography and the Molecular Structure of DNA	

2. Click the [•••] **Actions** button to view a list of available options.

a. Select **Trainee Roster** to open the Grant Details screen. Refer to the *Grant Details Screen* topic for more information.

b. Select **Create Service Desk Ticket** to create a service desk ticket pre-populated with grant information. Complete the ticket, then click the **Submit Ticket** button to send it to the service desk.

Using the Pending Forms table

The Pending Forms table provides you with quick access to forms that are in your queue.

1. Click the ▪▪▪ **Actions** button to view a list of available options for a trainee. For information about the options, refer to the on page 19 detailed above.

2. To process a form, click the hyperlinked trainee's name to view the Termination Notices or Appointment Forms screen. For more information, refer to the *Terminations* and *Appointments* topics.

Using the In Progress Termination Notices and In Progress Appointment Forms tables

In Progress Termination Notices		In Progress Appointment Forms	
With PI	54	With PI	91
With Trainee	0	With Trainee	40
With Any BO	14		
With Sponsor	0		

The In Progress Termination Notices and In Progress Appointment Forms tables contain links to pending termination notices and appointment forms broken out by category.

1. Click a hyperlinked category to view a list of pending forms in that category. Depending on the category, BOs and SOs may be able to process forms in others' queues. For example, BOs can process forms in the **With Any BO** category.