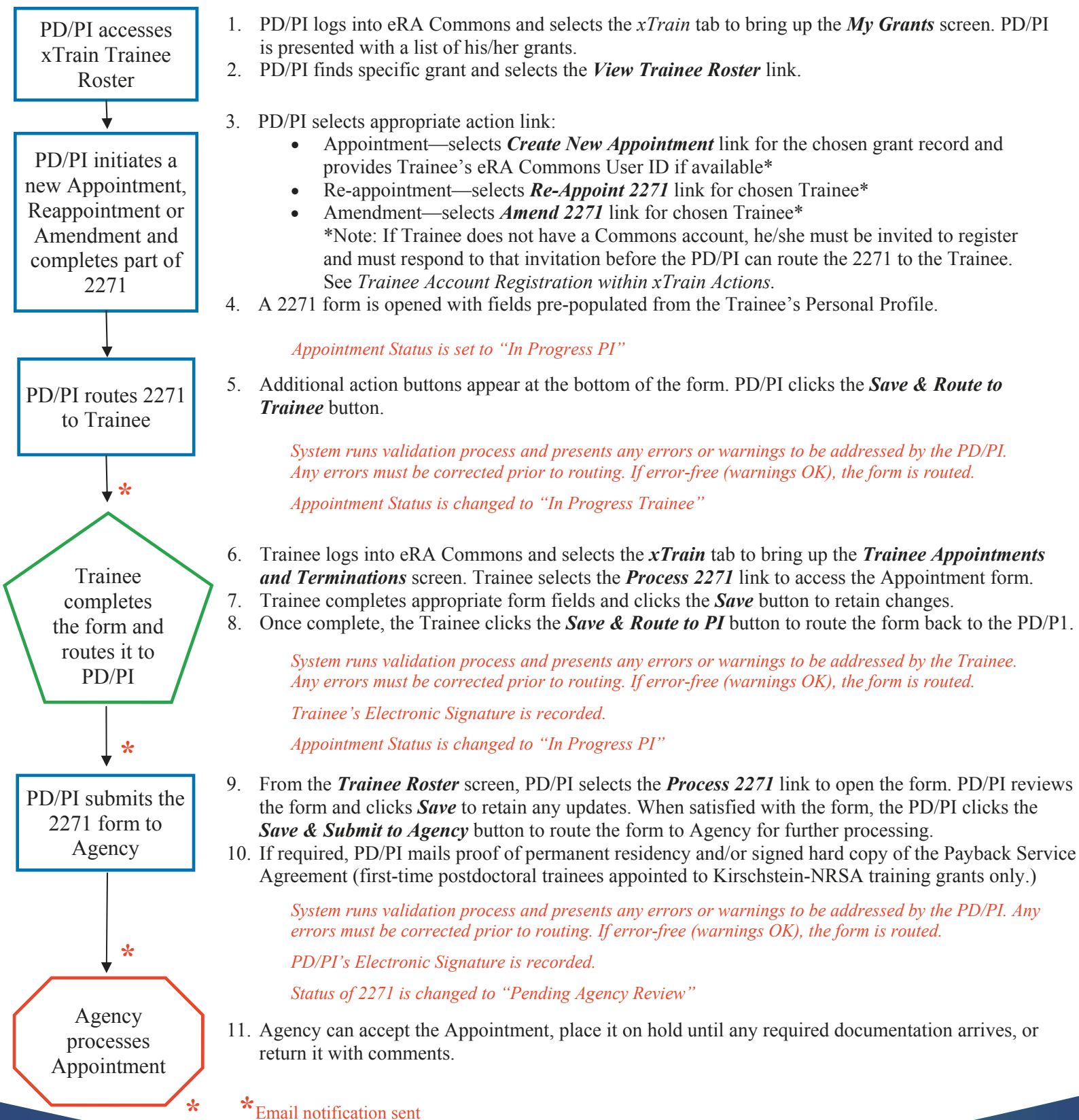


xTrain—Appointments, Reappointments & Amendments

Quick Reference



xTrain—Appointments, Reappointments & Amendments

-Page 2-

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**.
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