Electronic Research Administration
National Institutes of Health, Office of Extramural Research

Powering the Advancement of Science

xTrain Overview & Functions Quick Reference Guide for Institution Users

1. Overview of xTrain

xTrain provides Program Directors/Principal Investigators (PD/PI), 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 grants, 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.

2. What Forms are 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)—available for downloading and printing, for affected Trainees. xTrain will populate the basic information prior to printing.

3. Who are the xTrain Users?

- **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. The PD/PI submits Termination Notices for Appointments on KL2, K12, KM1, R25 and R90 activity codes. The PD/PI role also refers to Fellows that have received individual fellowship awards, who can initiate Termination Notices at the conclusion of their fellowships.

- **PD/PI Delegate (Assistant)**—person, delegated by the PD/PI, with the authority to perform xTrain-related functions (except submitting Appointments) on the PD/PI's behalf; holds Assistant (ASST) role in eRA Commons. A Fellow does not have a delegate.

- **Trainee**—person at grantee Institution who will be appointed as a Trainee on institutional research training grants, institutional career development awards, and research education awards.

- **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.

- **Sponsor**—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**—person, delegated by the Sponsor, who facilitates the termination of Fellowships but is not authorized to submit the Termination Notice.

4. Where Can I find xTrain Help—User Guide, Quick Reference Guides, FAQs, and Training Materials?

Check out: http://era.nih.gov/training_career/index.cfm.

Function	PD/PI	Assistant	Sponsor	Sponsor Delegate	BO	SO	Trainee
Delegate xTrain Authority PD/PI (except for fellows) can designate a delegate to perform xTrain specific functions on their behalf (ability to submit to agency specifically withheld) A Sponsor can also can designate a delegate to perform xTrain specific functions on their behalf (ability to submit to agency specifically withheld)	✓		✓				
Identify Trainee Facility to locate an existing eRA Commons profile for a Trainee	✓	✓	✓	✓		✓	
View Trainee Roster Access to the Trainee Roster of specific grant	✓ Own	✓ Delegated PIs	✓ Fellows	✓ Fellows	✓ Institution	✓ Institution	
View List of Grants Provide list of grants based on provided search criteria	✓ Own	✓ Delegated PIs	✓ Fellows	✓ Fellows	✓ Institution	✓ Institution	
View Grant Summary 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	✓	✓	✓	✓	✓	✓	
View Routing History Read-only access to routing history for Appointments and Terminations Notices (TNs)	✓	✓	✓	✓	✓	✓	✓
View Own Appointments and Terminations Access to list of Appointments and TNs							✓
Process 2271 (Appointment) Ability to interact with the electronic 2271 form							
Initiate New Appointment	✓	✓					
Enter Data	✓	✓					✓
Route New Appointment to	✓	✓					

Function	PD/PI	Assistant	Sponsor	Sponsor Delegate	BO	SO	Trainee
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	✓						
Process TN (Termination Notice) Ability to interact with the electronic TN							
Initiate Termination Notice	✓	✓	✓	✓	✓		
Enter Data	✓	✓	✓	✓	✓		✓
Route Termination Notice to PD/PI (includes Fellows)			✓ Fellows	✓ Fellows	✓		✓
Route Termination Notice to Trainee	✓	✓			✓		
Route Termination Notice to BO	✓	✓	✓	✓			
Delete TN (not yet submitted)	✓	✓	✓	✓	✓		
View form in PDF format	✓	✓	✓	✓	✓	✓	✓
Submit to Agency	✓ For activity codes - K12, KL2, KM1, R90 and R25 & For Foreign and Federal Fellowships only		✓ For Foreign and Federal Fellowships only		✓		
Recall (if not submitted to Agency) Previous reviewer can recall form from current reviewer	✓	✓	✓	✓	✓		✓
Validate Run validation process to identify form errors/warnings	✓	✓	✓	✓	✓		✓