

xTrain Appointments Transcript

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Welcome to this video tutorial on xTrain. This video focuses on how a principal investigator initiates and submits the PHS 2271 Statement of Appointment Form for a trainee. xTrain is the eRA Commons module that permits principal investigators, university administrators, and trainees to electronically prepare and submit appointment and termination notices associated with institutional research training grants.

Once you are logged into eRA Commons, click on 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 xTrain home screen provides a table of your awarded and sponsored grants with quick filters to allow you to search quickly for a specific grant. Using the toggle switches provided, you can filter between active and closed grants, or by activity type.

You can access the Trainee Roster by clicking on the three-dot ellipses icon in the Number column and selecting Trainee Roster from the menu. Clicking the Grant number also takes you to the Trainee Roster.

On the Trainee Roster, you initiate a new appointment by going to the grant cards at the top of the screen that provide information for each support year of the grant. In the In Progress section for a particular grant year, click on the **Start New** button under **Appointments**. This opens the Create Appointment – Find Trainee screen. Here, you search for a trainee by entering pertinent information about the trainee, such as a Commons Username, their last, middle or first name, or an email address. Then click on Search.

From the search results, you can use the text filter text box. to help find the relevant trainee. Once you locate your potential trainee, click on their name in the first column to open the Appointment Form screen.

On this screen, click on the three-dot ellipses icon and click on the Additional Grant Details button. This opens the Additional Grant Details screen. This provides more information such as project title and Institution and helps ensure you are selecting the correct award for the new trainee.

Enter the details of a trainee's appointment, such as period of appointment, support information, and background information. The screen also shows degrees earned and degrees in progress. After the information is added, save the work up to this point as a draft, by clicking the Save as draft button. The Review Appointment Form for Save, pop-up window opens. Once you click the Save button, you can return later to the form to add additional information or make any changes. At this point the appointment status is In-Progress PI.

If the trainee does not have a Commons account, the system alerts you by displaying a warning message at the top of the Appointment Form. An email is sent to the trainee with instructions on how to obtain an eRA Commons account. Until the trainee has an account and the Personal Profile is completed, the appointment request cannot be sent to the awarding agency.

If the trainee does not respond in a timely manner, you go to the Appointment Form and click on the send a reminder link in the warning message. Confirm the information on the pop-up window and click Send Reminder to remind the trainee to get an eRA Commons account and to make sure the Personal Profile is completed accurately.

If the information is complete on the Appointment Form, go to the Save & Route to Trainee section to prepare to send the trainee an invitation. Use the Comments field to add any additional information for the trainee. These comments appear in the body of the email. Click the Send button after the comments are added.

If there is a potential issue with the appointment, such as the length of the appointment, if the trainee is unable to sign the appointment, if the appointment is going to extend past the Project Period End Date, or other scenarios, a warning message is displayed. In this case, you can confirm you want to invite the trainee by clicking the Save & Route to Trainee button on the pop-up window.

The screen refreshes with a confirmation message at the top, letting you know the appointment has been routed to the trainee. The appointment status is now In-Progress Trainee.

The trainee receives the email and accesses xTrain through eRA Commons. The trainee reviews the appointment information, makes any needed changes, and then routes the form back to you, the PI, for final review. The appointment status once again displays as In-Progress PI.

You receive an email notification that the trainee has completed the review of the appointment. Back in xTrain, you can now pull up the appointment form and if you approve of any changes made by the trainee, you can Route to Agency for agency review and approval by clicking the Submit button. Confirm you want to invite the trainee by clicking the Certify and Route to Agency button on the Route to Agency pop-up window.

The screen refreshes with a confirmation message at the top stating the appointment has been successfully submitted to the agency for review. The appointment status is now Pending Agency Review.

After agency review and approval, the appointment status displays a green checkmark in the trainee roster table. Both the PI and the trainee receive an email notification that the appointment has been approved. The appointment process is now complete.

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 that focuses on how a principal investigator initiates and submits the PHS 2271 Statement of Appointment Form for a trainee. Thank you for watching.