



Electronic Research Administration
A program of the National Institutes of Health

Extramural Trainee Reporting and Career Tracking (xTRACT) User Guide

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1 What is xTRACT?

Extramural Trainee Reporting and Career Tracking (xTRACT) is a module within eRA Commons used by applicants, grantees, and assistants to create research training tables for inclusion in progress reports and institutional training grant applications.

Because xTRACT is integrated with Commons it is 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. xTRACT also allows the 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 subsequent training table submissions.

If you are a Signing Official (SO), Principal Investigator (PI), or assistant (ASST) in Commons, you have access to the xTRACT module.

IMPORTANT: xTRACT is a tool for creating training tables. Tables generated in xTRACT must be attached to and submitted with the appropriate progress report or application. There is no *Submit* feature in xTRACT.

POLICY: Guide Notice [NOT-OD-16-007](http://grants.nih.gov/grants/guide/notice-files/NOT-OD-16-007.html) (<http://grants.nih.gov/grants/guide/notice-files/NOT-OD-16-007.html>)

2 Initiate an RTD for New Application

To initiate an RTD for a 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.
Required fields are marked with an asterisk (*).
 - **Project Title** (required)
 - **Description**
 - **FOA**
 - **Institution** (required)
4. Select the **Save** button.

The screenshot displays the xTRACT web application interface. At the top, there is a navigation bar with links: Home, Admin, Institution Profile, Personal Profile, Status, RPPR, Internet Assisted Review, xTrain, xTRACT, Admin Supp, and eRA Partners. Below this is a secondary navigation bar with links: xTRACT Info, New Applications, Training Grants, Persons, and Institution Data. The main content area is titled 'New Applications' and contains two links: 'Search RTD for New Applications' and 'Initiate RTD for New Application', with the latter circled in red. To the right, the 'Prepare New Research Training Dataset (RTD)' form is visible. It includes a header with a help icon and a 'Back to search results' link. The form has a section for '* Required field(s)' and contains the following fields: '* Project Title' (text input), 'Description' (text area), 'FOA' (text input), and '* Institution' (text input with the value 'UNIVERSITY OF IMAGINATION'). At the bottom of the form are three buttons: 'Save', 'Cancel', and 'Clear'.

Figure 1: Initiate RTD for New Application Link

You will see a message at the top of the screen confirming that your RTD has been initiated.

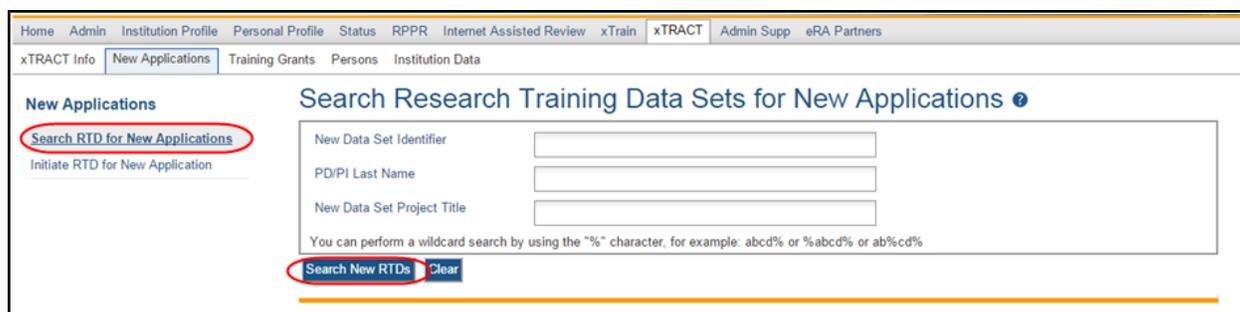
3 Search RTD for New Applications

To search for RTDs for new applications:

1. Navigate to the **New Applications** tab.
2. Select the **Search RTD for New Applications** link to display search parameters.
3. Enter search parameters to narrow the results.
 - **New Data Set Identifier**
 - **PD/PI Last Name**
 - **New Data Set Project Title**

Tip: You can use the percent sign (%) as a wildcard at the start, end, and middle of your criteria.

4. Select the **Search New RTDs** button.



The screenshot shows the xTRACT web application interface. The top navigation bar includes links for Home, Admin, Institution Profile, Personal Profile, Status, RPPR, Internet Assisted Review, xTrain, xTRACT, Admin Supp, and eRA Partners. The main content area is titled "Search Research Training Data Sets for New Applications". On the left, there is a "New Applications" section with a link "Search RTD for New Applications" circled in red. Below this link is the text "Initiate RTD for New Application". The main search area contains three input fields: "New Data Set Identifier", "PD/PI Last Name", and "New Data Set Project Title". Below these fields is a note: "You can perform a wildcard search by using the \"%\" character, for example: abcd% or %abcd% or ab%cd%". At the bottom of the search area, there is a "Search New RTDs" button circled in red and a "Clear" button.

Figure 2: Searching for New Applications

New RTDs display in a table on the screen. If no matches are found, the following message appears: *Nothing found to display.*

The information presented in the results includes:

- New Data Set Identifier
- Project Title
- PD/PI Name
- Status
- Action links

New Applications

[Search RTD for New Applications](#)

Initiate RTD for New Application

Search Research Training Data Sets for New Applications ?

New Data Set Identifier

PD/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

1 - 2 of 2 records, Page 1 of 1

New Data Set Identifier	Project Title	PD/PI Name	Status	Action
58927	The Age of Anxiety Disorders	Auden, W.H.	In Progress	Prepare RTD for New Application
69314	Pride & Prejudice and the Human Psyche	Austen, Jane (Contact) Bennet, Elizabeth Darcy, Fizzwilliam	In Progress	Prepare RTD for New Application

Figure 3: RTDs for New Applications - Search Results

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 (whether it is in progress or finalized). Select the appropriate link for your action. Potential links include:

- **Prepare RTD for New Application**
- **View Training Tables**

Use this link to view the training tables for a New Application. The link is available once the RTD has been marked as Final.

- **Unfinalize New Application**

This link is available to users (PD/PIs and their ASSTs) with the permission to unfinalize an RTD that has been marked as Final.

4 Search for Training Grants

Use the *Search for Training Grants* feature to prepare RTDs for use in revisions and renewals or in Research Performance Progress Reports (RPPR).

1. Select the **Training Grants** tab.

The *Search for Training Grants* screen displays with search parameters for **Grant Number** and **PD/PI Last Name**.

2. *Optional:* Enter the appropriate search parameters. This is not required.

Grant Number

- **Type**
- **Activity Code**

T32 is the default value.

- **IC Code**
- **Serial Number**
- **Support Year**
- **Suffix**

PD/PI Last Name: Enter the last name of the PD/PI associated with the project.

Tip: You may use the percent sign (%) as a wildcard at the start, at the end, or in the middle of your criteria.

3. Select the **Search** button.

Figure 4: Searching Training Grants

All records matching the entered search criteria (if any) display in the hit list below the search criteria. 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 to work on or view Research Training Datasets (RTDs) ?

Grant Number	Type	Activity Code	IC	Serial Number	Support Year	Suffix
<input type="text"/>	<input type="text"/>	<input type="text" value="T32"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

PD/PI Last Name

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

1 - 50 of 69 records, Page 1 of 2

Grant Number	Grant Status	PI Name	Project Title	Status	Action
1T32GM123456-01	Pending	Lee, Harper (Contact) Capote, Truman	Training Program in Translational Research	In Progress (RPPR) Not Started (Revision) Not Started (Renewal)	Continue for RPPR
1T32HL123456-01A1	Pending	Austen, Jane	Training Program in Translational Cardiovascular Research and Entrepreneurship	Not Started (RPPR) Not Started (Revision) Not Started (Renewal)	Prepare for RPPR
5T32AG012345-07	Pending	Doyle, Arthur Conan	Interdisciplinary Research Training on Health and Aging	Final (RPPR) Not Started (Revision) Not Started (Renewal)	View RPPR Tables
5T32DC001234-05	Awarded	Hardy, Thomas	Early Stage Training in the Neurosciences	In Progress (Revision) Not Started (Renewal)	Continue RTD for Revision Prepare for Renewal

Figure 5: Searching Training Grants - Results

The training grants are presented in a table and include the following related information:

- **Grant Number**
- **Grant Status**
- **PI Name**
- **Project Title**
- **Status**
- **Action**

The **Action** column presents the options to perform several 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**

Use this link to prepare the RTD for the progress report. The link appears when the training grant is awarded, the next support year is pending, and RTD preparation for the RPPR has not been initiated.

- **Continue for RPPR**

Use this link to continue an RTD already in progress. The link appears when the RTD for the progress report has been initialized but is not final.

- **Prepare for Revision**

Use this link to prepare the RTD for a revision. The link appears when the training grant is awarded and an RTD preparation for a revision has not been initiated.

- **Continue for Revision**

Use this link to continue an RTD already in progress. The link appears when the RTD for a revision has been initialized but is not final.

- **Prepare for Renewal**

Use this link to prepare the RTD for a renewal. The link appears when the training grant is awarded and an RTD preparation for a renewal has not been initiated.

- **Continue for Renewal**

Use this link to continue an RTD already in progress. The link appears when the RTD for a renewal has been initiated but is not final.

- **View Tables**

Use this link to view the training tables for an RPPR, Revision, or Renewal. The link is available once the RTD has been marked as final.

- **Unfinalize**

This link is available to users having the permission to unfinalize an RTD for an RPPR, Revision, or Renewal that has been marked as Final.

5 Prepare RTD for a New Application

Use the links listed under **RTD** on the left side of the screen to maintain the specific sections of the RTD:

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

Selecting the links above opens the specific section of the RTD. From within, you can add, edit, and/or remove data.

The screenshot displays the 'Prepare Research Training Dataset (RTD)' interface. On the left, a sidebar menu under the 'RTD' heading lists several options: 'Basic Information', 'Participating Departments/Programs', 'Training Support & Summary', 'Participating Faculty', 'Participating Students', 'Applicants and Entrants', 'Preview PDF', and 'Finalize RTD'. The 'Basic Information' option is highlighted with a red rounded rectangle. The main content area shows the details for a 'New RTD: 69314 Pride & Prejudice and the Human Psyche' with 'PD/PI: Austen, Jane (Contact)'. Below this, the 'Basic Information' section is displayed, featuring a table of fields:

* Required field(s)	
New Data Set Identifier	69314
* Project Title	Pride & Prejudice and the Human Psyche
PI(s)	Austen, Jane (Contact) Bennet, Elizabeth (remove) S Darcy, Fitzwilliam (remove) S
Add PI	
Description	Sample and fictitious project description

Figure 6: RTD Links for New Applications

5.1 Basic Information (New Application)

The Basic Information section includes:

- **New Data Set Identifier** (read only)
- **Project Title**
- **PI(s)**

Added PIs are read only. Use the **Add PI** button to include additional PIs. Links are also available for removing a PI and setting the PI as the Contact. Refer to the steps below.

- **Description**

The option description field is provided so that you can add a meaningful description of the purpose of the RTD. This information is used only within xTRACT and is not part of the data submitted with the training grant application.

- **FOA**

For informational purposes only. There are no restrictions for submitting an RTD based on the FOA.

- **Institution** (read only)

Update the fields as appropriate and select the **Save** button.

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)

Basic Information ⓘ

* Required field(s) [Back to search results](#)

New Data Set Identifier: 69314

* Project Title:

PI(s): Austen, Jane (Contact)
Bennet, Elizabeth ([remove](#)) [Set as Contact](#)
Darcy, Fitzwilliam ([remove](#)) [Set as Contact](#)
[Add PI](#)

Description:

FOA:

* Institution: UNIVERSITY OF IMAGINATION

[Save](#) [Cancel](#) [Clear](#)

5.2 Add PI

To add a PI from a search:

1. Select the **Add PI** button.

Prepare Research Training Dataset (RTD) for New Application

New RTD: 69314 Pride & Prejudice and the Human Psyche

PD/PI: Austen, Jane (Contact)

Basic Information ⓘ

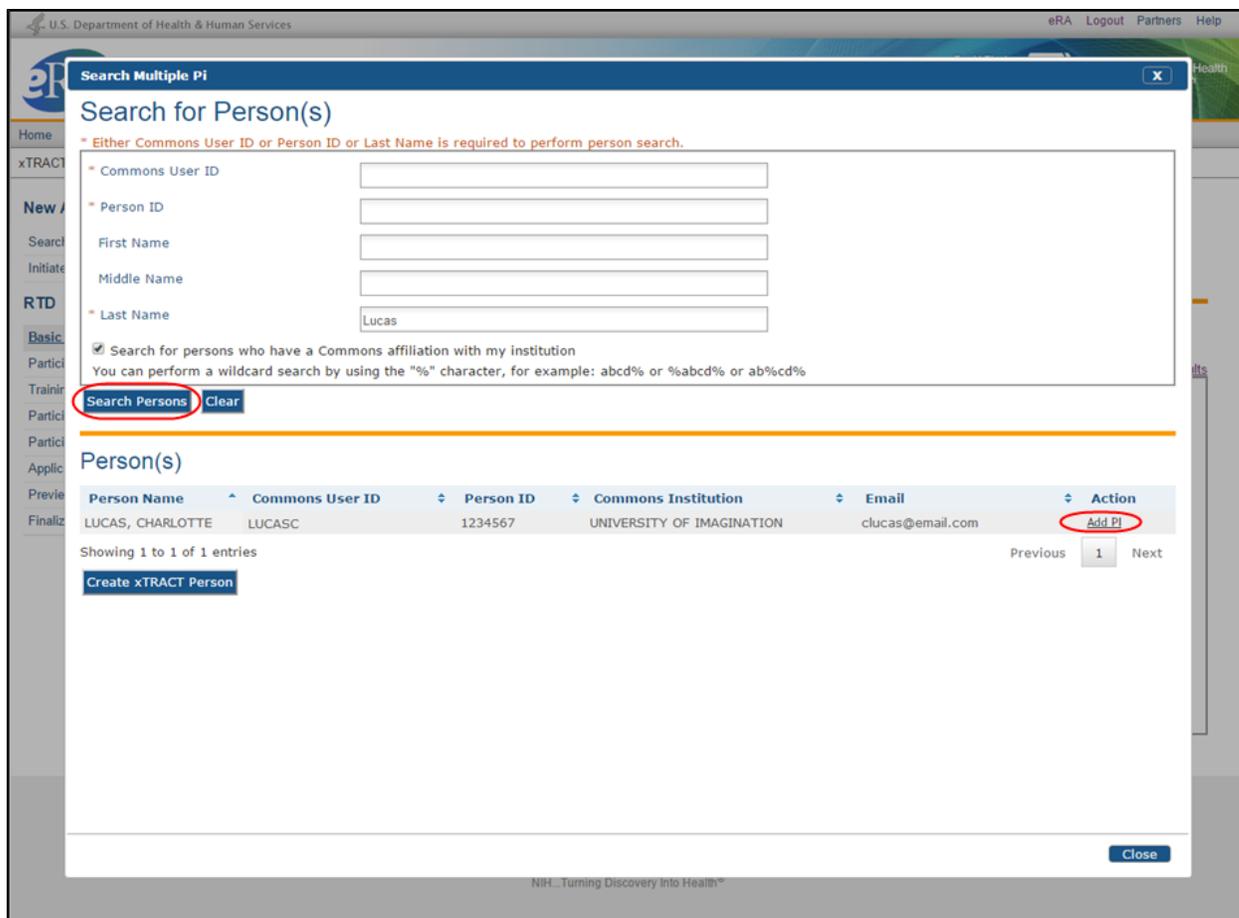
* Required field(s) [Back to search results](#)

New Data Set Identifier	69314
* Project Title	<input type="text" value="Pride & Prejudice and the Human Psyche"/>
PI(s)	Austen, Jane (Contact) Bennet, Elizabeth (remove) Set as Contact Darcy, Fitzwilliam (remove) Set as Contact Add PI
Description	<input type="text" value="Sample and fictitious project for demonstration purposes only..."/>
FOA	<input type="text"/>
* Institution	UNIVERSITY OF IMAGINATION

2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

NOTE: You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

3. All matching records display in the **Person(s)** table. Only persons with a Commons role of PI will be returned in the search. Select the **Add PI** link in the **Action** to add the person.



4. Repeat the steps to add other PIs. Added PIs appear in the Person(s) list with the word *Added* shown in the **Action** column.
5. Use the **Close** button to close the search screen.

5.3 Set as Contact

If your application has multiple PIs, you can set a PI as the Contact. From the **Basic Information** section of the RTD, find the PI you wish to set as Contact. Select the **Set as Contact** link.

5.4 Remove a PI

Use the **(remove)** link located next to a PI 's name in the **Basic Information** section of the RTD to remove that PI from the record. This link only appears if multiple PIs exist.

Select **OK** to confirm the removal when prompted.

5.5 Participating Departments and Programs (New Application)

Use this section to add/remove departments and programs.

5.6 Add Departments

1. Select the **Add Departments** button.

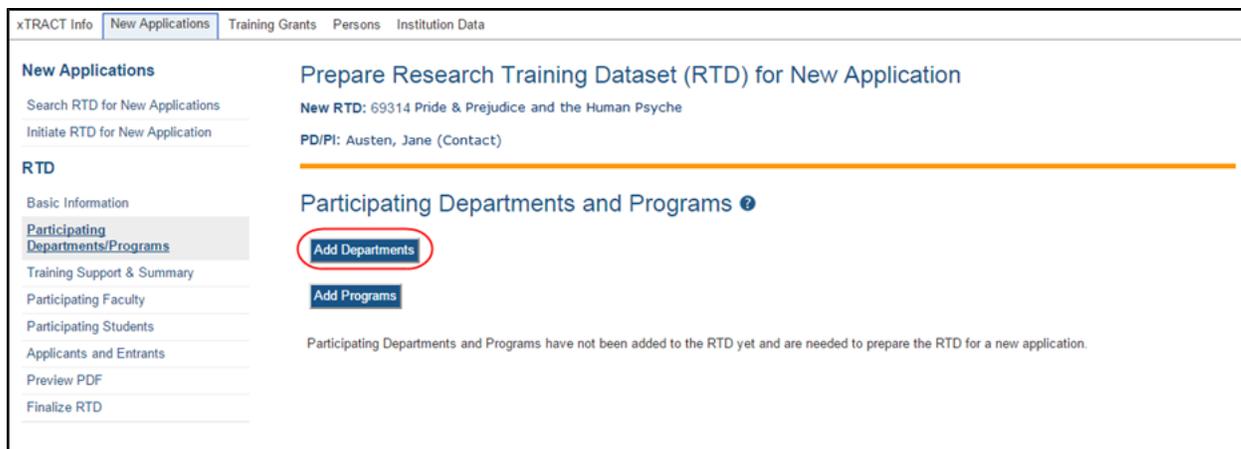


Figure 7: Adding Departments

2. Select the **Search Departments** button to search for departments in the Institution. You can narrow down the results by first entering the **Department Name**.

Tip: You may use the percent sign (%) as a wildcard at the start, at the end, or in the middle of your criteria.

3. Find the appropriate department in the results list and select the corresponding **Add Department** link from the **Action** column. Major Components are also displayed with the Department to differentiate among departments with the same name in different units of the organization.

The **Action** column updates to show *Added* for the added department. You can repeat the step to **Add Department** for as many departments as necessary.

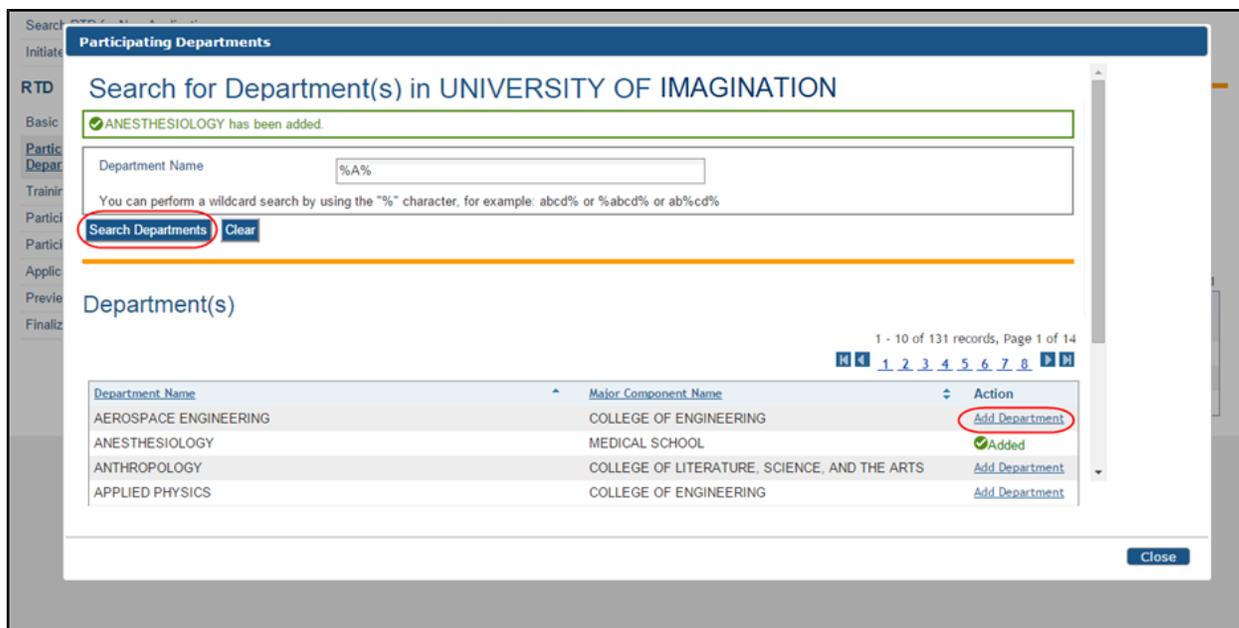


Figure 8: Searching for Departments

4. Select the **Close** button to close the screen.

The *Prepare RTD* screen updates to show the added department(s) in a table. Added programs and departments display in the same table. The **Actions** column includes links for removing and editing the programs and departments.

5.7 Add Programs

1. Select the **Add Programs** button.

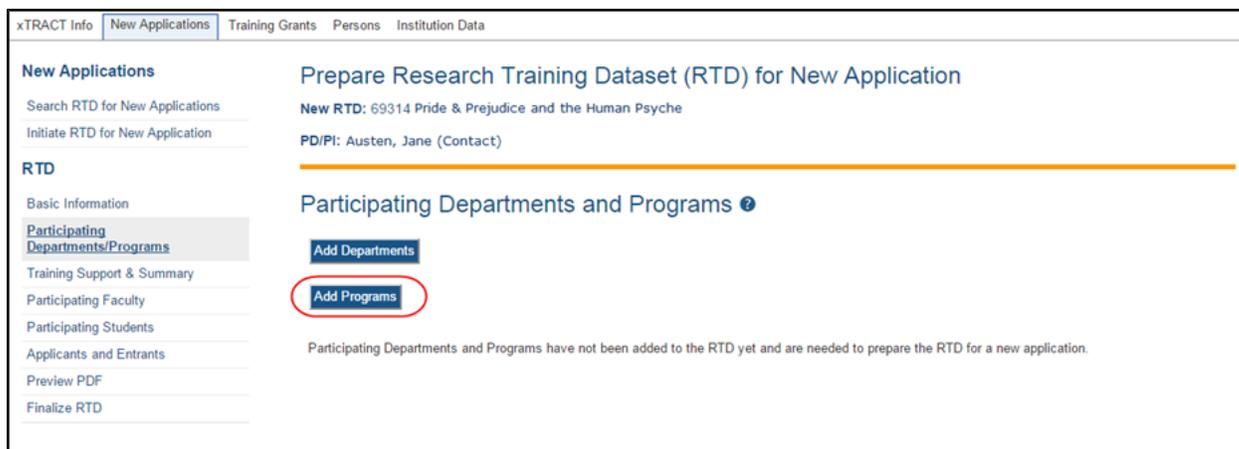


Figure 9: Add Programs Button

2. Select the **Search** button. You can narrow down the results by first entering the **Program Name** and/or **Program Description**.

Tip: You may use the percent sign (%) as a wildcard at the start, at the end, or in the middle of your criteria.

3. Find the appropriate program in the results list and select the corresponding **Add Program** link from the **Action** column.

The **Action** column updates to show *Added* for the added program. You can repeat the step to **Add Program** for as many programs as necessary.

To add a Program not available in the search results, select **Create Program**. Add **Program Name** (required) and **Program Description** (optional) and select **Create Program and Add to New Application**.

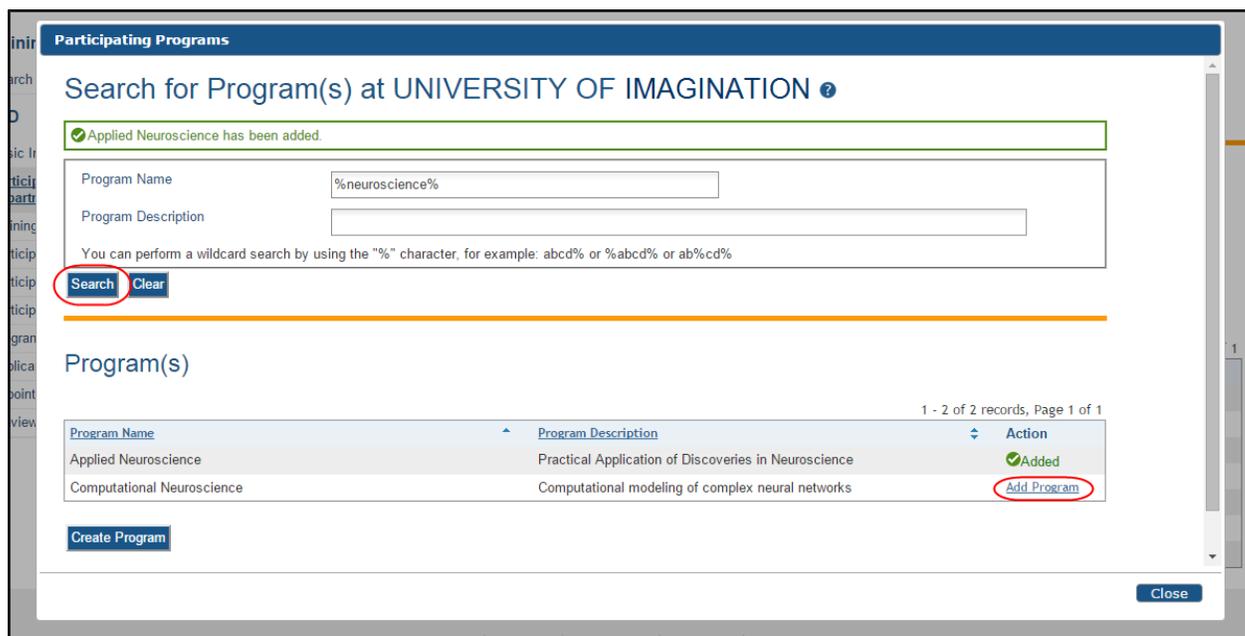


Figure 10: Searching for Programs

4. Select the **Close** button to close the screen.

The *Prepare RTD* screen updates to show the added program(s) in a table. Added programs and departments display in the same table. The **Actions** column includes links for removing and editing the programs and departments.

5.8 Edit Departments & Programs

To edit a program or department, select the **Edit** link from the **Actions** column.

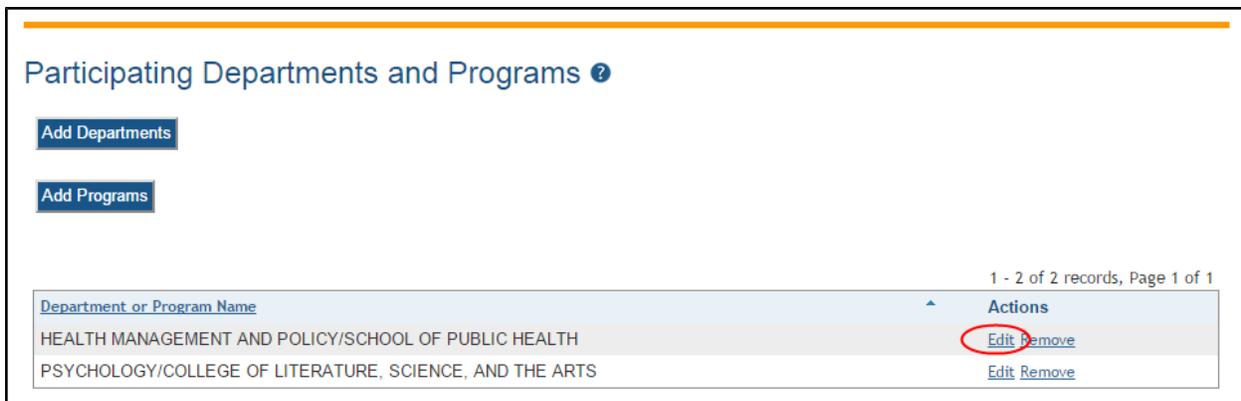


Figure 11: Edit Link for Programs and Departments

Update the Census information as necessary.

Faculty

- Total
- Participating

Predocorates

- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty

Postdoctorates

- Total
- Supported by any HHS Training Award
- Postdocs with Participating Faculty
- Eligible Postdocs with Participating Faculty

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 Department/Program Detail

HEALTH MANAGEMENT AND POLICY/SCHOOL OF PUBLIC HEALTH

Census

Faculty

Total
Participating

Predoctoates

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

Postdoctorates

Total
Supported by any HHS Training Award
Postdocs with Participating Faculty
Eligible Postdocs with Participating Faculty

[Save and Close](#) [Clear](#)

Figure 12: Participating Department/Program Detail

Select the **Save and Close** button to save the information.

5.8.1 Participating Department/Program Detail (New Application)

5.9 Edit Departments & Programs

To edit a program or department, select the **Edit** link from the **Actions** column.

Participating Departments and Programs

[Add Departments](#)

[Add Programs](#)

1 - 2 of 2 records, Page 1 of 1

Department or Program Name	Actions
HEALTH MANAGEMENT AND POLICY/SCHOOL OF PUBLIC HEALTH	Edit Remove
PSYCHOLOGY/COLLEGE OF LITERATURE, SCIENCE, AND THE ARTS	Edit Remove

Figure 13: Edit Link for Programs and Departments

Update the Census information as necessary.

Faculty

- Total
- Participating

Predotorates

- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty

Postdoctorates

- Total
- Supported by any HHS Training Award
- Postdocs with Participating Faculty
- Eligible Postdocs with Participating Faculty

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
PI/PI: Austen, Jane (Contact)

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

Census

Faculty

Total	<input type="text" value="0"/>
Participating	<input type="text" value="0"/>

Predotorates

Total	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Students with Participating Faculty	<input type="text" value="0"/>
Eligible Students with Participating Faculty	<input type="text" value="0"/>

Postdoctorates

Total	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Postdocs with Participating Faculty	<input type="text" value="0"/>
Eligible Postdocs with Participating Faculty	<input type="text" value="0"/>

Save and Close **Clear**

Figure 14: Participating Department/Program Detail

Select the **Save and Close** button to save the information.

5.10 Training Support & Summary (New Application)

Displays the read-only totals of the following:

- Average Grant Support per Participating Faculty Member
- Total Number of Predoc Positions
- Total Number of Postdoc Positions
- Total Number of Short-Term Positions

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.

Prepare Research Training Dataset (RTD) for New Application

New RTD: 69314 Pride & Prejudice and the Human Psyche

PD/PI: Austen, Jane (Contact)

Training Support & Summary ?

Average Grant Support per Participating Faculty Member	\$0
Total Number of Predoc Positions	0
Total Number of Postdoc Positions	0
Total Number of Short-Term Positions	0

Institutional Training Support Detail

NIH Sources of Support

Grant Title, Award Number, Project Period, PD/PI

Really Great Sample Project Title , R01NS123456-01, 02/2013 to 02/2014,
Bennet, Elizabeth [Remove](#) [Edit](#)

[Add Institutional Training Support](#)

Census Totals

Faculty [Edit](#) Please provide numbers for unique faculty members across the participating departments and interdepartmental programs.

Total	0
Participating	0

Predoc

Total	0
Supported by any HHS Training Award	0
Total Predoctorates with Participating Faculty	0
Eligible Students with Participating Faculty	0
TGE Predocs Supported by this Training Grant	0
Predocs Supported by this Training Grant (R90 Only)	0

Postdoc

Total	0
Supported by any HHS Training Award	0
Total Postdoctorates with Participating Faculty	0
Eligible Postdocs with Participating Faculty	0
TGE Postdocs Supported by this Training Grant	0
Postdocs Supported by this Training Grant (R90 Only)	0

Prepare Research Training Dataset (RTD) for Renewal

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche

PD/PI: Austen, Jane (Contact)

Training Support & Summary ?

Average Grant Support per Participating Faculty Member	\$0
Total Number of Predoc Positions	0
Total Number of Postdoc Positions	0
Total Number of Short-Term Positions	0

Institutional Training Support Detail

NIH Sources of Support

Grant Title, Award Number, Project Period, PD/PI

Really Great Sample Project Title , R01NS123456-01, 02/2013 to 02/2014,
Bennet, Elizabeth [Remove](#) [Edit](#)

[Add Institutional Training Support](#)

Census Totals

Faculty [Edit](#) Please provide numbers for unique faculty members across the participating departments and interdepartmental programs.

Total	0
Participating	0

Predoc

Total	0
Supported by any HHS Training Award	0
Total Predoctorates with Participating Faculty	0
Eligible Students with Participating Faculty	0
TGE Predocs Supported by this Training Grant	0
Predocs Supported by this Training Grant (R90 Only)	0

Postdoc

Total	0
Supported by any HHS Training Award	0
Total Postdoctorates with Participating Faculty	0
Eligible Postdocs with Participating Faculty	0
TGE Postdocs Supported by this Training Grant	0
Postdocs Supported by this Training Grant (R90 Only)	0

Prepare Research Training Dataset (RTD) for Revision

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche

PD/PI: Austen, Jane (Contact)

Training Support & Summary ?

Average Grant Support per Participating Faculty Member	\$0
Total Number of Predoc Positions	0
Total Number of Postdoc Positions	0
Total Number of Short-Term Positions	0

Institutional Training Support Detail

NIH Sources of Support	Grant Title, Award Number, Project Period, PD/PI
	Really Great Sample Project Title , R01NS123456-01, 02/2013 to 02/2014, Bennet, Elizabeth Remove Edit

Add Institutional Training Support

Census Totals

Faculty Edit Please provide numbers for unique faculty members across the participating departments and interdepartmental programs.

Total	0
Participating	0

Predoc

Total	0
Supported by any HHS Training Award	0
Total Predoctorates with Participating Faculty	0
Eligible Students with Participating Faculty	0
TGE Predocs Supported by this Training Grant	0
Predocs Supported by this Training Grant (R90 Only)	0

Postdoc

Total	0
Supported by any HHS Training Award	0
Total Postdoctorates with Participating Faculty	0
Eligible Postdocs with Participating Faculty	0
TGE Postdocs Supported by this Training Grant	0
Postdocs Supported by this Training Grant (R90 Only)	0

Figure 15: Training Support & Summary

5.11 Institutional Training Support

To add additional support:

1. Select the **Add Institutional Training Support** button.

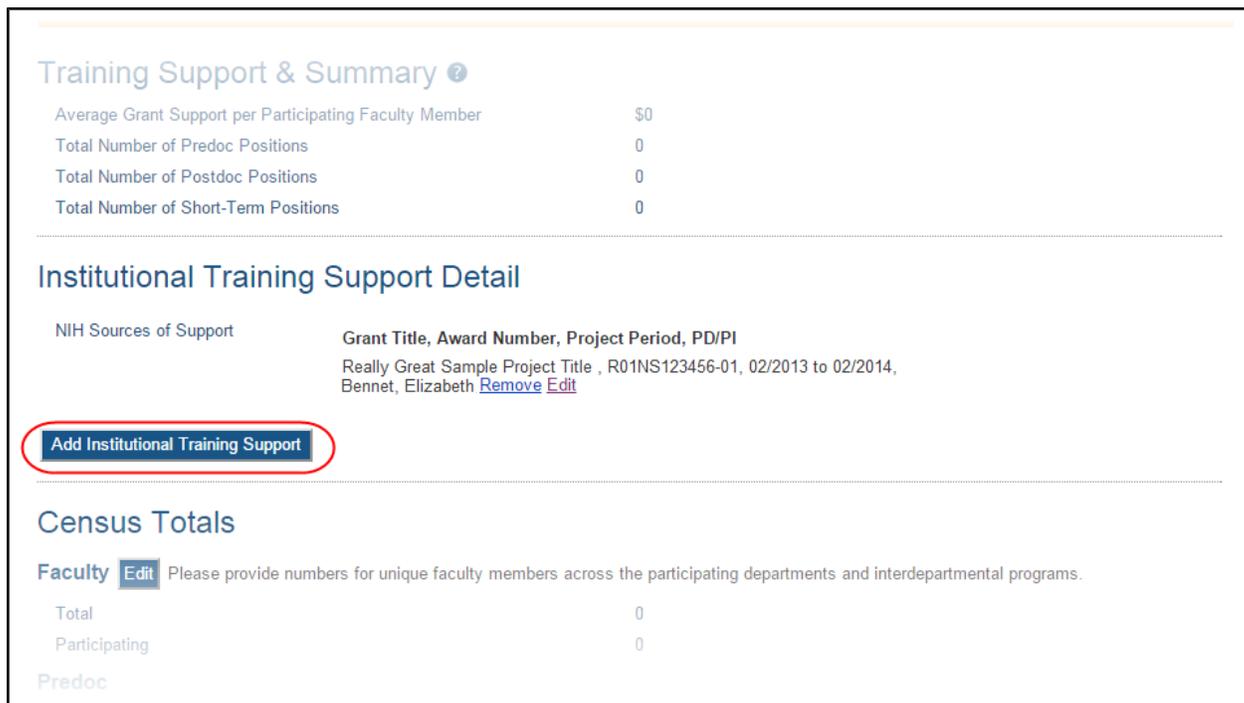


Figure 16: Add Institutional Training Support Button

2. Search for support by entering any of the criteria on the *Add Institutional Training Support* pop-up. You must enter either an IC Code or PD/PI Last Name.
 - Search Type
 - Activity Code
 - IC Code
 - Serial Number
 - Suffix Code
 - Start Date
 - End Date
 - PD/PI Last Name
 - Institution

Use the look up tool to search for and select an institution in the accompanying *Search for Institution(s)* pop up.

3. Select the **Search Funding Sources** button.

- From the result list, click the **Select** link from the **Action** column for the correct project.

The screenshot shows a web form titled "Add Institutional Training Support". It contains several input fields: "Search Type" (dropdown menu with "NIH" selected), "Activity Code", "IC Code", "Serial Number", "Suffix Code", "Start Date (mm/dd/yyyy)", and "End Date (mm/dd/yyyy)". Below these is a "PD/PI Last Name" field containing "%Bennet%". There is also an "Institution" field with a search icon. A note states: "You can perform a wildcard search by using the \"%\" character, for example: abcd% or %abcd% or ab%cd%". Two buttons are present: "Search Funding Sources" (circled in red) and "Clear".

Below the form, a table displays search results. The text "One item found." is shown above the table. The table has columns: Grant Number, PD/PI, Project Title, Institution, Project Start Date, Project End Date, and Action. The first row contains: K05CA123456, Bennett, Elizabeth, Sample Project Title, Pemberley College of Fictitious Research, 2014-01-09, 2018-12-31, and a "Select" button (circled in red).

A "Close" button is located at the bottom right of the form.

Figure 17: Searching for Funding Sources

The added source of support will display on the Prepare RTD screen.

Use the **Edit** and **Remove** links next to the record to update or remove the funding source as necessary.

5.12 Census Totals

Displays totals for Faculty, Predoctorates, and Postdoctorates.

Faculty

- Total
- Participating

Use the **Edit** button to add to or update the numbers for unique faculty members across participating departments and interdepartmental programs.

Predoc

The following read-only information is displayed. This data is maintained on the **Participating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Predoctorates with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

Postdoc

The following read-only information is displayed. This data is maintained on the **Participating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Postdoctorates with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

5.12.1 Institutional Training Support Detail (New Application)

Select the **Edit** link on the **Institutional Training Support** section of the *Training Support & Summary* to open the *Institutional Training Support Detail* screen.

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
PI/PI: Austen, Jane (Contact)

Institutional Training Support Detail

Project Title: Really Great Sample Project Title
Grant Number: R01NS123456-01

Number of Trainee Positions [Edit](#)

Number of Predoc Positions	0
Number of Postdoc Positions	0
Number of Short-Term Positions	0
Number of Participating Faculty	

Overlapping Faculty

[Add Overlapping Faculty](#)

Number of Overlapping Faculty 1

Overlapping Faculty Name	Actions
Darcy, Fitzwilliam	Remove

One item found.

Figure 18: Institutional Training Support Detail

5.13 Number of Trainee Positions

Use this section to add the number of Predoc, Postdoc, Short-term, and Participating Faculty positions.

1. Select the **Edit** button.
2. In the *Institution Training Support* pop up, enter the appropriate totals.
3. Select the **Save Institution Training Grant** button.

5.14 Overlapping Faculty

Use this section to update the number of overlapping faculty.

1. Select the **Add Overlapping Faculty** button.

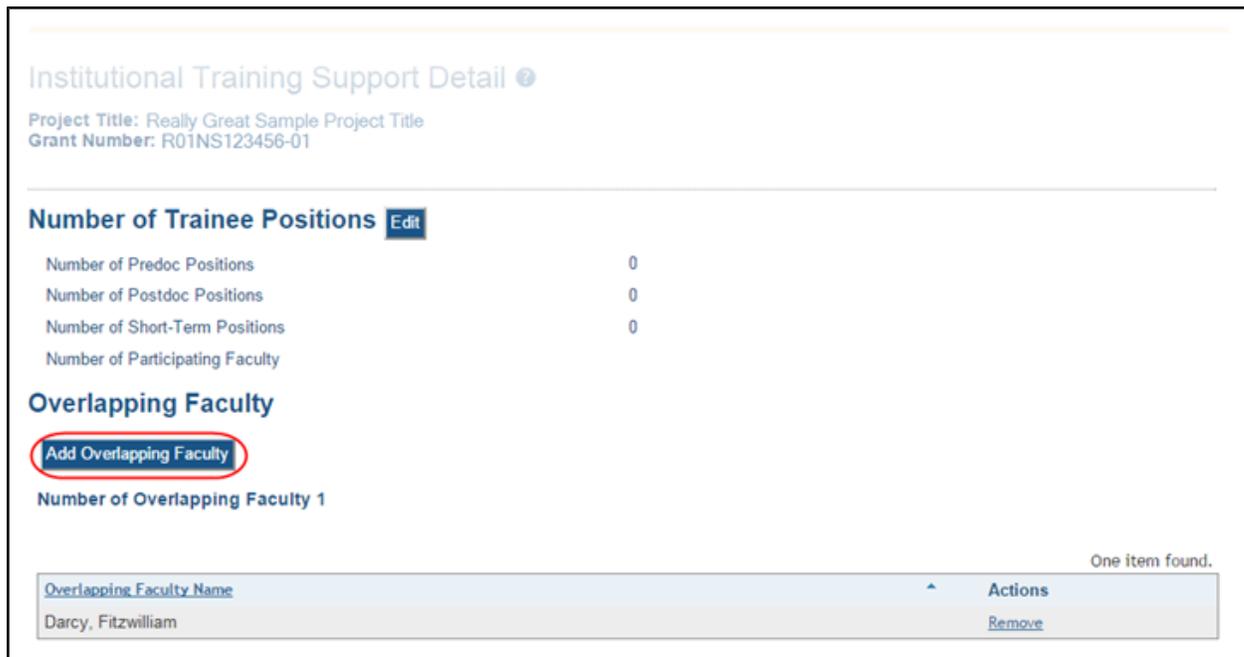


Figure 19: Add Overlapping Faculty Button

2. Search for faculty as necessary in the *Participating Faculty* pop-up.
3. In the **Action** column, select **Add Overlapping Faculty** for any participating faculty members that are also on the Institution Training Grant. If a needed faculty member does not display in the results, then add the faculty member as Participating Faculty as described in the topic titled [Refer to the section of this document titled Participating Faculty Members \(New Application\) on Page 26](#) for new applications.

The **Action** column updates with the word *Added*.

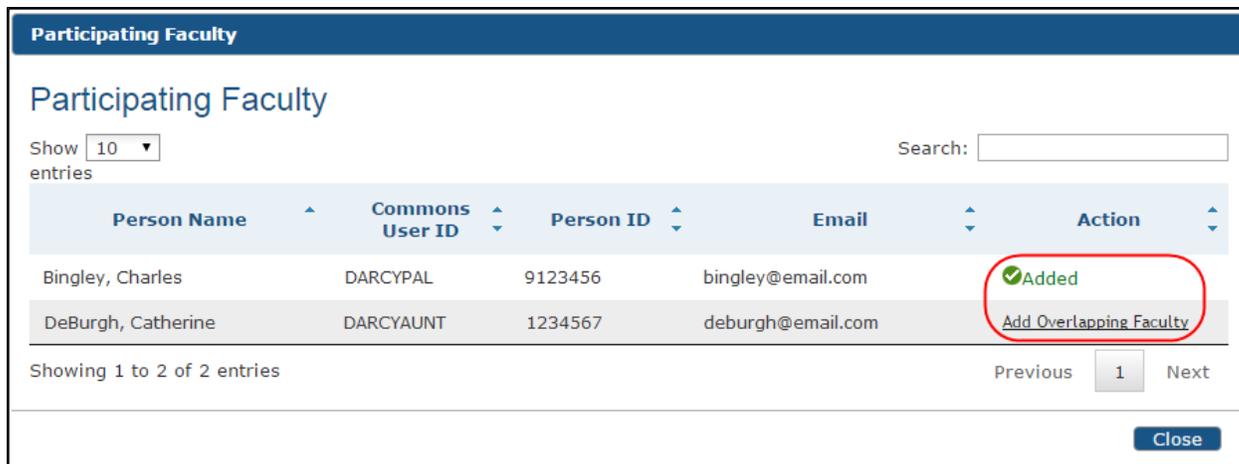


Figure 20: Adding Participating Faculty

4. Select the **Close** button.

The Overlapping Faculty Name displays on the *Institutional Training Support Detail* screen with the option to **Remove** the overlapping faculty member. The updated total count of the overlapping faculty is calculated by system and is displayed as read-only.

5.15 Participating Faculty Members (New Application)

Displays the participating faculty added to the RTD - or a message indicating that no faculty have been added, when appropriate.

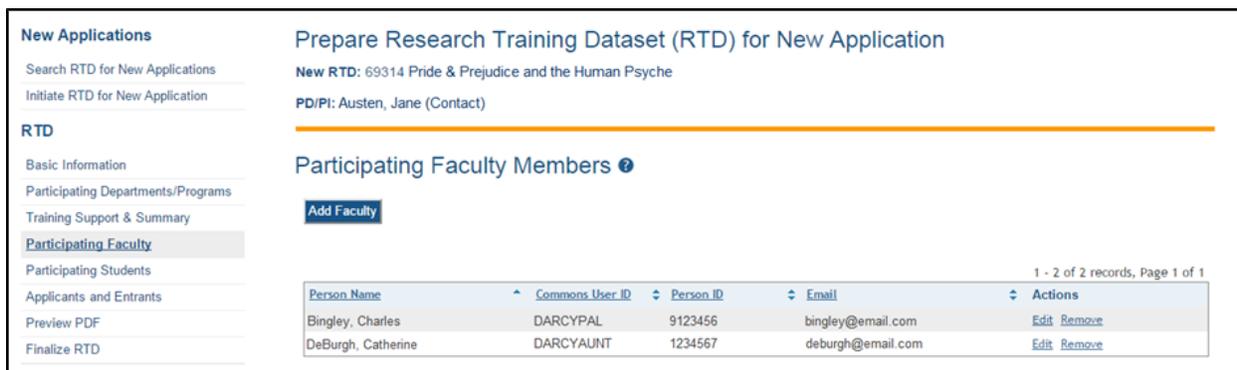


Figure 21: Participating Faculty Members

5.15.1 Add Faculty

To add faculty, select the **Add Faculty** button.

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons**

affiliation with my institution.

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

2. Select the **Search Person** button.
3. All matching records display in the **Person(s)** table. Select the **Add Faculty** link to add the person to the RTD.

The top of the screen will indicate that *<Last Name>, <First Name> has been added*. The **Action** column will display the word *Added*.

The screenshot shows a 'Search Faculty' window with a search form and a results table. The search form includes fields for Commons User ID, Person ID, First Name, Middle Name, and Last Name (containing 'McCullo%'). A checkbox is checked for 'Search for persons who have a Commons affiliation with my institution'. Below the form are 'Search Persons' and 'Clear' buttons. The results table has columns for Person Name, Commons User ID, Person ID, Commons Institution, Email, and Action. Two entries are shown: 'McCulloch, Ian' and 'McCulloch, Mac'. The 'Action' column for the second entry shows 'Add Faculty' circled in red. A 'Close' button is at the bottom right.

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
McCulloch, Ian	EATBSINGER	7123456	UNIVERSITY OF IMAGINATION	eatb@email.com	Added
McCulloch, Mac	ISMMAC	6543217	UNIVERSITY OF IMAGINATION	ismmac@3mail.com	Add Faculty

Figure 22: Search for Person

4. Search for and add other faculty as necessary, repeating the steps above.
5. Use the **Close** button to close the search screen when finished.

5.15.2 Edit Faculty

Use the **Edit** link in the **Actions** column to edit the participating faculty detail for the selected member. Refer to the topic titled *Participating Faculty Detail (New Application)* on Page 28.

5.15.3 Remove

Select the **Remove** link in the **Actions** column to remove the faculty member from the RTD. At the confirmation, select **Yes**.

5.15.4 Participating Faculty Detail (New Application)

Use the **View** links to display individual sections of the *Participating Faculty Detail*. The **Open All Sections** link reveals all collapsed sections at once.

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

[+ Open All Sections]

FACULTY MEMBER DATA

Commons User ID:	DARCYPAL
Email:	Darcy@email.com
Rank:	
Training Role(s):	

Edit

FACULTY DEGREE + VIEW

RESEARCH SUPPORT + VIEW

MENTORING RECORD + VIEW

Figure 23: Participating Faculty Details

Each section provides a means for editing the information. Refer to the steps below.

5.16 Faculty Member Data

Use the **View** link in the **Faculty Member Data** panel of the *Participating Faculty Detail* to display faculty data as described below.

- **Commons User ID** (read only)
- **Email** (read only)
- **Rank**
- **Primary Department or Program**
- **Research Interest**
- **Training Role(s)**

Use the **Edit** button to open the fields in a pop-up for editing. Select **Save Member Data** to save your changes.

5.17 Faculty Degree

From this panel, you may add a degree, edit a degree, or select a degree to add to an RTD.

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

5.17.1 Add a Degree

1. Select the **Add Another Degree** button.
2. Update the fields in the *Faculty Degree* pop-up:
 - **Degree**: Select from the list
 - **Other Degree Text**: Enter if the Degree selected is *OTH* (*other type of degree*).
 - **Degree Date**: Enter in MM/YYYY format
 - **Terminal Degree**: Select the **Yes** or **No** radio button as appropriate. When the **Yes** button is selected, the terminal degree indicator (*This is the terminal degree of this person.*) displays next to the degree details in the view. Only one degree for a person can be set as the Terminal Degree.
 - **Degree Status**: Completed is the only selection available for Faculty degrees.
 - **Degree Institution**: Enter the institution name, one institution per degree. You can search for an institution by selecting the magnifying glass search icon.
3. Select the **Save** button to save your changes.
4. Repeat for any additional degrees.
5. Select the **Close** button when finished.

5.17.2 Edit a Degree

1. Use the **Edit** button next to a listed degree to display the *Faculty Degree* pop-up for editing.
2. Updates the fields as necessary.
3. Select the **Save** button followed by the **Close** button.

5.17.3 Include in RTD

1. Locate the degree you are including in the RTD.
2. Check the **Include in RTD** box for the degree to be displayed in the **Participating Faculty Members Training Table** on the RTD PDF. Up to three degrees can be selected to include in the RTD.

Uncheck the box to exclude the degree.

5.17.4 Delete a Degree

Select the **Delete** link to delete the degree from the participating faculty detail. Delete degree is not available if the **Source** of the degree is *Commons Profile*, meaning the degree is from the Commons Personal Profile of the person.

5.18 Research Support

5.18.1 NIH Sources of Support

Includes the NIH Grant number, Project Title, Period of Support. This information is displayed as read-only.

5.18.2 Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date. xTRACT displays as read-only current NIH support held by the faculty member.

To add additional support:

1. Select the **Add Another Support** button to display fields for searching/editing to add a non-NIH funding source.
2. Search for a funding source:
 - a. Select the magnifying glass icon next to the **Funding Source** field.
 - b. Search for support entering the parameters given and selecting **Search Funding Sources** button.
 - c. From the result list, click the **Select** link from the **Action** column for the correct project.
3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.

4. Select an option from the **Role during funding** drop-down.
5. Select **Save**.
6. Repeat the search to add more.
7. Select **Close** when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

5.19 Mentoring Record

Use the **View** link in the **Mentoring Record** panel of the *Participating Faculty Detail* to display in number of mentors.

- Predocs In Training
- Predocs Graduated
- Predocs Continued in Research or Related Careers
- Postdocs in Training
- Postdocs Completed Training
- Postdocs Continued in Research or Related Careers

Use the **Edit** button to open the fields in a pop-up for editing. Save your changes by selecting the **Save Mentoring Records** button on the pop-up.

5.20 Students (New Application)

This section displays the students added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove students.

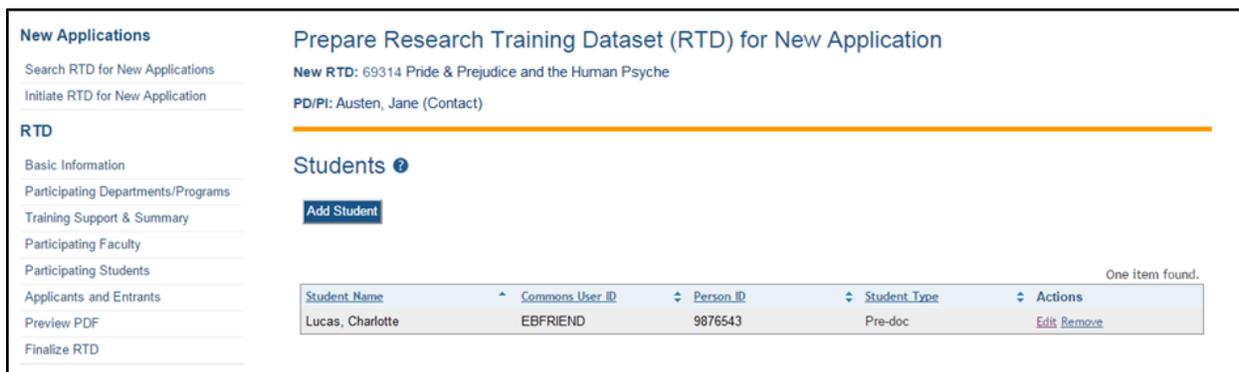


Figure 24: Students

Students(s) are listed in a table at the bottom of the screen along with the following information:

- **Student Name**
- **Commons User ID** (if available)
- **Person ID**
- **Student Type:** Pre-doc or Post-doc
- **Actions**
 - The **Edit** link opens the *Student Detail* for the selected student. Refer to the topic titled [Student Detail \(New Application\) on Page 33](#).
 - The **Remove** link removes the person from the RTD.

The **Add Student** feature allows you to search for and add students or create new xTRACT persons to add to the RTD.

5.21 Add Student

To add a student:

1. Select the **Add Student** button.
2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

NOTE: You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

3. All matching records display in the **Person(s)** table. Select the **Add Student** link in the **Action** to add the person.

NOTE: After you perform a search, the **Create xTRACT Person** button is enabled. Use this button to create an xTRACT person record. Refer to the topic titled [Create xTRACT Person on Page 165](#)

4. Select the **Student Type** from the pop-up box and click **OK**.
5. Repeat for any to add other students. Added students appear in the **Person(s)** list with the word *Added* shown in the **Action** column.
6. Use the **Close** button to close the search screen.

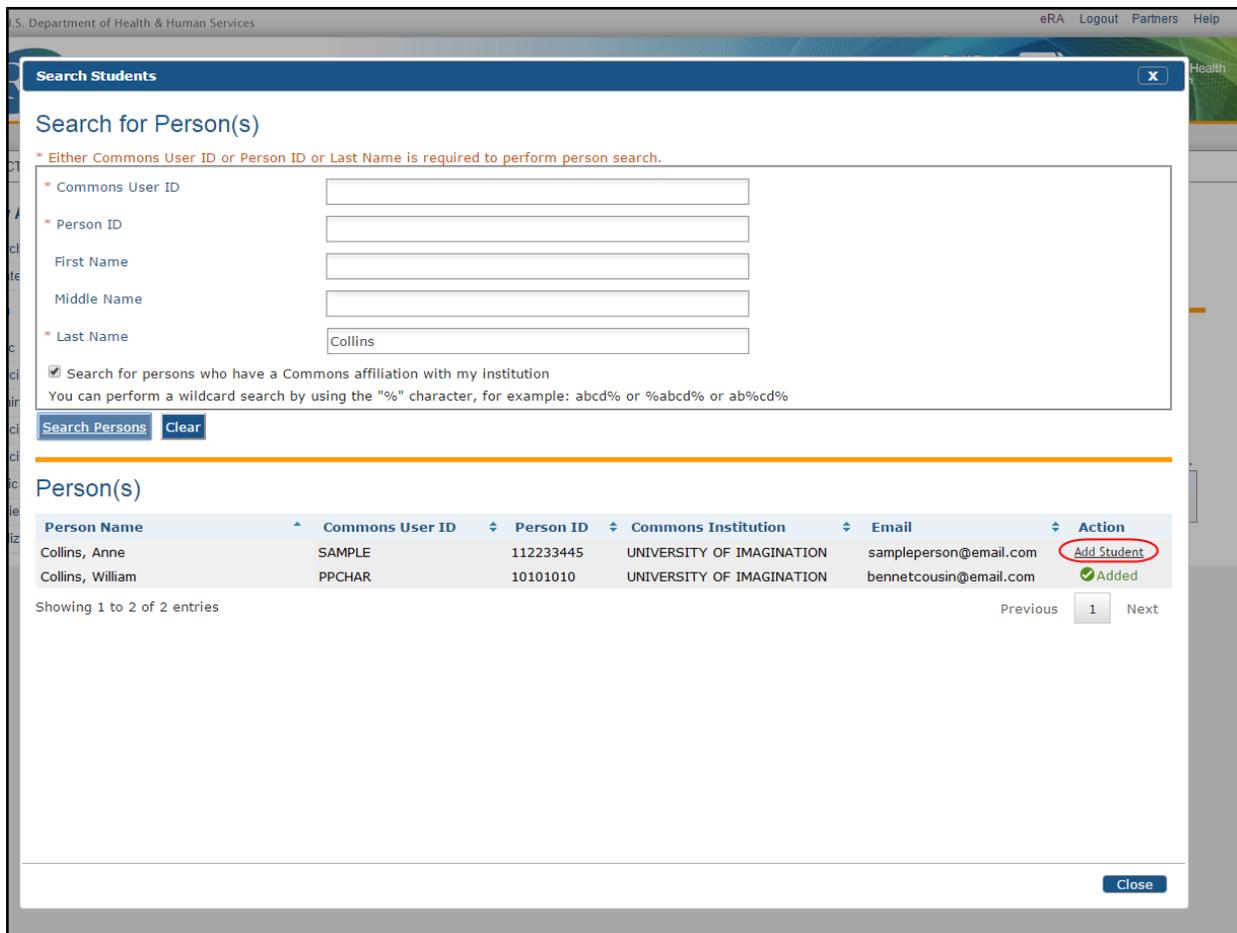


Figure 25: Search for Students

5.22 Edit Student

From the list of students, select the **Edit** link in the **Actions** column to edit the student detail.

Refer to the topic titled [Student Detail \(New Application\) on Page 33](#).

5.23 Remove

Select the **Remove** link in the **Actions** column to remove the student from the RTD. At the confirmation, select **Yes**.

5.23.1 Student Detail (New Application)

Use the **View** links to display individual sections of the *Student Detail*. The **Open All Sections** link reveals all collapsed sections at once.

Figure 26: Student Detail

Each section provides a means for viewing or editing the information. Refer to the steps below.

5.24 Student Data

Use the **View** link in the **Student Data** panel of the *Student Detail* to display the following read-only information:

- Commons User ID or Person ID
- Email

5.25 In Training Data

Use the **View** link in the **In Training Data** panel of the *Student Detail* to display in training data as described below. Use the **Edit** button to open the fields in a pop-up for editing.

- In Training
- Type
- Research Topic

- Start Date
 - Into Current Degree-Granting Program, for a Predoctoral trainee
 - Into Postdoctoral Research, for Postdoctoral trainee
- End Date (when Trainee Left Program)

5.26 Faculty Members

Displays the faculty member for the student on the RTD.

To add faculty, select the **Add Faculty** button.

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution.**

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

2. Select the **Search Person** button.
3. All matching records display in the **Person(s)** table. Select the **Add Faculty** link to add the person to the RTD.

The top of the screen will indicate that *<Last Name>, <First Name> has been added.* The **Action** column will display the word *Added.*

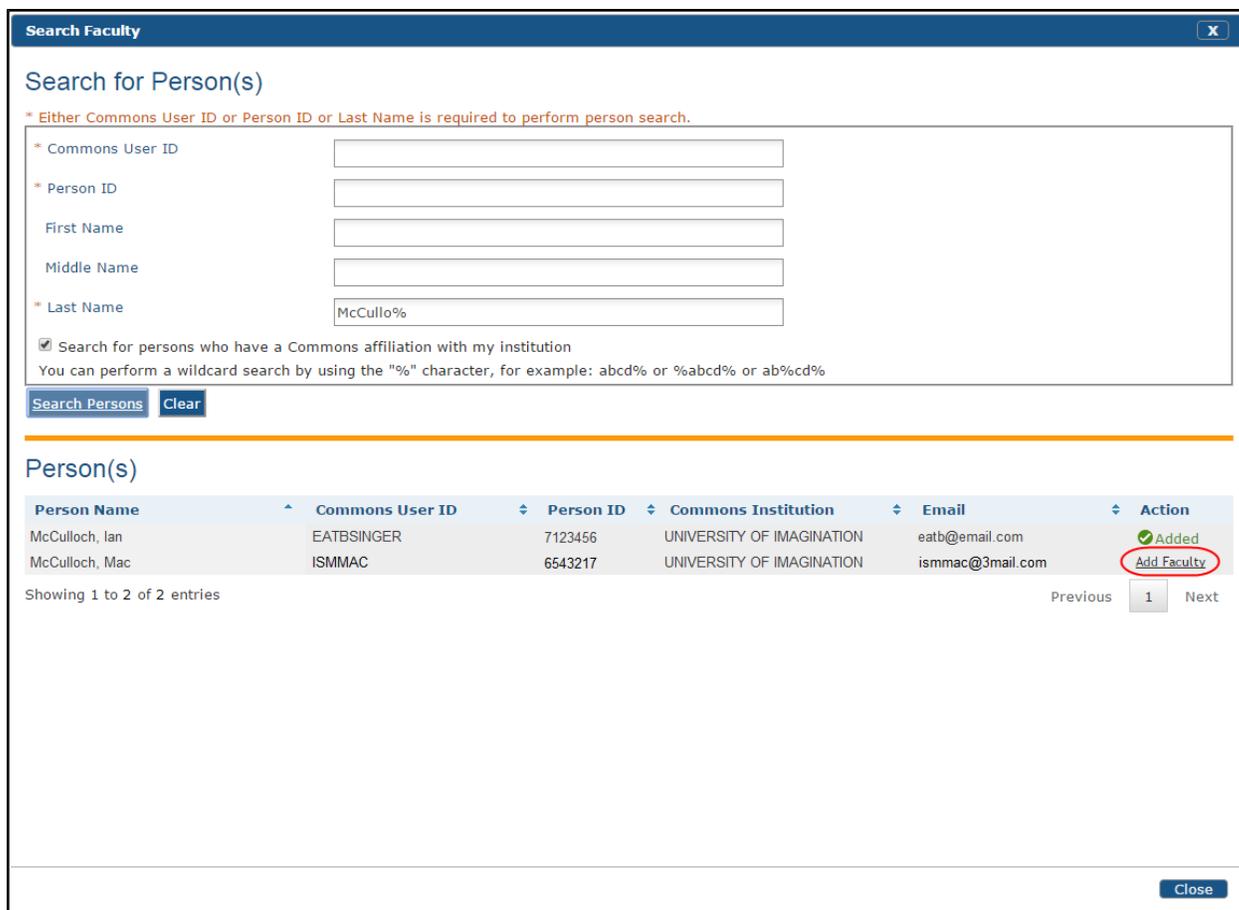


Figure 27: Search for Person

4. Search for and add other faculty as necessary, repeating the steps above.
5. Use the **Close** button to close the search screen when finished.

To remove a faculty member from the RTD, select the **Delete** link from the **Action** column.

5.27 Degrees

xTRACT displays a list of completed degrees and associated data in reverse chronological order, with incomplete degrees following.

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

To add a degree:

1. Select the **Add Degree** button.
2. Update the fields in the *Create a New Degree* pop-up:

- **Degree:** Select from the list
 - **Other Degree Text:** Enter if Degree selected is *OTH (other type of degree)*.
 - **Degree Date:** Enter in MM/YYYY format
 - **Terminal Degree:** Select the **Yes** or **No** . When **Yes** is selected, the terminal degree indicator (*This is the terminal degree of this person.*) displays next to the degree details in the view. Only one degree per person can be set as the Terminal Degree.
 - **Degree Status:** Select Completed or In Progress, as appropriate
 - **Received in Training:** Select Yes or No. Up to three degrees can be selected as Received in Training.
 - **Degree Institution:** Enter the institution name, one institution per degree. You can search for an institution by selecting the magnifying glass search icon.
3. Select the **Save** button to save your changes.
 4. Repeat for any additional degrees.
 5. Select the **Close** button when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the degrees as necessary. Degrees with *Commons Profile* as a **Source** cannot be deleted.

5.28 Post-Training Positions

Displays post-training positions employment information. The **Source** of positions is displayed as read-only as *xTRACT* (meaning the position was added or updated for the person in xTRACT) or as *Commons Profile* (meaning the position is from the Commons Personal Profile of the person).

To add employment:

1. Select the **Add Employment** button.
2. Provide the following information:
 - **Faculty Teaching Position:** Select from the list
 - Professor; Associate Professor; Assistant Professor; Instructor; Other
 - **Academic Administrative Position:** Select from the list
 - President; Vice President; Dean; Assistant or Associate Dean; Chairperson of Department (or Director); Other
 - **Primary Employment Indicator:** Select the **Yes**, **No**, appropriate.
 - **Full Time Employment Indicator:** Select **Full-Time** or **Part Time**
 - **Current/Initial Employment Indicator:** Select **Primary Current** or **Primary Initial**

- **Primary Activity:** Select from list
 - Research-intensive; Research-related; Further training; Other
 - **Employment Position:** Enter the position title for the employment. This is required.
 - **Institution:** Enter the institution or select the icon to open a search box
 - **Primary Department of Position:** Enter the department or select the icon to open a search box
 - **Start Date:** Select a date in MM/YYYY format. This is required.
 - **End Date:** Select a date MM/YYYY format.
3. Select the **Save** button to save your changes.
 4. Repeat to add another.
 5. Select **Close** to close the window.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the positions as necessary. Positions with a **Source** of *Commons Profile* cannot be deleted.

5.29 Subsequent Grants

NIH Sources of Support

Includes the NIH Grant number, Project Title, Period of Support.

To add additional NIH support:

1. Select the **Add NIH Source of Support** button to open the *Edit/Add Sources of Support* pop-up.
2. Select the search icon next to **Funding Source** to open query fields.
 - a. Enter search criteria in the fields.
 - b. Select the **Search Funding Sources** button.
 - c. From the list, select the funding source by clicking the appropriate **Select** link in the **Action** column.
3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
4. Select **Save**.
5. Repeat the search to add more.

Use the **Edit** and **Delete** links to update or remove the funding source as necessary.

Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start

Date.

To add additional support:

1. Select the **Add Other Source of Support** button to open the *Edit/Add Sources of Support* pop-up.

Search for support or create new funding source:

To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- b. From the result list, click the **Select Funding Source** link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
 - b. Update the fields. Required fields show a red asterisk (*).
 - c. Select **Save**.
2. Select an option from the **Role during funding** drop-down.
 3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
 4. Select **Save**.
 5. Repeat the search to add more.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

5.30 Publications

To add a publication:

1. Select the **Add Publication** button.
2. From the *Edit/Add Publication* pop-up, enter the required information:
 - Publication (Authors, Year, Title, Journal, Volume, Inclusive Pages)
 - Faculty Member

To search for a faculty member, click the magnifying glass icon to open *Search for Person (s)* pop-up.

- a. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons**

who have a Commons affiliation with my institution.

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

- b. All matching records display in the **Person(s)** table. Click the **Select Faculty** link to add the person. This will populate the name into the *Edit/Add Publication* pop-up, which will display on your screen once again.
3. Select the **Save** button to save the information. You will see a confirmation at the top of the pop-up.
4. Select the **Close** button to return to the *Student Detail* screen.

To indicate no publications, mark the checkbox titled **Check this box if there are no publications for this trainee.**

If there are no publications checked:

1. Select a reason for **No Publications** from the drop-down list.
2. Search for and select a faculty member.
3. Select the **Save** button to save the information.

Use the **Edit** and **Delete** buttons next to a specific publication to update or remove that record.

5.31 Applicants and Entrants (New Application)

To enter Pre-doc and Post-doc applicants and entrants, first enter the start year of the most recently completed academic year and click the **Submit** button.

Select the **Pre-Doc Applicants and Entrants** and **Post-Doc Applicants and Entrants** links to display and enter data for the specific academic year(s).

Figure 28: Applicants and Entrants

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).

For example, let's say the first academic year is 2000-2001 and there are applicant/entrant data entered for that year. If the first academic year is changed to 2001-2002 by changing the most recently-completed academic year from 2001 to 2002, the same applicant/entrant data display for that first year.

5.31.1 Predoctoral Applicant and Entrant Counts and Characteristics (New Application)

5.31.1.1 Edit the Counts and Characteristics

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit <X>** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save <X>** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

Prepare Research Training Dataset (RTD) for New Application

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

[2014 - 2015](#)
[2013 - 2014](#)
[2012 - 2013](#)
[2011 - 2012](#)
[2010 - 2011](#)
[Summary](#)

Predocutorial Applicant and Entrant Counts and Characteristics ?

Counts

Department or Program	Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support
College of Imagination				
Department of Psychology				
Pharmacology				
School of Communication				
Total	0	0	0	0

[Edit Counts](#)

Characteristics

GPA

Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support
Mean GPA			
Lowest GPA			
Highest GPA			

[Edit GPA](#)

Research Experience

	New Entrants to the Program	New Entrants Eligible for Support
Mean Months of Prior, Full-Time Research Experience		
Lowest Number of Months of Prior, Full-Time Research Experience		
Highest Number of Months of Prior, Full-Time Research Experience		

[Edit Research Experience](#)

Prior Institutions

Institution	New Entrants to the Program	New Entrants Eligible for Support	Action
<input type="text" value="Search for Institution"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Add Prior Institution

Diversity

	New Entrants to the Program	New Entrants Eligible for Support
Percent with a Disability		
Percent from Underrepresented Racial & Ethnic Groups		

[Edit Diversity](#)

Figure 29: Predocutorial Applicant and Entrants Counts and Characteristics

5.32 Counts table

For Predocutorial Applicants and Entrants, Counts are entered by Participating Departments or Program. If a Department or Program is missing, refer to the topic titled [Participating Departments and Programs \(New Application\)](#) on Page 11.

- Department or Program (read only)
- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

5.33 Characteristics

The following tables exist for Characteristics:

5.33.1 GPA

Enter the Mean GPA, Lowest GPA, and Highest GPA for the following:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

5.33.2 Research Experience

Enter the mean, lowest, and highest number of months of prior, full-time research experience for the following:

- New Entrants to the Program
- New Entrants Eligible for Support

5.33.3 Prior Institutions

Use the **Search for Institution** link to open a pop-up for searching and selecting an institution. Once the institution is selected and displayed on the table, select the **Add Prior Institution** link in the **Action** column.

Use the **Edit** and **Remove** links to modify or remove this data.

- New Entrants to the Program
- New Entrants Eligible for Support

5.33.4 Diversity

Enter the percent of entrants with a disability and the percent from under-represented racial and ethnic groups for the following:

- New Entrants to the Program
- New Entrants Eligible for Support

5.33.4.1 Summary of Counts and Characteristics

Select the **Summary** tab to display a summary for predoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.

To edit this information, refer to the above section of this topic.

5.33.5 Postdoctoral Applicant and Entrant Counts and Characteristics (New Application)

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit <X>** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save <X>** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

Prepare Research Training Dataset (RTD) for New Application

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

2014 - 2015 | 2013 - 2014 | 2012 - 2013 | 2011 - 2012 | 2010 - 2011 | Summary

Postdoctoral Applicant and Entrant Counts and Characteristics ?

Counts

	Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support
PhDs				
MDs				
Dual-Degree Holders				
Other Degree Holders				
Total	0	0	0	0

[Edit Counts](#)

Characteristics

Publications

	Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support
Mean Number of Publications				
Lowest Number of Publications				
Highest Number of Publications				
Mean Number of First-Author Publications				
Lowest Number of First-Author Publications				
Highest Number of First Author Publications				

[Edit Publication](#)

Prior Institutions

Institution	New Entrants to the Program	New Entrants Eligible for Support	Action
<input type="text" value="Search for Institution"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Add Prior Institution

Diversity

	New Entrants to the Program	New Entrants Eligible for Support
Percent with a Disability		
Percent from Underrepresented Racial & Ethnic Groups		

[Edit Diversity](#)

Figure 30: Postdoctoral Applicant and Entrants Counts and Characteristics

5.34 Counts table

For PhDs, MDs, dual-degree holders, and other degree holders, update the following information:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

5.35 Characteristics

The following tables exist for Characteristics:

5.35.1 Publications

Enter the mean, lowest, and highest number of publications as well as the mean, lowest, and highest number of first author publications for the following:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

5.35.2 Prior Institutions

Use the **Search for Institution** link to open a pop-up for searching and selecting an institution. Once the institution is selected and displayed on the table, select the **Add Prior Institution** link in the **Action** column.

Use the **Edit** and **Remove** links to modify or remove this data.

- New Entrants to the Program
- New Entrants Eligible for Support

5.35.3 Diversity

Enter the percent of entrants with a disability and the percent from under-represented racial and ethnic groups for the following:

- New Entrants to the Program
- New Entrants Eligible for Support

5.35.3.1 Summary of Counts and Characteristics

Select the **Summary** tab to display a summary for postdoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.

To edit this information, refer to the above section of this topic.

5.36 *Preview PDF (New Application)*

Select the **Preview PDF** link to open save, and/or print the training tables. An *In Progress* watermark will be printed on the *Training Table* PDF until the RTD is finalized.

5.37 *Finalize RTD (New Application)*

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.

A confirmation message warns: *Once finalized the Research Training Data cannot be edited. Are you sure you want to continue?*

IMPORTANT: 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.

xTRACT generates a PDF version of the training tables without the *In Progress* watermark, updates the status of the RTD to *Final*, and locks the RTD for editing.

6 Prepare RTD for Research Performance Progress Report (RPPR)

To access the screen:

1. Search for the training grant on the *Search for Training Grants* screen. Refer to the topic titled [Search for Training Grants on Page 5](#) for steps.
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.

The *Prepare Research Training Dataset (RTD) for Research Performance Progress Report (RPPR)* screen opens for the selected training grant. Use the links listed under **RTD** on the left side of the screen to maintain the specific sections of the RTD:

- Maintain participating trainees
- Maintain program statistics (if applicable to the training grant)
- Preview PDF
- Finalize the RTD

Selecting the links above opens the specific section of the RTD. From within, you can add, edit, and/or remove data.

6.1 Participating Trainees (RPPR)

Displays the participating trainees added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove participating trainees.



Figure 31: Participating Trainees

Participating trainee(s) are listed in a table at the bottom of the screen along with the following information:

- **Person Name**
- **Commons User ID** (if available)
- **Person ID**
- **Trainee Type:** Pre-doc; Post-doc; Short Term
- **Start Date**
- **End Date**
- **Actions**
 - The **Edit** link opens the *Participating Trainee Detail* for the selected trainee. Refer to the topic titled *Participating Trainee Detail (RPPR) on Page 52*.
 - The **Remove** link removes the person from the RTD.

The **Add Trainee** feature allows you to search for and add existing trainees or create new trainees to add to the progress report. Refer to the topic titled *Add Trainee (RPPR) on Page 49* for more information.

6.1.1 Add Trainee (RPPR)

You can add a trainee to a progress report from the RTD screen. To access this screen, you must first perform a search for the grant.

Select the **Prepare for RPPR** or **Continue for RPPR** link from the **RTD Action** column for the grant as appropriate to open the *Prepare Research Training Dataset (RTD) for Research Performance Progress Report (RPPR)* screen.

To add a trainee from a search:

1. Select the **Add Trainee** button.
2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

NOTE: You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

3. All matching records display in the **Person(s)** table. Select the **Add Trainee** link in the **Action** to add the person.
4. Select the **Trainee Type** from the pop-up box: Pre Doctoral, Post Doctoral or Short Team and click **OK**.
5. Repeat for any to add other trainees. Added trainees appear in the Person(s) list with the word *Added* shown in the **Action** column.
6. Use the **Close** button to close the search screen.

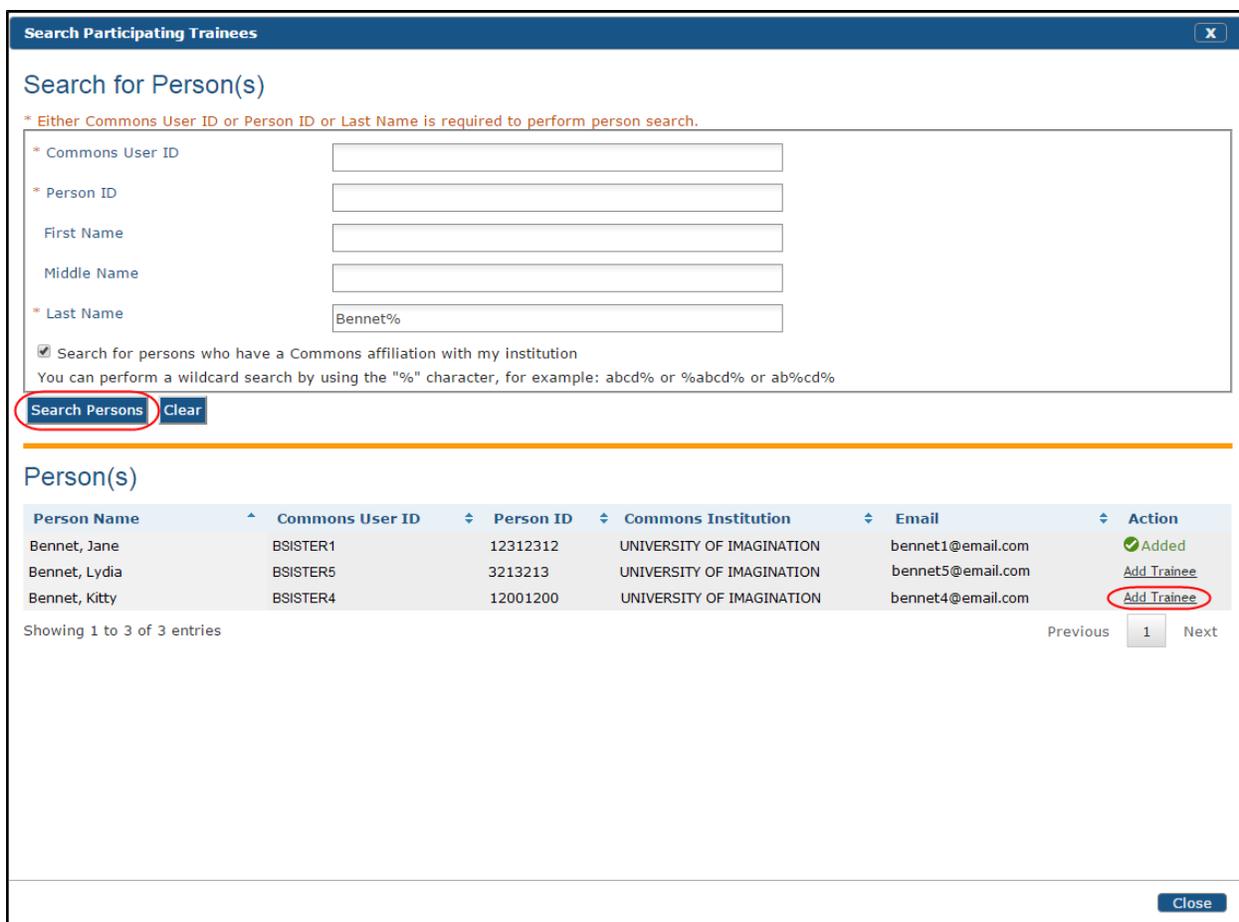


Figure 32: Search Participating Trainees

To add a trainee you are creating:

1. Perform a search as described above. You cannot create a new person record unless you first perform a search.
2. Select the **Create xTRACT Person** button located under the Person(s) table. This button is only available after you have performed a search.

The screenshot shows a window titled "Search Participating Trainees" with a sub-header "Search for Person(s)". Below the sub-header, there is a note: "* Either Commons User ID or Person ID or Last Name is required to perform person search." The search criteria form includes fields for "Commons User ID", "Person ID", "First Name", "Middle Name", and "Last Name" (containing "Bennet"). A checkbox is checked for "Search for persons who have a Commons affiliation with my institution". Below the form are "Search Persons" and "Clear" buttons. A horizontal orange line separates the search section from the results section. The results section is titled "Person(s)" and displays "No records found". A button labeled "Create xTRACT Person" is circled in red. A "Close" button is in the bottom right corner.

Figure 33: Create xTRACT Person Button

The *Create xTRACT Person* screen displays.

The screenshot shows a window titled "Search Participating Trainees" with a sub-header "Create xTRACT Person". Below the sub-header, there is a note: "* Required field(s)". The form includes fields for "Prefix" (a dropdown menu with "-- Select --"), "First Name", "Middle Name", "Last Name", "Suffix" (a dropdown menu with "-- Select --"), and "Email Address". Below the form are "Create xTRACT Person" and "Cancel" buttons. A "Close" button is in the bottom right corner.

Figure 34: Create xTRACT Person Fields

3. Enter the person data in the designated fields.
 - **Prefix:** Select an option from the list.
 - **First Name** (required)
 - **Middle Name**
 - **Last Name** (required)
 - **Suffix:** Select an option from the list.
 - **Email Address**
4. Select the **Create xTRACT Person** button to save the changes.

Use the displayed xTRACT Person Profile to provide details about the added person. For additional information, refer to the topic titled [xTRACT Person Profile on Page 160](#).

6.1.2 Participating Trainee Detail (RPPR)

While preparing an RTD for a progress report, you can open the *Participating Trainee Detail* for a trainee by selecting that trainee's **Edit** link. The *Participating Trainee Detail* for the selected person is grouped into panels. Use the **View** and **Edit** buttons and links to display and edit the information as detailed below.

Prepare Research Training Dataset (RTD) for Research Performance Progress Report (RPPR)

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche

PD/PI: Austen, Jane (Contact)

RTD Reporting Period: 09/01/1998 - 07/31/2015

Participating Trainee Detail ?

Lucas, Charlotte (Post-doc)

[\[+ Open All Sections \]](#)

TRAINEE DATA		+ VIEW
Commons User ID:	BENNETPAL	
Email:	clucas@email.com	

IN TRAINING DATA	+ VIEW
FACULTY MEMBERS	+ VIEW
SUPPORT DURING TRAINING	+ VIEW
DEGREES	+ VIEW
POST-TRAINING POSITIONS	+ VIEW
SUBSEQUENT GRANTS	+ VIEW

Figure 35: Participating Trainee Detail (RPPR)

IMPORTANT: The information displayed in the trainee detail is comprised of information pulled from the trainee's eRA Commons Personal Profile, where available. However, updates made to the xTRACT trainee detail will not update that trainees Personal Profile in Commons.

6.2 Trainee Data

Use the **View** link in the **Trainee Data** panel of the *Participating Trainee Detail* to display the following read-only information, as applicable:

- Commons User ID
- Email

6.3 In Training Data

Use the **View** link in the **In Training Data** panel of the *Participating Trainee Detail* to display in training data as described below. Use the **Edit** button to open the fields in a pop-up for editing.

- In Training
- Type
- Research Topic
- Start Date
 - Current Degree-Granting Program for a Predoctoral trainee
 - Postdoctoral Research for Postdoctoral trainee
- End Date (when Trainee Left Program)

NOTE: In order to finalize the RTD for an RPPR, all trainees must have a start date in the **In Training Data** section. Additionally, trainees with *No* selected for **In Training** status must have an end date.

6.4 Faculty Members

Displays the participating faculty added to the RTD.

To add faculty, select the **Add Faculty** button.

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution**.

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

2. Select the **Search Person** button.
3. All matching records display in the **Person(s)** table. Select the **Add Faculty** link to add the person to the RTD.

The top of the screen will indicate that *<Last Name>, <First Name> has been added*. The **Action** column will display the word *Added*.

Search Faculty [X]

Search for Person(s)

* Either Commons User ID or Person ID or Last Name is required to perform person search.

* Commons User ID:

* Person ID:

First Name:

Middle Name:

* Last Name:

Search for persons who have a Commons affiliation with my institution
 You can perform a wildcard search by using the "%" character, for example: abcd% or %abcd% or ab%cd%

[Search Persons](#) [Clear](#)

Person(s)

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
McCulloch, Ian	EATBSINGER	7123456	UNIVERSITY OF IMAGINATION	eatb@email.com	Added
McCulloch, Mac	ISMMAC	6543217	UNIVERSITY OF IMAGINATION	ismmac@3mail.com	Add Faculty

Showing 1 to 2 of 2 entries

Previous **1** Next

[Close](#)

Figure 36: Search for Person

4. Search for and add other faculty as necessary, repeating the steps above.
5. Use the **Close** button to close the search screen when finished.

To remove a faculty member from the RTD, select the **Delete** link in the **Action** column.

6.5 Support During Training

NOTE: This section applies to pre-doc and and post-doc trainees only.

Sources of support, both within and outside of NIH, can be maintained in this section. Click on the collapsed panel to display the information.

After a start date has been added for the trainee in *In Training Data*, the **Training Years (TYs)** will be displayed as read-only with corresponding abbreviations for funding sources in **Support During Training**.

This NIH Training Grant

Includes the NIH Grant number , Project Title, Period of Support.

Click the **Add This NIH Source of Support** to add support from **This NIH Training Grant**. Enter the **Start of Funding** and **End of Funding**. To remove support from **This NIH Training Grant**, select **Delete All from This NIH Funding Source of Support**.

NIH Sources of Support

Includes the NIH Grant number, Project Title, Period of Support.

To add additional NIH support:

1. Select the **Add NIH Source of Support** button to open the *Edit/Add Sources of Support* pop-up.
2. Select the search icon next to **Funding Source** to open query fields.
 - a. Enter search criteria in the fields.
 - b. Select the **Search Funding Sources** button.
 - c. From the NIH Funding Source(s) list, select the funding source by clicking the appropriate **Select Funding Source** link in the **Action** column.
3. Select an option from the **Role during funding** drop-down.
4. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
5. Enter the **Other role description** if *Other* was selected for **Role during funding**.
6. Select **Save**.
7. Repeat the search to add more.
8. Select **Close** when finished.

Use the **Edit** and **Delete** links in the Action column to update or remove the funding source as necessary.

Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date.

To add additional support:

1. Select the **Add Other Source of Support** button to open the *Edit/Add Sources of Support* pop-up.

Search for support or create new funding source:

To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.

- b. From the result list, click the **Select Funding Source** link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
 - b. Update the fields. Required fields show a red asterisk (*).
 - c. Select **Save**.
2. Select an option from the **Role during funding** drop-down.
 3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
 4. Enter the **Other role description** if *Other* was selected for **Role during funding**.
 5. Select **Save**.
 6. Repeat the search to add more.
 7. Select **Close** when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

6.6 Degrees

xTRACT displays a list of completed degrees and associated data in reverse chronological order, with incomplete degrees following.

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

To add a degree:

1. Select the **Add Degree** button.
2. Update the fields in the *Create a New Degree* pop-up:
 - **Degree**: Select from the list
 - **Other Degree Text**: Enter the name of the degree if an *OTH* type of degree was selected.
 - **Degree Date**: Enter in MM/YYYY format
 - **Terminal Degree**: Select the **Yes** or **No** as appropriate. When **Yes** is selected, the terminal degree indicator (*This is your terminal degree.*) displays next to the degree details in the view. A person can only have one terminal degree.
 - **Degree Status**: Select Completed or In Progress, as appropriate

- **Received in Training:** Select Yes or No. Up to three degrees can be set as Received in Training.
 - **Degree Institution:** Enter the institution name, one institution per degree. You can search for an institution by selecting the magnifying glass search icon.
3. Select the **Save** button to save your changes.
 4. Repeat for any additional degrees.
 5. Select the **Close** button when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the degree(s) as necessary. Degrees *Commons Profile* as the **Source** cannot be deleted.

6.7 Post-Training Positions

Displays post-training positions employment information.

The **Source** of positions is displayed as read-only as *xTRACT* (meaning that the position was added to the person in xTRACT) or as *Commons Profile* (meaning that the position is from the Commons Personal Profile of the person).

To add employment:

1. Select the **Add Employment** button.
2. Provide the following information:
 - **Faculty Teaching Position:** Select from the list:
 - Professor; Associate Professor; Assistant Professor; Instructor; Other
 - **Academic Administrative Position:** Select from the list:
 - President; Vice President; Dean; Assistant or Associate Dean; Chairperson of Department (or Director); Other
 - **Primary Employment Indicator:** Select the **Yes** or **No**.
 - **Full Time Employment Indicator:** Select **Full-Time** or **Part-Time**
 - **Current/Initial Employment Indicator:** Select **Primary Current** or **Primary Initial**
 - **Primary Activity:** Select from list
 - Research-intensive; Research-related; Further training; Other
 - **Employment Position:** This is required.
 - **Institution:** Enter the institution or select the icon to open a search box
 - **Primary Department of Position:** Enter the department or select the icon to open a search box

- **Start Date:** Select a date in MM/YYYY format. This is required.
 - **End Date:** Select a date MM/YYYY format.
3. Select the **Save** button to save your changes.
 4. Repeat to add another.
 5. Select **Close** to close the window.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the position(s) as necessary. Positions with *Commons Profile* as the **Source** cannot be deleted.

6.8 Subsequent Grants

NIH Sources of Support

Includes the NIH Grant number, Project Title, Period of Support.

To add additional NIH support:

1. Select the **Add NIH Source of Support** button to open the *Edit/Add Sources of Support* pop-up.
2. Select the search icon next to **Funding Source** to open query fields.
 - a. Enter search criteria in the fields.
 - b. Select the **Search Funding Sources** button.
 - c. From the NIH Funding Source(s) list, select the funding source by clicking the appropriate **Select Funding Source** link in the **Action** column.
3. Select an option from the **Role during funding** drop-down.
4. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
5. Select **Save**.
6. Repeat the search to add more.
7. Select **Close** when finished.

Use the **Edit** and **Delete** links in the Action column to update or remove the funding source as necessary.

Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date.

To add additional support:

1. Select the **Add Other Source of Support** button to open the *Edit/Add Sources of Support* pop-up.

Search for support or create new funding source:

To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- b. From the result list, click the **Select Funding Source** link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
 - b. Update the fields. Required fields show a red asterisk (*).
 - c. Select **Save**.
2. Select an option from the **Role during funding** drop-down.
 3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
 4. Select **Save**.
 5. Repeat the search to add more.
 6. Select **Close** when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

6.9 Program Statistics (RPPR)

Prepare Research Training Dataset (RTD) for Research Performance Progress Report (RPPR)

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche

PD/PI: Austen, Jane (Contact)

RTD Reporting Period: 09/01/1998 - 07/31/2015

Program Statistics ?

Program Statistics are not applicable for this reporting period

* Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D.	<input style="width: 50px; border: 1px solid gray;" type="text" value="0.0"/> %
* Average Time to Ph.D. for Trainees in the Last 10 Years (not including leaves of absence)	<input style="width: 50px; border: 1px solid gray;" type="text" value="0.0"/> Year

Figure 37: Program Statistics (RPPR)

The **Program Statistics** section is only available for training grants that have Predoctorate Trainees.

1. Enter the program statistics as follows:
 - Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D.
 - Average Time to Ph.D. for Trainees in the Last 10 Years (not including leaves of absence)
2. Select the **Save Program Statistics** button.

Use the checkbox to indicate that **Program Statistics are not applicable for this reporting period**.

6.10 Preview PDF (RPPR)

Select the **Preview PDF** link to open save, and/or print the training tables. An *In Progress* watermark will be printed on the *Training Table* PDF until the RTD is finalized.

6.11 Finalize RTD (RPPR)

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.

A confirmation message warns: *Once finalized the Research Training Data cannot be edited. Are you sure you want to continue?*

IMPORTANT: 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.

xTRACT generates a PDF version of the training tables without the *In Progress* watermark, updates the status of the RTD to *Final*, and locks the RTD for editing.

If data are needed to finalize the RPPR RTD, the appropriate error message(s) display as follows:

- *Missing Required Data: Start Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.*

- *Missing Required Data: End Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.*

All trainees must have a start date in the **In Training Data** section. Additionally, trainees with **No** selected for **In Training** status must have an end date.

7 Prepare RTD for a Renewal Application

To access the screen:

1. Search for the training grant on the *Search for Training Grants* screen. Refer to the topic titled [Search for Training Grants on Page 5](#) for steps.
2. From the **Action** column of the search results, select the appropriate link to access the *Prepare for Research Training Data Set (RTD) for Renewal* screen:
 - To initiate the RTD for the renewal application: Select the **Prepare for Renewal** link.
 - To continue working on an initiated RTD: Select the **Continue for Renewal** link.

The *Prepare Research Training Dataset (RTD) for Renewal* screen opens for the selected training grant.

Use the links listed under **RTD** on the left side of the screen to maintain the specific sections of the RTD:

- **Participating Departments/Programs**
- **Training Support & Summary**
- **Participating Faculty**
- **Participating Trainees**
- **Program Statistics**
- **Applicants and Entrants**
- **Appointments**
- **Preview PDF**
- **Finalize RTD**

Selecting the links above opens the specific section of the RTD. From within, you can add, edit, and/or remove data.

7.1 *Participating Departments and Programs (Renewal)*

Use this section to add/remove departments and programs.

7.2 Add Departments

1. Select the **Add Departments** button.

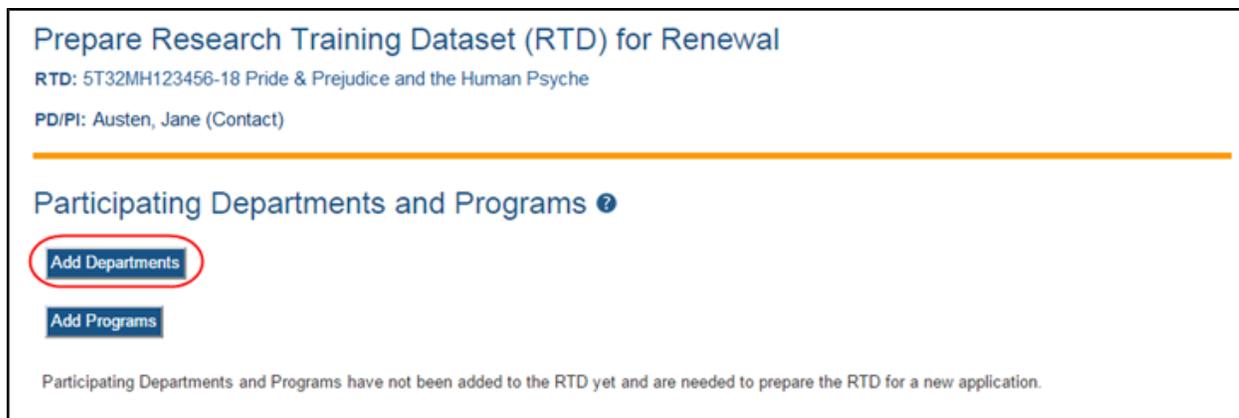


Figure 38: Adding Departments

2. Select the **Search Departments** button to search for departments in the Institution. You can narrow down the results by first entering the **Department Name**.

Tip: You may use the percent sign (%) as a wildcard at the start, at the end, or in the middle of your criteria.

3. Find the appropriate department in the results list and select the corresponding **Add Department** link from the **Action** column. Major Components are also displayed with the Department to differentiate among departments with the same name in different units of the organization.

The **Action** column updates to show *Added* for the added department. You can repeat the step to **Add Department** for as many departments as necessary.

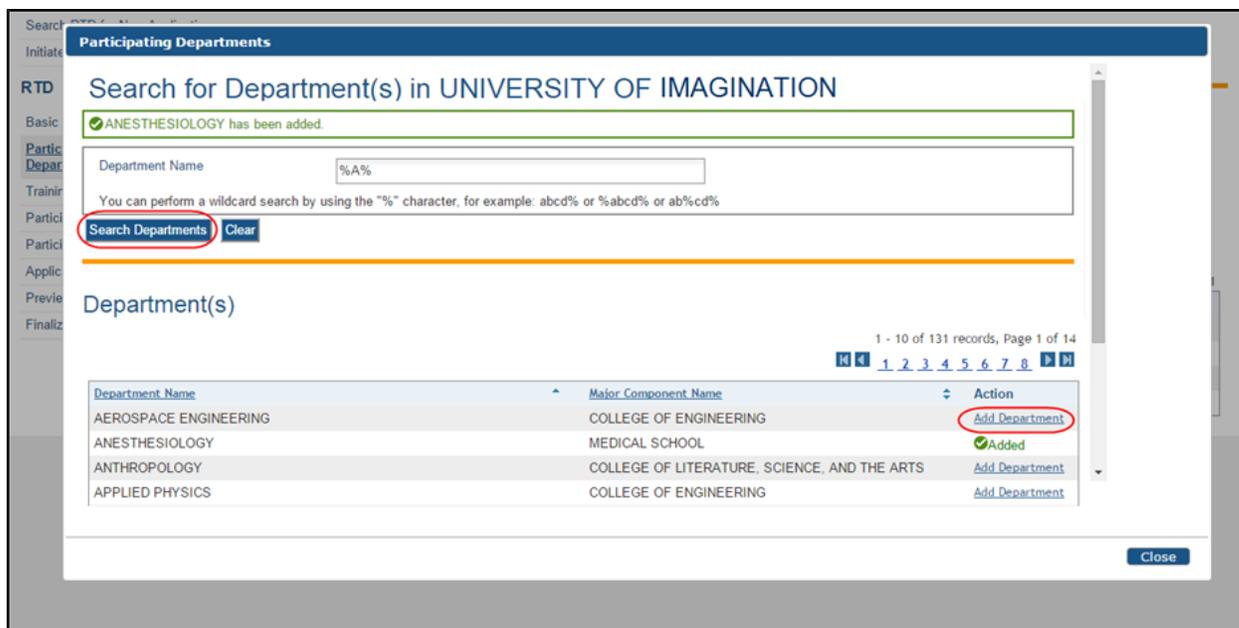


Figure 39: Searching for Departments

4. Select the **Close** button to close the screen.

The *Prepare RTD* screen updates to show the added department(s) in a table. Added programs and departments display in the same table. The **Actions** column includes links for removing and editing the programs and departments.

7.3 Add Programs

1. Select the **Add Programs** button.

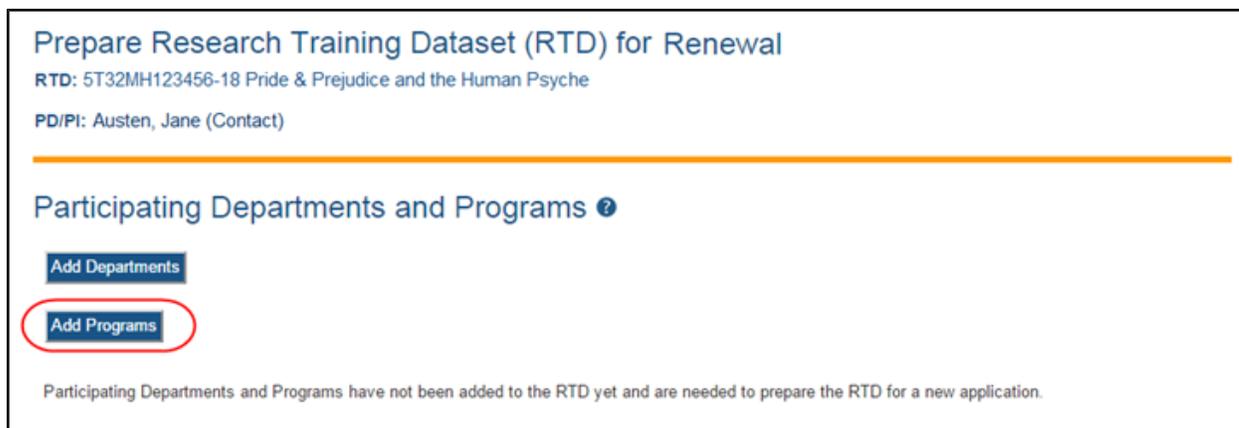


Figure 40: Add Programs Button

2. Select the **Search** button. You can narrow down the results by first entering the **Program Name** and/or **Program Description**.

Tip: You may use the percent sign (%) as a wildcard at the start, at the end, or in the middle of your criteria.

- Find the appropriate program in the results list and select the corresponding **Add Program** link from the **Action** column.

The **Action** column updates to show *Added* for the added program. You can repeat the step to **Add Program** for as many programs as necessary.

To add a Program not available in the search results, select **Create Program**. Add **Program Name** (required) and **Program Description** (optional) and select **Create Program and Add to New Application**.

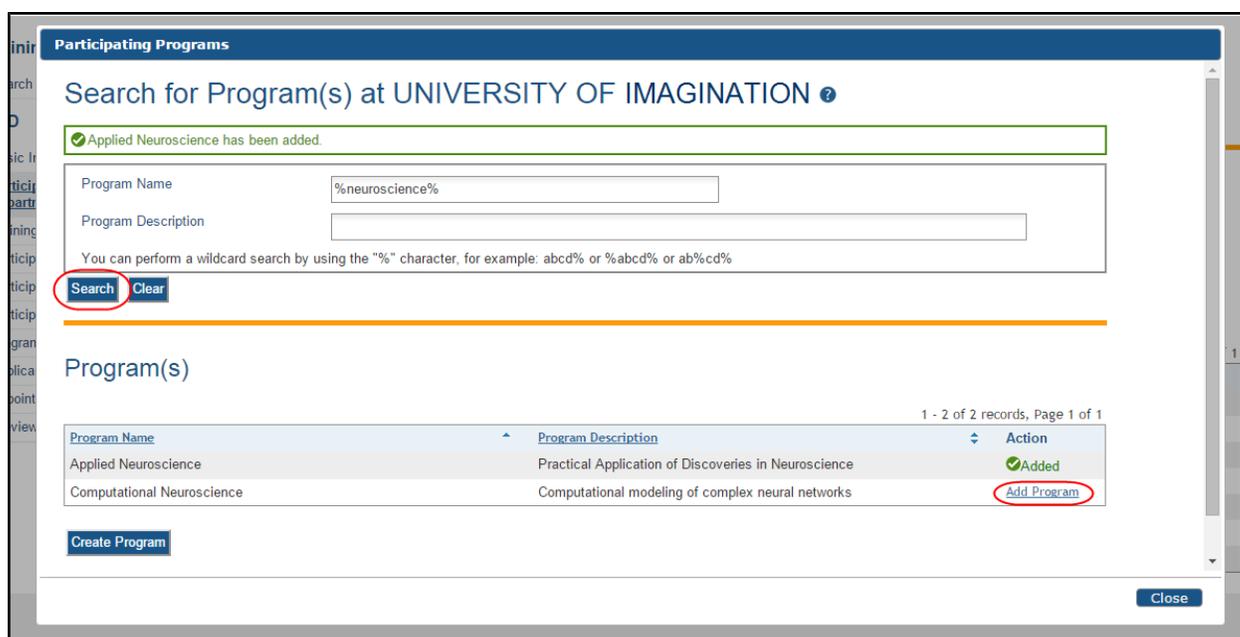


Figure 41: Searching for Programs

- Select the **Close** button to close the screen.

The *Prepare RTD* screen updates to show the added program(s) in a table. Added programs and departments display in the same table. The **Actions** column includes links for removing and editing the programs and departments.

7.4 Edit Departments & Programs

To edit a program or department, select the **Edit** link from the **Actions** column.



Figure 42: Edit Link for Programs and Departments

Update the Census information as necessary.

Faculty

- Total
- Participating

Predocorates

- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

Postdoctorates

- Total
- Supported by any HHS Training Award
- Postdocs with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

Prepare Research Training Dataset (RTD) for Renewal

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche

PD/PI: Austen, Jane (Contact)

Participating Department/Program Detail [?](#)

HEALTH MANAGEMENT AND POLICY/SCHOOL OF PUBLIC HEALTH

Census

Faculty

Total	<input type="text" value="0"/>
Participating	<input type="text" value="0"/>

Predoctorates

Total	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Students with Participating Faculty	<input type="text" value="0"/>
Eligible Students with Participating Faculty	<input type="text" value="0"/>

Postdoctorates

Total	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Postdocs with Participating Faculty	<input type="text" value="0"/>
Eligible Postdocs with Participating Faculty	<input type="text" value="0"/>

Figure 43: Participating Department/Program Detail

Select the **Save and Close** button to save the information.

7.4.1 Participating Department/Program Detail (Renewal)

7.5 Edit Departments & Programs

To edit a program or department, select the **Edit** link from the **Actions** column.



Figure 44: Edit Link for Programs and Departments

Update the Census information as necessary.

Faculty

- Total
- Participating

Predocorates

- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

Postdoctorates

- Total
- Supported by any HHS Training Award
- Postdocs with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

Prepare Research Training Dataset (RTD) for Renewal
RTD: 5T32MH123456-18 *Pride & Prejudice and the Human Psyche*
PD/PI: Austen, Jane (Contact)

Participating Department/Program Detail ?

HEALTH MANAGEMENT AND POLICY/SCHOOL OF PUBLIC HEALTH

Census

Faculty

Total	<input type="text" value="0"/>
Participating	<input type="text" value="0"/>

Predocotorates

Total	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Students with Participating Faculty	<input type="text" value="0"/>
Eligible Students with Participating Faculty	<input type="text" value="0"/>

Postdoctorates

Total	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Postdocs with Participating Faculty	<input type="text" value="0"/>
Eligible Postdocs with Participating Faculty	<input type="text" value="0"/>

Figure 45: Participating Department/Program Detail

Select the **Save and Close** button to save the information.

7.6 Training Support & Summary (Renewal)

Displays the read-only totals of the following:

- Average Grant Support per Participating Faculty Member
- Total Number of Predoc Positions
- Total Number of Postdoc Positions
- Total Number of Short-Term Positions

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.

Prepare Research Training Dataset (RTD) for Renewal

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche

PD/PI: Austen, Jane (Contact)

Training Support & Summary ?

Average Grant Support per Participating Faculty Member	\$0
Total Number of Predoc Positions	0
Total Number of Postdoc Positions	0
Total Number of Short-Term Positions	0

Institutional Training Support Detail

NIH Sources of Support	Grant Title, Award Number, Project Period, PD/PI
	Really Great Sample Project Title , R01NS123456-01, 02/2013 to 02/2014, Bennet, Elizabeth Remove Edit

Add Institutional Training Support

Census Totals

Faculty Edit Please provide numbers for unique faculty members across the participating departments and interdepartmental programs.

Total	0
Participating	0

Predoc

Total	0
Supported by any HHS Training Award	0
Total Predoctorates with Participating Faculty	0
Eligible Students with Participating Faculty	0
TGE Predocs Supported by this Training Grant	0
Predocs Supported by this Training Grant (R90 Only)	0

Postdoc

Total	0
Supported by any HHS Training Award	0
Total Postdoctorates with Participating Faculty	0
Eligible Postdocs with Participating Faculty	0
TGE Postdocs Supported by this Training Grant	0
Postdocs Supported by this Training Grant (R90 Only)	0

Figure 46: Training Support & Summary

7.7 Institutional Training Support

To add additional support:

1. Select the **Add Institutional Training Support** button.

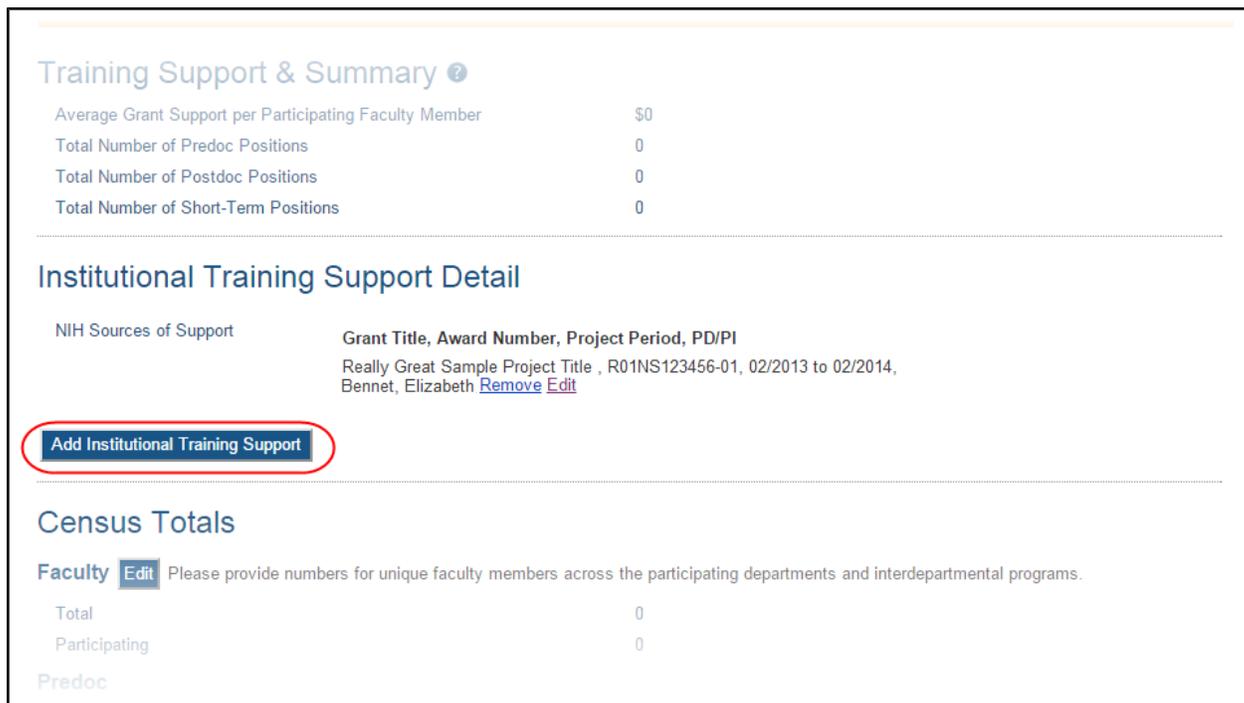


Figure 47: Add Institutional Training Support Button

2. Search for support by entering any of the criteria on the *Add Institutional Training Support* pop-up. You must enter either an IC Code or PD/PI Last Name.
 - Search Type
 - Activity Code
 - IC Code
 - Serial Number
 - Suffix Code
 - Start Date
 - End Date
 - PD/PI Last Name
 - Institution

Use the look up tool to search for and select an institution in the accompanying *Search for Institution(s)* pop up.

3. Select the **Search Funding Sources** button.

- From the result list, click the **Select** link from the **Action** column for the correct project.

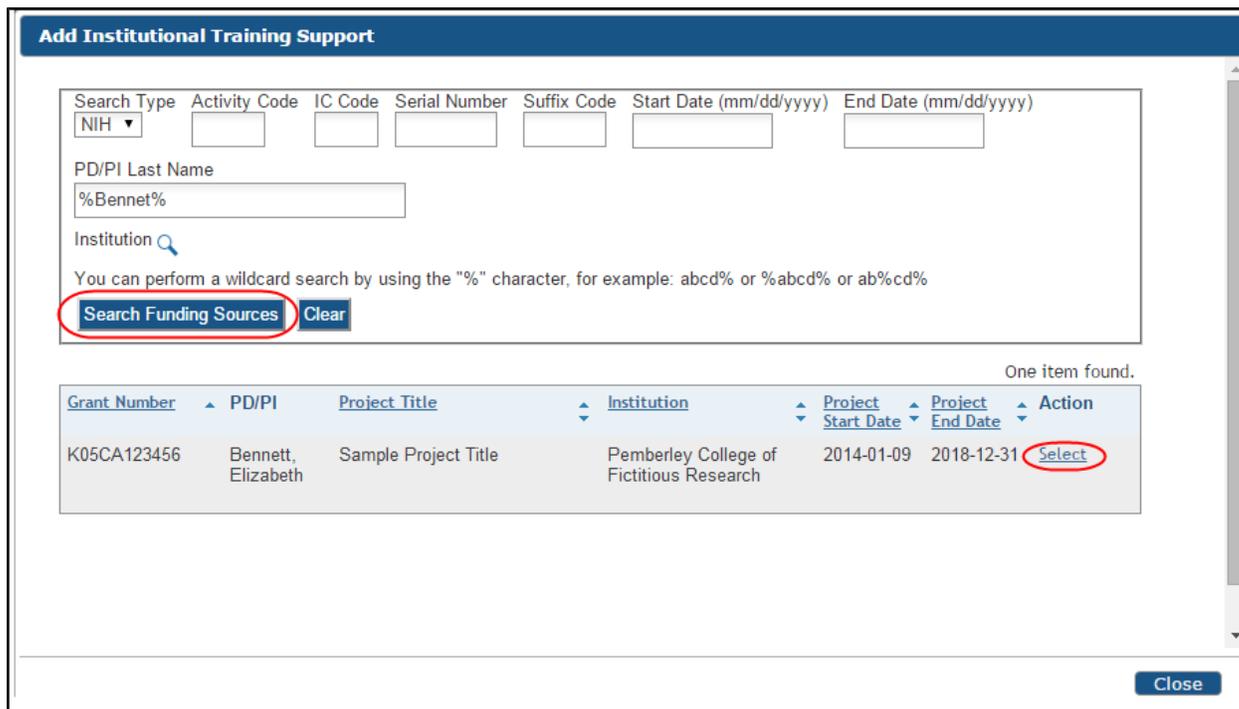


Figure 48: Searching for Funding Sources

The added source of support will display on the Prepare RTD screen.

Use the **Edit** and **Remove** links next to the record to update or remove the funding source as necessary.

7.8 Census Totals

Displays totals for Faculty, Predoctorates, and Postdoctorates.

Faculty

- Total
- Participating

Use the **Edit** button to add to or update the numbers for unique faculty members across participating departments and interdepartmental programs.

Predoc

The following read-only information is displayed. This data is maintained on the **Participating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Predoctorates with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

Postdoc

The following read-only information is displayed. This data is maintained on the **Participating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Postdoctorates with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

7.8.1 Institutional Training Support Detail (Renewal)

Select the **Edit** link on the **Institutional Training Support** section of the *Training Support & Summary* to open the *Institutional Training Support Detail* screen.

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 Renewal

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

Institutional Training Support Detail

Project Title: Really Great Sample Project Title
Grant Number: R01NS123456-01

Number of Trainee Positions [Edit](#)

Number of Predoc Positions	0
Number of Postdoc Positions	0
Number of Short-Term Positions	0
Number of Participating Faculty	

Overlapping Faculty

[Add Overlapping Faculty](#)

Number of Overlapping Faculty 1

Overlapping Faculty Name	Actions
Darcy, Fitzwilliam	Remove

One item found.

Figure 49: Institutional Training Support Detail

7.9 Number of Trainee Positions

Use this section to add the number of Predoc, Postdoc, Short-term, and Participating Faculty positions.

1. Select the **Edit** button.
2. In the *Institution Training Support* pop up, enter the appropriate totals.
3. Select the **Save Institution Training Grant** button.

7.10 Overlapping Faculty

Use this section to update the number of overlapping faculty.

1. Select the **Add Overlapping Faculty** button.

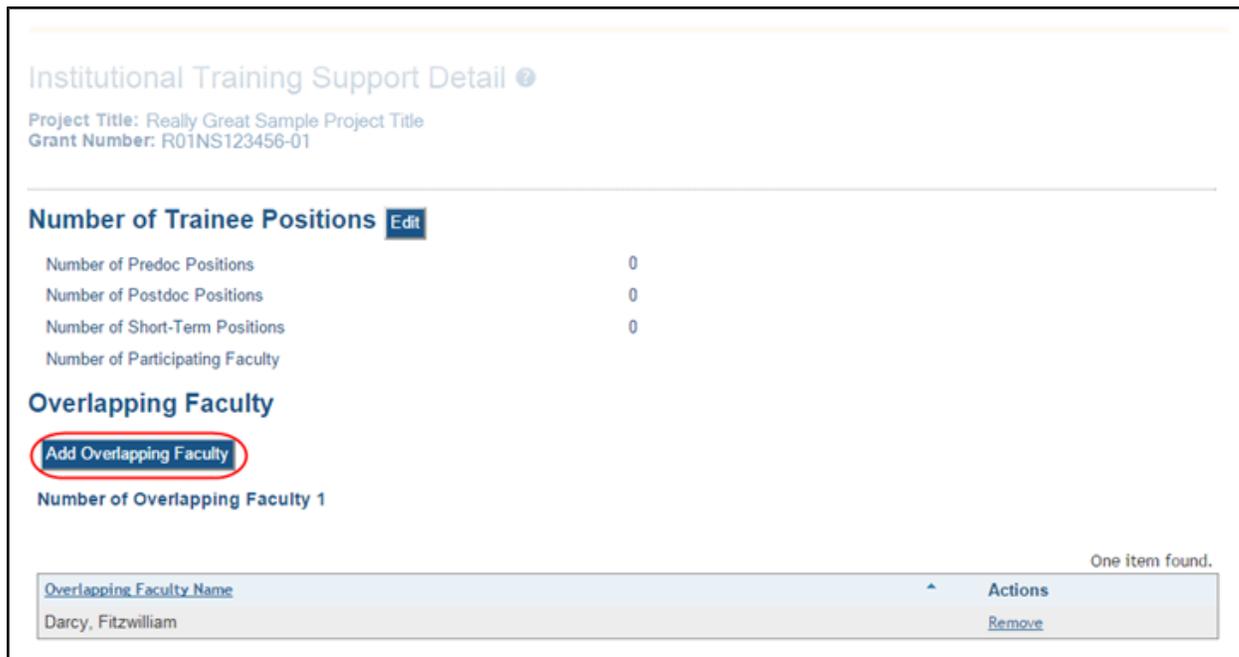


Figure 50: Add Overlapping Faculty Button

2. Search for faculty as necessary in the *Participating Faculty* pop-up.
3. In the **Action** column, select **Add Overlapping Faculty** for any participating faculty members that are also on the Institution Training Grant. If a needed faculty member does not display in the results, then add the faculty member as Participating Faculty as described in the topic titled [Participating Faculty Members \(Renewal\) on Page 76](#) for renewal applications.

The **Action** column updates with the word *Added*.

Participating Faculty				
Participating Faculty				
Show	10	Search: <input type="text"/>		
entries				
Person Name	Commons User ID	Person ID	Email	Action
Bingley, Charles	DARCYPAL	9123456	bingley@email.com	✓ Added
DeBurgh, Catherine	DARCYAUNT	1234567	deburgh@email.com	Add Overlapping Faculty
Showing 1 to 2 of 2 entries				Previous 1 Next
Close				

Figure 51: Adding Participating Faculty

4. Select the **Close** button.

The Overlapping Faculty Name displays on the *Institutional Training Support Detail* screen with the option to **Remove** the overlapping faculty member. The updated total count of the overlapping faculty is calculated by system and is displayed as read-only.

7.11 Participating Faculty Members (Renewal)

Displays the participating faculty added to the RTD - or a message indicating that no faculty have been added, when appropriate.

7.11.1 Add Faculty

To add faculty, select the **Add Faculty** button.

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution**.

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

2. Select the **Search Person** button.
3. All matching records display in the **Person(s)** table. Select the **Add Faculty** link to add the person to the RTD.

The top of the screen will indicate that *<Last Name>, <First Name> has been added*. The **Action** column will display the word *Added*.

Search Faculty
X

Search for Person(s)

* Either Commons User ID or Person ID or Last Name is required to perform person search.

* Commons User ID

* Person ID

First Name

Middle Name

* Last Name

Search for persons who have a Commons affiliation with my institution

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

Search Persons
Clear

Person(s)

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
McCulloch, Ian	EATBSINGER	7123456	UNIVERSITY OF IMAGINATION	eatb@email.com	✔ Added Add Faculty
McCulloch, Mac	ISMMAC	6543217	UNIVERSITY OF IMAGINATION	ismmac@3mail.com	

Showing 1 to 2 of 2 entries Previous 1 Next

Close

Figure 52: Search for Person

4. Search for and add other faculty as necessary, repeating the steps above.
5. Use the **Close** button to close the search screen when finished.

7.11.2 Edit Faculty

Use the **Edit** link in the **Actions** column to edit the participating faculty detail for the selected member. Refer to the topic titled *Participating Faculty Detail (Renewal) on Page 77*.

7.11.3 Remove

Select the **Remove** link in the **Actions** column to remove the faculty member from the RTD. At the confirmation, select **Yes**.

7.11.4 Participating Faculty Detail (Renewal)

Use the **View** links to display individual sections of the *Participating Faculty Detail*. The **Open All Sections** link reveals all collapsed sections at once.

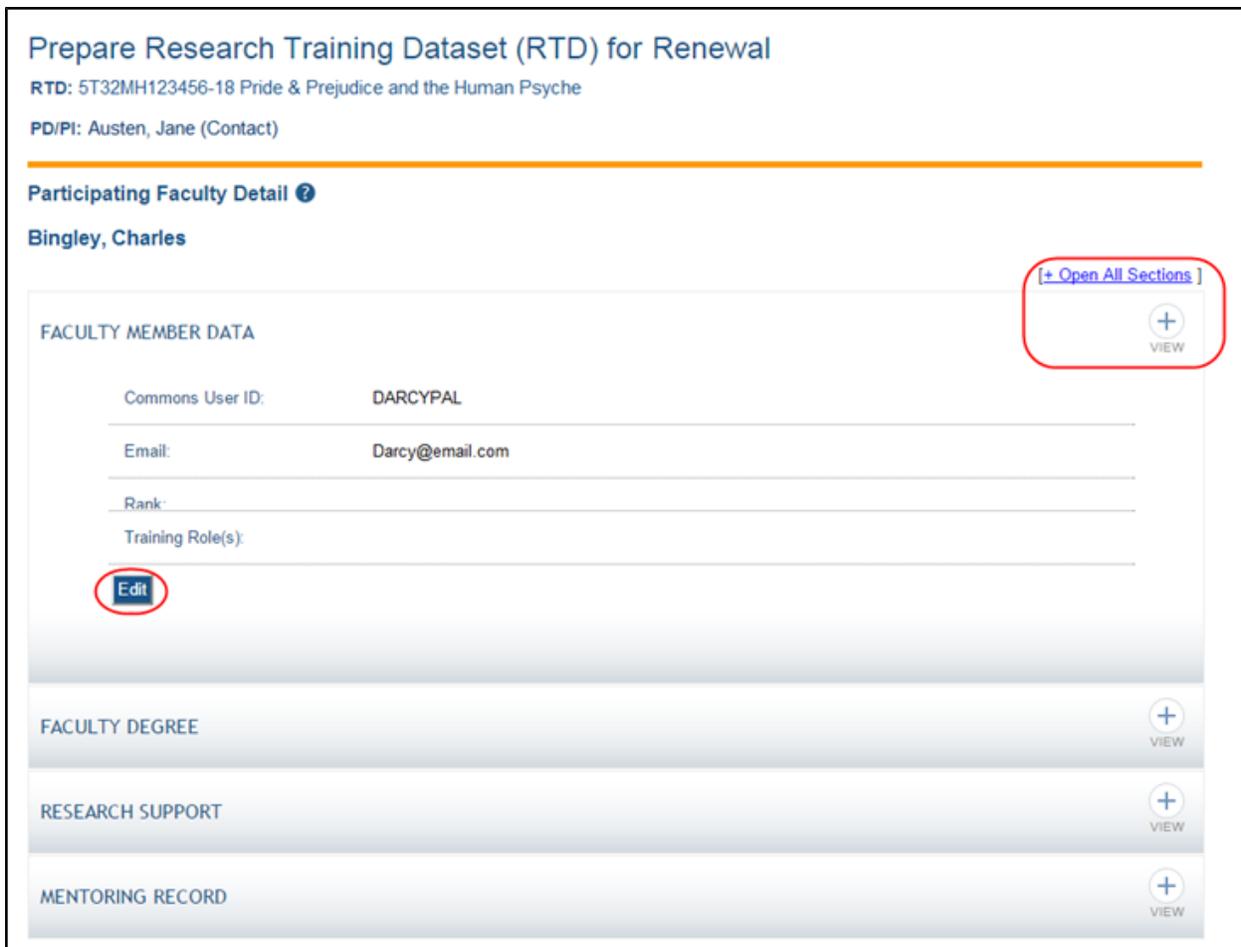


Figure 53: Participating Faculty Details

Each section provides a means for editing the information. Refer to the steps below.

7.12 Faculty Member Data

Use the **View** link in the **Faculty Member Data** panel of the *Participating Faculty Detail* to display faculty data as described below.

- **Commons User ID** (read only)
- **Email** (read only)
- **Rank**
- **Primary Department or Program**
- **Research Interest**
- **Training Role(s)**

Use the **Edit** button to open the fields in a pop-up for editing. Select **Save Member Data** to save your changes.

7.13 Faculty Degree

From this panel, you may add a degree, edit a degree, or select a degree to add to an RTD.

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

7.13.1 Add a Degree

1. Select the **Add Another Degree** button.
2. Update the fields in the *Faculty Degree* pop-up:
 - **Degree**: Select from the list
 - **Other Degree Text**: Enter if the Degree selected is *OTH* (*other type of degree*).
 - **Degree Date**: Enter in MM/YYYY format
 - **Terminal Degree**: Select the **Yes** or **No** radio button as appropriate. When the **Yes** button is selected, the terminal degree indicator (*This is the terminal degree of this person.*) displays next to the degree details in the view. Only one degree for a person can be set as the Terminal Degree.
 - **Degree Status**: Completed is the only selection available for Faculty degrees.
 - **Degree Institution**: Enter the institution name, one institution per degree. You can search for an institution by selecting the magnifying glass search icon.
3. Select the **Save** button to save your changes.
4. Repeat for any additional degrees.
5. Select the **Close** button when finished.

7.13.2 Edit a Degree

1. Use the **Edit** button next to a listed degree to display the *Faculty Degree* pop-up for editing.
2. Updates the fields as necessary.
3. Select the **Save** button followed by the **Close** button.

7.13.3 Include in RTD

1. Locate the degree you are including in the RTD.
2. Check the **Include in RTD** box for the degree to be displayed in the **Participating Faculty Members Training Table** on the RTD PDF. Up to three degrees can be selected to include in the RTD.

Uncheck the box to exclude the degree.

7.13.4 Delete a Degree

Select the **Delete** link to delete the degree from the participating faculty detail. Delete degree is not available if the **Source** of the degree is *Commons Profile*, meaning the degree is from the Commons Personal Profile of the person.

7.14 Research Support

7.14.1 NIH Sources of Support

Includes the NIH Grant number, Project Title, Period of Support. This information is displayed as read-only.

7.14.2 Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date. xTRACT displays as read-only current NIH support held by the faculty member.

To add additional support:

1. Select the **Add Another Support** button to display fields for searching/editing to add a non-NIH funding source.
2. Search for a funding source:
 - a. Select the magnifying glass icon next to the **Funding Source** field.
 - b. Search for support entering the parameters given and selecting **Search Funding Sources** button.
 - c. From the result list, click the **Select** link from the **Action** column for the correct project.
3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
4. Select an option from the **Role during funding** drop-down.
5. Select **Save**.
6. Repeat the search to add more.
7. Select **Close** when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

7.15 Mentoring Record

Use the **View** link in the **Mentoring Record** panel of the *Participating Faculty Detail* to display in number of mentors.

- Predocs In Training
- Predocs Graduated

- Predocs Continued in Research or Related Careers
- Postdocs in Training
- Postdocs Completed Training
- Postdocs Continued in Research or Related Careers

Use the **Edit** button to open the fields in a pop-up for editing. Save your changes by selecting the **Save Mentoring Records** button on the pop-up.

7.16 Students (Renewal)

If both Predoc and Postdoc participating trainees are included in the RTD for the Renewal, this menu item will not be available. If only Predoc trainees are included, then Postdoc Students can be added. If only Postdoc trainees are included, then Predoc Students can be added.

This section displays the students added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove students.

Prepare Research Training Dataset (RTD) for Renewal

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche

PD/PI: Austen, Jane (Contact)

Students ?

[Add Student](#)

One item found.

Student Name	Commons User ID	Person ID	Student Type	Actions
Lucas, Charlotte	EBFRIEND	9876543	Pre-doc	Edit Remove

Figure 54: Students

Students(s) are listed in a table at the bottom of the screen along with the following information:

- **Student Name**
- **Commons User ID** (if available)
- **Person ID**
- **Student Type**: Pre-doc or Post-doc
- **Actions**
 - The **Edit** link opens the *Student Detail* for the selected trainee. Refer to the topic titled [Student Detail for a Renewal \(Renewal\) on Page 83](#).

- The **Remove** link removes the person from the RTD.

The **Add Student** feature allows you to search for and add students or create new xTRACT persons to add to the RTD.

7.17 Add Student

To add a student:

1. Select the **Add Student** button.
2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

NOTE: You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

3. All matching records display in the **Person(s)** table. Select the **Add Student** link in the **Action** to add the person.

NOTE: After you perform a search, the **Create xTRACT Person** button is enabled. Use this button to create an xTRACT person record. Refer to the topic titled [Create xTRACT Person on Page 165](#)

4. Select the **Student Type** from the pop-up box and click **OK**.
5. Repeat for any to add other students. Added students appear in the **Person(s)** list with the word *Added* shown in the **Action** column.
6. Use the **Close** button to close the search screen.

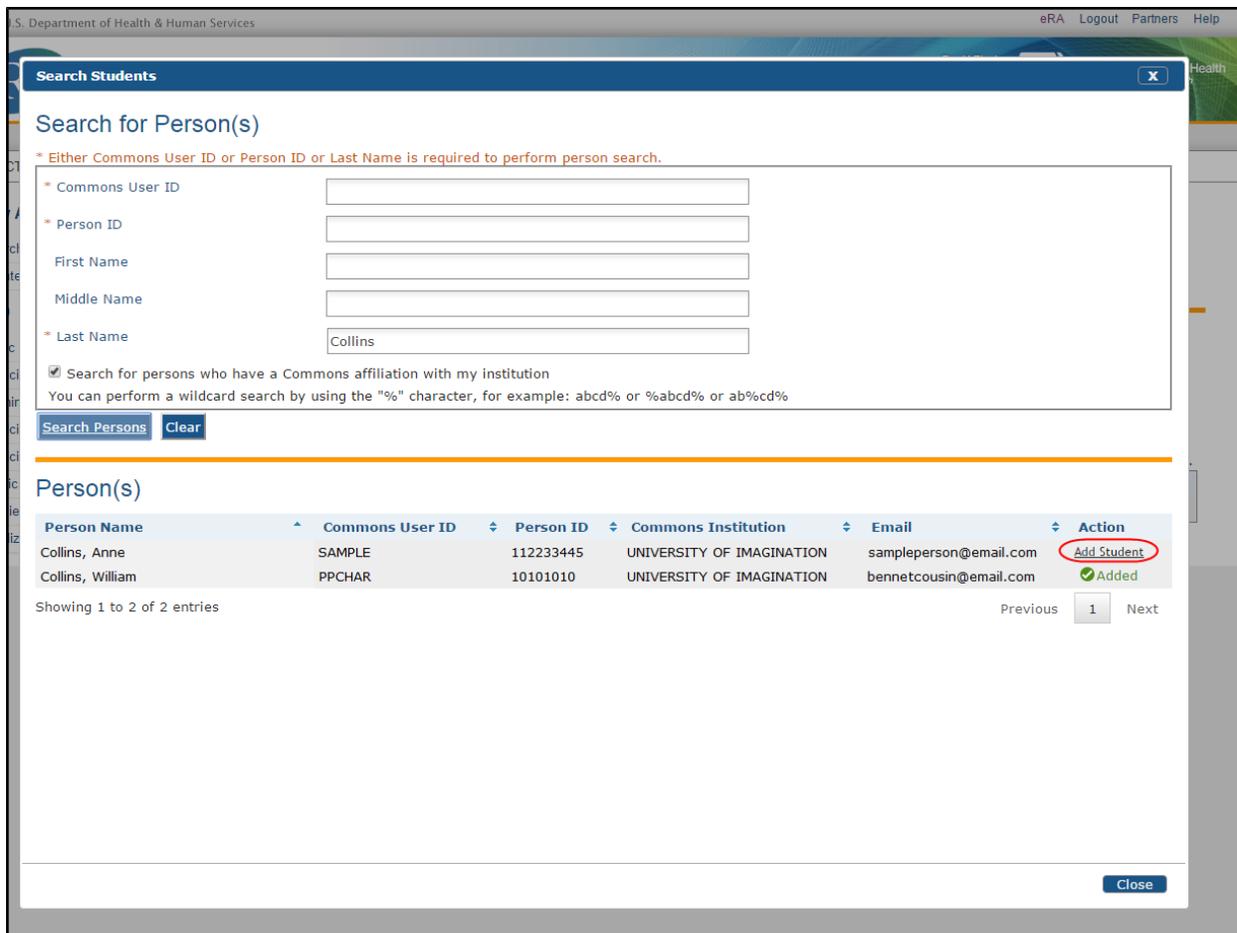


Figure 55: Search for Students

7.18 Edit Student

From the list of students, select the **Edit** link in the **Actions** column to edit the student detail.

Refer to the topic titled [Student Detail for a Renewal \(Renewal\) on Page 83](#).

7.19 Remove

Select the **Remove** link in the **Actions** column to remove the student from the RTD. At the confirmation, select **Yes**.

7.19.1 Student Detail for a Renewal (Renewal)

Use the **View** links to display individual sections of the *Student Detail*. The **Open All Sections** link reveals all collapsed sections at once.

Prepare Research Training Dataset (RTD) for Renewal
RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche
PD/PI: Austen, Jane (Contact)

Student Detail ⓘ
LUCAS, CHARLOTTE (Pre-Doc)

[\[+ Open All Sections \]](#)

STUDENT DATA	
Commons User ID:	EBFRIEND
Email:	clucas@email.com

IN TRAINING DATA	+ VIEW
FACULTY MEMBERS	+ VIEW
DEGREES	+ VIEW
POST-TRAINING POSITIONS	+ VIEW
SUBSEQUENT GRANTS	+ VIEW
PUBLICATIONS	+ VIEW

Figure 56: Student Detail (Renewal)

Each section provides a means for viewing or editing the information. Refer to the steps below.

7.20 Student Data

Use the **View** link in the **Student Data** panel of the *Student Detail* to display the following read-only information:

- Commons User ID or Person ID
- Email

7.21 In Training Data

Use the **View** link in the **In Training Data** panel of the *Student Detail* to display in training data as described below. Use the **Edit** button to open the fields in a pop-up for editing.

- In Training
- Type
- Research Topic
- Start Date
 - Into Current Degree-Granting Program, for a Predoctoral trainee
 - Into Postdoctoral Research, for Postdoctoral trainee
- End Date (when Trainee Left Program)

7.22 Faculty Members

Displays the faculty member for the student on the RTD.

To add faculty, select the **Add Faculty** button.

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution**.

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

2. Select the **Search Person** button.
3. All matching records display in the **Person(s)** table. Select the **Add Faculty** link to add the person to the RTD.

The top of the screen will indicate that *<Last Name>, <First Name> has been added*. The **Action** column will display the word *Added*.

Search Faculty

Search for Person(s)

* Either Commons User ID or Person ID or Last Name is required to perform person search.

* Commons User ID

* Person ID

First Name

Middle Name

* Last Name

Search for persons who have a Commons affiliation with my institution
 You can perform a wildcard search by using the "%" character, for example: abcd% or %abcd% or ab%cd%

[Search Persons](#) [Clear](#)

Person(s)

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
McCulloch, Ian	EATBSINGER	7123456	UNIVERSITY OF IMAGINATION	eatb@email.com	Added
McCulloch, Mac	ISMMAC	6543217	UNIVERSITY OF IMAGINATION	ismmac@3mail.com	Add Faculty

Showing 1 to 2 of 2 entries

Previous **1** Next

[Close](#)

Figure 57: Search for Person

4. Search for and add other faculty as necessary, repeating the steps above.
5. Use the **Close** button to close the search screen when finished.

To remove a faculty member from the RTD, select the **Delete** link from the **Action** column.

7.23 Degrees

xTRACT displays a list of completed degrees and associated data in reverse chronological order, with incomplete degrees following.

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

To add a degree:

1. Select the **Add Degree** button.
2. Update the fields in the *Create a New Degree* pop-up:

- **Degree:** Select from the list
 - **Other Degree Text:** Enter if Degree selected is *OTH (other type of degree)*.
 - **Degree Date:** Enter in MM/YYYY format
 - **Terminal Degree:** Select the **Yes** or **No** . When **Yes** is selected, the terminal degree indicator (*This is the terminal degree of this person.*) displays next to the degree details in the view. Only one degree per person can be set as the Terminal Degree.
 - **Degree Status:** Select Completed or In Progress, as appropriate
 - **Received in Training:** Select Yes or No. Up to three degrees can be selected as Received in Training.
 - **Degree Institution:** Enter the institution name, one institution per degree. You can search for an institution by selecting the magnifying glass search icon.
3. Select the **Save** button to save your changes.
 4. Repeat for any additional degrees.
 5. Select the **Close** button when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the degrees as necessary. Degrees with *Commons Profile* as a **Source** cannot be deleted.

7.24 Post-Training Positions

Displays post-training positions employment information. The **Source** of positions is displayed as read-only as *xTRACT* (meaning the position was added or updated for the person in xTRACT) or as *Commons Profile* (meaning the position is from the Commons Personal Profile of the person).

To add employment:

1. Select the **Add Employment** button.
2. Provide the following information:
 - **Faculty Teaching Position:** Select from the list
 - Professor; Associate Professor; Assistant Professor; Instructor; Other
 - **Academic Administrative Position:** Select from the list
 - President; Vice President; Dean; Assistant or Associate Dean; Chairperson of Department (or Director); Other
 - **Primary Employment Indicator:** Select the **Yes**, **No**, appropriate.
 - **Full Time Employment Indicator:** Select **Full-Time** or **Part Time**
 - **Current/Initial Employment Indicator:** Select **Primary Current** or **Primary Initial**

- **Primary Activity:** Select from list
 - Research-intensive; Research-related; Further training; Other
 - **Employment Position:** Enter the position title for the employment. This is required.
 - **Institution:** Enter the institution or select the icon to open a search box
 - **Primary Department of Position:** Enter the department or select the icon to open a search box
 - **Start Date:** Select a date in MM/YYYY format. This is required.
 - **End Date:** Select a date MM/YYYY format.
3. Select the **Save** button to save your changes.
 4. Repeat to add another.
 5. Select **Close** to close the window.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the positions as necessary. Positions with a **Source** of *Commons Profile* cannot be deleted.

7.25 Subsequent Grants

NIH Sources of Support

Includes the NIH Grant number, Project Title, Period of Support.

To add additional NIH support:

1. Select the search icon next to **Funding Source** to open query fields.
 - a. Enter search criteria in the fields.
 - b. Select the **Search Funding Sources** button.
 - c. From the list, select the funding source by clicking the appropriate **Select** link in the **Action** column.
2. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
3. Select **Save**.
4. Repeat the search to add more.

Use the **Edit** and **Delete** links to update or remove the funding source as necessary.

Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date.

To add additional support:

1. Select the **Add Other Source of Support** button to open the *Edit/Add Sources of Support* pop-up.

Search for support or create new funding source:

To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- b. From the result list, click the link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
 - b. Update the fields. Required fields show a red asterisk (*).
 - c. Select **Save**.
2. Select an option from the **Role during funding** drop-down.
 3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
 4. Select **Save**.
 5. Repeat the search to add more.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

7.26 Publications

To add a publication:

1. Select the **Add Publication** button.
2. From the *Edit/Add Publication* pop-up, enter the required information:
 - Publication (Authors, Year, Title, Journal, Volume, Inclusive Pages)
 - Faculty Member

To search for a faculty member, click the magnifying glass icon to open *Search for Person (s)* pop-up.

- a. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

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

- b. All matching records display in the **Person(s)** table. Click the **Select Faculty** link to add the person. This will populate the name into the *Edit/Add Publication* pop-up, which will display on your screen once again.
3. Select the **Save** button to save the information. You will see a confirmation at the top of the pop-up.
4. Select the **Close** button to return to the *Student Detail* screen.

To indicate no publications, mark the checkbox titled **Check this box if there are no publications for this trainee.**

If there are no publications checked:

1. Select a reason for **No Publications** from the drop-down list.
2. Search for and select a faculty member.
3. Select the **Save** button to save the information.

Use the **Edit** and **Delete** buttons next to a specific publication to update or remove that record.

7.27 Participating Trainees (Renewal)

Displays the participating trainees added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove participating trainees.

The screenshot shows the 'Prepare Research Training Dataset (RTD) for Renewal' interface. At the top, it displays the RTD ID (5T32MH123456-18), the title 'Pride & Prejudice and the Human Psyche', the PI (Austen, Jane), and the reporting period (09/01/1998 - 07/31/2015). Below this is a section for 'Participating Trainees' with an 'Add Trainee' button. A table lists two trainees: William Collins and Charlotte Lucas. The table has columns for Person Name, Commons User ID, Person ID, Trainee Type, Start Date, End Date, and Actions (Edit, Remove). Navigation controls for the table are visible above the table, showing '1 - 50 of 53 records, Page 1 of 2'.

Person Name	Commons User ID	Person ID	Trainee Type	Start Date	End Date	Actions
Collins, William	PPCHAR	9123456	Post-doc	2014/10		Edit Remove
Lucas, Charlotte	BENNETPAL	12345678	Post-doc			Edit Remove

Figure 58: Participating Trainees

Participating trainee(s) are listed in a table at the bottom of the screen along with the following information:

- **Person Name**
- **Commons User ID** (if available)
- **Person ID**
- **Trainee Type**: Pre-doc; Post-doc; Short Term
- **Start Date**
- **End Date**
- **Actions**
 - The **Edit** link opens the *Participating Trainee Detail* for the selected trainee. Refer to the topic titled [Participating Trainee Detail \(Renewal\)](#) on Page 92.
 - The **Remove** link removes the person from the RTD.

The **Add Trainee** feature allows you to search for and add existing trainees or create new xTRACT persons to add to the RTD.

7.28 Add Trainee

To add a trainee:

1. Select the **Add Trainee** button.
2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

NOTE: You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

3. All matching records display in the **Person(s)** table. Select the **Add Trainee** link in the **Action** to add the person.

NOTE: After you perform a search, the **Create xTRACT Person** button is enabled. Use this button to create an xTRACT Person record. Refer to the topic titled [Create xTRACT Person on Page 165](#)

4. Select the **Trainee Type** from the pop-up box: Pre Doctoral, Post Doctoral, or Short Term and click **OK**.
5. Repeat for any to add other students. Added students appear in the **Person(s)** list with the word *Added* shown in the **Action** column.
6. Use the **Close** button to close the search screen.

7.29 **Edit Trainee**

From the list of trainees, select the **Edit** link in the **Actions** column to edit the trainee detail for the selected trainee.

Refer to the topic titled [Participating Trainee Detail \(Renewal\)](#) on Page 92.

7.30 **Remove**

Select the **Remove** link in the **Actions** column to remove the trainee from the RTD. At the confirmation, select **Yes**.

7.30.1 **Participating Trainee Detail (Renewal)**

While preparing an RTD for a Renewal, you can open the *Participating Trainee Detail* for a trainee by selecting that trainee's **Edit** link. The *Participating Trainee Data* for the selected person is grouped into panels. Use the **View** and **Edit** buttons and links to display and edit the information as detailed below.

Prepare Research Training Dataset (RTD) for Renewal

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche

PD/PI: Austen, Jane (Contact)

Participating Trainee Detail ⓘ

Lucas, Charlotte (Post-doc)

[\[+ Open All Sections \]](#)

TRAINEE DATA	
Commons User ID:	BENNETPAL
Email:	clucas@email.com

IN TRAINING DATA	+ VIEW
FACULTY MEMBERS	+ VIEW
SUPPORT DURING TRAINING	+ VIEW
DEGREES	+ VIEW
POST-TRAINING POSITIONS	+ VIEW
SUBSEQUENT GRANTS	+ VIEW
PUBLICATIONS	+ VIEW

Figure 59: Participating Trainee Detail (Renewal)

IMPORTANT: The information displayed in the trainee detail is comprised of information pulled from the trainee's eRA Commons Personal Profile, where available. However, updates made to the xTRACT trainee detail will not update that trainees Personal Profile in Commons.

7.31 Trainee Data

Use the **View** link in the **Trainee Data** panel of the *Participating Trainee Detail* to display the following read-only information, as applicable:

- Person ID or Commons ID
- Email

7.32 *In Training Data*

Use the **View** link in the **In Training Data** panel of the *Participating Trainee Detail* to display in training data as described below. Use the **Edit** button to open the fields in a pop-up for editing.

- In Training
- Type
- Research Topic
- Start Date
 - Current Degree-Granting Program for a Predoctoral trainee
 - Postdoctoral Research for Postdoctoral trainee
- End Date (when Trainee Left Program)

NOTE: In order to finalize the RTD for an RPPR, all trainees must have a start date in the **In Training Data** section. Additionally, trainees with *No* selected for **In Training** status must have an end date.

7.33 *Faculty Members*

Displays the participating faculty added to the RTD.

To add faculty, select the **Add Faculty** button.

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution**.

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

2. Select the **Search Person** button.
3. All matching records display in the **Person(s)** table. Select the **Add Faculty** link to add the person to the RTD.

The top of the screen will indicate that *<Last Name>, <First Name> has been added*. The **Action** column will display the word *Added*.

Search Faculty
X

Search for Person(s)

* Either Commons User ID or Person ID or Last Name is required to perform person search.

* Commons User ID

* Person ID

First Name

Middle Name

* Last Name

Search for persons who have a Commons affiliation with my institution

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

Search Persons
Clear

Person(s)

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
McCulloch, Ian	EATBSINGER	7123456	UNIVERSITY OF IMAGINATION	eatb@email.com	✔ Added Add Faculty
McCulloch, Mac	ISMMAC	6543217	UNIVERSITY OF IMAGINATION	ismmac@3mail.com	

Showing 1 to 2 of 2 entries Previous 1 Next

Close

Figure 60: Search for Person

4. Search for and add other faculty as necessary, repeating the steps above.
5. Use the **Close** button to close the search screen when finished.

To remove a faculty member from the RTD, select the **Delete** link in the **Action** column.

7.34 Support During Training

NOTE: This section applies to pre-doc and and post-doc trainees only.

Sources of support, both within and outside of NIH, can be maintained in this section. Click on the collapsed panel to display the information.

After a start date has been added for the trainee in *In Training Data*, the **Training Years (TYs)** will be displayed as read-only with corresponding abbreviations for funding sources in **Support During Training**.

This NIH Training Grant

Includes the NIH Grant number , Project Title, Period of Support.

Click the **Add This NIH Source of Support** to add support from **This NIH Training Grant**. Enter the **Start of Funding** and **End of Funding**. To remove support from **This NIH Training Grant**, select **Delete All from This NIH Funding Source of Support**.

NIH Sources of Support

Includes the NIH Grant number, Project Title, Period of Support.

To add additional NIH support:

1. Select the search icon next to **Funding Source** to open query fields.
 - a. Enter search criteria in the fields.
 - b. Select the **Search Funding Sources** button.
 - c. From the list, select the funding source by clicking the appropriate **Select** link in the **Action** column.
2. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
3. Enter the **Other role description** if *Other* was selected for **Role during funding**.
4. Select **Save**.
5. Repeat the search to add more.

Use the **Edit** and **Delete** links to update or remove the funding source as necessary.

Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date.

To add additional support:

1. Select the **Add Other Source of Support** button to open the *Edit/Add Sources of Support* pop-up.

Search for support or create new funding source:

To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- b. From the result list, click the link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
 - b. Update the fields. Required fields show a red asterisk (*).
 - c. Select **Save**.
2. Select an option from the **Role during funding** drop-down.
 3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
 4. Enter the **Other role description** if *Other* was selected for **Role during funding**.
 5. Select **Save**.
 6. Repeat the search to add more.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

7.35 Degrees

xTRACT displays a list of completed degrees and associated data in reverse chronological order, with incomplete degrees following.

To add a degree:

1. Select the **Add Degree** button.
2. Update the fields in the *Create a New Degree* pop-up:
 - **Degree**: Select from the list
 - **Other Degree Text**: Enter the name of the degree if an *OTH* type of degree was selected.
 - **Degree Date**: Enter in MM/YYYYY format
 - **Terminal Degree**: Select the **Yes** or **No** as appropriate. When **Yes** is selected, the terminal degree indicator (*This is your terminal degree.*) displays next to the degree details in the view. A person can only have one terminal degree.
 - **Degree Status**: Select Completed or In Progress, as appropriate
 - **Received in Training**: Select Yes or No. Up to three degrees can be set as Received in Training.
 - **Degree Institution**: Enter the institution name, one institution per degree. You can search for an institution by selecting the magnifying glass search icon.
3. Select the **Save** button to save your changes.
4. Repeat for any additional degrees.
5. Select the **Close** button when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the degree(s) as necessary. Degrees *Commons Profile* as the **Source** cannot be deleted.

7.36 **Post-Training Positions**

Displays post-training positions employment information.

To add employment:

1. Select the **Add Employment** button.
2. Provide the following information:
 - **Faculty Teaching Position:** Select from the list:
 - Professor; Associate Professor; Assistant Professor; Instructor; Other
 - **Academic Administrative Position:** Select from the list:
 - President; Vice President; Dean; Assistant or Associate Dean; Chairperson of Department (or Director); Other
 - **Primary Employment Indicator:** Select the **Yes** or **No**.
 - **Full Time Employment Indicator:** Select **Full-Time** or **Part-Time**
 - **Current/Initial Employment Indicator:** Select **Primary Current** or **Primary Initial**
 - **Primary Activity:** Select from list
 - Research-intensive; Research-related; Further training; Other
 - **Employment Position**
 - **Institution:** Enter the institution or select the icon to open a search box
 - **Primary Department of Position:** Enter the department or select the icon to open a search box
 - **Start Date:** Select a date in MM/YYYY format.
 - **End Date:** Select a date MM/YYYY format.
3. Select the **Save** button to save your changes.
4. Repeat to add another.
5. Select **Close** to close the window.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the position(s) as necessary. Positions with *Commons Profile* as the **Source** cannot be deleted.

7.37 **Subsequent Grants**

NIH Sources of Support

Includes the NIH Grant number, Project Title, Period of Support.

To add additional NIH support:

1. Select the search icon next to **Funding Source** to open query fields.
 - a. Enter search criteria in the fields.
 - b. Select the **Search Funding Sources** button.
 - c. From the list, select the funding source by clicking the appropriate **Select** link in the **Action** column.
2. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
3. Select **Save**.
4. Repeat the search to add more.

Use the **Edit** and **Delete** links to update or remove the funding source as necessary.

Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date.

To add additional support:

1. Select the **Add Other Source of Support** button to open the *Edit/Add Sources of Support* pop-up.

Search for support or create new funding source:

To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- b. From the result list, click the link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
 - b. Update the fields. Required fields show a red asterisk (*).
 - c. Select **Save**.
2. Select an option from the **Role during funding** drop-down.
 3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
 4. Select **Save**.
 5. Repeat the search to add more.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

7.37.0.1 Publications

To add a publication:

1. Select the **Add Publication** button.
2. From the *Edit/Add Publication* pop-up, enter the required information:
 - Publication (Authors, Year, Title, Journal, Volume, Inclusive Pages)
 - Faculty Member

To search for a faculty member, click the magnifying glass icon to open *Search for Person(s)* pop-up.

- a. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

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

- b. All matching records display in the **Person(s)** table. Click the **Select Faculty** link to add the person. This will populate the name into the *Edit/Add Publication* pop-up, which will display on your screen once again.
3. Select the **Save** button to save the information. You will see a confirmation at the top of the pop-up.
4. Select the **Close** button to return to the *Student Detail* screen.

To indicate no publications, mark the checkbox titled **Check this box if there are no publications for this trainee**.

If there are no publications checked:

1. Select a reason for **No Publications** from the drop-down list.
2. Search for and select a faculty member.
3. Select the **Save** button to save the information.

Use the **Edit** and **Delete** buttons next to a specific publication to update or remove that record.

7.38 Program Statistics (Renewal)

Prepare Research Training Dataset (RTD) for Renewal

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche
PI/PI: Austen, Jane (Contact)
RTD Reporting Period: 09/01/1998 - 07/31/2015

Program Statistics ?

Program Statistics are not applicable for this reporting period

* Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D. %

* Average Time to Ph.D. for Trainees in the Last 10 Years (not including leaves of absence) Year

Figure 61: Program Statistics (Renewal)

The **Program Statistics** section is only available for training grants that have Predoctorate Trainees.

1. Enter the program statistics as follows:
 - Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D.
 - Average Time to Ph.D. for Trainees in the Last 10 Years (not including leaves of absence)
2. Select the **Save Program Statistics** button.

Use the checkbox to indicate that **Program Statistics are not applicable for this reporting period**.

7.39 Appointments (Renewal)

Displays the training positions awarded and appointed, separately within two tables.

Prepare Research Training Dataset (RTD) for Renewal

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche

PD/PI: Austen, Jane (Contact)

Appointments ?

Training Positions Awarded

					Sum of Budget Years
Predoctoral Awarded	0	0	0	0	0
Postdoctoral Awarded	0	0	0	0	0
Short-Term Awarded	0	0	0	0	0

Training Positions Appointed

					Sum of Budget Years
Predoctoral Appointed					
Predoc Dual Degree					
Predoc Diverse Backgrounds					
Postdoctoral Appointed					
Postdoc MD or Equivalent					
Postdoc PhD or Equivalent					
Postdoc DDS, DVM, Other					
Postdoc Dual Degree					
Postdoc Diverse Backgrounds					
Short-Term Appointed					
Short-Term Diverse Backgrounds					

[Edit Appointments](#)

Figure 62: Appointments

7.40 Training Positions Awarded

The **Training Positions Awarded** table shows the number of awarded Predoctoral, Postdoctoral, and Short-Term appointments for each budget year. The last column of the table shows the sum of each appointment over all budget years.

This information is read-only.

7.41 Training Positions Appointed

The **Training Positions Appointed** table shows the number of appointed training positions for each budget year. The last column of the table shows the sum of each appointment over all budget years. Training positions include:

- Predoctoral Appointed
- Predoc Dual Degree
- Predoc Diverse Backgrounds
- Postdoctoral Appointed
- Postdoc MD or Equivalent
- Postdoc PhD or Equivalent
- Postdoc DDS, DVM, Other
- Postdoc Dual Degree
- Postdoc Diverse Backgrounds
- Short-Term Appointed
- Short-Term Diverse Backgrounds

Use the **Edit Appointments** button to open the table fields for editing. After updating the fields, select the **Save Appointments** button to save the information.

7.42 Applicants and Entrants (Renewal)

To enter Pre-doc and Post-doc applicants and entrants, first enter the start year of the most recently completed academic year and click the **Submit** button.

Select the **Pre-Doc Applicants and Entrants** and **Post-Doc Applicants and Entrants** links to display and enter data for the specific academic year(s).

Prepare Research Training Dataset (RTD) for Renewal

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche

PI/PI: Austen, Jane (Contact)

Applicants and Entrants ?

Start year of the most recently completed academic year:

The Pre-doc and Post-doc data may be edited via the links below, once the Start of the most recently completed academic year has been provided.

[Pre-Doc Applicants and Entrants](#)

[Post-Doc Applicants and Entrants](#)

Figure 63: Applicants and Entrants

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).

For example, let's say the first academic year is 2000-2001 and there are applicant/entrant data entered for that year. If the first academic year is changed to 2001-2002 by changing the most recently-completed academic year from 2001 to 2002, the same applicant/entrant data display for that first year.

7.42.1 Predoctoral Applicant and Entrant Counts and Characteristics (Renewal)

7.42.1.1 Edit the Counts and Characteristics

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit <X>** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save <X>** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

Prepare Research Training Dataset (RTD) for Renewal

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

[2014 - 2015](#)
[2013 - 2014](#)
[2012 - 2013](#)
[2011 - 2012](#)
[2010 - 2011](#)
[Summary](#)

Predocutorial Applicant and Entrant Counts and Characteristics ?

Counts

Department or Program	Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support
College of Imagination				
Department of Psychology				
Pharmacology				
School of Communication				
Total	0	0	0	0

[Edit Counts](#)

Characteristics

GPA

Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support
Mean GPA			
Lowest GPA			
Highest GPA			

[Edit GPA](#)

Research Experience

	New Entrants to the Program	New Entrants Eligible for Support
Mean Months of Prior, Full-Time Research Experience		
Lowest Number of Months of Prior, Full-Time Research Experience		
Highest Number of Months of Prior, Full-Time Research Experience		

[Edit Research Experience](#)

Prior Institutions

Institution	New Entrants to the Program	New Entrants Eligible for Support	Action
<input type="text" value="Search for Institution"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Add Prior Institution

Diversity

	New Entrants to the Program	New Entrants Eligible for Support
Percent with a Disability		
Percent from Underrepresented Racial & Ethnic Groups		

[Edit Diversity](#)

Figure 64: Predocutorial Applicant and Entrants Counts and Characteristics

7.43 Counts table

For Predocutorial Applicants and Entrants, Counts are entered by Participating Departments or Program. If a Department or Program is missing, refer to the topic titled [Participating Departments and Programs \(Renewal\)](#) on Page 63.

- Department or Program (read only)
- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

7.44 Characteristics

The following tables exist for Characteristics:

7.44.1 GPA

Enter the Mean GPA, Lowest GPA, and Highest GPA for the following:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

7.44.2 Research Experience

Enter the mean, lowest, and highest number of months of prior, full-time research experience for the following:

- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

7.44.3 Prior Institutions

Use the **Search for Institution** link to open a pop-up for searching and selecting an institution. Once the institution is selected and displayed on the table, select the **Add Prior Institution** link in the **Action** column.

Use the **Edit** and **Remove** links to modify or remove this data.

- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

7.44.4 Diversity

Enter the percent of entrants with a disability and the percent from under-represented racial and ethnic groups for the following:

- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

7.44.4.1 Summary of Counts and Characteristics

Select the **Summary** tab to display a summary for predoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.

To edit this information, refer to the above section of this topic.

7.44.5 Postdoctoral Applicant and Entrant Counts and Characteristics (Renewal)

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit <X>** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save <X>** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

Prepare Research Training Dataset (RTD) for Renewal

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche
 PD/PI: Austen, Jane (Contact)

2014 - 2015 | 2013 - 2014 | 2012 - 2013 | 2011 - 2012 | 2010 - 2011 | Summary

Postdoctoral Applicant and Entrant Counts and Characteristics ?

Counts

	Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support
PhDs				
MDs				
Dual-Degree Holders				
Other Degree Holders				
Total	0	0	0	0

[Edit Counts](#)

Characteristics

Publications

	Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support
Mean Number of Publications				
Lowest Number of Publications				
Highest Number of Publications				
Mean Number of First-Author Publications				
Lowest Number of First-Author Publications				
Highest Number of First Author Publications				

[Edit Publication](#)

Prior Institutions

Institution	New Entrants to the Program	New Entrants Eligible for Support	Action
<input type="text" value="Search for Institution"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Add Prior Institution

Diversity

	New Entrants to the Program	New Entrants Eligible for Support
Percent with a Disability		
Percent from Underrepresented Racial & Ethnic Groups		

[Edit Diversity](#)

Figure 65: Postdoctoral Applicant and Entrants Counts and Characteristics

7.45 Counts table

For PhDs, MDs, dual-degree holders, and other degree holders, update the following information:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

7.46 Characteristics

The following tables exist for Characteristics:

7.46.1 Publications

Enter the mean, lowest, and highest number of publications as well as the mean, lowest, and highest number of first author publications for the following:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

7.46.2 Prior Institutions

Use the **Search for Institution** link to open a pop-up for searching and selecting an institution. Once the institution is selected and displayed on the table, select the **Add Prior Institution** link in the **Action** column.

Use the **Edit** and **Remove** links to modify or remove this data.

- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

7.46.3 Diversity

Enter the percent of entrants with a disability and the percent from under-represented racial and ethnic groups for the following:

- New Entrants to the Program
- New Entrants Eligible for Support
- New Entrants Appointed to this Grant

7.46.3.1 Summary of Counts and Characteristics

Select the **Summary** tab to display a summary for postdoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.

To edit this information, refer to the above section of this topic.

7.47 Preview PDF (Renewal)

Select the **Preview PDF** link to open save, and/or print the training tables. An *In Progress* watermark will be printed on the *Training Table* PDF until the RTD is finalized.

7.48 Finalize RTD (Renewal)

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.

A confirmation message warns: *Once finalized the Research Training Data cannot be edited. Are you sure you want to continue?*

IMPORTANT: 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.

xTRACT generates a PDF version of the training tables without the *In Progress* watermark, updates the status of the RTD to *Final*, and locks the RTD for editing.

If data are needed to finalize the RPPR RTD, the appropriate error message(s) display as follows:

- *Missing Required Data: Start Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.*
- *Missing Required Data: End Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.*

All trainees must have a start date in the **In Training Data** section. Additionally, trainees with **No** selected for **In Training** status must have an end date.

8 Prepare RTD for a Revision Application

To access the screen:

1. Search for the training grant on the *Search for Training Grants* screen. Refer to the topic titled [Search for Training Grants on Page 5](#) for steps.
2. From the **Action** column of the search results, select the appropriate link to access the *Prepare for Research Training Data Set (RTD) for Revision* screen:
 - To initiate the RTD for the renewal application: Select the **Prepare for Revision** link.
 - To continue working on an initiated RTD: Select the **Continue for Revision** link.

The *Prepare Research Training Dataset (RTD) for Renewal* screen opens for the selected training grant.

Use the links listed under **RTD** on the left side of the screen to maintain the specific sections of the RTD:

- **Participating Departments/Programs**
- **Training Support & Summary**
- **Participating Faculty**
- **Participating Trainees**
- **Program Statistics**
- **Applicants and Entrants**
- **Appointments**
- **Preview PDF**

Selecting the links above opens the specific section of the RTD. From within, you can add, edit, and/or remove data.

8.1 *Participating Departments and Programs (Revision)*

Use this section to add/remove departments and programs.

8.2 Add Departments

1. Select the **Add Departments** button.

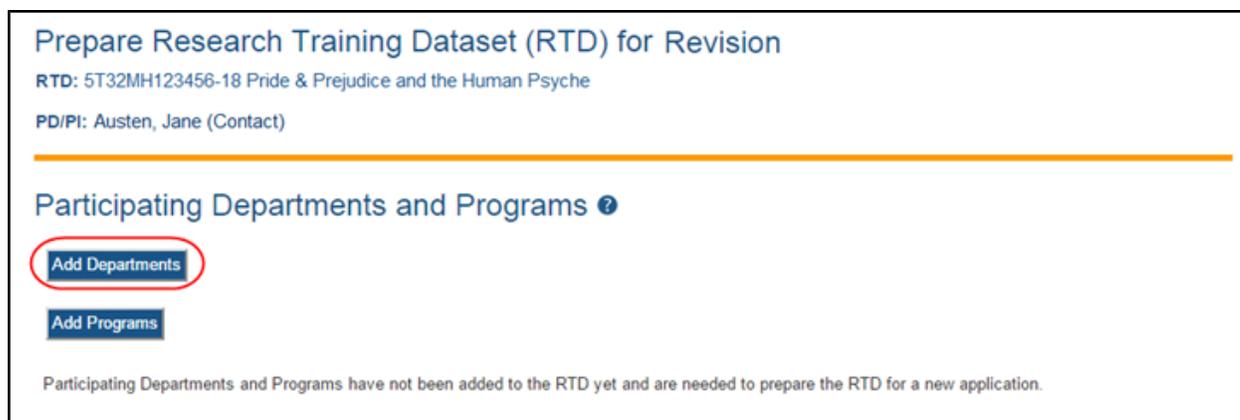


Figure 66: Adding Departments

2. Select the **Search Departments** button to search for departments in the Institution. You can narrow down the results by first entering the **Department Name**.

Tip: You may use the percent sign (%) as a wildcard at the start, at the end, or in the middle of your criteria.

3. Find the appropriate department in the results list and select the corresponding **Add Department** link from the **Action** column. Major Components are also displayed with the Department to differentiate among departments with the same name in different units of the organization.

The **Action** column updates to show *Added* for the added department. You can repeat the step to **Add Department** for as many departments as necessary.

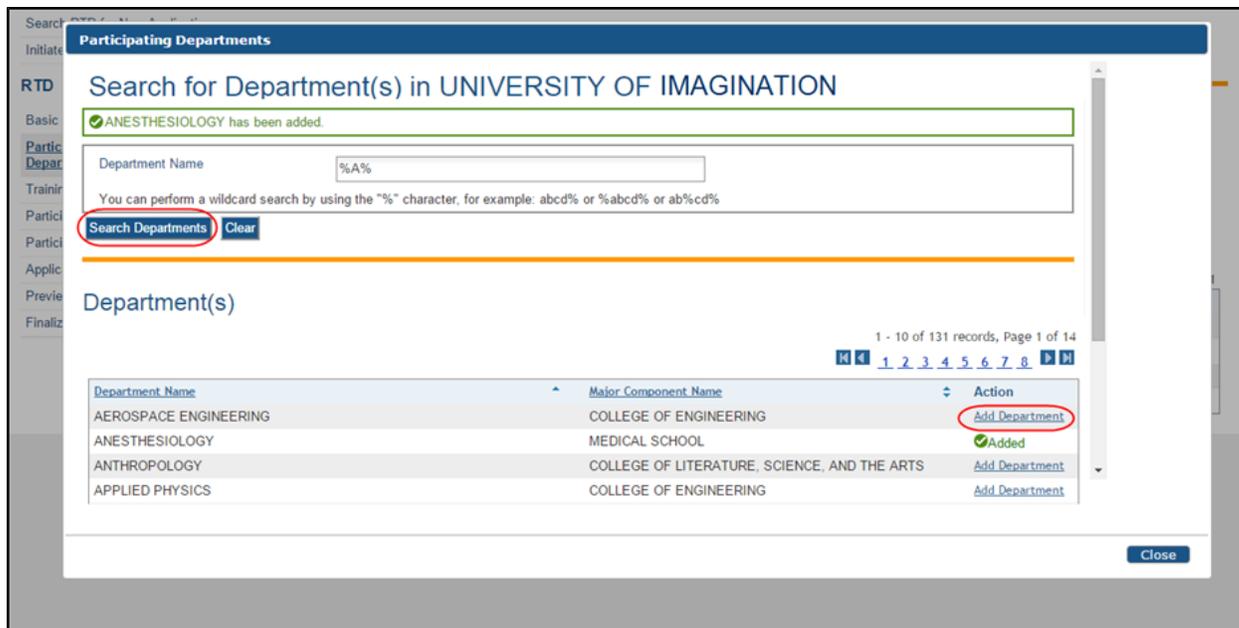


Figure 67: Searching for Departments

4. Select the **Close** button to close the screen.

The *Prepare RTD* screen updates to show the added department(s) in a table. Added programs and departments display in the same table. The **Actions** column includes links for removing and editing the programs and departments.

8.3 Add Programs

1. Select the **Add Programs** button.

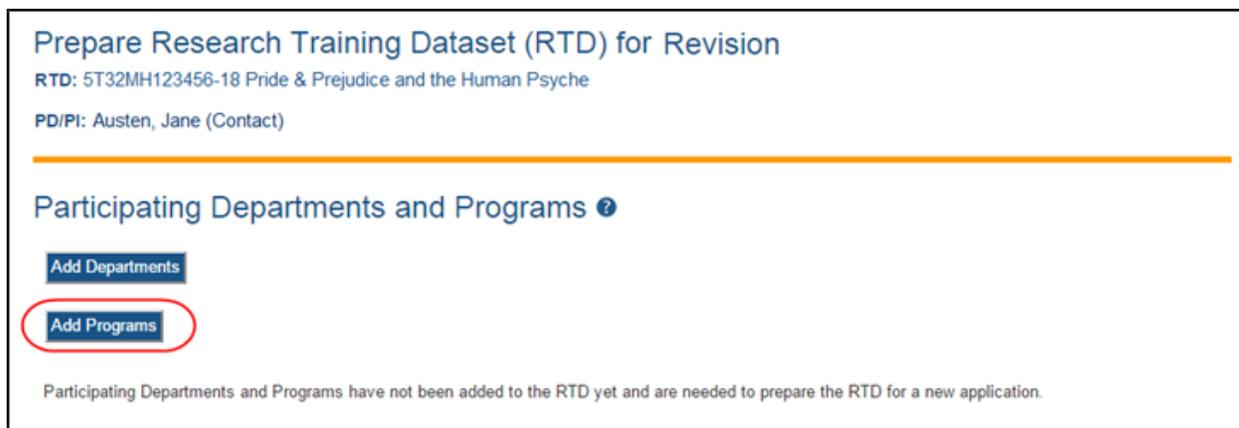


Figure 68: Add Programs Button

2. Select the **Search** button. You can narrow down the results by first entering the **Program Name** and/or **Program Description**.

Tip: You may use the percent sign (%) as a wildcard at the start, at the end, or in the middle of your criteria.

- Find the appropriate program in the results list and select the corresponding **Add Program** link from the **Action** column.

The **Action** column updates to show *Added* for the added program. You can repeat the step to **Add Program** for as many programs as necessary.

To add a Program not available in the search results, select **Create Program**. Add **Program Name** (required) and **Program Description** (optional) and select **Create Program and Add to New Application**.

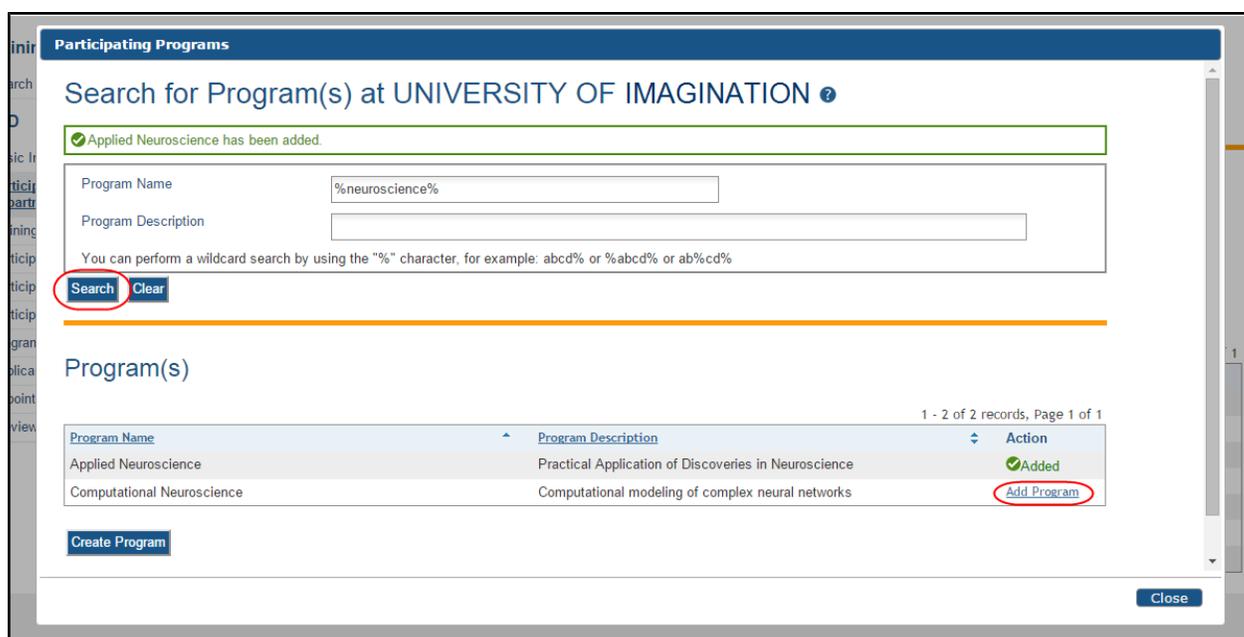


Figure 69: Searching for Programs

- Select the **Close** button to close the screen.

The *Prepare RTD* screen updates to show the added program(s) in a table. Added programs and departments display in the same table. The **Actions** column includes links for removing and editing the programs and departments.

8.4 Edit Departments & Programs

To edit a program or department, select the **Edit** link from the **Actions** column.

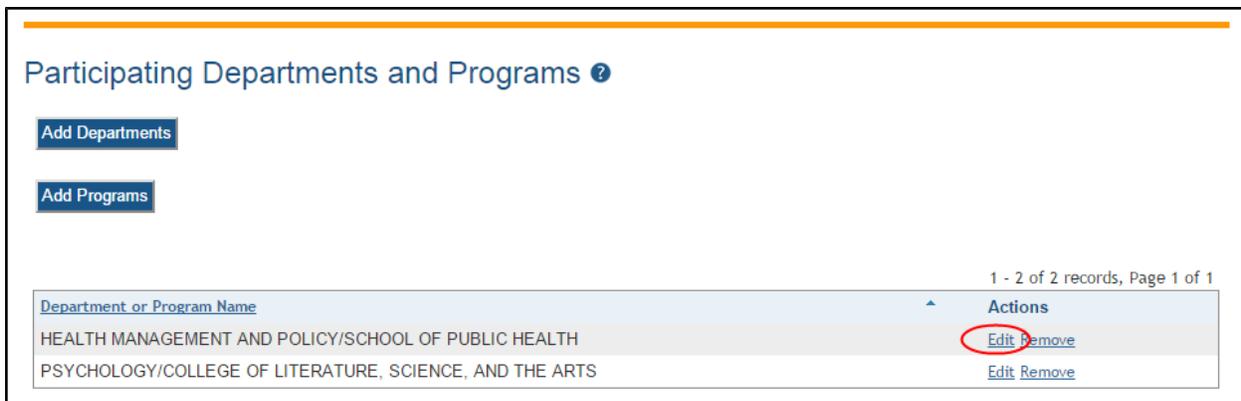


Figure 70: Edit Link for Programs and Departments

Update the Census information as necessary.

Faculty

- Total
- Participating

Predocorates

- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

Postdoctorates

- Total
- Supported by any HHS Training Award
- Postdocs with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

Prepare Research Training Dataset (RTD) for Revision

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche

PD/PI: Austen, Jane (Contact)

Participating Department/Program Detail ?

HEALTH MANAGEMENT AND POLICY/SCHOOL OF PUBLIC HEALTH

Census

Faculty

Total	<input type="text" value="0"/>
Participating	<input type="text" value="0"/>

Predocotorates

Total	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Students with Participating Faculty	<input type="text" value="0"/>
Eligible Students with Participating Faculty	<input type="text" value="0"/>

Postdoctorates

Total	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Postdocs with Participating Faculty	<input type="text" value="0"/>
Eligible Postdocs with Participating Faculty	<input type="text" value="0"/>

Figure 71: Participating Department/Program Detail

Select the **Save and Close** button to save the information.

8.4.1 Participating Department/Program Detail (Revision)

8.5 Edit Departments & Programs

To edit a program or department, select the **Edit** link from the **Actions** column.



Figure 72: Edit Link for Programs and Departments

Update the Census information as necessary.

Faculty

- Total
- Participating

Predocorates

- Total
- Supported by any HHS Training Award
- Students with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

Postdoctorates

- Total
- Supported by any HHS Training Award
- Postdocs with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

Prepare Research Training Dataset (RTD) for Revision
RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche
PD/PI: Austen, Jane (Contact)

Participating Department/Program Detail ?

HEALTH MANAGEMENT AND POLICY/SCHOOL OF PUBLIC HEALTH

Census

Faculty

Total	<input type="text" value="0"/>
Participating	<input type="text" value="0"/>

Predocotorates

Total	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Students with Participating Faculty	<input type="text" value="0"/>
Eligible Students with Participating Faculty	<input type="text" value="0"/>

Postdoctorates

Total	<input type="text" value="0"/>
Supported by any HHS Training Award	<input type="text" value="0"/>
Postdocs with Participating Faculty	<input type="text" value="0"/>
Eligible Postdocs with Participating Faculty	<input type="text" value="0"/>

Figure 73: Participating Department/Program Detail

Select the **Save and Close** button to save the information.

8.6 Training Support & Summary (Revision)

Displays the read-only totals of the following:

- Average Grant Support per Participating Faculty Member
- Total Number of Predoc Positions
- Total Number of Postdoc Positions
- Total Number of Short-Term Positions

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.

Prepare Research Training Dataset (RTD) for Revision

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche

PD/PI: Austen, Jane (Contact)

Training Support & Summary ?

Average Grant Support per Participating Faculty Member	\$0
Total Number of Predoc Positions	0
Total Number of Postdoc Positions	0
Total Number of Short-Term Positions	0

Institutional Training Support Detail

NIH Sources of Support	Grant Title, Award Number, Project Period, PD/PI
	Really Great Sample Project Title , R01NS123456-01, 02/2013 to 02/2014, Bennet, Elizabeth Remove Edit

Add Institutional Training Support

Census Totals

Faculty Edit Please provide numbers for unique faculty members across the participating departments and interdepartmental programs.

Total	0
Participating	0

Predoc

Total	0
Supported by any HHS Training Award	0
Total Predoctorates with Participating Faculty	0
Eligible Students with Participating Faculty	0
TGE Predocs Supported by this Training Grant	0
Predocs Supported by this Training Grant (R90 Only)	0

Postdoc

Total	0
Supported by any HHS Training Award	0
Total Postdoctorates with Participating Faculty	0
Eligible Postdocs with Participating Faculty	0
TGE Postdocs Supported by this Training Grant	0
Postdocs Supported by this Training Grant (R90 Only)	0

Figure 74: Training Support & Summary

8.7 Institutional Training Support

To add additional support:

1. Select the **Add Institutional Training Support** button.

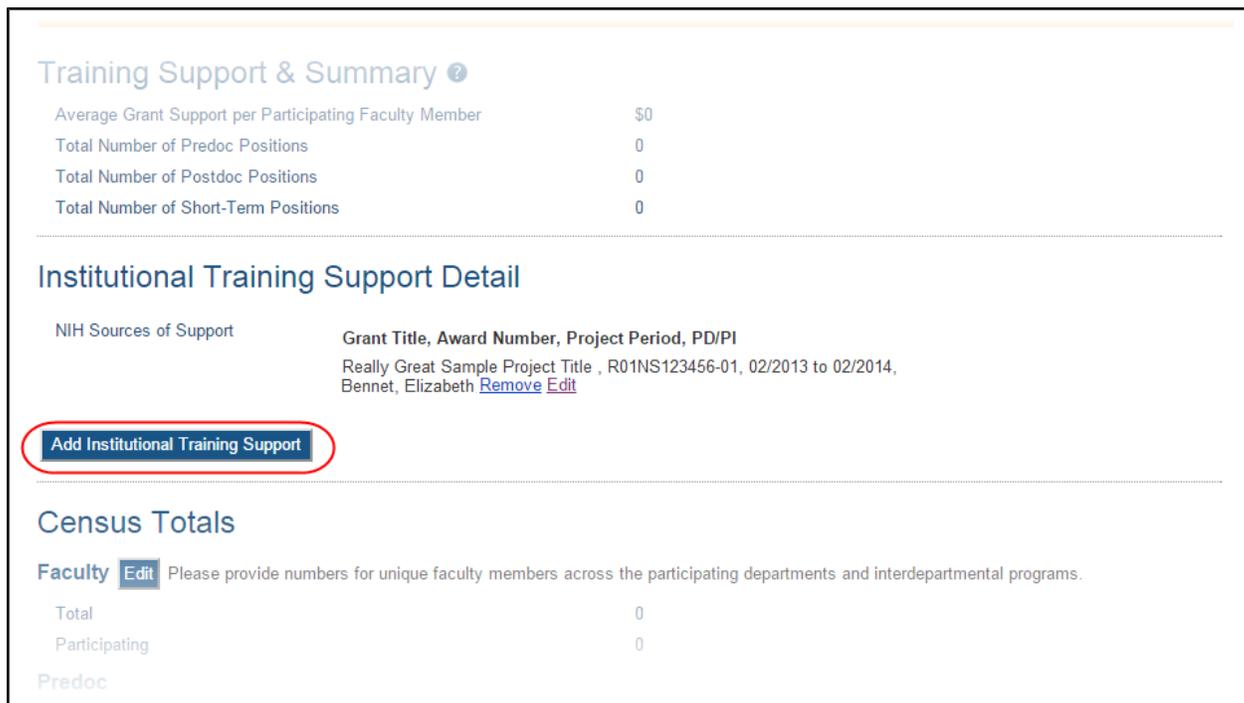


Figure 75: Add Institutional Training Support Button

2. Search for support by entering any of the criteria on the *Add Institutional Training Support* pop-up. You must enter either an IC Code or PD/PI Last Name.
 - Search Type
 - Activity Code
 - IC Code
 - Serial Number
 - Suffix Code
 - Start Date
 - End Date
 - PD/PI Last Name
 - Institution

Use the look up tool to search for and select an institution in the accompanying *Search for Institution(s)* pop up.

3. Select the **Search Funding Sources** button.

- From the result list, click the **Select** link from the **Action** column for the correct project.

The screenshot shows a web form titled "Add Institutional Training Support". It contains several input fields for search criteria: Search Type (NIH), Activity Code, IC Code, Serial Number, Suffix Code, Start Date (mm/dd/yyyy), and End Date (mm/dd/yyyy). Below these is a text field for "PD/PI Last Name" containing "%Bennet%". There is also a search icon and a text box for "Institution". A note states: "You can perform a wildcard search by using the \"%\" character, for example: abcd% or %abcd% or ab%cd%". Two buttons are present: "Search Funding Sources" (circled in red) and "Clear". Below the form is a table with one row of results. The table has columns: Grant Number, PD/PI, Project Title, Institution, Project Start Date, Project End Date, and Action. The "Action" column contains a "Select" link (circled in red). A "Close" button is at the bottom right.

Grant Number	PD/PI	Project Title	Institution	Project Start Date	Project End Date	Action
K05CA123456	Bennett, Elizabeth	Sample Project Title	Pemberley College of Fictitious Research	2014-01-09	2018-12-31	Select

Figure 76: Searching for Funding Sources

The added source of support will display on the Prepare RTD screen.

Use the **Edit** and **Remove** links next to the record to update or remove the funding source as necessary.

8.8 Census Totals

Displays totals for Faculty, Predoctorates, and Postdoctorates.

Faculty

- Total
- Participating

Use the **Edit** button to add to or update the numbers for unique faculty members across participating departments and interdepartmental programs.

Predoc

The following read-only information is displayed. This data is maintained on the **Participating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Predoctorates with Participating Faculty
- Eligible Students with Participating Faculty
- TGE Predocs Supported by this Training Grant
- Predocs Supported by this Training Grant (R90 Only)

Postdoc

The following read-only information is displayed. This data is maintained on the **Participating Departments/Programs** section, and the sum totals across **Participating Programs and Departments** are shown here.

- Total
- Supported by any HHS Training Award
- Total Postdoctorates with Participating Faculty
- Eligible Postdocs with Participating Faculty
- TGE Postdocs Supported by this Training Grant
- Postdocs Supported by this Training Grant (R90 Only)

8.8.1 Institutional Training Support Detail (Revision)

Select the **Edit** link on the **Institutional Training Support** section of the *Training Support & Summary* to open the *Institutional Training Support Detail* screen.

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 Revision

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche
PI/PI: Austen, Jane (Contact)

Institutional Training Support Detail

Project Title: Really Great Sample Project Title
Grant Number: R01NS123456-01

Number of Trainee Positions [Edit](#)

Number of Predoc Positions	0
Number of Postdoc Positions	0
Number of Short-Term Positions	0
Number of Participating Faculty	

Overlapping Faculty

[Add Overlapping Faculty](#)

Number of Overlapping Faculty 1

Overlapping Faculty Name	Actions
Darcy, Fitzwilliam	Remove

One item found.

Figure 77: Institutional Training Support Detail

8.9 Number of Trainee Positions

Use this section to add the number of Predoc, Postdoc, Short-term, and Participating Faculty positions.

1. Select the **Edit** button.
2. In the *Institution Training Support* pop up, enter the appropriate totals.
3. Select the **Save Institution Training Grant** button.

8.10 Overlapping Faculty

Use this section to update the number of overlapping faculty.

1. Select the **Add Overlapping Faculty** button.

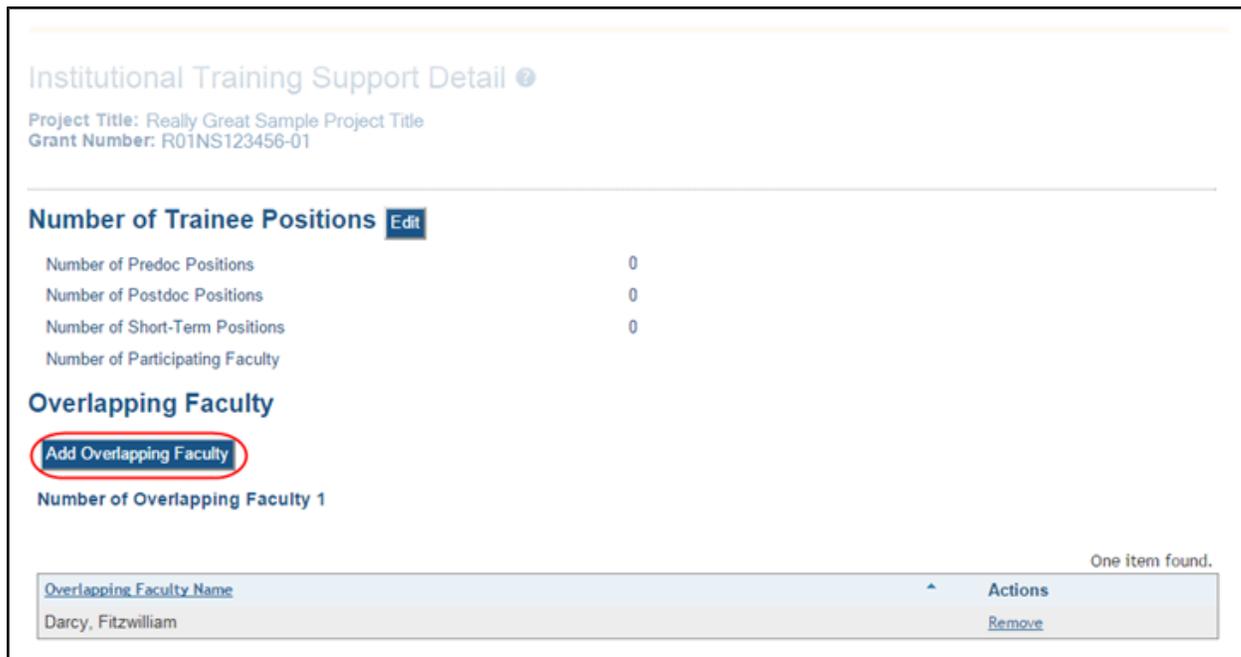


Figure 78: Add Overlapping Faculty Button

2. Search for faculty as necessary in the *Participating Faculty* pop-up.
3. In the **Action** column, select **Add Overlapping Faculty** for any participating faculty members that are also on the Institution Training Grant. If a needed faculty member does not display in the results, then add the faculty member as Participating Faculty as described in the topic titled [Participating Faculty Members \(Revision\) on Page 124](#) for revision applications.

The **Action** column updates with the word *Added*.

Participating Faculty				
Participating Faculty				
Show <input type="text" value="10"/> entries	Search: <input type="text"/>			
Person Name	Commons User ID	Person ID	Email	Action
Bingley, Charles	DARCYPAL	9123456	bingley@email.com	✓ Added
DeBurgh, Catherine	DARCYAUNT	1234567	deburgh@email.com	Add Overlapping Faculty

Showing 1 to 2 of 2 entries

Previous Next

Figure 79: Adding Participating Faculty

4. Select the **Close** button.

The Overlapping Faculty Name displays on the *Institutional Training Support Detail* screen with the option to **Remove** the overlapping faculty member. The updated total count of the overlapping faculty is calculated by system and is displayed as read-only.

8.11 Participating Faculty Members (Revision)

Displays the participating faculty added to the RTD - or a message indicating that no faculty have been added, when appropriate.

8.11.1 Add Faculty

To add faculty, select the **Add Faculty** button.

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution**.

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

2. Select the **Search Person** button.
3. All matching records display in the **Person(s)** table. Select the **Add Faculty** link to add the person to the RTD.

The top of the screen will indicate that *<Last Name>, <First Name> has been added*. The **Action** column will display the word *Added*.

Search Faculty
✕

Search for Person(s)

* Either Commons User ID or Person ID or Last Name is required to perform person search.

* Commons User ID

* Person ID

First Name

Middle Name

* Last Name

Search for persons who have a Commons affiliation with my institution

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

Search Persons
Clear

Person(s)

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
McCulloch, Ian	EATBSINGER	7123456	UNIVERSITY OF IMAGINATION	eatb@email.com	✔ Added Add Faculty
McCulloch, Mac	ISMMAC	6543217	UNIVERSITY OF IMAGINATION	ismmac@3mail.com	

Showing 1 to 2 of 2 entries Previous 1 Next

Close

Figure 80: Search for Person

4. Search for and add other faculty as necessary, repeating the steps above.
5. Use the **Close** button to close the search screen when finished.

8.11.2 Edit Faculty

Use the **Edit** link in the **Actions** column to edit the participating faculty detail for the selected member. Refer to the topic titled *Participating Faculty Detail (Revision)* on Page 125.

8.11.3 Remove

Select the **Remove** link in the **Actions** column to remove the faculty member from the RTD. At the confirmation, select **Yes**.

8.11.4 Participating Faculty Detail (Revision)

Use the **View** links to display individual sections of the *Participating Faculty Detail*. The **Open All Sections** link reveals all collapsed sections at once.

Prepare Research Training Dataset (RTD) for Revision
RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche
PD/PI: Austen, Jane (Contact)

Participating Faculty Detail [?](#)

Bingley, Charles

[\[+ Open All Sections \]](#)

[+ VIEW](#)

FACULTY MEMBER DATA

Commons User ID:	DARCYPAL
Email:	Darcy@email.com
Rank:	
Training Role(s):	

[Edit](#)

FACULTY DEGREE [+ VIEW](#)

RESEARCH SUPPORT [+ VIEW](#)

MENTORING RECORD [+ VIEW](#)

Figure 81: Participating Faculty Details

Each section provides a means for editing the information. Refer to the steps below.

8.12 Faculty Member Data

Use the **View** link in the **Faculty Member Data** panel of the *Participating Faculty Detail* to display faculty data as described below.

- **Commons User ID** (read only)
- **Person ID** (read only)
- **Email** (read only)
- **Rank**
- **Primary Department or Program**
- **Research Interest**
- **Training Role(s)**

Use the **Edit** button to open the fields in a pop-up for editing. Select **Save Member Data** to save your changes.

8.13 Faculty Degree

From this panel, you may add a degree, edit a degree, or select a degree to add to an RTD.

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

8.13.1 Add a Degree

1. Select the **Add Another Degree** button.
2. Update the fields in the *Faculty Degree* pop-up:
 - **Degree**: Select from the list
 - **Other Degree Text**: Enter if the Degree selected is *OTH* (*other type of degree*).
 - **Degree Date**: Enter in MM/YYYY format
 - **Terminal Degree**: Select the **Yes** or **No** radio button as appropriate. When the **Yes** button is selected, the terminal degree indicator (*This is the terminal degree of this person.*) displays next to the degree details in the view. Only one degree for a person can be set as the Terminal Degree.
 - **Degree Status**: Completed is the only selection available for Faculty degrees.
 - **Degree Institution**: Enter the institution name, one institution per degree. You can search for an institution by selecting the magnifying glass search icon.
3. Select the **Save** button to save your changes.
4. Repeat for any additional degrees.
5. Select the **Close** button when finished.

8.13.2 Edit a Degree

1. Use the **Edit** button next to a listed degree to display the *Faculty Degree* pop-up for editing.
2. Updates the fields as necessary.
3. Select the **Save** button followed by the **Close** button.

8.13.3 Include in RTD

1. Locate the degree you are including in the RTD.
2. Check the **Include in RTD** box for the degree to be displayed in the **Participating Faculty Members Training Table** on the RTD PDF. Up to three degrees can be selected to include in the RTD.

Uncheck the box to exclude the degree.

8.13.4 Delete a Degree

Select the **Delete** link to delete the degree from the participating faculty detail. Delete degree is not available if the **Source** of the degree is *Commons Profile*, meaning the degree is from the Commons Personal Profile of the person.

8.14 Research Support

8.14.1 NIH Sources of Support

Includes the NIH Grant number, Project Title, Period of Support. This information is displayed as read-only.

8.14.2 Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date. xTRACT displays as read-only current NIH support held by the faculty member.

To add additional support:

1. Select the **Add Another Support** button to display fields for searching/editing to add a non-NIH funding source.
2. Search for a funding source:
 - a. Select the magnifying glass icon next to the **Funding Source** field.
 - b. Search for support entering the parameters given and selecting **Search Funding Sources** button.
 - c. From the result list, click the **Select** link from the **Action** column for the correct project.
3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
4. Select an option from the **Role during funding** drop-down.
5. Select **Save**.
6. Repeat the search to add more.
7. Select **Close** when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

8.15 Mentoring Record

Use the **View** link in the **Mentoring Record** panel of the *Participating Faculty Detail* to display in number of mentors.

- Predocs In Training
- Predocs Graduated

- Predocs Continued in Research or Related Careers
- Postdocs in Training
- Postdocs Completed Training
- Postdocs Continued in Research or Related Careers

Use the **Edit** button to open the fields in a pop-up for editing. Save your changes by selecting the **Save Mentoring Records** button on the pop-up.

8.16 Students (Revision)

This section displays the students added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove students.

Prepare Research Training Dataset (RTD) for Revision

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche

PD/PI: Austen, Jane (Contact)

Students ?

[Add Student](#)

One item found.

Student Name	Commons User ID	Person ID	Student Type	Actions
Lucas, Charlotte	EBFRIEND	9876543	Pre-doc	Edit Remove

Figure 82: Students

Students(s) are listed in a table at the bottom of the screen along with the following information:

- **Student Name**
- **Commons User ID** (if available)
- **Person ID**
- **Student Type**: Pre-doc or Post-doc
- **Actions**
 - The **Edit** link opens the *Student Detail* for the selected trainee. Refer to the topic titled [Student Detail \(Revision\) on Page 131](#).
 - The **Remove** link removes the person from the RTD.

The **Add Student** feature allows you to search for and add students or create new xTRACT persons to add to the RTD.

8.17 Add Student

To add a student:

1. Select the **Add Student** button.
2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

NOTE: You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

3. All matching records display in the **Person(s)** table. Select the **Add Student** link in the **Action** to add the person.

NOTE: After you perform a search, the **Create xTRACT Person** button is enabled. Use this button to create an xTRACT person record. Refer to the topic titled [Create xTRACT Person on Page 165](#)

4. Select the **Student Type** from the pop-up box and click **OK**.
5. Repeat for any to add other students. Added students appear in the **Person(s)** list with the word *Added* shown in the **Action** column.
6. Use the **Close** button to close the search screen.

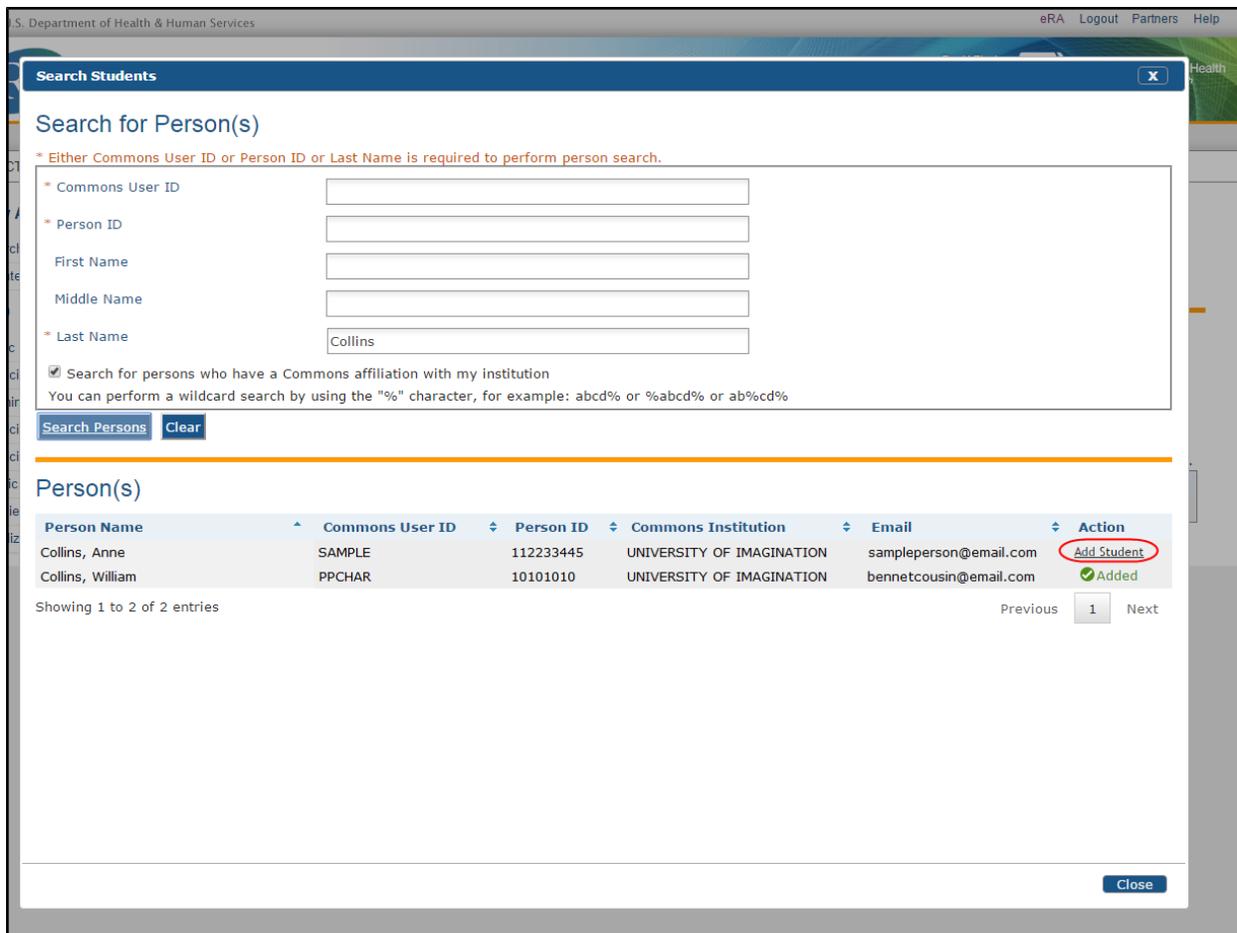


Figure 83: Search for Students

8.18 Edit Student

From the list of students, select the **Edit** link in the **Actions** column to edit the student detail.

Refer to the topic titled [Student Detail \(Revision\) on Page 131](#).

8.19 Remove

Select the **Remove** link in the **Actions** column to remove the student from the RTD. At the confirmation, select **Yes**.

8.19.1 Student Detail (Revision)

Use the **View** links to display individual sections of the *Student Detail*. The **Open All Sections** link reveals all collapsed sections at once.

Prepare Research Training Dataset (RTD) for Revision

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche

PD/PI: Austen, Jane (Contact)

Student Detail ⓘ

LUCAS, CHARLOTTE (Pre-Doc)

[+ Open All Sections]

STUDENT DATA

Commons User ID:	EBFRIEND
Email:	clucas@email.com

IN TRAINING DATA +
VIEW

FACULTY MEMBERS +
VIEW

DEGREES +
VIEW

POST-TRAINING POSITIONS +
VIEW

SUBSEQUENT GRANTS +
VIEW

PUBLICATIONS +
VIEW

Figure 84: Student Detail (Revision)

Each section provides a means for viewing or editing the information. Refer to the steps below.

8.20 Student Data

Use the **View** link in the **Student Data** panel of the *Student Detail* to display the following read-only information:

- Commons User ID or Person ID
- Email

8.21 In Training Data

Use the **View** link in the **In Training Data** panel of the *Student Detail* to display in training data as described below. Use the **Edit** button to open the fields in a pop-up for editing.

- In Training
- Type
- Research Topic
- Start Date
 - Into Current Degree-Granting Program, for a Predoctoral trainee
 - Into Postdoctoral Research, for Postdoctoral trainee
- End Date (when Trainee Left Program)

8.22 Faculty Members

Displays the faculty member for the student on the RTD.

To add faculty, select the **Add Faculty** button.

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution**.

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

2. Select the **Search Person** button.
3. All matching records display in the **Person(s)** table. Select the **Add Faculty** link to add the person to the RTD.

The top of the screen will indicate that *<Last Name>, <First Name> has been added*. The **Action** column will display the word *Added*.

Search Faculty

Search for Person(s)

* Either Commons User ID or Person ID or Last Name is required to perform person search.

* Commons User ID

* Person ID

First Name

Middle Name

* Last Name

Search for persons who have a Commons affiliation with my institution
 You can perform a wildcard search by using the "%" character, for example: abcd% or %abcd% or ab%cd%

[Search Persons](#) [Clear](#)

Person(s)

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
McCulloch, Ian	EATBSINGER	7123456	UNIVERSITY OF IMAGINATION	eatb@email.com	Added
McCulloch, Mac	ISMMAC	6543217	UNIVERSITY OF IMAGINATION	ismmac@3mail.com	Add Faculty

Showing 1 to 2 of 2 entries

Previous **1** Next

[Close](#)

Figure 85: Search for Person

4. Search for and add other faculty as necessary, repeating the steps above.
5. Use the **Close** button to close the search screen when finished.

To remove a faculty member from the RTD, select the **Delete** link from the **Action** column.

8.23 Degrees

xTRACT displays a list of completed degrees and associated data in reverse chronological order, with incomplete degrees following.

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

To add a degree:

1. Select the **Add Degree** button.
2. Update the fields in the *Create a New Degree* pop-up:

- **Degree:** Select from the list
 - **Other Degree Text:** Enter if Degree selected is *OTH* (*other type of degree*).
 - **Degree Date:** Enter in MM/YYYY format
 - **Terminal Degree:** Select the **Yes** or **No** . When **Yes** is selected, the terminal degree indicator (*This is the terminal degree of this person.*) displays next to the degree details in the view. Only one degree per person can be set as the Terminal Degree.
 - **Degree Status:** Select Completed or In Progress, as appropriate
 - **Received in Training:** Select Yes or No. Up to three degrees can be selected as Received in Training.
 - **Degree Institution:** Enter the institution name, one institution per degree. You can search for an institution by selecting the magnifying glass search icon.
3. Select the **Save** button to save your changes.
 4. Repeat for any additional degrees.
 5. Select the **Close** button when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the degrees as necessary. Degrees with *Commons Profile* as a **Source** cannot be deleted.

8.24 Post-Training Positions

Displays post-training positions employment information. The **Source** of positions is displayed as read-only as *xTRACT* (meaning the position was added or updated for the person in xTRACT) or as *Commons Profile* (meaning the position is from the Commons Personal Profile of the person).

To add employment:

1. Select the **Add Employment** button.
2. Provide the following information:
 - **Faculty Teaching Position:** Select from the list
 - Professor; Associate Professor; Assistant Professor; Instructor; Other
 - **Academic Administrative Position:** Select from the list
 - President; Vice President; Dean; Assistant or Associate Dean; Chairperson of Department (or Director); Other
 - **Primary Employment Indicator:** Select the **Yes**, **No**, appropriate.
 - **Full Time Employment Indicator:** Select **Full-Time** or **Part Time**
 - **Current/Initial Employment Indicator:** Select **Primary Current** or **Primary Initial**

- **Primary Activity:** Select from list
 - Research-intensive; Research-related; Further training; Other
 - **Employment Position:** Enter the position title for the employment. This is required.
 - **Institution:** Enter the institution or select the icon to open a search box
 - **Primary Department of Position:** Enter the department or select the icon to open a search box
 - **Start Date:** Select a date in MM/YYYY format. This is required.
 - **End Date:** Select a date MM/YYYY format.
3. Select the **Save** button to save your changes.
 4. Repeat to add another.
 5. Select **Close** to close the window.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the positions as necessary. Positions with a **Source** of *Commons Profile* cannot be deleted.

8.25 Subsequent Grants

NIH Sources of Support

Includes the NIH Grant number, Project Title, Period of Support.

To add additional NIH support:

1. Select the **Add NIH Source of Support** button to open the *Edit/Add Sources of Support* pop-up.
2. Select the search icon next to **Funding Source** to open query fields.
 - a. Enter search criteria in the fields.
 - b. Select the **Search Funding Sources** button.
 - c. From the list, select the funding source by clicking the appropriate **Select** link in the **Action** column.
3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
4. Select **Save**.
5. Repeat the search to add more.

Use the **Edit** and **Delete** links to update or remove the funding source as necessary.

Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start

Date.

To add additional support:

1. Select the **Add Other Source of Support** button to open the *Edit/Add Sources of Support* pop-up.

Search for support or create new funding source:

To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- b. From the result list, click the **Select Funding Source** link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
 - b. Update the fields. Required fields show a red asterisk (*).
 - c. Select **Save**.
2. Select an option from the **Role during funding** drop-down.
 3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
 4. Select **Save**.
 5. Repeat the search to add more.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

8.26 Publications

To add a publication:

1. Select the **Add Publication** button.
2. From the *Edit/Add Publication* pop-up, enter the required information:
 - Publication (Authors, Year, Title, Journal, Volume, Inclusive Pages)
 - Faculty Member

To search for a faculty member, click the magnifying glass icon to open *Search for Person (s)* pop-up.

- a. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons**

who have a Commons affiliation with my institution.

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

- b. All matching records display in the **Person(s)** table. Click the **Select Faculty** link to add the person. This will populate the name into the *Edit/Add Publication* pop-up, which will display on your screen once again.
3. Select the **Save** button to save the information. You will see a confirmation at the top of the pop-up.
4. Select the **Close** button to return to the *Student Detail* screen.

To indicate no publications, mark the checkbox titled **Check this box if there are no publications for this trainee.**

If there are no publications checked:

1. Select a reason for **No Publications** from the drop-down list.
2. Search for and select a faculty member.
3. Select the **Save** button to save the information.

Use the **Edit** and **Delete** buttons next to a specific publication to update or remove that record.

8.27 Participating Trainees (Revision)

Displays the participating trainees added to the RTD - or a message indicating that none has been added, when appropriate. From this screen, you can add, edit, and remove participating trainees.

Prepare Research Training Dataset (RTD) for Revision

RTD: 5T32MH123456-18 *Pride & Prejudice and the Human Psyche*

PD/PI: Austen, Jane (Contact)

RTD Reporting Period: 09/01/1998 - 07/31/2015

Participating Trainees ⓘ

[Add Trainee](#)

1 - 50 of 53 records, Page 1 of 2
⏪ ⏩ [1](#) [2](#) ⏴ ⏵

Person Name	Commons User ID	Person ID	Trainee Type	Start Date	End Date	Actions
Collins, William	PPCHAR	9123456	Post-doc	2014/10		Edit Remove
Lucas, Charlotte	BENNETPAL	12345678	Post-doc			Edit Remove

Figure 86: Participating Trainees

Participating trainee(s) are listed in a table at the bottom of the screen along with the following information:

- **Person Name**
- **Commons User ID** (if available)
- **Person ID**
- **Trainee Type:** Pre-doc; Post-doc; Short Term
- **Start Date**
- **End Date**
- **Actions**
 - The **Edit** link opens the *Participating Trainee Detail* for the selected trainee. Refer to the topic titled [Participating Trainee Detail \(Revision\) on Page 140](#).
 - The **Remove** link removes the person from the RTD.

The **Add Trainee** feature allows you to search for and add existing trainees or create new xTRACT persons to add to the RTD.

8.28 Add Trainee

To add a trainee:

1. Select the **Add Trainee** button.
2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

NOTE: You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

3. All matching records display in the **Person(s)** table. Select the **Add Trainee** link in the **Action** to add the person.

NOTE: After you perform a search, the **Create xTRACT Person** button is enabled. Use this button to create an xTRACT Person record. Refer to the topic titled [Create xTRACT Person on Page 165](#)

4. Select the **Trainee Type** from the pop-up box: Pre Doctoral, Post Doctoral, or Short Term and click **OK**.
5. Repeat for any to add other students. Added students appear in the **Person(s)** list with the

word *Added* shown in the **Action** column.

6. Use the **Close** button to close the search screen.

8.29 Edit Trainee

From the list of trainees, select the **Edit** link in the **Actions** column to edit the trainee detail for the selected trainee.

Refer to the topic titled [Participating Trainee Detail \(Revision\) on Page 140](#).

8.30 Remove

Select the **Remove** link in the **Actions** column to remove the trainee from the RTD. At the confirmation, select **Yes**.

8.30.1 Participating Trainee Detail (Revision)

While preparing an RTD for a Renewal, you can open the *Participating Trainee Detail* for a trainee by selecting that trainee's **Edit** link. The *Participating Trainee Data* for the selected person is grouped into panels. Use the **View** and **Edit** buttons and links to display and edit the information as detailed below.

Prepare Research Training Dataset (RTD) for Revision
 RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche
 PD/PI: Austen, Jane (Contact)

Participating Trainee Detail ⓘ
Lucas, Charlotte (Post-doc)

[\[+ Open All Sections \]](#)

TRAINEE DATA	
Commons User ID:	BENNETPAL
Email:	clucas@email.com

- IN TRAINING DATA +
VIEW
- FACULTY MEMBERS +
VIEW
- SUPPORT DURING TRAINING +
VIEW
- DEGREES +
VIEW
- POST-TRAINING POSITIONS +
VIEW
- SUBSEQUENT GRANTS +
VIEW
- PUBLICATIONS +
VIEW

Figure 87: Participating Trainee Detail (Revision)

IMPORTANT: The information displayed in the trainee detail is comprised of information pulled from the trainee's eRA Commons Personal Profile, where available. However, updates made to the xTRACT trainee detail will not update that trainees Personal Profile in Commons.

8.31 Trainee Data

Use the **View** link in the **Trainee Data** panel of the *Participating Trainee Detail* to display the following read-only information, as applicable:

- Person ID or Commons ID
- Email

8.32 *In Training Data*

Use the **View** link in the **In Training Data** panel of the *Participating Trainee Detail* to display in training data as described below. Use the **Edit** button to open the fields in a pop-up for editing.

- In Training
- Type
- Research Topic
- Start Date
 - Current Degree-Granting Program for a Predoctoral trainee
 - Postdoctoral Research for Postdoctoral trainee
- End Date (when Trainee Left Program)

NOTE: In order to finalize the RTD for an RPPR, all trainees must have a start date in the **In Training Data** section. Additionally, trainees with *No* selected for **In Training** status must have an end date.

8.33 *Faculty Members*

Displays the participating faculty added to the RTD.

To add faculty, select the **Add Faculty** button.

1. Use the parameters on the *Search for Person(s)* window to find the faculty member. To look outside your institution, uncheck the box titled **Search for persons who have a Commons affiliation with my institution**.

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

2. Select the **Search Person** button.
3. All matching records display in the **Person(s)** table. Select the **Add Faculty** link to add the person to the RTD.

The top of the screen will indicate that *<Last Name>, <First Name> has been added*. The **Action** column will display the word *Added*.

Search Faculty [X]

Search for Person(s)

* Either Commons User ID or Person ID or Last Name is required to perform person search.

* Commons User ID:

* Person ID:

First Name:

Middle Name:

* Last Name:

Search for persons who have a Commons affiliation with my institution
 You can perform a wildcard search by using the "%" character, for example: abcd% or %abcd% or ab%cd%

[Search Persons](#) [Clear](#)

Person(s)

Person Name	Commons User ID	Person ID	Commons Institution	Email	Action
McCulloch, Ian	EATBSINGER	7123456	UNIVERSITY OF IMAGINATION	eatb@email.com	Added
McCulloch, Mac	ISMMAC	6543217	UNIVERSITY OF IMAGINATION	ismmac@3mail.com	Add Faculty

Showing 1 to 2 of 2 entries Previous **1** Next

[Close](#)

Figure 88: Search for Person

4. Search for and add other faculty as necessary, repeating the steps above.
5. Use the **Close** button to close the search screen when finished.

To remove a faculty member from the RTD, select the **Delete** link in the **Action** column.

8.34 Support During Training

NOTE: This section applies to pre-doc and and post-doc trainees only.

Sources of support, both within and outside of NIH, can be maintained in this section. Click on the collapsed panel to display the information.

After a start date has been added for the trainee in *In Training Data*, the **Training Years (TYs)** will be displayed as read-only with corresponding abbreviations for funding sources in **Support During Training**.

This NIH Training Grant

Includes the NIH Grant number , Project Title, Period of Support.

Click the **Add This NIH Source of Support** to add support from **This NIH Training Grant**. Enter the **Start of Funding** and **End of Funding**. To remove support from **This NIH Training Grant**, select **Delete All from This NIH Funding Source of Support**.

NIH Sources of Support

Includes the NIH Grant number, Project Title, Period of Support.

To add additional NIH support:

1. Select the search icon next to **Funding Source** to open query fields.
 - a. Enter search criteria in the fields.
 - b. Select the **Search Funding Sources** button.
 - c. From the list, select the funding source by clicking the appropriate **Select** link in the **Action** column.
2. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
3. Enter the **Other role description** if *Other* was selected for **Role during funding**.
4. Select **Save**.
5. Repeat the search to add more.

Use the **Edit** and **Delete** links to update or remove the funding source as necessary.

Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date.

To add additional support:

1. Select the **Add Other Source of Support** button to open the *Edit/Add Sources of Support* pop-up.

Search for support or create new funding source:

To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- b. From the result list, click the link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
 - b. Update the fields. Required fields show a red asterisk (*).
 - c. Select **Save**.
2. Select an option from the **Role during funding** drop-down.
 3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
 4. Enter the **Other role description** if *Other* was selected for **Role during funding**.
 5. Select **Save**.
 6. Repeat the search to add more.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

8.35 Degrees

xTRACT displays a list of completed degrees and associated data in reverse chronological order, with incomplete degrees following.

To add a degree:

1. Select the **Add Degree** button.
2. Update the fields in the *Create a New Degree* pop-up:
 - **Degree**: Select from the list
 - **Other Degree Text**: Enter the name of the degree if an *OTH* type of degree was selected.
 - **Degree Date**: Enter in MM/YYYYY format
 - **Terminal Degree**: Select the **Yes** or **No** as appropriate. When **Yes** is selected, the terminal degree indicator (*This is your terminal degree.*) displays next to the degree details in the view. A person can only have one terminal degree.
 - **Degree Status**: Select Completed or In Progress, as appropriate
 - **Received in Training**: Select Yes or No. Up to three degrees can be set as Received in Training.
 - **Degree Institution**: Enter the institution name, one institution per degree. You can search for an institution by selecting the magnifying glass search icon.
3. Select the **Save** button to save your changes.
4. Repeat for any additional degrees.
5. Select the **Close** button when finished.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the degree(s) as necessary. Degrees *Commons Profile* as the **Source** cannot be deleted.

8.36 **Post-Training Positions**

Displays post-training positions employment information.

To add employment:

1. Select the **Add Employment** button.
2. Provide the following information:
 - **Faculty Teaching Position:** Select from the list:
 - Professor; Associate Professor; Assistant Professor; Instructor; Other
 - **Academic Administrative Position:** Select from the list:
 - President; Vice President; Dean; Assistant or Associate Dean; Chairperson of Department (or Director); Other
 - **Primary Employment Indicator:** Select the **Yes** or **No**.
 - **Full Time Employment Indicator:** Select **Full-Time** or **Part-Time**
 - **Current/Initial Employment Indicator:** Select **Primary Current** or **Primary Initial**
 - **Primary Activity:** Select from list
 - Research-intensive; Research-related; Further training; Other
 - **Employment Position**
 - **Institution:** Enter the institution or select the icon to open a search box
 - **Primary Department of Position:** Enter the department or select the icon to open a search box
 - **Start Date:** Select a date in MM/YYYY format.
 - **End Date:** Select a date MM/YYYY format.
3. Select the **Save** button to save your changes.
4. Repeat to add another.
5. Select **Close** to close the window.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the position(s) as necessary. Positions with *Commons Profile* as the **Source** cannot be deleted.

8.37 **Subsequent Grants**

NIH Sources of Support

Includes the NIH Grant number, Project Title, Period of Support.

To add additional NIH support:

1. Select the search icon next to **Funding Source** to open query fields.
 - a. Enter search criteria in the fields.
 - b. Select the **Search Funding Sources** button.
 - c. From the list, select the funding source by clicking the appropriate **Select** link in the **Action** column.
2. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
3. Select **Save**.
4. Repeat the search to add more.

Use the **Edit** and **Delete** links to update or remove the funding source as necessary.

Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date.

To add additional support:

1. Select the **Add Other Source of Support** button to open the *Edit/Add Sources of Support* pop-up.

Search for support or create new funding source:

To search:

- a. Search for support entering the parameters given and selecting **Search Funding Sources** button.
- b. From the result list, click the link from the **Action** column for the correct project.

To create:

- a. Select the **Create Funding Source** button.
 - b. Update the fields. Required fields show a red asterisk (*).
 - c. Select **Save**.
2. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
 3. Select **Save**.
 4. Repeat the search to add more.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

8.37.0.1 Publications

To add a publication:

1. Select the **Add Publication** button.
2. From the *Edit/Add Publication* pop-up, enter the required information:
 - Publication (Authors, Year, Title, Journal, Volume, Inclusive Pages)
 - Faculty Member

To search for a faculty member, click the magnifying glass icon to open *Search for Person(s)* pop-up.

- a. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by removing the checkmark from the box titled **Search for persons who have a Commons affiliation with my institution**.

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

- b. All matching records display in the **Person(s)** table. Click the **Select Faculty** link to add the person. This will populate the name into the *Edit/Add Publication* pop-up, which will display on your screen once again.
3. Select the **Save** button to save the information. You will see a confirmation at the top of the pop-up.
4. Select the **Close** button to return to the *Student Detail* screen.

To indicate no publications, mark the checkbox titled **Check this box if there are no publications for this trainee**.

If there are no publications checked:

1. Select a reason for **No Publications** from the drop-down list.
2. Search for and select a faculty member.
3. Select the **Save** button to save the information.

Use the **Edit** and **Delete** buttons next to a specific publication to update or remove that record.

8.38 Program Statistics (Revision)

Prepare Research Training Dataset (RTD) for Revision

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche

PI/PI: Austen, Jane (Contact)

RTD Reporting Period: 09/01/1998 - 07/31/2015

Program Statistics

Program Statistics are not applicable for this reporting period

* Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D. 0.0 %

* Average Time to Ph.D. for Trainees in the Last 10 Years (not including leaves of absence) 0.0 Year

Figure 89: Program Statistics (Revision)

The **Program Statistics** section is only available for training grants that have Predoctorate Trainees.

1. Enter the program statistics as follows:
 - Percentage of Trainees Entering Graduate School 10 Years Ago Who Completed the Ph.D.
 - Average Time to Ph.D. for Trainees in the Last 10 Years (not including leaves of absence)
2. Select the **Save Program Statistics** button.

Use the checkbox to indicate that **Program Statistics are not applicable for this reporting period**.

8.39 Applicants and Entrants (Revision)

To enter Pre-doc and Post-doc applicants and entrants, first enter the start year of the most recently completed academic year and click the **Submit** button.

Select the **Pre-Doc Applicants and Entrants** and **Post-Doc Applicants and Entrants** links to display and enter data for the specific academic year(s).

Prepare Research Training Dataset (RTD) for Revision

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche

PDI/PI: Austen, Jane (Contact)

Applicants and Entrants

Start year of the most recently completed academic year:

The Pre-doc and Post-doc data may be edited via the links below, once the Start of the most recently completed academic year has been provided.

[Pre-Doc Applicants and Entrants](#)

[Post-Doc Applicants and Entrants](#)

Figure 90: Applicants and Entrants

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).

For example, let's say the first academic year is 2000-2001 and there are applicant/entrant data entered for that year. If the first academic year is changed to 2001-2002 by changing the most recently-completed academic year from 2001 to 2002, the same applicant/entrant data display for that first year.

8.39.1 Predoctoral Applicant and Entrant Counts and Characteristics (Revision)

8.39.1.1 Edit the Counts and Characteristics

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit <X>** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save <X>** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

Prepare Research Training Dataset (RTD) for Revision

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche
 PD/PI: Austen, Jane (Contact)

[2014 - 2015](#)
[2013 - 2014](#)
[2012 - 2013](#)
[2011 - 2012](#)
[2010 - 2011](#)
[Summary](#)

Predocutorial Applicant and Entrant Counts and Characteristics ?

Counts

Department or Program	Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support
College of Imagination				
Department of Psychology				
Pharmacology				
School of Communication				
Total	0	0	0	0

[Edit Counts](#)

Characteristics

GPA

Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support
Mean GPA			
Lowest GPA			
Highest GPA			

[Edit GPA](#)

Research Experience

	New Entrants to the Program	New Entrants Eligible for Support
Mean Months of Prior, Full-Time Research Experience		
Lowest Number of Months of Prior, Full-Time Research Experience		
Highest Number of Months of Prior, Full-Time Research Experience		

[Edit Research Experience](#)

Prior Institutions

Institution	New Entrants to the Program	New Entrants Eligible for Support	Action
<input type="text" value="Search for Institution"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Add Prior Institution

Diversity

	New Entrants to the Program	New Entrants Eligible for Support
Percent with a Disability		
Percent from Underrepresented Racial & Ethnic Groups		

[Edit Diversity](#)

Figure 91: Predocutorial Applicant and Entrants Counts and Characteristics

8.40 Counts table

For Predocutorial Applicants and Entrants, Counts are entered by Participating Departments or Program. If a Department or Program is missing, refer to the topic titled [Participating Departments and Programs \(Renewal\)](#) on Page 63.

- Department or Program (read only)
- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

8.41 Characteristics

The following tables exist for Characteristics:

8.41.1 GPA

Enter the Mean GPA, Lowest GPA, and Highest GPA for the following:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

8.41.2 Research Experience

Enter the mean, lowest, and highest number of months of prior, full-time research experience for the following:

- New Entrants to the Program
- New Entrants Eligible for Support

8.41.3 Prior Institutions

Use the **Search for Institution** link to open a pop-up for searching and selecting an institution. Once the institution is selected and displayed on the table, select the **Add Prior Institution** link in the **Action** column.

Use the **Edit** and **Remove** links to modify or remove this data.

- New Entrants to the Program
- New Entrants Eligible for Support

8.41.4 Diversity

Enter the percent of entrants with a disability and the percent from under-represented racial and ethnic groups for the following:

- New Entrants to the Program
- New Entrants Eligible for Support

8.41.4.1 Summary of Counts and Characteristics

Select the **Summary** tab to display a summary for predoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.

To edit this information, refer to the above section of this topic.

8.41.5 Postdoctoral Applicant and Entrant Counts and Characteristics (Revision)

For each Academic Year, update the *Applicant and Entrant Counts and Characteristics* appropriately. Use the **Edit <X>** buttons provided at the bottom of each table to enter your data. These buttons open up the fields on each table. Enter the data and select the **Save <X>** buttons to save it. Or select **Cancel** to exit editing without saving the changes.

Prepare Research Training Dataset (RTD) for Revision

RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche
 PD/PI: Austen, Jane (Contact)

[2014 - 2015](#)
[2013 - 2014](#)
[2012 - 2013](#)
[2011 - 2012](#)
[2010 - 2011](#)
[Summary](#)

Postdoctoral Applicant and Entrant Counts and Characteristics ?

Counts

	Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support
PhDs				
MDs				
Dual-Degree Holders				
Other Degree Holders				
Total	0	0	0	0

[Edit Counts](#)

Characteristics

Publications

	Total Applicant Pool	Applicants Eligible for Support	New Entrants to the Program	New Entrants Eligible for Support
Mean Number of Publications				
Lowest Number of Publications				
Highest Number of Publications				
Mean Number of First-Author Publications				
Lowest Number of First-Author Publications				
Highest Number of First Author Publications				

[Edit Publication](#)

Prior Institutions

Institution	New Entrants to the Program	New Entrants Eligible for Support	Action
<input type="text" value="Search for Institution"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Add Prior Institution

Diversity

	New Entrants to the Program	New Entrants Eligible for Support
Percent with a Disability		
Percent from Underrepresented Racial & Ethnic Groups		

[Edit Diversity](#)

Figure 92: Postdoctoral Applicant and Entrants Counts and Characteristics

8.42 Counts table

For PhDs, MDs, dual-degree holders, and other degree holders, update the following information:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

8.43 Characteristics

The following tables exist for Characteristics:

8.43.1 Publications

Enter the mean, lowest, and highest number of publications as well as the mean, lowest, and highest number of first author publications for the following:

- Total Applicant Pool
- Applicants Eligible for Support
- New Entrants to the Program
- New Entrants Eligible for Support

8.43.2 Prior Institutions

Use the **Search for Institution** link to open a pop-up for searching and selecting an institution. Once the institution is selected and displayed on the table, select the **Add Prior Institution** link in the **Action** column.

Use the **Edit** and **Remove** links to modify or remove this data.

- New Entrants to the Program
- New Entrants Eligible for Support

8.43.3 Diversity

Enter the percent of entrants with a disability and the percent from under-represented racial and ethnic groups for the following:

- New Entrants to the Program
- New Entrants Eligible for Support

8.43.3.1 Summary of Counts and Characteristics

Select the **Summary** tab to display a summary for postdoctoral applicants and entrants. The summary displays the means across all years for the counts and characteristics.

To edit this information, refer to the above section of this topic.

8.44 Appointments (Revision)

Displays the training positions awarded and appointed, separately within two tables.

Prepare Research Training Dataset (RTD) for Revision
RTD: 5T32MH123456-18 Pride & Prejudice and the Human Psyche
PD/PI: Austen, Jane (Contact)

Appointments ?

Training Positions Awarded

					Sum of Budget Years
Predocctoral Awarded	0	0	0	0	0
Postdoctoral Awarded	0	0	0	0	0
Short-Term Awarded	0	0	0	0	0

Training Positions Appointed

	Sum of Budget Years
Predocctoral Appointed	
Predoc Dual Degree	
Predoc Diverse Backgrounds	
Postdoctoral Appointed	
Postdoc MD or Equivalent	
Postdoc PhD or Equivalent	
Postdoc DDS, DVM, Other	
Postdoc Dual Degree	
Postdoc Diverse Backgrounds	
Short-Term Appointed	
Short-Term Diverse Backgrounds	

[Edit Appointments](#)

Figure 93: Appointments

8.45 Training Positions Awarded

The **Training Positions Awarded** table shows the number of awarded Predocctoral, Postdoctoral, and Short-Term appointments for each budget year. The last column of the table shows the sum of each appointment over all budget years.

This information is read-only.

8.46 Training Positions Appointed

The **Training Positions Appointed** table shows the number of appointed training positions for each budget year. The last column of the table shows the sum of each appointment over all budget years. Training positions include:

- Predoctoral Appointed
- Predoc Dual Degree
- Predoc Diverse Backgrounds
- Postdoctoral Appointed
- Postdoc MD or Equivalent
- Postdoc PhD or Equivalent
- Postdoc DDS, DVM, Other
- Postdoc Dual Degree
- Postdoc Diverse Backgrounds
- Short-Term Appointed
- Short-Term Diverse Backgrounds

Use the **Edit Appointments** button to open the table fields for editing. After updating the fields, select the **Save Appointments** button to save the information.

8.47 Preview PDF (Revision)

Select the **Preview PDF** link to open save, and/or print the training tables. An *In Progress* watermark will be printed on the *Training Table* PDF until the RTD is finalized.

8.48 Finalize RTD (Revision)

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.

A confirmation message warns: *Once finalized the Research Training Data cannot be edited. Are you sure you want to continue?*

IMPORTANT: 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.

xTRACT generates a PDF version of the training tables without the *In Progress* watermark, updates the status of the RTD to *Final*, and locks the RTD for editing.

If data are needed to finalize the RPPR RTD, the appropriate error message(s) display as follows:

- *Missing Required Data: Start Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.*
- *Missing Required Data: End Date in the In Training Data section is required to finalize the RTD. Please enter the missing data and try again.*

All trainees must have a start date in the **In Training Data** section. Additionally, trainees with **No** selected for **In Training** status must have an end date.

9 Search for Persons

Use the *Search for Person(s)* screen to search for and access trainee information to maintain profiles or prepare research training data sets for revisions, renewals, or progress reports.

The screenshot displays the 'Search for Person(s)' interface. At the top, there are navigation tabs: 'xTRACT Info', 'New Applications', 'Training Grants', 'Persons', and 'Institution Data'. The 'Persons' tab is selected. Below the navigation, there is a 'Search Persons' section with a search form. The form includes fields for 'Commons User ID', 'Person ID', 'First Name' (containing 'Ian'), 'Middle Name', and 'Last Name' (containing 'McCu%'). A checkbox is checked, labeled 'Search for persons who have a Commons affiliation with my institution'. Below the form are 'Search Persons' and 'Clear' buttons. A red circle highlights the 'Search Persons' button, with an arrow pointing to the search results table below. The results table is titled 'Person(s)' and shows one item found. The table has columns for 'Person Name', 'Commons User ID', 'Person ID', 'Commons Institution', 'Email', and 'Action'. The row contains: 'MCCULLOCH, IAN', 'EATBLEAD', '1234567', 'UNIVERSITY OF IMAGINATION', 'eatb@email.com', and 'Edit'. Below the table is a 'Create xTRACT Person' button.

Figure 94: Search for Person(s) and Results

1. Select the **Persons** tab to access the *Search for Person(s)* screen.
2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by checking the **Search for persons who have a Commons affiliation with my institution** box.

NOTE: You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

All records matching the entered search criteria display in the **Person(s)** section of the screen. If no programs meet the entered criteria, the following message displays: *Nothing found to display*.

The matching records are presented in a table and include the following related information:

- **Person Name**
- **Commons User ID**
- **Person ID**

- **Commons Institution**
- **Email**
- **Action**

Depending on your role, you may see the **Edit** or **View** link in the **Action** column. The **Edit** link allows you to access the *xTRACT Person Profile* for editing, while the **View** link provides read-only access. For more information on maintaining a person's profile, refer to the topic titled [xTRACT Person Profile on Page 160](#).

NOTE: After searching for persons, the **Create xTRACT Person** button becomes available. Select this button to access the *Create xTRACT Person* screen. Refer to the topic titled [Create xTRACT Person on Page 165](#) more information.

9.1 xTRACT Person Profile

9.1.1 Accessing the Person Profile

1. Select the **Persons** tab to access the *Search for Person(s)* screen.
2. Enter parameters and select the **Search Persons** button. By default the search will be conducted within your institution, but you can expand this search to look outside of your institution by checking the **Search for persons who have a Commons affiliation with my institution** box.

NOTE: You must enter a **Commons ID**, **Person ID**, -or- **Last Name** to perform a search.

All records matching the entered search criteria display in the **Person(s)** section of the screen. If no programs meet the entered criteria, the following message displays: *Nothing found to display*.

The matching records are presented in a table and include the following related information:

- **Person Name**
- **Commons User ID**
- **Person ID**
- **Commons Institution**
- **Email**
- **Action**

NOTE: After searching for persons, the **Create xTRACT Person** button becomes available. Select this button to access the *Create xTRACT Person* screen. Refer to the topic titled [Create xTRACT Person on Page 165](#) more information.

3. Select the **Edit** link for the specific person profile being modified.

The *xTRACT Person Profile* screens displays for the selected person. Person Data, Sources of Support, Degrees, and Employment can all be maintained in this profile.

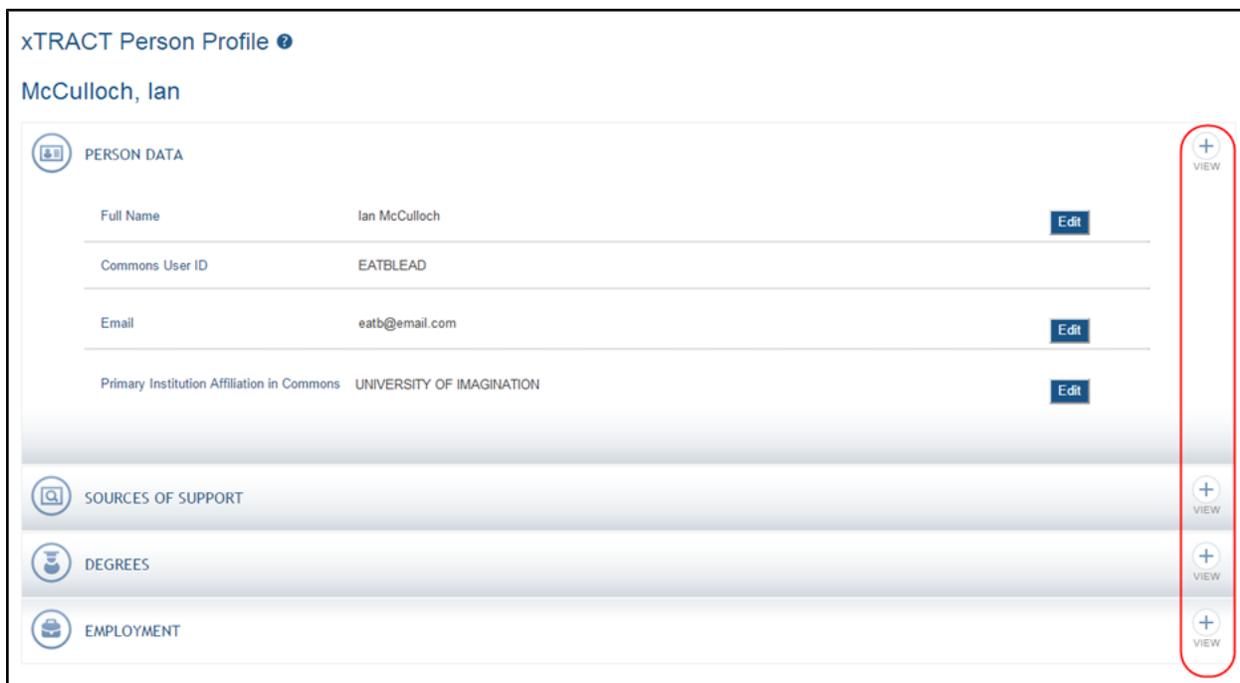


Figure 95: Sample xTRACT Person Profile

9.2 Person Data

Use the **View** link in the **Person Data** panel of the *xTRACT Person Profile* to display the following information:

- **Full Name**
- **Commons User ID**
- **Email**
- **Primary Institution Affiliation in Commons**

Use the **Edit** links to open the fields for editing. Commons User ID cannot be edited.

9.3 Sources of Support

NOTE: This section applies to pre-doc and and post-doc trainees only.

Sources of support, both within and outside of NIH, can be maintained in this section. Use the View button on the collapsed panel to display the information.

IMPORTANT: You must first select the **Edit** button to open the fields for editing.

NIH Sources of Support

Includes the NIH Grant number, Project Title, Period of Support.

To add additional NIH support:

1. Select the **Add a Funding Source** button to display fields for editing.
2. Select the search icon next to **Funding Source** to open query fields.
 - a. Enter search criteria in the fields.
 - b. Select the **Search Funding Sources** button.
 - c. From the list, select the funding source by clicking the appropriate **Select** link in the **Action** column.
3. Enter **Start of Funding** and **End of Funding** in mm/yyyy format to indicate the dates of this person's involvement.
4. Select an option from the **Role** during funding drop-down.
5. Select **Save**.
6. Repeat the search to add more.

Use the **Edit** and **Delete** links to update or remove the funding source as necessary.

Other Sources of Support

Includes Funding Source, Support Type, Project Number, Project Role, and Award Start Date.

To add additional support:

1. Select the **Add Another Source** button to display fields for editing.

Search for support or create new funding source:

To search:

- a. Select the magnifying glass icon next to the **Funding Source** field.
- b. Search for support entering the parameters given and selecting **Search Funding Sources** button.

- c. From the result list, click the **Select** link from the **Action** column for the correct project.

NOTE: You can edit this information using the **Edit** link before selecting.

To create:

- a. Select the magnifying glass icon next to the **Funding Source** field.
 - b. Select the **Create New Funding Source** button.
 - c. Update the fields. Required fields show a red asterisk (*).
 - d. Select **Save**.
 - e. Select the created source from the results list, by clicking the **Select** link.
2. Enter **Start of Funding** and **End of Funding** in mm/yyyy format.
 3. Select an option from the **Role during funding** drop-down.
 4. Enter the **Other role description** if *Other* was selected for **Role during funding**.
 5. Select **Save**.
 6. Repeat the search to add more.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary.

9.4 Degrees

Click on the collapsed panel to display degree details. xTRACT displays a list of completed degrees and associated data in reverse chronological order, with incomplete degrees following.

The **Source** of degrees is displayed as read-only as *xTRACT* (meaning that the degree was added to the person in xTRACT) or as *Commons Profile* (meaning that the degree is from the Commons Personal Profile of the person).

Select the **Edit** button to open the fields for editing.

To add a degree:

1. Select the **Add Another Degree** button.
2. Update the fields:
 - **Degree:** Select from the list
 - **Other Degree Text**
 - **Degree Date:** Enter in MM/YYYYY format

- **Terminal Degree:** Select the **Yes** or **No** radio button as appropriate. When the **Yes** button is selected, the terminal degree indicator (*This is your terminal degree.*) displays next to the degree details in the view.
 - **Degree Status:** Select Completed or In Progress, as appropriate
 - **Degree Institution:** Enter the institution name, one institution per degree. You search for an institution by selecting the magnifying glass search icon.
3. Select the **Save This Degree** button to save your changes.
 4. Repeat for any additional degrees.

Use the **Edit** and **Delete** links in the **Action** column to update or remove degree information as necessary. Degrees with *Commons Profile* as a **Source** cannot be deleted.

9.5 Employment

Click on the collapsed panel to display information about post-training employment positions. The employment positions are categorized as follows:

- Primary Position
- Current Positions
- Past Positions

The **Source** of positions is displayed as read-only as *xTRACT* (meaning the position was added or updated for the person in xTRACT) or as *Commons Profile* (meaning the position is from the Commons Personal Profile of the person).

Select the **Edit** button for the appropriate position type to open the fields for editing.

To add employment:

1. Select the **Add Employment** button.
2. Provide the following information:
 - **Faculty Teaching Position:** Select from the drop-down.
 - Professor; Associate Professor; Assistant Professor; Instructor; Other
 - **Academic Administrative Position:** Select from the drop-down.
 - President; Vice President; Dean; Assistant or Associate Dean; Chairperson of Department (or Director); Other
 - **Primary Employment Indicator:** Select the **Yes** or **No**.
 - **Full Time Employment Indicator:** Select **Full-Time** or **Part-Time**
 - **Employment Position**
 - **Institution:** Enter the institution or select the icon to open a search box

- **Primary Department of Position:** Enter the department or select the icon to open a search box
 - **Start Date:** Select a date in MM/YYYY format.
 - **End Date:** Select a date MM/YYYY format.
3. Select the **Save** button to save your changes.
 4. Repeat to add another.

Use the **Edit** and **Delete** links in the **Action** column to update or remove the funding source as necessary. Positions with a **Source of Commons Profile** cannot be deleted.

9.6 Create xTRACT Person

In order to create an xTRACT person, you must [first perform a search](#) to verify that the person record does not already exist. Verify that the results of the search – displayed in the **Person(s)** table – do not include the person you are creating.

To continue creating the xTRACT person, follow the steps below.

1. Enter the person data in the designated fields.
 - **Prefix:** Select an option from the list.
 - **First Name** (required)
 - **Middle Name**
 - **Last Name** (required)
 - **Suffix:** Select an option from the list.
 - **Email Address** (required)
2. Select the **Create xTRACT Person** button to save the changes.

*You can cancel the action at any time without saving changes by selecting the **Cancel** button.*

The screenshot shows a web interface for creating a person. On the left, there is a sidebar with a 'Search Persons' section and an 'Actions' section containing 'Invite Person to Create a Profile' and 'Create xTRACT Person'. The main content area is titled 'Create xTRACT Person' and contains a form with the following fields: 'Prefix' (a dropdown menu with '-- Select --'), 'First Name' (a required text input field), 'Middle Name' (a text input field), 'Last Name' (a required text input field), 'Suffix' (a dropdown menu with '-- Select --'), and 'Email Address' (a required text input field). Below the form are two buttons: 'Create xTRACT Person' and 'Cancel'.

Figure 96: Create xTRACT Person

After saving, the screen updates to show the addition in the **Person(s)** table. Repeat the process using the **Add Person** button if additional persons need to be added.

Use the **Edit** link to edit the *xTRACT Person Profile*. Refer to the topic titled [xTRACT Person Profile on Page 160](#) for more information.

10 Institution Data

Select the **Institution Data** tab to display options form maintaining Institution Information. Refer to the related topic for more information on the following:

- Maintain Programs
- Maintain Funding Sources
- Create New Program
- Create New Funding Sources

10.1 Search for Programs at the Institution

To access the search screen, select the **Maintain Programs** link under the **Institution Information** section of the *Institution Home* page.

To search for a program:

1. Select the **Maintain Programs** link under the **Institution Information** section of screen to display the *Search for Program(s) at <Institution>* fields.
2. Enter the appropriate search criteria in the *Search for Program(s)* fields.
 - **Program Name**
 - **Program Description**

IMPORTANT: The search will return only records exactly matching the entered criteria. For this reason, a wild card is permitted in the fields. Enter a percent sign (%) to search with a wild card if needed. The % can be entered multiple times in one entry (e.g., %A%B).

The search feature ignores punctuation and is not case sensitive.

3. Select the **Search** button.

All records matching the entered search criteria display in the **Program(s)** section of the screen. If no programs meet the entered criteria, the following message displays: *Nothing found to display*.

The programs are presented in a table and include the following related information:

- **Program Name**
- **Program Description**

- **Action**

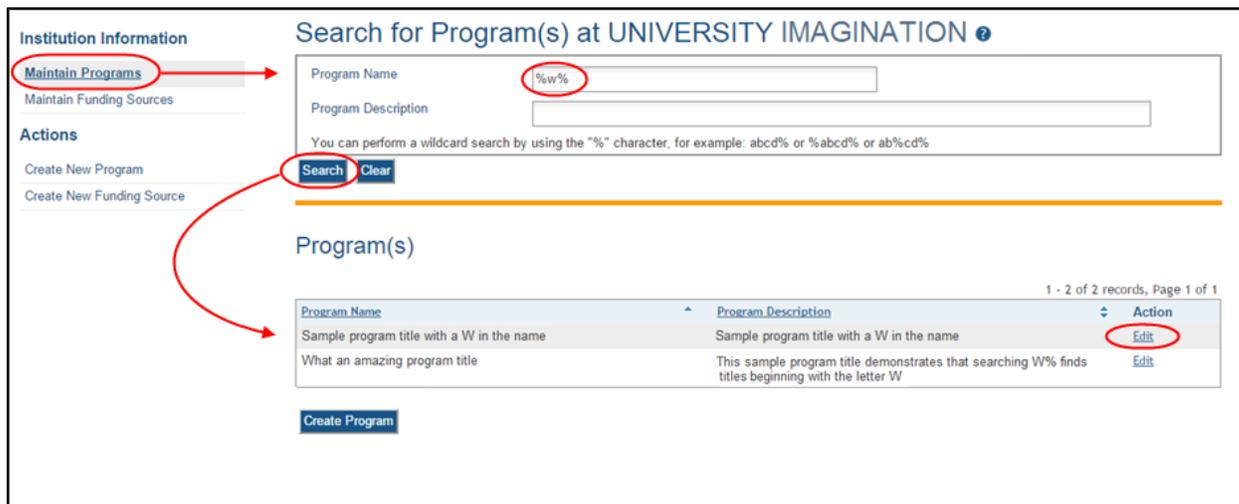


Figure 97: Searching for Programs at Institution

NOTE: After searching for programs, the **Create Program** button becomes available. Select this button to access the *Create Program* fields. Refer to the topic titled [Create a Program at Institution on Page 168](#) more information.

Use the **Edit** link for a specific program to modify that program.

10.1.1 Create a Program at Institution

Access the *Create Program* screen by:

- Selecting the **Create New Program** link under the **Actions** section of the *Institution Home* page
- Selecting the **Create Program** button on the *Search for Programs at <Institution>* screen

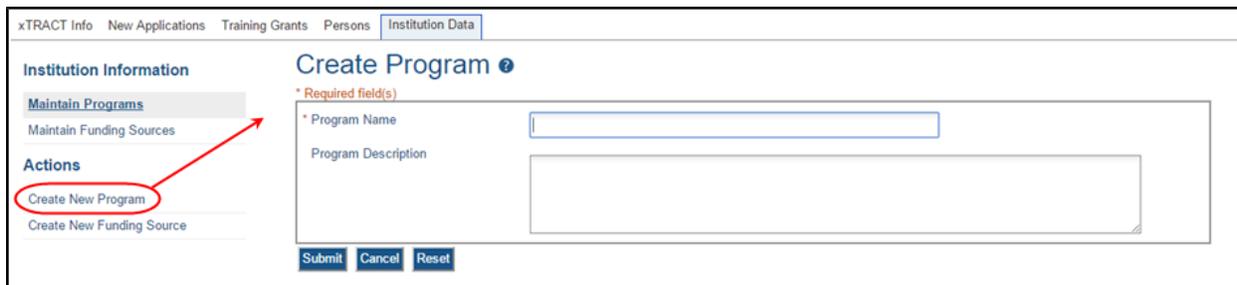


Figure 98: Create Program Screen

1. Enter the **Program Name**. This field is required and has a limit of 60 characters.
2. *Optional*: Enter a description of the program in the **Program Description** field. This is an optional field and can be left blank. This field has a limit of 250 characters.
3. Select the **Submit** button to save the changes.

*You can cancel the action at any time without saving changes by selecting the **Cancel** button.*

10.1.2 Update Programs

Use the Update Programs screen to edit a program's name and description. To access this screen, select the **Edit** link after successfully [searching for the program](#).

1. Update the name of the program in the **Program Name** field and/or the description of the program in the **Program Description** field as necessary.
2. Select the **Submit** button to save the changes.

*You can cancel the action at any time without saving changes by selecting the **Cancel** button.*

After submitting, the *Update Program* screen shows the following message: *Program was updated successfully*.

Figure 99: Update Program

10.2 Maintain Funding Sources

Select the **Maintain Funding Sources** link under the **Institution Information** section of the *Institution Home* page.

To search for a funding source:

1. Enter and/or select the appropriate search criteria in the *Maintain Funding Sources* fields:

- **Type of Funding**
- **Funding Source Number**
- **Organization**
- **Start Date**
- **End Date**
- **Project Title**

2. Select the **Search Funding Sources** button.

You can use the **Clear** button to remove the entered search criteria and start over.

Matching records display beneath the search fields. The information includes **Project Title**; **Type**; **Number**; **Organization**; **Project Dates** (if available); and available **Action** links.

Select the **Edit** button to modify a specific funding source.

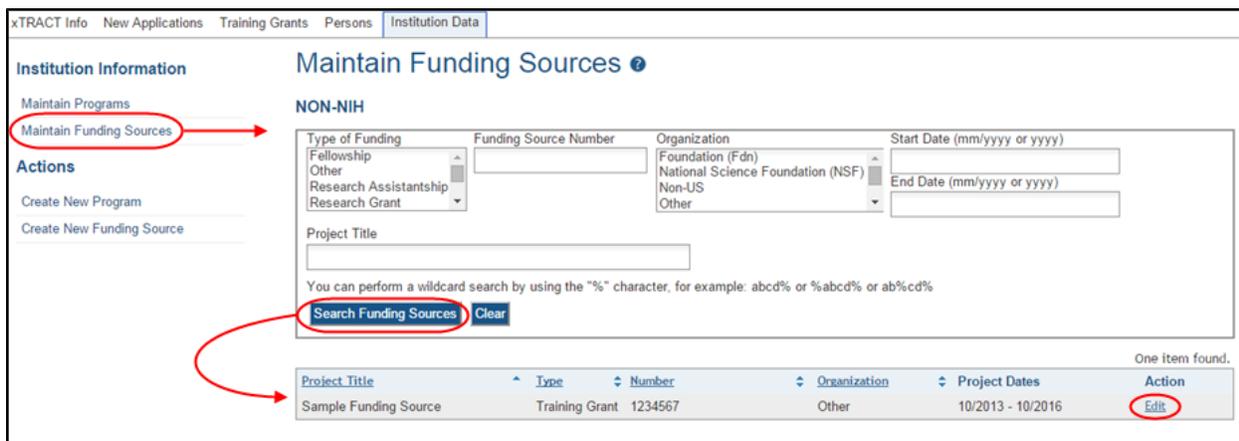


Figure 100: Search for Funding Sources

10.2.1 Create Funding Source

Access the *Add Funding Source* screen by selecting the **Create New Funding Source** link under the **Actions** section of the *Institution Home* page.

To add the funding source:

1. Enter the following fields as appropriate, taking note of the required fields marked with an asterisk (*).
 - **Funding Source Project Title** (required): Enter the project title for the funding source.

- **Type of Funding Source** (required): Select the appropriate type of funding source from the list: Fellowship; Other; Research Assistantship; Research Grant; Scholarship; Teaching Assistantship; Training Grant
- **Funding Source Number**: Enter a funding source number as needed.
- **Funding Source Organization**: Select the appropriate choice from the list: NIH; Foundation; National Science Foundation (NSF); Non-US ; Other; Other Federal; University
- **Funding Source Start Date**: Enter as MM/YYYY or YYYY
- **Funding Source End Date**: Enter as MM/YYYY or YYYY
- **Funding Source Description**: Enter a description of the source as needed. This field has a maximum limit of 200 characters.

2. Select the **Save** button to save the information.

Figure 101: Add Funding Source

10.2.2 Edit Funding Source

xTRACT users with the proper privileges can maintain an institution's funding sources for use in research training data sets for progress reports, revisions, or renewals on existing training grants or for new applications.

The *Edit Funding Source* screen is used to maintain the funding source data.

To access this screen, select the **Edit** link after successfully [searching for the funding source](#).

To maintain a funding source:

1. Complete the fields in the **Edit Funding Source** section.

- **Funding Source Project Title** (required): Enter the project title for the funding source.
- **Type of Funding Source** (required): Select the appropriate type of funding source from the list: Fellowship; Other; Research Assistantship; Research Grant; Scholarship; Teaching Assistantship; Training Grant
- **Funding Source Number**: Enter a funding source number as needed.
- **Funding Source Organization**: Select the appropriate choice from the list: NIH; Foundation; National Science Foundation (NSF); Non-US ; Other; Other Federal; University
- **Funding Source Start Date**: Enter as MM/YYYY or YYYY
- **Funding Source End Date**: Enter as MM/YYYY or YYYY
- **Funding Source Description**: Enter a description of the source as needed. This field has a maximum limit of 200 characters.

2. Select the **Save** button to save the information.

The screenshot shows the 'Edit Funding Source' form within the 'Institution Data' section of the xTRACT application. The form contains the following fields and values:

- Funding Source Project Title**: Sample Funding Source
- Type of Funding Source**: Training Grant
- Funding Source Number**: 1234567
- Funding Source Organization**: Other
- Funding Source Start Date**: 10/2013 (mm/yyyy or yyyy)
- Funding Source End Date**: 10/2016 (mm/yyyy or yyyy)
- Funding Source Description**: This is my sample funding source description...

At the bottom of the form, there are two buttons: 'Save' (circled in red) and 'Clear'.

Figure 102: Edit Funding Source