
Commons Version 2.20.0.0

FCOI, ESI and xTrain

Release Notes

General Information

xTrain User Guide

The *xTrain External User Guide* was posted to the Commons Support Page:
http://era.nih.gov/commons/commons_support.cfm

Enhancements

Early Stage Investigation (ESI)

Modify Commons Profile to allow users to enter Residency Information and store data

The Commons *Degrees* screen was modified to become *Degrees/Residence* allowing users to enter:

- The end of their Medical Residency training date
 - * Required field
 - * Format - MM/YYYY
- The Area of Medical Residency (Optional Field)

Figure 1: Add Residency Screen.

For more information regarding ESI and ESI Eligibility, click one of the following two links:

- <http://grants.nih.gov/grants/guide/notice-files/NOT-OD-09-033.html> - policy document
- http://grants1.nih.gov/grants/new_investigators/index.htm#defearlystage - background info

Commons Profile to Display Residency Info for All users and ESI Info for PI, IAR and Trainee & Delegates

The system will now display *Medical Residency* information for all users and will calculate *ESI Eligibility* information for users with PI, IAR, and Trainee roles and their Delegates roles on the *Degree/Residency* screen.

A new *Medical Residency* section was added to the *Degree* screen. This section contains:

- Area of Medical Residency
- End Date or Expected End Date of Medical Residency
- Early Stage Investigator Status
- End of Medical Eligibility Date
- A link to FAQ's for ESI Eligibility

Also note that you will have the following:

- The ability to Edit and/or Delete a Medical Residency record
- The ability to 'Add' new Medical Residency information

Note: The *Add New Residency* section will not be available if degree information is not entered.

Electronic Research Administration
eRA Commons
 Sponsored by National Institutes of Health
 Version: 2.0.2.2

Welcome YGORBAC-I_NCAA
 Institution: U.S. NATIONAL INSTITUTES OF HEALTH
 Authority: NCAA OFM CFIDE UPSPP CDEV

Home Admin Institution Profile Personal Profile Status eSNAP xTrain FSR Internet Use State Review Links Help
 Personal Information Home/Change Employment/Address Residency/Address **Degrees/Residency** Notifications Trainee-Specific

List of Degrees

Notes & Tips: Degrees

- Include all degrees completed or in progress.
- In addition to reporting, degree information is sometimes used to validate application information or populate system forms.
- Trainees - current information is critical as it can determine eligibility for certain types of appointments/awards and can affect stored levels.

Notes & Tips: Residency

- Enter your most recent Residency Information.
- If you have questions regarding ESI Eligibility information, follow this link: [ESI Eligibility Information](#)

Degrees 1 - 2 out of 2 records

Degree	Institution	Completion Date	Degree Completed?	Major	Action
B.S. BACHELOR OF ARTS	U	08/1989	Y		Edit Delete
M.D. DOCTOR OF EDUCATION	UMCP	12/2010	Y		Edit Delete

[Add New Degree](#)

Residency

Area of Residency	End Date of Expected End Date of Residency	Action	Early Stage Investigator Status	End of Eligibility Date
Oncology	12/2010	Edit Delete	Eligible	12/2010

[Add Residency](#)

Close

Figure 2: List of Degrees Screen.

Secure Payee Registration System (SPRS)

The location of the *Secure Payee Registration System* link was changed from the *Reviewer* screen to the *Residential Address* screen. Reviewers are now asked to enter their home address in the Residential Address screen in order to log into the SPRS.

Electronic Research Administration
eRA Commons
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Welcome NORANCA_UPSPR
Institution: OREGON HEALTH & SCIENCE UNIVERSITY
Authority: IR

2.20.1.1

Home Admin Institution Profile Personal Profile Status eSNAP Internet Assisted Review xTrain Links eRA Partners Help

Personal Information Race/Ethnicity Employments Reviewer Address **Residential Address** Degrees/Residency Publications Trainee-Specific

Residential Address ?

Notes:

- **Trainees:** Please provide the address where they can be reached by mail after completion of their program (i.e., permanent address).
- **Reviewers:** Until the section below is completed, the link to the Secure Payee Registration System (SPRS) will not be available.

* indicates required field

Residential Address

Line 1:*	<input type="text"/>	City:*	<input type="text"/>
Line 2:	<input type="text"/>	State:*	<input type="text"/>
Line 3:	<input type="text"/>	Zip Code:*	<input type="text"/>
Line 4:	<input type="text"/>	Country:*	<input type="text" value="UNITED STATES"/>
Phone:*	<input type="text"/>	Fax:	<input type="text"/>
E-mail:*	<input type="text"/>	Secure Payee Registration System	

Submit Reset Cancel

Figure 3: Residential Address Screen with Secure Payee Registration System link

The new system requires reviewers to log in to eRA Commons (<https://commons.era.nih.gov/commons/>) with their user name and password, and update their Personal Profile with the following information: residential address, phone number, and email; and link to the Secure Payee Reimbursement System (SPRS) to enter social security number, bank routing number, and bank account number. Please follow the step-by-step instructions at <http://grants.nih.gov/grants/peer/peer.htm> for registration. Only users with the Internet Assisted Review (IAR) role will be able to view the link and log into the SPR system. All required fields, including the email address, must be filled in.

Financial Conflict of Interest (FCOI)

Note added to let user know that an Attachment is optional after the initial Save.

A note was added to the *Financial Conflict of Interest – Initiate* screen to let you know that an attachment is optional after the initial Save.



Electronic Research Administration
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Version 2012

Welcome: jaco2_FCOI
Institution: DUKE UNIVERSITY
Authority: FCOI [Logout](#)

Home Admin Personal Profile **FCOI** Links eRA Partners Help

Search Initiate

Financial Conflict of Interest - Initiate

*Indicates required field

The new FCOI system is currently being piloted by Federal Demonstration Partnership (FDP) members submitting information to NIH only.

Notes:

- New FCOI Notification can be prepared and saved for further editing until 'Save and Submit' button is used to send to agency.
- Opportunity to provide Comments (up to 2000 characters) is available after clicking 'Save' or 'Save and Submit' button.
- To access FCOIs created previously use the 'Search' tab on the FCOI menu bar.

FCOI Form

Type	Activity	IC Code*	Serial Number*	Support Year*	Suffix Code	PD/PI or Coated PD/PI
Grant Number: <input style="width: 100%;" type="text"/>						
Name of Investigator with Conflict:						
Last Name*	First Name*	Middle Name				
<input style="width: 100%;" type="text"/>			<input style="width: 100%;" type="text"/>			
Sub-Recipient Report?*						
<input checked="" type="radio"/> No <input type="radio"/> Yes			Sub-Recipient Institution Name			
<input type="text"/>			<input style="width: 100%;" type="text"/>			
FCOI Action:*						
<input type="button" value="Pick an action"/>						

This section will be available for PDF document upload after the initial save. *Attachments are optional

Upload FCOI documents

File Name: Description:

Document Name	Description	Upload Date	Action

Figure 4: Financial Conflict of Interest – Initiate Screen.

Fixes

Financial Conflict of Interest (FCOI) Fixes

FCOI form Grant Number Activity Field is case sensitive.

The Initiate FCOI was inputting all of the records, not just the required information. This was causing the following error message: *Grant was not found or not awarded*. What was expected was that a new FCOI record would be initiated. Now, the FCOI grant number field works correctly when the entire record is added.

xTrain Fixes

When an account has both the BO and ASST roles, BO cannot see the Process TN link

When a user had both the BO and the ASST role, there was a coding issue where it did not display the *Process TN* link. As a result, these applications were inaccessible. This has been resolved.

Termination Notice - BO no longer exists but email still sent to them

An issue was occurring that when a *Termination Notice* was created and the BO didn't exist any longer, they would still be sent an email. The database was updated to fix this problem in the short term. Now, when a BO account is deleted, the user will no longer receive a Termination email.

For both 2271 and TN Original document should not be altered when Amended

For both the 2271 form and the TN, the original document was being altered when it was amended. When an early TN is created, the original 2271 should not be updated; all changes should be stored and displayed in Commons in the Amendment section. This has been resolved. For both the 2271 form and the TN, the original document will no longer be altered when it is amended.

Personal information was being pulled into the 2271 form from the profile record

In cases with early termination, personal information for the trainee should be pulled in to the 2271 form from the historical record rather than the Profile record. This has been fixed so that automatic population of the Trainee information will come from the original nomination record and not from the trainee's profile record.

For early TN and 2271, Amendment section not including stipend amount and total support

For early TN and 2271, the *Amendment* section should include the original stipend amount and the new stipend amount. It should also include the original total support amount and the new total support amount. Total support amount includes: Tuition fees and Travel

Fees in addition to stipend amount. The early TN and 2271 *Amendment* section now includes the original stipend amount and the new stipend amount. The original form will not be altered.

Existing early TN and Amendment records and PDF files show incorrect stipend amount

Currently, early TN records have the adjusted stipend amount saved to the total support amount (including travel and tuition fees). The *Total Support Amount* needs to be changed back to *Original Total Support Amount* (Section 20 on the form). This has been fixed so that all TN *Amendment* records and PDFs affected will now show the correct stipend amount.