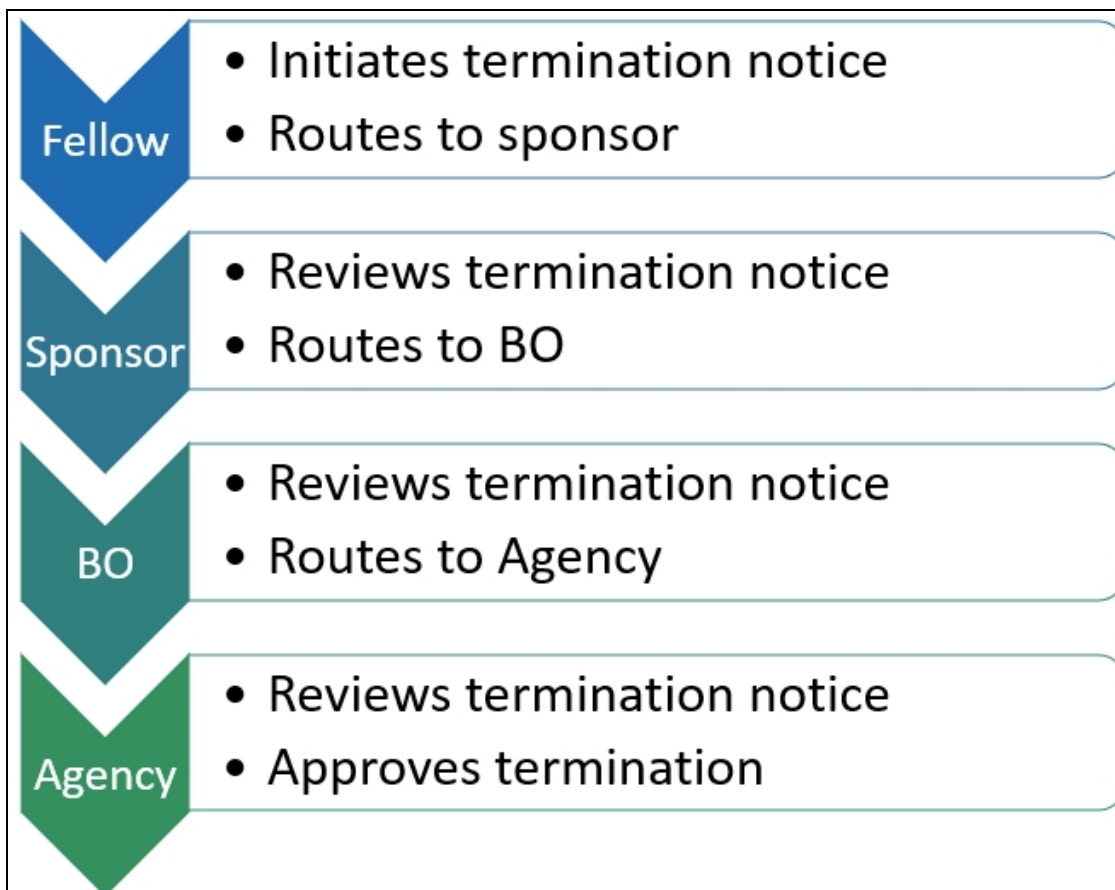## Terminating Fellowships

Users can initiate and submit termination notices for fellowships via xTrain. Once the Fellowships are terminated, they will be automatically closed. As with training appointments, institution users will be able to terminate Fellowships early. Internal users will not be able to accept the TN until the Fellowship award is revised to show the new end date.

**Fellow**
- Initiates termination notice
- Routes to sponsor

**Sponsor**
- Reviews termination notice
- Routes to BO

**BO**
- Reviews termination notice
- Routes to Agency

**Agency**
- Reviews termination notice
- Approves termination

The Termination Notice for a Fellow can be initiated by the PD/PI (Fellow), business official (BO), Sponsor or Sponsor Delegate. The flow diagram indicates the preferred process:  the Fellow initiates the termination notice; the Sponsor routes and certifies it; and the business official submits it to the Agency.

The individual that initiates the award termination is the *user*.

- The user locates the most recent Fellowship and displays its Trainee Roster screen.
- The user selects Initiate Termination Notice.
- The Termination Notice screen is displayed with fields pre-populated with data from the eRA system.
- 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).
- The user routes the Termination Notice onward to the next reviewer.

**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.

- The Termination Status is set according to the role of the individual who initiated it: *In Progress PI*, *In Progress Sponsor*, or *In Progress BO*.
- Except for Foreign or Federal Fellowships, the Fellowship must be routed to the BO for submission to the Agency.
- Only the principal investigator (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 as well.

**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

Refer to the following topics for step-by-step instructions:
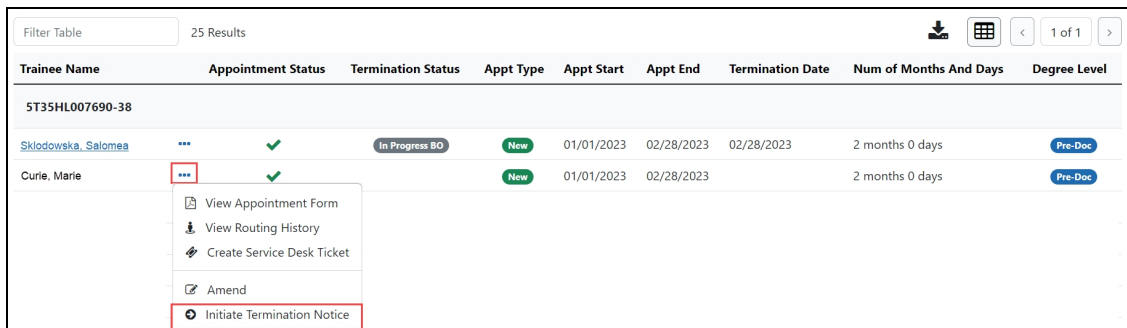
[Initiate a New Fellowship Termination](#)

*Process Fellowship Termination Notice by Sponsor on page 14*

## Early Terminations

If a Trainee terminates early, only the Appointment that is being terminated, as well as all previous Appointments, will get terminated with the early termination date.

### Initiate an early termination

1. In the Awarded Grants table, click the hyperlinked grant number to display the Trainee Roster screen.

2. Locate the trainee you wish to terminate. The **Filter table** field can be used to locate someone quickly if desired.



3. Click the ⋯ **Actions** button and select **Initiate Termination Notice**.The Termination Notice screen is displayed with some fields pre-populated with data from the system.

## Termination Notice
Ruth L. Kirschstein National Research Service Award

**Details for 1T23HL456789-38** •••

| Budget Period | Fiscal Year | Project Period | Grant Management Specialist | Program Official |
|---|---|---|---|---|
| 09/01/2022 - 08/31/2023 | 2022 | 05/01/1980 - 08/31/2025 | ✉ Ulam, Joseph | ✉ Rotblat, Stanislaw |

Curie, Marie •••

`Termination` `PRE-DOC`

Total NRSA Support Under This Award    Degree    Routing History

**Termination Date:** *

02/28/2023 📅

**Business Official** *

Franklin, Rosalind ▼

1 Results

| Id | Support Year | Start Date | End Date | Termination Date | Amount of Stipend/Salary | Standard Stipend Amount | Specialty Funding | Number of Months/Days | Status |
|---|---|---|---|---|---|---|---|---|---|
| 1920722 | 38 | 02/01/2023 | 03/31/2023 | 02/28/2023 | $ 2196 * | $26,352 | | 0 Months 28 Days | `Accepted` |

**Totals:** $2,196

### 🔖 Other Relevant PHS ⓘ

**Currently participating in NIH Loan Repayment Program**

⬤

**National Health Service Corps Scholarship** *

0

Number of Months

**Kirschstein-NRSA** *

0

Number of Months

**Other Kirschstein-NRSA training awards or fellowships**

0 Results

| Award Number ⇅ | From ⇅ | To ⇅ | Special Funding |
|---|---|---|---|
| No records found | | | |

### ⊞ Training Received ⓘ

**Summary Comments**

Provide a summary of the training, career development, or research education received and the research undertaken during fellowship or appointment period, and describe how it furthered your career. List publications, if any, resulting from the research during this period. List awards and career awards pending and received. If a fellowship or appointment is being terminated early, indicate the reason. Upload any supporting documentation

2000 characters remaining

**Supporting Documentation** (optional)

[ + Choose ] [ ✕ Cancel ]

Only pdf format, 6 MB maximum allowed

### 🔳 Post Award Details

| Activity | Organization | Type of Position |
|---|---|---|
| Select one ▼ | Select one ▼ | Select one ▼ |
| If other, please describe | If other, please describe | If other, please describe |

**Post Award Position**

**Position Title**

Ex: Assistant Professor

**Name Of Organization**

Ex: University of Maryland BC

**City**

Ex: Washington

**State**

Select One ▼

**Post Award Mailing Address**

**Address Line 1**

Ex: 123 Main St.

**City**

Ex: Washington

**State**

Select One ▼

**Zip**

Ex: 12345

**Email**

eRATest@mail.nih.gov

**Take Action**

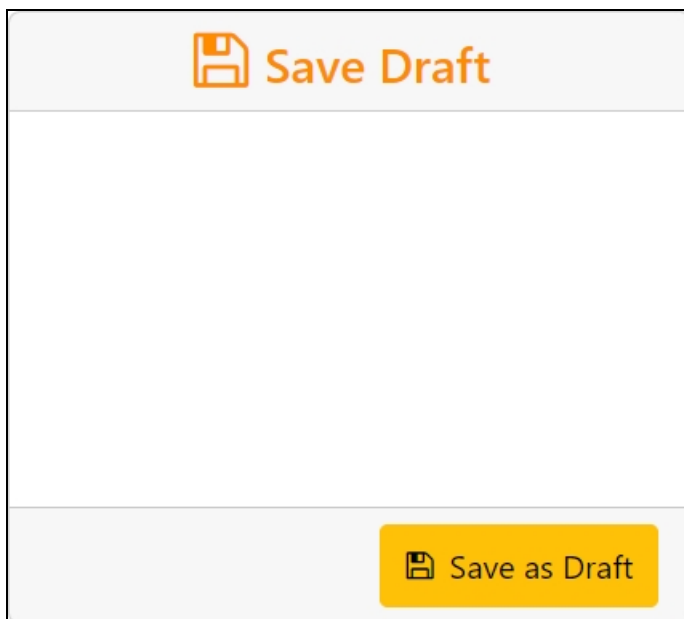[ 💾 Save Draft ]

[ 💾 Save as Draft ]

Cancel

4.  Modify the **Termination Date** as appropriate using MM/DD/YYYY format. The system will automatically recalculate the stipend.

    Only whole numbers are allowed in the **Amount of Stipend Salary** field. Only the principal investigator (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 (BO) can make changes as well.
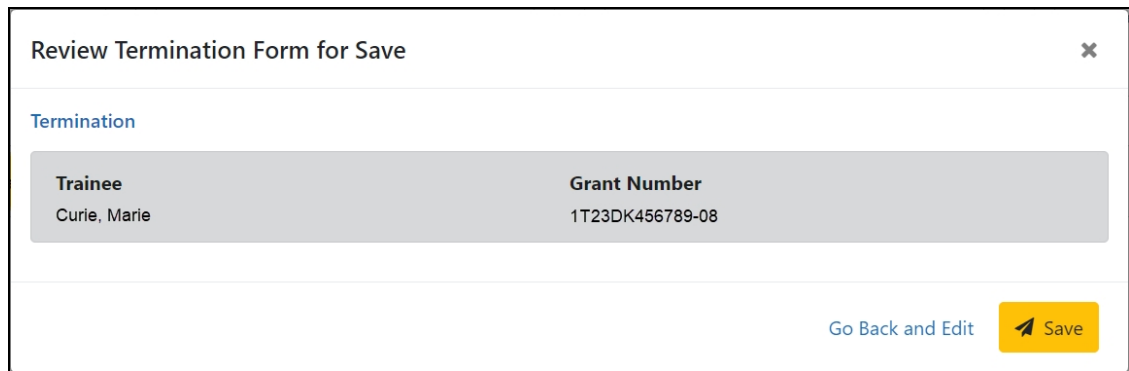
**NOTE:** When the end date is modified, and the appointment is for a partial year, sometimes the recalculated stipend amount will differ from the stipend amount calculated by the institution. The institution can modify the stipend based on its calculation. The Agency will approve the modified stipend, if it is within an appropriate range.

**IMPORTANT:** You must select the name of the business official (BO) who will submit the early termination notice to the agency.

## Save Draft



1.  Click the **Save as Draft** button. A confirmation message displays.

**Review Termination Form for Save** ✕

Termination

| Trainee | Grant Number |
|---------|--------------|
| Curie, Marie | 1T23DK456789-08 |

Go Back and Edit   ✈ Save

2.  Click the **Save** button. Your edits are saved and the form remains in your queue. The draft form is saved and displayed for review; in addition, new options are added to the **Take Action** section.

Once the draft early termination has been saved, it follows the same process as terminations:

1.  PD/PI routes early termination to trainee.

2.  Trainee reviews and routes early termination to PD/PI. If no action is taken by Trainee in 14 business days, the system will automatically route the form back to the PD/PI, send a notification to PD/PI, and change the status of the TN to **In Progress PI**.

3.  PD/PI reviews and routes early termination to BO.

4.  BO reviews and routes early termination to Agency.

5.  Agency reviews and approves early termination.

    Review the *Initiate a New Termination by PD/PI*, *Process Termination Notice by Trainee* and *Process New Termination Notice by BO* topics for more information.

**NOTE:** The PD/PI should make every effort to have the Trainee update their Personal Profile screen within Commons, specifically update their email address with their new (forwarding) email address, before the Trainee leaves the Institution.
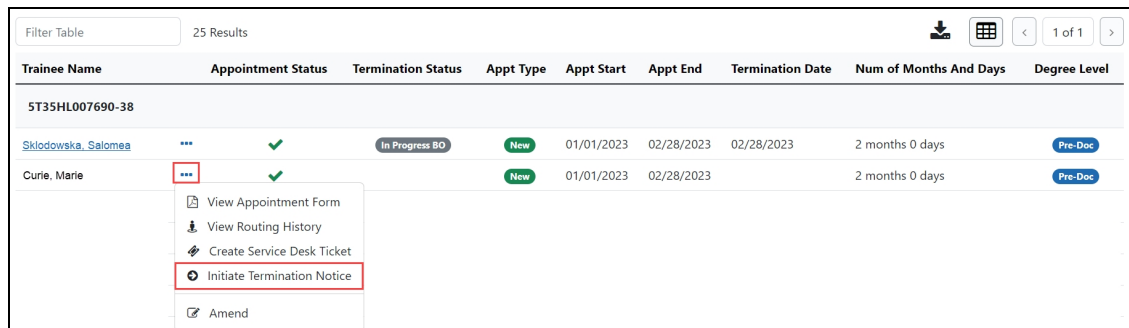
Otherwise, the PD/PI needs to know, and be able to provide, a forwarding email address for the Trainee to be entered within the Termination Notice.

## Initiate a New Termination

### Initiate a new termination

1.  In the Awarded Grants table, click the hyperlinked grant number to display the Trainee Roster screen.

2.  Locate the trainee you wish to terminate. The **Filter table** field can be used to locate someone quickly if desired.



3.  Click the ⋯ **Actions** button and select **Initiate Termination Notice**. The Termination Notice screen is displayed with some fields pre-populated with data from the system.

**NOTE:** The **Initiate TN** menu option will not display if there is an existing WIP appointment for the same Trainee.

## Termination Notice

Ruth L. Kirschstein National Research Service Award

**Details for** 1T23HL456789-38 ...

| Budget Period | Fiscal Year | Project Period | Grant Management Specialist | Program Official |
|---|---|---|---|---|
| 09/01/2022 - 08/31/2023 | 2022 | 05/01/1980 - 08/31/2025 | ✉ Ulam, Joseph | ✉ Rotblat, Stanislaw |

Curie, Marie ...
`Termination` `PRE-DOC`

Total NRSA Support Under This Award   Degree   Routing History

**Termination Date:** *
02/28/2023 📅

**Business Official** *
Select One...

1 Results

| Id | Support Year | Start Date | End Date | Termination Date | Amount of Stipend/Salary | Standard Stipend Amount | Specialty Funding | Number of Months/Days | Status |
|---|---|---|---|---|---|---|---|---|---|
| 1234567 | 38 | 01/01/2023 | 02/28/2023 | 02/28/2023 | $ 4392 * | $26,352 | | 1 Months 28 Days | Accepted |

Totals: $4,392

### 🔖 Other Relevant PHS ⓘ

**Currently participating in NIH Loan Repayment Program**
⬤

**National Health Service Corps Scholarship** *
0
Number of Months

**Kirschstein-NRSA** *
0
Number of Months

**Other Kirschstein-NRSA training awards or fellowships**
0 Results

| Award Number | From | To | Special Funding |
|---|---|---|---|
| No records found | | | |

### 🎛 Training Received ⓘ

**Summary Comments**

Provide a summary of the training, career development, or research education received and the research undertaken during fellowship or appointment period, and describe how it furthered your career. List publications, if any, resulting from the research during this period. List awards and career awards pending and received. If a fellowship or appointment is being terminated early, indicate the reason. Upload any supporting documentation

2000 characters remaining

**Supporting Documentation** (optional)

+ Choose   ✕ Cancel

Only pdf format, 6 MB maximum allowed

### 🪪 Post Award Details

| Activity | Organization | Type of Position |
|---|---|---|
| Select one | Select one | Select one |
| If other, please describe | If other, please describe | If other, please describe |

**Post Award Position**
**Position Title**
Ex: Assistant Professor
**Name Of Organization**
Ex: University of Maryland BC
**City**
Ex: Washington
**State**
Select One

**Post Award Mailing Address**
**Address Line 1**
Ex: 123 Main St.
**City**
Ex: Washington
**State** — Select One   **Zip** — Ex: 12345
**Email**
eRATest@mail.nih.gov

**Take Action**

💾 Save Draft

💾 Save as Draft

Cancel

## Complete the Termination Notice

1. Complete the Termination Notice. Required fields are marked with a red asterisk (*).
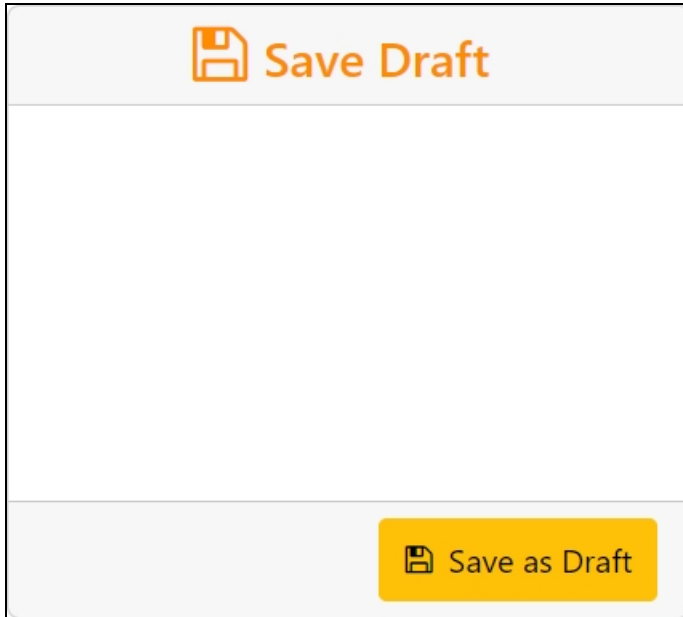
**TIP:** For form completion instructions and the form itself, click http://grants.nih.gov/grants/funding/416/phs416-7.pdf.

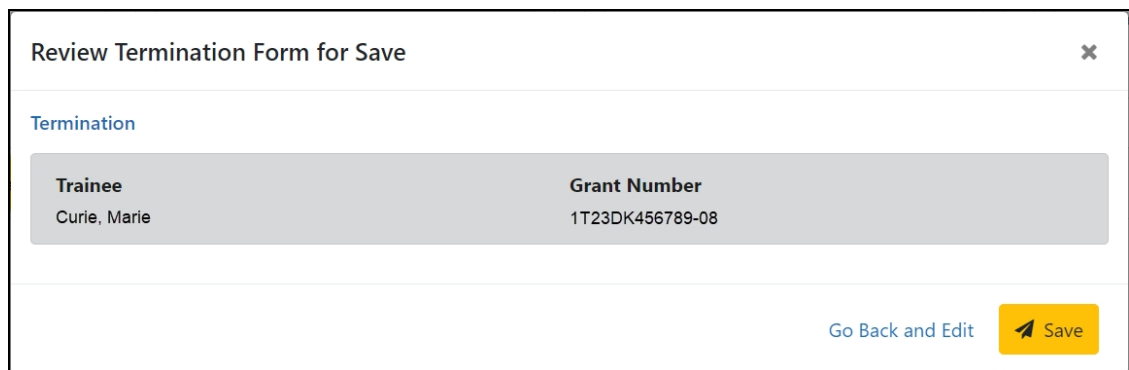Below are some key things to note while completing the form:

1. The Termination Date format is MM/DD/YYYY.

2. No commas or decimals are allowed in the Amount of Stipend/Salary field.

3. All comment text boxes are limited to 2000 characters.

4. Only the business official can submit the Termination Notice to the Agency for NRSA appointments and fellowships. For career development awards (e.g. K12, KL2, and KM1) and research awards (e.g. R25, R90), only the PD/PI can submit the termination notice.

**IMPORTANT:** You must select the name of the business official (BO) who will submit the termination notice to the agency.
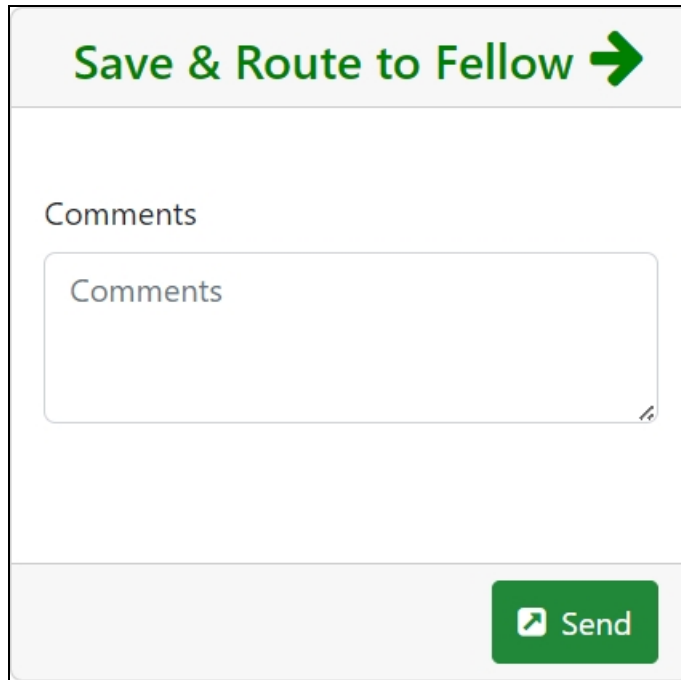
## Save Draft



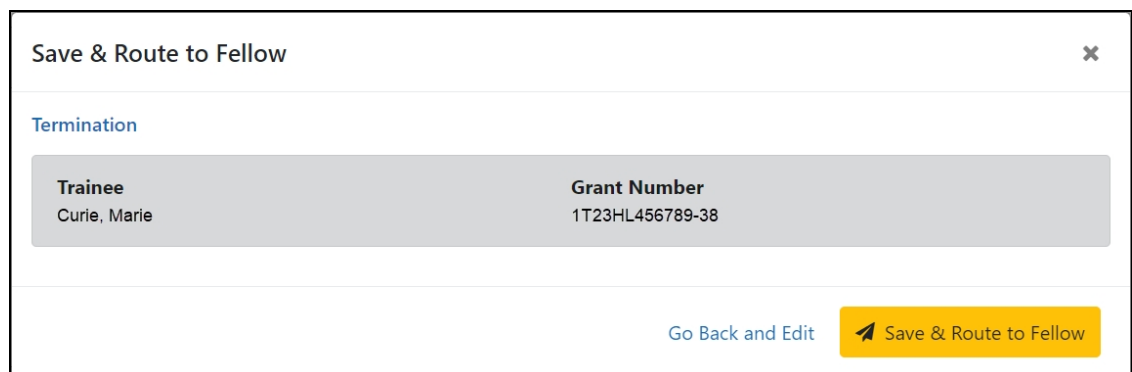1. Click the **Save as Draft** button. A confirmation message displays.



2. Click the **Save** button. Your edits are saved and the form remains in your queue. The draft form is saved and displayed for review; in addition, new options are added to the **Take Action** section.

## Route new termination to trainee



a. Add comments to the **Comments** field if desired.

b. Click the **Send** button. A confirmation message displays.



c. Click the **Save & Route to Trainee** button. The system will check the form prior to routing. Any identified errors must be corrected prior to routing. Warnings may be addressed at your discretion. A confirmation message is displayed at the top of the screen indicating that the Termination

Notice has been successfully routed to the trainee. The status of the termination is changed to **In-Progress Trainee**.

**Termination Notices** ❓

Success! Curie, Marie Termination form for Grant number: 1T23HL456789-38 is routed to trainee on Wed Mar 22 2023 17:29:43 GMT-0400 (Eastern Daylight Time)    ✖

d. The **Routing History** tab in the trainee section contains a list of the actions taken on the termination. The first item in the history reflects the current state of the termination.

CURIE, MARIE  •••
Termination  POST-DOC  In Progress PI

| | Total NRSA Support Under This Award | Degree | Routing History | | | |
|---|---|---|---|---|---|---|

2 Results

| Id | Event | Action Taken By | Action Date | Action Taken | Current Status | Current Reviewer | Comments |
|---|---|---|---|---|---|---|---|
| 1 | Sponsor Routes TN to PI | SKLODOWSKA, SALOMEA | 01/17/2024 2:42 PM | Routed to PI | In Progress PI | CURIE, MARIE | |
| 2 | Sponsor Initiates TN | SKLODOWSKA, SALOMEA | 01/17/2024 2:35 PM | Initiated by Sponsor | In Progress Sponsor | SKLODOWSKA, SALOMEA | |

The status of the termination is changed to **In-Progress Trainee**.

## Process Fellowship Termination Notice by Sponsor

1. Click the hyperlinked trainee name to view the Termination Notices screen.

## Termination Notices ❓

**Details for** 1T23HL456789-38

Pending Appointments 0
Pending Terminations 7

**Budget Period**
09/01/2022 - 08/31/2023

**Awarded PD/PI**
✉ SKLODOWSKA, SALOMEA

**Project Title**
Long-Term Effects of Radium
Exposure on Nearby Inhabitants

**Institution**
UNIVERSITY OF PARIS

Curie, Marie ...
`Termination` `PRE-DOC` `In Progress BO`

Total NRSA Support Under This Award | Degree | Routing History

**Termination Date:** *
02/28/2023 📅

**Business Official:** *
Franklin, Rosalind

1 Results

| Id | Support Year | Start Date | End Date | Termination Date | Amount of Stipend/Salary | Standard Stipend Amount | Specialty Funding | Number of Months/Days | Status |
|----|----|----|----|----|----|----|----|----|----|
| 1234567 | 38 | 01/01/2023 | 02/28/2023 | 02/28/2023 | $ 4392 * | $26,352 | | 1 Months 28 Days | Accepted |

**Totals:** $4,392

### 🔖 Other Relevant PHS ⓘ

**Currently participating in NIH Loan Repayment Program**
⚪

**National Health Service Corps Scholarship** *
0
Number of Months

**Kirschstein-NRSA** *
0
Number of Months

**Other Kirschstein-NRSA training awards or fellowships**
0 Results

| Award Number ⇅ | From ⇅ | To ⇅ | Special Funding |
|----|----|----|----|
| | No records found | | |

### ▦ Training Received ⓘ

**Summary Comments**

Provide a summary of the training, career development, or research education received and the research undertaken during fellowship or appointment period, and describe how it furthered your career. List publications, if any, resulting from the research during this period. List awards and career awards pending and received. If a fellowship or appointment is being terminated early, indicate the reason. (2000 characters maximum)

2000 characters remaining

**Supporting Documentation** (optional)

View Uploaded PDF File 🔗 🗑

### 🪪 Post Award Details

**Activity**
Further Education/Training ✕ ⌄
If other, please describe

**Organization**
Academic ✕ ⌄
If other, please describe

**Type of Position**
Postdoctoral Researcher ✕ ⌄
If other, please describe

**Post Award Position**

Position Title
Ex: Assistant Professor

Name Of Organization
Ex: University of Maryland BC

City
Ex: Washington

State
Select One ⌄

**Post Award Mailing Address**

Address Line 1
123 MAIN STREET

City
Swarthmore

State
PENNSYLVANIA ✕ ⌄

Zip
19081

Email
eratest@nih.gov

### Take Action

**💾 Save Draft**

💾 Save as Draft

**Save & Route to Fellow ➡**

Comments

🗷 Send

**Route to Business Official ➡**

Comments

🗷 Send

Cancel    Delete Termination

2.  Review the form, add comments if desired, then click the **Send** button in the **Route to Agency** card. A confirmation message displays.

---

**Save & Route to BO**                                                        ✕

Termination

| Trainee | Grant Number |
|---|---|
| Curie, Marie | 1T23HL456789-38 |

**I certify that to the best of my knowledge all the above information is correct.**

Go Back and Edit    ◀ Save & Route to BO

---

3.  Click the **Certify and Route to Agency** button. The system will check the form prior to routing. Any identified errors must be corrected prior to routing. Warnings may be addressed at your discretion. A confirmation message is displayed at the top of the screen indicating that the Termination Notice has been successfully routed to the agency. The status of the appointment is changed to **Pending Agency Review**.

---

**Termination Notices** ❓

Success! Curie, Marie Termination form for Grant number: 1T23HL456789-38 is routed to BO on Wed Jan 17 2024 17:28:20 GMT-0500 (Eastern Standard Time)    ✕

---

4.  The **Routing History** tab in the Process Statement of Training Appointment section contains a list of the actions taken on the appointment. The first item in the history reflects the current state of the appointment.

Curie, Marie •••

`Termination` `PRE-DOC` `Pending Agency Review`

Total NRSA Support Under This Award    Degree    **Routing History**

12 Results
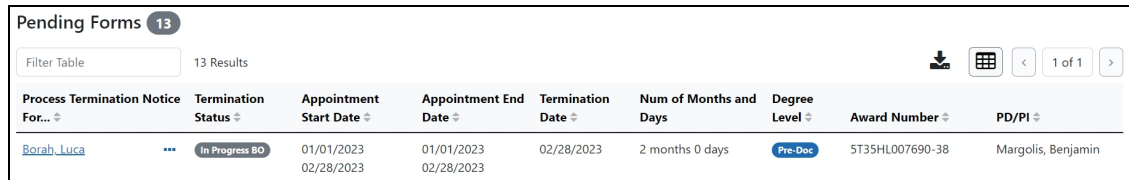
| Id | Event | Action Taken By | Action Date | Action Taken | Current Status | Current Reviewer | Comments |
|----|-------|-----------------|-------------|--------------|----------------|------------------|----------|
| 1 | Sponsor Routes TN to BO | Franklin, Rosalind | 03/22/2023 8:17 PM | Routed to BO | In Progress BO | Ulam, Joseph | |
| 2 | PI Routes TN to Sponsor | Sklodowska, Salomea | 03/22/2023 8:00 PM | Routed to Sponsor | In Progress Sponsor | Franklin, Rosalind | |
| 3 | PI Initiates TN | Curie, Marie | 03/22/2023 6:03 PM | Initiated by PI | In Progress PI | Curie, Marie | |

## Process New Termination Notice by BO

**NOTE:** The Business Official (BO) is the only one who can submit a Termination Notice (TN) to the Agency for final processing and acceptance.

### Process a new termination

1.  In the Pending Forms list on the Business Official Home screen, locate the trainee you wish to terminate. The **Filter table** field can be used to locate someone quickly if desired.



2.  Click the hyperlinked trainee name to view the Termination Notices screen.

# Termination Notices ❓

Details for  1T23HL456789-38

Pending Appointments 0
Pending Terminations 7

**Budget Period**
09/01/2022 - 08/31/2023

**Awarded PD/PI**
✉ SKLODOWSKA, SALOMEA

**Project Title**
Long-Term Effects of Radium
Exposure on Nearby Inhabitants

**Institution**
UNIVERSITY OF PARIS

Curie, Marie •••

`Termination` `PRE-DOC` `In Progress BO`

| Total NRSA Support Under This Award | Degree | Routing History |

**Termination Date:** *
02/28/2023 📅

**Business Official** *
Franklin, Rosalind ▾

1 Results

| Id | Support Year | Start Date | End Date | Termination Date | Amount of Stipend/Salary | Standard Stipend Amount | Specialty Funding | Number of Months/Days | Status |
|---|---|---|---|---|---|---|---|---|---|
| 1234567 | 38 | 01/01/2023 | 02/28/2023 | 02/28/2023 | $ 4392 * | $26,352 | | 1 Months 28 Days | `Accepted` |

**Totals:** $4,392

## 🔖 Other Relevant PHS ⓘ

**Currently participating in NIH Loan Repayment Program**
⚪

**National Health Service Corps Scholarship** *
0
Number of Months

**Kirschstein-NRSA** *
0
Number of Months

**Other Kirschstein-NRSA training awards or fellowships**
0 Results

| Award Number ⇕ | From ⇕ | To ⇕ | Special Funding |
|---|---|---|---|
| | No records found | | |

## ▦ Training Received ⓘ

**Summary Comments**

Provide a summary of the training, career development, or research education received and the research undertaken during fellowship or appointment period, and describe how it furthered your career. List publications, if any, resulting from the research during this period. List awards and career awards pending and received. If a fellowship or appointment is being terminated early, indicate the reason. (2000 characters maximum)

2000 characters remaining

**Supporting Documentation** (optional)

View Uploaded PDF File 📄  🗑

## 🪪 Post Award Details

**Activity**
Further Education/Training ✖ ▾
**If other, please describe**

**Organization**
Academic ✖ ▾
**If other, please describe**

**Type of Position**
Postdoctoral Researcher ✖ ▾
**If other, please describe**

### Post Award Position

**Position Title**
Ex: Assistant Professor

**Name Of Organization**
Ex: University of Maryland BC

**City**
Ex: Washington

**State**
Select One ▾

### Post Award Mailing Address

**Address Line 1**
123 MAIN STREET

**City**
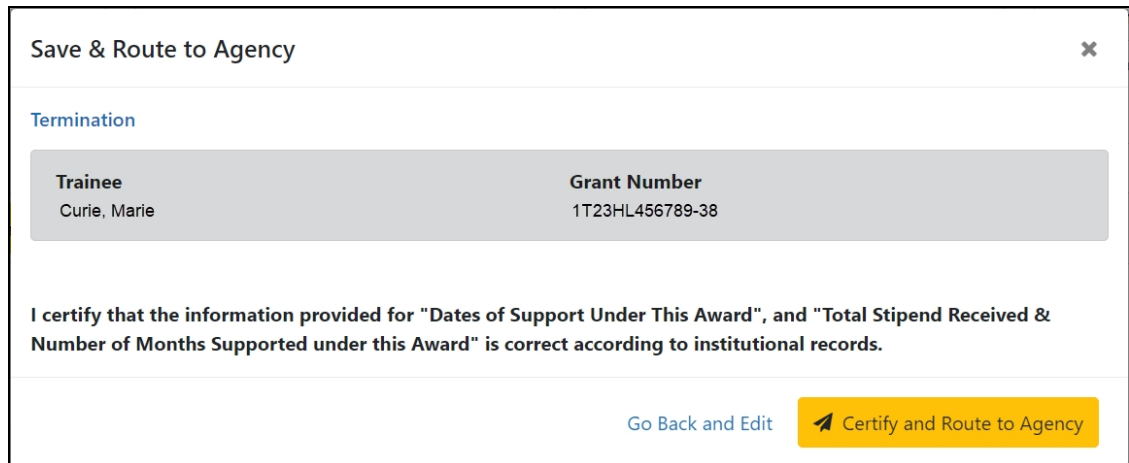Swarthmore

**State**
PENNSYLVANIA ✖ ▾

**Zip**
19081

**Email**
eratest@nih.gov

## Take Action

| 💾 Save Draft | Save & Route to Trainee ➡ | Save & Route to PI ➡ | Route to Agency ➡ |
|---|---|---|---|
| | Comments | Comments | Comments |
| | | | |
| 💾 Save as Draft | 📨 Send | 📨 Send | 📨 Submit |

Cancel   Delete Termination

3.  Review the form, add comments if desired, then click the **Submit** button in the **Route to Agency** card. A confirmation message displays.
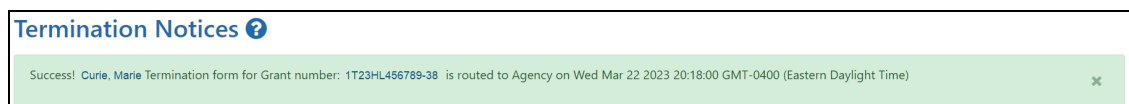


4.  Click the **Certify and Route to Agency** button. The system will check the form prior to routing. Any identified errors must be corrected prior to routing. Warnings may be addressed at your discretion. A confirmation message is displayed at the top of the screen indicating that the Termination Notice has been successfully routed to the agency. The status of the appointment is changed to **Pending Agency Review**.



5.  The **Routing History** tab in the Process Statement of Training Appointment section contains a list of the actions taken on the appointment. The first item in the history reflects the current state of the appointment.

Curie, Marie •••

`Termination` `PRE-DOC` `Pending Agency Review`

Total NRSA Support Under This Award    Degree    **Routing History**

12 Results

| Id | Event | Action Taken By | Action Date | Action Taken | Current Status | Current Reviewer | Comments |
|----|-------|----------------|-------------|--------------|----------------|------------------|----------|
| 1 | BO Submits TN to Agency | Franklin, Rosalind | 03/22/2023 8:17 PM | Submitted to Agency | Pending Agency Review | AGENCY | |
| 2 | PI Routes TN to BO | Sklodowska, Salomea | 03/22/2023 8:00 PM | Routed to BO | In Progress BO | Franklin, Rosalind | |
| 3 | Trainee Routes TN to PI | Curie, Marie | 03/22/2023 6:03 PM | Routed to PI | In Progress PI | Sklodowska, Salomea | |
| 4 | PI Routes TN to Trainee | Sklodowska, Salomea | 03/22/2023 5:29 PM | Routed to Trainee | In Progress Trainee | Curie, Marie | |
| 5 | PI Initiates TN | Sklodowska, Salomea | 03/22/2023 5:25 PM | Initiated by PI | In Progress PI | Sklodowska, Salomea | |