CWG Response to X-Train UI and Questions

CWG Comments on UI	eRA Response
1. I like it a lot. 2. UI is not user friendly for occasional user. 3. It captured the essentials of the training business process. 4. It is user friendly. 5. Users like stipend drop down, sorting capabilities, and find the screens easy to read.	2. There will be instructions in the real version. Also, the UI is not functional.
CWG Suggestions, Questions, Comments	**eRA Response**
1. It is not clear that the description is for the FOT.	1. The FOT is not functional in the UI. The UI is not functional.
2. Have print function on statement of appointment in PDF format.	2. We plan to have both this and termination notice in PDF format, with the ability to print.
3. Have a reminder notice for permanent residents. Can the notarized statement be scanned?	3. We have a popup reminder for the Payback agreement and we can add this functionality also. Have to check if notary seal would be recognizable if scanned.
4. Can we have a sign function for Payback agreement?	4. This has not yet been approved.
5. Prior support should come from database.	5. We plan to show prior support from database.
6. Change order of the buttons for trainee screen so that Return to Program Director (PD) is before Save and Route to PD.	6. We can consider this.
7. Why do we collect the SSN if is not required? Will the trainee see asterisks for SSN on the form?	7. It is still very useful to help identify an individual with other data. We are only getting 4 digits now. No, the trainee will not see asterisks.
8. The trainee's account is associated with the training grant.	8. The trainee's account is not associated with the grant. It is associated with the trainee.
9. Will there be a way to pull up those names from the Commons database for institutional reporting purposes?	9. No. The trainees' accounts are private. The information on the 2271 is available to the institution.

Appointment Questions	CWG Response
If the statement of appointment form has been routed to the trainee and the trainee has *not* routed the form to the PD within a certain time frame—should there be an automatic email notification to the trainee/PD/delegate? If so, what should the timeframe be?	After 1 week. After 1 week it should go to delegate, but when overdue, daily. Remind only the PD and Business Official (BO) (but **not** trainee), in a single list. Yes to PD and delegate, 3–5 days.
If the statement of appointment form has *not* been submitted to DHHS within a defined timeframe, should there be a notification to the PD? If so, what is your suggested timeframe?	1 Week. A few days after the due date.
Does the PD want notification when all the slots on a grant have been filled or notification that slots have *not* been filled? If so, what is your preferred time frame for this notification?	Quarterly and 2 months prior to budget end date. Yes—6 months before the budget end date. 60–45 days prior to end date Notify PD, 1 or 2 months before end of grant. eRA—We have slot information and can provide notification as well.
Termination Process	**CWG Response**
When a termination notice has to be initiated, the PD/PD delegate will be notified, beginning 60 days in advance of the end date of appointment, to either re-appoint or terminate. (Then 30 days, then 15 days in advance) The notification will be for all appointments that will terminate in the time period, and not just for one appointment or project number. (This will avoid multiple emails) The notification will be sorted by grant number, pre vs. post doc, and time remaining until end date. If PD does not initiate the termination notice by 15 days in advance of the end date of the appointment, he will be notified that he is being	The process is reasonable. Be sure to include the Delegate. Likes email notification. eRA comment—The numbers will all be configurable (not hard coded and therefore easier to change, if necessary).

bypassed, and the trainee will begin the process. (We would like the trainee to have the opportunity to complete the termination notice prior to leaving.)	
Issues	**CWG Response**
1. Trainees can be sent individual emails because there is a one to one relationship with DHHS. However, PDs/delegates and BOs have one to many relationships. When awaiting signature of PD—Should we send emails for each appointment?	1. No—email per grant quarterly. No—group— Bundle.
2. Have a report that is sent every 3? days indicating all appointments awaiting signatures, or	A report, every 5 days. 2. 3 days OK.
3. Include in report (Notification of Termination) referenced above?	3. Separate those terminations awaiting signatures.
4. When and how do the BOs want to be notified about pending terminations so that it will be a benefit and not a burden?	4. BOs should receive a summary email listing of all termination forms that they must take action on. 15 days before initiation of termination is due, when initiation has shifted to trainee, when it is past due
5. When DHHS has accepted/rejected a termination, should notification be sent to the PD (Delegate), BO or all?	5. PD/Delegate Delegate, but why rejected? All Why is it rejected? If missing data machine recognize initially. If more complicated, send notice to whoever must fix.
6. Stipend amount can be adjusted slightly when end dates are	6. eRA—When partial months are involved, we are trying to

adjusted to accommodate university accounting. How much flexibility is needed?	accommodate the institution's accounting system.

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Address   http://erawebdev.od.nih.gov/UI/trainingApp/x-TrainDemo.asp   Go   Links

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Total Post Doc Slots	20	Total Pre Doc Slots	30	Total Short Term Slots	25
Total Post Doc Slots Filled	7	Total Pre Doc Slots Filled	5	Total Short Term Slots Filled	6
Total Post Doc Slots WIP	8	Total Pre Doc Slots WIP	7	Total Short Term Slots WIP	9

Appointment - Work in Progress

Trainee Name	Grant No.	FY	Appointment Start Date	End Date	Degree Level	Stipend Amt	SOA Process Status	Action
Lastname1, Firstname1 M.	2 T32 GM 12451-06	2004	06/01/2004	05/30/2005	Post Doc	$26,000	Pending	View SOA
Lastname2, Firstname2 M.	2 T32 GM 12451-06	2004	09/01/2004	08/31/2005	Pre Doc	$16,000	Pending	View SOA
Lastname3, Firstname3 M.	2 T32 GM 12451-06	2004	10/01/2004	09/30/2005	Pre Doc	$22,000	In Progress Trainee	Recall SOA	View SOA
Lastname4, Firstname4 M.	2 T32 GM 12451-06	2004	09/01/2004	08/31/2005	Post Doc	$24,000	Pending	View SOA
Lastname5, Firstname5 M.	2 T32 GM 12451-06	2004	09/01/2004	08/31/2005	Post Doc	$26,000	In Progress PI	Edit	View SOA	Submit to Agency	Delete
Lastname6, Firstname6 M.	2 T32 GM 12451-06	2004	09/01/2004	08/31/2005	Pre Doc	$18,000	In Progress PI	Edit	View SOA	Submit to Agency	Delete
Lastname7, Firstname7 M.	2 T32 GM 12451-06	2004	09/01/2004	08/31/2005	Post Doc	$24,000	In Progress Trainee	View SOA

Termination - Work in Progress

Trainee Name	Grant No.	FY	Appointment Start Date	End Date	Degree Level	Stipend Amt	Termination Process Status	Action
Lastname1, Firstname1 M.	2 T32 GM 12451-06	2004	06/01/2004	05/30/2005	Post Doc	$26,000	By-Passed PD Route	View SOA	View TN
Lastname2, Firstname2 M.	2 T32 GM 12451-06	2004	09/01/2004	08/31/2005	Pre Doc	$16,000	In Progress Trainee	View SOA	View TN	Recall TN
Lastname3, Firstname3 M.	2 T32 GM 12451-06	2004	10/01/2004	09/30/2005	Pre Doc	$22,000	In Progress BO	View SOA	View TN
Lastname4, Firstname4 M.	2 T32 GM 12451-06	2004	09/01/2004	08/31/2005	Post Doc	$24,000	Route In Progress PD	View SOA	View TN	Delete TN	Edit TN	Route BO
Lastname5, Firstname5 M.	2 T32 GM 12451-06	2004	09/01/2004	08/31/2005	Post Doc	$26,000	Submitted	View SOA	View TN
Lastname6, Firstname6 M.	2 T32 GM 12451-06	2004	09/01/2004	08/31/2005	Pre Doc	$18,000	In Progress Trainee	View SOA	View TN	Recall TN
Lastname7, Firstname7 M.	2 T32 GM 12451-06	2004	09/01/2004	08/31/2005	Post Doc	$24,000	In Progress PD	View SOA	View TN	Delete TN	Edit TN	Route TN

[Create New Trainee Appointment]   For Support Yr 06   [Back]

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