JDRF Operations External FAQs
Preaward and Postaward
RMS360 Preaward FAQ

Application Content

1. How do I apply for a grant?
2. How do I add my RO (Research Office contact) and FO (Finance Officer) to a proposal?
3. How can I add include supplemental materials with my application?
4. Should I include my Biosketch with my additional attachments?
5. Should I include the Biosketch of my Co-PIs and Key Personnel?

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1. How do I submit my LOI or EOI application to JDRF?
2. How do I submit my full proposal to JDRF?
3. I prematurely submitted my proposal to the RO, what should I do?

Application Content

1. How do I apply for a grant?

Under the Funding Opportunities tab in RMS360, select the Apply Now button.
2. How do I add my RO (Research Office contact) and FO (Finance Officer) to a proposal?

Under the Contacts tab of the online application, select your RO and FO from the appropriate dropdown menus.

If your RO or FO contact does not appear in the menu, select the Click here to create an RO/FO link.

After you create an RO or FO account, a list of previously registered research officer’s from your institution will appear. Please contact one of the listed research office contacts and ask them to log into their RMS360 account to approve the newly registered RO or FO.

If you are having trouble getting in contact with your institution’s registered research officers or if there aren’t any listed in our system, please email preawardsupport@jdrf.org to approve the RO or FO account.
After a research officer approves your RO or FO in the system, you will be able to add them to your application. If the research officer does not complete the approval process, then the newly registered RO or FO will not appear in the appropriate dropdown menu.

3. **How can I add include supplemental materials with my application?**
   Please upload any additional documents you would like to include in your application under the *Additional Attachments* tab. *Note:* only unlocked PDFs are permitted.

4. **Should I include my Biosketch with my additional attachments?**
   In order to submit an application, it is required that you check the box next to “My Biosketch is up to date” under the *Contacts* tab. This refers to the biosketch that must be uploaded into your researcher profile. By uploading the biosketch to your profile and checking the box in the application, the biosketch from your profile will automatically append itself to your proposal.

5. **Should I include the Biosketch of my Co-PIs and Key Personnel?**
   Since your Co-PIs must be registered in RMS360 in order to associate them with an application, they must also have an up to date biosketch in their researcher profile. Like the PI biosketch, the Co-PI biosketch will automatically append itself to the proposal.
Unlike Co-PIs, **Key Personnel** are not required to be registered in RMS360 so they will not have a researcher profile that links to the application. Please upload faculty-level key personnel biosketches either under the *Additional Attachments* tab for a full proposal or append to the Research Plan and LOI.

### Submission Process

1. **How do I submit my LOI or EOI application to JDRF?**
   
   To complete the online submission for an LOI or EOI application, the PI will click the *Submit LOI* button.

2. **How do I submit my full proposal to JDRF?**
   
   The full proposal submission process has two necessary steps:
   - The PI submits an application to their Research Office (RO)
● The RO approves the budget from the *Pending Budget Approval* tab, and formally submits the proposal to JDRF from the *Pending RO Approval* tab.

3. I prematurely submitted my proposal to the RO, what should I do?
   The RO has the ability to send the proposal back to the PI. Please reach out to the RO and either ask them to update the proposal or send it back to the PI so they may revise the submission and resubmit to the RO.
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 orange 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 User Guide

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Accounts Log In and Password

1. 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.

2. How do I reset my password?
   If you forget your password, you may reset your password from the login page of RMS360 by selecting the “Forgot your password” link. Your username is your email address.

3. How do I access my username?
   If you forget your username, you may retrieve your username from the login page of RMS360 by selecting the “Forgot your username” link. Your username is your email address.

4. 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.
Roles in RMS360

1. **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.

2. **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.

3. **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.

Activations and Renewals

1. **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 and selects “Activation”, and then selects the blue ‘View/Edit’ button.

   **Step 2.** The PI completes all the information requested on each tab – Contacts, Other Support, Ethical Certifications, Milestones and Timelines 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 and audit details. See the tabs labelled, “Pending RO Approval”, “Pending Budget Approvals” and the blue Edit/Submit button.

2. 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.

3. 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 and selects “Active Grants and Renewals”

   Step 2. The PI locates and clicks the applicable renewal link under “Activities due in 3 months or overdue”

   Step 3. See question, “How do I submit an Activation?”, and follow the steps starting at #2.
Payment Details

1. **How do I add Payment Details?**
   
   Roles: The following steps are to be completed by the Research Officer (RO).
   
   **Step 1.** First, click on 'My Profile'.
   
   **Step 2.** Next, click on the “Transactions” tab, then the “Payment Details” tab.
   
   **Step 3.** Select “New” [make sure you are clicking on the symbol, “+”]. A new window will open where you can enter new Payment Details. After you have entered these details, make sure to click “Save Draft”. After saving these details, they will be available in the dropdown under the “payment details” tab when submitting activation/renewal materials (you should see the saved details instead of “select one”).

Ethicals

1. **How do I add an Ethical?**
   
   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 Ethicals button on the right.
Step 2. After you click on the ‘Ethicals’ 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)].

Terms and Conditions

1. How do I view the Terms and Conditions (T&Cs) of the award?

Roles: The following steps are for the Research Officer (RO).

The terms and conditions are made available to the RO at the time of an activation or renewal, in which the RO reviews and agrees via an electronic signature to JDRF’s T&Cs. If the RO wishes to view the T&Cs after a grant has been activated or renewed, the RO must follow the steps below.
Step 1. The RO logs in to RMS360, clicks on the “Proposals/Grants” Tab and selects the award’s ‘Project Title’ to view the T&Cs.

Step 2. Once the award page loads, the ‘Payment Details’ tab must be selected and the ‘Terms and Conditions’ can be found towards the bottom of the page.

Milestones

1. How do I add milestones to my activation?
   Roles: The following steps are for the Principal Investigator (PI).
Step 1. Log into RMS360 and navigate to the ‘Activations’ tab and click on the ‘View/Edit’ button.

Step 2. Once in the Activation, navigate to the ‘Milestones’ tab and click on the ‘Add’ button.

Step 3. A new window will pop up – enter the information regarding the milestone (Milestone Description, Amount, Original Projected Completion Date) and click on ‘Save’.
Step 4. After clicking on 'Save', close the pop up window to go back to the main Activation screen.

Step 5. If using Google Chrome, right-click, then choose 'Reload Frame'. (If using Mozilla Firefox, right-click, then choose 'This Frame', then 'Reload Frame').

Step 6. Navigate back to the 'Milestones' tab – you should see the milestone you just added. If edits are required, click on the blue 'Edit' button or 'Delete' if you wish to delete a milestone.
Step 7. Continue this process until all milestones are added.

Step 8. If PI needs to communicate with the JDRF Scientific Program Manager regarding milestones, the PI can use the “Milestones Communication” text box. Type the necessary communication to JDRF, then click on ‘Save Comments’, then ‘Email Comments to JDRF Scientific Staff’.

2. 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.

Monitoring and Reporting

1. 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 portal does not show the report due dates as all reports are either initiated in the PI or FO portal. Instead, the RO will coordinate with the PI to be informed of the due dates for the Post-Award Reports. The RO will coordinate with the FO to be informed of the due dates for the Expenditure Reports.

**FO:** The FO can view all due dates for Expenditure Reports by logging in to RMS360 and selecting “Expenditure Reports”.
2. **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.** Select the tab marked ‘Expenditure Reports’. Click on ‘Expenditure Reports’:
Step 2.  A new window will pop up and you will see a list of Expenditure Reports due. Click on the blue ‘Open’ button to the right to open an expenditure report.

![Image of RMS300® interface showing a list of Expenditure Reports]

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:

![Image of RMS300® interface showing the Carry Forward tab]

Step 4. The RO reviews and submits the Expenditure Report to JDRF.
Budget Update

1. 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 email first email the JDRF Grant Administrator to request permission to complete a budget update.

   **Step 2.** The JDRF Grant Administrator will email the PI once the budget update is created in RMS360.

   **Step 3.** The PI logs in to RMS360 and selects “Budget Update”.

   **Step 4.** The PI completes the budget update and once that is done, the PI clicks on the button at the bottom of the screen ‘Submit to RO’.
Step 5.  The RO logs into RMS360, selects ‘Post-Award – Pending RO Approval, and ‘Opens’ the budget update.

![Image of budget update dialog box]

Step 6.  The RO reviews the budget update. If revisions are required, click on the button at the bottom of the screen, “Send back to PI”. If acceptable, click “Submit to JDRF”.

![Example of a budget update form]
No-Cost Extensions

1. 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, contact the JDRF Grant Administrator and notify them that you do not see the link.

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

Step 3. PI Completes Web Progress Report and No-cost Extension fields and clicks “Submit to RO”

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

Step 4. 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”.

Step 6. No-cost Extension Request has been submitted successfully.

Transfers

1. 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 Grant Administrator and request a transfer as soon as the PI becomes knowledgeable of his/her transfer.

   Step 2. The JDRF Grant 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.

Transition

1. 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 Grant Administrator to request a transition award, as soon as the PI becomes knowledgeable of his/her new faculty appointment.

   Step 2. The JDRF Grant 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.
1. 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 Grant Administrator to initiate a termination.

**Step 2.** The JDRF Grant 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 once that is done, the PI clicks 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 the termination, and then clicks on the button at the bottom of the screen, ‘Submit to JDRF’.

**Intellectual Property**

1. **How do I add Intellectual Property?**
   
   **Roles:** The following steps are to be completed by the Principal Investigator (PI) or Research Officer (RO).

   **Principal Investigator:**

   **Step 1.** The PI logs in to RMS360 and selects “Intellectual Property”.

   **Notes:**

   - **Post Award Actions**
   - **Publications**
   - **Ethics**
   - **Intellectual Property**
   - **Post-Award Reports**
   - **Milestone Schedule**
Step 2. A new window will open where you can select the ‘Create New’ button.

Step 3. The PI will complete the required fields, and once complete, the ‘save’ button should be selected at the bottom of the screen.

Step 4. Once the required files have been uploaded, the PI will select the submit button to formally submit to JDRF.
Research Officer:

Step 1. The RO logs in to RMS360 and selects “Transactions” under My Profile link. Under the Intellectual Property tab, select “New” to add details [make sure you are clicking on the symbol, “+”].

Step 2. The RO will complete the required fields, and once complete, the ‘save’ button should be selected at the bottom of the screen.
Step 3. Once the required files have been uploaded, the RO will select the submit button to formally submit to JDRF.