What is xTrain?
xTrain allows grantee institutions to electronically submit and track the required paperwork (e.g., Appointment Forms and Termination Notices) for research training grants.

Why do I, as a Trainee, need to use xTrain?
You will use xTrain to complete Appointment Forms and Termination Notices and to route completed forms to the Project Director/Principal Investigator (PD/PI) of the training grant with your electronic signature.

How do I get an eRA Commons account?
If you do not have an eRA Commons account, the xTrain system will automatically send you an email with a link and instructions for registering in Commons. If you already have an account, provide your Commons User ID to the PD/PI. xTrain will automatically add the Trainee role to existing accounts.

TIP: Your eRA Commons account will follow you throughout your career—choose your Commons User ID carefully.

What is an eRA Commons Personal Profile?
Each eRA Commons account has an associated Personal Profile that includes information specific to the account holder. Personal Profile information is used to pre-populate xTrain forms. The Personal Profile also is checked to ensure all required information is provided prior to routing your xTrain forms back to the PD/PI.

Carefully fill out your Personal Profile paying particular attention to the these items that are checked within xTrain. Note that not all fields that are checked by IR are marked as required in the Personal Profile screens.

⇒ Personal Profile, Personal Information screen:
  - Gender
  - Social Security Number (SSN)—Trainees are asked to voluntarily provide the last four digits of their SSN. This information helps Agency staff uniquely identify and manage your system records.
  - Citizenship
  - Date Of Birth (DOB)
  - Disabilities*

⇒ Personal Profile, Race/Ethnicity screen:
  - Race/Ethnicity*

⇒ Personal Profile, Degrees screen:
  - Enter all degrees earned or in process since high school.

⇒ Personal Profile, Trainee-Specific Information screen:
  - Questions about outstanding US Federal debt (explanation required for “Yes” answer) and disadvantaged background.*

* Race/Ethnicity/Disability/Disadvantaged Background: Responses to these items will help provide information on the participation of individuals from diverse groups in Agency programs and identify inequities in terms of recruitment and retention. Racial, ethnic, disability and disadvantaged background information are confidential and protected by the Privacy Act of 1974; these data are used for aggregate statistical reporting only.

How do I access xTrain?
Login to eRA Commons at https://commons.era.nih.gov/commons/.
Click the xTrain tab in the blue navigation bar that runs across the top of the screen.

Where can I find xTrain help—User Guide, Quick Reference Sheets, FAQs, Training Materials, Support Contacts?
Check out: http://era.nih.gov/services_for_applicants/other/xTrain.cfm

Will using xTrain remove the need for signed paper forms?
Yes, with the following exceptions:
  - Permanent US residents must submit a notary’s signed statement certifying that they have (1) a Permanent Resident Card (USCIS Form I-551), or (2) other legal verification of such status.
  - Signed hard copy of the Payback Service Agreement is required for first-time postdoctoral trainees appointed to Kirschstein-NRSA research training grants.
<table>
<thead>
<tr>
<th>#</th>
<th>Condition</th>
<th>Type</th>
<th>Message</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Trainee Appointment Period specified exceeds 12 months</td>
<td>Error</td>
<td>A trainee appointment cannot exceed 12 months without prior approval of the awarding agency. Please adjust start/end date of the appointment or contact the Help Desk for further assistance.</td>
<td>PI</td>
</tr>
<tr>
<td>2</td>
<td>The start and end dates of the new appointment cannot be within the start and end date of existing appointment for the Trainee</td>
<td>Error</td>
<td>There is another existing appointment for Trainee on Grant [Insert Grant # and PI Name of the existing appointment]. The start and end dates of the new appointment cannot be within the start and end date of existing appointment for the Trainee.</td>
<td>PI</td>
</tr>
<tr>
<td>3</td>
<td>Appointment Start Date is not within the Budget Period year of the associated grant</td>
<td>Error</td>
<td>The trainee appointment start date should occur within the budget period year of the associated grant.</td>
<td>PI</td>
</tr>
<tr>
<td>4</td>
<td>Appointment start date should be less than appointment end date</td>
<td>Error</td>
<td>Appointment start date should be less than appointment end date.</td>
<td>PI</td>
</tr>
<tr>
<td>5</td>
<td>The trainee appointment end date must be less than or equal to the project period end date</td>
<td>Warning</td>
<td>The trainee appointment end date must be less than or equal to the project period end date.</td>
<td>PI</td>
</tr>
<tr>
<td>6</td>
<td>Trainee Race, Ethnicity, Disabilities, Gender, or Birth Date is not entered</td>
<td>Error</td>
<td>Trainee Race, Ethnicity, Disabilities, Gender and Birth Date must be entered. Where available, “Do not wish to provide” can be used. Trainee must enter this information on Personal Profile screen in eRA Commons.</td>
<td>PI/PI**</td>
</tr>
<tr>
<td>7</td>
<td>Stipend amount is not entered or is entered but is zero or less</td>
<td>Error</td>
<td>Stipend amount must be entered and be greater than zero.</td>
<td>PI</td>
</tr>
<tr>
<td>8</td>
<td>The citizenship indicator for Trainee Profile is not entered</td>
<td>Error</td>
<td>Trainee citizenship must be entered. Trainee must enter this information on Personal Profile screen in eRA Commons.</td>
<td>Trainee/PI**</td>
</tr>
<tr>
<td>9</td>
<td>Grant does not have activity code T34 and Trainee does not have at least one degree</td>
<td>Error</td>
<td>At least one trainee degree must be entered. Trainee must enter this information on Personal Profile screen in eRA Commons.</td>
<td>Trainee/PI**</td>
</tr>
<tr>
<td>10</td>
<td>Appointment is POST-DOC and Trainee does not have PhD or MD Degree or Equivalent</td>
<td>Warning</td>
<td>Trainee has not entered a PhD, MD, or equivalent degree required for this postdoctoral appointment. Trainee must enter this information on Personal Profile screen in eRA Commons.</td>
<td>Trainee/PI*</td>
</tr>
<tr>
<td>11</td>
<td>Appointment is Pre-doc and Trainee does not have Bachelor’s degree or Equivalent</td>
<td>Warning</td>
<td>Trainee has not entered a Bachelor’s Degree or equivalent required for this pre-doctoral appointment. Trainee must enter this information on Personal Profile screen in eRA Commons.</td>
<td>Trainee/PI*</td>
</tr>
<tr>
<td>12</td>
<td>Pre-Doc is receiving more than 5 years of NRSA support</td>
<td>Warning</td>
<td>Pre-Doc may not receive greater than five years of NRSA support without a waiver from the awarding agency.</td>
<td>PI</td>
</tr>
<tr>
<td>13</td>
<td>Post-Doc is receiving more than 3 years of NRSA support</td>
<td>Warning</td>
<td>Post-Doc may not receive greater than three years of NRSA support without a waiver from the awarding agency.</td>
<td>PI</td>
</tr>
<tr>
<td>14</td>
<td>Trainee profile indicates Federal Debt with no explanation provided</td>
<td>Error</td>
<td>Trainee has Federal Debt indicated in the Trainee-Specific section of their Personal Profile. An explanation for the Federal Debt must be provided.</td>
<td>Trainee</td>
</tr>
<tr>
<td>15</td>
<td>Training Grant is T32 (activity code) and the appointment period (difference between start and end dates) is less than 8 months</td>
<td>Warning</td>
<td>No trainees may be appointed for less than nine months unless the training grant has designated short-term training positions or prior approval has been granted by the awarding agency.</td>
<td>PI</td>
</tr>
<tr>
<td>16</td>
<td>Trainee Profile is missing a SSN</td>
<td>Warning</td>
<td>No SSN has been entered in the Trainee personal profile. Trainees are asked to voluntarily provide SSN information to aid in the processing of Trainee appointments by providing the agency with vital information necessary for accurate identification.</td>
<td>Trainee/PI**</td>
</tr>
<tr>
<td>17</td>
<td>For a new appointment not previously routed to Trainee, if PI tries to submit 2271 Form to Agency</td>
<td>Error</td>
<td>The Save &amp; Submit function failed. The 2271 form must be routed the Trainee prior to submission to Agency. Note: The Save &amp; Route to Trainee button appears at the bottom of the screen after the PI invites or Re-invites the Trainee to register in Commons AND the Trainee follows the emailed instructions.</td>
<td>PI</td>
</tr>
</tbody>
</table>

* Warning may be triggered if PI selects wrong stipend.
** Error/Warning displayed to PI only if Trainee has already
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
<table>
<thead>
<tr>
<th>Function</th>
<th>PD/PI</th>
<th>ASST*</th>
<th>BO</th>
<th>SO</th>
<th>Trainee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delegate xTrain Authority</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>PI can designate a delegate to perform xTrain specific functions on their behalf (ability to submit to agency specifically withheld)</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identify Trainee</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facility to locate an existing eRA Commons profile for a Trainee</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Trainee Roster</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Access to the Trainee Roster of specific grant</td>
<td>Own</td>
<td>Delegated PIs</td>
<td>Institution</td>
<td>Institution</td>
<td></td>
</tr>
<tr>
<td>View List of Grants</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Provide list of grants based on provided search criteria</td>
<td>Own</td>
<td>Delegated PIs</td>
<td>Institution</td>
<td>Institution</td>
<td></td>
</tr>
<tr>
<td>View Grant Summary</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Routing History</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Read-only access to routing history for Appointments and Termination Notices (TNs)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Own Appointments and Terminations</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access to list of Appointments and TNs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Process 2271 (Appointment)</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Ability to interact with the electronic 2271 form</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initiate New Appointment</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Enter Data</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Route New Appointment to Trainee</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Route New Appointment to PI</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Delete Appointment (not yet submitted)</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Initiate an Amended Appointment</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Initiate Re-appointment</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>View form in PDF format</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Submit New Appointment to Agency</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Process TN (Termination Notice)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Ability to interact with the electronic TN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initiate Termination Notice</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Enter Data</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Route Termination Notice to PD/PI</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Route Termination Notice to Trainee</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Route Termination Notice to BO</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Delete TN (not yet submitted)</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>View form in PDF format</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Submit to Agency</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Recall (if not submitted to Agency)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Previous reviewer can recall form from current reviewer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Validate</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Run validation process to identify form errors/warnings</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
A PD/PI can delegate to an Assistant the authority to perform all xTrain related functions on their behalf except for the authority to submit Appointments to the Agency.

Note: The eRA Commons allows PD/PIs to delegate several types of authority (e.g., PI, PPF Edit, Status, xTrain.) Currently, each type of authority must be delegated separately.

Assign Delegation
1. PD/PI logs into eRA Commons at https://commons.era.nih.gov/commons/.
2. PD/PI selects the Admin tab in the blue navigation bar across the top of the screen then clicks on the Accounts and Delegate xTrain Authority sub menus.
3. PD/PI selects the user from the list of Current Institution Users to receive delegation and clicks the Assign button. Note: Only Institution Users with the ASST role in eRA Commons are displayed in the list.
4. PD/PI clicks the Save button on the Delegate xTrain Authority Confirmation screen to complete the action.
5. The Delegate xTrain Authority Confirmation screen appears and the PD/PI must click on the Save button to complete the delegation.

Revoke Delegation
1. In the Delegate xTrain Authority screen, the PD/PI selects the user from the list of Current xTrain Delegates that will have xTrain delegation removed and clicks the Revoke button.
2. PD/PI clicks the Save button on the Revoke xTrain Authority Delegate Confirmation screen to complete the action.
1. PD/PI logs into eRA Commons and selects the xTrain tab to bring up the My Grants screen. PD/PI is presented with a list of his/her grants.
2. PD/PI finds specific grant and selects the View Trainee Roster link.

3. PD/PI selects appropriate action link:
   - Appointment—selects Create New Appointment link for the chosen grant record and provides Trainee's eRA Commons User ID if available*
   - Re-appointment—selects Re-Appoint 2271 link for chosen Trainee*
   - Amendment—selects Amend 2271 link for chosen Trainee*

   *Note: If Trainee does not have a Commons account, he/she must be invited to register and must respond to that invitation before the PD/PI can route the 2271 to the Trainee. See Trainee Account Registration within xTrain Actions.

4. A 2271 form is opened with fields pre-populated from the Trainee’s Personal Profile.
   
   Appointment Status is set to “In Progress PI”

5. Additional action buttons appear at the bottom of the form. PD/PI clicks the Save & Route to Trainee button.

   System runs validation process and presents any errors or warnings to be addressed by the PD/PI. Any errors must be corrected prior to routing. If error-free (warnings OK), the form is routed.

   Appointment Status is changed to “In Progress Trainee”

6. Trainee logs into eRA Commons and selects the xTrain tab to bring up the Trainee Appointments and Terminations screen. Trainee selects the Process 2271 link to access the Appointment form.
7. Trainee completes appropriate form fields and clicks the Save button to retain changes.
8. Once complete, the Trainee clicks the Save & Route to PI button to route the form back to the PD/PI.

   System runs validation process and presents any errors or warnings to be addressed by the Trainee. Any errors must be corrected prior to routing. If error-free (warnings OK), the form is routed.

   Trainee’s Electronic Signature is recorded.

   Appointment Status is changed to “In Progress PI”

9. From the Trainee Roster screen, PD/PI selects the Process 2271 link to open the form. PD/PI reviews the form and clicks Save to retain any updates. When satisfied with the form, the PD/PI clicks the Save & Submit to Agency button to route the form to Agency for further processing.
10. If required, PD/PI mails proof of permanent residency and/or signed hard copy of the Payback Service Agreement (first-time postdoctoral trainees appointed to Kirschstein-NRSA training grants only.)

    System runs validation process and presents any errors or warnings to be addressed by the PD/PI. Any errors must be corrected prior to routing. If error-free (warnings OK), the form is routed.

    PD/PI’s Electronic Signature is recorded.

    Status of 2271 is changed to “Pending Agency Review”

11. Agency can accept the Appointment, place it on hold until any required documentation arrives, or return it with comments.

* Email notification sent

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**KEY**

- PD/PI
- Trainee
- Agency

**June 2008**

https://commons.era.nih.gov/
Trainee Account Registration within xTrain Actions

1. From the My Grants screen, the PD/PI selects Create New Appointment link for the chosen grant record and is prompted for Trainee’s Commons User ID. Since the User ID does not exist or is not known, the PD/PI selects the Identify Trainee link instead.

2. PD/PI is presented with the Identify Trainee search screen and provides the Trainee’s last name and other known search criteria then clicks the Search button.

System searches for potential profile matches and presents results.

If a match is identified, the PD/PI selects the Create New Appointment link for the matching record and is placed in the 2271 form.

- If a Commons account exists for the profile, the system will look for the Trainee role and automatically adds it if missing. No additional registration processing is needed.
- If no Commons account is associated with the profile, the information contained in the profile will be used as the basis for setting up a new account.

Note: For many years, Agencies have entered data received on paper forms into the eRA databases for internal electronic processing. As a result, a number of profile records have been created for individuals without Commons accounts. This process will associate these historical records with the new account.

If no suitable match is identified, the PD/PI selects the Create New Trainee Profile link and the Create New Trainee Profile screen is presented. PD/PI enters last name and other known information and clicks Continue to be placed in the 2271 form.

1. From the My Grants screen, the PD/PI selects the Re-Appoint 2271 or Amend 2271 link for chosen Trainee.
2. PD/PI is placed in 2271 form.

3. PD/PI enters/updates required information and clicks Save.
4. PD/PI is presented with the Invite Trainee to Register screen with the following options:

   - Invite Trainee Now: Email with link and registration instructions is sent to Trainee and PD/PI is placed back in the 2271 form. A Re-invite Trainee to Register button is added at the bottom of the form in case the PD/PI needs to resend the invitation for any reason.
   - Invite Trainee Later: PD/PI is placed back in the 2271 form and the Invite Trainee to Register is added at the bottom of the form for later use.

   The Trainee must be invited to register and must follow the emailed registration instructions before the PD/PI can route the 2271 to the Trainee.

1. Trainee receives email and follows the registration link to create an account.
2. Trainee is presented with a Create New Account screen and supplies the requested information then clicks Continue.

System searches for any previous support records and presents the results in the Verify NIH Support screen.

3. Trainee marks any identified records as ‘Correct’ or ‘Incorrect’ and clicks Continue Account Request.
4. Trainee reviews the information displayed and clicks Complete Account Request.

It takes 2-5 days for the Agency to process the registration.
1. Project Director/Principal Investigator (PD/PI) logs into eRA Commons and selects the xTrain tab to bring up the My Grants screen. PD/PI is presented with a list of his/her grants.
2. PD/PI finds specific grant and selects the View Trainee Roster link.

3. PD/PI locates trainee on Trainee Roster screen and selects Initiate TN link.
4. PD/PI is presented with a 416-7 TN form with fields pre-populated with data from the eRA system.
5. PD/PI reviews the TN and makes any necessary updates/additions, selects the Business Official (BO) who will later submit the form and Saves the form.
   - If Trainee does not have a Commons account, he/she must be invited to register and must respond to that invitation before the PD/PI can route the TN to the Trainee. See Trainee Account Registration within xTrain for additional steps.
   - The Modify Termination Date button within the TN can be used for early terminations and the period end date of the Appointment is automatically amended.

   Termination Status is set to “In Progress PI.”

6. Additional action buttons appear at the bottom of the form. PD/PI clicks Save & Route to Trainee.

   System runs validation process and presents any errors or warnings to be addressed by the PD/PI.
   Any errors must be corrected prior to routing. If error-free (warnings OK), the form is routed.

   Termination Status is changed to “In Progress Trainee.”

   If no action is taken by Trainee in 14 business days, the system will route the form back to the PD/PI, send notification and change status to “In Progress BO.”

7. Trainee logs into eRA Commons and selects the xTrain tab to bring up the Trainee Appointments and Terminations screen. Trainee selects the Process TN link, completes appropriate form fields and clicks the Save button to retain changes.

8. Once complete, the Trainee clicks the Save & Route to PI button to route the form back to the PD/PI.

   System runs validation process and presents any errors or warnings to be addressed by the Trainee.

   If error-free (warnings OK), the form is routed. Trainee’s Electronic Signature is recorded and the Termination Status is changed to “In Progress PI.”

   If no action is taken by PD/PI in 14 business days, the system will route the form to the BO, send notification and change status to “In Progress by BO.”

9. From the Trainee Roster screen, PD/PI selects the Process TN link to open the form. PD/PI reviews the form and clicks Save to retain any updates. When satisfied with the form, the PD/PI clicks the Save & Route to BO button to route the form to the Business Official for submission.

   System runs validation process and presents any errors or warnings to be addressed by the PD/PI.

   If error-free (warnings OK), the form is routed. PD/PI’s Electronic Signature is recorded and Termination Status is changed to “In Progress BO.”

10. BO logs into eRA Commons, selects the xTrain tab and is presented with a search screen. PD/PI provides search criteria and clicks Search. BO selects the View Trainee Roster link for the grant.

11. From the Trainee Roster screen, BO clicks the Process TN link to open the form. BO reviews TN and clicks the Save & Submit to Agency button.

   System runs validation process and presents any errors or warnings to be addressed by the BO.

   If error-free (warnings OK), the form is submitted, the BO’s Electronic Signature is recorded and the Termination Status is changed to “Pending Agency Review.”

12. Agency can accept the TN or return it with comments.

### KEY

- PD/PI
- BO
- Trainee
- Agency
- July 2009

https://commons.era.nih.gov/
Trainee Account Registration within xTrain Actions

1. From the My Grants screen, the PD/PI selects the Initiate TN link for chosen Trainee.
2. PD/PI is placed in TN form.

3. PD/PI enters/updates required information and clicks Save.
4. PD/PI is presented with the Invite Trainee to Register screen with the following options:
   - Invite Trainee Now: Email with link and registration instructions is sent to Trainee and PD/PI is placed back in the TN form. A Re-invite Trainee to Register button is added at the bottom of the form in case the PD/PI needs to resend the invitation for any reason.
   - Invite Trainee Later: PD/PI is placed back in the TN form and the Invite Trainee to Register is added at the bottom of the form for later use.

The Trainee must be invited to register and must follow the emailed registration instructions before the PD/PI can route the TN to the Trainee.

1. Trainee receives email and follows the registration link to create an account.
2. Trainee is presented with a Create New Account screen and supplies the requested information then clicks Continue.

   System searches for any previous support records and presents the results in the Verify NIH Support screen.

3. Trainee marks any identified records as 'Correct' or 'Incorrect' and clicks Continue Account Request.

   It takes 2-5 days for the Agency to process the registration.