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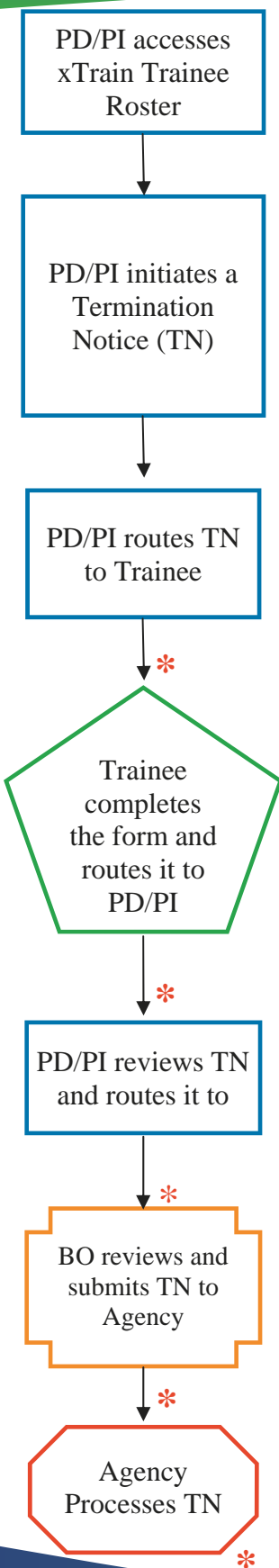
1. Project Director/Principal Investigator (PD/PI) logs into eRA Commons and selects the *xTrain* tab to bring up the *My Grants* screen. PD/PI is presented with a list of his/her grants.
2. PD/PI finds specific grant and selects the *View Trainee Roster* link.

PD/PI initiates a Termination Notice (TN)

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."

PD/PI routes TN to Trainee

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."

Trainee completes the form and routes it to PD/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/P1.

   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."

PD/PI reviews TN and routes it to *

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."

BO reviews and submits TN to Agency *

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."

Agency Processes TN *

12. Agency can accept the TN or return it with comments.

*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**