

xTRAIN REFERENCE GUIDE

xTrain provides Principal Investigators (PI), Trainees, and department assistants/administrators (ASST) the ability to electronically process and submit Appointments, Re-Appointments, Amendments, and Termination Notices associated with institutional research training grants and career development awards. It is also used by Agency grants management staff to review and process the Appointments and Termination Notices submitted electronically.

NIH Will Require the Electronic Submission of Appointment Forms and Termination Notices via xTrain for Research Training, Fellowship, Education, and Career Awards Beginning January 2011. For more information, read <http://grants.nih.gov/grants/guide/notice-files/NOT-OD-10-072.html>.

Types of grants supported in xTrain:

- Kirschstein-NRSA undergraduate institutional training grants (T34 – Appointment Forms only)
- Kirschstein-NRSA predoctoral and postdoctoral institutional training grants (T32, T35, T90, TL1, and TU2)
- Kirschstein-NRSA fellowships (F30, F31, F32, and F33 – Termination Notice only)
- National Library of Medicine institutional training grants (T15)
- Research education awards (R25, R90)
- Institutional career development awards (K12, KL2, KM1)

What Does the Trainee need to do?

Trainees must use xTrain to complete Appointment Forms and Termination Notices and to route completed forms to the PI of the training grant with Trainee electronic signature. Trainees must have an [eRA Commons](#) account. If the Trainee does not have an account, the xTrain system will automatically send an email with a link and instructions for registering in Commons.

Trainee Quick Reference: [xTrain - Getting Started Reference for Trainees](#)

How to – PI Delegate xTrain Authority

A PD/PI can delegate to an Assistant (ASST) within his/her department the authority to perform all xTrain related functions on their behalf except for the authority to submit Appointments to the Agency. The ASST works with the PI to ensure functions are completed timely. If the ASST is not already registered with eRA Commons, they must log on to the ORA website to [Sign up for eRA Commons](#).

PD/PI Delegation of xTrain Authority

- PI logs into [eRA Commons](#).
- 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.
- 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.

- PI clicks the Save button on the Delegate xTrain Authority Confirmation screen to complete the action.
- The Delegate xTrain Authority Confirmation screen appears and the PD/PI must click on the Save button to complete the delegation.

Note: If the PI is affiliated with more than one institution, they need to be logged into the institution profile associated with that Training Grant. After logging into Commons, in the upper right hand corner of the screen, click on Institution (if affiliated with more than one, this will be hyperlinked). This will automatically switch to the other affiliation.

What Does the PI/ASST need to do?

Submit Statement of Appointment (Form 2771)

Click here for detailed instructions: [Initiating xTrain Appointments](#)

- The PI/ASST logs into [eRA Commons](#), accesses xTrain Trainee roster, and initiates a 2271.
- The PI/ASST routes 2271 to Trainee. If Trainee does not have a Commons account, PI/ASST must invite the Trainee to register and the Trainee must respond to that invitation before the PI/ASST can route the 2271 to the Trainee.
- Trainee completes the form and routes it to the PI.
- PI/ASST reviews and prior to the PI submitting the 2271 to the Agency, the *PI/ASST must email the ORA/Grants and Contracts Research Administrator for review and approval.*
- The ORA/G&C emails the PI/ASST that the form is ready to be submitted.
- The PI can only electronically submit the 2271 to the Agency.

Termination Notice (TN)

Click here for detailed instructions: [Initiating xTrain Terminations](#)

- PI/ASST logs into [eRA Commons](#), accesses xTrain Trainee roster, and initiates the TN.
- PI/ASST routes TN to Trainee
- Trainee completes the TN and routes it to PI.
- PI/ASST reviews TN and routes it to Business Official (BO role in the Commons) in ORA/G&C.
- BO reviews and submits TN to Agency.
- Agency processes TN.

Payback Agreement

The Payback Agreement for first year trainees 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. Form-specific information and instructions can be found at <http://grants.nih.gov/grants/forms.htm>.

Resource: [xTrain \(eRA Commons\) website](#)

xTrain Web-Based Training through [NIH's Virtual School](#)