

xTrain Termination of Fellowships Quick Reference Guide for Institution Users

1. The PD/PI (Fellow), Sponsor, Sponsor Delegate, or BO Accesses the Trainee Roster

- The PD/PI (Fellow), Sponsor, Sponsor Delegate, or Business Official (BO) logs into eRA Commons and selects the **xTrain** tab to bring up the *My Grants* screen. The user is presented with a list of his/her grants.
- The user finds the Fellowship award to be terminated and selects the **View Trainee Roster** link.

NOTE: Although the Fellow is the PD/PI of the Fellowship, the award is terminated through xTrain's *Trainee Roster* screen, because it is a research training award.

NOTE: Reminders are sent 30 days before the end date of the latest Fellowship to the PD/PI (Fellow), the Sponsor, the Sponsor Delegate, and the BO to prompt them to terminate the PD/PI (Fellow). Reminders are sent to the same individuals when the end date has passed and also 14 days after the end date.

2. The User Initiates a Termination Notice (TN)

The Termination Notice for a Fellow can be initiated by the PD/PI (Fellow), Sponsor, or Sponsor Delegate. The individual that initiates the award termination is the "user."

- The user locates the most recent Fellowship on the *Trainee Roster* screen.
- The user selects the **Initiate TN** link for the appropriate Fellowship to be terminated.
- The user is presented with a Termination Notice (PHS 416-7) with fields pre-populated with data from the eRA system.
- The **Modify Termination Date** button within the Termination Notice can be used for early terminations of the Fellowship.
- The user reviews the Termination Notice and makes any necessary edits/additions (such as updating the email address of the PD/PI (Fellow) and entering/uploading the training provided), selects the BO who could **Submit** the form, and then presses **Save** to retain the form.

NOTE: For Federal or Foreign (the Institution is outside the US) Fellowships, the PD/PI (Fellow), and the Sponsor, as well as the BO can submit the Termination Notice.

- The Termination Status is set according to the role of the individual who initiated it: Either *In Progress PI*, *In Progress Sponsor*, or *In Progress BO*.

NOTE: Additional action buttons appear at the bottom of the form.

- The user decides who will be the next reviewer of the Termination Notice, and routes it to that individual.
 - The Sponsor can route it to either the Fellow or the BO. The Termination Status is set to either *In Progress PI* or *In Progress BO*, depending on who will be the next reviewer.
 - The Fellow can route it to either the Sponsor or the BO. The Termination Status is set to either *In Progress Sponsor* or *In Progress BO*, depending on who will be the next reviewer.
 - At least one individual in addition to the person who initiated the Termination Notice should review the Termination Notice.
 - The system runs the validation process and presents any errors or warnings to be addressed. Any errors must be corrected prior to routing. If error-free (warnings are OK), the form is routed. The Electronic Signature of the user is recorded, and the Termination Status is changed to that of the next reviewer.
 - Except for Foreign or Federal Fellowships, the Fellowship must be routed to the BO for submission to the Agency.
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NOTE (If no action is taken):

- Termination Notices are automatically routed from the Sponsor to the BO after 14 days
 - Termination Notices are automatically routed from the PD/PI (Fellow) to the BO after 14 days
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3. The BO Reviews and Submits the TN to the Agency

- The BO logs into eRA Commons, selects the **xTrain** tab and is presented with a *Search* screen. The BO enters search criteria and clicks **Search**. The BO selects the **View Trainee Roster** link for the grant.
- From the *Trainee Roster* screen, the BO clicks the **Process TN** link to open the form. The BO reviews the TN and clicks the **Save & Submit to Agency** button.
 - The system runs the validation process and presents any errors or warnings to be addressed by the BO.
 - If error-free (warnings are OK), the form is submitted, the BO's Electronic Signature is recorded and the Termination Status is changed to *Pending Agency Review*.

4. The Agency Processes the TN

1. The Agency can accept the Termination Notice or return it with comments.
2. The Agency cannot immediately accept the TN if the end date of the Fellowship was modified and the stipend does not agree with the Notice of Award (NoA). In such a situation, the Agency user has to put the Termination Notice on hold until the NoA is modified.

3. An Email notification is sent is sent to the PD/PI (Fellow), BO, Sponsor, and Sponsor Delegate when a Fellowship Termination Notice is either accepted by the Agency or returned to the Institution with comments.

5. Where Can I find xTrain Help—User Guide, Quick Reference Guides, FAQs, and Training Materials?

Check out: http://era.nih.gov/training_career/index.cfm.