xTrain Overview Transcript

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Welcome to this video tutorial on xTrain. This video gives a high-level overview on how to use xTrain to manage trainee appointments and terminations associated with training, research, career development, and fellowship awards. xTrain, accessed via eRA Commons, is used by principal investigators, university administrators, and trainees to electronically prepare and submit PHS 2271 Statement of Appointment Forms and PHS 416-7 Termination Notices associated with institutional research training grants.

Once you are logged into eRA Commons, click the apps icon in the upper left corner. From the menu, scroll down and select the xTrain option to open the xTrain home screen.

The *Awarded Grants* screen is the first screen PIs, sponsors, and their delegates see upon login. (Business officials, signing officials, and trainees see slightly different screens tailored for their task flows.) The screen lists grants awarded to the current user as well as grants for which the current user is a sponsor. Users can use the Quick Filters section, a set of toggles that narrow down the grants shown. Using the toggle switches provided, you can filter between active and closed grants, or by enabling both switches, all grants.

You can also filter by activity type. T for institutional training awards; R for research awards; K for career development awards; and F for fellowship awards.

Clicking the Grant number takes you to the Trainee Roster screen. The screen provides the grant details at the top. The grant information is followed by grant cards that provide information for each support year of the grant. The In Progress area shows the number of Appointments and Terminations that are in process. This screen will display a count of slots and months for appointments that have been awarded to trainees and accepted by trainees to date for three categories — pre-doc, post-doc, and short term — providing this information at a glance.

In the In Progress section for a particular grant year, users can click on the **Appointments – Start New** button to search for a trainee and start a new appointment form. You can enter the details of a trainee's appointment – such as period of appointment, stipend and other information, degree earned, and background — before saving the form as a draft, routing it to the trainee, and eventually submitting the form to the agency. On this screen, the three-dot ellipses icon provides the Additional Grant Details button. This opens the Additional Grant Details screen that includes more information such as project title and Institution.   This helps ensure you are selecting the correct award for the new trainee. You can refer to the *xTrain: Creating a New Appointment* video tutorial for more information.

It is very important to note that all actions available for a grant are accessed by clicking the three-dot ellipsis icon next to the grant number throughout xTrain.

By clicking on the three-dot ellipses icon in the Number column, you can create a service desk ticket from within the module to get help with any issue. By using this option, you save time as several of the fields — such as grant number, PD/PI name, etc. are automatically populated for you. You can also access the Trainee Roster by clicking on the three dots.

On the Trainee Roster, use the Select Grants to Display menu to select the years of grants to be shown. If there are pending forms, this defaults to Years with Pending Forms, otherwise it defaults to Current Funded Segment.

Finally at the bottom of the card is a See Slots link. This opens a pop-up summary screen of the number of trainee slots awarded and accepted for each of the three categories of appointments (pre-doc, post-doc and short term).

Below the grant cards is the Roster Table, which can also be quickly displayed by clicking the **Jump to Roster Table** button on the right side of the screen. The table is divided by support year with the most recent year at the top.

Labels like Reappt (for reappointment); New, etc. help to quickly identify the appointment type. Clicking the three-dot ellipses icon next to the trainee's name opens a menu of actions. Once an appointment is accepted, the available actions include amending the appointment by selecting the Amend option; reappointing the trainee, by selecting the Reappoint option; and by selecting Initiating Termination Notice, you start the process to end the trainee's participation on the award.

From the Termination Notice screen, you set the termination date, select a business official, and complete the other fields as required before submitting the notice for further processing.

For trainees, their home screen is similar to that of the trainee roster. The top section, My Profile Details, shows general information about the trainee. And because it is important to have this information current and accurate, there is a link to the Personal Profile so data can be easily updated. It also shows the status of degrees earned on the right side. Completed degrees show a green checkmark and degrees that are in progress are noted by half filled gold star. Below the My Profile Details section are individual cards for each award segment the trainee has participated in. The trainee can see each appointment and termination form as a PDF by clicking the View Form button, or by clicking the Go to Form button, they can review the information, as it appears on the online screen.

There are a number of resources available to you should you need help with xTrain.

- xTrain Online Help https://www.era.nih.gov/erahelp/xtrain/default.htm
- Overview of xTrain https://www.era.nih.gov/help-tutorials/xtrain/xTrain-Overview.htm
- xTrain FAQs   https://www.era.nih.gov/faqs.htm#XVI
- xTrain Video Tutorials https://www.era.nih.gov/era-training/era-videos.htm#xTrain

If you need additional help, or are experiencing a technical issue with xTrain, please contact the eRA Service Desk. https://www.era.nih.gov/need-help

This concludes this video tutorial providing a high-level overview on how to use xTrain to manage appointments and terminations related to training, research, career development, and fellowship awards. Thank you for watching.