



# xTrain for Institution Staff User Guide

June 2, 2025

---

**NOTE:** This user guide is an identical PDF version of the online help.

---

## Contact Us

**Additional Help Needed?** Please contact the eRA Service Desk (<https://www.era.nih.gov/need-help>).

**Toll-free:** 1-866-504-9552; **Phone:** 301-402-7469

**Hours:** Mon-Fri, 7:00 a.m. to 8:00 p.m. Eastern Time

**Feedback on the user guide?** Please email the eRA Communications Office ([era-communications@mail.nih.gov](mailto:era-communications@mail.nih.gov)).

## Disclaimer STATEMENT

No data shown in illustrations represents any real account, project, or individual. Any resemblance to actual accounts, projects, or individuals is purely coincidental.

# Table of Contents

<b>Table of Contents</b>	<b>3</b>
<b>Latest Updates</b>	<b>1</b>
<b>Purpose</b>	<b>2</b>
Scope	2
<b>What is xTrain?</b>	<b>3</b>
xTrain Forms Supported	3
xTrain External User Roles	4
508 Compliance	5
<b>Key xTrain Screens</b>	<b>6</b>
Awarded Grants and Sponsored Grants	6
Using the Quick Filter toggles	7
Using the Filter Table field	7
Viewing a Training Roster	7
Creating a Service Desk Ticket	8
Viewing a Grant	9
Trainee Roster Screen	9
Grant Details section	10
Creating new appointment forms and termination notices	11

Trainee Roster section .....	13
Trainee Roster Fields .....	14
Grant Details Screen .....	15
Grant Details section .....	16
Trainee Roster section .....	17
Appointment Form Screen .....	18
Grant Details section .....	19
Process Statement of Training Appointment section .....	20
Take Action section .....	21
Save Draft .....	21
Save & Route to Trainee .....	22
Save & Route to PI .....	23
Route to Agency .....	24
Termination Notice Screen .....	25
Grant Details section .....	27
Person Details section .....	27
Post Award Details section .....	27
Take Action section .....	27
Save Draft .....	27
Save & Route to Trainee .....	28



Save & Route to PI .....	29
Route to Business Official .....	30
Route to Agency .....	31
Business Official/Signing Official Home Screen .....	32
Using the Pending Termination Notices and Pending Appointment Forms cards	33
Using the Awarded Grants card .....	36
Using the Pending Forms table .....	38
Using the In Progress Termination Notices and In Progress Appointment Forms tables .....	39
Appointment and Termination Statuses .....	39
Appointment Statuses .....	39
Termination Statuses .....	40
<b>Accessing xTrain</b> .....	<b>41</b>
Accessing xTrain as a Delegate .....	42
Accessing xTrain with Multiple Institutional Affiliations .....	43
PD/PI Home Screen - Awarded Grants .....	45
Using the Quick Filter toggles .....	45
Using the Filter Table field .....	45
Viewing a Training Roster .....	46
Creating a Service Desk Ticket .....	46

Viewing a Grant .....	47
Accessing xTrain as a Trainee .....	47
My Profile Details section .....	48
My Forms section .....	48
Business Official/Signing Official Home Screen .....	49
Using the Pending Termination Notices and Pending Appointment Forms cards	50
Using the Awarded Grants card .....	52
Using the Pending Forms table .....	54
Using the In Progress Termination Notices and In Progress Appointment Forms tables .....	55
<b>Appointments .....</b>	<b>56</b>
Create New Appointment by PD/PI .....	57
Create a new appointment .....	57
Route new appointment to trainee .....	61
Trainee processes form .....	63
Complete the appointment .....	63
Delete an in-progress appointment .....	67
Process New Appointment by Trainee .....	67
Save Draft .....	69
Save & Route to PI .....	70

Create an Amendment .....	72
Create an Amendment .....	73
Save Draft .....	75
Initiate a Reappointment by PD/PI .....	76
Save Draft .....	78
<b>Terminating Institutional Research Training Programs .....</b>	<b>80</b>
Who Can Initiate/Submit Termination Notices .....	81
Initiate a New Termination by PD/PI .....	82
Initiate a new termination .....	82
Complete the Termination Notice .....	84
Save Draft .....	85
Route new termination to trainee .....	86
Trainee processes form .....	87
Complete the termination .....	87
Delete an in-progress termination .....	91
Process Termination Notice by Trainee .....	92
Open the Termination Notice .....	92
Complete the Termination Notice .....	95
Save Draft .....	95
Save & Route to PI .....	96

Recall .....	98
Process New Termination Notice by BO .....	99
Process a new termination .....	100
Reassign a Termination Notice to yourself .....	103
Early Terminations .....	104
Initiate an early termination .....	104
Save Draft .....	106
Terminating Fellowships .....	108
Initiate a New Fellowship Termination .....	109
Initiate a new termination .....	110
Complete the Termination Notice .....	112
Save Draft .....	113
Route new termination for processing .....	113
Process Fellowship Termination Notice by Sponsor .....	117
Process New Termination Notice by BO .....	120
Process a new termination .....	120
<b>Personal Profile .....</b>	<b>124</b>
Personal Profile Fields Checked by xTrain .....	124
Disadvantaged Background .....	124
* List of Degrees .....	125

---

<b>Appendix A – Statement of Appointment (Form PHS 2271)</b>	<b>127</b>
<b>Appendix B – Termination Notice (Form 416-7)</b>	<b>128</b>
<b>Appendix C – Payback Agreement (Form PHS 6031)</b>	<b>129</b>
<b>Appendix D – Appointment Errors/Warnings</b>	<b>130</b>

## Latest Updates

### **March 22, 2024**

The *Process New Termination Notice by BO* on page 99 topic was updated with instructions on reassigning a termination notice to yourself.

### **March 11, 2024**

The *Create New Appointment by PD/PI* on page 57 topic was updated with instructions on deleting in-progress appointments.

The *Initiate a New Termination by PD/PI* on page 82 topic was updated with instructions on deleting in-progress terminations.

### **March 4, 2024**

The *Trainee Report* topic was updated to indicate that only SOs, PD/PIs, and SO delegates can submit a Trainee Report.

### **March 30, 2023**

The online help has been updated to reflect the redesigned xTrain.

## Purpose

The purpose of this document is to provide guidance on the use of xTrain to Institutional (external) users. For more information regarding research training and research career opportunities offered by the National Institutes of Health (NIH), please visit the Office of Extramural Research (OER) Grants Training page at <http://grants.nih.gov/training/index.htm>.

## Scope

This document indicates how to access xTrain, provides a description of xTrain user roles, and explains the process for submitting appointments, re-appointments, amendments and termination notices. This xTrain External User Guide, as well as additional reference material, is available on the xTrain resources page: <https://www.era.nih.gov/help-tutorials/xtrain>.

## What is xTrain?

xTrain provides program directors/principal investigators, university administrators, and trainees the ability to electronically prepare and submit PHS 2271 Statement of Appointment forms and PHS 416-7 Termination Notices associated with institutional research training programs, institutional career development awards, individual fellowships and research education awards. xTrain is also used by agency grants management staff to review and process the appointments and termination notices submitted electronically.

Grantee institution staff can use xTrain to:

- Create, route, and submit Appointments, Re-appointments, Amendments, and Termination Notices
- Track the status and timing of actions taken by xTrain users

xTrain eliminates the need for signed paper forms, except in the following situations:

Permanent U.S. residents must submit a signed and notarized statement certifying that they have (1) a Permanent Resident Card (USCIS Form I-551), or (2) other legal verification of such status

Signed hard copies of Payback Service Agreements are required for postdoctoral trainees in their first year of Kirschstein-NRSA support. For more information on the Payback Service Agreement policy, please refer to this web site. [https://grants.nih.gov/grants/policy/nihgps/HTML5/section\\_11/11.3.13\\_reporting\\_requirements.htm#Payback](https://grants.nih.gov/grants/policy/nihgps/HTML5/section_11/11.3.13_reporting_requirements.htm#Payback)

## xTrain Forms Supported

xTrain supports electronic submission of the following forms:

- Statement of Appointment Form (PHS 2271)
- Termination Notice (PHS 416-7)
- Payback Agreement (PHS 6031)—This agreement is available for download/printing with instructions for signing and submitting the agreement via postal mail. xTrain will populate the basic information prior to printing



Form-specific information and instructions can be found at <http://grants.nih.gov/grants/forms.htm>.

## xTrain External User Roles

External User Role	Description
BO (Business Official)	A Business Official has signature or other authority related to administering grantee institution training grants.
SO (Signing Official)	A grantee institution's Signing Official has authority to legally bind a grantee institution for grant matters.
PD/PI (Program Director/Principal Investigator)	<p>The Program Director or Principal Investigator is responsible for the overall direction of the training program and has the skills, knowledge and resources necessary to organize and implement a high quality research training program. In Commons, this role is called the PI role but is used for PDs as well. The Fellow also has the PI role. The PD/PI selects and appoints Trainees, amends appointments (when necessary), and initiates Termination Notices.</p> <p>A multi-PI can perform the same actions as the Contact PI</p>
PD/PI Delegate (ASST)	An ASST user is a grantee institution individual that is delegated authority to perform Program Director/Principal Investigator xTrain training appointment functions. A user with the ASST role cannot submit appointments.
Trainee	<p>Trainee: A person appointed to and supported by an institutional Kirschstein-NRSA or non-NRSA research training award</p> <p>Scholar: A person appointed to and supported by an insti-</p>

External User Role	Description
	tutional career development award  Participant: A person appointed to and supported by a research education award.
Sponsor	The Sponsor is a person who mentors Fellows and can initiate and facilitate the termination of a fellowship. The Sponsor can submit the Termination Notice for foreign and federal fellowships only.
Sponsor Delegate	Users with this authority are able to perform actions similar to the Sponsor role but they are not able to submit the fellowship Termination Notice to the Agency.

#### External User Roles

---

**NOTE:** The Signing Official (SO), Administrative Official (AO) and Accounts Administrator (AA) can grant Business Official (BO), Principal Investigator (PI) or Assistant (ASST) roles to individuals within the grantee institution. Signing Officials can also give Business Official privileges to themselves. Trainees without eRA accounts will be invited to register as part of the xTrain appointment process.

---

For more information on xTrain external user roles and the actions they can take, see the eRA Commons Roles list at [http://era.nih.gov/files/eRA\\_Commons\\_Roles.pdf](http://era.nih.gov/files/eRA_Commons_Roles.pdf)

## 508 Compliance

The xTrain module meets the compliance regulations of section 508. The standard makes products accessible to people with disabilities, including those with vision, hearing, and mobility impairments.

## Key xTrain Screens

The following are the key xTrain screens through which xTrain processing (i.e. Account Creation, Appointments, Terminations, etc.) is initiated:

- [Awarded/Sponsored Grants](#)
- [Trainee Roster](#)
- [Appointment Form](#)
- [Termination Notice](#)
- [Business Official/Signing Official Home](#)

## Awarded Grants and Sponsored Grants

There are two types of grant lists available within xTrain:

- The Awarded Grants list displays all training grants for which the user is listed as the PD/PI.
- The Sponsored Grants list displays all training grants for which the user is listed as the Sponsor.

Both lists contain the same elements and function similarly.

**Awarded Grants** ?

Quick Filters: Grant Status: Active ☒ Closed ☐ Activity Types: T ☒ R ☒ K ☒ F ☒

Filter Table 2 Results

Number	Project Start Date	Project End Date	Project Title	Special Funding
<a href="#">R12 ES 345678</a>	09/01/2021	08/31/2026	Long-Term Effects of Radium Exposure on Nearby Inhabitants	
<a href="#">T34 ES 567890</a>	07/01/1979	06/30/2025	X-Ray Crystallography and the Molecular Structure of DNA	

Figure 1:

**Sponsored Grants** ?

Filter Table 2 Results

Number	Project Start Date	Project End Date	PD/PI	Project Title	Special Funding
T32 DK 345678	04/05/1998		Curie, Marie	Long-Term Effects of Radium Exposure on Nearby Inhabitants	
T32 GM 876543	04/01/2007	03/31/2009	Franklin, Rosalind	X-Ray Crystallography and the Molecular Structure of DNA	

## Using the Quick Filter toggles

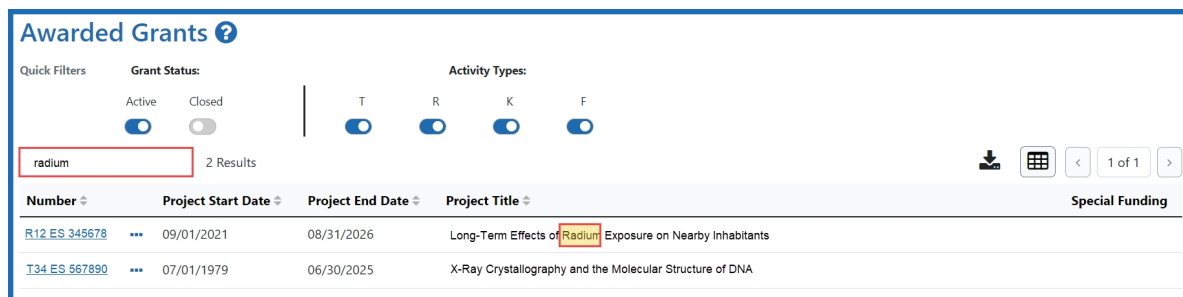
The toggles allow you to filter grants by grant status and activity type. Blue indicates that you are filtering for that option; gray indicates that you are filtering out that option.



For example, the toggles in the image above will filter for active training grants.


## Using the Filter Table field



The **Filter Table** field allows you to filter the table by any field containing text. The search criteria include Number, Project Start Date, Project End Date, Project Title, and Special Funding.



The table is filtered as you type in the **Filter Table** field. Matches are highlighted in yellow.

## Viewing a Training Roster

Click the  **Actions** button to view grant options, then select **Training Roster**.


Number ▾		Project Start Date ▾	Proj
<a href="#">R12 ES 345678</a>	...	09/01/2021	08/3
<a href="#">T34 ES 567890</a>	<div><div> Training Roster</div><div> Create Service Desk Ticket</div></div>		

-or-

Click a hyperlinked **Grant Number**.

The Trainee Roster screen is displayed.

## Creating a Service Desk Ticket

Click the  **Actions** button to view grant options, then select **Create Service Desk Ticket** to create a service desk ticket prepopulated with grant information. Complete the ticket, then click the **Submit Ticket** button to send it to the service desk.

Create Service Desk Ticket

\* Required Fields

Grant Number

R12 ES 345678

Appl ID

1234567

Institution

UNIVERSITY OF PARIS

PD/PI Name

Curie, Marie

Submitter Email \*

Subject \*

Issue Description \*

Close

Submit Ticket

## Viewing a Grant

Click any hyperlinked **Grant Number** to view the *Trainee Roster* screen. For more information, refer to the *Trainee Roster Screen* on page 9 topic.

## Trainee Roster Screen

xTrain provides read-only access to the cumulative grant data such as pre-doc, post-doc, and short term slots awarded and accepted within a given overall grant, for each supporting year of the grant.

1. To view the Trainee Roster screen, select the appropriate Grant Number link in the Awarded Grants screen.

The Trainee Roster screen consists of two sections: grant details and the trainee roster.

**Trainee Roster ?** Jump to Roster Table

**Details for T12ES345678**

**Project Period**  
07/01/1979 - 06/30/2025  
**Grant Management Specialist**  
✉ [Skłodowska\\_Salomea](#)

**Current PD/PI**  
✉ [CURIE, MARIE](#)  
**Program Official**  
✉ [Ulam, Joseph](#)

**Project Title**  
Long-Term Effects of Radium Exposure on Nearby Inhabitants  
**Institution**  
UNIVERSITY OF PARIS

**Select Grants to Display** Years With Pending Forms

**5T12ES345678-38**

**Budget Period:** 07/01/2021 - 06/30/2022

**In Progress**

Appointments **0** Terminations **1**

[+ Start New](#)

**Pre-Doc Months** Remaining: 0

Awarded 72  
Accepted 72

**Post-Doc Months** Remaining: 0

Awarded 36  
Accepted 36

**Short Term Months** Remaining: 0

Awarded 0  
Accepted 0

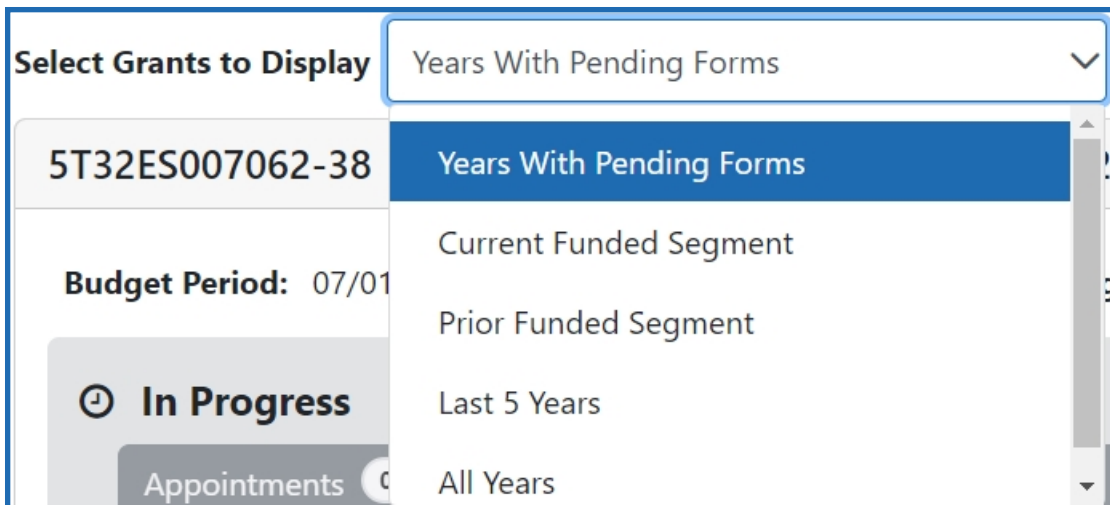
[See Slots](#)


Filter Table 18 Results

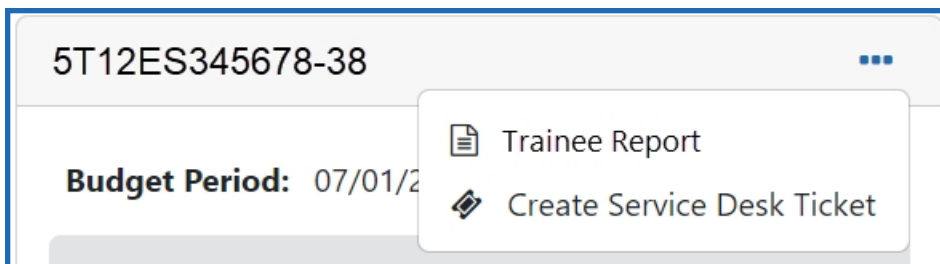
Trainee Name	Appointment Status	Termination Status	Appt Type	Appt Start	Appt End	Termination Date	Num of Months And Days	Degree Level
<b>5T32ES007062-38</b>								
Franklin, Rosalind	***	✓	Reappt.	09/01/2021	08/31/2022	08/31/2022	12 months 0 days	Pre-Doc
Crick, Francis	***	✓	New	09/01/2021	08/31/2022		12 months 0 days	Pre-Doc

## Grant Details section

1. Click the **Jump to Roster Table** button in the upper-right corner of the screen to scroll down to the pending trainee roster(s) for the grant.
2. To email the Grant Management Specialist, Current PD/PI, or Program Official, click the hyperlinked name in the grant details section at the top of the screen.
3. By default, details for years with pending forms are displayed. Use the **Select Grants to Display** drop-down to select another time frame.



4. Click the  **Actions** button to view grant actions.



5. Select **Trainee Report** to open the report in a new tab. Refer to the *Trainee Report* topic for more information.
6. Select **Create Service Desk Ticket** to create a service desk ticket prepopulated with grant information. Complete the ticket, then click the Submit Ticket button to send it to the service desk.

## Creating new appointment forms and termination notices

When Years With Pending Forms is selected, in progress budget periods are displayed. Use the Start New link to create a new appointment. For more information, refer to the *Create New Appointment by PD/PI on page 57* topic.



Select Grants to Display

Years With Pending Forms

1T23HL456789-38

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

🕒 In Progress

Appointments 0

Terminations 6

+ [Start New](#)

Pre-Doc Months Overage: 48

Awarded 0

Accepted 48

Post-Doc Months Remaining: 0

Awarded 0

Accepted 0

Short Term Months Remaining: 0


Awarded 96

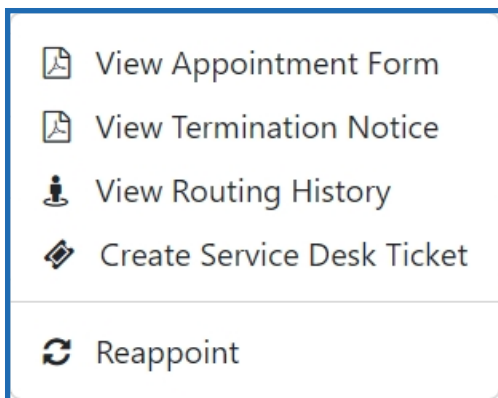
Accepted 0

See Slots

## Trainee Roster section

The Trainee Roster contains details about the trainees appointed to the grant, their status, appointment type, and degree level. For more information about the information in the fields, refer to the *Trainee Roster Fields* on page 14 topic.

1. The **Filter Table** field allows you to filter the table by any field containing text. The Search criteria include Trainee Name, Appointment Status, Termination Status, Appt. Type, Appt. Start, Appt End, Termination Date, Num of Months And Days, and Degree Level.
2. Hyperlinked trainee names indicate that there is a pending action, such as an appointment form or termination notice, for that trainee. Click the hyperlinked name to view the pending form and take action.
3. Each trainee listed has an **Actions** button that allows you to view their details and history with the grant. Click the  **Actions** button to view the available information about the trainee.



- a. **View Appointment Form** downloads a PDF of the form to the browser's default location.
- b. **View Termination Notice** downloads a PDF of the notice to the browser's default location.
- c. **View Routing History** displays a history of the administrative actions taken on the trainee for the grant.

- d. **Create Service Desk Ticket** initiates a service desk ticket prepopulated with grant and trainee information. Complete the ticket, then click the **Submit Ticket** button to send it to the service desk.
- e. **Reappoint** opens the Appointment Form screen with the grant and trainee details prepopulated. For more detail, refer to the *Initiate a Reappointment by PD/PI* on page 76 topic.

## Trainee Roster Fields

The following are the possible options that might appear in some of the columns in the Trainee Roster.

Trainee Name	Appointment Status	Termination Status	Appt Type	Appt Start	Appt End	Termination Date	Num of Months And Days	Degree Level
5T12ES345678-38								
Franklin, Rosalind	...	✓	Reappt.	09/01/2021	08/31/2022	08/31/2022	12 months 0 days	Pre-Doc
Crick, Francis	...	✓	New	09/01/2021	08/31/2022		12 months 0 days	Pre-Doc

Figure 2: Trainee Roster Fields

### Appointment Type:

- *New* – The appointment is the first for the trainee on this grant (will also indicate “New” if the original appointment was submitted on paper)
- *Re-appointment*--The trainee has had a previous appointment on this grant.
- *Amendment*--The original appointment has changed, and this is the newest version.

**Months,Days Appointed**--Contains the duration of the appointment.

**Appointment Status:** Clicking on the hyperlink will display the appointment routing history.

- *Pending Agency Review* --The appointment has been submitted to the agency.
- *On Hold by Agency* - The appointment has been submitted and the agency reviewer has put it on hold.
- *On Hold by Agency – Awaiting Paper Signature* --The appointment has been submitted and the agency reviewer has put it on hold while waiting for the Payback Agreement and/or the documentation for a permanent resident.

- *In Progress PI*-- The PD/PI or the assistant is working on the appointment.
- *In Progress Trainee* – The trainee is working on the appointment.
- *In Progress BO* – The trainee is working on the appointment.
- *Accepted* –The agency reviewer has accepted the appointment.
- *Terminated*—The appointment or fellowship has been terminated.

### **Termination Status:**

- *In Progress BO*--The Business Official is working on the termination notice.
- *In Progress PI*-- The PD/PI (includes fellows) or an assistant is working on the termination notice.
- *In Progress Trainee*--The Trainee is working on the termination notice.
- *Pending Agency Review*-- The termination notice has been submitted to the Agency
- *On Hold by Agency*- The Agency has reviewed the termination notice, but has not yet accepted it.
- *On Hold by Agency – Awaiting Award Revision* –An early termination notice has been submitted for a fellowship and it has been placed on hold until the award can be revised
- *Accepted*—The Agency has accepted the termination notice. When the termination status is "Accepted," the appointment status is "Terminated."

## **Grant Details Screen**

xTrain provides read-only access to the cumulative grant data such as pre-doc, post-doc, and short term slots awarded and accepted within a given overall grant, for each supporting year of the grant.

1. To view the Grant Details screen, select the appropriate Grant Number link in the Awarded Grants screen.

The Grant Details screen consists of two sections: grant details and the trainee roster.

Jump to Roster Table

### Details for T12ES345678

**Project Period**  
07/01/1979 - 06/30/2025

**Grant Management Specialist**  
✉ [Skłodowska\\_Salomea](#)

**Current PD/PI**  
✉ [CURIE, MARIE](#)

**Program Official**  
✉ [Ulam, Joseph](#)

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

**Institution**  
UNIVERSITY OF PARIS

Select Grants to Display: Current Funded Segment

2T32AR007080-44

Budget Period: 07/01/2023 - 06/30/2024

**In Progress**

Appointments: 0 | Terminations: 0

**Pre-Doc Months** Remaining: 0

Awarded: 0  
Accepted: 0

**Post-Doc Months** Remaining: 48

Awarded: 48  
Accepted: 0

**Short Term Months** Remaining: 0

Awarded: 0  
Accepted: 0

[See Slots](#)

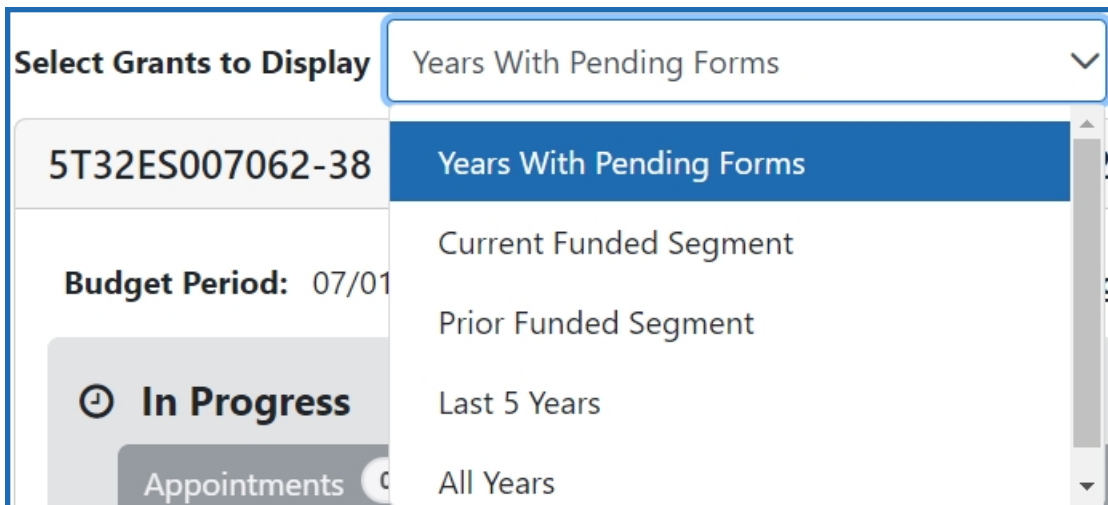
### Trainee Roster ?


Filter Table 18 Results

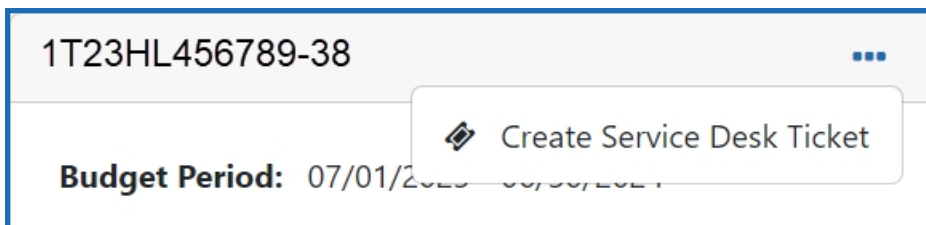
Trainee Name	Appointment Status	Termination Status	Appt Type	Appt Start	Appt End	Termination Date	Num of Months And Days	Degree Level
5T32ES007062-38								
Franklin, Rosalind	***	✓	Reappt.	09/01/2021	08/31/2022	08/31/2022	12 months 0 days	Pre-Doc
Crick, Francis	***	✓	New	09/01/2021	08/31/2022		12 months 0 days	Pre-Doc

## Grant Details section

1. Click the **Jump to Roster Table** button in the upper-left corner of the screen to scroll down to the pending trainee roster(s) for the grant.
2. To email the Grant Management Specialist, Current PD/PI, or Program Official, click the hyperlinked name in the grant details section at the top of the screen.
3. By default, details for the Current Funded Segment are displayed. Use the **Select Grants to Display** drop-down to select another time frame.



4. Click the  **Actions** button to view grant actions.




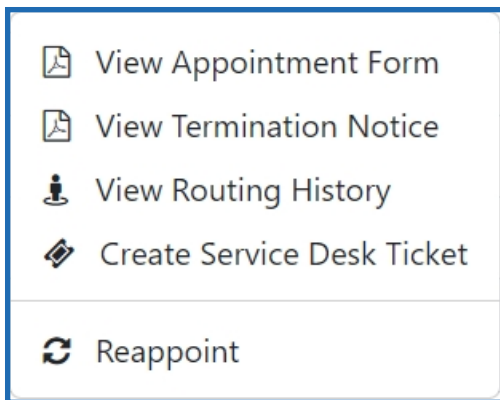
5. Select **Create Service Desk Ticket** to create a service desk ticket prepopulated with grant information. Complete the ticket, then click the **Submit Ticket** button to send it to the service desk.

## Trainee Roster section

The Trainee Roster contains details about the trainees appointed to the grant, their status, appointment type, and degree level. For more information about the information in the fields, refer to the *Trainee Roster Fields* on page 14 topic.

1. The **Filter Table** field allows you to filter the table by any field containing text. The Search criteria include Trainee Name, Appointment Status, Termination Status, Appt. Type, Appt. Start, Appt End, Termination Date, Num of Months And Days, and Degree Level.

2. Hyperlinked trainee names indicate that there is a pending action, such as an appointment form or termination notice, for that trainee. Click the hyperlinked name to view the pending form and take action.
3. Each trainee listed has an **Actions** button that allows you to view their details and history with the grant. Click the  **Actions** button to view the available information about the trainee.



- a. **View Appointment Form** downloads a PDF of the form to the browser's default location.
- b. **View Termination Notice** downloads a PDF of the notice to the browser's default location.
- c. **View Routing History** displays a history of the administrative actions taken on the trainee for the grant.
- d. **Create Service Desk Ticket** initiates a service desk ticket prepopulated with grant and trainee information. Complete the ticket, then click the **Submit Ticket** button to send it to the service desk.
- e. **Reappoint** opens the Appointment Form screen with the grant and trainee details prepopulated. For more detail, refer to the *Initiate a Reappointment by PD/PI* on page 76 topic.

## Appointment Form Screen

The Appointment Form screen consists of two sections: Grant Details and Process Statement of Training Appointment.

### Appointment Form ?

Details for 1T23HL456789-38 ...

<b>Budget Period</b> 09/01/2022 - 08/31/2023	<b>Fiscal Year</b> 2022	<b>Project Period</b> 05/01/1980 - 08/31/2025	<b>Grant Management Specialist</b> ✉ <a href="#">Rotblat, Stanislaw</a>	<b>Program Official</b> ✉ <a href="#">Ulam, Joseph</a>
---	----------------------------	--	--	---

Process Statement of Training Appointment

Curie, Marie ...

Prior NRSA Support    Routing History

1 Results

Award #	PD/PI	Appointment Start Date	Appointment End Date	Termination Date	Stipend/Salary Amt	Degree Level	Status
ST35HL007690-38	SKLODOWSKA, SALOMEA	01/01/2023	02/28/2023	02/28/2023	\$4,392	PRE-DOC	Accepted Appointment

**Period of Appointment**

**From:** 01/01/2023

**To:** 02/28/2023

**Duration:**  
Months: 2 and Days: 0

**Support for Period of Appointment**

**Stipend Level or Salary \***  
PRE ALL - 26,352 PRE-DOC

**Stipend/Salary/Other Compensation \***  
\$4,392

**Degree(s): Earned/In Progress**

2 Results


Degrees(s)	Completion Date	Major/Minor
BA	✓ 06/2018	Neuroscience
MD	★ 05/2024	N/A

**Trainee Background**

<b>Field of Research Trainings or Career Development Code *</b> ---Health Sciences, General (298)	<b>Education Level *</b> Graduate Student	<b>Name of Specialty Boards</b> Begin typing and choose one	<b>Dual Degree *</b> No
--	--	--	----------------------------

## Grant Details section

This section contains information about the grant.

1. Click the  **Actions** button for the grant number and select **Additional Grant Details** to view more information.
2. Click the **Close** button to return to the Appointment Form screen.



The 'Additional Grant Details' modal window displays the following information:

Project Title	Institution
Long-Term Effects of Radium Exposure on Nearby Inhabitants	University of Paris


Current PD/PI	Awarded PD/PI
✉ <a href="#">CURIE, MARIE</a>	✉ <a href="#">CURIE, MARIE</a>

A 'Close' button is located at the bottom right of the modal.

3. Click the hyperlinked names to send email to the Grant Management Specialist and Program Official.

## Process Statement of Training Appointment section

This section provides details of the appointment.

1. Click the  **Actions** button for the trainee and select an option:
  - a. **Additional Trainee Details** displays more information about the trainee.

The 'Additional Trainee Details' modal window displays the following information:

Orcid iD	Commons ID	Persons ID
0000-0001-2345-6789	CURIEMARIE	12345678

Address	Email	Phone
<input type="text"/>	eRATest@mail.nih.gov	<input type="text"/>
<input type="text"/>		
<input type="text"/>		
<input type="text"/>		

Fax
<input type="text"/>

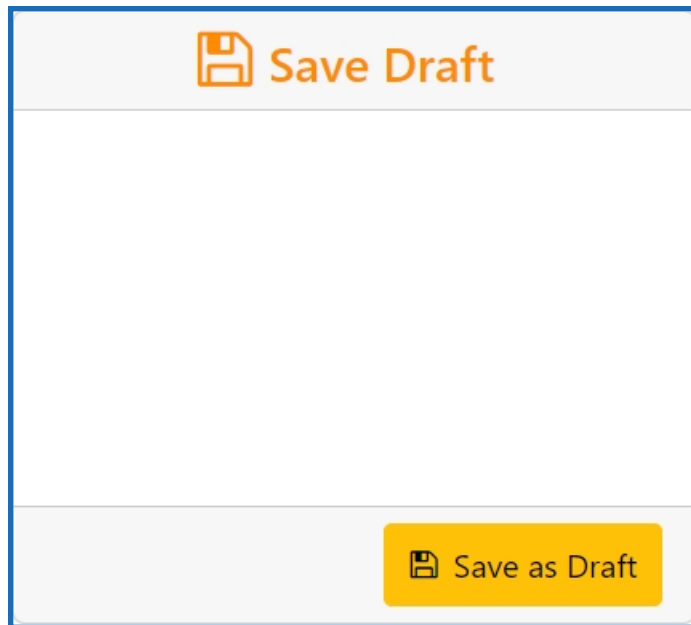
A 'Close' button is located at the bottom right of the modal.

- b. **Create Service Desk Ticket** to create a service desk ticket prepopulated with grant and trainee information. Complete the ticket, then click the **Submit Ticket** button to send it to the service desk.

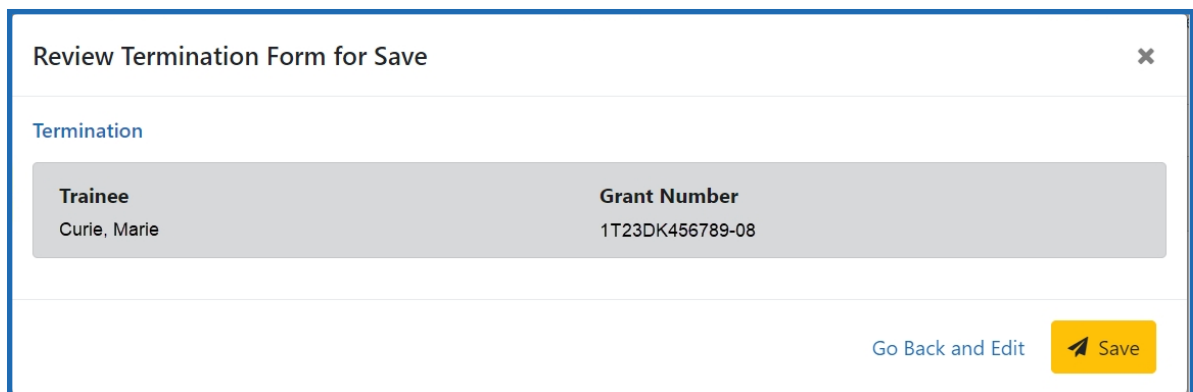
## Take Action section

This section contains options to edit the notice and route it onward for processing.

### Save Draft

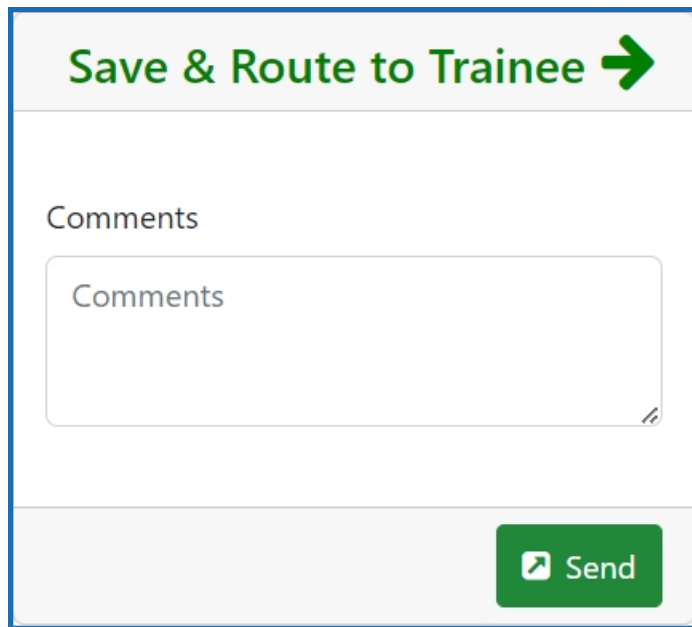
A screenshot of a web interface showing a 'Save Draft' button. The button is yellow with a black floppy disk icon and the text 'Save as Draft'. It is located at the bottom right of a form area. Above the button, there is a header bar with a floppy disk icon and the text 'Save Draft' in orange.

1. Make the appropriate edits to the form.
2. Click the **Save as Draft** button. A confirmation message displays.

A screenshot of a 'Review Termination Form for Save' dialog box. The dialog has a title bar with a close button (X). Below the title bar, there is a section titled 'Termination' in blue. Inside this section, there is a table with two columns: 'Trainee' and 'Grant Number'. The 'Trainee' column contains the text 'Curie, Marie' and the 'Grant Number' column contains the text '1T23DK456789-08'. At the bottom right of the dialog, there are two buttons: 'Go Back and Edit' in blue text and a yellow 'Save' button with a black floppy disk icon.

3. Click the **Save** button. Your edits are saved and the form remains in your queue.


## Save & Route to Trainee



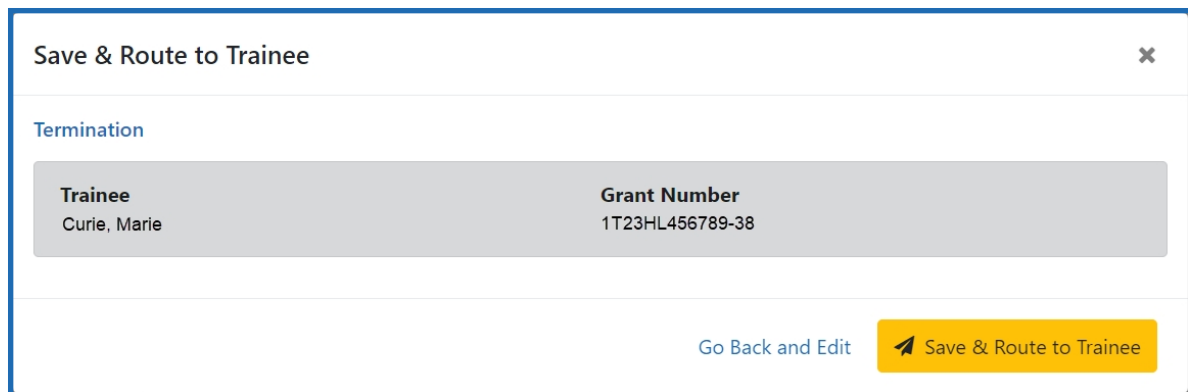
**Save & Route to Trainee** ➔

Comments

Comments

 **Send**


1. Add comments to the **Comments** field if desired.
2. Click the **Send** button. A confirmation message displays.



**Save & Route to Trainee** ✕

Termination

Trainee	Grant Number
Curie, Marie	1T23HL456789-38

[Go Back and Edit](#)  **Save & Route to Trainee**


3. Click the **Save & Route to Trainee** button.

## Save & Route to PI

### Save & Route to PI →

Comments

Comments

 Send

1. Make the appropriate edits to the form.
2. Add comments to the **Comments** field if desired.
3. Click the **Send** button. A confirmation message displays.


Save & Route to PI

Termination

<b>Trainee</b> Curie, Marie	<b>Grant Number</b> 1T23HL456789-38
--------------------------------	--

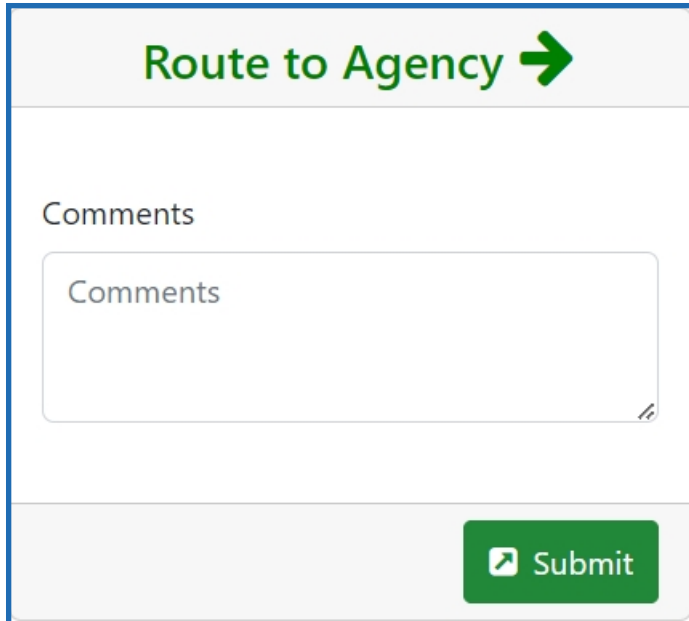
In signing this form, I certify that the statements therein are true and complete to the best of my knowledge. Willful provision of false information is a criminal offense (U.S. Code, Title 18, Section 1001). I am aware that any false, fictitious, or fraudulent statement may, in addition to other remedies available to the Government, subject me to civil penalties under the Program Fraud and Civil Remedies Act of 1986 (45 CFR Part 79). Also, if I have a payback obligation, I understand that payback service must begin within 2 years of terminating my Kirschstein-NRSA support; otherwise, financial payback becomes due, unless an extension of the 2-year service initiation period or a waiver of the obligation is awarded. I also understand that if I fail to repay both principal and interest, the Federal Government will take authorized actions to collect the debt.

Go Back and Edit

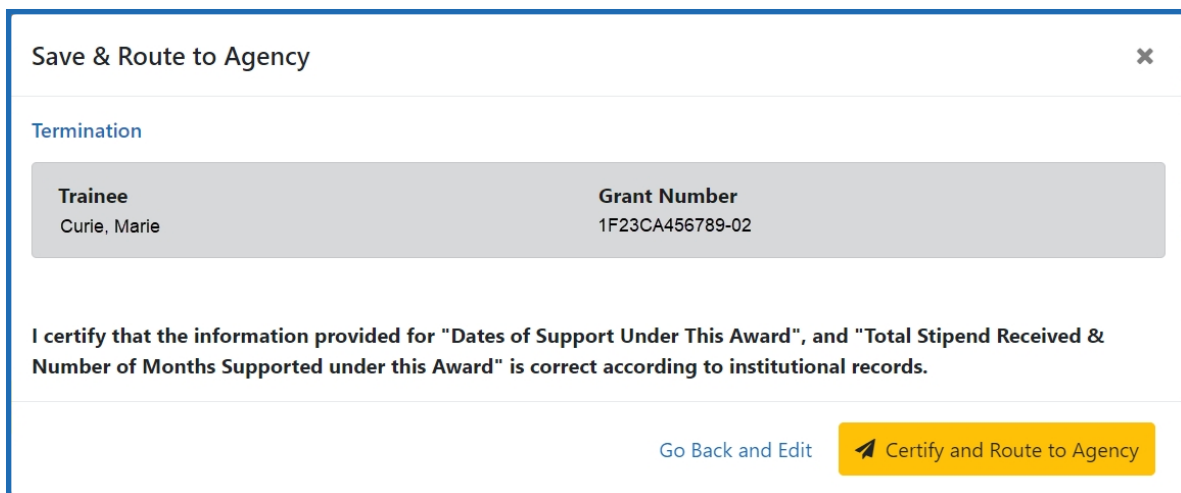
 Save & Route to PI

- Click the **Save & Route to PI** button.

## Route to Agency

A screenshot of a web form titled "Route to Agency" with a green arrow icon. Below the title is a "Comments" section with a text input field containing the placeholder "Comments". At the bottom right of the form is a green "Submit" button with a white icon of a document and an arrow.

- Make the appropriate edits to the form.
- Add comments to the **Comments** field if desired.
- Click the **Submit** button. A confirmation message displays.

A screenshot of a confirmation screen titled "Save & Route to Agency" with a close button (X) in the top right corner. Below the title is a section labeled "Termination" in blue. Under "Termination" is a table with two columns: "Trainee" and "Grant Number". The "Trainee" column contains "Curie, Marie" and the "Grant Number" column contains "1F23CA456789-02". Below the table is a paragraph: "I certify that the information provided for 'Dates of Support Under This Award', and 'Total Stipend Received & Number of Months Supported under this Award' is correct according to institutional records." At the bottom right are two buttons: "Go Back and Edit" in blue text and "Certify and Route to Agency" in a yellow button with a white icon of a document and an arrow.

- Click the Certify and **Route to Agency** button.

## **Termination Notice Screen**

The Termination Notice screen consists of four sections: Grant Details, Person Details, Post Award Details, and Take Action.

Termination Notices ?

Details for 1T23HL456789-38

Budget Period

09/01/2022 - 08/31/2023

Awarded PD/PI

✉ SKŁODOWSKA, SALOMEA

Project Title

Long-Term Effects of Radium Exposure on Nearby Inhabitants

Institution

UNIVERSITY OF PARIS

Curie, Marie

...

TerminationPRE-DOCIn Progress Trainee

Total NRSA Support Under This Award

Degree

Routing History

Termination Date: \*

02/28/2023

Business Official \*

Joseph Ulam

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

Attached is the PDF of the abstract.

1963 characters remaining

Supporting Documentation (optional)

[View Uploaded PDF File](#)

Post Award Details

Activity

Research

Organization

Academic

Type of Position

Student

Post Award Position

Position Title

Medical Student

Name Of Organization

University of Paris

City

State

Post Award Mailing Address

Address Line 1

City

State

Zip

Email

eRATest@mail.nih.gov

Take Action

Save Draft

Save as Draft

Save & Route to PI

Comments

Comments

Send

## Grant Details section

This section contains details about the grant.

## Person Details section

This section contains information about the trainee, background information, and their training under the grant.

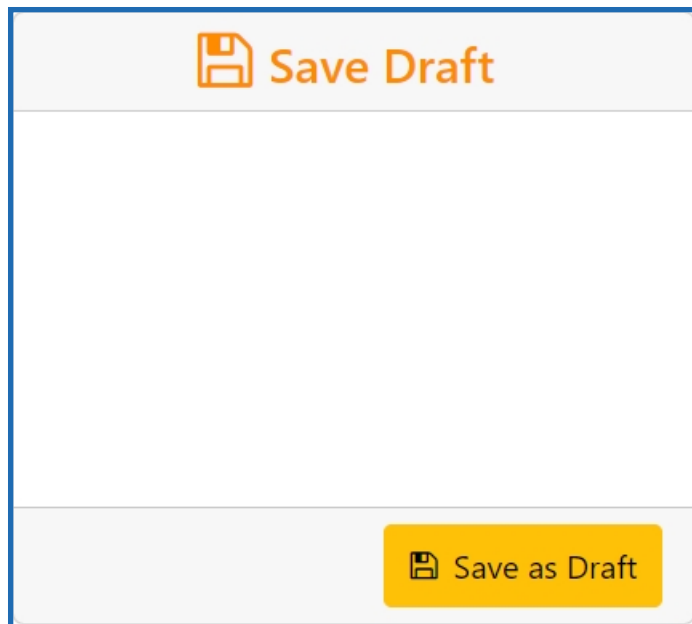
## Post Award Details section

This section contains information about the trainee's post award activities and positions.

## Take Action section

This section contains options to edit the notice and route it onward for processing.

### Save Draft

A screenshot of a web interface element. It features a light gray rectangular box with a blue border. At the top, there is a header bar with an orange floppy disk icon and the text 'Save Draft' in orange. The main area of the box is white and empty. At the bottom right, there is a yellow button with a black floppy disk icon and the text 'Save as Draft' in black.

1. Make the appropriate edits to the form.
2. Click the **Save as Draft** button. A confirmation message displays.



Review Termination Form for Save

Termination

<b>Trainee</b> Curie, Marie	<b>Grant Number</b> 1T23DK456789-08
--------------------------------	--

Go Back and Edit Save

3. Click the **Save** button. Your edits are saved and the form remains in your queue.

### Save & Route to Trainee

Save & Route to Trainee →

Comments

Comments

Send

1. Add comments to the **Comments** field if desired.
2. Click the **Send** button. A confirmation message displays.

Save & Route to Trainee

Termination

<b>Trainee</b> Curie, Marie	<b>Grant Number</b> 1T23HL456789-38
--------------------------------	--

[Go Back and Edit](#)
[Save & Route to Trainee](#)

- Click the **Save & Route to Trainee** button.

## Save & Route to PI

Save & Route to PI →

Comments

Comments

Send

- Make the appropriate edits to the form.
- Add comments to the **Comments** field if desired.
- Click the **Send** button. A confirmation message displays.

Save & Route to PI

Termination

Trainee	Grant Number
Curie, Marie	1T23HL456789-38

In signing this form, I certify that the statements therein are true and complete to the best of my knowledge. Willful provision of false information is a criminal offense (U.S. Code, Title 18, Section 1001). I am aware that any false, fictitious, or fraudulent statement may, in addition to other remedies available to the Government, subject me to civil penalties under the Program Fraud and Civil Remedies Act of 1986 (45 CFR Part 79). Also, if I have a payback obligation, I understand that payback service must begin within 2 years of terminating my Kirschstein-NRSA support; otherwise, financial payback becomes due, unless an extension of the 2-year service initiation period or a waiver of the obligation is awarded. I also understand that if I fail to repay both principal and interest, the Federal Government will take authorized actions to collect the debt.

Go Back and Edit

Save & Route to PI

- Click the **Save & Route to PI** button.

## Route to Business Official

Route to Business Official

Comments

Comments

Send

- Make the appropriate edits to the form.

2. Add comments to the **Comments** field if desired.
3. Click the **Send** button. 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](#)

4. Click the **Save & Route to BO** button.

## Route to Agency

Route to Agency →

Comments

Comments

Submit

1. Make the appropriate edits to the form.
2. Add comments to the **Comments** field if desired.

3. Click the **Submit** button. A confirmation message displays.

Save & Route to Agency

Termination

<b>Trainee</b>	<b>Grant Number</b>
Curie, Marie	1F23CA456789-02

I certify that the information provided for "Dates of Support Under This Award", and "Total Stipend Received & Number of Months Supported under this Award" is correct according to institutional records.

[Go Back and Edit](#) [Certify and Route to Agency](#)

4. Click the Certify and **Route to Agency** button.

## Business Official/Signing Official Home Screen

The BO/SO home screen provides a dashboard allowing you to quickly locate and process work-in-progress (WIP) termination notices, appointment forms, and awarded grants at your institution.

**Business Official Home**

Q Find...

**Termination Notices**

Serial # or Trainee Name  
Ex. 123456 or Doe, John

Q

[See All 68 Pending Forms](#)

Q Find...

**Appointment Forms**

Serial # or Trainee Name  
Ex. 123456 or Doe, John

Q

[See All 131](#)

Q Find...

**Awarded Grants**

Serial # or PI Name  
Ex. 123456 or Doe, John

Q

[See All 443 Grants](#)

**Pending Forms**
13

Filter Table
13 Results

Download

Grid

1 of 1

Process Termination Notice For...	Termination Status	Appointment Start Date	Appointment End Date	Termination Date	Num of Months and Days	Degree Level	Award Number	PD/PI
<a href="#">Curie, Marie</a>	In Progress BO	03/02/2022 03/01/2023	03/02/2022 03/01/2023	03/01/2023	12 months 0 days	Pre-Doc	1F23CA456789-01	Curie, Marie
<a href="#">Franklin, Rosalind</a>	In Progress BO	01/01/2023 02/28/2023	01/01/2023 02/28/2023	02/28/2023	2 months 0 days	Pre-Doc	1T89HL456789-38	Franklin, Rosalind

**In Progress Termination Notices**

[With PI](#) 54  
[With Trainee](#) 0  
[With Any BO](#) 14  
[With Sponsor](#) 0

**In Progress Appointment Forms**

[With PI](#) 91  
[With Trainee](#) 40

In addition, there are tabs at the top of the screen that provide a focused view of awarded grants, WIP appointments, and WIP terminations.

xTrain |

Home
Awarded Grants
WIP Forms

## Using the Pending Termination Notices and Pending Appointment Forms cards

**Business Official Home**

Q Find...

**Termination Notices**

Serial # or Trainee Name  
Ex. 123456 or Doe, John

Q

[See All 68 Pending Forms](#)


Q Find...

**Appointment Forms**


Serial # or Trainee Name  
Ex. 123456 or Doe, John

Q

[See All 131](#)

1. Enter the serial number or trainee name in the search field on the appropriate card. As you type, possible matches are displayed. You may select a match from the list or simply click the  **Search** button to search for the typed text.

Serial # or Trainee Name

Curie


Curie, Marie  
Curie, Pierre


A list of possible matches is displayed.

Showing 2 match for "Curie"
[See All 70 WIP Appointment Forms](#)
[Perform new search](#)

Filter Table
2 Results


1 of 1

Process Appointment Form For...	Appt. Status	Appt. Type	Appt. Start & End Date	Duration of Appt.	Degree Level	Award Number	PD/PI	Institution
<a href="#">Curie, Marie</a>	Hold	Reappt.	07/01/2022 06/30/2023	12 months 0 days	Post-Doc	1T23OD456789-01	Curie, Marie	University of Paris
<a href="#">Curie, Pierre</a>	Pending	New	06/01/2022 08/31/2022	3 months 0 days	Pre-Doc	1T23OD456789-01	Curie, Marie	University of Paris

2. Click the  **Actions** button to view a list of available options.

Showing 2 match for "Curie"
[See All 70 WIP Appointment Forms](#)
[Perform new search](#)

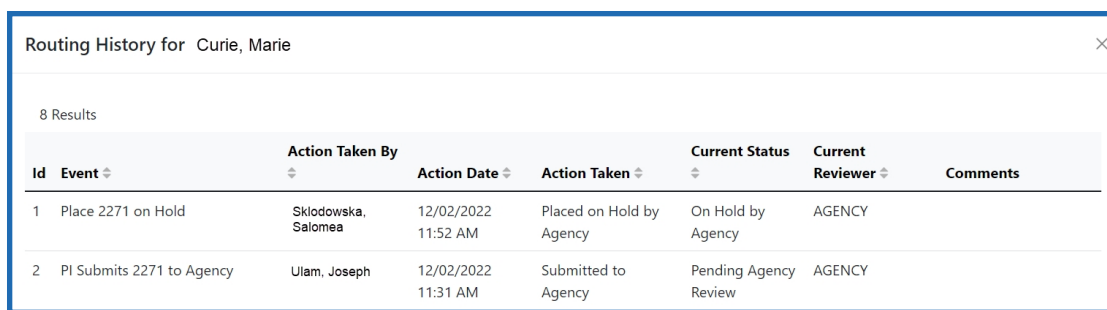
Filter Table
2 Results


1 of 1

Process Appointment Form For...	Appt. Status	Appt. Type	Appt. Start & End Date	Duration of Appt.	Degree Level	Award Number	PD/PI	Institution
<a href="#">Curie, Marie</a>	Hold	Reappt.	07/01/2022 06/30/2023	12 months 0 days	Post-Doc	1T23OD456789-01	Curie, Marie	University of Paris
<a href="#">Curie, Pierre</a>	Pending	New	06/01/2022 08/31/2022	3 months 0 days	Pre-Doc	1T23OD456789-01	Curie, Marie	University of Paris

- View Trainee Roster
- View Appointment Form
- View Routing History
- Create Service Desk Ticket

- **View Trainee Roster** opens the Grant Details screen.
- **View Appointment Form** downloads the Statement of Appointment form. You may also click the trainee name to view the appointment form in the browser. Only available for pending appointment forms.
- **View Termination Notice** downloads the Termination Notice form. You may also click the trainee name to view the Termination Notices screen in the browser, which contains grant details. Only available for pending termination notices.
- **View Routing History** displays the routing history for the current appointment form. [Click here to view the Routing History.](#)



8 Results							
Id	Event	Action Taken By	Action Date	Action Taken	Current Status	Current Reviewer	Comments
1	Place 2271 on Hold	Skłodowska, Salomea	12/02/2022 11:52 AM	Placed on Hold by Agency	On Hold by Agency	AGENCY	
2	PI Submits 2271 to Agency	Ulam, Joseph	12/02/2022 11:31 AM	Submitted to Agency	Pending Agency Review	AGENCY	

- **Create Service Desk Ticket** opens a [form prefilled with grant and trainee details.](#)



Create Service Desk Ticket

\* Required Fields

Grant Number

1T23OD456789-01

Appl ID

12345678

Trainee Name

Curie, Marie

PD/PI Name

Curie, Marie

Institution

UNIVERSITY OF PARIS

Submitter Email \*

Subject \*

Issue Description \*

Close

Submit Ticket

Complete the form and click the **Submit Ticket** button to create the ticket.

## Using the Awarded Grants card

Q Find...

Awarded Grants

Serial # or PI Name

Ex. 123456 or Doe, John

Q

[See All 443 Grants](#)

1. Enter the serial number or PI name in the search field on the appropriate card. Note that serial numbers must be at least six (6) digits long. As you type, possible matches are displayed. You may select a match from the list or simply click the



**Search** button to search for the typed text.

A screenshot of the 'Awarded Grants' search interface. At the top, there's a 'Find...' header. Below it, the title 'Awarded Grants' is centered. A search field labeled 'Serial # or PI Name' contains the text 'Curie'. To the right of the field is a blue search button with a magnifying glass icon. Below the search field, a dropdown list shows two suggestions: 'Curie, Marie' and 'Curie, Pierre'.

A list of possible matches is displayed.

A screenshot of the search results page. At the top, a green banner says 'Showing 2 Open Grants with PI Name "CURIE, MARIE"'. To the right are links 'See All 113 Grants' and 'Perform New Search'. Below the banner, there are 'Quick Filters' and 'Activity Types' with toggle switches for T, R, K, F, 'Include Closed', and 'Include All Other ICs'. A dropdown menu 'Please select the IC' is set to 'OD'. The results section shows '2 Results' and a table with columns: Number, Project Start Date, Project End Date, Project Title, and Special Funding. Two results are listed: 'T23 OD 456789' with project title 'Long-Term Effects of Radium Exposure on Nearby Inhabitants' and 'T12 OD 456798' with project title 'X-Ray Crystallography and the Molecular Structure of DNA'.

2. Click the **Actions** button to view a list of available options.

Showing 2 Open Grants with PI Name "CURIE, MARIE" [See All 113 Grants](#) [Perform New Search](#)

Quick Filters Activity Types:

T R K F Include Closed Include All Other ICs

Please select the IC

OD Curie, Marie

Filter Table 2 Results

Number	Project Start Date	Project End Date	Project Title	Special Funding
T23 OD 456789	07/01/2005	06/30/2026	Long-Term Effects of Radium Exposure on Nearby Inhabitants	
T12 OD 456798	04/30/2024		X-Ray Crystallography and the Molecular Structure of DNA	

Trainee Roster  
Create Service Desk Ticket

- Select **Trainee Roster** to open the Grant Details screen. Refer to the *Grant Details Screen* on page 15 topic for more information.
- Select **Create Service Desk Ticket** to create a service desk ticket pre-populated with grant information. Complete the ticket, then click the **Submit Ticket** button to send it to the service desk.


## Using the Pending Forms table

Pending Forms 13

Filter Table 13 Results

Process Termination Notice For...	Termination Status	Appointment Start Date	Appointment End Date	Termination Date	Num of Months and Days	Degree Level	Award Number	PD/PI
<a href="#">Curie, Marie</a>	In Progress BO	03/02/2022 03/01/2023	03/02/2022 03/01/2023	03/01/2023	12 months 0 days	Pre-Doc	1F23CA456789-01	Curie, Marie
<a href="#">Franklin, Rosalind</a>	In Progress BO	01/01/2023 02/28/2023	01/01/2023 02/28/2023	02/28/2023	2 months 0 days	Pre-Doc	1T89HL456789-38	Franklin, Rosalind

The Pending Forms table provides you with quick access to forms that are in your queue.

- Click the  **Actions** button to view a list of available options for a trainee. For information about the options, refer to the on page 34 detailed above.
- To process a form, click the hyperlinked trainee's name to view the Termination Notices or Appointment Forms screen. For more information, refer to the *Terminating Institutional Research Training Programs* on page 80 and *Appointments* on page 56 topics.

## Using the In Progress Termination Notices and In Progress Appointment Forms tables

In Progress Termination Notices	In Progress Appointment Forms
<a href="#">With PI</a> 54	<a href="#">With PI</a> 91
<a href="#">With Trainee</a> 0	<a href="#">With Trainee</a> 40
<a href="#">With Any BO</a> 14	
<a href="#">With Sponsor</a> 0	

The In Progress Termination Notices and In Progress Appointment Forms tables contain links to pending termination notices and appointment forms broken out by category.

1. Click a hyperlinked category to view a list of pending forms in that category. Depending on the category, BOs and SOs may be able to process forms in others' queues. For example, BOs can process forms in the **With Any BO** category.

## Appointment and Termination Statuses

### Appointment Statuses

- **Pending Agency Review** - The appointment has been submitted to the agency.
- **On Hold by Agency** - The appointment has been submitted and the agency reviewer has put it on hold.
- **On Hold by Agency - Awaiting Paper Signature** - The appointment has been submitted and the agency reviewer has put it on hold while waiting for the Payback Agreement and/or the documentation for a permanent resident.
- **In Progress PI** - The PD/PI or the assistant is working on the appointment.
- **In Progress Trainee** - The trainee is working on the appointment.
- **In Progress BO** - The BO is working on the appointment.
- **Accepted** - The agency reviewer has accepted the appointment.
- **Terminated** - The appointment or fellowship has been terminated.

## Termination Statuses

- **In Progress BO** - The Business Official is working on the termination notice.
- **In Progress PI** - The PD/PI (includes fellows) or an assistant is working on the termination notice.
- **In Progress Trainee** - The Trainee is working on the termination notice.
- **Pending Agency Review** - The termination notice has been submitted to the Agency
- **On Hold by Agency** - The Agency has reviewed the termination notice, but has not yet accepted it.
- **On Hold by Agency - Awaiting Award Revision** –An early termination notice has been submitted for a fellowship and it has been placed on hold until the award can be revised
- **Accepted** - The Agency has accepted the termination notice. When the termination status is "Accepted," the appointment status is "Terminated."

## Accessing xTrain

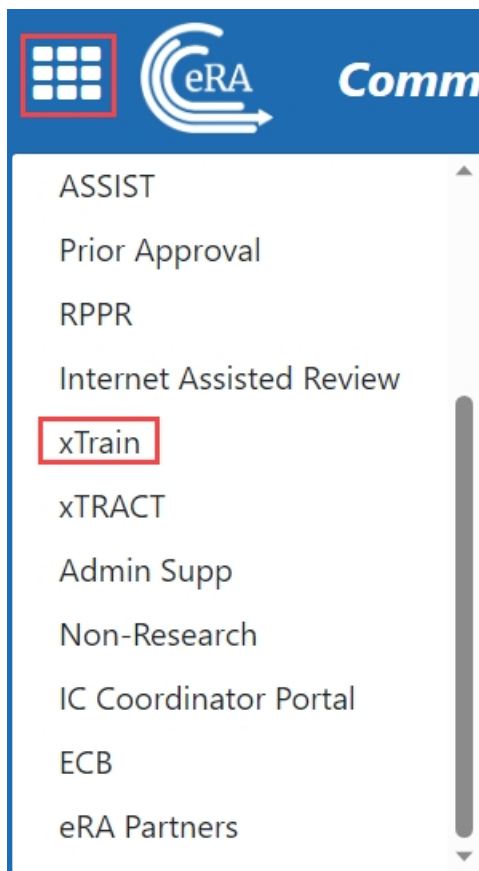
Access xTrain from eRA Commons. You need an eRA Commons account to use xTrain.

See the eRA Commons online help for details on accessing eRA Commons and obtaining a Commons user account. Look for sections on:

- [About eRA Commons](#)
- [Logging into eRA Commons](#)
- [Welcome to eRA Commons](#)

To log in to xTrain:

1. Log in to eRA Commons at <https://public.era.nih.gov/commons/>. See <https://era.nih.gov/erahelp/commons/#Commons/access/login.htm> for complete details.
2. Once logged in to eRA Commons, click the **Apps** menu and select **xTrain**.



When you access xTrain, the system displays the appropriate screen based on your role. The table below lists external user roles and the default screen displayed at xTrain access for the user role.

Role	Default Screen Display
PD/PI	Awarded Grants
ASST with xTrain delegation	Default for selected user
Trainee	Appointments and Terminations
SO or BO	Business Official Home
Sponsor	Awarded Grants

xTrain only populates lists with grants associated with the eRA Commons account with which you are logged in. If you have multiple eRA Commons accounts, you may need to merge the historical information associated with your accounts.

## Accessing xTrain as a Delegate

Commons allows you to designate other users as your delegates, so that they can take action on your behalf. For more information on delegate permissions, review the [Delegations topic](#) in the eRA Commons help.

On login, xTrain users designated as a delegate will be presented with the **Taking action on behalf of** screen.

**Taking action on behalf of**

**i** When you select a user from the drop down, you will be able to perform actions as that individual in xTrain. You may change who you wish to take actions on behalf of at any time, but it will refresh the system.

**Take Action as...**

Select a Delegator

Curie, Marie .. Act as Yourself (BO)

Rotblat, Stanislaw (PI)

Skłodowska, Salomea (PI and SPONSOR)

Ulam, Joseph (PI)

**Confirm Selection**

1. Click the **Take Action as** drop-down and select the appropriate user.
2. Click the **Confirm Selection** button to log in to xTrain as a delegate of that user. A notation is displayed in the upper right-corner of the screen indicating the user you are acting as.

xTrain | Home | Awarded Grants | WIP Forms

**Business Official Home**

Taking action as Curie, Marie (BO) [change](#)

**Termination Notices**

Serial # or Trainee Name

Ex. 123456 or Doe, John

[See All 68 Pending Forms](#)

**Appointment Forms**

Serial # or Trainee Name

Ex. 123456 or Doe, John

[See All 131](#)

**Awarded Grants**

Serial # or PI Name

Ex. 123456 or Doe, John

[See All 443 Grants](#)


3. Click the **Change** link in the upper-right corner of the screen to reopen the **Taking action on behalf of** screen and change users.

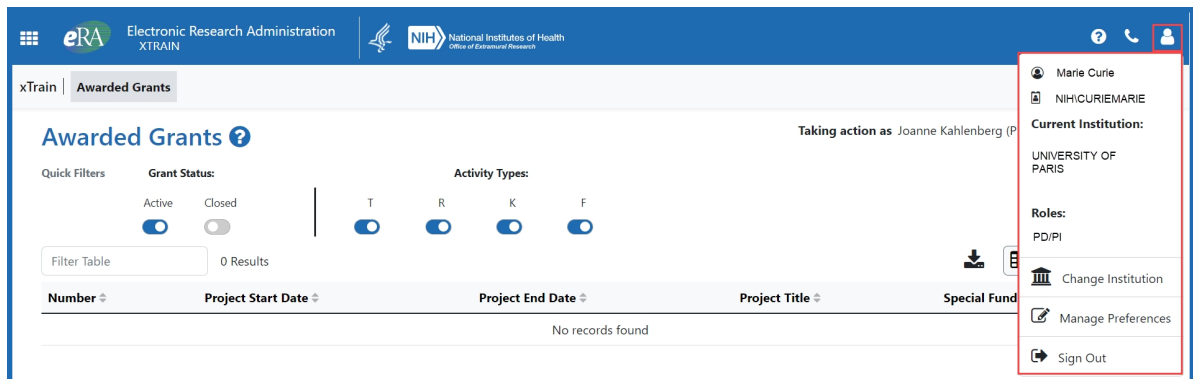
## Accessing xTrain with Multiple Institutional Affiliations

xTrain users affiliated with more than one institution can select which institution to work with after logging into xTrain.

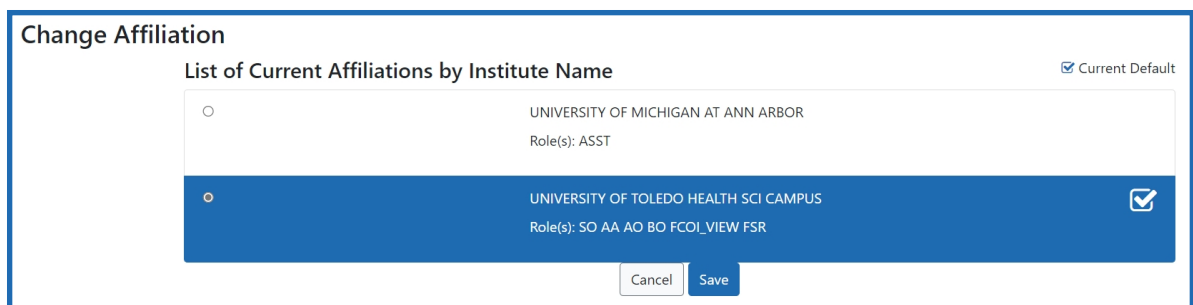


1. Log into xTrain.

2. Click the  **Person** icon in the upper-right corner of the screen. A menu is displayed, listing your current institution and roles.




3. Click **Change Institution**. The Change Affiliation screen is displayed. The current institution and roles are highlighted in blue.



4. Click the radio button for the institution you wish to use.

5. Click the **Save** button. The change is saved and you are returned to the Commons home screen.

6. Navigate to xTrain and, if desired, click the  **Person** icon in the upper-right corner of the screen to confirm your current institution and roles.

---

**NOTE:** Changing the institution can be done from any screen in Commons.

---

## PD/PI Home Screen - Awarded Grants

The PD/PI home screen displays all training grants for which the user is listed as the PD/PI.

**Awarded Grants ?**

Quick Filters

Grant Status: Active ☒ Closed ☐

Activity Types: T ☒ R ☒ K ☒ F ☒

Filter Table  2 Results

Download icon, Grid icon, 1 of 1, Next/Previous icons

Number	Project Start Date	Project End Date	Project Title	Special Funding
<a href="#">R12 ES 345678</a>	09/01/2021	08/31/2026	Long-Term Effects of Radium Exposure on Nearby Inhabitants	
<a href="#">T34 ES 567890</a>	07/01/1979	06/30/2025	X-Ray Crystallography and the Molecular Structure of DNA	

### Using the Quick Filter toggles

The toggles allow you to filter grants by grant status and activity type. Blue indicates that you are filtering for that option; gray indicates that you are filtering out that option.

**Quick Filters**

**Grant Status:** Active ☒ Closed ☐

**Activity Types:** T ☒ R ☒ K ☐ F ☐

For example, the toggles in the image above will filter for active training grants.

### Using the Filter Table field

The **Filter Table** field allows you to filter the table by any field containing text. The search criteria include Number, Project Start Date, Project End Date, Project Title, and Special Funding.

**Awarded Grants ?**

Quick Filters

Grant Status: Active ☒ Closed ☐

Activity Types: T ☒ R ☒ K ☒ F ☒


Filter Table  2 Results



Download icon, Grid icon, 1 of 1, Next/Previous icons

Number	Project Start Date	Project End Date	Project Title	Special Funding
<a href="#">R12 ES 345678</a>	09/01/2021	08/31/2026	Long-Term Effects of <b>Radium</b> Exposure on Nearby Inhabitants	
<a href="#">T34 ES 567890</a>	07/01/1979	06/30/2025	X-Ray Crystallography and the Molecular Structure of DNA	

The table is filtered as you type in the **Filter Table** field. Matches are highlighted in yellow.

## Viewing a Training Roster

Click the  **Actions** button to view grant options, then select **Training Roster**.


Number ▾		Project Start Date ▾	Proj
<a href="#">R12 ES 345678</a>	...	09/01/2021	08/3
<a href="#">T34 ES 567890</a>	<div>  Training Roster                    Create Service Desk Ticket             </div>		

-or-

Click a hyperlinked **Grant Number**.

The Trainee Roster screen is displayed.

## Creating a Service Desk Ticket

Click the  **Actions** button to view grant options, then select **Create Service Desk Ticket** to create a service desk ticket prepopulated with grant information. Complete the ticket, then click the **Submit Ticket** button to send it to the service desk.

Create Service Desk Ticket

\* Required Fields

<b>Grant Number</b>	<b>Appl ID</b>
R12 ES 345678	1234567
<b>Institution</b>	<b>PD/PI Name</b>
UNIVERSITY OF PARIS	Curie, Marie
<b>Submitter Email *</b>	
<input type="text"/>	
<b>Subject *</b>	
<input type="text"/>	
<b>Issue Description *</b>	
<input type="text"/>	

Close

Submit Ticket

## Viewing a Grant

Click any hyperlinked **Grant Number** to view the *Trainee Roster* screen. For more information, refer to the *Trainee Roster Screen* on page 9topic.

## Accessing xTrain as a Trainee

The Trainee home screen contains two sections: My Profile Details and My Forms.

**Trainee Appointment Home**

### My Profile Details

⚠ Please verify your **Personal Profile** for accuracy.

<b>Last Name, First Name MI</b> Curie, Marie <b>User ID</b> CURIEMARIE <b>Address</b>	<b>Email</b> eRATest@mail.nih.gov <b>Institution</b> UNIVERSITY OF PARIS <b>Phone</b>	<b>My Degrees</b> 2 Results <table border="1"> <thead> <tr> <th>Degrees(s)</th> <th>Completion Date</th> <th>Major/Minor</th> </tr> </thead> <tbody> <tr> <td>BA</td> <td>✓ 06/2018</td> <td>Neuroscience</td> </tr> <tr> <td>MD</td> <td>★ 05/2024</td> <td>N/A</td> </tr> </tbody> </table>	Degrees(s)	Completion Date	Major/Minor	BA	✓ 06/2018	Neuroscience	MD	★ 05/2024	N/A
Degrees(s)	Completion Date	Major/Minor									
BA	✓ 06/2018	Neuroscience									
MD	★ 05/2024	N/A									

### My Forms (2)

**Your Termination for 5T35HL007690-38**

**In Progress Trainee**

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

**Appointment Start Date**  
01/01/2023

**Termination Date**  
02/28/2023

**Stipend Amount**  
\$4,392.00

[View Form](#) [Go to Form](#)

**Your Appointment for 5T35HL007690-38**

**Accepted New**

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

**Appointment Start Date**  
01/01/2023

**Appointment End Date**  
02/28/2023

**Stipend Amount**  
\$4,392.00

[View Form](#) [Go to Form](#)

Figure 3: Trainee Appointments and Terminations Screen

## My Profile Details section

1. Review the information in the section for accuracy.
2. To make changes, click the **Personal Profile** link. The Personal Profile Summary for your Commons account is displayed. For more information, review the [Personal Profile Summary](#) topic in the eRA Commons help.

## My Forms section

Termination and appointment forms are listed in the My Forms section.

1. To view a PDF version of a form, click the **View Form** button. The PDF is downloaded to the browser's default location.
2. To view a form onscreen, click the **Go to Form** button. In the case of forms that require your input, this will allow you to enter information and route the form onward for processing.

For more information on trainee Termination Notices and Appointment Forms, refer to the *Termination Notice Screen* on page 25 and *Appointment Form Screen* on page 18 topics.

## Business Official/Signing Official Home Screen

The BO/SO home screen provides a dashboard allowing you to quickly locate and process work-in-progress (WIP) termination notices, appointment forms, and awarded grants at your institution.

The screenshot displays the 'Business Official Home' dashboard. It features three main search panels at the top: 'Termination Notices' (68 pending forms), 'Appointment Forms' (131 total), and 'Awarded Grants' (443 total). Below these is a 'Pending Forms' section with 13 results, showing a table of active notices and appointments. At the bottom, there are two summary boxes: 'In Progress Termination Notices' and 'In Progress Appointment Forms', each with filters for 'With PI', 'With Trainee', 'With Any BO', and 'With Sponsor'.

Process Termination Notice For...	Termination Status	Appointment Start Date	Appointment End Date	Termination Date	Num of Months and Days	Degree Level	Award Number	PD/PI
<a href="#">Curie, Marie</a>	In Progress BO	03/02/2022 03/01/2023	03/02/2022 03/01/2023	03/01/2023	12 months 0 days	Pre-Doc	1F23CA456789-01	Curie, Marie
<a href="#">Franklin, Rosalind</a>	In Progress BO	01/01/2023 02/28/2023	01/01/2023 02/28/2023	02/28/2023	2 months 0 days	Pre-Doc	1T89HL456789-38	Franklin, Rosalind

In addition, there are tabs at the top of the screen that provide a focused view of awarded grants, WIP appointments, and WIP terminations.

The screenshot shows the top navigation bar with four tabs: 'xTrain', 'Home' (which is the active tab), 'Awarded Grants', and 'WIP Forms' with a dropdown arrow.

## Using the Pending Termination Notices and Pending Appointment Forms cards

**Business Official Home**

Q Find...

**Termination Notices**

Serial # or Trainee Name  
Ex. 123456 or Doe, John

Q

[See All 68 Pending Forms](#)

Q Find...

**Appointment Forms**

Serial # or Trainee Name  
Ex. 123456 or Doe, John

Q

[See All 131](#)

- Enter the serial number or trainee name in the search field on the appropriate card. As you type, possible matches are displayed. You may select a match from the list or simply click the **Search** button to search for the typed text.

Serial # or Trainee Name

Curie

Curie, Marie  
Curie, Pierre

Q

A list of possible matches is displayed.


Showing 2 match for "Curie"

[See All 70 WIP Appointment Forms](#)
[Perform new search](#)

Filter Table
2 Results

1 of 1

Process Appointment Form For...	Appt. Status	Appt. Type	Appt. Start & End Date	Duration of Appt.	Degree Level	Award Number	PD/PI	Institution
<a href="#">Curie, Marie</a>	! *** Hold	Reappt.	07/01/2022 06/30/2023	12 months 0 days	Post-Doc	1T23OD456789-01	Curie, Marie	University of Paris
<a href="#">Curie, Pierre</a>	*** Pending	New	06/01/2022 08/31/2022	3 months 0 days	Pre-Doc	1T23OD456789-01	Curie, Marie	University of Paris

2. Click the  **Actions** button to view a list of available options.

Showing 2 match for "Curie" [See All 70 WIP Appointment Forms](#) [Perform new search](#)

Filter Table 2 Results

Process Appointment Form For...	Appt. Status	Appt. Type	Appt. Start & End Date	Duration of Appt.	Degree Level	Award Number	PD/PI	Institution
<a href="#">Curie, Marie</a>	Hold	Reappt.	07/01/2022 06/30/2023	12 months 0 days	Post-Doc	1T23OD456789-01	Curie, Marie	University of Paris
<a href="#">Curie, Pierre</a>			06/01/2022 08/31/2022	3 months 0 days	Pre-Doc	1T23OD456789-01	Curie, Marie	University of Paris

[View Trainee Roster](#)  
[View Appointment Form](#)  
[View Routing History](#)  
[Create Service Desk Ticket](#)

- **View Trainee Roster** opens the Grant Details screen.
- **View Appointment Form** downloads the Statement of Appointment form. You may also click the trainee name to view the appointment form in the browser. Only available for pending appointment forms.
- **View Termination Notice** downloads the Termination Notice form. You may also click the trainee name to view the Termination Notices screen in the browser, which contains grant details. Only available for pending termination notices.
- **View Routing History** displays the routing history for the current appointment form. [Click here to view the Routing History.](#)

Routing History for Curie, Marie

8 Results

Id	Event	Action Taken By	Action Date	Action Taken	Current Status	Current Reviewer	Comments
1	Place 2271 on Hold	Skłodowska, Salomea	12/02/2022 11:52 AM	Placed on Hold by Agency	On Hold by Agency	AGENCY	
2	PI Submits 2271 to Agency	Ulam, Joseph	12/02/2022 11:31 AM	Submitted to Agency	Pending Agency Review	AGENCY	

- **Create Service Desk Ticket** opens a [form prefilled with grant and trainee details.](#)



Create Service Desk Ticket

\* Required Fields

Grant Number

1T23OD456789-01

Appl ID

12345678

Trainee Name

Curie, Marie

PD/PI Name

Curie, Marie

Institution

UNIVERSITY OF PARIS

Submitter Email \*

Subject \*

Issue Description \*

Close

Submit Ticket

Complete the form and click the **Submit Ticket** button to create the ticket.

## Using the Awarded Grants card

Q Find...

Awarded Grants

Serial # or PI Name

Ex. 123456 or Doe, John

See All 443 Grants


1. Enter the serial number or PI name in the search field on the appropriate card. Note that serial numbers must be at least six (6) digits long. As you type, possible matches are displayed. You may select a match from the list or simply click the



**Search** button to search for the typed text.

A list of possible matches is displayed.

Number	Project Start Date	Project End Date	Project Title	Special Funding
<a href="#">T23 OD 456789</a>	07/01/2005	06/30/2026	Long-Term Effects of Radium Exposure on Nearby Inhabitants	
<a href="#">T12 OD 456798</a>	06/01/2002	04/30/2024	X-Ray Crystallography and the Molecular Structure of DNA	

2. Click the  **Actions** button to view a list of available options.

Showing 2 Open Grants with PI Name "CURIE, MARIE" [See All 113 Grants](#) [Perform New Search](#)

Quick Filters Activity Types:

T R K F Include Closed Include All Other ICs

Please select the IC

OD Curie, Marie

Filter Table 2 Results

Number	Project Start Date	Project End Date	Project Title	Special Funding
T23 OD 456789	07/01/2005	06/30/2026	Long-Term Effects of Radium Exposure on Nearby Inhabitants	
T12 OD 456798	04/30/2024		X-Ray Crystallography and the Molecular Structure of DNA	

Trainee Roster  
Create Service Desk Ticket

- Select **Trainee Roster** to open the Grant Details screen. Refer to the *Grant Details Screen* on page 15 topic for more information.
- Select **Create Service Desk Ticket** to create a service desk ticket pre-populated with grant information. Complete the ticket, then click the **Submit Ticket** button to send it to the service desk.


## Using the Pending Forms table

Pending Forms 13

Filter Table 13 Results

Process Termination Notice For...	Termination Status	Appointment Start Date	Appointment End Date	Termination Date	Num of Months and Days	Degree Level	Award Number	PD/PI
<a href="#">Curie, Marie</a>	In Progress BO	03/02/2022 03/01/2023	03/02/2022 03/01/2023	03/01/2023	12 months 0 days	Pre-Doc	1F23CA456789-01	Curie, Marie
<a href="#">Franklin, Rosalind</a>	In Progress BO	01/01/2023 02/28/2023	01/01/2023 02/28/2023	02/28/2023	2 months 0 days	Pre-Doc	1T89HL456789-38	Franklin, Rosalind

The Pending Forms table provides you with quick access to forms that are in your queue.

- Click the  **Actions** button to view a list of available options for a trainee. For information about the options, refer to the on page 51 detailed above.
- To process a form, click the hyperlinked trainee's name to view the Termination Notices or Appointment Forms screen. For more information, refer to the *Terminating Institutional Research Training Programs* on page 80 and *Appointments* on page 56 topics.

## Using the In Progress Termination Notices and In Progress Appointment Forms tables

In Progress Termination Notices	In Progress Appointment Forms
<a href="#">With PI</a> 54	<a href="#">With PI</a> 91
<a href="#">With Trainee</a> 0	<a href="#">With Trainee</a> 40
<a href="#">With Any BO</a> 14	
<a href="#">With Sponsor</a> 0	

The In Progress Termination Notices and In Progress Appointment Forms tables contain links to pending termination notices and appointment forms broken out by category.

1. Click a hyperlinked category to view a list of pending forms in that category. Depending on the category, BOs and SOs may be able to process forms in others' queues. For example, BOs can process forms in the **With Any BO** category.

## Appointments

A trainee may be appointed at any time during the grant budget period for an appointment period of 9 to 12 months (for T-activity codes that are not T35), without prior approval by the NIH awarding office.

The time period may be different for scholars appointed to institutional career development awards and participants appointed to research education awards.

At the time of the initial appointment and any subsequent reappointment, the training PD/PI must submit a Statement of Appointment to the NIH awarding office. The Statement of Appointment includes biographical and other information on the trainee and the stipend level for the period of appointment.

In addition to the Statement of Appointment, a signed Payback Agreement must be submitted for each postdoctoral trainee who is in his/her first 12 months of Kirschstein-NRSA postdoctoral support.

Quick Reference: <https://www.era.nih.gov/files/Initiating%20an%20Appointment%20QRG.pdf>

For more information concerning the 2271 form, refer to the *Appendix A – Statement of Appointment (Form PHS 2271)* on page 127 topic.



Figure 4: Appointment Process Flow

## Create New Appointment by PD/PI

PD/PIs are responsible for creating new appointments for funded budget periods.

**NOTE:** If the trainee has already been appointed and is being extended for additional time, do not create a new appointment. Instead use the Reappoint option. If you create a new appointment for an existing trainee, the appointment will be converted to a reappointment on the 2271 form.

### Create a new appointment

1. In the Awarded Grants table, click the hyperlinked grant number to display the Trainee Roster screen.
2. In the grant details section, click the **Start New** link under **Appointments**.

Select Grants to Display

Years With Pending Forms

1T23HL456789-38

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

🕒 In Progress

Appointments 0

Terminations 6

[+ Start New](#)

Pre-Doc Months

Awarded 0

Accepted 48

Overage: 48

Post-Doc Months

Awarded 0

Accepted 0

Remaining: 0

Short Term Months

Awarded 96

Accepted 0

Remaining: 0

See Slots

Appointments

58

June 2, 2025

The **Create Appointment - Find Trainee** screen is displayed.

**Create Appointment - Find Trainee**

Details for 1T23HL456789-38

<b>Budget Period</b> 09/01/2022 - 08/31/2023	<b>Fiscal Year</b> 2022	<b>Project Period</b> 05/01/1980 - 08/31/2025	<b>Grant Management Specialist</b> ✉ <a href="#">Skłodowska, Salomea</a>	<b>Program Official</b> ✉ <a href="#">Ulam, Joseph</a>
---	----------------------------	--	---	---

**Find Trainee**

Trainee Commons Username:  Trainee Last Name:  Trainee Middle Name:  Trainee First Name:  Trainee Email Address:

**Results**

Filter Table 1 Results

Name	Institution	Email	Address	Commons User ID
<a href="#">Curie, Marie</a>	University of Paris	<a href="mailto:eRATest@mail.nih.gov">eRATest@mail.nih.gov</a>		CURIEMARIE

Can't find the Trainee you're looking for? [✉ Invite Trainee to Register a Commons Account](#)

3. Enter search criteria in the **Find Trainee** section.

**TIP:** Trainee Commons Username and Trainee Email Address are particularly useful for searching because they are unique per user.

4. Click the **Search** button. A list of possible matches is displayed in the **Results** section.
5. If the trainee you wish to appoint is not listed, click the **Invite Trainee to Register a Commons Account** link, complete the form, and click the **Send Invite** button.
6. If the trainee you wish to appoint is listed, click the trainee's hyperlinked name to select them. The Appointment Form screen is displayed with some fields pre-populated from the trainee's profile.




### Appointment Form

Details for 1T23HL456789-38 ...

<b>Budget Period</b> 09/01/2022 - 08/31/2023	<b>Fiscal Year</b> 2022	<b>Project Period</b> 05/01/1980 - 08/31/2025	<b>Grant Management Specialist</b> ✉ <a href="#">Rotblat, Stanislaw</a>	<b>Program Official</b> ✉ <a href="#">Ulam, Joseph</a>
---	----------------------------	--	--	---

▶ Slot Data

Process Statement of Training Appointment


Curie, Marie
New Post-Doc

Prior NRSA Support

1 Results

Award #	PD/PI	Appointment Start Date	Appointment End Date	Termination Date	Stipend/Salary Amt	Degree Level	Status
1T23HL456789-38	SKLODOWSKA, SALOMEA	01/01/2023	02/28/2023	02/28/2023	\$4,392	PRE-DOC	Accepted Appointment

**Period of Appointment**

**From:** 09/01/2022

**To:** 08/31/2023

**Duration:**  
Months: 12 and Days: 0

**Support for Period of Appointment**

**Stipend Level or Salary \***  
0 - 54,840 POST-DOC

**Stipend/Salary/Other Compensation \***  
\$54,840

**Degree(s): Earned/In Progress**

2 Results

Degrees(s) ⇅	Completion Date ⇅	Major/Minor ⇅
BA	✓ 06/2018	Neuroscience
MD	★ 05/2024	N/A

**Trainee Background**


**Field of Research Trainings or Career Development Code \***  
---Epidemiology (134)


**Education Level \***  
Graduate Student

**Name of Specialty Boards**  
Internal Medicine: Infectious Disease

**Dual Degree \***  
No

Take Action

 Save Draft

 Save as Draft

- Complete the Appointment Form as appropriate. Required fields are marked with a red asterisk (\*).

**IMPORTANT:** Below are the Business Rules for the Appointment Form.

Period cannot exceed 12 months and the start date must fall within the budget period.

The Stipend level must be entered for everyone except for scholars and participants.

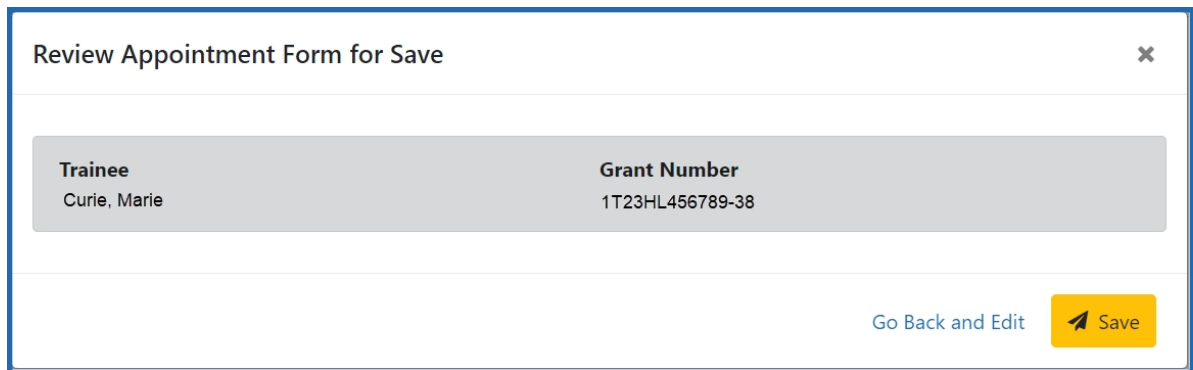
Must be appropriate to trainee degree and experience.

Users enter salaries/other compensation for a whole or partial year for scholars or participants.

Must recalculate date if calendar boxes are used.

For information on the Grant's Policy Statement, please refer to Section 11.3.7, Initiation of Support, at this web site: [https://grants.nih.gov/grants/policy/nihgps/HTML5/section\\_11/11.3.7\\_initiation\\_of\\_support.htm](https://grants.nih.gov/grants/policy/nihgps/HTML5/section_11/11.3.7_initiation_of_support.htm)

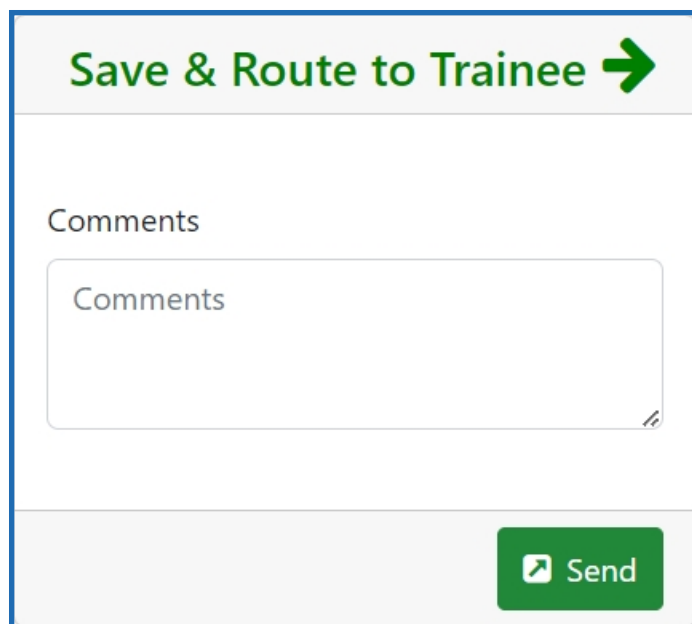
- Click the **Save as Draft** button. A confirmation screen is displayed.



A confirmation screen titled "Review Appointment Form for Save" with a close button (X) in the top right corner. The screen displays two fields: "Trainee" with the value "Curie, Marie" and "Grant Number" with the value "1T23HL456789-38". At the bottom right, there are two buttons: "Go Back and Edit" and a yellow "Save" button with a checkmark icon.

- Click the **Save** button. The draft form is saved and displayed for review; in addition, new options are added to the **Take Action** section.

### Route new appointment to trainee



A form titled "Save & Route to Trainee" with a green arrow icon. Below the title is a "Comments" section with a text input field labeled "Comments". At the bottom right, there is a green "Send" button with a checkmark icon.

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

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

Save & Route to Trainee

Trainee

Curie, Marie

Grant Number

1T23HL456789-38

[Go Back and Edit](#)
[Save & Route to Trainee](#)

- 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 Appointment Form has been successfully routed to the trainee. The status of the appointment is changed to **In-Progress Trainee**.

Appointment Form ?

Success! Curie, Marie Appointment form for Grant number 1T23HL456789-38 is routed to trainee on Tue Mar 21 2023 22:18:11 GMT-0400 (Eastern Daylight Time)

- 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.

Routing History for Curie, Marie

8 Results

Id	Event	Action Taken By		Action Date	Action Taken	Current Status	Current Reviewer	Comments
1	Place 2271 on Hold	Skłodowska, Salomea		12/02/2022 11:52 AM	Placed on Hold by Agency	On Hold by Agency	AGENCY	
2	PI Submits 2271 to Agency	Ulam, Joseph		12/02/2022 11:31 AM	Submitted to Agency	Pending Agency Review	AGENCY	

**NOTE:** Appointments are synchronized into XTRACT. If appointments are made via xTrain, those appointments will be reflected on the RTD in XTRACT.

## Trainee processes form

After receiving an email about the appointment and logging into xTrain, the trainee reviews and completes the necessary information. The trainee then routes the Appointment Form back to the PD/PI.

The system will check the form, and any identified errors must be corrected prior to routing. Warnings may be addressed at your discretion. If no errors are encountered, the appointment status becomes In-Progress PI.

## Complete the appointment

You will receive an email when the trainee has reviewed and completed the form and routed it back to you.

1. In the Awarded Grants table, click the hyperlinked grant number to display the Trainee Roster screen.
2. In the In Progress section of the grant details, click the **Appointments** button.

Select Grants to Display

Years With Pending Forms

1T23HL456789-38

...

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

🕒 In Progress

Appointments 1

Terminations 6

+ Start New

Pre-Doc Months

Overage: 48

Awarded 0

Accepted 48

Post-Doc Months

Remaining: 0

Awarded 0

Accepted 0

Short Term Months

Remaining: 0

Awarded 96

Accepted 0

See Slots

The Pending Appointment Forms screen is displayed.

Pending Appointment Forms for 1T23HL456789-38							
Filter Table	1 Results		1 of 1				
Process Appointment Form For...	Appt. Status	Appt. Type	Appt. Start & End Date	Duration of Appt.	Degree Level	Award Number	PD/PI Institution
<a href="#">Curie, Marie</a>	Grantee	New	03/01/2023 05/31/2023	3 months 0 days	Post-Doc		Skłodowska, Salomea University of Paris

- Click the hyperlinked trainee name to display the Appointment Form screen.

### Appointment Form ?

Details for 1T23HL456789-38

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

**Fiscal Year**  
2022

**Project Period**  
05/01/1980 - 08/31/2025

**Grant Management Specialist**  
[Ulam, Joseph](#)

**Program Official**  
[Rotblat, Stanislaw](#)

#### Process Statement of Training Appointment

Curie, Marie

New Post-Doc In-Progress PI

Prior NRSA Support

Routing History

1 Results

Award #	PD/PI	Appointment Start Date	Appointment End Date	Termination Date	Stipend/Salary Amt	Degree Level	Status
1T23HL456789-38	SKŁODOWSKA, SALOMEA	01/01/2023	02/28/2023	02/28/2023	\$4,392	PRE-DOC	Accepted Appointment

**Period of Appointment**

From: 03/01/2023 To: 05/31/2023

Duration:  
Months: 3 and Days: 0

**Support for Period of Appointment**

Stipend Level or Salary  
0 - 54,840 POST-DOC

Stipend/Salary/Other Compensation  
\$13,710

**Degree(s): Earned/In Progress**

2 Results

Degrees(s)	Completion Date	Major/Minor
BA	✓ 06/2018	Neuroscience
MD	★ 05/2024	N/A

**Trainee Background**

Field of Research Trainings or Career Development Code  
---Epidemiology (134)

Education Level  
Graduate Student

Name of Specialty Boards  
Internal Medicine: Infectious Disease

Dual Degree  
No

**Take Action**

Save Draft

Save as Draft

**Save & Route to Trainee**

Comments

Send

**Route to Agency**

Comments

Submit

- To complete the Appointment, review the form one last time, add comments if desired, then click the **Submit** button in the **Route to Agency** card. A confirmation message displays.

**Route to Agency**

<b>Trainee</b> Schroeder, Julia	<b>Grant Number</b> 5T35HL007690-38
------------------------------------	--

I certify that this individual is qualified for this program and is eligible to receive financial support. The individual being appointed will be able to access this form through xTrain.

[Go Back and Edit](#) [Certify and Route to Agency](#)

- Click the **Certify and Route to Agency** button. The system will validate the information contained in the form and will flag any errors or warnings found. Errors must be corrected before the Appointment is routed. Warnings are corrected at your discretion. A confirmation message is displayed at the top of the screen indicating that the Appointment Form has been successfully routed to the trainee. The status of the appointment is changed to **Pending Agency Review**.

The appointment was successfully submitted to the Agency, and the Agency's grant specialists will be notified. For predoctoral appointments, no further action is required. For NIH postdoctoral Kirschstein-NRSA research training appointments, an original signature is required on the Payback Agreement (6031), and the appointment will not be accepted until the Agency receives the signed forms.

[Payback Agreement Form](#)

In addition to confirming the submission of the appointment, the *Submit to Agency Confirmation* screen provides reminders about any further action that may be needed:

- Pre-doc Appointments – No further action is needed, unless confirmation of permanent residency status is required.
- Post-doc Appointments:
  - For those entering their initial year of Kirschstein-NRSA post-doc support, mail the original signed Payback Agreement (6031) form to the awarding NIH Institute or Center
  - Mail confirmation of permanent residency, if needed

The Agency can accept the appointment, place it on hold, hold it for a paper signature, delete it, view the PDF file, or route it back to the institution.

## Delete an in-progress appointment

---

**IMPORTANT:** Appointments can only be deleted when the status is In Progress PI.

---

1. In the Awarded Grants table, click the hyperlinked grant number to display the Trainee Roster screen.
2. In the Trainee Roster, click the hyperlinked trainee name to open the in-progress appointment.
3. Click the **Delete Appointment** link in the lower-right corner of the screen. A confirmation screen is displayed.
4. Enter comments in the **Comments** field.
5. Click the **Delete** button. The in-progress appointment is deleted.

---

**IMPORTANT:** Deleting appointments cannot be undone. If you wish to appoint a trainee after their appointment has been deleted, you must recreate the appointment from scratch.

---

## Process New Appointment by Trainee

Once the PD/PI creates a new appointment and routes it to the trainee, it is displayed in the My Forms section of the Trainee Appointment Home screen.



### Your Appointment for 1T23HL456789-38

In-Progress Trainee

New

Awarded PD/PI

✉ [SKLODOWSKA, SALOMEA](#)

Appointment Start Date


03/01/2023


Appointment End Date

05/31/2023

Stipend Amount

\$13,710.00

View Form 

Go to Form 

1. To view a PDF of the Appointment Form, click the **View Form** button. The PDF is downloaded to the browser's default location.
2. To complete the appointment form, click the **Go to Form** button. The Appointment Form screen is displayed for your review.

### Appointment Form ?

Details for 1T23HL456789-38 ...

<b>Budget Period</b> 09/01/2022 - 08/31/2023	<b>Fiscal Year</b> 2022	<b>Project Period</b> 05/01/1980 - 08/31/2025	<b>Grant Management Specialist</b> ✉ <a href="#">Ulam, Joseph</a>	<b>Program Official</b> ✉ <a href="#">Rotblat, Stanislaw</a>
---	----------------------------	--	--	---

Process Statement of Training Appointment

Curie, Marie ...

**New** **Post-Doc** **In-Progress Trainee**

Prior NRSA Support    Routing History

1 Results

Award #	PD/PI	Appointment Start Date	Appointment End Date	Termination Date	Stipend/Salary Amt	Degree Level	Status
1T23HL456789-38	SKLODOWSKA, SALOMEA	01/01/2023	02/28/2023	02/28/2023	\$4,392	PRE-DOC	Accepted Appointment

**Period of Appointment**

**From:** 03/01/2023

**To:** 05/31/2023

**Duration:**  
Months: 3 and Days: 0

**Support for Period of Appointment**

**Stipend Level or Salary \***  
0 - 54,840 POST-DOC

**Stipend/Salary/Other Compensation \***  
\$13,710

**Degree(s): Earned/In Progress**

2 Results

Degrees(s) ⇅	Completion Date ⇅	Major/Minor ⇅
BA	✓ 06/2018	Neuroscience
MD	★ 05/2024	N/A

**Trainee Background**

**Field of Research Trainings or Career Development Code \*** ---Epidemiology (134)

**Education Level \*** Graduate Student

**Name of Specialty Boards** Internal Medicine: Infectious Disease

**Dual Degree \*** No

Take Action

Save Draft

Save as Draft

Save & Route to PI

**Comments \***

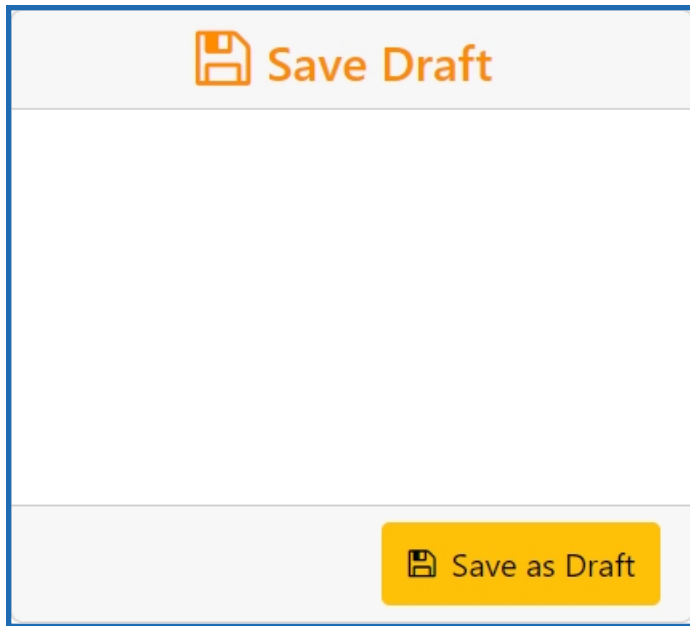
Send

### 3. Edit the form as appropriate.

Prior Kirschstein-NRSA Support information is pulled from the profile. To correct or update this information, contact the [eRA Service Desk](#).

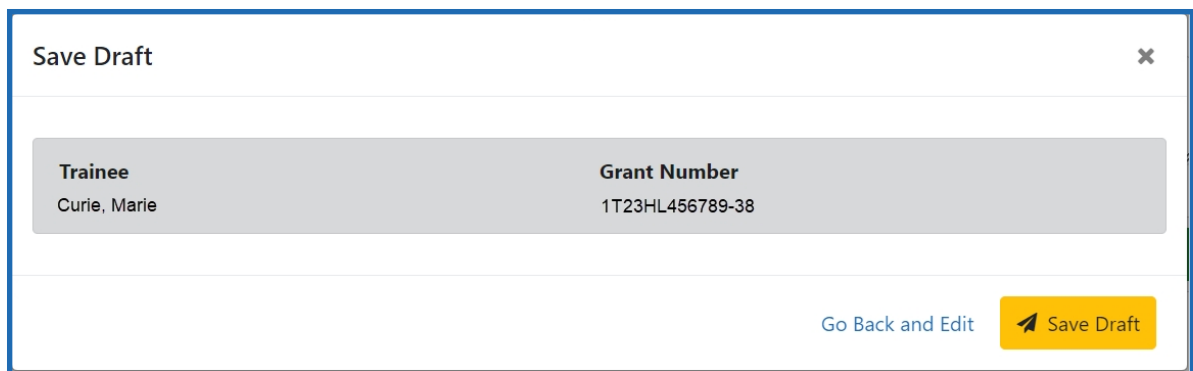
## Save Draft

Use this option to save your work on an appointment form and keep it in your queue.

A dialog box with a light gray header containing a floppy disk icon and the text "Save Draft". The main area is white and empty. The footer is light gray and contains a yellow button with a floppy disk icon and the text "Save as Draft".

Save Draft	
<a href="#">Save as Draft</a>	

1. Make the appropriate edits to the form.
2. Click the **Save as Draft** button. A confirmation message displays.

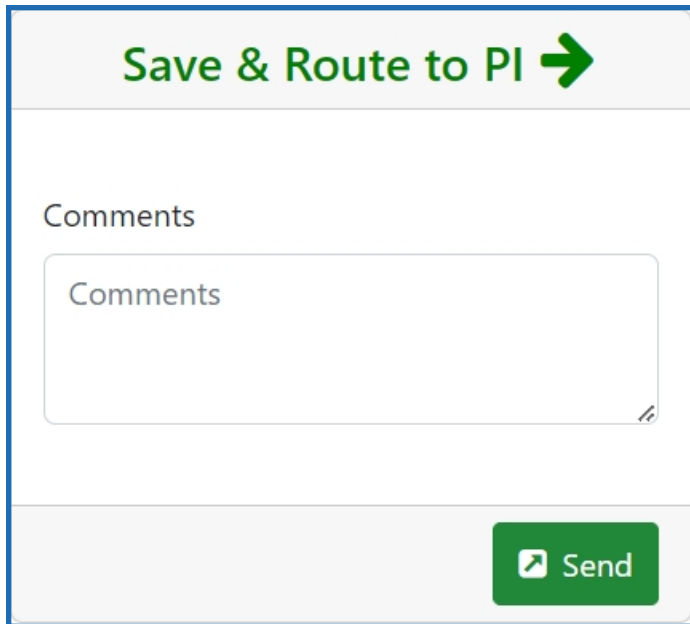
A confirmation message box titled "Save Draft" with a close button (X) in the top right corner. It displays the trainee's name "Curie, Marie" and the grant number "1T23HL456789-38". At the bottom, there is a link "Go Back and Edit" and a yellow button with a floppy disk icon and the text "Save Draft".

Save Draft	
<b>Trainee</b> Curie, Marie	<b>Grant Number</b> 1T23HL456789-38
<a href="#">Go Back and Edit</a> <a href="#">Save Draft</a>	

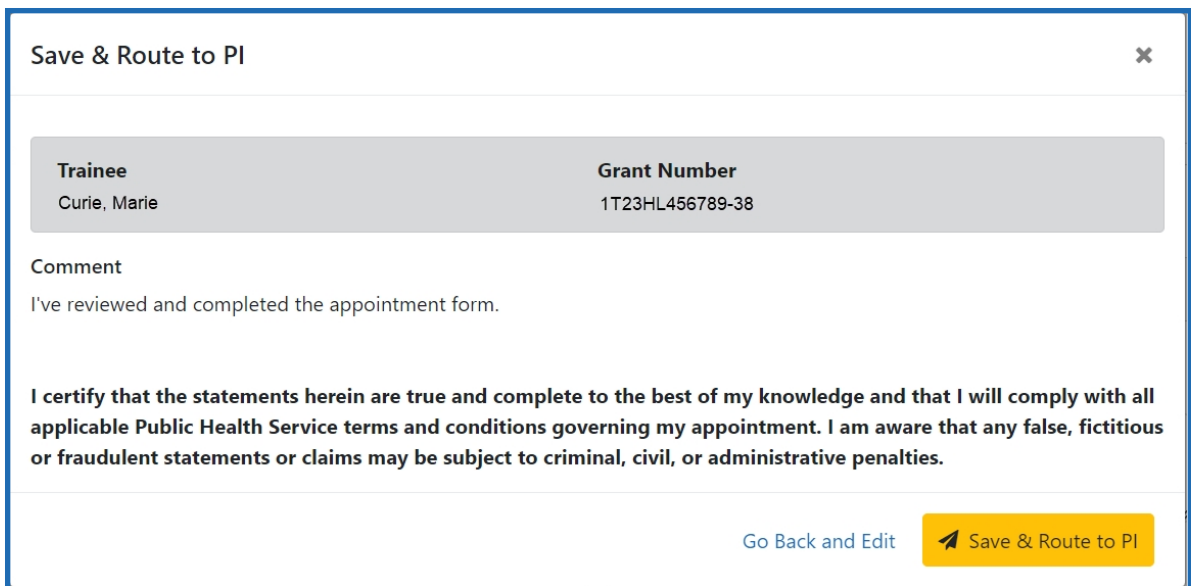
3. Click the **Save** button. Your edits are saved and the form remains in your queue.

## Save & Route to PI

When you have completed and reviewed the form, use this option to return the form to the PD/PI for processing.

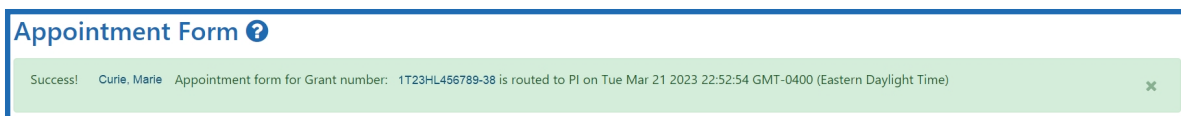


1. Make the appropriate edits to the form.
2. Add comments to the **Comments** field if desired.
3. Click the **Send** button. A confirmation message displays.



4. Click the **Save & Route to PI** button. The system will validate the information contained in the form and will flag any errors or warnings found. Errors must be

corrected before the Appointment is routed. Warnings are corrected at your discretion. A confirmation message is displayed at the top of the screen indicating that the Appointment Form has been successfully routed to the PI. The status of the appointment is changed to **In-Progress PI**.



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.

Process Statement of Training Appointment

Curie, Marie ...

New Post-Doc In-Progress PI

Prior NRSA Support Routing History

3 Results

					Current Status		
	Id Event	Action Taken By	Action Date	Action Taken		Current Reviewer	Comments
1	Trainee Routes 2271 to PI	Curie, Marie	03/21/2023 10:52 PM	Routed to PI	In-Progress PI	SKŁODOWSKA, SALOMEA	I've reviewed and co... <a href="#">Show more</a>
2	PI Routes 2271 to Trainee	SKŁODOWSKA, SALOMEA	03/21/2023 10:18 PM	Routed to Trainee	In-Progress Trainee	Curie, Marie	
3	PI Initiates, Amends, or Re-appoints a Trainee via 2271	SKŁODOWSKA, SALOMEA	03/21/2023 10:02 PM	Initiated by PI	In-Progress PI	SKŁODOWSKA, SALOMEA	

## Create an Amendment

Once an appointment is accepted by the Agency, an amendment is required in order to change any of the following items:

- Name
- Permanent Mailing Address
- Appointment Period
- Support from the Grant

**NOTE:** Some changes, such as name or mailing address, will also need to be updated by the Trainee under Personal Profile within eRA Commons.

You must be a PD/PI or Delegate (ASST) to amend a 2271.

**NOTE:** Only appointments can be amended. Fellowships cannot be amended.

## Create an Amendment

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.

Filter Table

25 Results

<

1 of 1

>

Trainee Name	Appointment Status	Termination Status	Appt Type	Appt Start	Appt End	Termination Date	Num of Months And Days	Degree Level	
5T35HL007690-38									
<a href="#">Skłodowska, Salomea</a>	***	<div>✓</div>	<div>In Progress BIO</div>	<div>New</div>	01/01/2023	02/28/2023	02/28/2023	2 months 0 days	<div>Pre-Doc</div>
Curie, Marie	***	<div>✓</div>	<div>New</div>	01/01/2023	02/28/2023		2 months 0 days	<div>Pre-Doc</div>	


View Appointment Form

View Routing History

Create Service Desk Ticket

Amend

Initiate Termination Notice

3. Click the  **Actions** button and select **Amend**. The Appointment Form screen is displayed.

### Appointment Form

Details for 1T23HL456789-38 ...

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

▶ Slot Data

Process Statement of Training Appointment

Curie, Marie

Amend. Pre-Doc ✓

Prior NRSA Support

0 Results

Award #	PD/PI	Appointment Start Date	Appointment End Date	Termination Date	Stipend/Salary Amt	Degree Level	Status
No records found							

**Period of Appointment**

**From:** 02/01/2023

**To:** 03/31/2023

**Duration:**  
Months: 2 and Days: 0

**Support for Period of Appointment**

**Stipend Level or Salary \***  
PRE ALL - 26,352 PRE-DOC ✕ ▾

**Stipend/Salary/Other Compensation \***  
\$4,392

**Degree(s): Earned/In Progress**

2 Results

Degrees(s)	Completion Date	Major/Minor
AB	✓ 05/2018	Environmental Studies
MD	★ 05/2024	N/A

**Trainee Background**

<b>Field of Research Trainings or Career Development Code *</b> ---Health Sciences, General (298) ▾	<b>Education Level *</b> Graduate Student ▾	<b>Name of Specialty Boards</b> Internal Medicine: Infectious Disease	<b>Dual Degree *</b> No ▾
--	--	--	------------------------------

Take Action

Save Draft

Save as Draft

Cancel

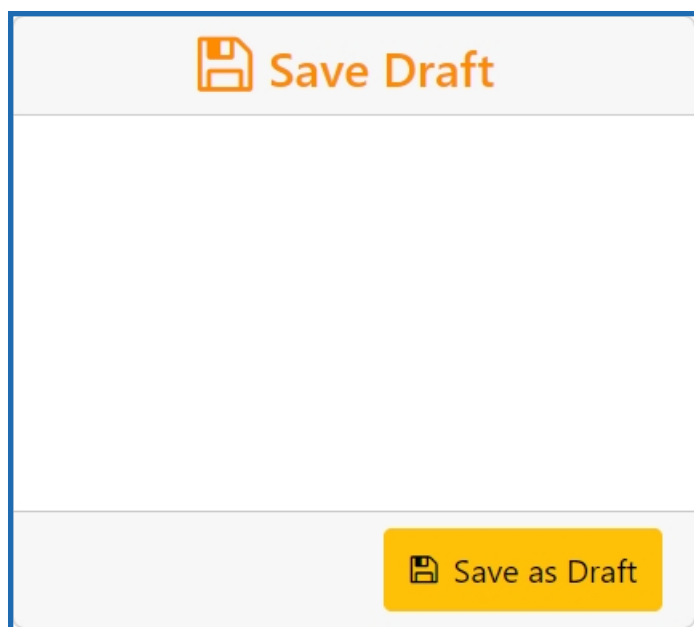
**NOTE:** If a Kirschstein-NRSA research training appointment is ending earlier than initially planned, the PD/PI should initiate a Termination, which will automatically amend the appointment and capture the new end date.

For institutional career development and other non-NRSA appointments ending early, the PD/PI should document the new appointment end date by amending the appointment, unless specifically instructed to use the Termination Notice by the NIH

awarding Institute and/or Center (IC). Refer to the *Terminating Institutional Research Training Programs* on page 80topic for additional information.

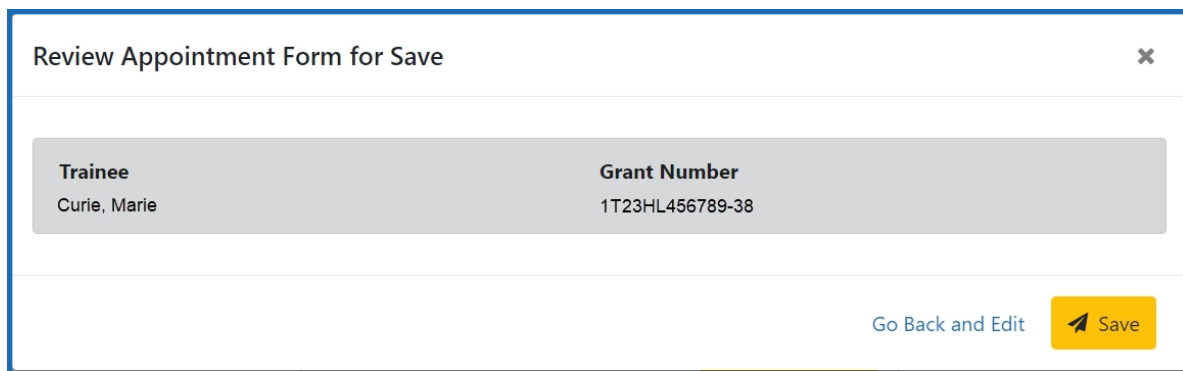
4. Make the desired updates.

## Save Draft



A dialog box titled "Save Draft" with a floppy disk icon. It has a large white area in the center and a yellow button at the bottom right labeled "Save as Draft" with a floppy disk icon.

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



A confirmation dialog box titled "Review Appointment Form for Save" with a close button (X) in the top right corner. It contains a table with the following information:

Trainee	Grant Number
Curie, Marie	1T23HL456789-38

At the bottom right, there are two buttons: "Go Back and Edit" and a yellow "Save" button with a floppy disk icon.

2. Click the **Save** button. Your edits are saved and the form remains in your queue.

Once the draft amendment has been saved, it follows the same process as appointments:

1. PD/PI routes amendment to trainee



2. Trainee reviews and routes amendment to PD/PI
3. PD/PI reviews and routes amendment to Agency
4. Agency reviews and approves amendment.

Review the *Create New Appointment by PD/PI* on page 57 and *Process New Appointment by Trainee* on page 67 topics for more information.

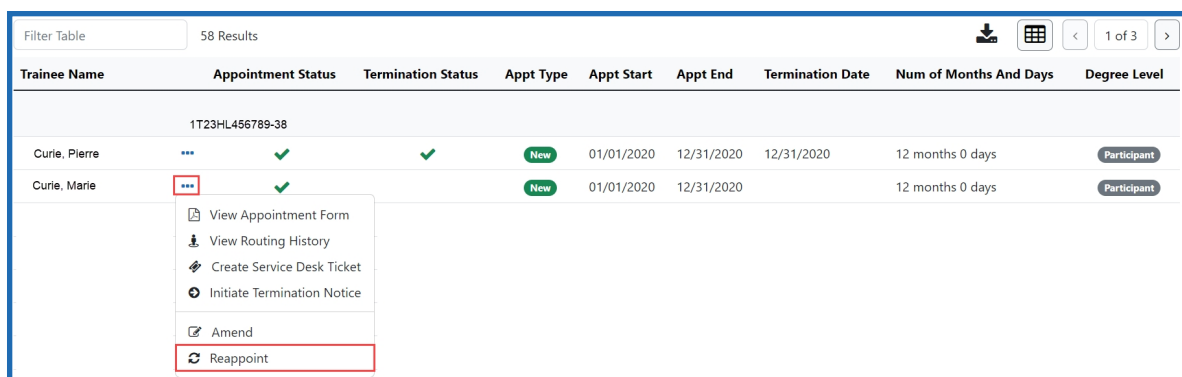
## Initiate a Reappointment by PD/PI

Trainees whose appointments are coming to an end can be reappointed to grants that have future award years.

**NOTE:** If the preceding appointment was submitted via a paper form, then a new appointment has to be completed rather than a reappointment.


**NOTE:** If a trainee takes unpaid leave, their termination notice must be accepted by agency before a reappointment can be initiated.

1. In the Awarded Grants table, click the hyperlinked grant number to display the Trainee Roster screen.
2. Locate the trainee you wish to reappoint. The **Filter table** field can be used to locate someone quickly if desired.



The screenshot shows the 'Trainee Roster' screen. At the top, there is a 'Filter Table' input field and a '58 Results' indicator. Below this is a table with columns: Trainee Name, Appointment Status, Termination Status, Appt Type, Appt Start, Appt End, Termination Date, Num of Months And Days, and Degree Level. Two trainees are listed: 'Curie, Pierre' and 'Curie, Marie'. The 'Curie, Marie' row has a red box around the three-dot 'Actions' button. A dropdown menu is open for this button, showing options: 'View Appointment Form', 'View Routing History', 'Create Service Desk Ticket', 'Initiate Termination Notice', 'Amend', and 'Reappoint'. The 'Reappoint' option is highlighted with a red box.

Trainee Name	Appointment Status	Termination Status	Appt Type	Appt Start	Appt End	Termination Date	Num of Months And Days	Degree Level
1T23HL456789-38								
Curie, Pierre	...	✓	New	01/01/2020	12/31/2020	12/31/2020	12 months 0 days	Participant
Curie, Marie	...	✓	New	01/01/2020	12/31/2020		12 months 0 days	Participant


3. Click the  **Actions** button and select **Reappoint**. The Appointment Form screen is displayed with some fields pre-populated with data from the system.

### Appointment Form

Details for 1T23HL456789-38 ...

<b>Budget Period</b> 01/01/2020 - 12/31/2020	<b>Fiscal Year</b> 2020	<b>Project Period</b> 09/15/2014 - 12/31/2023	<b>Grant Management Specialist</b> ✉ Ulam, Joseph	<b>Program Official</b> ✉ Rotblat, Stanislaw
---	----------------------------	--	--	---

Process Statement of Training Appointment

 Curie, Marie  
 Reappt. Participant ✓

Prior NRSA Support

1 Results

Award #	PD/PI	Appointment Start Date	Appointment End Date	Termination Date	Stipend/Salary Amt	Degree Level	Status
1T23HL456789-38	Skłodowska, Salomea	01/01/2020	12/31/2020			PARTICIPANT	Accepted Appointment

#### Period of Appointment

Which year are you reappointing to? \*

Select One .. ✕ ▼

From: 01/01/2020 To: 12/31/2020

Duration:  
Months: 12 and Days: 0

#### Support for Period of Appointment

Stipend Level or Salary \*

Participant ✕ ▼

Stipend/Salary/Other Compensation \*

\$0

#### Degree(s): Earned/In Progress

3 Results

Degrees(s)	Completion Date	Major/Minor
BA	✓ 05/2003	English/ Spanish
MA	✓ 05/2005	Communication
PHD	✓ 08/2012	Health Communication

#### Trainee Background

Field of Research Trainings or Career Development Code: ---Health and Behavior (280) ▼

Education Level \*: Select Education Level ▼

Name of Specialty Boards: Begin typing and choose one

Dual Degree \*: No ▼

Take Action

Save Draft

Save as Draft

Cancel

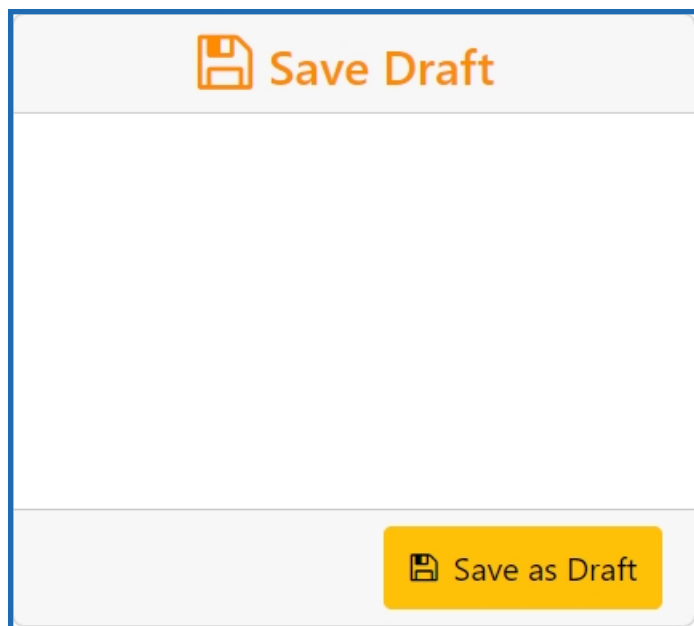
- Complete the Appointment Form. Required fields are marked with a red asterisk (\*).

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

- The **FROM** date should be within the budget period of the grant for the reappointment.
- The format of the date fields is MM/DD/YYYY.

3. For partial years, the stipend amount can be adjusted. No commas or decimals are allowed in the **Stipend Amount** field.

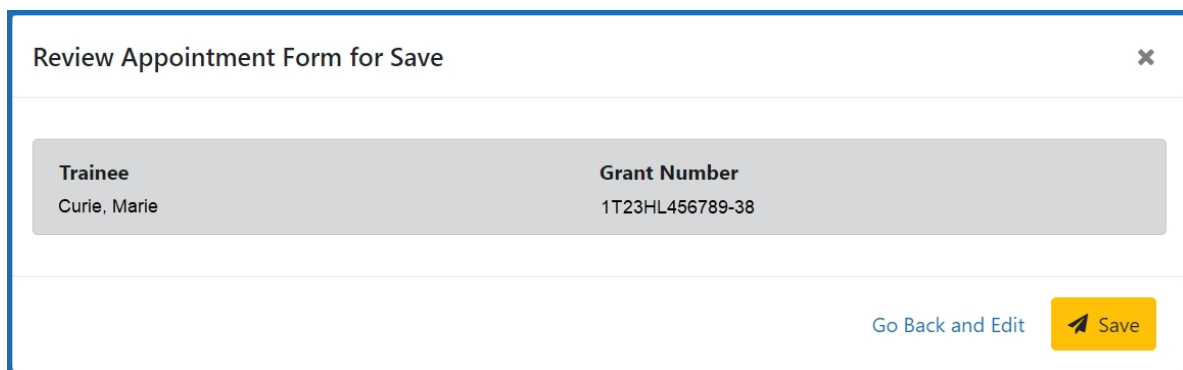
## Save Draft

A dialog box with a light gray header containing an orange floppy disk icon and the text "Save Draft". The main body is white and empty. The footer is light gray and contains a yellow button with a floppy disk icon and the text "Save as Draft".

Save Draft

Save as Draft

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

A confirmation dialog box titled "Review Appointment Form for Save" with a close button (X) in the top right. The main content area has a light gray background and displays the following information:

Trainee	Grant Number
Curie, Marie	1T23HL456789-38

At the bottom right, there are two buttons: "Go Back and Edit" in blue text and a yellow button with a floppy disk icon and the text "Save".

Review Appointment Form for Save

Trainee: Curie, Marie

Grant Number: 1T23HL456789-38

Go Back and Edit Save

2. Click the **Save** button. Your edits are saved and the form remains in your queue.

Once the reappointment has been saved, it follows the same process as appointments:

1. PD/PI routes reappointment to trainee
2. Trainee reviews and routes reappointment to PD/PI

3. PD/PI reviews and routes reappointment to Agency
4. Agency reviews and approves reappointment .

Review the *Create New Appointment by PD/PI* on page 57 and *Process New Appointment by Trainee* on page 67 topics for more information.

## Terminating Institutional Research Training Programs

The Termination Notice documents the termination of NRSA fellowships and appointments to NRSA training grants.

It may also be used to document the termination of appointments to non-NRSA institutional research training programs (e.g., NLM T15's), research education awards (e.g., R25), and institutional career development awards (e.g., K12).

For non-NRSA awards, please refer to the Funding Opportunity Announcement or Notice of Award to determine whether a termination notice is required.

Note that the flow below is for institutional research training programs. The flow for terminating fellowships, career development awards, and research education awards, if applicable, differs.

Quick Reference: <https://www.era.nih.gov/files/Initiating%20a%20Termination%20QRG.pdf>

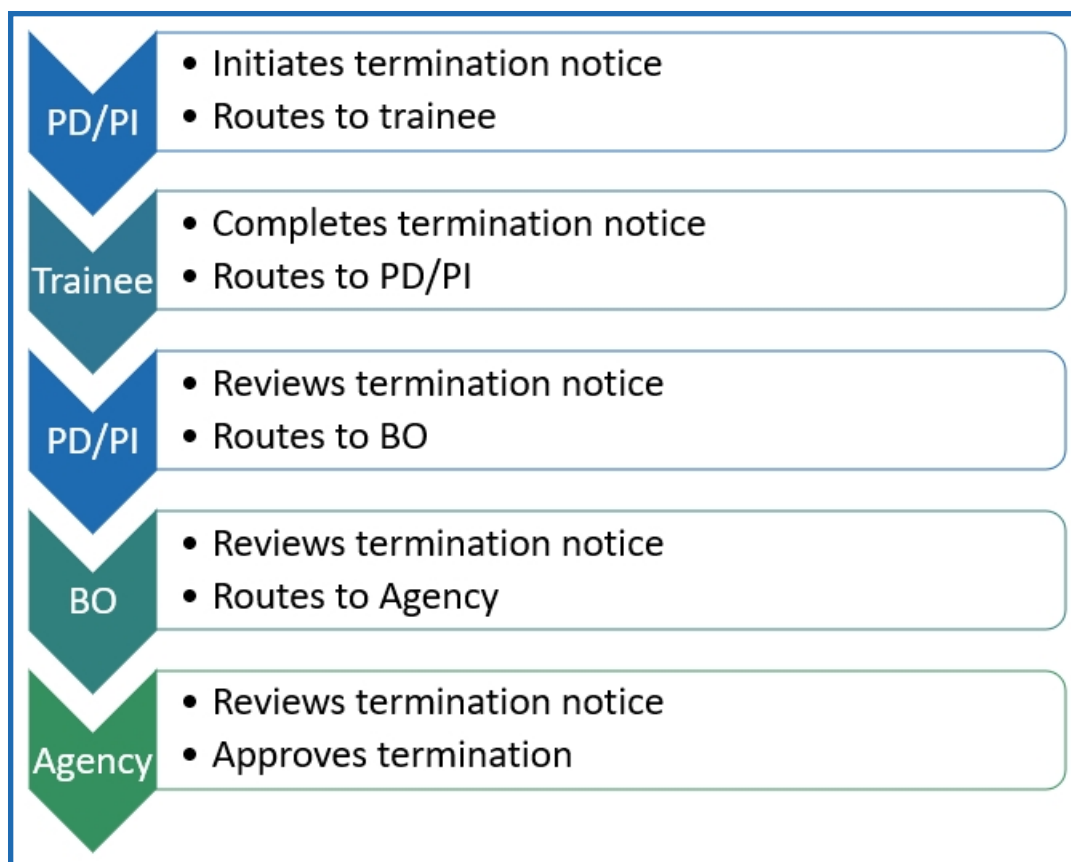


Figure 5: Termination Process Flow

## Who Can Initiate/Submit Termination Notices

xTrain users with the following eRA Commons roles can initiate a termination notice:

- Principal Investigator (PI) – this role includes Fellows
- Assistant (ASST) with a PD/PI xTrain-delegated role
- Business Official (BO)
- Sponsor (for fellowships)
- Sponsor Delegate (for fellowships)

Only the BO can submit a Termination Notice (TN) to the Agency for NRSA appointments and fellowships.

Only the PD/PI can submit a Termination Notice for career development awards (e.g. K12, KL2, and KM1) and research education awards (e.g. R25, R90). The BO is not involved.

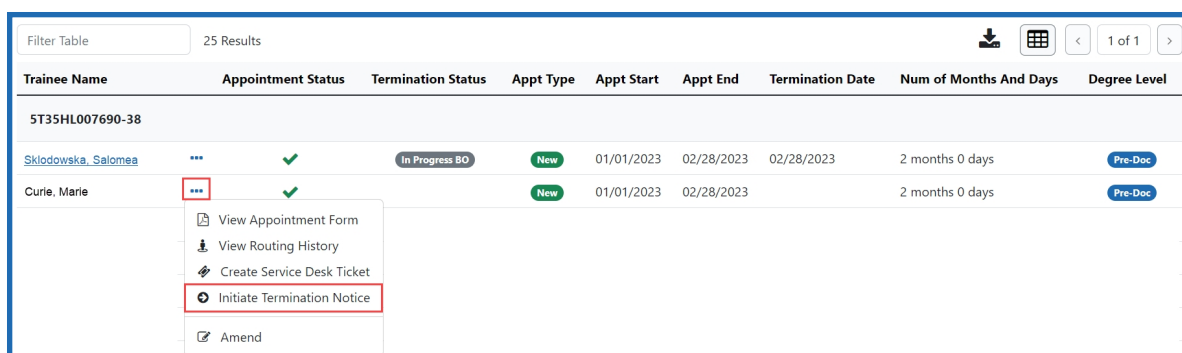
For Federal and Foreign fellowships, the PD/PI (Fellow), and the Sponsor can submit the Termination Notice. For more information see Appendix B – Termination Notice (416-7 Form).

## Initiate a New Termination by PD/PI

PD/PIs are responsible for initiating new terminations for funded budget periods.

### 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.



Trainee Name	Appointment Status	Termination Status	Appt Type	Appt Start	Appt End	Termination Date	Num of Months And Days	Degree Level
5T35HL007690-38								
<a href="#">Skłodowska, Salomea</a>	***	✓	In Progress BIO	New	01/01/2023	02/28/2023	02/28/2023	2 months 0 days
Curie, Marie	***	✓	New	New	01/01/2023	02/28/2023	02/28/2023	2 months 0 days


View Appointment Form

View Routing History

Create Service Desk Ticket

**Initiate Termination Notice**

Amend

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  
09/01/2022 - 08/31/2023

Fiscal Year  
2022

Project Period  
05/01/1980 - 08/31/2025

Grant Management Specialist  
✉ [Ulam, Joseph](#)


Program Official  
✉ [Rotblat, Stanislaw](#)


 Curie, Marie ...

Termination PRE-DOC

Total NRSA Support Under This Award   Degree   Routing History

Termination Date: \*   Business Official: \*

02/28/2023 


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	<span>Accepted</span>

Totals: \$4,392

🔖 Other Relevant PHS ⓘ

Currently participating in NIH Loan Repayment Program 

National Health Service Corps Scholarship \*

Number of Months

Kirschstein-NRSA \*

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  
Select one ▾

Organization  
Select one ▾

Type of Position  
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

Terminati

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](http://grants.nih.gov/grants/funding/416/phs416-7.pdf).

---

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

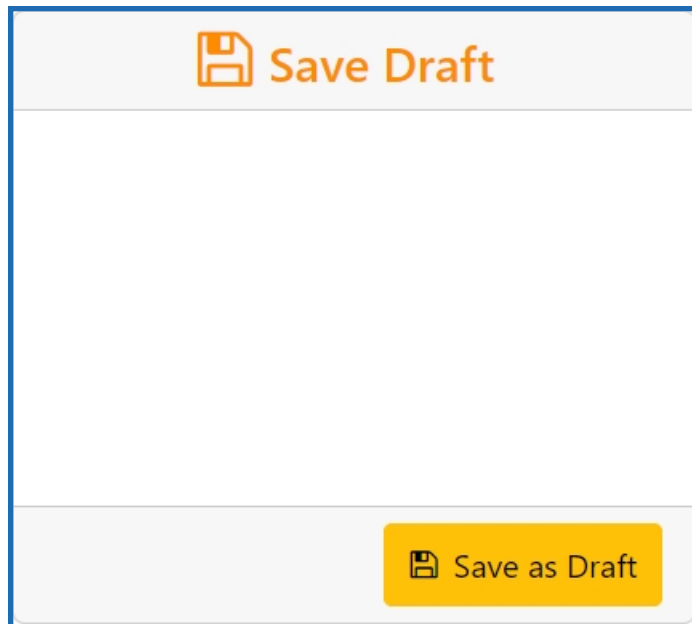
1. The Termination Date format is MM/DD/YYYY.
2. No commas or decimals are allowed in the Amount of Stipend/Salary field.
3. All comment text boxes are limited to 2000 characters.
4. Only the business official can submit the Termination Notice to the Agency for NRSA appointments and fellowships. For 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.
5. 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 as well.

---

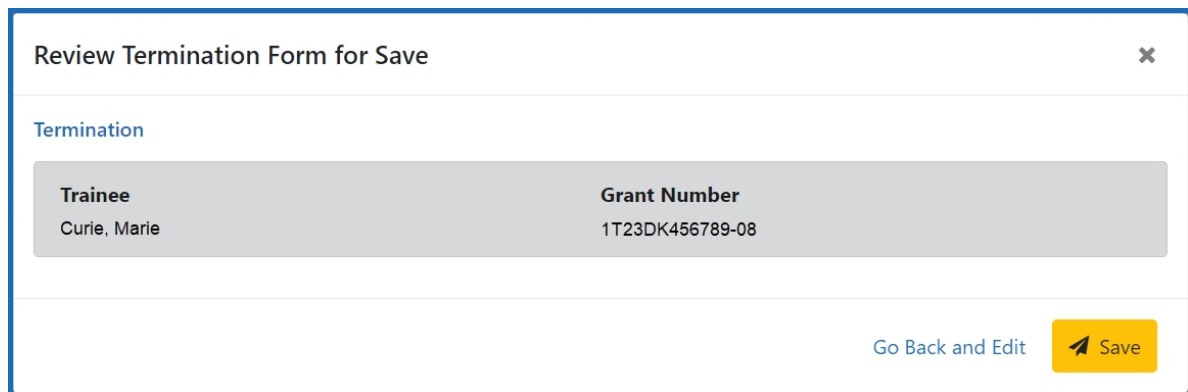
**IMPORTANT:** You must select the name of the business official (BO) who will submit the termination notice to the agency.

---

## Save Draft

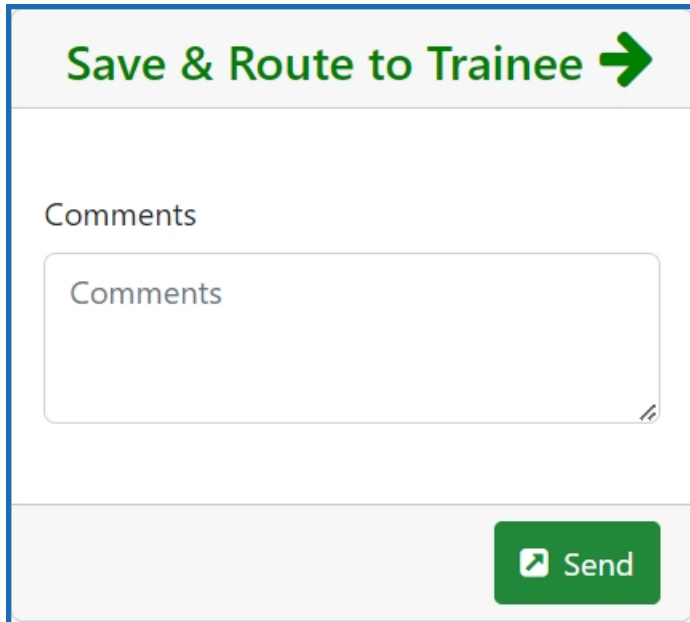
A dialog box with a light gray header bar containing an orange floppy disk icon and the text "Save Draft" in orange. The main area is white. At the bottom right, there is a yellow button with a black floppy disk icon and the text "Save as Draft" in black.

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

A confirmation dialog box titled "Review Termination Form for Save" with a close button (X) in the top right corner. Below the title is a section labeled "Termination" in blue. It contains a table with two columns: "Trainee" and "Grant Number". The "Trainee" column shows "Curie, Marie" and the "Grant Number" column shows "1T23DK456789-08". At the bottom right, there are two buttons: "Go Back and Edit" in blue text and a yellow "Save" button with a black arrow icon.

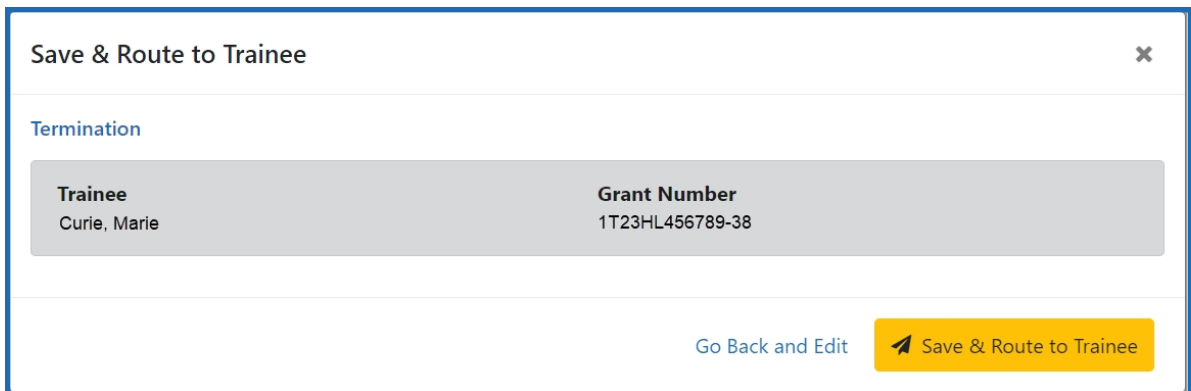
2. Click the **Save** button. Your edits are saved and the form remains in your queue. The draft form is saved and displayed for review; in addition, new options are added to the **Take Action** section.

## Route new termination to trainee



The screenshot shows a form titled "Save & Route to Trainee" with a green arrow icon. Below the title is a "Comments" section with a text input field labeled "Comments". At the bottom right of the form is a green "Send" button with a paper plane icon.

1. Add comments to the **Comments** field if desired.
2. Click the **Send** button. A confirmation message displays.



The screenshot shows a confirmation message box titled "Save & Route to Trainee" with a close button (X). The message displays the following information:

Termination	
<b>Trainee</b> Curie, Marie	<b>Grant Number</b> 1T23HL456789-38


At the bottom right of the message box are two buttons: "Go Back and Edit" and "Save & Route to Trainee" (highlighted in yellow).

3. 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)

- 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.

<div>  <div>Curie, Marie ***</div> <div> <span>Termination</span> <span>PRE-DOC</span> <span>In Progress Trainee</span> </div> </div>						
<div> <div>Total NRSA Support Under This Award</div> <div>Degree</div> <div>Routing History</div> </div>						
9 Results						
Id Event		Action Taken By	Action Date	Action Taken	Current Status	Current Reviewer
1	PI Routes TN to Trainee	SKLODOWSKA, SALOMEA	03/22/2023 5:29 PM	Routed to Trainee	In Progress Trainee	Curie, Marie
2	PI Initiates TN	SKLODOWSKA, SALOMEA	03/22/2023 5:25 PM	Initiated by PI	In Progress PI	SKLODOWSKA, SALOMEA

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

## Trainee processes form

After receiving an email about the termination and logging into xTrain, the trainee reviews and completes the necessary information. The trainee then routes the Termination Notice back to the PD/PI.

The system will check the form, and any identified errors must be corrected prior to routing. Warnings may be addressed at your discretion. If no errors are encountered, the termination status becomes In-Progress PI.

## Complete the termination

You will receive an email when the trainee has reviewed and completed the notice and routed it back to you.

- In the Awarded Grants table, click the hyperlinked grant number to display the Trainee Roster screen.
- In the In Progress section of the grant details, click the **Terminations** button.

Select Grants to Display

Years With Pending Forms

1T23HL456789-38

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

In Progress

Appointments 1Terminations 6

+ Start New

Pre-Doc Months

Awarded 0

Accepted 48

Overage: 48

Post-Doc Months

Awarded 0

Accepted 0

Remaining: 0

Short Term Months





Awarded 96

Accepted 0

Remaining: 0

See Slots

The Pending Terminations Forms screen is displayed.

Pending Termination Forms for 1T23HL456789-38								
Filter Table	7 Results	   1 of 1 						
Process Termination Notice For...	Termination Status	Appt. Start & End Date	Termination Date	Duration of Appt.	Degree Level	Award Number	PD/PI	Institution
<a href="#">Curie, Marie</a>	In Progress PI	01/01/2023 02/28/2023	02/28/2023	2 months 0 days	Pre-Doc	1T23HL456789-38	Skłodowska, Salomea	University of Paris

- Click the hyperlinked trainee name to display the Termination Notices screen.

Termination Notices ?

Details for 1T23HL456789-38

Pending Appointments0

Pending Terminations7

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 PI

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
1917625	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

✕

▼

Organization

Academic

✕

▼

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 Trainee ➔

Comments

Comments

Send

Route to Business Official ➔

Comments

Comments

Send

Terminati

- To complete the termination, review the form one last time, add comments if desired, then click the **Send** button in the **Route to Business Official** card. A confirmation message displays.

Save & Route to BO

Termination

<b>Trainee</b>	<b>Grant Number</b>
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](#)

- Click the **Save and Route to BO** button. The system will validate the information contained in the form and will flag any errors or warnings found. Errors must be corrected before the termination is routed. Warnings are corrected 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 BO. The status of the appointment is changed to **In Progress BO**.

Termination Notices

Success! Termination form for Grant number: 1T23HL456789-38 is routed to BO on Wed Mar 22 2023 20:00:23 GMT-0400 (Eastern Daylight Time)

## Delete an in-progress termination

### IMPORTANT:

Terminations can only be deleted when the status is In Progress PI.

- In the Awarded Grants table, click the hyperlinked grant number to display the Trainee Roster screen.
- In the Trainee Roster, click the hyperlinked trainee name to open the in-progress termination.



3. Click the **Delete Termination** link in the lower-right corner of the screen. A confirmation screen is displayed.
4. Enter comments in the **Comments** field.
5. Click the **Delete** button. The in-progress termination is deleted.

---



**IMPORTANT:** Deleting terminations cannot be undone. If you wish to terminate a trainee after their termination has been deleted, you must recreate the termination notice from scratch.

---

## Process Termination Notice by Trainee

Once the PD/PI creates a new appointment and routes it to the trainee, it is displayed in the My Forms section of the Trainee Appointment Home screen.

### Your Termination for 1T23HL456789-38

<b>In Progress Trainee</b>	<b>Awarded PD/PI</b> ✉ <a href="#">SKLODOWSKA, SALOMEA</a>
<b>Appointment Start Date</b> 01/01/2023	<b>Termination Date</b> 02/28/2023
<b>Stipend Amount</b> \$4,392.00	
<a href="#">View Form</a> 	<a href="#">Go to Form</a> 

## Open the Termination Notice

1. To view a PDF of the Termination Notice, click the **View Form** button. The PDF is downloaded to the browser's default location.

2. To complete the termination notice, click the **Go to Form** button. The Termination Notices screen is displayed for your review.

Termination Notices ?

Details for 1T23HL456789-38

Budget Period	Awarded PD/PI	Project Title	Institution
09/01/2022 - 08/31/2023	✉ SKŁODOWSKA, SALOMEA	Long-Term Effects of Radium Exposure on Nearby Inhabitants	UNIVERSITY OF PARIS



Curie, Marie

TerminationPRE-DOCIn Progress Trainee

Total NRSA Support Under This Award Degree Routing History

Termination Date: \*02/28/2023

Business Official: \*Debora L. Talley

1 Results

Id	Support		Start Date	End Date	Termination Date	Amount of Stipend/Salary	Standard Stipend Amount	Specialty Funding	Number of Months/Days	Status
	Year									
1917625	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)

+ Choose

Only pdf format, 6 MB maximum allowed

Post Award Details

Activity

Select one

If other, please describe

Organization

Select one

If other, please describe

Type of Position

Select one

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 & Route to PI

Comments

Comments

Save as Draft

Send

Terminati

## Complete the Termination Notice

1. Complete the form as appropriate. Required fields are marked with a red asterisk (\*).
2. Enter details about the training in the **Summary Comments** field of the **Training Received** section.
3. If desired, attach a PDF in the **Supporting Documentation** section. Click the **Choose** button, navigate to the file's location, and double-click the file to attach it. Only one file can be uploaded.

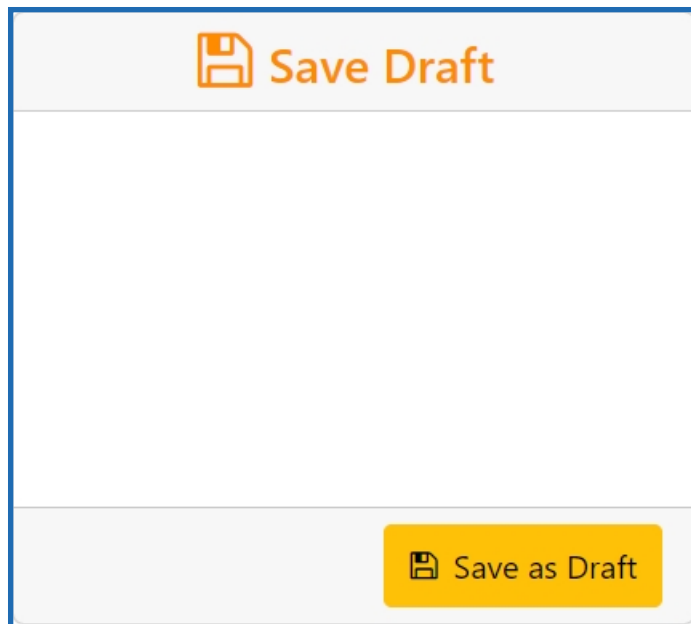
---

**IMPORTANT:** Your mailing and email address must be ones where you can be reached after your training has been terminated.

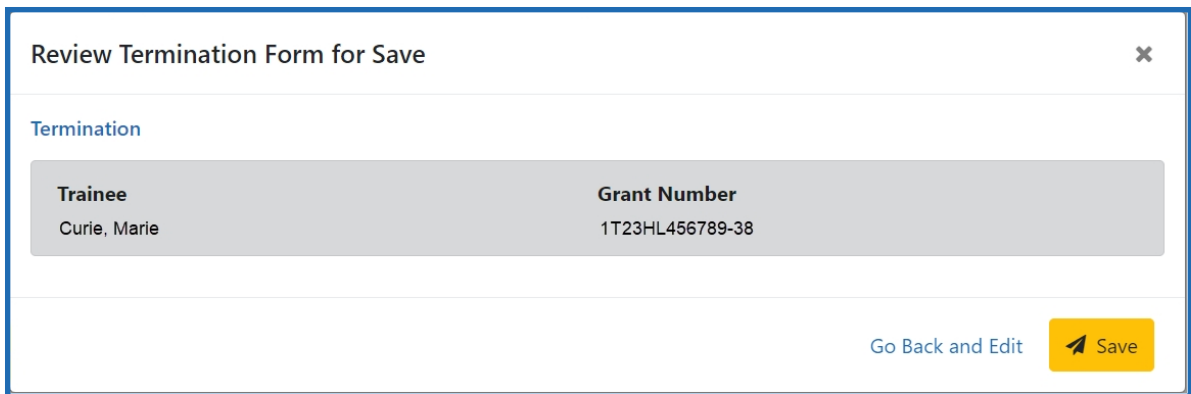
---

## Save Draft

Use this option to save your work on an termination notice and keep it in your queue.



1. Make the appropriate edits to the form.
2. Click the **Save as Draft** button. A confirmation message displays.



A screenshot of a web form titled "Review Termination Form for Save" with a close button (X) in the top right corner. Below the title is a section labeled "Termination". Inside this section is a table with two columns: "Trainee" and "Grant Number". The "Trainee" column contains the text "Curie, Marie" and the "Grant Number" column contains "1T23HL456789-38". At the bottom right of the form, there are two buttons: "Go Back and Edit" (a blue text link) and "Save" (a yellow button with a pencil icon).

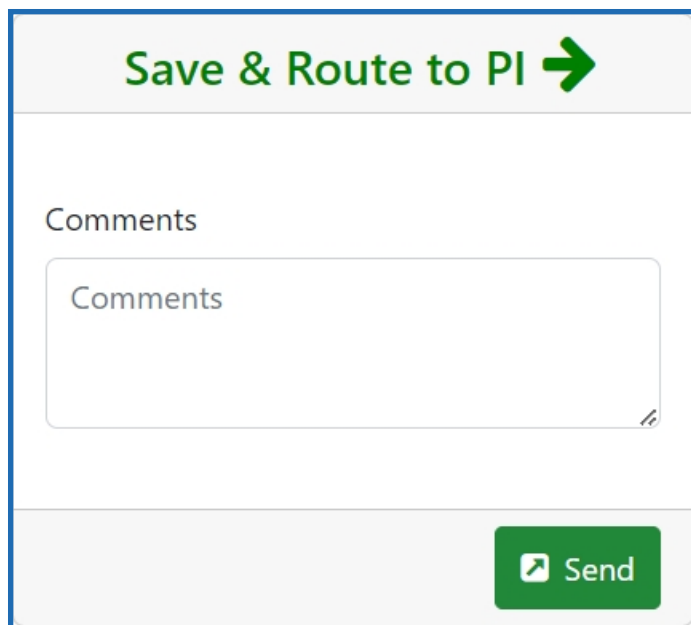
Trainee	Grant Number
Curie, Marie	1T23HL456789-38

[Go Back and Edit](#) [Save](#)

3. Click the **Save** button. Your edits are saved and the form remains in your queue.

## Save & Route to PI

When you have completed and reviewed the form, use this option to return the form to the PD/PI for processing.



A screenshot of a web form titled "Save & Route to PI" with a green arrow icon. Below the title is a section labeled "Comments". Inside this section is a text input field with the placeholder text "Comments". At the bottom right of the form, there is a green button with a white paper plane icon and the text "Send".

**Save & Route to PI**

Comments

Comments

[Send](#)

1. Make the appropriate edits to the form.
2. Add comments to the **Comments** field if desired.
3. Click the **Send** button. A confirmation message displays.

Save & Route to PI

Termination

<b>Trainee</b>	<b>Grant Number</b>
Curie, Marie	1T23HL456789-38

In signing this form, I certify that the statements therein are true and complete to the best of my knowledge. Willful provision of false information is a criminal offense (U.S. Code, Title 18, Section 1001). I am aware that any false, fictitious, or fraudulent statement may, in addition to other remedies available to the Government, subject me to civil penalties under the Program Fraud and Civil Remedies Act of 1986 (45 CFR Part 79). Also, if I have a payback obligation, I understand that payback service must begin within 2 years of terminating my Kirschstein-NRSA support; otherwise, financial payback becomes due, unless an extension of the 2-year service initiation period or a waiver of the obligation is awarded. I also understand that if I fail to repay both principal and interest, the Federal Government will take authorized actions to collect the debt.

Go Back and Edit


Save & Route to PI

- Click the **Save & Route to PI** button. The system will validate the information contained in the form and will flag any errors or warnings found. Errors must be corrected before the Termination is routed to the PI. Warnings are corrected at your discretion. A confirmation message is displayed at the top of the screen indicating that the Termination Form has been successfully routed to the PI. The Trainee's electronic signature is recorded and the status of the appointment is changed to **In-Progress PI**.

Termination Notices ?

Success! Curie, Marie Termination form for Grant number: 1T23HL456789-38 is routed to PI on Wed Mar 22 2023 18:03:16 GMT-0400 (Eastern Daylight Time)

- 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.

<div>  <div>Curie, Marie</div> <div> <span>Termination</span> <span>PRE-DOC</span> <span>In Progress PI</span> </div> </div>						
<div> <div>Total NRSA Support Under This Award</div> <div>Degree</div> <div>Routing History</div> </div>						
10 Results						
Id Event		Action Taken By	Action Date	Action Taken	Current Status	Current Reviewer
1	Trainee Routes TN to PI	Curie, Marie	03/22/2023 6:03 PM	Routed to PI	In Progress PI	SKLODOWSKA, SALOMEA
2	PI Routes TN to Trainee	SKLODOWSKA, SALOMEA	03/22/2023 5:29 PM	Routed to Trainee	In Progress Trainee	Curie, Marie

6. Additionally, the trainee should update their information in the **Personal Profile** section within Commons and should know how to contact the Service Desk if the list of prior Kirschstein-NRSA support is incorrect.

7. Click the **Done** button.

If no action is taken by the PI within 14 business days, the system will automatically route the form to the Business Official (BO), send a notification to the BO, and change the status to **In Progress by BO**.

---

**NOTE:** If a TN is sent back to an Institution by the Agency and the TN has a status of **In Progress BO**, the PI is able to recall the TN.

---



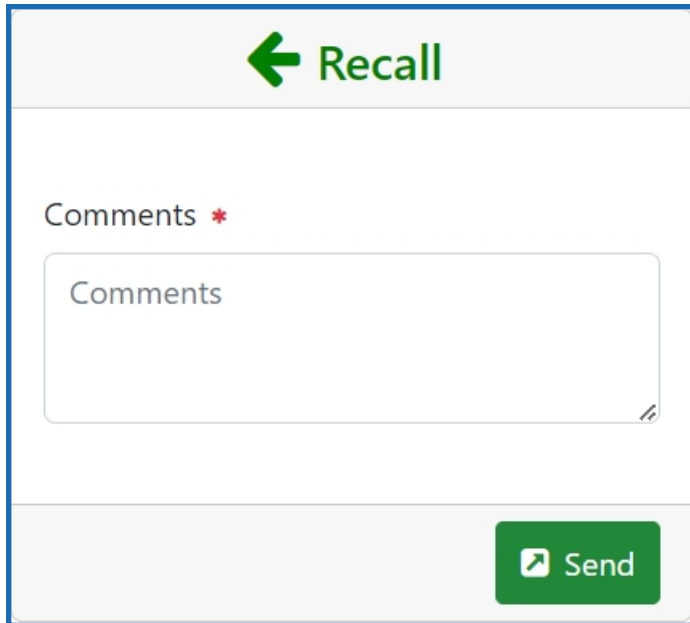
---

**NOTE:** The PD/PI should make every effort to have the Trainee update their *Personal Profile* screen within Commons, specifically to update their email address with their new (forwarding) email address, before the Trainee leaves the Institution.

---

## Recall

If necessary, you can recall a termination form that has been routed onward to make edits.

A screenshot of a web form titled "Recall" with a green left-pointing arrow icon. Below the title is a section labeled "Comments \*" with a red asterisk. Underneath is a large, empty text input field with the placeholder text "Comments". At the bottom right of the form is a green button with a white paper plane icon and the text "Send".

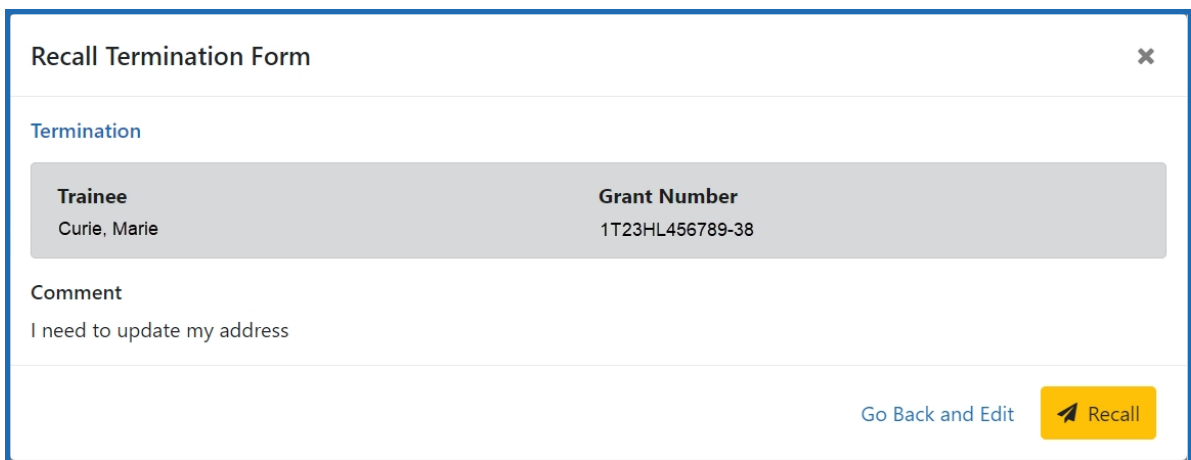
← Recall

Comments \*

Comments

Send

1. Add comments to the **Comments** field.
2. Click the **Send** button. A confirmation message displays.

A screenshot of a web form titled "Recall Termination Form" with a close button (X) in the top right corner. Below the title is a section labeled "Termination". Underneath is a table with two columns: "Trainee" and "Grant Number". The "Trainee" column contains the text "Curie, Marie" and the "Grant Number" column contains the text "1T23HL456789-38". Below the table is a section labeled "Comment" with the text "I need to update my address". At the bottom right of the form are two buttons: "Go Back and Edit" and a yellow button with a left-pointing arrow icon and the text "Recall".

Recall Termination Form

Termination

Trainee	Grant Number
Curie, Marie	1T23HL456789-38

Comment

I need to update my address

Go Back and Edit Recall

3. Click the **Recall** button. The form is returned to your queue.





## 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.

Pending Forms <span>13</span>								
Filter Table		13 Results		   1 of 1 				
Process Termination Notice For...	Termination Status	Appointment Start Date	Appointment End Date	Termination Date	Num of Months and Days	Degree Level	Award Number	PD/PI
<a href="#">Borab, Luca</a>	*** <span>In Progress BO</span>	01/01/2023 02/28/2023	01/01/2023 02/28/2023	02/28/2023	2 months 0 days	<span>Pre-Doc</span>	5T35HL007690-38	Margolis, Benjamin

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  
SKŁODOWSKA, 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

Organization
Academic

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 Trainee →

Comments

Comments

Send

Save & Route to PI →

Comments

Comments

Send

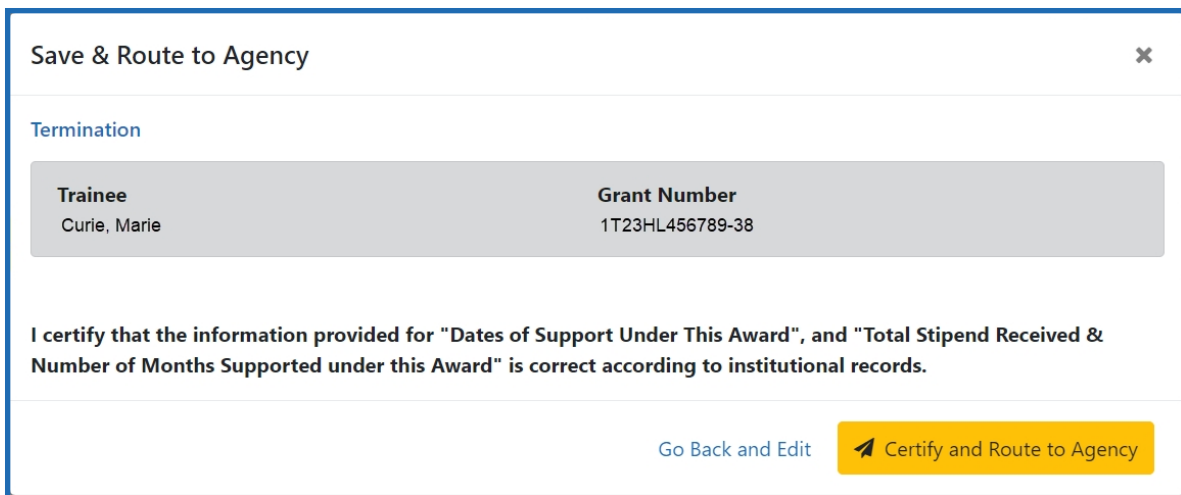
Route to Agency →

Comments

Comments

Submit

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



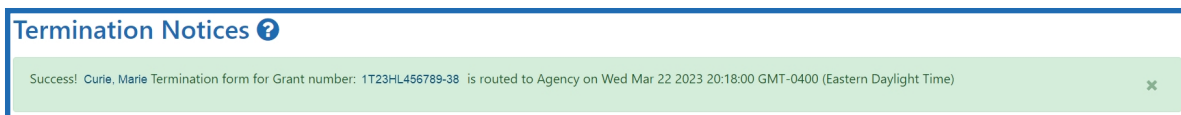
The screenshot shows a web form titled "Save & Route to Agency" with a close button (X) in the top right corner. Below the title is a section labeled "Termination". Inside this section is a table with two columns: "Trainee" and "Grant Number". The "Trainee" row contains the text "Curie, Marie". The "Grant Number" row contains the text "1T23HL456789-38". Below the table is a certification statement: "I certify that the information provided for 'Dates of Support Under This Award', and 'Total Stipend Received & Number of Months Supported under this Award' is correct according to institutional records." At the bottom right of the form are two buttons: "Go Back and Edit" and "Certify and Route to Agency".

Trainee	Grant Number
Curie, Marie	1T23HL456789-38

I certify that the information provided for "Dates of Support Under This Award", and "Total Stipend Received & Number of Months Supported under this Award" is correct according to institutional records.

[Go Back and Edit](#) [Certify and Route to Agency](#)

- 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**.



The screenshot shows a confirmation message titled "Termination Notices" with a question mark icon. The message text is: "Success! Curie, Marie Termination form for Grant number: 1T23HL456789-38 is routed to Agency on Wed Mar 22 2023 20:18:00 GMT-0400 (Eastern Daylight Time)". There is a close button (X) in the top right corner.

Termination Notices ?

Success! Curie, Marie Termination form for Grant number: 1T23HL456789-38 is routed to Agency on Wed Mar 22 2023 20:18:00 GMT-0400 (Eastern Daylight Time)

- 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	

## Reassign a Termination Notice to yourself

BOs have the ability to reassign to themselves any termination notices currently assigned to another BO.

1. In the In Progress Termination Notices list on the Business Official Home screen, click the **With Any BO** link. A list of all termination notices in **In Progress BO** status is displayed.
2. Locate the termination notice you wish to reassign to yourself.
3. Click the hyperlinked trainee name to view the Termination Notices screen.
4. At the bottom of the screen, click the **Save as Draft** button in the **Save & Assign to Me** card. A confirmation message displays.

Review Termination Form for Save

Termination

Trainee  
Curie, Marie

Grant Number  
1T32HL456789-38

Go Back and Edit Save

- Click the **Save** button. The termination notice is reassigned to you and the **Take Action** section now has options to process it.

Take Action

Save Draft

Save as Draft

Save & Route to Fellow →

Comments

Send

Route to Sponsor →

Comments

Send

Route to Agency →

Comments

Submit

## 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

- In the Awarded Grants table, click the hyperlinked grant number to display the Trainee Roster screen.
- Locate the trainee you wish to terminate. The **Filter table** field can be used to locate someone quickly if desired.

Filter Table

25 Results

<

1 of 1

>

Trainee Name	Appointment Status	Termination Status	Appt Type	Appt Start	Appt End	Termination Date	Num of Months And Days	Degree Level	
5T35HL007690-38									
<a href="#">Skłodowska, Salomea</a>	***		In Progress BO	New	01/01/2023	02/28/2023	02/28/2023	2 months 0 days	Pre-Doc
Curie, Marie	***		New	New	01/01/2023	02/28/2023		2 months 0 days	Pre-Doc


View Appointment Form

View Routing History

Create Service Desk Ticket

Amend

Initiate Termination Notice

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

**Fiscal Year**  
2022

**Project Period**  
05/01/1980 - 08/31/2025

**Grant Management Specialist**  
✉ [Ulam, Joseph](#)

**Program Official**  
✉ [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

0

**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

X Cancel

Only pdf format, 6 MB maximum allowed

### Post Award Details

**Activity**

Select one

**Organization**

Select one

**Type of Position**

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

Termination

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.

---

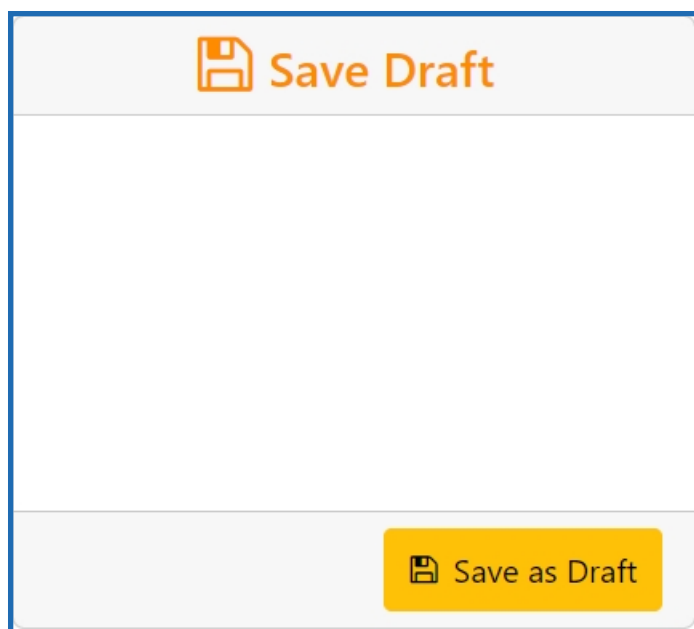
**NOTE:** When the end date is modified, and the appointment is for a partial year, sometimes the recalculated stipend amount will differ from the stipend amount calculated by the institution. The institution can modify the stipend based on its calculation. The Agency will approve the modified stipend, 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
<a href="#">Go Back and Edit</a> <a href="#">Save</a>	

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* on page 82, *Process Termination Notice by Trainee* on page 92 and *Process New Termination Notice by BO* on page 99 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

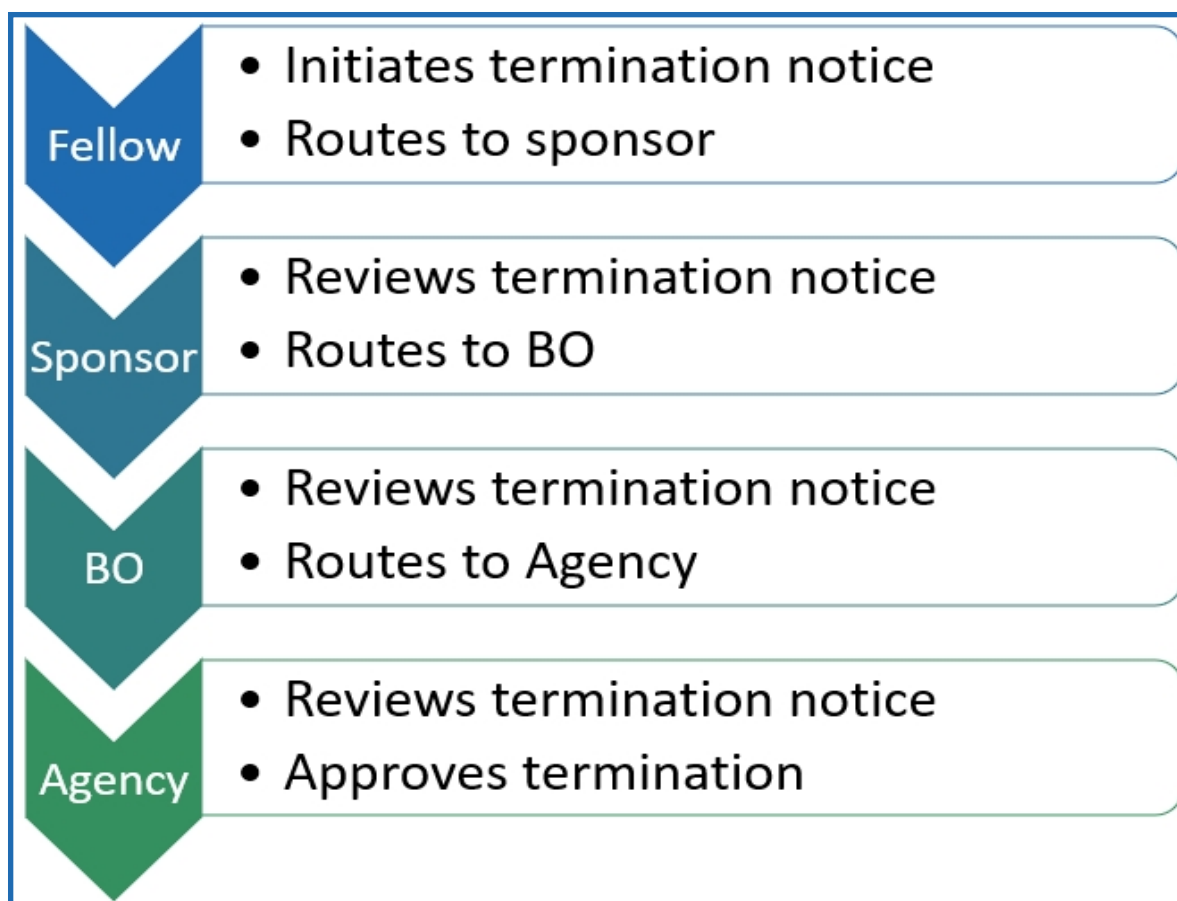
---



needs to know, and be able to provide, a forwarding email address for the Trainee to be entered within the Termination Notice.

## 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.



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 117*

*Process New Termination Notice by BO on page 120*

## **Initiate a New Fellowship Termination**

The Termination Notice for a Fellow can be initiated by the PD/PI (Fellow), business official (BO), Sponsor, or Sponsor Delegate.

## Initiate a new termination

1. In the Awarded Grants or Sponsored 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.

Filter Table

25 Results

<

1 of 1

>

Trainee Name	Appointment Status	Termination Status	Appt Type	Appt Start	Appt End	Termination Date	Num of Months And Days	Degree Level	
5T35HL007690-38									
<a href="#">Skłodowska, Salomea</a>	***	✓	In Progress BO	New	01/01/2023	02/28/2023	02/28/2023	2 months 0 days	Pre-Doc
Curie, Marie	***	✓	New	New	01/01/2023	02/28/2023		2 months 0 days	Pre-Doc


View Appointment Form

View Routing History

Create Service Desk Ticket

Initiate Termination Notice

Amend

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  
09/01/2022 - 08/31/2023

Fiscal Year  
2022

Project Period  
05/01/1980 - 08/31/2025

Grant Management Specialist  
✉ [Ulam, Joseph](#)


Program Official  
✉ [Rotblat, Stanislaw](#)


 Curie, Marie ...

Termination PRE-DOC

Total NRSA Support Under This Award   Degree   Routing History

Termination Date: \*   Business Official: \*

02/28/2023 


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	<span>Accepted</span>

Totals: \$4,392

🔖 Other Relevant PHS ⓘ

Currently participating in NIH Loan Repayment Program 

National Health Service Corps Scholarship \*

Number of Months

Kirschstein-NRSA \*

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  
Select one ▾

Organization  
Select one ▾

Type of Position  
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

Terminati

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:

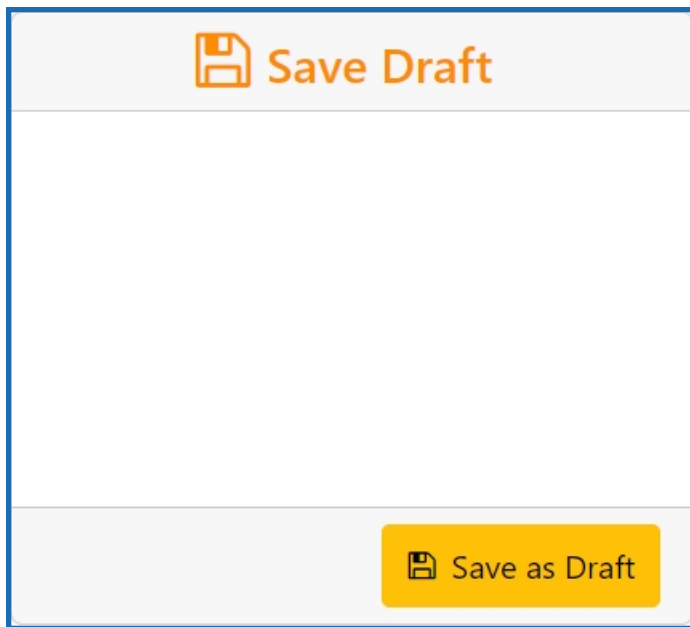
1. The Termination Date format is MM/DD/YYYY.
2. No commas or decimals are allowed in the Amount of Stipend/Salary field.
3. All comment text boxes are limited to 2000 characters.
4. Only the business official can submit the Termination Notice to the Agency for NRSA appointments and fellowships. For 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.
5. Only the PD/PI or business official can modify the stipend on an early termination for fellowships.

---

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

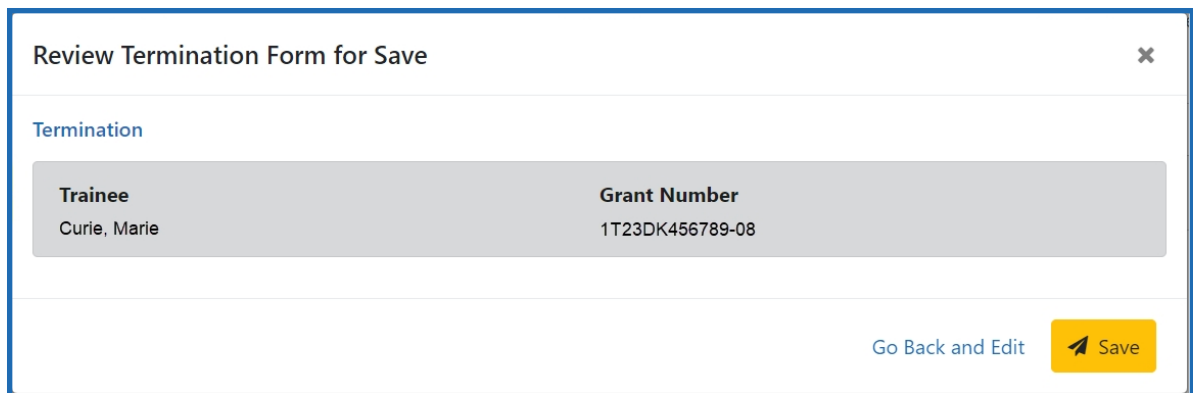
---

## Save Draft

A dialog box with a light gray header bar containing an orange floppy disk icon and the text "Save Draft". The main area is white and empty. At the bottom right, there is a yellow button with a floppy disk icon and the text "Save as Draft".

Save Draft	
<a href="#">Save as Draft</a>	

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

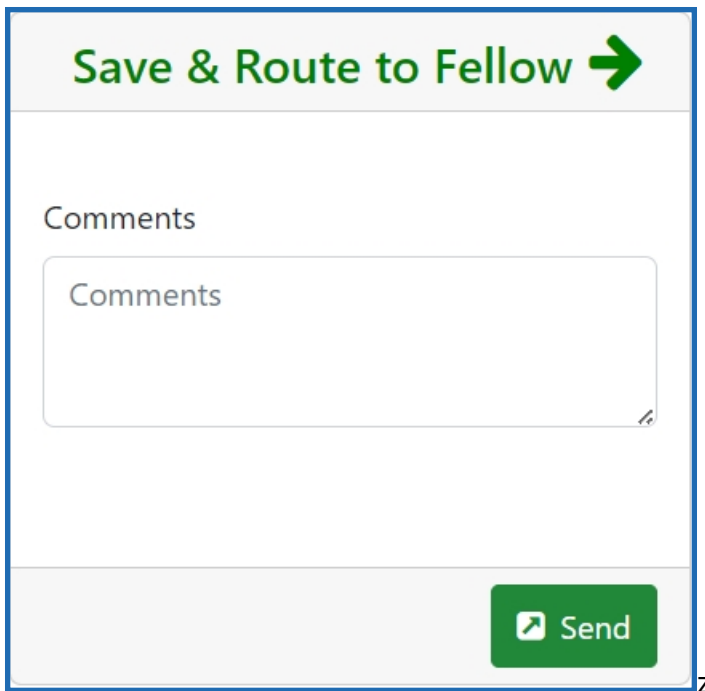
A confirmation dialog box titled "Review Termination Form for Save" with a close button (X) in the top right. Below the title is a section labeled "Termination" in blue. It contains a table with two columns: "Trainee" and "Grant Number". The "Trainee" row shows "Curie, Marie" and the "Grant Number" row shows "1T23DK456789-08". At the bottom right, there are two buttons: "Go Back and Edit" in blue and a yellow "Save" button with a floppy disk icon.

Review Termination Form for Save	
Termination	
Trainee	Grant Number
Curie, Marie	1T23DK456789-08
<a href="#">Go Back and Edit</a> <a href="#">Save</a>	

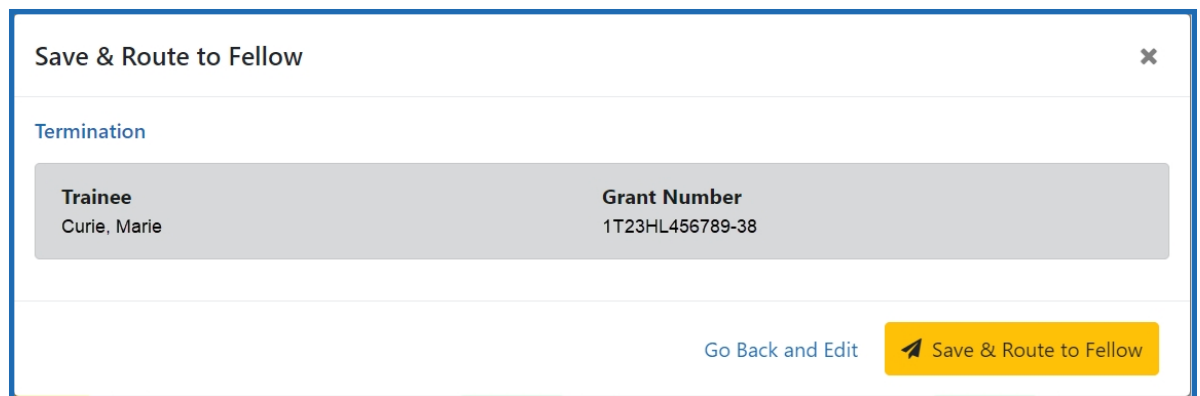
2. Click the **Save** button. Your edits are saved and the form remains in your queue. The draft form is saved and displayed for review; in addition, new options are added to the **Take Action** section.

## Route new termination for processing

1. If the Termination Notice was initiated by the **business official (BO), Sponsor, or Sponsor Delegate**, it must be routed to the fellow.



- a. Add comments to the **Comments** field if desired.
- b. Click the **Send** button. A confirmation message displays.



- c. Click the **Save & Route to Fellow** 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 PI**.

### 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 PI**.

2. If the Termination Notice was initiated by the **PD/PI**, it must be routed to the sponsor.

## Route to Sponsor →

Comments

Comments



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



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

Save & Route to Sponsor

Termination

Trainee

Huang, Wesley WeiQiao

Grant Number

5F30DK131851-02

Go Back and Edit

Save & Route to Sponsor

- c. Click the **Save & Route to Sponsor** 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 Sponsor**.

Termination Notices

Success! Curie, Marie Termination form for Grant number: 1T23HL456789-38 is routed to Sponsor on Wed Jan 17 2024 16:35:39 GMT-0500 (Eastern Standard 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 Sponsor**.

## Process Fellowship Termination Notice by Sponsor

1. In the Sponsored 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 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

SKŁODOWSKA, SALOMEA

Project Title

Long-Term Effects of Radium Exposure on Nearby Inhabitants

Institution

UNIVERSITY OF PARIS

Curie, Marie

TerminationPRE-DOCIn 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

Organization

Academic

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

Comments

Send

Route to Business Official →

Comments

Comments

Send

Terminati

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

Save & Route to BO

Termination

Trainee

Curie, Marie

Grant Number

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

- Click the **Save and Route to BO** 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 **In Progress BO**.

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)

- 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.

Pending Forms <span>13</span>								
Filter Table		13 Results		   1 of 1 				
Process Termination Notice For...	Termination Status	Appointment Start Date	Appointment End Date	Termination Date	Num of Months and Days	Degree Level	Award Number	PD/PI
<a href="#">Borab, Luca</a>	... <span>In Progress BO</span>	01/01/2023 02/28/2023	01/01/2023 02/28/2023	02/28/2023	2 months 0 days	<span>Pre-Doc</span>	5T35HL007690-38	Margolis, Benjamin

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  
SKŁODOWSKA, 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)

Supporting Documentation (optional)
View Uploaded PDF File

Post Award Details

Activity Further Education/Training
Organization Academic
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 →

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

Save & Route to Agency

Termination

<b>Trainee</b> Curie, Marie	<b>Grant Number</b> 1T23HL456789-38
--------------------------------	--

I certify that the information provided for "Dates of Support Under This Award", and "Total Stipend Received & Number of Months Supported under this Award" is correct according to institutional records.


[Go Back and Edit](#)[Certify and Route to Agency](#)

- 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 Agency on Wed Mar 22 2023 20:18:00 GMT-0400 (Eastern Daylight Time)

- 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	



## Personal Profile

The Personal Profile module in Commons is the central repository of information for all Commons registered users. It is designed so that individual eRA system users hold and maintain ownership over the accuracy of their own profile information. This profile information is then integrated throughout eRA's systems and used for a variety of agency business such as peer review, application data, and trainee data.

Personal profile information is used to pre-populate appointment and termination forms in xTrain. The xTrain system will check to ensure that you have provided all the necessary information prior to routing your xTrain forms back to the PD/PI.

### Personal Profile Fields Checked by xTrain

- Degree(s) – At least one degree is needed (if the stipend level on the xTrain appointment is higher than pre-Bachelor's degree) \*see below
- Race
- Sex
- DOB – Date of Birth
- eRA Email
- Citizenship

### Disadvantaged Background

To provide guidance in answering this question, the [Trainee-Specific Information screen](https://www.era.nih.gov/commons/disadvantaged_def.htm) provides a link to further information on disadvantaged background ([https://www.era.nih.gov/commons/disadvantaged\\_def.htm](https://www.era.nih.gov/commons/disadvantaged_def.htm)).

Under extraordinary circumstances the PHS may, at its discretion, consider an individual beyond the undergraduate level to be from a disadvantaged background. Such decisions will be made on a case-by-case basis, based on appropriate documentation. Trainees beyond the undergraduate level should consult with their training grant PD/PIs for further instructions.

## \* List of Degrees

xTrain will check Degree information as part of the Appointment process as follows:

- PRE-BACCALAUREATE: does not have a Bachelor's degree
- PRE-DOC: must have a Bachelor's Degree or equivalent
- POST-DOC: must have a PhD, MD, or equivalent

---

**NOTE:** Trainee should provide information on degrees in progress and their expected completion date.

---

Use the **Add a Degree** button to provide new or additional degree information.

EDUCATION
 
 CLOSE

**You have 3 completed degrees or post-graduate clinical training, and 0 in progress**

Enter all post-high school degrees completed or in progress. It should also include your latest medical residency, if you have one. You may enter degrees in any order.

Your degree information is sometimes checked against grant applications or used to populate other forms. Your highest degree can affect eligibility for awards or appointments.

**Trainees:** This information is critical. We use it to determine eligibility, and it can affect stipends.

**Post-Graduate Clinical Training:** If you entered at least one completed degree, you can add post-graduate clinical training information. Commons includes information on only one clinical training at a time. If you already have clinical training information listed and you now want to tell us about a new post-graduate clinical training, use Edit Post-Graduate Clinical Training Information to change the information.

**Fellowships:** Enter post-doctoral fellowships and assistantships on the Employment page.

[For translation of degree codes click here](#)

---

**Your degrees** Add a Degree

**Add Degree** \*Required

\*Degree Name If your degree is not in the list, select one of the "Other Degree" options. If you do not expect to complete this degree, leave the date blank.

Select One Other Degree

\*Status Completed in MM/YYYY

Completed in In Progress, expected MM/YYYY

Length of program in progress Select

\*Institution If the institution is outside the US, enter the city and country where it is located:

Is this your terminal degree? ☐

Area of Study

Primary Public Health

Secondary

Add
Add another Degree
Cancel

Date Completed	Degree and Institution	Action
June 2003	PHD in Sample University	EDIT            DELETE

Figure 6: List of Degrees Screen

For more information on the *Personal Profile* Module, please refer to the [Personal Profile](#) topic in the [Commons](#) online help.

## Appendix A – Statement of Appointment (Form PHS 2271)

For a printable sample form, along with complete instructions on all fields in the form, see the following:

<https://grants.nih.gov/training/phs2271.pdf>

## Appendix B – Termination Notice (Form 416-7)

For a printable sample form, along with complete instructions on all fields in the form, see the following:

<https://grants.nih.gov/grants/funding/416/phs416-7.pdf>

## Appendix C – Payback Agreement (Form PHS 6031)

For a printable sample form, along with complete instructions on all fields in the form, see the following:

<https://grants.nih.gov/grants/funding/416/phs6031.pdf>

## Appendix D – Appointment Errors/Warnings

The table below identifies the circumstances (conditions) when errors or warnings occur, the error or warning message provided as a result, and the role of the individual who sees the message on the screen.

**NOTE:** When the internal user clicks the Validate button, the warnings will appear for that appointment. The errors will not be shown because the appointment cannot be submitted with errors.

Condition	Error or Warning	Message	Role Receiving Message
The Trainee Appointment Period specified exceeds 12 months.	Error	A Trainee Appointment cannot exceed 12 months without prior approval of the awarding agency. Please adjust the Start/End Date of the Appointment or contact the eRA Help Desk for further assistance.	PI
The Start and End Dates of the New Appointment cannot be within the Start and End Date of the existing Appointment for the Trainee.	Error	There is another existing Appointment for the Trainee on the Grant # [Insert Grant # and the PI Name of the existing Appointment]. The Start and End Dates of the new Appointment cannot be within the Start and End Date of an existing Appointment for the	PI

Condition	Error or Warning	Message	Role Receiving Message
		Trainee.	
The Appointment Start Date is not within the Budget Period year of the Associated Grant.	Error	The Trainee Appointment Start Date should occur within the Budget Period year of the associated grant.	PI
The Appointment Start Date should be less than the Appointment End Date.	Error	The Appointment Start Date should be less than the Appointment End Date.	PI
The Trainee Appointment End Date must be less than or equal to the Project Period End Date.	Warning	The Trainee Appointment End Date must be less than or equal to the Project Period End Date.	PI
If the Trainee Race, Sex, or Birth Date is not entered...	Error	The Trainee Race, Sex, and Birth Date must be entered. Where available, Do not wish to provide, can be used. The Trainee must enter this information on the Personal Profile screen in eRA Commons.	Trainee/PI**
If the Ethnicity and/or Disabilities are not entered...	Error	The Trainee Ethnicity and Disabilities must be entered. Where available, Do not wish to provide, can be used. The Trainee	Trainee/PI**



Condition	Error or Warning	Message	Role Receiving Message
		must enter this information on the Personal Profile screen in eRA Commons.	
If the Stipend/Salary amount is not entered or is entered but is zero or less. The R25 activity code can have zero stipend/salary.	Error	The Stipend/Salary amount must be entered and be greater than zero.	PI
The citizenship indicator for Trainee Profile is not entered.	Error	The Trainee's citizenship must be entered. The Trainee must enter this information on the Personal Profile screen in eRA Commons.	Trainee/PI**
The grant does not have the activity code T34, the Stipend Level is not PRE-BAC, and the Trainee does not have at least one degree.	Error	At least one Trainee degree must be entered. The Trainee must enter this information on the Personal Profile screen in eRA Commons.	Trainee/PI**
The Appointment is for a Post-Doc or a Scholar and the Trainee does not have a PhD, MD or at least one equivalent degree.	Warning	The Trainee has not entered a PhD, MD, or equivalent degree required for this Post-Doc or Scholar Appointment. The Trainee must enter	Trainee/PI*

Condition	Error or Warning	Message	Role Receiving Message
		this information on Personal Profile screen in eRA Commons.	
The Appointment is for a Pre-Doc and Trainee does not have Bachelor's degree or equivalent degree.	Warning	The Trainee has not entered a Bachelor's degree or equivalent degree required for this Pre-Doc Appointment. The Trainee must enter this information on the Personal Profile screen in eRA Commons.	Trainee/PI*
The Pre-Doc is receiving more than five years of NRSA support.	Warning	The Pre-Doc may not receive greater than five years of NRSA support without a waiver from the awarding agency.	PI
The Post-Doc is receiving more than three years of NRSA support.	Warning	The Post-Doc may not receive greater than three years of NRSA support without a waiver from the awarding agency.	PI
The Trainee profile indicates Federal Debt with no explanation provided.	Error	The Trainee has Federal Debt indicated in the Trainee-Specific section of their Personal Profile. An explanation for the Federal Debt must be provided.	Trainee

Condition	Error or Warning	Message	Role Receiving Message
If the Appointment Period (difference between Start and End Dates) is less than nine months and activity code is not T35...	Warning	No Trainees may be appointed for less than nine months unless the Training grant was designated for short-term training positions or prior approval was granted by the awarding agency.	PI
If Trainee Profile is missing a SSN...	Warning	No SSN has been entered in the Trainee Personal Profile. The Trainees are asked to voluntarily provide their SSN information to aid in the processing of the Trainee Appointments by providing the agency with vital information necessary for accurate identification.	Trainee/PI**
For a new Appointment that has not previously been routed to the Trainee, if the PI tries to submit the 2271 Form to the agency.	Error	<p>The Save &amp; Submit function failed. The 2271 Form must be routed to the Trainee prior to submission to agency.</p> <p>NOTE: The Save &amp; Route to Trainee button appears at the bottom of the screen after the PI invites or re-invites the Trainee to register in eRA Commons</p>	PI

Condition	Error or Warning	Message	Role Receiving Message
		AND the Trainee follows the e-mailed registration instructions.	
If the grant is aT35 and the number of months between the Appointment Start and End Dates is less than two months...	Warning	If the grant Activity Type is T35 then the Appointment Period should not be less than two months.	Trainee/PI**
If the grant is a T35 and the number of months between Appointment Start and End Dates is more than three months...	Warning	If the grant Activity Type is T35 then the appointment period should not exceed three months.	Trainee/PI**
The activity code for the grant is T34 and the Trainee has any type of degree.	Warning	Because the Trainee has a degree, confirm the Trainee's eligibility for the T34 Appointment.	Trainee/PI**  This warning exists in xTrain only so there is no need for the Edit Checker validation procedure.
If the Appointment Period (difference between Start and End Dates) is less than eight	Error	For RL5, RL9, R90 and R25 activity codes, xTrain does not accept Appointments if the Appointment Period	Trainee/PI**

Condition	Error or Warning	Message	Role Receiving Message
weeks and the activity code is RL5, RL9, R90 or R25...		is less than eight weeks.	
For RL5, RL9, R90 and R25 activity codes, if the Non-Resident is selected on Trainee Personal Profile...	Warning	Please make sure you are following the FOA instructions regarding citizenship requirements.	Trainee/PI**
If the Appointment is for a Participant and no degree is specified...	Warning	No degree information has been entered on Personal Profile screen in eRA Commons.	Trainee/PI**
For RL5, RL9, R90 and R25 activity codes and the Field of Research Training (FOT) is not specified...	Warning	The Field of Research Training (FOT) or Career Development is not entered.	Trainee/PI*
For all activity codes except for R25, R38, RL5, RL9, and R90, if Non-Resident is selected on the Trainee Personal Profile...	Error	The Appointed individuals must be citizens, non-citizen nationals of the United States, or lawfully admitted permanent residents.	Trainee/PI**

## Appointment Errors/Warnings Quick Reference