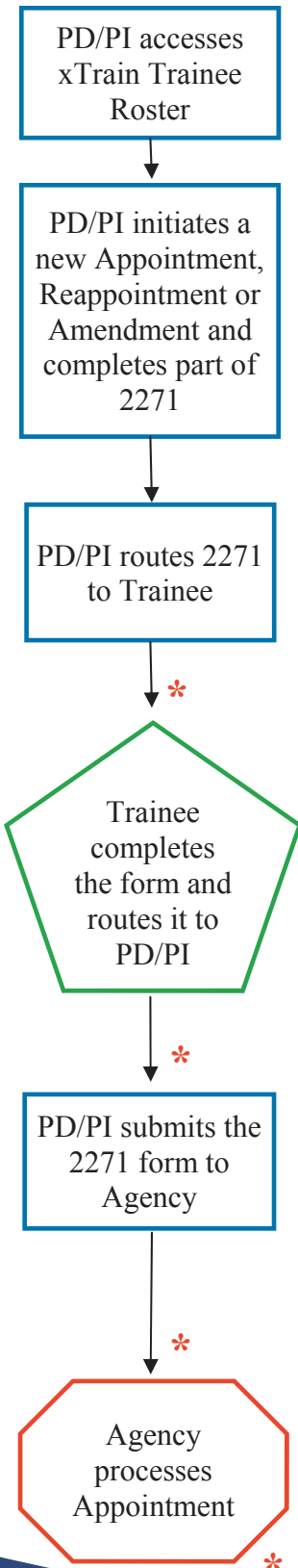


xTrain—Appointments, Reappointments & Amendments Quick Reference



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



Trainee Account Registration within xTrain Actions

PD/PI Creates New Appointment for Trainee; Trainee Commons User ID unknown or does not exist

OR

PD/PI initiates a Reappointment or Amendment; Trainee Commons User ID unknown or does not exist

PD/PI Invites Trainee to Register

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.

Trainee responds to registration email

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.

KEY

□ PD/PI

◡ Trainee