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**
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    - ii. How do I reset my password?
    - iii. How do I change my contact information in RMS360?

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3. **Activations and Renewals**
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6. **Milestones**
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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. <u>Termination</u>
   i. How do I complete the termination activity?

13. <u>Intellectual Property</u>
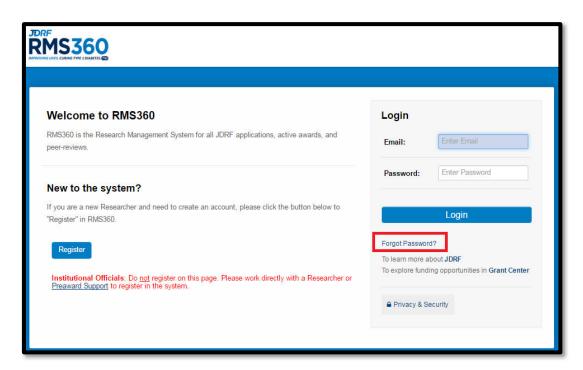   i. How do I add Intellectual Property?

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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.

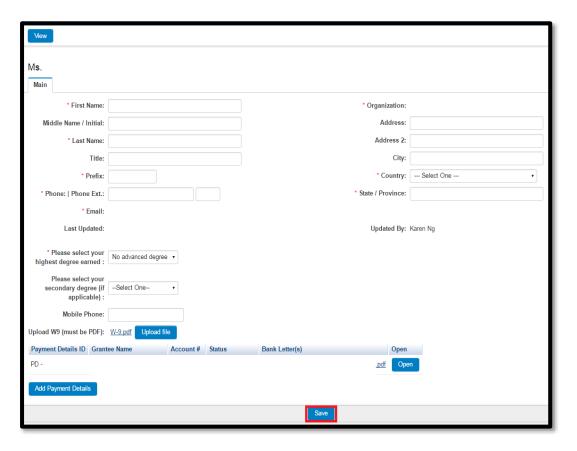**Step 2.** On the home page, click on 'My Profile' in the upper right-hand corner.

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

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

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.
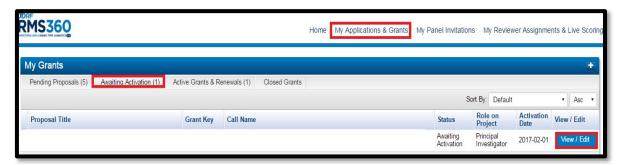

If your TTO contact does not appear in the menu, select the *Click here to create a TTO* link.
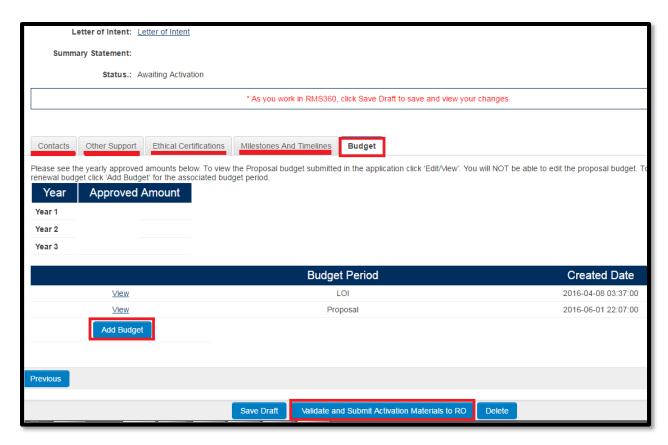

ii. How do I submit an Activation?

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.

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.

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**

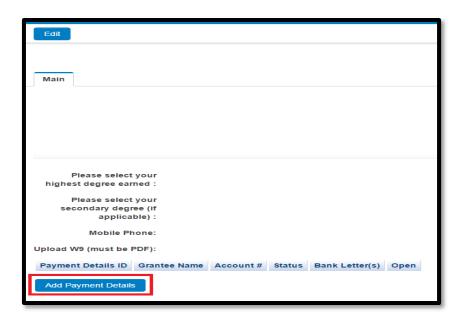   i.   **How do I add Payment Details?**

       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
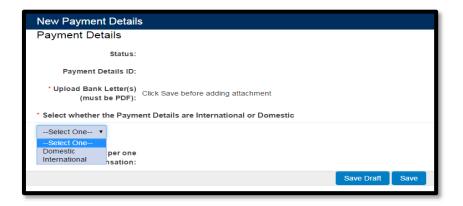

Step 2. Click on "Add Payment Details."

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.

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?

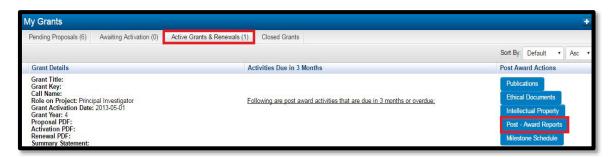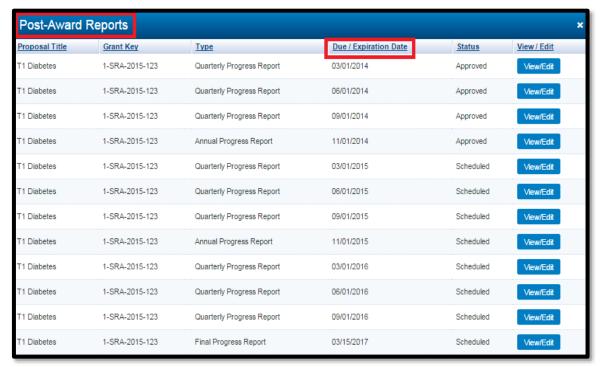Roles: The following steps are for the Principal Investigator (PI), Research Officer (RO), and Financial Officer (RO).

PI: The PI can view all due dates for Post-Award Reports by logging in to RMS360 and selecting "Post-Award Reports".
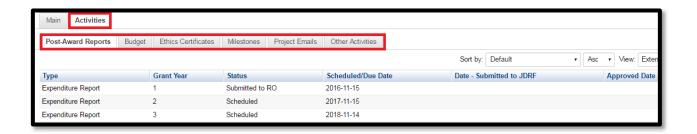
RO: The RO can view due dates/submission dates for expenditure reports and other documents by selecting the Proposals – Grants tab, clicking on the View button and selecting the Activities tab. The RO will coordinate with the PI to be informed of the due dates or submissions for Post-Award Reports. The 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: Exten

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?

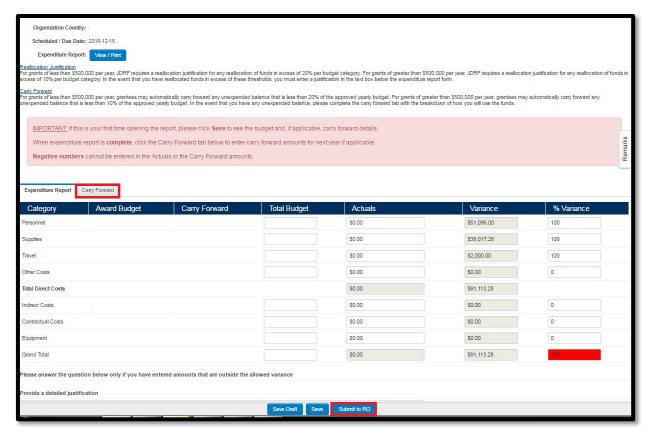Roles: The following steps are to be completed by the Finance Officer (FO) and Research Officer (RO):

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.

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:

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

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]
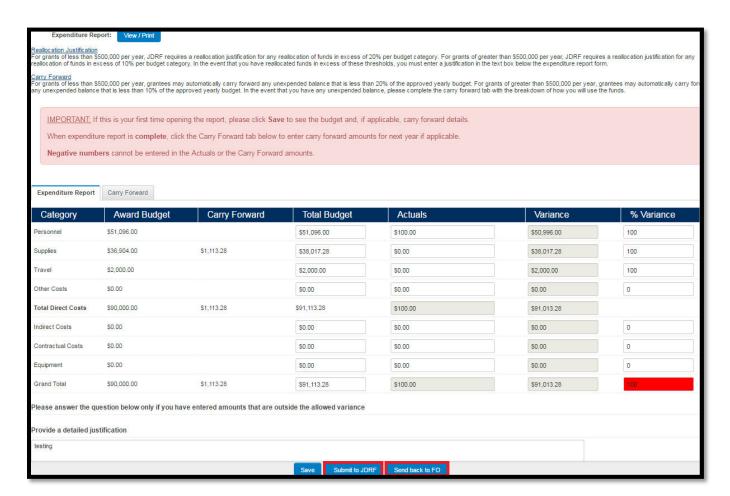
Reallocation Justification
For grants of less than $500,000 per year, JDRF requires a reallocation justification for any reallocation of funds in excess of 20% per budget category. For grants of greater than $500,000 per year, JDRF requires a reallocation justification for any reallocation of funds in 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
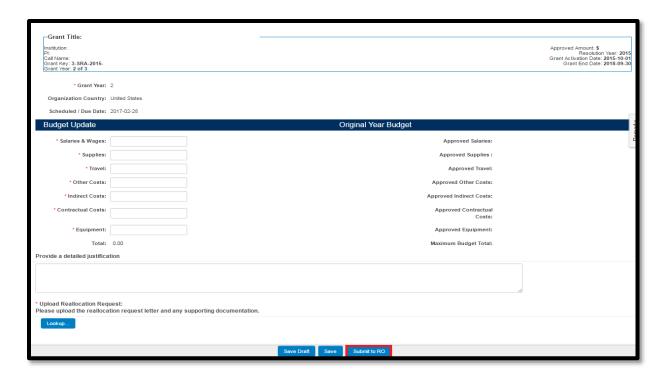
i. How do I request/submit a budget update?
Roles: The following steps are to be completed by the Principal Investigator (PI) and Research Officer (RO).

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.

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

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

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

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.

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
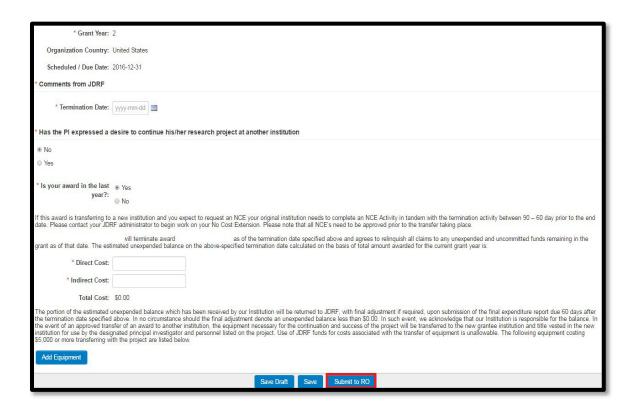
i. How do I complete the termination activity?
Roles: The following steps are to be completed by the Principal Investigator (PI) and Research Officer (RO).

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".

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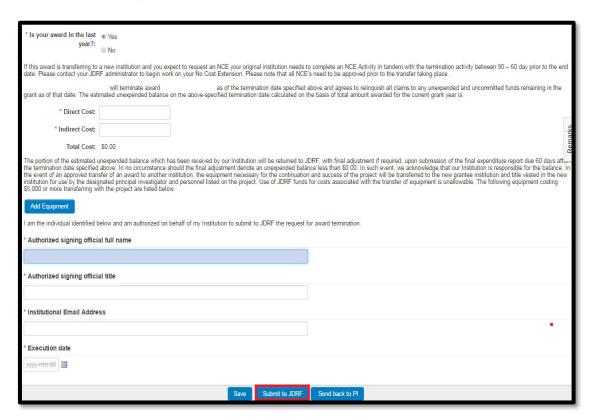

Step 5. The RO logs into RMS360, selects 'Pending Termination Approval', and 'Opens' the Termination.

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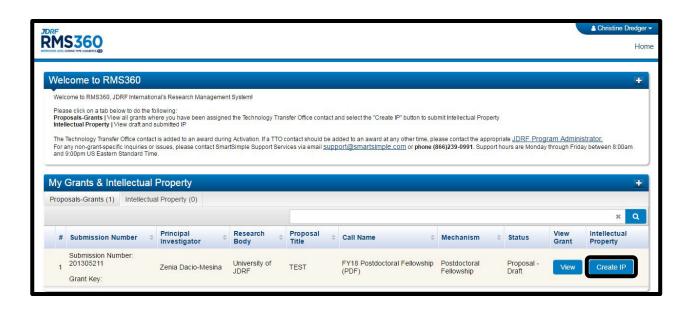

13. Intellectual Property

i. How do I add Intellectual Property?

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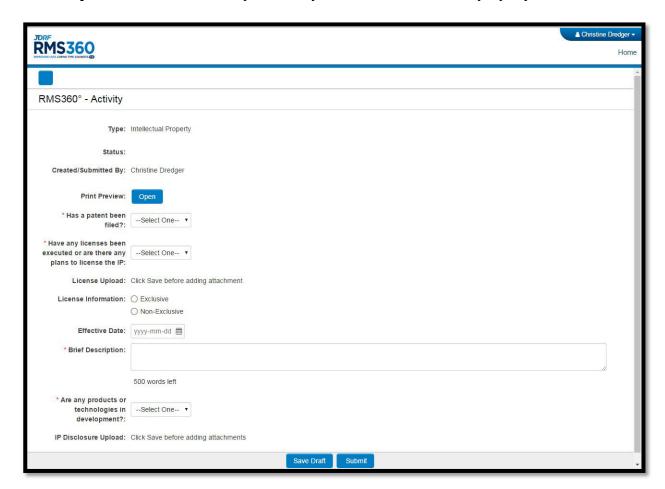
Technology Transfer Officer:

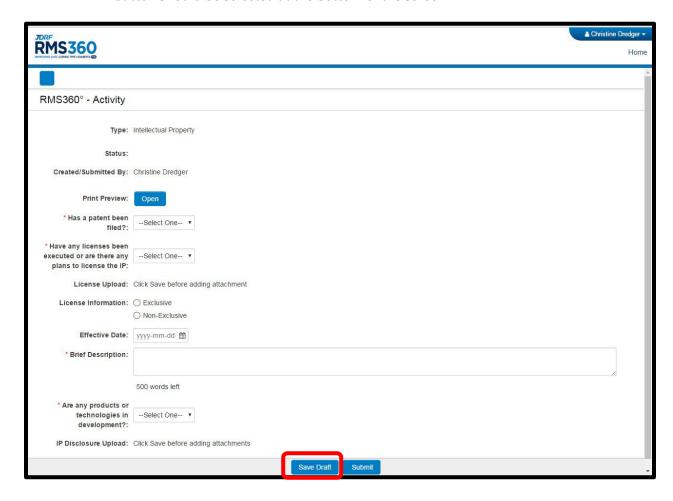**Step 1**. The TTO logs in to RMS360 and clicks the "Create IP" button

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

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.

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