

# xTrain—Overview & Functions

## Quick Reference for Institution Users



### xTrain

The National Institutes of Health (NIH) awards Ruth L. Kirschstein National Research Service Award (Kirschstein-NRSA) training grants to support predoctoral and postdoctoral research training programs to help ensure that a diverse and highly trained workforce is available to carry out the Nation's biomedical, behavioral and clinical research agenda (see <http://grants.nih.gov/training/nrsa.htm>).

As part of the eRA Commons, an online interface where grant applicants, grantees, and federal staff can access and share administrative grant information, xTrain allows users to electronically process the required paperwork associated with Kirschstein-NRSA training grants. Grantee institution staff can use xTrain to:

- Create, route, and submit Appointments, Re-appointments, Amendments and Termination Notices
- Track the status and timing of training actions

### Forms Supported

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

- **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.

### xTrain Users

- **Business Official (BO)**—person who has signature or other authority related to administering training grants and is authorized to submit Termination Notices on behalf of the institution
- **Program Director/Principal Investigator (PD/PI)** — person responsible for the overall direction of the training program and is authorized to submit Appointments, Re-appointments and Amendments on behalf of the institution
- **PD/PI Delegate**—person, delegated by the PD/PI, with the authority to perform xTrain-related functions (except submitting Appointments) on the PD/PIs behalf; holds Assistant (ASST) role in eRA Commons
- **Trainee**—person at grantee institution who will be appointed as a Trainee on a training grant

| Function  | PD/PI    | ASST*              | BO               | SO               | Trainee |
|---|----------|--------------------|------------------|------------------|---------|
| <b>Delegate xTrain Authority</b><br>PI can designate a delegate to perform xTrain specific functions on their behalf (ability to submit to agency specifically withheld)  | ✓        |                    |                  |                  |         |
| <b>Identify Trainee</b><br>Facility to locate an existing eRA Commons profile for a Trainee   | ✓        | ✓                  |                  |                  |         |
| <b>View Trainee Roster</b><br>Access to the Trainee Roster of specific grant  | ✓<br>Own | ✓<br>Delegated PIs | ✓<br>Institution | ✓<br>Institution |         |
| <b>View List of Grants</b><br>Provide list of grants based on provided search criteria  | ✓<br>Own | ✓<br>Delegated PIs | ✓<br>Institution | ✓<br>Institution |         |
| <b>View Grant Summary</b><br>Read-only access to the cumulative grant data, such as short term, pre-doc, and post-doc slot allocation and accepted slots within a given overall grant, for each support year of the grant | ✓        | ✓                  | ✓                | ✓                |         |
| <b>View Routing History</b><br>Read-only access to routing history for Appointments and Termination Notices (TNs)   | ✓        | ✓                  | ✓                | ✓                | ✓       |
| <b>View Own Appointments and Terminations</b><br>Access to list of Appointments and TNs   |          |                    |                  |                  | ✓       |
| <b>Process 2271 (Appointment)</b><br>Ability to interact with the electronic 2271 form  |          |                    |                  |                  |         |
| Initiate New Appointment  | ✓        | ✓                  |                  |                  |         |
| Enter Data  | ✓        | ✓                  |                  |                  | ✓       |
| Route New Appointment to Trainee  | ✓        | ✓                  |                  |                  |         |
| Route New Appointment to PI   |          |                    |                  |                  | ✓       |
| Delete Appointment (not yet submitted)  | ✓        | ✓                  |                  |                  |         |
| Initiate an Amended Appointment   | ✓        | ✓                  |                  |                  |         |
| Initiate Re-appointment   | ✓        | ✓                  |                  |                  |         |
| View form in PDF format   | ✓        | ✓                  | ✓                | ✓                | ✓       |
| Submit New Appointment to Agency  | ✓        |                    |                  |                  |         |
| <b>Process TN (Termination Notice)</b><br>Ability to interact with the electronic TN  |          |                    |                  |                  |         |
| Initiate Termination Notice   | ✓        | ✓                  | ✓                |                  |         |
| Enter Data  | ✓        | ✓                  | ✓                |                  | ✓       |
| Route Termination Notice to PD/PI   |          |                    | ✓                |                  | ✓       |
| Route Termination Notice to Trainee   | ✓        | ✓                  | ✓                |                  |         |
| Route Termination Notice to BO  | ✓        | ✓                  |                  |                  |         |
| Delete TN (not yet submitted)   | ✓        | ✓                  | ✓                |                  |         |
| View form in PDF format   | ✓        | ✓                  | ✓                | ✓                | ✓       |
| Submit to Agency  |          |                    | ✓                |                  |         |
| <b>Recall (if not submitted to Agency)</b><br>Previous reviewer can recall form from current reviewer   | ✓        | ✓                  | ✓                |                  | ✓       |
| <b>Validate</b><br>Run validation process to identify form errors/warnings  | ✓        | ✓                  | ✓                |                  | ✓       |