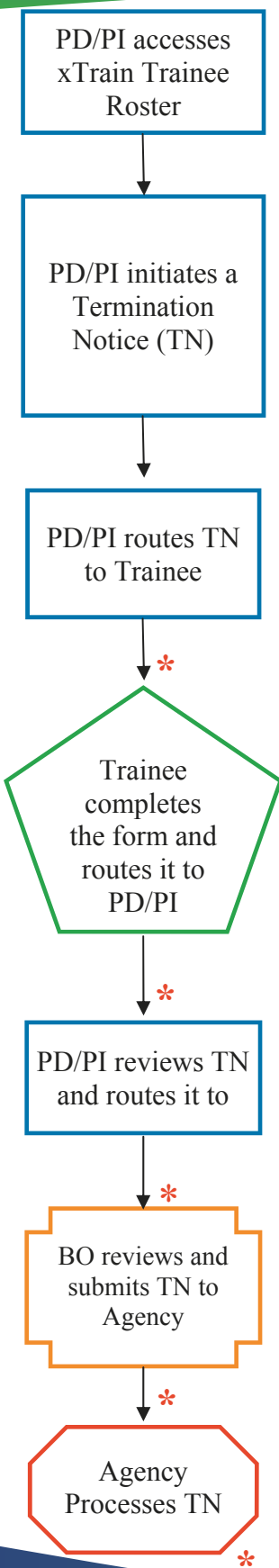


# xTrain—Termination Notices Quick Reference



1. Project Director/Principal Investigator (PD/PI) logs into eRA Commons and selects the *xTrain* tab to bring up the **My Grants** screen. PD/PI is presented with a list of his/her grants.
2. PD/PI finds specific grant and selects the **View Trainee Roster** link.
3. PD/PI locates trainee on *Trainee Roster* screen and selects *Initiate TN* link.
4. PD/PI is presented with a 416-7 TN form with fields pre-populated with data from the eRA system.
5. PD/PI reviews the TN and makes any necessary updates/additions, selects the Business Official (BO) who will later submit the form and *Saves* the form.
  - If Trainee does not have a 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 *Trainee Account Registration within xTrain for additional steps*.
  - The Modify Termination Date button within the TN can be used for early terminations and the period end date of the Appointment is automatically amended.

*Termination Status is set to "In Progress PI"*
6. Additional action buttons appear at the bottom of the form. PD/PI clicks **Save & Route to Trainee**.
 

*System runs validation process and presents any errors or warnings to be addressed by the PD/PI. Any errors must be corrected prior to routing. If error-free (warnings OK), the form is routed.*

*Termination Status is changed to "In Progress Trainee"*

*If no action is taken by Trainee in 14 business days, the system will route the form back to the PD/PI, send notification and change status to "In Progress PI".*
7. Trainee logs into eRA Commons and selects the *xTrain* tab to bring up the **Trainee Appointments and Terminations** screen. Trainee selects the **Process TN** link, completes appropriate form fields and clicks the **Save** button to retain changes.
8. Once complete, the Trainee clicks the **Save & Route to PI** button to route the form back to the PD/PI.
 

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

*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".*
9. From the **Trainee Roster** screen, PD/PI selects the **Process TN** link to open the form. 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.
 

*System runs validation process and presents any errors or warnings to be addressed by the PD/PI. If error-free (warnings OK), the form is routed, PD/PI's Electronic Signature is recorded and Termination Status is changed to "In Progress BO".*
10. BO logs into eRA Commons, selects the *xTrain* tab and is presented with a search screen. PD/PI provides search criteria and clicks **Search**. BO selects the **View Trainee Roster** link for the grant.
11. From the Trainee Roster screen, BO clicks the *Process TN* link to open the form. BO reviews TN and clicks the **Save & Submit to Agency** button.
 

*System runs validation process and presents any errors or warnings to be addressed by the BO. If error-free (warnings OK), the form is submitted, the BO's Electronic Signature is recorded and the Termination Status is changed to "Pending Agency Review"*
12. Agency can accept the TN or return it with comments.

**KEY**



\* Email notification sent

## Trainee Account Registration within xTrain Actions

PD/PI initiates Termination Notice (TN); Trainee Commons User ID unknown or does not exist

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

PD/PI Invites Trainee to Register

3. PD/PI enters/updates required information and clicks *Save*.
4. PD/PI is presented with the *Invite Trainee to Register* screen with the following options:
  - *Invite Trainee Now*: Email with link and registration instructions is sent to Trainee and 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*: 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.

*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.*

Trainee responds to registration email

1. Trainee receives email and follows the registration link to create an account.
2. Trainee is presented with a *Create New Account* screen and supplies the requested information then clicks *Continue*.

*System searches for any previous support records and presents the results in the **Verify NIH Support** screen.*

3. Trainee marks any identified records as 'Correct' or 'Incorrect' and clicks *Continue Account Request*.

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

### KEY

□ PD/PI

◡ Trainee