Contacts Meeting

April 7, 2016
Agenda

• HS SPPO Announcements

• NIH xTrain
  What it is and why you should care, w/ Glenn Saunders

• Extramural Trainee Reporting and Career Tracking (xTRACT), w/ Jill Weller
HS SPPO Announcements

1. Arpa Orojian has left UC San Diego and transitioned to the University of Chicago. HS SPPO is actively recruiting her replacement.

2. HS SPPO Ad Hoc Meeting on recent NIH Updates* will be:
   - Tuesday, May 3rd, 9am-10am, in Leichtag 107!
   - Discuss:
     - New NIH Grants & Funding Website!!!
     - New NIH Forms!!!
     - New NIH Guidelines & Instructions!!!
     - New Parent Announcements!!!

*Note: These new NIH updates will be effective on or after May 25th.
NIH X-TRAIN

WHAT IT IS AND WHY YOU SHOULD CARE.
HTTPS://ERA.NIH.GOV/ERA_TRAINING/XTRAIN.CFM
What is X-train?

- An online application using the NIH eRA Commons system that allows Institution users to electronically prepare, route and submit Appointments, Re-appointments, Amendments, and Termination Notices for various types of NIH training awards.

- Allows users to track the status of Appointments and Termination Notices.

- Not the title of a new X-men movie.

Do you have to use it?

**ABSOLUTELY!!!**
X-train Requires the user to have an eRA Commons account and a designated role.

3 types of roles:

- Principal Investigator (PD/PI)
- Business Official
- Delegate (ASST)
Principal Investigator Role

- Responsible for overall direction of the training program
- Selects and Appoints Trainees, Amends Appointments (when necessary), and initiates Termination Notices
- Also refers to individuals that have applied for or received individual fellowship awards
Business Official Role

- Person working in research institution’s business office who has signature or other authority related to administering training grants

- BOs are the only users with the authority to submit Termination Notices on behalf of the institution for institutional research training programs
PD/PI Delegate (ASST role)

- Person, delegated by the PD/PI, with the authority to perform xTrain-related functions on his/her behalf

- Same actions and notifications as PD/PI except for the ability to submit Appointments to Agency
Trainee Appointment Workflow

1. PI identifies Trainee, initiates Appointment online by filling out the 2271 form and electronically routes the form to Trainee.

2. Trainee fills out the 2271 form and updates profile and routes it back to PI.

3. PI reviews completed 2271 and routes it to Agency for final approval.

4. Agency reviews and approves the form.
Appointments

Log into the eRA Commons and choose the PI profile for the award desired. Click on the “View Training Roster” under the “Action” tab.
Appointments

Create a new appointment or re-appointment for the trainee

<table>
<thead>
<tr>
<th>Trainee/Fellow Name</th>
<th>Appointment Type</th>
<th>FY</th>
<th>Appointment Start Date</th>
<th>Appointment End Date</th>
<th>Termination Date</th>
<th>End Date Past?</th>
<th>Degree Level</th>
<th>Appointment Status</th>
<th>Appointment Source</th>
<th>Termination Status</th>
<th>Termination Source</th>
<th>Current Reviewer</th>
<th>View</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earls, Timothy R</td>
<td>New</td>
<td>2015</td>
<td>07/01/2015</td>
<td>06/30/2016</td>
<td>No</td>
<td>PRE-DOC</td>
<td>Accepted</td>
<td>Electronic</td>
<td>2271</td>
<td>View 2271</td>
<td>Amend 2271</td>
<td>Initiate TI</td>
<td>2271 Form</td>
<td></td>
</tr>
<tr>
<td>Chen, Joyce</td>
<td>Reappointment</td>
<td>2015</td>
<td>04/01/2016</td>
<td>03/31/2017</td>
<td>No</td>
<td>PRE-DOC</td>
<td>Pending Agency Review</td>
<td>Electronic</td>
<td>2271</td>
<td>View 2271</td>
<td>Amend 2271</td>
<td>Initiate TI</td>
<td>2271 Form</td>
<td></td>
</tr>
<tr>
<td>China, Amy Michelle</td>
<td>New</td>
<td>2015</td>
<td>07/01/2015</td>
<td>06/30/2016</td>
<td>No</td>
<td>PRE-DOC</td>
<td>Accepted</td>
<td>Electronic</td>
<td>2271</td>
<td>View 2271</td>
<td>Amend 2271</td>
<td>Initiate TI</td>
<td>2271 Form</td>
<td></td>
</tr>
<tr>
<td>DeRico, Jason Cruz</td>
<td>Reappointment</td>
<td>2015</td>
<td>09/01/2015</td>
<td>08/31/2016</td>
<td>No</td>
<td>PRE-DOC</td>
<td>Accepted</td>
<td>Electronic</td>
<td>2271</td>
<td>View 2271</td>
<td>Amend 2271</td>
<td>Initiate TI</td>
<td>2271 Form</td>
<td></td>
</tr>
</tbody>
</table>
Appointments

By creating a new appointment the trainee will need to be identified by his or her eRA Commons user name.

If the trainee does not have an eRA Commons account the PI or Delegate will send the trainee an invitation to register via the eRA Commons.

All trainees must fill out their personal profile in the Commons, especially the citizenship component, otherwise the system will not appoint the trainee.
Appointments

If the trainee is found to have an eRA Commons account, then the PI or delegate will fill out the electronic 2271 form in the system, setting up the dates of the appointment and stipend for the trainee.
Appointments

Once any unregistered trainees have filled out their eRA Commons profile, the electronic form 2271 can be routed to the trainee to fill out.

When the electronic 2271 form has been filled out, the trainee will route it to the PI who will then send it on to the agency for acceptance.
Re-Appointments

Clicking the re-appointment link for the trainee will start the process which is the same as new appointments.
Trainee Termination Workflow

PD/PI locates Trainee on Roster, initiates a Termination Notice (TN), inputs additional info and routes TN to Trainee.

PI reviews TN and routes it to the BO.

Trainee fills out required information and routes the TN back to PD/PI.

BO approves and routes TN to Agency.

Agency
Use the “Initiate TN” link. PI or Delegate will then choose the terminating date and route to the trainee.

The trainee is responsible for adding a progress report of his/her training to the form as well as detailing their future appointment and address.

The trainee then routes the form to the PI who routes it to the BO who routes it to the Agency.
References

https://era.nih.gov/era_training/xtrain.cfm

https://era.nih.gov/era_training/tutorials/xTrain_for_Institution_Users_sm.pdf

Training Grants
NIH xTRACT - Extramural Trainee Reporting and Career Tracking

Jill I. Weller
Project Manager
RSC – Research Service Core
What is xTRACT?

**Extramural Trainee Reporting and Career Tracking (xTRACT)**

- A pre-submission tool within eRA Commons used to create research **data training tables** for RPPR’s and institutional training grant applications

- For T32, TL1, T90/R90, and T15 applications & RPPIRs

- T35, R25, K12/KL2 awards can use it on a **pilot basis**. You may wish to wait for future editions of the system, which will include features tailored to their specific types of awards.

- T34 awards should not use the xTRACT system at all at this time
Features of xTRACT

Able to **pre-populate** some training data for training tables and reports by using **xTrain** appointment and related data.

- This includes trainee names, selected characteristics, institutions, grant numbers, and subsequent NIH and other HHS awards

Allows **manual entry** of data, for information not found in Commons or **xTrain**. This manually entered information is **stored** in **xTrain** and can be re-used when preparing future training table submissions
Benefits of xTRACT

• Will make it simpler for applicants to create data tables required for TG applications and RPPR’s to NIH, as this system will replace the current laborious method of creating the tables in free form in Word format.

• Automation will significantly reduce workload in the long run
Who Can Use xTRACT?

• Signing Officials (SO)

• Principal Investigators (PI)

• Assistants (ASST)
Any Downsides to xTRACT?

- There is NO submit feature

- Once you finalize your data tables you will still need to print, attach and submit with the appropriate RPPR or to your application. This is NOT done automatically in the system.

- Upload features for batches of data will be introduced gradually.
  - Funding Sources is the only batch upload currently available
Implementation of xTRACT

• For RPPRs due prior to December 1, 2015, and new applications submitted for due dates prior to May 25, 2016, applicants are advised to continue to use previously issued training data table formats.

• New training data table formats must be used for RPPRs due December 1, 2015, and after and new applications submitted for due dates on or after May 25, 2016.

• Applicants may create tables for their applications and RPPRs either by using fillable tables in MS Word or via the xTRACT system.
In conjunction with the development of xTRACT, training data tables have also been revised:

- Reduce the number of tables from 12 to 8
- Minimize the reporting of individual-level information
- Table 5 will be combined with Table 2 as summary info
- Tables 7 and 8 will be combined as summary info
- Tables 9 and 10 eliminated
- Extend the tracking of trainee outcomes from 10 to 15 years
How do the new tables relate to the former table numbers?

<table>
<thead>
<tr>
<th>Content</th>
<th>Former Table</th>
</tr>
</thead>
<tbody>
<tr>
<td>Census of Participating Departments and Interdepartmental Programs</td>
<td>1</td>
</tr>
<tr>
<td>Participating Faculty Members</td>
<td>2 &amp; 5</td>
</tr>
<tr>
<td>NIH Training Grant &amp; Related Support Available</td>
<td>3</td>
</tr>
<tr>
<td>Grant Support of Participating Faculty Members</td>
<td>4</td>
</tr>
<tr>
<td>Publications</td>
<td>6</td>
</tr>
<tr>
<td>Applicants, Entrants &amp; their Characteristics</td>
<td>7 &amp; 8</td>
</tr>
<tr>
<td>Appointments to the Training Grant for Each Year of the Current Project Period (renewal/revision applications only)</td>
<td>11</td>
</tr>
<tr>
<td>Program Outcomes</td>
<td>12</td>
</tr>
</tbody>
</table>
NEW Data Table Changes

• List of Data Tables
  For New Applications

<table>
<thead>
<tr>
<th>Table #</th>
<th>Title of Table</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table 1.</td>
<td>Census of Participating Departments and Interdepartmental Programs</td>
</tr>
<tr>
<td>Table 2.</td>
<td>Participating Faculty Members</td>
</tr>
<tr>
<td>Table 3.</td>
<td>Federal Institutional Research Training Grant and Related Support Available to Participating Faculty Members</td>
</tr>
<tr>
<td>Table 4.</td>
<td>Research Support of Participating Faculty Members</td>
</tr>
<tr>
<td>Table 5.</td>
<td>Publications of Those in Training: Predoctoral</td>
</tr>
<tr>
<td>Table 6.</td>
<td>Applicants, Entrants, and their Characteristics for the Past Five Years: Predoctoral</td>
</tr>
<tr>
<td>Table 8.</td>
<td>Program Outcomes: Predoctoral</td>
</tr>
</tbody>
</table>
# NEW Data Table Changes

For Renewal or Revision Applications

<table>
<thead>
<tr>
<th>Table #</th>
<th>Title of Table</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table 1.</td>
<td>Census of Participating Departments and Interdepartmental Programs</td>
</tr>
<tr>
<td>Table 2.</td>
<td>Participating Faculty Members</td>
</tr>
<tr>
<td>Table 3.</td>
<td>Federal Institutional Research Training Grant and Related Support Available to Participating Faculty Members</td>
</tr>
<tr>
<td>Table 4.</td>
<td>Research Support of Participating Faculty Members</td>
</tr>
<tr>
<td>Table 5.</td>
<td>Publications of Those in Training: Predoctoral</td>
</tr>
<tr>
<td>Table 6.</td>
<td>Applicants, Entrants, and their Characteristics for the Past Five Years: Predoctoral</td>
</tr>
<tr>
<td>Table 7.</td>
<td>Appointments to the Training Grant for Each Year of the Current Project Period</td>
</tr>
<tr>
<td>Table 8.</td>
<td>Program Outcomes: Predoctoral</td>
</tr>
</tbody>
</table>
NEW Data Table Changes

- For RPPR
  - Table 8 only (was table 12)

<table>
<thead>
<tr>
<th>Table 8 A/B/C</th>
<th>Program Outcomes: Predoctoral/Short-Term/Postdoctoral</th>
</tr>
</thead>
</table>
NEW Data Table Changes

RPPR

• RPPRs - Provide updated information in Table 8A, 8B and/or 8C (previously table 12)

• Section B.4
  • Include Trainee Diversity Report
  • Paragraph on each trainee
    • See detailed instructions on what info to include
  • Upload Table 8 here (NOT 12)

• Other Requirements if applicable
  • Updated IRB Approvals
  • Biosketches for new mentors
    • Also address mentors that have left
Complete List of All NEW Data Tables

- Table 1. Census of Participating Departments and Interdepartmental Programs
- Table 2. Participating Faculty Members
- Table 3. Federal Institutional Research Training Grant and Related Support Available to Participating Faculty Members
- Table 4. Research Support of Participating Faculty Members
- Table 5A. Publications of Those in Training: Predoctoral
- Table 5B. Publications of Those in Training: Postdoctoral
- Table 5C. Publications of Those in Training: Undergraduate
Complete List of All NEW Data Tables (Cont.)

• Table 6A. Applicants, Entrants, and their Characteristics for the Past Five Years: Predoctoral
• Table 6B. Applicants, Entrants, and Their Characteristics for the Past Five Years: Postdoctoral
• Table 7. Appointments to the Training Grant for Each Year of the Current Project Period (renewal/revision applications only)
• Table 8A. Program Outcomes: Predoctoral
• Table 8B. Program Outcomes: Short-Term
• Table 8C. Program Outcomes: Postdoctoral
• Table 8D. Program Outcomes: Undergraduate
Data Tables

- **A** Tables = Predoctoral
- **B** Tables = Postdoctoral
- **C/D** Tables = Depends on table - Short-term or Undergraduate
### Data Tables

For RPPRs due on or after December 1, 2015 and applications using the SF424 (R&R) submitted on or after May 25, 2016, new training table formats must be used. See NOT-OD-16-007 for more information.

Blank Data Tables and Instructions and Sample Data Tables files are available for each of the situations listed below. These are designed to print best in landscape mode. The Blank Data Tables file provides fillable format pages.

#### Introduction

<table>
<thead>
<tr>
<th>Introduction to Data Tables: Read this first!</th>
<th>Date Posted</th>
<th>File Link/Format/Size</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10/09/2015</td>
<td>MS Word (53 KB) PDF (437 KB)</td>
</tr>
</tbody>
</table>

#### Data Tables

<table>
<thead>
<tr>
<th>Data Tables</th>
<th>Date Posted</th>
<th>Blank Data Tables File Link/Format/Size</th>
<th>Instructions and Sample Data Tables File Link/Format/Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Tables</td>
<td>10/09/2015</td>
<td>MS Word (71 KB)</td>
<td>MS Word (120 KB) PDF (311 KB)</td>
</tr>
<tr>
<td>All Training Tables (Undergraduate Programs)</td>
<td>10/09/2015</td>
<td>MS Word (52 KB)</td>
<td>MS Word (68 KB) PDF (114 KB)</td>
</tr>
<tr>
<td>New Predoctoral Training Submit tables: 1, 2, 3, 4, 5A, 6A, 8A</td>
<td>10/09/2015</td>
<td>MS Word (40 KB)</td>
<td>MS Word (101 KB) PDF (570 KB)</td>
</tr>
</tbody>
</table>

---

How to Login into xTRACT

1. Log in to eRA Commons
2. If you have the appropriate delegation you will see xTRACT on the toolbar, if not you do not have the proper access
xTRACT Homepage

4 navigation tabs
1. New Applications
2. Training Grants
3. Persons
4. Institution Data

Welcome to xTRACT!

xTRACT may be used to prepare data tables for submission with NIH and other Public Health Service agency institutional research training grant applications and progress reports.

For FY 2016, xTRACT is available on a pilot basis for T32, TL1, T90/R90, and T15 training grants, to create data tables for Research Performance Progress Reports due December 1, 2015 or later and applications submitted for the May 25, 2016 due date and after.
New Application
Initiate RTD for New Application

1. Select the **New Applications** tab.
2. Select the **Initiate RTD for New Application** link.
3. Enter the fields as displayed on the Prepare New **Research Training Dataset** (RTD) screen.
   1. Project Title (required)
   2. Description
   3. FOA
   4. Institution (read only)
4. Click Save
If you have already *initiated* an RTD, you can **search** for the RTD
1. Select **Search RTD for New Applications**
2. **Enter** search parameters to narrow the results
   - New Data Set Identifier (assigned when you initiated the RTD)
   - PD/PI Last Name
   - New Data Set Project Title

*use percent sign (%) as a wildcard in search fields as needed*
# New Application

## Search RTD for New Application

*Actions:
1. **Prepare RTD for New Application**
2. View Training Tables
3. Unfinalize (PI and ASST)

### New Applications

| Search RTD for New Applications
| Initiate RTD for New Application |

### Search Research Training Data Sets for New Applications

- **New Data Set Identifier**
- **PDI/PI Last Name**
- **New Data Set Project Title**

You can perform a wildcard search by using the "%" character, for example: abcd% or %abcd% or ab%cd%

### New RTDs

<table>
<thead>
<tr>
<th>1 - 2 of 2 records, Page 1 of 1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Data Set Identifier</strong></td>
</tr>
<tr>
<td>58927</td>
</tr>
<tr>
<td>69314</td>
</tr>
</tbody>
</table>

*The links available in the Action column will vary depending on the role of the user (whether they have edit or view privileges) and the status of the RTD.
Search for Training Grants

1. Select the **Training Grants** Tab
   - Enter search parameters such as type, **T32 is default Activity Code**, IC Code, Serial Number
   - Or you can just click **Search**

These records are limited by the privileges associated with your account. If no programs meet the entered criteria, the following message displays: *Nothing found to display*
Search for Training Grants

The **action** column on the right has several options for different tasks. *These tasks are limited to the role associated to your account.*

**You may see all or some of the following links:**

- Prepare for RPPR
- Continue for RPPR
- Prepare for Revision
- Continue for Renewal
- View Tables
- Unfinalize

[Image of a table showing search results for training grants with colored circles highlighting specific action options.]
Import from CareerTrac?

- This functionality is in a pilot stage for a limited number of grants. For those grants participating in the pilot, the option to import CareerTrac data will be provided at the RTD initiation, for a renewal, a revision, or a Research Performance Progress Report (RPPR).

- The functionality may be expanded in the future for a broader range of grants.
Import from CareerTrac

- If xTRACT determines that CareerTrac information is available for a grant at time of RTD initiation, for a renewal, a revision, or a RPPR, a pop-up screen displays asking if the data should be imported.
Import from CareerTrac

- The CareerTrac data included in the pre-population:
  - Research Project Titles
  - Degrees
  - Employments
  - Mentor Relationships
  - Publications
New Application
Prepare RTD for a New Application

Maintain sections of the RTD:

- Basic Information
- Participating Departments/Programs
- Training Support & Summary
- Participating Faculty

- Participating Students
- Applicants and Entrants
- Preview PDF
- Finalize RTD
New Application
Basic Information

**Basic Information** section includes:

- New Data Set Identifier (read only)
- Project Title
- PI
- Description
- FOA
- Institution (read only)
New Application
Add an additional PI

Use the *Add PI* button to include any **additional** PIs
Do not add Mentor’s here, add them under “Participating Faculty”
New Application
Add Department (Table 1)

Located under Participating Departments/Programs
New Application
Search for Departments (Table 1)

Remember to use percent sign (%) as a wildcard in search field
## New Application

### Add Programs (Table 1)

<table>
<thead>
<tr>
<th>xTRACT Info</th>
<th>New Applications</th>
<th>Training Grants</th>
<th>Persons</th>
<th>Institution Data</th>
</tr>
</thead>
</table>

### New Applications
- Search RTD for New Applications
- Initiate RTD for New Application

### RTD
- Basic Information
- Participating Departments/Programs
  - Training Support & Summary
  - Participating Faculty
  - Participating Students
  - Applicants and Entrants
  - Preview PDF
  - Finalize RTD

---

**Prepare Research Training Dataset (RTD) for New Application**

**New RTD:** 69314 Pride & Prejudice and the Human Psyche

**PD/PI:** Austen, Jane (Contact)

---

**Participating Departments and Programs**

- Add Departments
- Add Programs

---

Participating Departments and Programs have not been added to the RTD yet and are needed to prepare the RTD for a new application.

---

**UC San Diego Health Sciences**
New Application
Participating Departments and Programs (Table 1)

Update the Census information as necessary

```
<table>
<thead>
<tr>
<th>New Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search RTD for New Applications</td>
</tr>
<tr>
<td>Initiate RTD for New Application</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>RTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Information</td>
</tr>
<tr>
<td>Participating Departments/Programs</td>
</tr>
<tr>
<td>Training Support &amp; Summary</td>
</tr>
<tr>
<td>Participating Faculty</td>
</tr>
<tr>
<td>Participating Students</td>
</tr>
<tr>
<td>Applicants and Enrollees</td>
</tr>
<tr>
<td>Preview PDF</td>
</tr>
<tr>
<td>Finalize RTD</td>
</tr>
</tbody>
</table>

Prepare Research Training Dataset (RTD) for New Application

New RTD: 69314 Pride & Prejudice and the Human Psyche
PD/PI: Austen, Jane (Contact)

Participating Department/Program Detail 1
HEALTH MANAGEMENT AND POLICY/SCHOOL OF PUBLIC HEALTH

Census
Faculty
Total: 0
Participating: 0

Predoctorates
Total: 0
Supported by any HHS Training Award: 0
Students with Participating Faculty: 0
Eligible Students with Participating Faculty: 0

Postdoctorates
Total: 0
Supported by any HHS Training Award: 0
Postdocs with Participating Faculty: 0
Eligible Postdocs with Participating Faculty: 0
```

Save and Close
Clear

UC San Diego
Health Sciences
New Application
Training Support & Summary (Table 3 & 6)

Summary (top section)
is in **read-only** format

The **Average Grant Support per Participating Faculty** Member is the *mean* of the Current Year Direct Costs in Research Support for each Faculty member.

The total number of positions represent the sums of the positions entered for each Institution Training Grant.
New Application
Institutional Training Support Detail (Table 3)

Select **Add Institutional Training Support**

<table>
<thead>
<tr>
<th>Training Support &amp; Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Grant Support per Participating Faculty Member</td>
</tr>
<tr>
<td>Total Number of Predoc Positions</td>
</tr>
<tr>
<td>Total Number of Postdoc Positions</td>
</tr>
<tr>
<td>Total Number of Short-Term Positions</td>
</tr>
</tbody>
</table>

**Institutional Training Support Detail**

<table>
<thead>
<tr>
<th>NIH Sources of Support</th>
<th>Grant Title, Award Number, Project Period, PD/PI</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Really Great Sample Project Title, R01 NS12345-01, 02/2013 to 02/2014, Bennet, Elizabeth [Remove Edit]</td>
</tr>
</tbody>
</table>

**Census Totals**

<table>
<thead>
<tr>
<th>Faculty</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>0</td>
</tr>
<tr>
<td>Participating</td>
<td>0</td>
</tr>
<tr>
<td>Predoc</td>
<td></td>
</tr>
</tbody>
</table>
New Application
Adding Funding Sources (Table 3)

- Enter Support criteria such as PI last name and search funding sources
- Under Actions hit select to add source of support
- Use the edit and remove links to update as necessary
Number of Participating Faculty (Number Overlapping). Provide the total number of participating faculty members and, parenthetically, the number of participating faculty members who are also named in this application (overlapping faculty).
New Application
Participating Faculty (Table 2)

1. On the left hand menu select – Participating Faculty
2. To add faculty to the RTD, select the Add Faculty button.
New Application
Search for a Faculty Member (Table 2)

You must enter a Commons ID, Person ID, or Last Name to perform a search.

Select **add faculty** in the search display.
New Application Participating Faculty Detail (Table 2)

*Edit faculty screen*
- Use to update Faculty Member Data, Degrees, Research Support and Mentoring Record

Prepare Research Training Dataset (RTD) for New Application

New RTD: 69314 Pride & Prejudice and the Human Psyche
PD/PI: Austen, Jane (Contact)

Participating Faculty Detail
Bingley, Charles

FACULTY MEMBER DATA
- Commons User ID: DARCYPAL
- Email: Darcv@email.com
- Rank:
- Training Role(s): [Edit]

FACULTY DEGREE

RESEARCH SUPPORT

MENTORING RECORD
New Application
Participating Students (Table 5 & 8)

Use same sequence of steps as faculty module
Remember - You must enter a Commons ID, Person ID, -or- Last Name to perform a search.

Select the Edit link in the Actions column to edit the student detail
New Application
Participating Students (Table 5 & 8)
New Application
Applicants and Entrants (Table 6)

To enter Pre-doc and Post-doc applicants and entrants:
1. Enter the start year of the most recently completed academic year and click Submit

To change the most recently-completed academic, change the year entered and select Submit. When changing Academic years, any data entered for Applicant and Entrant Counts and Characteristics are retained and associated with the shifted year based on order of years (rather than previously specified year).
New Application
Predoctoral Example (Table 6)

For each Academic Year, update the Applicant and Entrant Counts and Characteristics appropriately.

Prepare Research Training Dataset (RTD) for New Application

New RTD: 69314 Pride & Prejudice and the Human Psyche
PD/PI: Austen, Jane (Contact)

|------------|-------------|-------------|-------------|-------------|-------------|---------|

Predoctoral Applicant and Entrant Counts and Characteristics

Counts

<table>
<thead>
<tr>
<th>Department or Program</th>
<th>Total Applicant Pool</th>
<th>Applicants Eligible for Support</th>
<th>NewEntrants to the Program</th>
<th>New Entrants Eligible for Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>College of Imagination</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department of Psychology</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pharmacology</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>School of Communication</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Characteristics

GPA

<table>
<thead>
<tr>
<th>Total Applicant Pool</th>
<th>Applicants Eligible for Support</th>
<th>New Entrants to the Program</th>
<th>New Entrants Eligible for Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mean GPA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lowest GPA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Highest GPA</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Research Experience
Select *Preview PDF*
Save and/or print the training tables

An *In Progress* watermark will be printed on the Training Table PDF until the RTD is *finalized*. 
New Application
Finalize RTD

Certain users have the ability to finalize the RTD for a training grant. Finalized RTDs are marked as **Final** and cannot be edited.

**To finalize an RTD**
1. Select the Finalize RTD link from the RTD links on the left side of the screen.
2. A confirmation message warns
   - *Are you sure you want to continue?*

**Unfinalize an RTD**
- Option is now available

1. Once you finalize, the RTD cannot be edited. Select the Back button if you do not wish to finalize.
2. Select the Continue button to finalize the RTD.
Prepare RTD for Renewal

• In addition to tables 1-6, & 8 you will need to complete table 7
  • Current appointments to the Training Grant for Each Year of the Current Project Period
Prepare RTD for RPPR

To access the screen:
1. Search for the training grant on the Search for Training Grants screen.
2. From the Action column of the search results, select the appropriate link to access the Prepare Research Training Dataset (RTD) for Research Performance Progress Report (RPPR) screen:
   - To initiate the RTD for the progress report: Select the Prepare for RPPR link.
   - To continue working on an initiated RTD: Select the Continue for RPPR link.
Prepare RTD for RPPR

Prepare Research Training Dataset (RTD) for Research Performance

Progress Report (RPPR)

RTD: 5T32AG001701-24 Ocular Implants: A New Way to See the Universe

PD/PI: FORGE, GEORGE

RTD Reporting Period: 07/01/2001 - 06/30/2016

Basic Information

UC San Diego Health Sciences
Prepare RTD for RPPR
Program Statistics
Persons Tab

Welcome to xTRACT!

xTRACT may be used to prepare data tables for submission with NIH and other Public Health Service and progress reports.

In this function you can:

• Search for a person
• Invite Person to create a Profile
• Maintain Profiles
• Create xTRACT Person/Trainee
Welcome to xTRACT!

xTRACT may be used to prepare data tables for submission with NIH and other Public Health Service agencies and progress reports.

In this function you can:
• Maintain Programs
• Maintain Funding Sources
• Create a New Program
• Create New Funding Sources
Batch Uploads

Upload Funding Sources

Please note the following when uploading your funding source data:

- The file must be tab-delimited, and each line of the file must include the following: Funding Source Project Title, Type of Funding Source, Funding Source End Date, Funding Source Description.
- For your convenience, a file template is available by clicking the link provided. The first row of the file template contains the accepted column headings and you may omit column headings if you wish. However, if column headings are used, they must match those found in the template.
- All data in the file will be validated upon upload of the file and the results will be presented on the screen. All validations must pass, before any data re-upload. The following validations will be applied:
  - The Funding Source Project Title and Type of Funding Source are required for each funding source and cannot be left blank.
  - Funding Source Project Title must be 200 characters or less.
  - Type of Funding Source must be one of the following values: "F" for Fellowship, "OT" for Other, "RA" for Research Assistantship, "RG" for Research Grant.
  - If provided, Funding Source Number must be 20 characters or less.
  - If provided, Funding Source Organization must be one of the following values: "NIH" for NIH, "FDN" for Foundation, "NSF" for National Science Foundation, University.
  - If Funding Source Start Date or Funding Source End Date are provided, each must be in the form of mm/yyyy or yyyy.
  - If Funding Source Description is provided, it must be 200 characters or less.
- If needed, click here for instructions on how to convert an existing Excel File to the Correct Upload Format.

Don't have an input file, but would like to download a template that illustrates the file format? You can download a template here.
NIH xTRACT Training Videos

Welcome to XTRACT Video
https://www.youtube.com/watch?v=wYkxJSVEqus&feature=youtu.be
# NIH xTRACT Training Videos

## xTRACT Features and Functions

<table>
<thead>
<tr>
<th>xTRACT Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>The xTRACT module allows applicants, grantees and assistants to create research training tables for progress reports and institutional training grant applications. This short video provides a high level overview of the functionality of xTRACT and the benefits it provides to you.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>xTRACT For RPPR</th>
</tr>
</thead>
<tbody>
<tr>
<td>This is the second in a series of video tutorials for xTRACT. xTRACT is used by Signing Officials, Principal Investigators, and Assistants to create training tables for application submission as well as for Research Performance Progress Reports (RPPR). This video tutorial demonstrates how to use xTRACT to prepare a training table, known as a Research Training Dataset (RTD) for an RPPR.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Video Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome to xTRACT</td>
</tr>
<tr>
<td>Transcript</td>
</tr>
<tr>
<td>Welcome to xTRACT</td>
</tr>
<tr>
<td>Transcript</td>
</tr>
</tbody>
</table>
NIH xTRACT Training Videos

Tutorial Page
https://era.nih.gov/era_training/era_videos.cfm#xTRACT

xTRACT Overview – Tutorial #1
https://www.youtube.com/watch?v=wYkxJSVEqus&feature=youtu.be

xTRACT for RPPR - Tutorial #2
https://www.youtube.com/watch?v=eynHTClqWXQ&feature=youtu.be
Summary

• Please note this is a new NIH system
  • There will be a learning curve, so start early with your tables and be patient!
• Release Notes by NIH published periodically
  • Fixes
  • New features
• Future enhancements
  • More batch loads in the works
Training Grant Website
Reports and Data

Reports available to assist with Data Tables completion:

• General Training Grants List (T Mechanisms)
• Training Grant Slots Awarded by Department
• Training Grant Slots Awarded by Program Director and Grant
• Training Grant Trainees by Award
• Training Grant Trainees by Department
• Training Grant Mentors by Award
• Overlapping Faculty by Award

https://pulse.ucsd.edu/departments/research-service-core/training-grants/reports-data/Pages/default.aspx
Training Grants – UCSD Contact

Jill I. Weller
Research Service Core
858.534.3933
jweller@ucsd.edu

Isabella Bryant-Parkinson
Research Service Core
858.822.3551
ibryantparkinson@ucsd.edu

Thank you and Questions