

JDRF Post-Award Instructions and FAQs

Helpful Hints

- For the most optimal system functionality, please use either **Google Chrome** or **Mozilla Firefox** as your browser when accessing RMS360.
- If you are new to the system, please click on the **REGISTER** button found on the RMS360 login page to submit a new user registration.
Note: Please refer to the FAQ content above when registering an RO or FO contact in RMS360 as this process is executed differently.
- If your **Organization** does not appear in the dropdown menu, please follow the instructions on the registration form to submit your new organization registration to JDRF.
- If you forget your username or password, you may reset your password or retrieve your username from the login page of RMS360 by selecting the “**Forgot your username**” and “**Forgot your password**” links.
- While navigating your proposal or LOI in the system, select **Save Draft** often to ensure there is no loss of data. This is especially pertinent in the Budget section(s).

RMS360 Postaward FAQs

1. **Accounts Log In and Password**
 - i. What's the best browser to use with RMS360?
 - ii. How do I reset my password?
 - iii. How do I change my contact information in RMS360?
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 - ii. What are the roles and responsibilities of the Research Officer (RO)?
 - iii. What are the roles and responsibilities of the Finance Officer (FO)?
 - iv. What are the roles and responsibilities of the Research Delegate (RD)?
 - v. What are the roles and responsibilities of the Technology Transfer Office (TTO)?
3. **Activations and Renewals**
 - i. How do I add my TTO (Technology Transfer Officer) to a proposal?
 - ii. How do I submit an Activation?
 - iii. What do I need to enter into the 'Budget Currency Exchange Rate' field?
 - iv. For multi-year grants, what do I need to submit to renew my grant?
 - v. How do I submit a Renewal Application?
4. **Payment Details**
 - i. How do I add Payment Details?
5. **Ethical Documents**
 - i. How do I add an Ethical Document?
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 - i. How do I make changes to my milestones after my award has been activated/renewed?
7. **Monitoring and Reporting**
 - i. How do I view when my reports are due?
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8. **Budget Update**
 - i. How do I request/submit a budget update?
9. **No-Cost Extensions**
 - i. How do I submit a No-cost Extension?
10. **Transfers**
 - i. How do I request a transfer?
11. **Transition**

- i. How do I request a transition?

12. Termination

- i. How do I complete the termination activity?

13. Intellectual Property

- i. How do I add Intellectual Property?
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1. Accounts Log In and Password

i. What's the best browser to use with RMS360?

For the most optimal system functionality, we recommend using either **Google Chrome** or **Mozilla Firefox** as your browser when accessing RMS360.

ii. How do I reset my password?

If you forget your password, you may reset your password from the login page of RMS360 by clicking on the **"Forgot password"** link. Your username is your email address.

iii. How do I change my contact information in RMS360?

The following steps can be done by anyone who has an RMS360 login:

Step 1. Log into RMS360.

Step 2. On the home page, click on 'My Profile' in the upper right-hand corner.

Step 3. After the page refreshes, click on Edit in the upper left-hand corner.

JDRF RMS360
IMPROVING LIVES. CURING TYPE 1 DIABETES.

Edit

Ms.

Main

Step 4. Make the necessary changes and click on Save at the bottom of the screen.

View

Ms.

Main

* First Name:

Middle Name / Initial:

* Last Name:

Title:

* Prefix:

* Phone: | Phone Ext.:

* Email:

Last Updated:

* Organization:

Address:

Address 2:

City:

* Country:

* State / Province:

Updated By: Karen Ng

* Please select your highest degree earned :

Please select your secondary degree (if applicable) :

Mobile Phone:

Upload W9 (must be PDF): [W-9.pdf](#) **Upload file**

Payment Details ID	Grantee Name	Account #	Status	Bank Letter(s)	Open
PD -					.pdf Open

Add Payment Details

Save

2. Roles in RMS360

i. What are the roles and responsibilities of the Principal Investigator (PI)/Researcher?

The Principal Investigator has access to all reporting materials in RMS360 for his/her grant(s). The PI may complete most sections of the activation and renewal and works with the Research Officer to formally submit to JDRF. In addition, the PI can complete and submit other reporting items in RMS360 as needed throughout the lifecycle of the award.

ii. What are the roles and responsibilities of the Research Officer (RO)?

The Research Officer has access to the activation and renewals and should work with the Principal Investigator and Financial Official to complete grant activations, renewals and expenditure reports as appropriate. For other reporting items, the RO should work with the PI as needed. In addition, the individual is required to complete the payment details for activations and renewals, certify that the information is accurate, and submit the reports.

iii. What are the roles and responsibilities of the Finance Officer (FO)?

The Finance Officer has access to expenditure reports for assigned grants. In this role, the individual is required to complete the expense column in the expenditure report, certify that the information included in the report is accurate, and submit the report to the Research Officer.

iv. What are the roles and responsibilities of the Research Delegate (RD)?

The Research Delegate is designated by the Principal Investigator to assist with all required PI submissions. The RD has access to all reporting materials in RMS360 for his/her assigned grant(s) with the exception of the annual Expenditure Report. The RD may complete most sections of the Activation and Renewal and can complete other reporting items as needed throughout the lifecycle of the award such as Scientific Progress Reports and Ethical Renewals. The RD cannot submit any items in RMS360.

v. What are the roles and responsibilities of the Technology Transfer Office (TTO)?

The Technology Transfer Office contact is designated by the Grantee Institution and is the individual responsible for reporting all Intellectual Property to JDRF.

3. Activations and Renewals

i. How do I add my TTO (Technology Transfer Officer) to a proposal?

Under the *Contacts* tab of the online application, select your TTO from the appropriate dropdown menu.

If your TTO contact does not appear in the menu, select the *Click here to create a TTO* link.

ii. How do I submit an Activation?

Roles: The following steps are to be completed by the PI and RO.

Step 1. The PI logs in to RMS360; select My Applications & Grants and the tab “Awaiting Activation”, and then click on the blue ‘View/Edit’ button.

Step 2. The PI completes all the information requested on the tabs – Contacts, Other Support, Ethical Certifications, and Budget. Under the Budget tab, click on ‘Add Budget’ to add, complete and save the Year 1 budget.

Letter of Intent: [Letter of Intent](#)

Summary Statement:

Status.: Awaiting Activation

* As you work in RMS360, click Save Draft to save and view your changes.

Contacts Other Support Ethical Certifications Milestones And Timelines **Budget**

Please see the yearly approved amounts below. To view the Proposal budget submitted in the application click 'Edit/View'. You will NOT be able to edit the proposal budget. To renew budget click 'Add Budget' for the associated budget period.

Year	Approved Amount
Year 1	
Year 2	
Year 3	

Budget Period	Created Date
View LOI	2016-04-08 03:37:00
View Proposal	2016-06-01 22:07:00

[Add Budget](#)

[Previous](#)

[Save Draft](#) [Validate and Submit Activation Materials to RO](#) [Delete](#)

Step 3. The PI clicks on the button at the bottom of the screen, "Validate and Submit Activation Materials to RO".

Step 4. The RO logs into RMS360 and completes the activation process by approving the Year 1 Budget and adding payment details. Select the tab, "Pending RO Approval", and click on the blue Edit/Submit button.

Grants & Activities

Proposals - Grants (1) **Pending RO Approval (1)** Post Award - Pending RO Approval (0) Pending Termination Approval (0)

Call Name Proposal Title Principal Investigator Date - FP Submitted to RO Submission Number View/Print

2016-07-12

[View / Print](#) [Edit/Submit](#)

iii. **What do I need to enter into the 'Budget Currency Exchange Rate' field?**
For grant budget in AUD, please enter "0". For grant budget in USD, please enter "1".

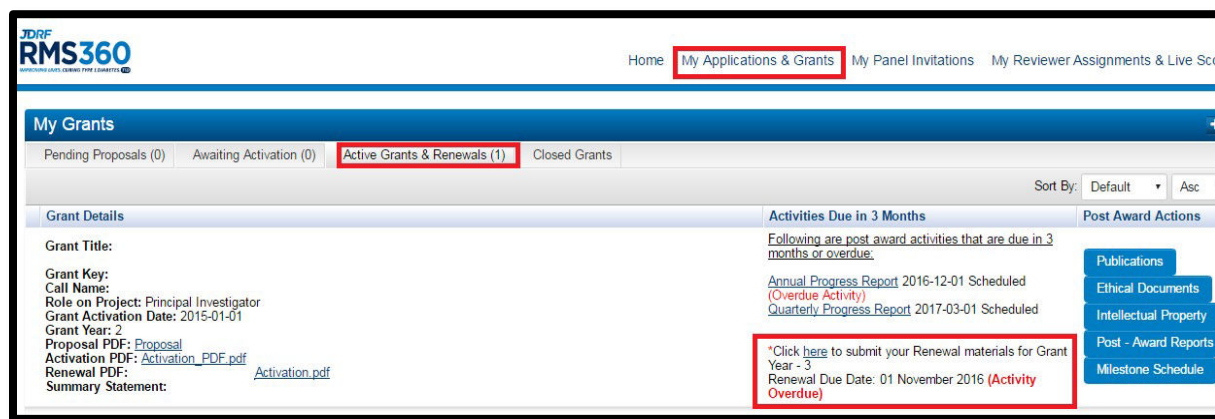
iv. **For multi-year grants, what do I need to submit to renew my grant?**
In order to renew funding for a multi-year grant, the following must be submitted:

- PI must submit an Annual Progress Report
- PI must work with the RO to submit a Renewal.

Note: the renewal starts in the PI's queue.

v. **How do I submit a Renewal Application?**
Roles: The following steps are to be completed by the PI and RO.

- Step 1.** The PI logs in to RMS360; select My Application and Grants and the tab Active Grants and Renewals.
- Step 2.** Click on the renewal link under “Activities Due in 3 Months”
- Step 3.** See question, “How do I submit an Activation?”, and follow the steps starting at #2.



4. Payment Details

i. How do I add Payment Details?

Roles: The following steps are to be completed by the Research Officer (RO).

- Step 1.** See upper right corner hover over RO name and select ‘My Profile’ under dropdown



- Step 2.** Click on “Add Payment Details.”

Edit

Main

Please select your highest degree earned :

Please select your secondary degree (if applicable) :

Mobile Phone:

Upload W9 (must be PDF):

Payment Details ID

Grantee Name

Account #

Status

Bank Letter(s)

Open

Add Payment Details

Step 3. Select Domestic or International under dropdown, a new window will appear, click on Save Draft to enable upload of an official bank letter, complete payment details and click on Save.

New Payment Details

Payment Details

Status:

Payment Details ID:

Upload Bank Letter(s)

Click Save before adding attachment

(must be PDF):

Select whether the Payment Details are International or Domestic

--Select One--

--Select One--

Domestic

International

per one

nsation:

Save Draft

Save

Edit Payment Details

Payment Details

Status: Awaiting JDRF Verification

Payment Details ID: PD - 1570

* Upload Bank Letter(s)
(must be PDF):

Lookup...

* Select whether the Payment Details are International or Domestic

Domestic

Domestic Bank Details

* Payee Name:

* Depository (Bank) Name:

* Depository (Bank)
Address:

* City:

* State:

* Zip:

* Organization EIN #:

* Routing/ABA #:

* Account #:

Grant keys per one
transation:

Save Draft

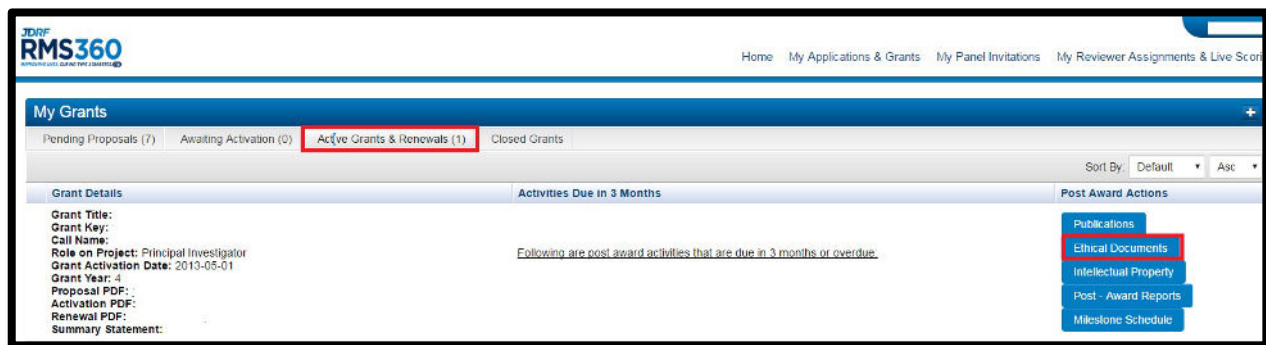
Save

5. Ethical Documents

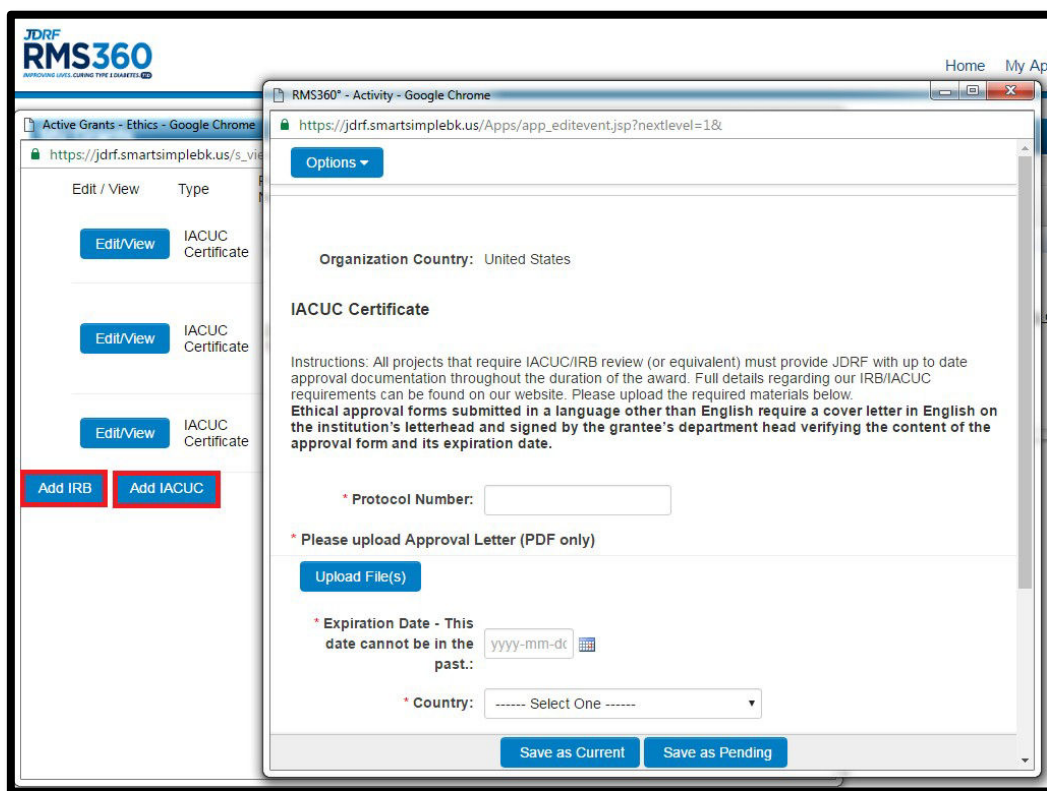
i. How do I add an Ethical Document?

Roles: The following steps are to be completed by the Principal Investigator (PI):

- Step 1.** Select the Active Grants & Renewals tab and click on the blue Ethical Document button on the right.



Step 2. After you click on the 'Ethical Documents' button, a new window will open. Complete the information, Upload the File and then click on "Save as Current" to submit. [Please note: The screenshot is for the IACUC form. For the IRB form, make sure you upload the approval letter, Study Protocol/Application, and if necessary, the Informed Consent form(s)].



6. Milestones

i. How do I make changes to my milestones after my award has been activated/renewed?

Please contact the JDRF Scientific Program Manager to make any changes.

7. Monitoring and Reporting

i. How do I view when my reports are due?

Roles: The following steps are for the Principal Investigator (PI), Research Officer (RO), and Financial Officer (RO).

PI: The PI can view all due dates for Post-Award Reports by logging in to RMS360 and selecting “Post-Award Reports”.

My Grants

Pending Proposals (6) Awaiting Activation (0) **Active Grants & Renewals (1)** Closed Grants

Sort By: Default Asc

Grant Details

Grant Title:
Grant Key:
Call Name:
Role on Project: Principal Investigator
Grant Activation Date: 2013-05-01
Grant Year: 4
Proposal PDF:
Activation PDF:
Renewal PDF:
Summary Statement:

Activities Due in 3 Months

Following are post award activities that are due in 3 months or overdue:

Post Award Actions

- Publications
- Ethical Documents
- Intellectual Property
- Post - Award Reports**
- Milestone Schedule

Post-Award Reports					
Proposal Title	Grant Key	Type	Due / Expiration Date	Status	View / Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	03/01/2014	Approved	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	06/01/2014	Approved	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	09/01/2014	Approved	View/Edit
T1 Diabetes	1-SRA-2015-123	Annual Progress Report	11/01/2014	Approved	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	03/01/2015	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	06/01/2015	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	09/01/2015	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Annual Progress Report	11/01/2015	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	03/01/2016	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	06/01/2016	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	09/01/2016	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Final Progress Report	03/15/2017	Scheduled	View/Edit

RO: The RO can view due dates/submission dates for expenditure reports and other documents by selecting the Proposals – Grants tab, clicking on the View button and selecting the Activities tab. The RO will coordinate with the PI to be informed of the due dates or submissions for Post-Award Reports. The RO will coordinate with the FO to be informed of the due dates or submissions for the Expenditure Reports.

Grants & Activities								
Proposals - Grants (3)			Pending RO Approval (0)		Post Award - Pending RO Approval (1)		Pending Termination Approval (0)	
#	Submission Number	Principal Investigator	Research Body	Proposal Title	Call Name	Mechanism	Status	View Grant
1	Submission Number: 201301703 Grant Key: 3-SRA-2015-					Strategic Research Agreement (SRA)	Active Grant	View

Main

Activities

Post-Award Reports

Budget

Ethics Certificates

Milestones

Project Emails

Other Activities

Sort by:

Default

Asc

View:

External

Type	Grant Year	Status	Scheduled/Due Date	Date - Submitted to JDRF	Approved Date
Expenditure Report	1	Submitted to RO	2016-11-15		
Expenditure Report	2	Scheduled	2017-11-15		
Expenditure Report	3	Scheduled	2018-11-14		

FO: The FO can view all due dates for Expenditure Reports by logging in to RMS360 and selecting “Expenditure Reports”.

ii. How do I submit an Expenditure Report?

Roles: The following steps are to be completed by the Finance Officer (FO) and Research Officer (RO):

Step 1. FO selects the tab 'Expenditure Reports' to see a list of Expenditure Reports due.

Step 2. Click on the blue 'Open' button to the right to open an expenditure report.

Welcome to RMS360

Welcome to RMS360, JDRF International's Research Management System. This portal enables you to readily access information relating to JDRF applications and awards associated with your research body.

If you have any grant-specific questions as you work within RMS360, please contact the appropriate [JDRF Program Administrator](#).

For T1DCRN grants, please contact the appropriate [JDRF staff member](#).

For any non-grant-specific inquiries or issues, please contact SmartSimple Support Services via email support@smartsimple.com or phone (866)239-0991. Support hours are Monday through Friday between 8:00am and 9:00pm US Eastern Standard Time.

Proposals - Grants tab provides a summary of all the applications and awards associated with this RO account. Use the Search functionality to navigate the list.

Activities (such as budgets, reports, payments, and emails) are located within each award under the **Proposals - Grants** tab and are read-only. For application and activity **Approvals**, please refer to the Approval tab(s) below.

RO instructions to approve an application and submit to JDRF:

1. In the **Pending RO Approval** tab, open the proposal by selecting the "Edit/Submit" button. Under the **Budget** tab, click "View" to edit or review the budget. When finished, click the "Approve Proposal Budget" button and close the budget window.
2. Review the entire proposal. When finished, click the appropriate button (see 3. and 4. below).
3. Click the "Send back to PI" button if revisions are required OR.
4. Click the "Submit to JDRF" button if the application is complete.
5. Reference the **Proposals - Grants** tab to ensure the proposal Status column has been updated to "Submitted to JDRF"

Grants & Activities

Proposals - Grants (1) **Expenditure Reports (3)**

Proposal Title	Grant Key	Grant Year	Status	Scheduled / Due Date	Approved Date	
	3-SRA-201	1	Scheduled	2016-11-15		Open

Step 3. Once the ER opens, complete the form (scroll down). For any variance highlighted in red, please include a justification. For any unexpended funds, complete the Carry Forward tab. Once you are done, click on the 'Submit to RO' button at the bottom of the screen:

Organization Country:
 Scheduled / Due Date: 2016-12-15
 Expenditure Report: [View / Print](#)

Reallocation Justification
For grants of less than \$500,000 per year, JDRF requires a reallocation justification for any reallocation of funds in excess of 20% per budget category. For grants of greater than \$500,000 per year, JDRF requires a reallocation justification for any reallocation of funds in excess of 10% per budget category. In the event that you have reallocated funds in excess of these thresholds, you must enter a justification in the text box below the expenditure report form.

Carry Forward
For grants of less than \$500,000 per year, grantees may automatically carry forward any unexpended balance that is less than 20% of the approved yearly budget. For grants of greater than \$500,000 per year, grantees may automatically carry forward any unexpended balance that is less than 10% of the approved yearly budget. In the event that you have any unexpended balance, please complete the carry forward tab with the breakdown of how you will use the funds.

IMPORTANT: If this is your first time opening the report, please click **Save** to see the budget and, if applicable, carry forward details.
When expenditure report is complete, click the Carry Forward tab below to enter carry forward amounts for next year if applicable.
Negative numbers cannot be entered in the Actuals or the Carry Forward amounts.

Expenditure Report **Carry Forward**

Category	Award Budget	Carry Forward	Total Budget	Actuals	Variance	% Variance
Personnel				\$0.00	\$51,096.00	100
Supplies				\$0.00	\$38,017.28	100
Travel				\$0.00	\$2,000.00	100
Other Costs				\$0.00	\$0.00	0
Total Direct Costs				\$0.00	\$91,113.28	
Indirect Costs				\$0.00	\$0.00	0
Contractual Costs				\$0.00	\$0.00	0
Equipment				\$0.00	\$0.00	0
Grand Total				\$0.00	\$91,113.28	100

Please answer the question below only if you have entered amounts that are outside the allowed variance

Provide a detailed justification

[Save Draft](#) [Save](#) [Submit to RO](#)

Step 4. RO selects the tab 'Post Award – Pending RO Approval' and clicks on blue 'Open' button to the right of the expenditure report.

JDRF RMS360 Home Pending RO and FO

Welcome to RMS360

Welcome to RMS360, JDRF International's Research Management System. This portal enables you to readily access information relating to JDRF applications and awards associated with your research body.

If you have any grant-specific questions as you work within RMS360, please contact the appropriate [JDRF Program Administrator](#).
For T1D/CRN grants, please contact the appropriate [JDRF staff member](#).
For any non-grant-specific inquiries or issues, please contact SmartSimple Support Services via email support@smartsimple.com or phone (866)239-0991. Support hours are Monday through Friday between 8:00am and 9:00pm US Eastern Standard Time.

Proposals - Grants tab provides a summary of all the applications and awards associated with this RO account. Use the Search functionality to navigate the list.
Activities (such as budgets, reports, payments, and emails) are located within each award under the **Proposals - Grants** tab and are [read-only](#). For application and activity **Approvals**, please refer to the Approval tab(s) below.

RO Instructions to approve an application and submit to JDRF:

1. In the **Pending RO Approval** tab, open the proposal by selecting the "Edit/Submit" button. Under the **Budget** tab, click "View" to edit or review the budget. When finished, click the "Approve Proposal Budget" button and close the budget window.
2. Review the entire proposal. When finished, click the appropriate button (see 3. and 4. below).
3. Click the "Send back to PI" button if revisions are required OR,
4. Click the "Submit to JDRF" button if the application is complete.
5. Reference the **Proposals - Grants** tab to ensure the proposal Status column has been updated to "Submitted to JDRF"

Grants & Activities

Proposals - Grants (2) Pending RO Approval (0) **Post Award - Pending RO Approval (1)** Pending Termination Approval (0)

Search:

Type	Proposal Title	Grant Key	Grant Year	Status	Scheduled / Due Date	Approved Date	
Expenditure Report		3-SRA-2015-	1	Submitted to RO	2016-11-15		Open

Step 5. The RO reviews the report; if revisions are needed click on "Send back to FO." If everything is complete click on "Submit to JDRF."

Expenditure Report: [View / Print](#)

Reallocation Justification

For grants of less than \$500,000 per year, JDRF requires a reallocation justification for any reallocation of funds in excess of 20% per budget category. For grants of greater than \$500,000 per year, JDRF requires a reallocation justification for any reallocation of funds in excess of 10% per budget category. In the event that you have reallocated funds in excess of these thresholds, you must enter a justification in the text box below the expenditure report form.

Carry Forward

For grants of less than \$500,000 per year, grantees may automatically carry forward any unexpended balance that is less than 20% of the approved yearly budget. For grants of greater than \$500,000 per year, grantees may automatically carry forward any unexpended balance that is less than 10% of the approved yearly budget. In the event that you have any unexpended balance, please complete the carry forward tab with the breakdown of how you will use the funds.

IMPORTANT: If this is your first time opening the report, please click **Save** to see the budget and, if applicable, carry forward details.

When expenditure report is **complete**, click the Carry Forward tab below to enter carry forward amounts for next year if applicable.

Negative numbers cannot be entered in the Actuals or the Carry Forward amounts.

Expenditure Report [Carry Forward](#)

Category	Award Budget	Carry Forward	Total Budget	Actuals	Variance	% Variance
Personnel	\$51,096.00		\$51,096.00	\$100.00	\$50,996.00	100
Supplies	\$36,904.00	\$1,113.28	\$38,017.28	\$0.00	\$38,017.28	100
Travel	\$2,000.00		\$2,000.00	\$0.00	\$2,000.00	100
Other Costs	\$0.00		\$0.00	\$0.00	\$0.00	0
Total Direct Costs	\$90,000.00	\$1,113.28	\$91,113.28	\$100.00	\$91,013.28	
Indirect Costs	\$0.00		\$0.00	\$0.00	\$0.00	0
Contractual Costs	\$0.00		\$0.00	\$0.00	\$0.00	0
Equipment	\$0.00		\$0.00	\$0.00	\$0.00	0
Grand Total	\$90,000.00	\$1,113.28	\$91,113.28	\$100.00	\$91,013.28	100

Please answer the question below only if you have entered amounts that are outside the allowed variance

Provide a detailed justification

testing

[Save](#)

[Submit to JDRF](#)

[Send back to FO](#)

8. Budget Update

i. How do I request/submit a budget update?

Roles: The following steps are to be completed by the Principal Investigator (PI) and Research Officer (RO).

- Step 1.** The PI must first email the JDRF Administrator to request permission to complete a budget update.
- Step 2.** The JDRF Administrator will email the PI once the budget update is created in RMS360.
- Step 3.** The PI logs in to RMS360, select 'My Applications & Grants' and the 'Active Grants & Renewals' tab, the budget update link will appear under the column Activities Due in 3 Months. The due date will appear next to the link.

The screenshot shows the JDRF RMS360 web application. The top navigation bar includes links for Home, My Applications & Grants (highlighted), My Panel Invitations, and My Reviewer Assignments & Live Scores. The main content area is titled 'My Grants' and has tabs for Pending Proposals (1), Awaiting Activation (0), Active Grants & Renewals (3) (highlighted), and Closed Grants. Below the tabs, there is a 'Sort By' dropdown set to 'Default' and 'Asc'. The 'Active Grants & Renewals' tab is selected, showing a table with columns: Grant Details, Activities Due in 3 Months (highlighted), and Post Award Actions. The 'Grant Details' column shows information for a grant, including Grant Title, Grant Key, Call Name, Role on Project (Principal Investigator), Grant Activation Date (2015-10-01), Grant Year (2), Proposal PDF (Proposal), Activation PDF (Activation.pdf), Renewal PDF (Activation.pdf), and Summary Statement. The 'Activities Due in 3 Months' column lists activities: Quarterly Progress Report 2016-12-01 Scheduled (Overdue Activity), Budget Update 2016-12-31 Scheduled (highlighted), and Quarterly Progress Report 2017-03-01 Scheduled. The 'Post Award Actions' column lists actions: Publications, Ethical Documents, Intellectual Property, Post - Award Reports, and Milestone Schedule.

- Step 4.** The PI completes the budget update and must submit click on, 'Submit to RO' at the bottom of the screen.

Grant Title: _____

Institution: _____

PI: _____

Call Name: _____

Grant Key: 3-SRA-2015-

Grant Year: 2 of 3

Approved Amount: \$ _____

Resolution Year: 2015

Grant Activation Date: 2015-10-01

Grant End Date: 2018-09-30

* Grant Year: 2

Organization Country: United States

Scheduled / Due Date: 2017-02-28

Budget Update	Original Year Budget
* Salaries & Wages: <input type="text"/>	Approved Salaries: _____
* Supplies: <input type="text"/>	Approved Supplies: _____
* Travel: <input type="text"/>	Approved Travel: _____
* Other Costs: <input type="text"/>	Approved Other Costs: _____
* Indirect Costs: <input type="text"/>	Approved Indirect Costs: _____
* Contractual Costs: <input type="text"/>	Approved Contractual Costs: _____
* Equipment: <input type="text"/>	Approved Equipment: _____
Total: 0.00	Maximum Budget Total: _____

Provide a detailed justification

* Upload Reallocation Request:
Please upload the reallocation request letter and any supporting documentation.

[Lookup...](#)

[Save Draft](#) [Save](#) [Submit to RO](#)

Step 5. The RO logs into RMS360, selects 'Post-Award – Pending RO Approval', and 'Opens' the budget update.

Grants & Activities							
Proposals - Grants (78)		Pending RO Approval (0)		Post Award - Pending RO Approval (1)		Pending Termination Approval (0)	
Type	Proposal Title	Grant Key	Grant Year	Status	Scheduled / Due Date	Approved Date	
Budget Update			2	Submitted to RO	2016-12-31		Open

Step 6. The RO reviews the budget update. If revisions are required, click on "Send back to PI". If acceptable, click "Submit to JDRF".

* Grant Year: 2

Organization Country: United States

Scheduled / Due Date: 2016-12-31

Budget Update	Original Year Budget
* Salaries & Wages: 141098	Approved Salaries: \$141,098.00
* Supplies: 65000	Approved Supplies: \$65,000.00
* Travel: 1200	Approved Travel: \$1,200.00
* Other Costs: 23321	Approved Other Costs: \$23,320.00
* Indirect Costs: 23060	Approved Indirect Costs: \$23,061.00
* Contractual Costs: 135080	Approved Contractual Costs: \$135,080.00
* Equipment: 0	Approved Equipment: \$0.00
Total: 388759.00	Maximum Budget Total: \$388,759.00

Provide a detailed justification

enter here

* Upload Reallocation Request:
Please upload the reallocation request letter and any supporting documentation.

[.pdf](#) [Lookup...](#)

[Save](#) [Submit to JDRF](#) [Send back to PI](#)

9. No-Cost Extensions

i. How do I submit a No-Cost Extension (NCE)?

Roles: The following steps are to be completed by the PI and the RO.

Step 1. A No-Cost Extension link will appear in the PI portal 90 days prior to the grant end date. If the PI does not see the link and would like to request one, contact the JDRF Administrator.

Step 2. The link for an NCE request is located under the Active Grants and Renewals tab under the column "Activities due in 3 months." The due date will appear next to the link.

My Grants

Pending Proposals (1) Awaiting Activation (0) **Active Grants & Renewals (3)** Closed Grants

Sort By: Default Asc

Grant Details	Activities Due in 3 Months	Post Award Actions
Grant Title: Grant Key: Call Name: Role on Project: Principal Investigator Grant Activation Date: Grant Year: 2 Proposal PDF: Proposal Activation PDF: Activation.pdf Renewal PDF: Activation.pdf Summary Statement:	Following are post award activities that are due in 3 months or overdue: Quarterly Progress Report 2016-12-01 Scheduled No Cost Extension 2016-12-31 Scheduled Quarterly Progress Report 2017-03-01 Scheduled	Publications Ethical Documents Intellectual Property Post - Award Reports Milestone Schedule

Step 3. PI must upload a progress report and a signed expenditure report reflecting expenses for the current Grant Year to the most recent monthly closing. PI must complete all sections of the Website Progress Report and No-cost Extension fields and when completed click on “Submit to RO”

Step 4. The following steps are to be completed by the Research Officer (RO).
Select the ‘Post Award-Pending RO Approval’ tab and click “Open”

Step 5. Review the Web Progress Report and No-cost Extension information. If revisions are required, click “Send back to PI”. If acceptable, click “Submit to JDRF”

10. Transfers

i. How do I request a transfer?

Roles: The following steps are to be completed by the Principal Investigator (PI).

- Step 1.** The PI must first email the JDRF Administrator and request a transfer as soon as the PI becomes knowledgeable of his/her transfer.
- Step 2.** The JDRF Administrator will email the PI with further instructions and steps to initiate the transfer.
- Step a.** The PI will need to complete a Termination activity in RMS360 for the former institution.
- Step b.** The PI will need to submit a Transfer application under the new institution.

11. Transition

i. How do I request a transition?

Roles: The following steps are to be completed by the Principal Investigator (PI).

- Step 1.** The PI must first email the JDRF Administrator to request a transition award, as soon as the PI becomes knowledgeable of his/her new faculty appointment.
- Step 2.** The JDRF Administrator will email the PI with further instructions and steps to initiate the transition, if approved.
- Step a.** The PI will need to complete a Termination activity in RMS360 for the former institution.
- Step b.** The PI will need to submit a Transition application under the new institution.

12. Termination

i. How do I complete the termination activity?

Roles: The following steps are to be completed by the Principal Investigator (PI) and Research Officer (RO).

- Step 1.** The PI must first email the JDRF Administrator to initiate a termination.
- Step 2.** The JDRF Administrator will email the PI once the termination activity is created in RMS360.
- Step 3.** The PI logs in to RMS360 and selects “Termination”.

JDRF RMS360

Home **My Applications & Grants** My Panel Invitations My Reviewer Assignments & Live Scoring

My Grants

Pending Proposals (0) Awaiting Activation (0) **Active Grants & Renewals (1)** Closed Grants

Sort By: Default Asc

Grant Details	Activities Due in 3 Months	Post Award Actions
Grant Title: Grant Key: 3-PDF- Call Name: Postdoctoral Fellowship Role on Project: Principal Investigator Grant Activation Date: 2014-05-01 Grant Year: 3 Proposal PDF: Proposal Activation PDF: Activation_PDF.pdf Renewal PDF: 3-PDF- Summary Statement:	Following are post award activities that are due in 3 months or overdue. Termination 2016-12-20 Scheduled	Publications Ethical Documents Intellectual Property Post - Award Reports Milestone Schedule

Step 4. The PI completes the termination and when done, click on the button at the bottom of the screen, 'Submit to RO'.

* Grant Year: 2

Organization Country: United States

Scheduled / Due Date: 2016-12-31

* Comments from JDRF

* Termination Date: yyyy-mm-dd

* Has the PI expressed a desire to continue his/her research project at another institution

☒ No
☐ Yes

* Is your award in the last year?: ☒ Yes
☐ No

If this award is transferring to a new institution and you expect to request an NCE your original institution needs to complete an NCE Activity in tandem with the termination activity between 90 – 60 day prior to the end date. Please contact your JDRF administrator to begin work on your No Cost Extension. Please note that all NCE's need to be approved prior to the transfer taking place.

will terminate award as of the termination date specified above and agrees to relinquish all claims to any unexpended and uncommitted funds remaining in the grant as of that date. The estimated unexpended balance on the above-specified termination date calculated on the basis of total amount awarded for the current grant year is:

* Direct Cost:

* Indirect Cost:

Total Cost: \$0.00

The portion of the estimated unexpended balance which has been received by our Institution will be returned to JDRF, with final adjustment if required, upon submission of the final expenditure report due 60 days after the termination date specified above. In no circumstance should the final adjustment denote an unexpended balance less than \$0.00. In such event, we acknowledge that our Institution is responsible for the balance. In the event of an approved transfer of an award to another institution, the equipment necessary for the continuation and success of the project will be transferred to the new grantee institution and title vested in the new institution for use by the designated principal investigator and personnel listed on the project. Use of JDRF funds for costs associated with the transfer of equipment is unallowable. The following equipment costing \$5,000 or more transferring with the project are listed below.

[Add Equipment](#)

[Save Draft](#) [Save](#) [Submit to RO](#)

Step 5. The RO logs into RMS360, selects 'Pending Termination Approval', and 'Opens' the Termination.

Grants & Activities

Proposals - Grants (78) Pending RO Approval (0) Post Award - Pending RO Approval (1) **Pending Termination Approval (1)**

Call Name	Proposal Title	PI	Activity Type	Status	
			Termination	Submitted to RO	Open

Step 6. The RO reviews and completes the termination, and then clicks on the button ‘Submit to JDRF’ at the bottom of the screen.

* Is your award in the last year?: ☒ Yes ☐ No

If this award is transferring to a new institution and you expect to request an NCE your original institution needs to complete an NCE Activity in tandem with the termination activity between 90 – 60 day prior to the end date. Please contact your JDRF administrator to begin work on your No Cost Extension. Please note that all NCE's need to be approved prior to the transfer taking place.

will terminate award as of the termination date specified above and agrees to relinquish all claims to any unexpended and uncommitted funds remaining in the grant as of that date. The estimated unexpended balance on the above-specified termination date calculated on the basis of total amount awarded for the current grant year is:

* Direct Cost:

* Indirect Cost:

Total Cost: \$0.00

The portion of the estimated unexpended balance which has been received by our Institution will be returned to JDRF, with final adjustment if required, upon submission of the final expenditure report due 60 days after the termination date specified above. In no circumstance should the final adjustment denote an unexpended balance less than \$0.00. In such event, we acknowledge that our Institution is responsible for the balance. In the event of an approved transfer of an award to another institution, the equipment necessary for the continuation and success of the project will be transferred to the new grantee institution and title vested in the new institution for use by the designated principal investigator and personnel listed on the project. Use of JDRF funds for costs associated with the transfer of equipment is unallowable. The following equipment costing \$5,000 or more transferring with the project are listed below.

[Add Equipment](#)

I am the individual identified below and am authorized on behalf of my Institution to submit to JDRF the request for award termination.

* Authorized signing official full name

* Authorized signing official title

* Institutional Email Address

* Execution date

[Save](#) [Submit to JDRF](#) [Send back to PI](#)

13. Intellectual Property

i. How do I add Intellectual Property?

Roles: The following steps are to be completed by the Technology Transfer Officer (TTO).

Technology Transfer Officer:

Step 1. The TTO logs in to RMS360 and clicks the “Create IP” button

Christine Dredger

Home

Welcome to RMS360

Welcome to RMS360, JDRF International's Research Management System!

Please click on a tab below to do the following:
Proposals-Grants | View all grants where you have been assigned the Technology Transfer Office contact and select the "Create IP" button to submit Intellectual Property
Intellectual Property | View draft and submitted IP

The Technology Transfer Office contact is added to an award during Activation. If a TTO contact should be added to an award at any other time, please contact the appropriate [JDRF Program Administrator](#).
 For any non-grant-specific inquiries or issues, please contact SmartSimple Support Services via email support@smartsimple.com or phone (866)239-0991. Support hours are Monday through Friday between 8:00am and 9:00pm US Eastern Standard Time.

My Grants & Intellectual Property

Proposals-Grants (1)

Intellectual Property (0)

#	Submission Number	Principal Investigator	Research Body	Proposal Title	Call Name	Mechanism	Status	View Grant	Intellectual Property
1	Submission Number: 201305211	Zenia Dacio-Mesina	University of JDRF	TEST	FY18 Postdoctoral Fellowship (PDF)	Postdoctoral Fellowship	Proposal - Draft	View	Create IP

Grant Key:

Step 2. A new window will open where you can create intellectual property

Christine Dredger

Home

RMS360° - Activity

Type: Intellectual Property

Status:

Created/Submitted By: Christine Dredger

Print Preview: [Open](#)

* Has a patent been filed?: --Select One--

* Have any licenses been executed or are there any plans to license the IP?: --Select One--

License Upload: Click Save before adding attachment

License Information: ☐ Exclusive ☐ Non-Exclusive

Effective Date: yyyy-mm-dd

* Brief Description:

500 words left

* Are any products or technologies in development?: --Select One--

IP Disclosure Upload: Click Save before adding attachments

[Save Draft](#)
[Submit](#)

Step 3. The TTO will complete the required fields, and once complete, the 'Save Draft' button should be selected at the bottom of the screen.

The screenshot displays the 'RMS360° - Activity' form within the JDRF RMS360° system. The form is titled 'RMS360° - Activity' and shows various fields for intellectual property information. The 'Save Draft' button at the bottom is highlighted with a red box.

Form Fields and Options:

- Type:** Intellectual Property
- Status:**
- Created/Submitted By:** Christine Dredger
- Print Preview:** [Open](#)
- * Has a patent been filed?:** --Select One--
- * Have any licenses been executed or are there any plans to license the IP?:** --Select One--
- License Upload:** Click Save before adding attachment
- License Information:** ☐ Exclusive ☐ Non-Exclusive
- Effective Date:** yyyy-mm-dd
- * Brief Description:**
500 words left
- * Are any products or technologies in development?:** --Select One--
- IP Disclosure Upload:** Click Save before adding attachments

Buttons: [Save Draft](#) [Submit](#)

Step 4. Once the required files have been uploaded, the TTO will select the submit button to formally submit to JDRF.

JDRF RMS360
APPROVING UNUSUAL CAREING TIME SUBMITTERS

Christine Dredger Home

RMS360 - Activity

Type: Intellectual Property

Status:

Created/Submitted By: Christine Dredger

Print Preview: [Open](#)

* Has a patent been filed?:

* Have any licenses been executed or are there any plans to license the IP?:

License Upload: Click Save before adding attachment

License Information: ☐ Exclusive ☐ Non-Exclusive

Effective Date:

* Brief Description:
497 words left

* Are any products or technologies in development?:

IP Disclosure Upload: Click Save before adding attachments

[Save Draft](#) [Submit](#)