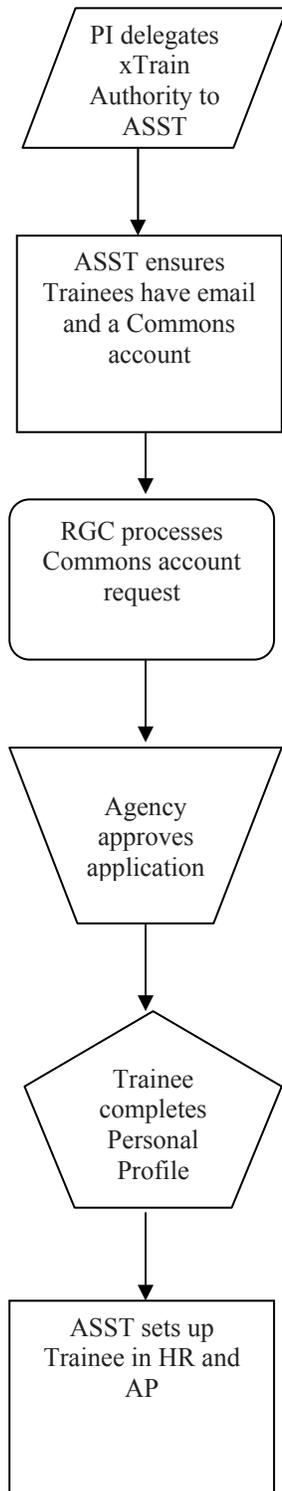# GETTING STARTED

PI delegates xTrain Authority to ASST

1. PI logs into eRA Commons and selects Admin, then Accounts, then Delegate xTrain Authority. Authority is delegated to departmental contact (ASST role in Commons).

ASST ensures Trainees have email and a Commons account

2. ASST ensures the Trainee has an OHSU email address and requests and account if not: http://ozone/itg/cacc/newaccess.shtml.
3. ASST ensures the Trainee has an eRA Commons account and requests account through Research Grants & Contracts (RGC) if not: http://www.ohsu.edu/research/rda/rgc/gcfastlaneform.shtml.

RGC processes Commons account request

4. RGC processes the request for an eRA Commons account generally within 24 business hours.

Agency approves application

5. The Agency verifies an account doesn't already exist within 48 hours.
6. The Agency sends the Trainee an invitation to join.

Trainee completes Personal Profile

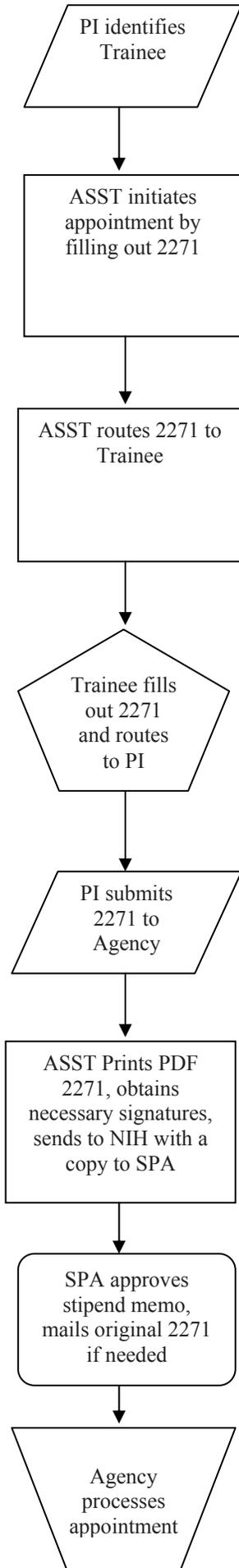7. The Trainee logs into eRA Commons and selects the Personal Profile tab and enters all of their personal information.
8. ASST submits a Scheduled Disbursements Memo to SPA: http://www.ohsu.edu/xd/about/services/financial-services/forms/upload/scheduled_disbursements_form.xlsx.

9. ASST submits a Job Change PA to HR to change the Trainee's status to Postdoc Trainee: http://ozone.ohsu.edu/hr/docs/jobchange.pdf.

ASST sets up Trainee in HR and AP

10. ASST submits a Residency Status Form to Accounts Payable (AP): http://ozone.ohsu.edu/financial/ap/pdf/ResidencyStatusInformation.pdf.
a. If the Trainee would like checks to be deposited directly into their account, submit a Direct Deposit Request form to AP: http://ozone.ohsu.edu/financial/ap/pdf/NetDirectDeposit.doc.

STATEMENT OF APPOINTMENTS

```
┌─────────────────┐
│  PI identifies  │
│     Trainee     │
└─────────────────┘
        │
        ▼
┌─────────────────┐
│  ASST initiates │
│ appointment by  │
│ filling out 2271│
└─────────────────┘
        │
        ▼
┌─────────────────┐
│ ASST routes 2271│
│   to Trainee    │
└─────────────────┘
        │
        ▼
┌─────────────────┐
│  Trainee fills  │
│    out 2271     │
│   and routes    │
│      to PI      │
└─────────────────┘
        │
        ▼
┌─────────────────┐
│   PI submits    │
│    2271 to      │
│     Agency      │
└─────────────────┘
        │
        ▼
┌─────────────────┐
│ ASST Prints PDF │
│ 2271, obtains   │
│necessary        │
│signatures,      │
│ sends to NIH    │
│ with a copy to  │
│      SPA        │
└─────────────────┘
        │
        ▼
┌─────────────────┐
│  SPA approves   │
│  stipend memo,  │
│ mails original  │
│  2271 if needed │
└─────────────────┘
        │
        ▼
┌─────────────────┐
│     Agency      │
│   processes     │
│  appointment    │
└─────────────────┘
```

1. PI identifies Trainee and notifies departmental contact (delegated Commons role: ASST) of appointment.

2. ASST logs into eRA Commons and selects the *xTrain* tab to bring up the *My Grants* screen. ASST is presented with a list of his/her delegated grants.
3. ASST chooses a grant and clicks on the *View Trainee Roster* link.
4. ASST clicks on *Create New Appointment* link for the chosen grant record.
5. ASST supplies the Trainee Commons username in the *Enter Trainee Commons User ID* screen.
6. The system associates the Trainee with the grant and displays the *Statement of Training Appointment* screen. ASST is presented with a 2271 form with some fields pre-populated.
7. ASST fills out additional information and saves form.
   - *Status of 2271 is changed to "In Progress by PI"*

8. ASST routes the 2271 form to the Trainee using the buttons on the bottom of the screen.
   - *Status of 2271 is changed to "In Progress by Trainee"*
   - *System presents confirmation notice to PD/PI that the 2271 was initiated and is assigned to the Trainee for further processing.*

9. Trainee fills out the 2271 form and routes it back to the PD/PI using the buttons on the bottom of the screen.

10. From the *Trainee Roster* screen, PD/PI clicks on the *Process 2271* link to certify and submit the 2271 to the Agency.
   - *Status of 2271 is changed to "Pending Agency Review"*
   - *Email is sent to Trainee, PD/PI and all ASSTs with xTrain delegation for PD/PI notifying them that the 2271 form was submitted to Agency*

11. ASST prints the PDF version of the form, prepares stipend memo and sends the forms to SPA.
   a. If required, the ASST would also submit the original certification of residency and the original payback agreement to NIH.
   b. Link to Stipend Memo:
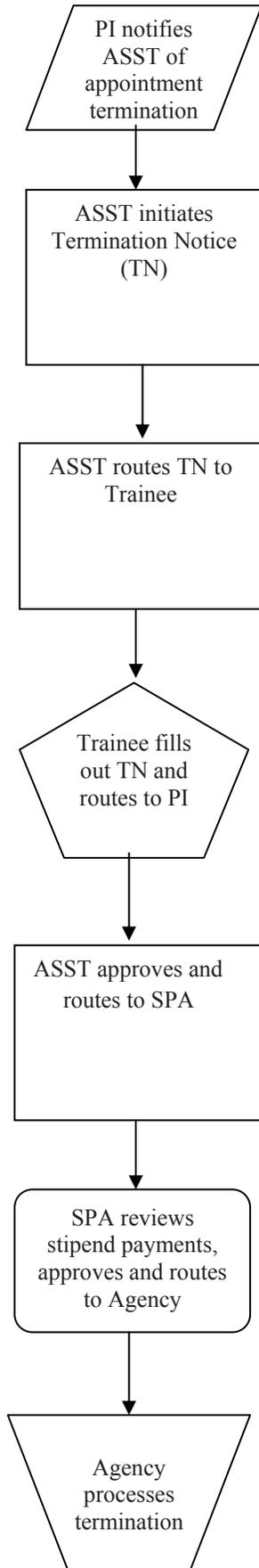   http://ozone.ohsu.edu/financial/ap/pdf/scheduleddisbursementsform.xls

12. SPA reviews and approves the stipend memo and forwards to AP.
   a. If the Trainee is a House Officer, notify Graduate Medical Education (GME) of the appointment.

13. Agency can accept the appointment, place it on hold until any required documentation arrives, or return it with comments.
   - *Email notification sent to PD/PI and Trainee regarding 2271 status.*

TERMINATION NOTICES

```
┌─────────────────┐
│   PI notifies   │
│     ASST of     │
│   appointment   │
│   termination   │
└─────────────────┘
         │
         ▼
┌─────────────────┐
│  ASST initiates │
│Termination Notice│
│      (TN)       │
└─────────────────┘
         │
         ▼
┌─────────────────┐
│ ASST routes TN to│
│     Trainee     │
└─────────────────┘
         │
         ▼
     Trainee fills
     out TN and
     routes to PI
         │
         ▼
┌─────────────────┐
│ ASST approves and│
│   routes to SPA │
└─────────────────┘
         │
         ▼
    SPA reviews
  stipend payments,
  approves and routes
    to Agency
         │
         ▼
      Agency
     processes
    termination
```

1. PI notifies departmental contact (delegated role in Commons: ASST) if a Trainee is terminating early or when their appointment is ending.

2. ASST logs into eRA Commons and selects the xTrain tab to bring up the *My Grants* screen. ASST is presented with a list of his/her delegated grants.
3. ASST chooses a grant and clicks on the *View Trainee Roster* link.
4. ASST locates trainee on *Trainee Roster* screen and clicks *Initiate TN* link.
5. ASST is presented with a 416-7 Termination Notice (TN) form with some fields pre-populated with data from the Commons.

6. ASST fills out additional information and saves the form.
   - *Status of TN is changed to "In Progress by PI".*
7. ASST routes the TN to the trainee using the buttons on the bottom of the screen.
   - *Status of TN is changed to "In Progress by Trainee".*
   - *If no action is taken by Trainee in 14 business days, the system will route the form back to the PD/PI, send notification and change status to "In Progress by PI".*

7. Trainee fills out pertinent information and saves the form.
   - *Status of TN is changed to "In Progress by Trainee*
8. Trainee routes the TN back to the PD/PI using the buttons on the bottom of the screen.
   - *Status of TN is changed to "In Progress by PI".*
   - *If no action is taken by PD/PI in 14 business days, the system will route the form to the BO, send notification and change status to "In Progress by BO".*

9. ASST prints the PDF version of the form for their records and, if needed, prepares a stop stipend memo and sends to SPA.

10. ASST routes TN to Business Official (Commons role: BO) using the buttons on the bottom of the screen.
   - *Status of TN is changed to "In Progress by BO"*

11. SPA reviews the form to ensure OGA matches TN, approves stop stipend memo if needed, and gives consent to electronically approve the TN.

12. BO reviews TN and submits it to Agency using the buttons on the bottom of the screen.
   - *Status of TN is changed to "Pending Agency Review"*

13. Agency can approve the TN, place it on hold, or return it with comments.
   - *Email notification sent to PD/PI, Trainee and BO regarding status of TN.*