



Electronic Research Administration
National Institutes of Health, Office of Extramural Research



Powering the Advancement of Science

xTrain Termination of Appointments Quick Reference Guide for Institution Users

1. The PD/PI Accesses xTrain Trainee Roster

- The Project Director/Principal Investigator (PD/PI) logs into eRA Commons and selects the **xTrain** tab to bring up the *My Grants* screen. The PD/PI is presented with a list of his/her grants.
- The PD/PI finds a specific grant and selects the **View Trainee Roster** link.

2. The PD/PI Initiates a Termination Notice (TN)

- The PD/PI locates the Trainee on the *Trainee Roster* screen and selects the **Initiate TN** link.
- The PD/PI is presented with a 416-7 TN form with fields pre-populated with data from the eRA system.
- The PD/PI reviews the TN and makes any necessary updates/additions (such as changing the email address of the Trainee if it has changed or entering/uploading a description of the training provided) and selects the Business Official (BO) who will later **Submit** the form and then presses **Save** to retain the form.

NOTE: The Trainee can also enter/upload a description of the training provided.

- If Trainee does not have an eRA Commons account, he/she must be invited to register and must respond to that invitation before the PD/PI can route the TN to the Trainee. See the **Trainee Account Registration** below for these additional steps.
- The **Modify Termination Date** button within the TN can be used for early terminations and eliminates the need for an Amendment because when the Appointment period end date of the Appointment is changed, the Appointment is automatically amended.
- The Termination Status is set to *In Progress PI*.

3. The PD/PI Routes the TN to the Trainee

Additional action buttons appear at the bottom of the form.

- The PD/PI clicks **Save & Route to Trainee**.
 - The system runs the validation process and presents any errors or warnings to be addressed by the PD/PI. If the form is error-free it will be routed to the Trainee, but if not, the errors must be corrected before proceeding.
 - The Termination Status is changed to *In Progress Trainee*.

4. The Trainee Completes the Form and Routes it to the PD/PI

- The Trainee logs into eRA Commons and selects the **xTrain** tab to bring up the *Trainee Appointments and Terminations* screen. The Trainee selects the **Process TN** link, completes the appropriate form fields and clicks the **Save** button to retain changes.
- Once complete, the Trainee clicks the **Save & Route to PI** button to route the form back to the PD/PI.
 - The System runs the validation process and presents any errors or warnings to be addressed by the Trainee. If error-free (warnings are OK), the form is routed, the Trainee's Electronic Signature is recorded and the Termination Status is changed to *In Progress PI*.

NOTE (If no action is taken):

- Termination Notices are automatically routed from the Trainee to the PD/PI after 14 days.
 - Termination Notices are automatically routed from the PD/PI to the BO after 14 days.
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5. The PD/PI Reviews the TN and Routes it to the BO

From the *Trainee Roster* screen, the PD/PI selects the **Process TN** link to open the form. The PD/PI reviews the form and clicks **Save** to retain any updates. When satisfied with the form, the PD/PI clicks the **Save & Route to BO** button to route the form to the Business Official for submission.

- The system runs the validation process and presents any errors or warnings to be addressed by the PD/PI.
- If error-free (warnings are OK), the form is routed, PD/PI's Electronic Signature is recorded and Termination Status is changed to *In Progress BO*.

NOTE: If no action is taken by PD/PI in 14 business days, the system will route the form to the BO, send notification, and change status to *In Progress by BO*.

NOTE: Only the PD/PI can submit a Termination Notice for K12, KL2, R25, R90 and KM1 Appointments. For these Appointments, instead of routing the TN to the BO, the PD/PI submits them to the Agency.

6. 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 PD/PI 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*.

7. The Agency Processes the TN

- The Agency can accept the TN or return it with comments.
- An email is sent to the PD/PI and the BO.

8. 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.

Trainee Account Registration within xTrain Actions

A. The PD/PI Initiates a Termination Notice (TN); The Trainee's Commons User ID (Unknown or Does Not Exist)

- From the *My Grants* screen, the PD/PI selects the **Initiate TN** link for the chosen Trainee.
- The PD/PI is placed in TN form.

B. The PD/PI Invites the Trainee to Register

- The PD/PI enters/updates required information and clicks **Save**.
- The PD/PI is presented with the *Invite Trainee to Register* screen with the following options:
 - **Invite Trainee Now:** An email with link and registration instructions is sent to the Trainee and the PD/PI is placed back in the TN form. A **Re-invite Trainee to Register** button is added at the bottom of the form in case the PD/PI needs to resend the invitation for any reason.
 - **Invite Trainee Later:** The PD/PI is placed back in the TN form and the **Invite Trainee to Register** is added at the bottom of the form for later use.

NOTE: The Trainee must be invited to register and must follow the emailed registration instructions before the PD/PI can route the TN to the Trainee.

C. The Trainee Responds to the Registration Email

- The Trainee receives an email and follows the registration link to create an account.
- The Trainee is presented with a *Create New Account* screen and supplies the requested information then clicks **Continue**.
 - The system searches for any previous support records and presents the results in the *Verify NIH Support* screen.
- Trainee marks any identified records as *Correct* or *Incorrect* and clicks **Continue Account Request**.

NOTE: It takes 2-5 days for the Agency to process the registration.
