



## xTrain: Termination of Fellowships

### *A 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

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

---

**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.

**Note:** Additional buttons appear at the bottom of the form

---

*Progress BO.*

- 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.

---

**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
- 

### 3. The BO Reviews and Submits the Termination Notice 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 Termination Notice

- The Agency can accept the Termination Notice or return it with comments.
- 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.
- 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.