



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) | <p>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.</p> <p>A multi-PI can perform the same actions as the Contact PI</p> |
| 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 |



xTrain Quick Start Guide: Overview and Functions

| 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

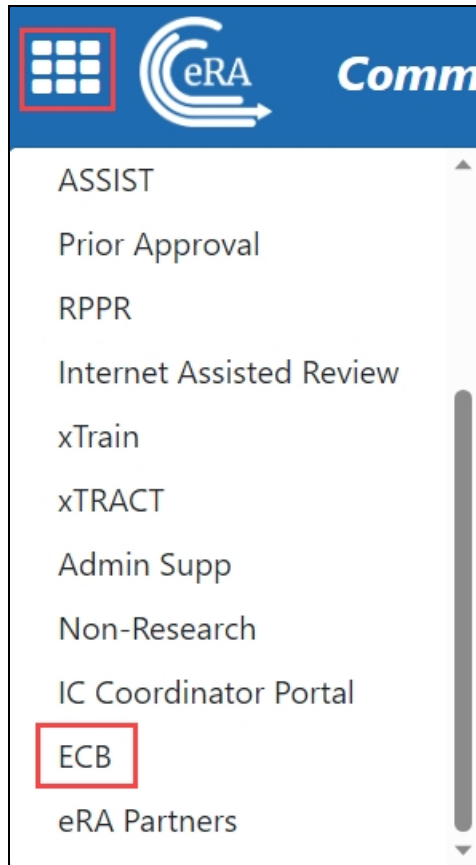
Access xTrain from eRA Commons. You need an eRA Commons account to use xTrain.

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 |



xTrain Quick Start Guide: Overview and Functions

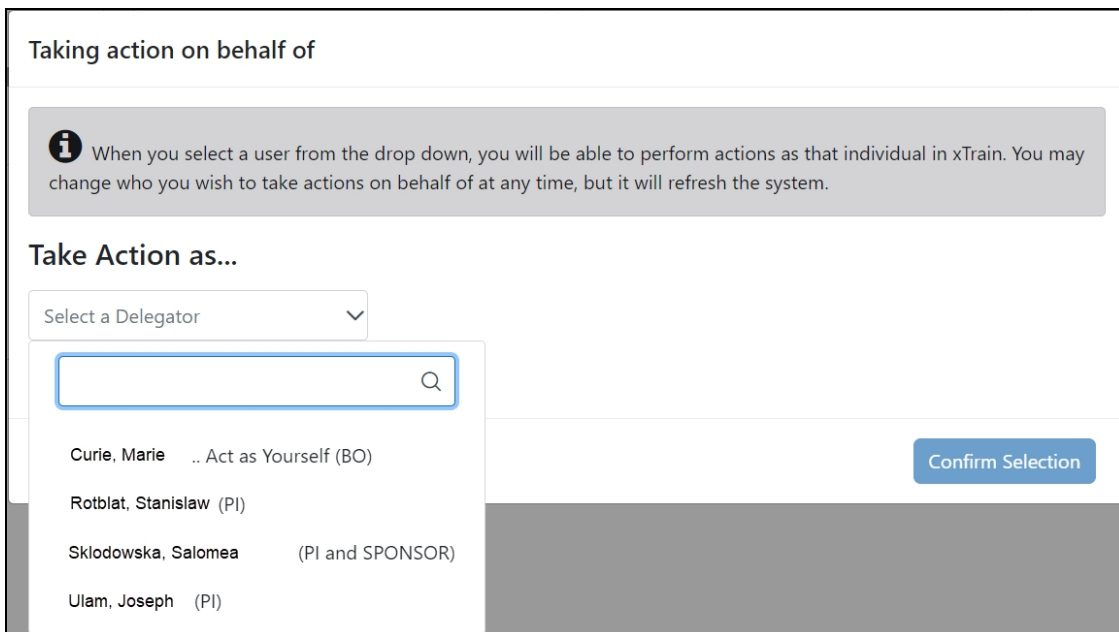
| Role | Default Screen Display |
|---------|------------------------|
| Sponsor | Awarded Grants |

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.

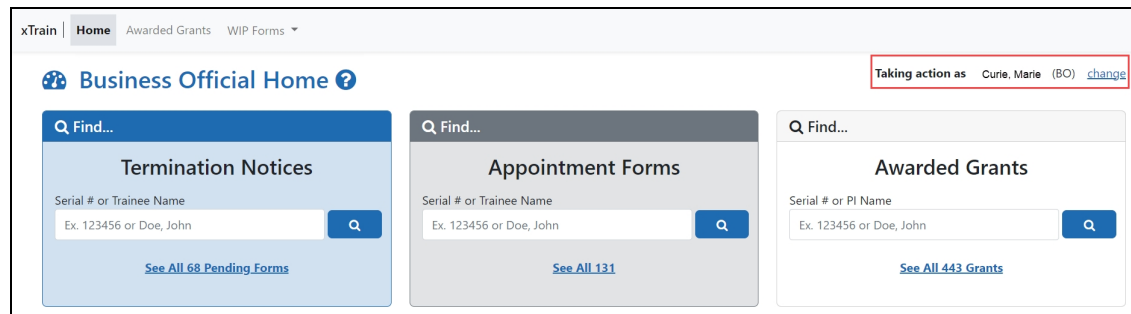
Accessing xTrain as a Delegate

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.

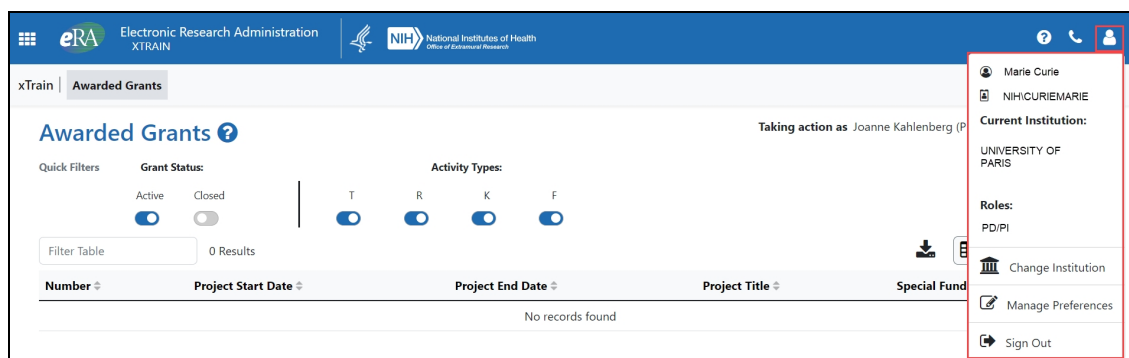


3. Click the **Change** link in the upper-right corner of the screen to reopen the **Taking action on behalf of** screen and change users.

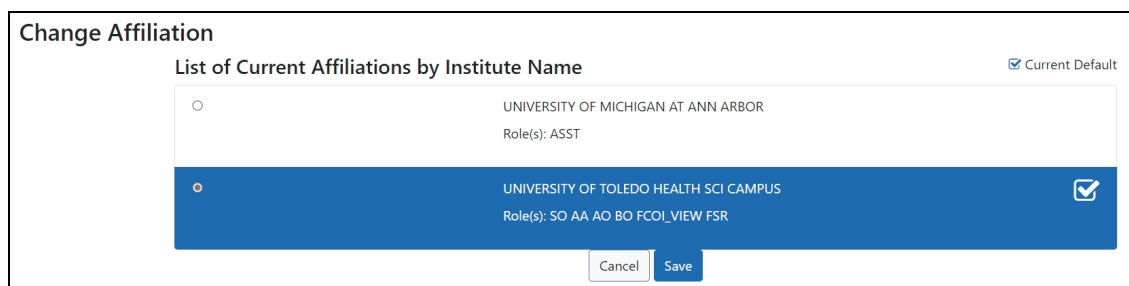
Accessing xTrain with Multiple Institutional Affiliations

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.



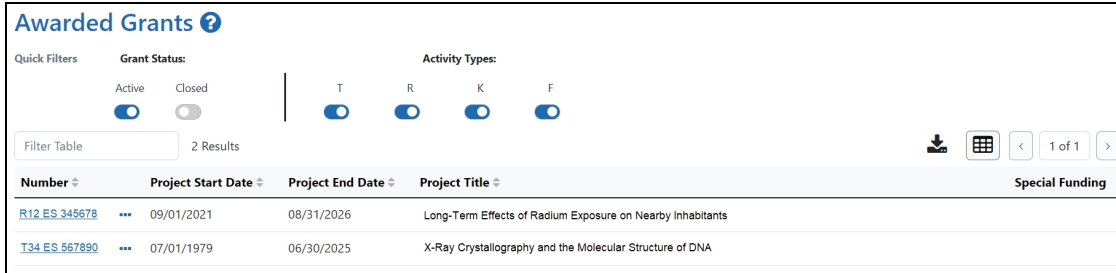
4. Click the radio button for the institution you wish to use.
5. Click the **Save** button. The change is saved and you are returned to the Commons home screen.

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.



Awarded Grants ?

Quick Filters

Grant Status: Active Closed

Activity Types: T R K F

Filter Table 2 Results Download Grid < 1 of 1 >

| Number | Project Start Date | Project End Date | Project Title | Special Funding |
|---------------|--------------------|------------------|--|-----------------|
| R12 ES 345678 | 09/01/2021 | 08/31/2026 | Long-Term Effects of Radium Exposure on Nearby Inhabitants | |
| T34 ES 567890 | 07/01/1979 | 06/30/2025 | X-Ray Crystallography and the Molecular Structure of DNA | |

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.

Awarded Grants ?

Quick Filters: Grant Status: Active (on) Closed (off) | Activity Types: T (on) R (on) K (on) F (on)

radium 2 Results

| Number | Project Start Date | Project End Date | Project Title | Special Funding |
|-------------------------------|--------------------|------------------|--|-----------------|
| R12 ES 345678 | 09/01/2021 | 08/31/2026 | Long-Term Effects of Radium Exposure on Nearby Inhabitants | |
| T34 ES 567890 | 07/01/1979 | 06/30/2025 | X-Ray Crystallography and the Molecular Structure of DNA | |

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**.

| Number | Project Start Date | Project End Date |
|-------------------------------|--------------------|------------------|
| R12 ES 345678 | 09/01/2021 | 08/31/2026 |
| T34 ES 567890 | | |

- Training Roster
- Create Service Desk Ticket

-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 R12 ES 345678 | Appl ID 1234567 |
| Institution UNIVERSITY OF PARIS | PD/PI Name Curie, Marie |

Submitter Email *

Subject *

Issue Description *

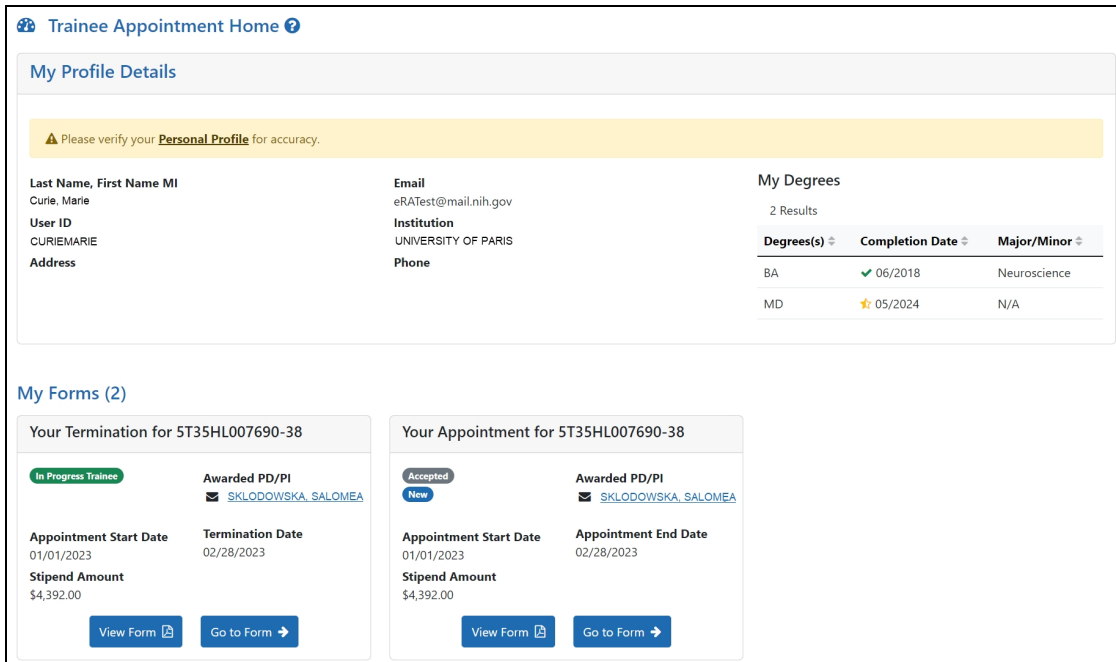
[Close](#) [Submit Ticket](#)

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.



The screenshot shows the 'Trainee Appointment Home' interface. At the top, there is a navigation bar with the title 'Trainee Appointment Home'. Below this, the 'My Profile Details' section is displayed. A yellow warning banner at the top of this section reads: 'Please verify your [Personal Profile](#) for accuracy.' The profile information is organized into three columns: 'Last Name, First Name MI' (Curie, Marie), 'User ID' (CURIEMARIE), and 'Address' (blank); 'Email' (eRAtest@mail.nih.gov), 'Institution' (UNIVERSITY OF PARIS), and 'Phone' (blank); and 'My Degrees' (2 Results). The 'My Degrees' section contains a table with columns for 'Degrees(s)', 'Completion Date', and 'Major/Minor'. The table lists two degrees: BA (completed 06/2018, Major/Minor: Neuroscience) and MD (completed 05/2024, Major/Minor: N/A). Below the profile details, the 'My Forms (2)' section is shown. It contains two cards: 'Your Termination for 5T35HL007690-38' and 'Your Appointment for 5T35HL007690-38'. The termination card shows 'In Progress Trainee' status, 'Awarded PD/PI' (SKLODOWSKA, SALOMEA), 'Appointment Start Date' (01/01/2023), 'Termination Date' (02/28/2023), and 'Stipend Amount' (\$4,392.00). The appointment card shows 'Accepted' status, 'Awarded PD/PI' (SKLODOWSKA, SALOMEA), 'Appointment Start Date' (01/01/2023), 'Appointment End Date' (02/28/2023), and 'Stipend Amount' (\$4,392.00). Both cards have 'View Form' and 'Go to Form' buttons.

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.



xTrain Quick Start Guide: Overview and Functions

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.

Business Official Home

Termination Notices
Serial # or Trainee Name
Ex. 123456 or Doe, John
[See All 68 Pending Forms](#)

Appointment Forms
Serial # or Trainee Name
Ex. 123456 or Doe, John
[See All 131](#)

Awarded Grants
Serial # or PI Name
Ex. 123456 or Doe, John
[See All 443 Grants](#)

Pending Forms 13
Filter Table 13 Results

| Process Termination Notice For... | Termination Status | Appointment Start Date | Appointment End Date | Termination Date | Num of Months and Days | Degree Level | Award Number | PD/PI |
|------------------------------------|--------------------|--------------------------|--------------------------|------------------|------------------------|--------------|-----------------|--------------------|
| Curie, Marie | In Progress BO | 03/02/2022 03/01/2023 | 03/02/2022 03/01/2023 | 03/01/2023 | 12 months 0 days | Pre-Doc | 1F23CA456789-01 | Curie, Marie |
| Franklin, Rosalind | In Progress BO | 01/01/2023 02/28/2023 | 01/01/2023 02/28/2023 | 02/28/2023 | 2 months 0 days | Pre-Doc | 1T89HL456789-38 | Franklin, Rosalind |

In Progress Termination Notices

- [With PI](#) 54
- [With Trainee](#) 0
- [With Any BO](#) 14
- [With Sponsor](#) 0

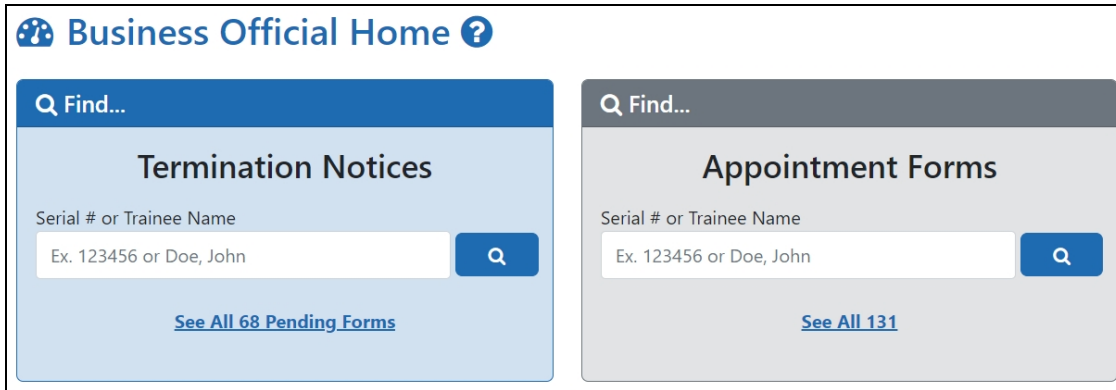
In Progress Appointment Forms


- [With PI](#) 91
- [With Trainee](#) 40

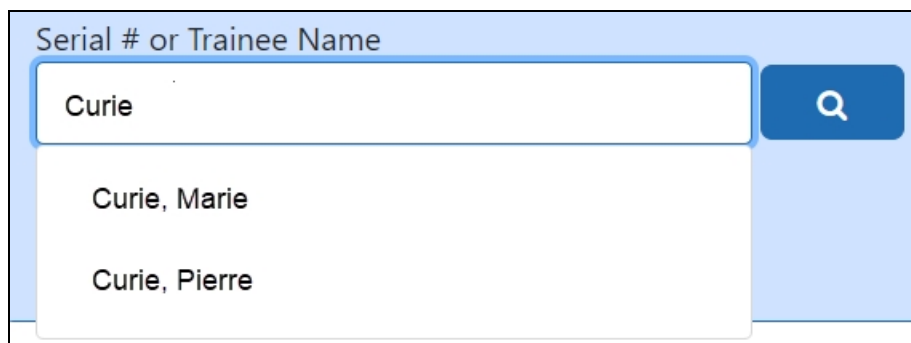
In addition, there are tabs at the top of the screen that provide a focused view of awarded grants, WIP appointments, and WIP terminations.

The navigation bar contains the following elements: the text "xTrain" followed by a vertical separator line, the "Home" tab which is highlighted with a grey background, the "Awarded Grants" tab, and the "WIP Forms" tab with a downward-pointing arrow.

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.

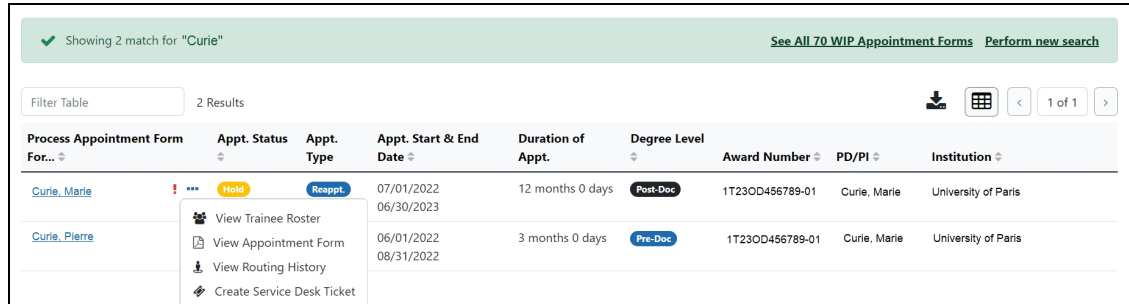


A list of possible matches is displayed.

The screenshot shows the search results table. At the top, it indicates 'Showing 2 match for "Curie"'. Below this, there is a table with the following columns: Process Appointment Form, Appt. Status, Appt. Type, Appt. Start & End Date, Duration of Appt., Degree Level, Award Number, PD/PI, and Institution. The table contains two rows of data.

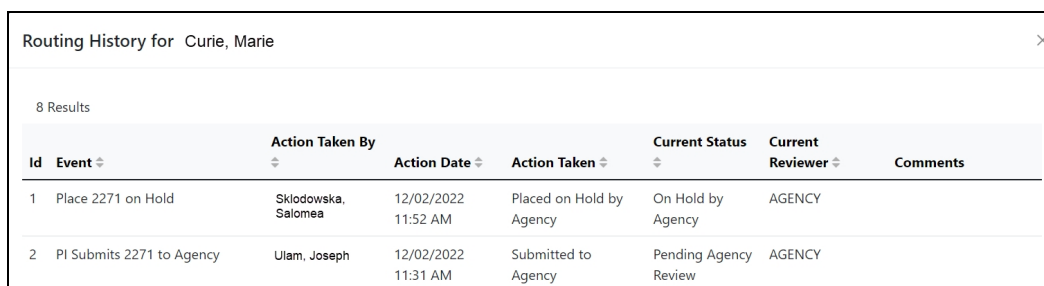
| Process Appointment Form | Appt. Status | Appt. Type | Appt. Start & End Date | Duration of Appt. | Degree Level | Award Number | PD/PI | Institution |
|-------------------------------|--------------|------------|--------------------------|-------------------|--------------|-----------------|--------------|---------------------|
| Curie, Marie | Hold | Reappt. | 07/01/2022 06/30/2023 | 12 months 0 days | Post-Doc | 1T23OD456789-01 | Curie, Marie | University of Paris |
| Curie, Pierre | Pending | New | 06/01/2022 08/31/2022 | 3 months 0 days | Pre-Doc | 1T23OD456789-01 | Curie, Marie | University of Paris |

- Click the  **Actions** button to view a list of available options.



| Process Appointment Form For... | Appt. Status | Appt. Type | Appt. Start & End Date | Duration of Appt. | Degree Level | Award Number | PD/PI | Institution |
|---------------------------------|--------------|------------|--------------------------|-------------------|--------------|-----------------|--------------|---------------------|
| Curie, Marie | Hold | Reappt. | 07/01/2022 06/30/2023 | 12 months 0 days | Post-Doc | 1T23OD456789-01 | Curie, Marie | University of Paris |
| Curie, Pierre | | | 06/01/2022 08/31/2022 | 3 months 0 days | Pre-Doc | 1T23OD456789-01 | Curie, Marie | University of Paris |

- **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.](#)



| Id | Event | Action Taken By | Action Date | Action Taken | Current Status | Current Reviewer | Comments |
|----|---------------------------|---------------------|------------------------|--------------------------|-----------------------|------------------|----------|
| 1 | Place 2271 on Hold | Skłodowska, Salomea | 12/02/2022 11:52 AM | Placed on Hold by Agency | On Hold by Agency | AGENCY | |
| 2 | PI Submits 2271 to Agency | Ulam, Joseph | 12/02/2022 11:31 AM | Submitted to Agency | Pending Agency Review | AGENCY | |

- **Create Service Desk Ticket** opens a [form prefilled with grant and trainee details.](#)

Create Service Desk Ticket

* Required Fields

| | |
|---|-----------------------------------|
| Grant Number 1T23OD456789-01 | Appl ID 12345678 |
| Trainee Name Curie, Marie | PD/PI Name 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


Q Find...

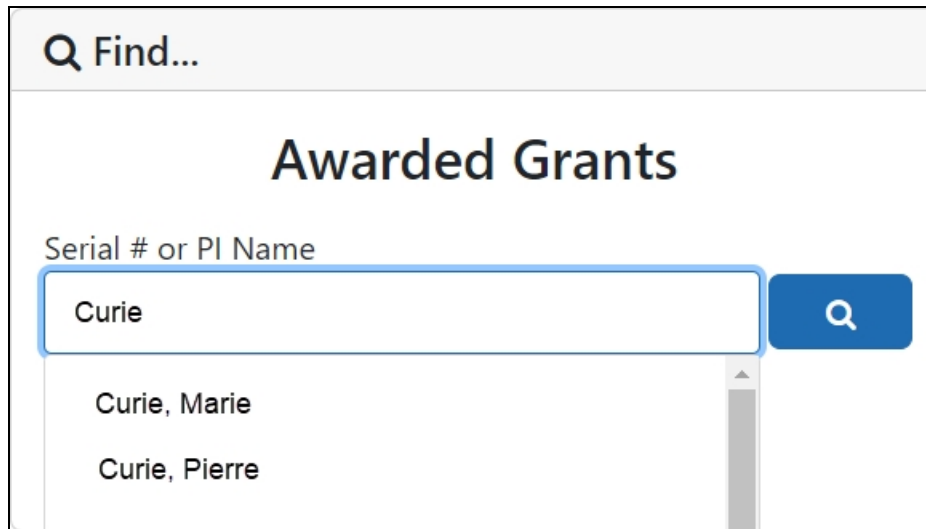
Awarded Grants

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.



Q Find...

Awarded Grants

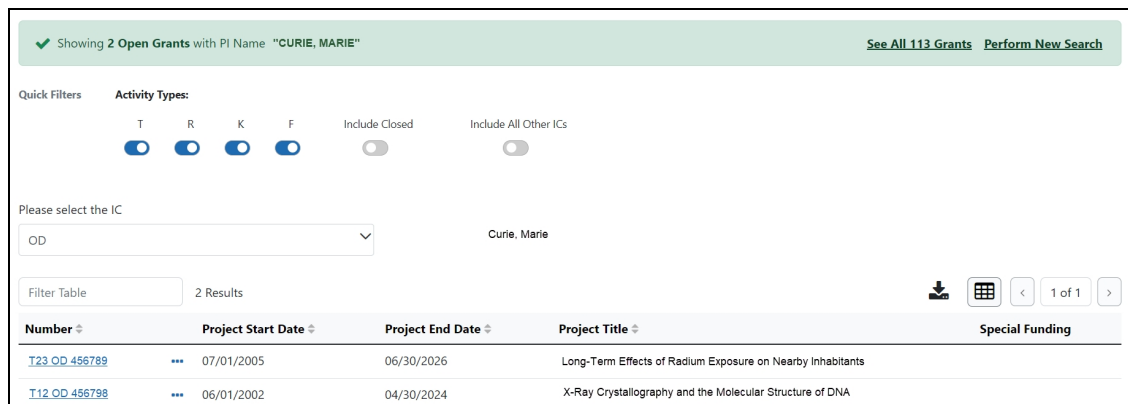
Serial # or PI Name

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

| 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.

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 | Trainee Roster Create Service Desk Ticket | 04/30/2024 | X-Ray Crystallography and the Molecular Structure of DNA | |

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

Pending Forms 13

Filter Table 13 Results 1 of 1

| Process Termination Notice For... | Termination Status | Appointment Start Date | Appointment End Date | Termination Date | Num of Months and Days | Degree Level | Award Number | PD/PI |
|------------------------------------|--------------------|--------------------------|--------------------------|------------------|------------------------|--------------|-----------------|--------------------|
| Curie, Marie | In Progress | 03/02/2022 03/01/2023 | 03/02/2022 03/01/2023 | 03/01/2023 | 12 months 0 days | Pre-Doc | 1F23CA456789-01 | Curie, Marie |
| Franklin, Rosalind | In Progress | 01/01/2023 02/28/2023 | 01/01/2023 02/28/2023 | 02/28/2023 | 2 months 0 days | Pre-Doc | 1T89HL456789-38 | Franklin, Rosalind |

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

- 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.
- 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.