

xTrain Terminations Transcript

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Welcome to this video tutorial on xTrain. This video focuses on how a principal investigator initiates and submits the PHS 416-7 Termination Notice for a trainee. xTrain is the eRA Commons module that permits principal investigators (PI), university administrators, and trainees to electronically prepare and submit appointment and termination notices associated with institutional research training grants.

This video examines the process flow for terminations for institutional research training programs. The flow for terminating fellowships, career development awards, and research education awards differs. Contact your NIH program officer for more information concerning terminations of these award types.

The process starts by you, the PI, initiating a termination notice for the trainee who is leaving the program. To access the list of trainees, log into eRA Commons.

Once you are logged into eRA Commons, click on the apps icon in the upper left corner. From the menu, scroll down and select the xTrain option to open the xTrain home screen.

The xTrain home screen provides a table of your awarded and sponsored grants with quick filters to allow you to search quickly for a specific grant.

Once you find the award you are looking for, you access the Trainee Roster by clicking on the three-dot ellipses icon in the Number column and selecting Trainee Roster from the menu. Clicking the Grant number also takes you to the Trainee Roster.

With the Trainee Roster screen now displayed, click the Jump to Roster Table button on the right side to go down to the list of trainees. The trainee table provides the trainee's name, the appointment status, and the termination status, as well as other information.

The Termination Status Column displays the following labels: In Progress PI, which means the PI has started the notice but has not routed it to the trainee, or business official; In Progress Trainee, which means the trainee has the notice; In Progress BO, which indicates the PI has routed the notice to the business official for review; Pending Agency Review, which indicates the business official has routed the notice to the awarding agency for review; and finally, a green check mark icon indicating the agency has accepted the termination of the trainee.

To initiate the termination notice, click the three-dot ellipses icon after the trainee's name to access the available actions. From the menu that is displayed, select Initiate Termination Notice. Note, if you do not see the Initiate Termination Notice option, it means there is an existing appointment in progress for the selected trainee.

This opens the Termination Notice screen. You must complete the required fields which are marked with an asterisk. The first two required fields are the Termination Date and the Business Official to whom the notice will eventually be routed to for review and submission to agency. Note this is a 'type-ahead field', start typing some characters for the name and the system will display all matching options. Then select the business official from the displayed list.

If the stipend amount has changed, edit the amount by updating the stipend field. Note for the stipend field, use whole dollar values. Only the PD/PI can modify the stipend on an early termination for T, K and R grants—delegates cannot modify the stipend. On fellowships, the business official can make changes to the stipend as well.

In the Other Relevant PHS section, update the number of months for National Health Service Corps Scholarship and Kirschstein-NRSA fields as appropriate. In this case, since the trainee has received other Kirschstein-NRSA funding, the value cannot be left at 0.

The other remaining fields can be completed by the trainee once it has been routed to them.

Once the initial fields are completed, click the Save as Draft button at the bottom of the screen. A confirmation screen is presented. Click Save to complete the draft of the termination notice. A success message is displayed at the top of the screen. Additionally, you see more action options at the bottom of the screen. The status of the termination notice is now In Progress PI

To either continue working on the termination notice or route it to the trainee, go back to the training roster, find the In Progress section for the award card and click on Terminations. This opens the Pending Terminations Form. Click on the name of the trainee whose termination notice you want to work on.

With the Termination Notice for the trainee now open, scroll down to the Take Action section of the screen. Go to the Save & Route to Trainee box. Add any comments you wish in the comments box. These will appear in the email notification the trainee receives. When done, click Send. Review the information on the confirmation screen and click the Save & Route to Trainee button.

A success message is displayed at the top of the termination notices screen. Notice too that the fields are no longer editable, and the only action in the Take Actions section at the bottom is to recall the notice. The Termination Status is now In Progress Trainee.

The trainee receives an email with instructions to go to xTrain and review the form, make changes as needed, and route back to the PI. Once that is done and the trainee routes it back to the PI, the PI receives an email alerting them that the trainee has completed the task. The Termination Status is now In Progress PI.

As the PI, you will navigate back to the Pending Terminations Forms for the award and click on the trainee's name to open the Termination Notice.

Review the information the trainee provided. If you need to, you can make any changes and send back to the trainee by using the Save & Route to Trainee box. If you are good with the information in the notice, you can send it to the business official for review and routing to the agency.

In the Route to Business Official box of the Take Action section, add any additional comments you want added to the email notification. When done, click the Send button. Review the information in the confirmation window and click the Save & Route to BO button if you are done. A Success message is displayed at the top of the Termination Notices screen. The Termination Status is now In Progress BO.

The business official receives an email alerting them that the notice is ready for review. The business official logs into Commons and reviews the Termination Notice. They can work on the notice and save as draft, return it to the PI, or return it directly to the trainee. Or if the information is good, they can Route to Agency for final review and acceptance. The Termination Status is now Pending Agency Review.

When the agency accepts the termination notice, the status changes to a green checkmark icon. The word Accepted is displayed when you hover the cursor over the icon. The termination process is now complete.

There are a number of resources available to you should you need help with xTrain.

- xTrain Online Help <https://www.era.nih.gov/erahelp/xtrain/default.htm>
- Overview of xTrain <https://www.era.nih.gov/help-tutorials/xtrain/xTrain-Overview.htm>
- xTrain FAQs <https://www.era.nih.gov/faqs.htm#XVI>
- xTrain Video Tutorials <https://www.era.nih.gov/era-training/era-videos.htm#xTrain>

If you need additional help, or are experiencing a technical issue with xTrain, please contact the eRA Service Desk. <https://www.era.nih.gov/need-help>

This concludes this video tutorial that focuses on how a principal investigator initiates and submits the PHS 416-7 Termination Notice for a trainee. Thank you for watching.