



Breakthrough T1D Operations External FAQs
Preaward and Postaward



RMS360 Preadward 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?

Submission Process

1. How do I submit my LOI or EOI application to Breakthrough T1D?
2. How do I submit my full proposal to Breakthrough T1D?
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.

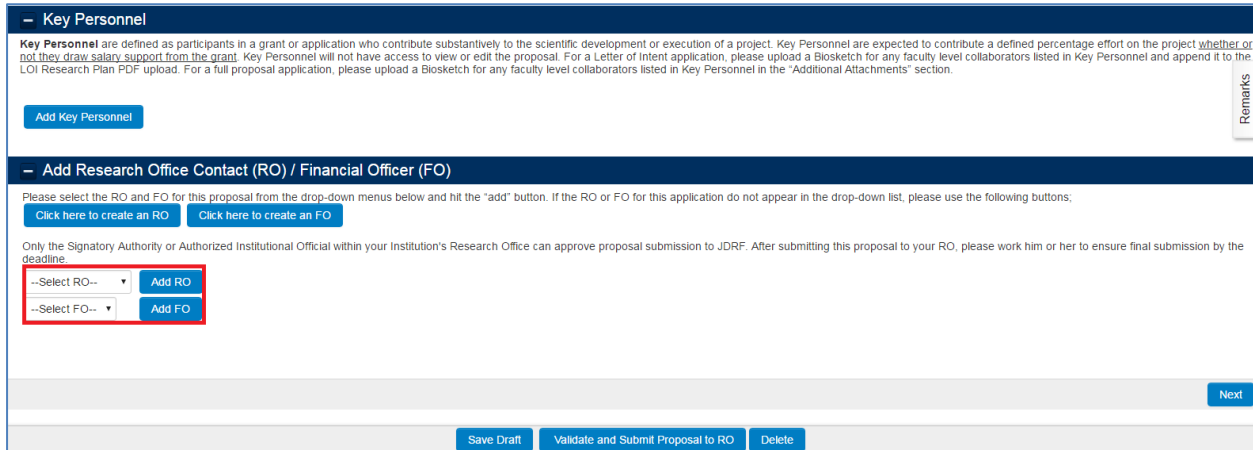
The screenshot shows the RMS360 web interface. At the top, there is a navigation bar with links for Home, My Applications & Grants, My Panel Invitations, My Reviewer Assignments & Live Scoring, and Pending RO and F. Below this is a 'Welcome to RMS360' banner with instructions for new users and links to 'My Applications & Grants', 'My Panel Invitations', and 'My Reviewer Assignments & Live Scoring'. A search bar is present in the top right of the main content area.

The 'Funding Opportunities' section is highlighted with a red box. It contains a table with the following data:

Call Name	Goal Area	Call Details	Call Document	Apply
Improved Autoantibody Assays for Predicting Risk for Type 1 Diabetes (T1D)	Prevention	Full Proposal Deadline: 02/10/2017 Funding Notification Date: May - 2017 Earliest Start Date: July - 2017	Download	Apply Now

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.



Key Personnel

Key Personnel are defined as participants in a grant or application who contribute substantively to the scientific development or execution of a project. Key Personnel are expected to contribute a defined percentage effort on the project whether or not they draw salary support from the grant. Key Personnel will not have access to view or edit the proposal. For a Letter of Intent application, please upload a Biosketch for any faculty level collaborators listed in Key Personnel and append it to the LOI Research Plan PDF upload. For a full proposal application, please upload a Biosketch for any faculty level collaborators listed in Key Personnel in the "Additional Attachments" section.

Add Key Personnel

Add Research Office Contact (RO) / Financial Officer (FO)

Please select the RO and FO for this proposal from the drop-down menus below and hit the "add" button. If the RO or FO for this application do not appear in the drop-down list, please use the following buttons:

Click here to create an RO Click here to create an FO

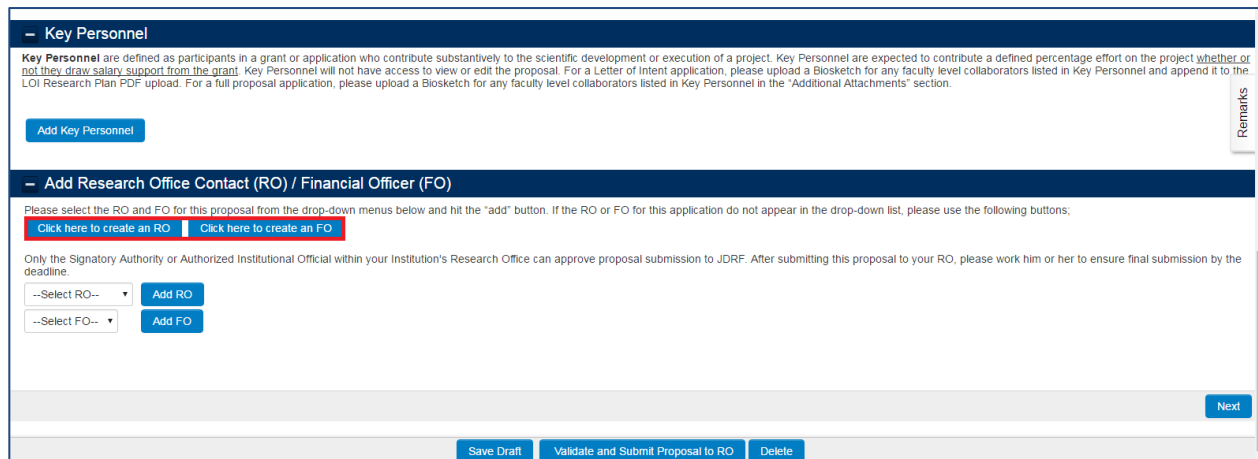
Only the Signatory Authority or Authorized Institutional Official within your Institution's Research Office can approve proposal submission to JDRF. After submitting this proposal to your RO, please work him or her to ensure final submission by the deadline.

--Select RO-- Add RO
--Select FO-- Add FO

Next

Save Draft Validate and Submit Proposal to RO Delete

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



Key Personnel

Key Personnel are defined as participants in a grant or application who contribute substantively to the scientific development or execution of a project. Key Personnel are expected to contribute a defined percentage effort on the project whether or not they draw salary support from the grant. Key Personnel will not have access to view or edit the proposal. For a Letter of Intent application, please upload a Biosketch for any faculty level collaborators listed in Key Personnel and append it to the LOI Research Plan PDF upload. For a full proposal application, please upload a Biosketch for any faculty level collaborators listed in Key Personnel in the "Additional Attachments" section.

Add Key Personnel

Add Research Office Contact (RO) / Financial Officer (FO)

Please select the RO and FO for this proposal from the drop-down menus below and hit the "add" button. If the RO or FO for this application do not appear in the drop-down list, please use the following buttons:

Click here to create an RO Click here to create an FO

Only the Signatory Authority or Authorized Institutional Official within your Institution's Research Office can approve proposal submission to JDRF. After submitting this proposal to your RO, please work him or her to ensure final submission by the deadline.

--Select RO-- Add RO
--Select FO-- Add FO

Next

Save Draft Validate and Submit Proposal to RO Delete

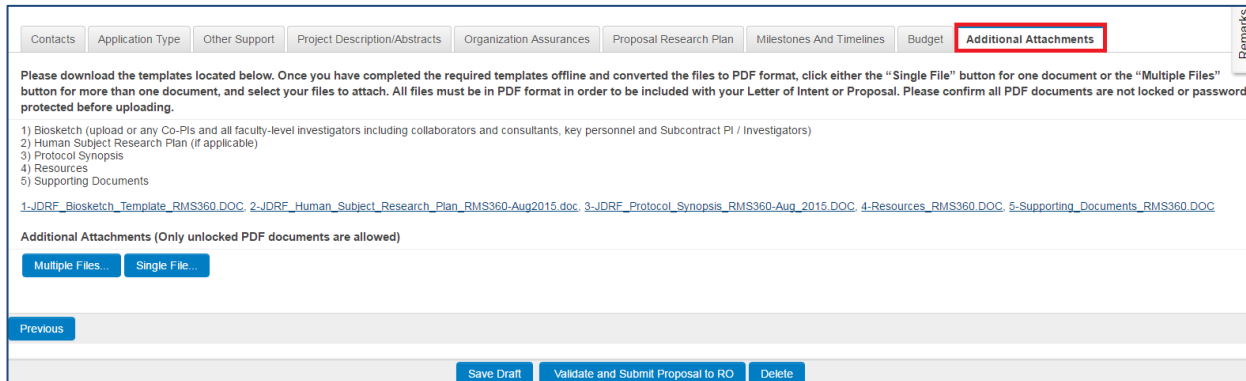
After you create an RO or FO account, a list of previously registered research officer's from your institution will appear. Please contact one of the listed research office contacts and ask them to log into their RMS360 account to approve the newly registered RO or FO.

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@BreakthroughT1D.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?

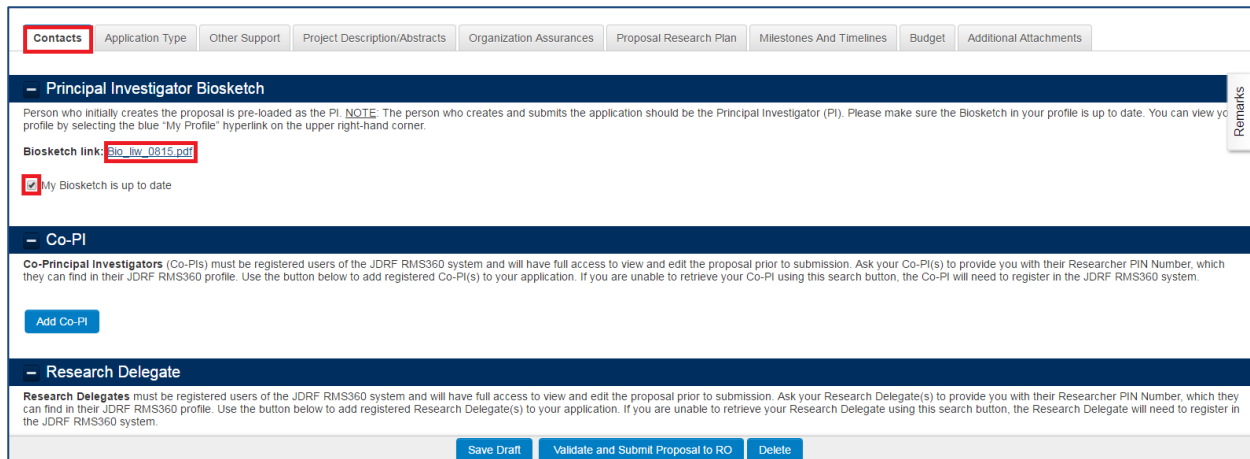
Please upload any additional documents you would like to include in your application under the *Additional Attachments* tab. Note: only unlocked PDFs are permitted.



The screenshot shows the 'Additional Attachments' tab selected in a navigation menu. Below the menu, there is a list of required templates: 1) Biosketch, 2) Human Subject Research Plan, 3) Protocol Synopsis, 4) Resources, and 5) Supporting Documents. A list of downloadable templates is provided with links. Below this, there are buttons for 'Multiple Files...' and 'Single File...'. At the bottom of the form, there are buttons for 'Previous', 'Save Draft', 'Validate and Submit Proposal to RO', and 'Delete'.

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.



The screenshot shows the 'Contacts' tab selected in a navigation menu. The main content area is titled 'Principal Investigator Biosketch' and contains instructions for the PI. A 'Biosketch link' is shown as '30_liv_0815.pdf'. Below this, there is a checkbox labeled 'My Biosketch is up to date' which is checked. Below the PI section, there is a section for 'Co-PI' with an 'Add Co-PI' button. At the bottom, there are buttons for 'Save Draft', 'Validate and Submit Proposal to RO', and 'Delete'.

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.

Contacts	Application Type	Other Support	Project Description/Abstracts	Organization Assurances	Proposal Research Plan	Milestones And Timelines	Budget	Additional Attachments	Remarks
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Please download the templates located below. Once you have completed the required templates offline and converted the files to PDF format, click either the "Single File" button for one document or the "Multiple Files" button for more than one document, and select your files to attach. All files must be in PDF format in order to be included with your Letter of Intent or Proposal. Please confirm all PDF documents are not locked or password-protected before uploading.

- 1) Biosketch (upload or any Co-PIs and all faculty-level investigators including collaborators and consultants, key personnel and Subcontract PI / Investigators)
- 2) Human Subject Research Plan (if applicable)
- 3) Protocol Synopsis
- 4) Resources
- 5) Supporting Documents

1-JDRF_Biosketch_Template_RMS360.DOC, 2-JDRF_Human_Subject_Research_Plan_RMS360-Aug2015.doc, 3-JDRF_Protocol_Synopsis_RMS360-Aug_2015.DOC, 4-Resources_RMS360.DOC, 5-Supporting_Documents_RMS360.DOC

Additional Attachments (Only unlocked PDF documents are allowed)

Multiple Files... Single File...

Previous

Save Draft Validate and Submit Proposal to RO Delete

Submission Process

1. How do I submit my LOI or EOI application to Breakthrough T1D?

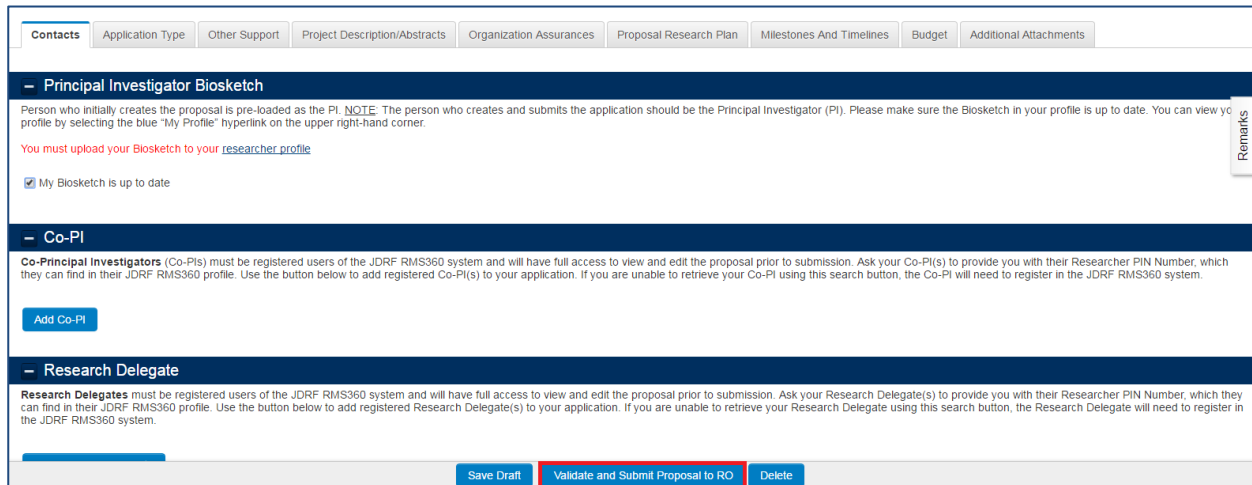
To complete the online submission for an LOI or EOI application, the PI will click the *Submit LOI* button.

RMS360 ^o - Proposal/Grant									
Mechanism: Strategic Research Agreement (SRA)		* Project Start Date: 2016-12-09		* Project End Date: 2017-12-09		* Institution: University of JDRF		* Principal Investigator: Kelbi Culwell	
* Project Title: Testing		Please enter the proposal title, followed by the "Project Start Date" and "Project End Date" and select "Save Draft", in order to initialize your application.							
View/Print LOI: View/Print LOI									
Call Name: Project Concept - All Goal Areas									
Status.: Letter of Intent - Draft									
Submission Number: 201304280									
The deadline for submission is: 08 February, 2017 - 17:00:00 EST									
* As you work in RMS360, click Save Draft to save and view your changes.									
Actions Pending									
Contacts	Application Type	Other Support	Objective and Preliminary Specific Aims	LOI Research Plan	Budget	Additional Attachments			
Save Draft		Submit LOI		Delete					

2. How do I submit my full proposal to Breakthrough T1D?

The full proposal submission process has two necessary steps:

- The PI submits an application to their Research Office (RO)

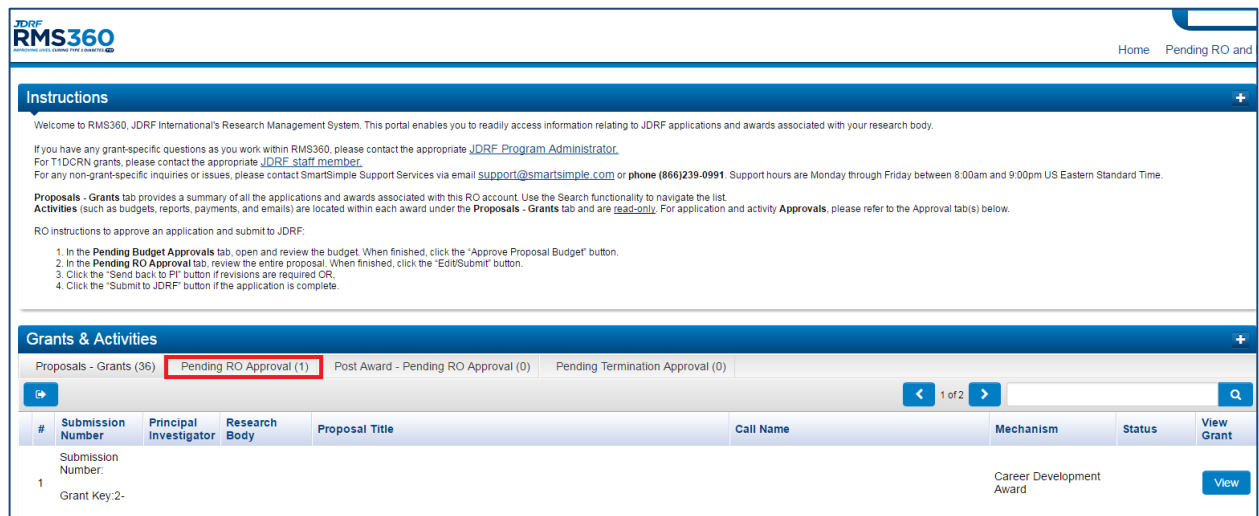


The screenshot shows a web interface with a top navigation bar containing tabs: Contacts, Application Type, Other Support, Project Description/Abstracts, Organization Assurances, Proposal Research Plan, Milestones And Timelines, Budget, and Additional Attachments. The main content area is divided into three sections:

- Principal Investigator Biosketch:** A section with a blue header. Below it, text explains that the person who creates the proposal is pre-loaded as the PI. A note states: "NOTE: The person who creates and submits the application should be the Principal Investigator (PI). Please make sure the Biosketch in your profile is up to date. You can view your profile by selecting the blue 'My Profile' hyperlink on the upper right-hand corner." A red text prompt says: "You must upload your Biosketch to your researcher profile". There is a checkbox labeled "My Biosketch is up to date" which is checked.
- Co-PI:** A section with a blue header. Text explains that Co-Principal Investigators (Co-PIs) must be registered users of the JDRF RMS360 system. A blue button labeled "Add Co-PI" is visible.
- Research Delegate:** A section with a blue header. Text explains that Research Delegates must be registered users of the JDRF RMS360 system. A blue button labeled "Add Research Delegate" is visible.

At the bottom of the form, there are three buttons: "Save Draft", "Validate and Submit Proposal to RO" (highlighted with a red border), and "Delete".

- The RO approves the budget, and formally submits the proposal to Breakthrough T1D from the *Pending RO Approval* tab



The screenshot shows the JDRF RMS360 interface. The top left has the JDRF RMS360 logo. The top right has "Home" and "Pending RO and". Below the navigation bar is an "Instructions" section with a blue header and a plus sign. The main content area contains text about the system and instructions for users. Below this is a "Grants & Activities" section with a blue header and a plus sign. It shows a summary of grants: "Proposals - Grants (36)", "Pending RO Approval (1)", "Post Award - Pending RO Approval (0)", and "Pending Termination Approval (0)". Below this is a table with a search bar and a "1 of 2" indicator. The table has columns: #, Submission Number, Principal Investigator, Research Body, Proposal Title, Call Name, Mechanism, Status, and View Grant. There is one row with the following data:

#	Submission Number	Principal Investigator	Research Body	Proposal Title	Call Name	Mechanism	Status	View Grant
1	Submission Number: Grant Key-2-					Career Development Award		View

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.

JDRF
RMS360

Home Pending RO and FC

View More ▾

1 of 1 < >

Restoring immune regulation in T1D

<p>Mechanism: Innovative Grants</p> <p>* Project Title: <input type="text" value="Testing"/></p> <p>* Institution: <input type="text" value=""/></p>	<p>* Project Start Date: <input type="text" value="2014-03-01"/></p> <p>* Project End Date: <input type="text" value="2015-02-28"/></p> <p>* Principal Investigator: <input type="text" value=""/></p> <p>Last Updated: 2016-10-31 05:19</p>
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View/Print Proposal: [View / Print](#)

Call Name: Innovative Grants/Pilot and Research Tool Grants

Status.: Proposal - Submitted to RO

Submission Number:

Please note comments and/or address any items requested

Remarks

The deadline for submission is: **30 August, 2013 - 17:00:00 EST**

Important Note: Only the Signatory Authority or Authorized Institutional Official within your Institution's Research Office can approve proposal submission to JDRF. From this point on, this contact will be referred to as the RO. After submitting this proposal to your RO, please work with him or her to ensure final submission by the deadline.

*For any text field with an asterisk, if not applicable, please enter not applicable.

Save Draft

Send back to PI



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 Breakthrough T1D.
- 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

Accounts Log In and Password

1. What's the best browser to use with RMS360?
2. How do I reset my password?
3. How do I change my contact information in RMS360?

Roles in RMS360

1. What are the roles and responsibilities of the Principal Investigator (PI)/Researcher?
2. What are the roles and responsibilities of the Research Officer (RO)?
3. What are the roles and responsibilities of the Finance Officer (FO)?
4. What are the roles and responsibilities of the Research Delegate (RD)?
5. What are the roles and responsibilities of the Technology Transfer Office (TTO)?

Activations and Renewals

6. How do I add my TTO (Technology Transfer Officer) to a proposal?
7. How do I submit an Activation?
8. For multi-year grants, what do I need to submit to renew my grant?
9. How do I submit a Renewal Application?

Payment Details

1. How do I add Payment Details?

W9

1. How do I upload a W9 document?

Ethical Documents

1. How do I add an Ethical Document?

Terms and Conditions

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

Milestones

1. How do I add milestones to my activation?
2. How do I make changes to my milestones after my award has been activated/renewed?

Monitoring and Reporting

1. How do I view when my reports are due?
2. How do I submit an Expenditure Report?

Budget Update

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

No-Cost Extensions

1. How do I submit a No-cost Extension?

Transfers

1. How do I request a transfer?

Transition

1. How do I request a transition?

Termination

1. How do I complete the termination activity?

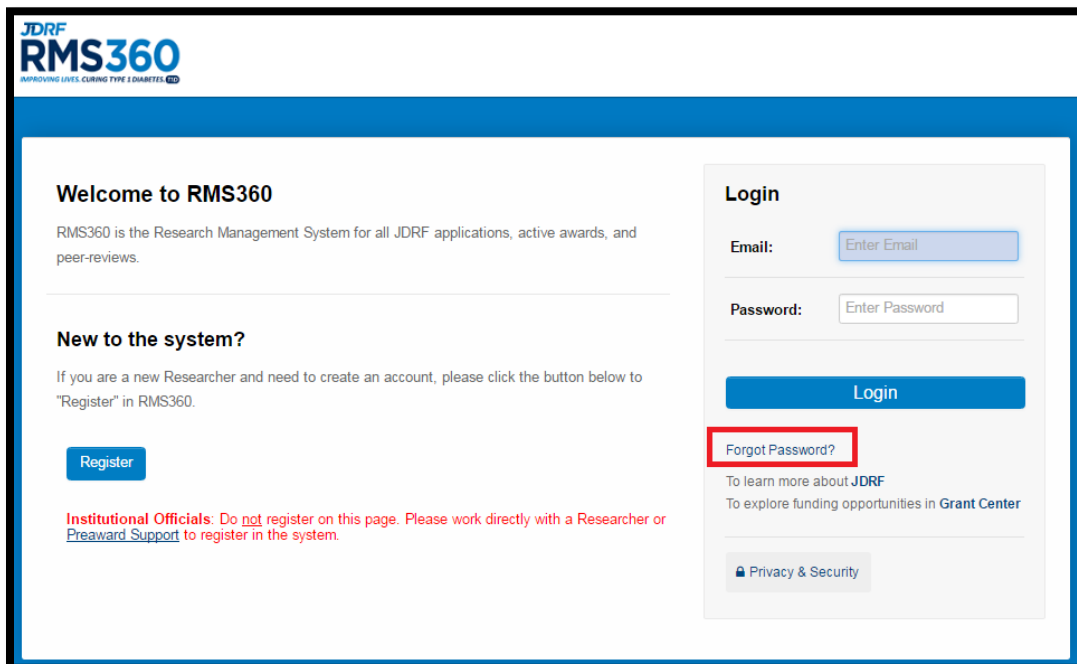
Accounts Log In and Password

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 clicking on the “**Forgot password**” link. Your username is your email address.



The screenshot shows the RMS360 login page. The header includes the JDRF logo and the text 'RMS360 IMPROVING LIVES. CURING TYPE 1 DIABETES.™'. The main content area is divided into two columns. The left column contains a 'Welcome to RMS360' section with a brief description, a 'New to the system?' section with a 'Register' button, and a note for 'Institutional Officials'. The right column contains a 'Login' section with input fields for 'Email' and 'Password', a 'Login' button, a 'Forgot Password?' link (highlighted with a red box), and a 'Privacy & Security' link.

3. 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.

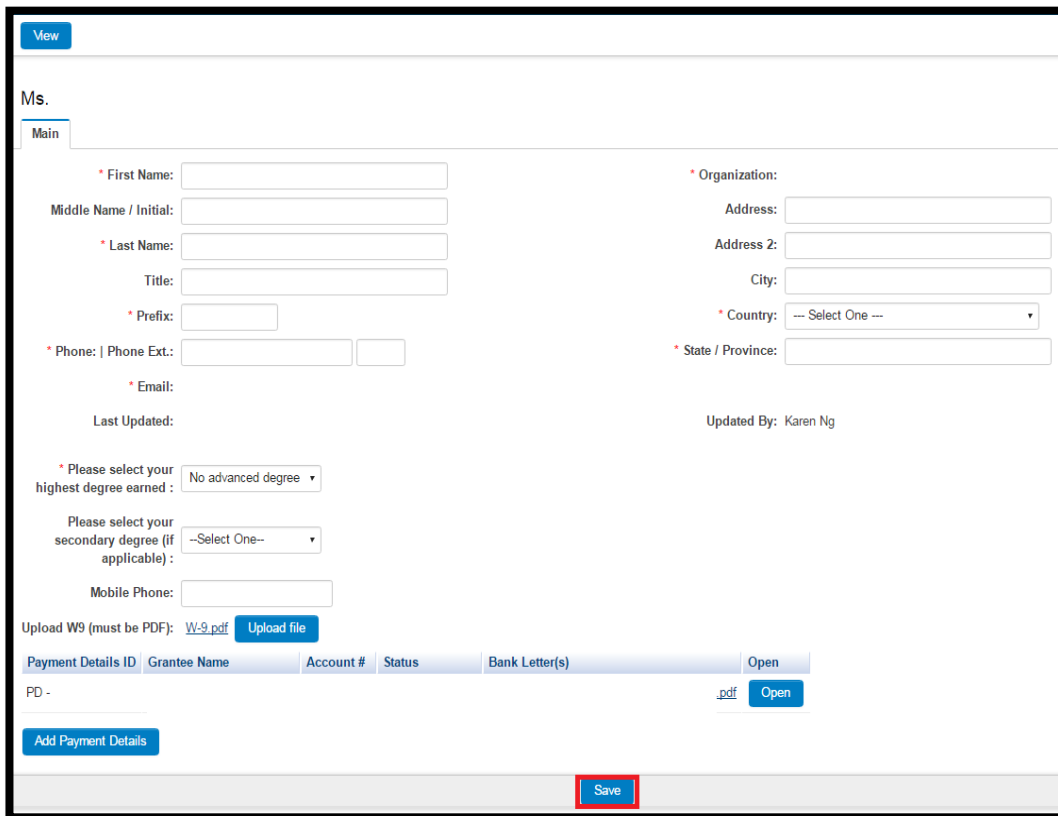
Step 2. On the home page, click on ‘My Profile’ in the upper right-hand corner.



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.



View

Ms.

Main

* First Name:

Middle Name / Initial:

* Last Name:

Title:

* Prefix:

* Phone: | Phone Ext.:

* Email:

Last Updated:

* Please select your highest degree earned:

Please select your secondary degree (if applicable):

Mobile Phone:

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

Payment Details ID	Grantee Name	Account #	Status	Bank Letter(s)	Open
PD -				.pdf	<input type="button" value="Open"/>

Updated By: Karen Ng



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 Breakthrough T1D. 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.

4. 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.

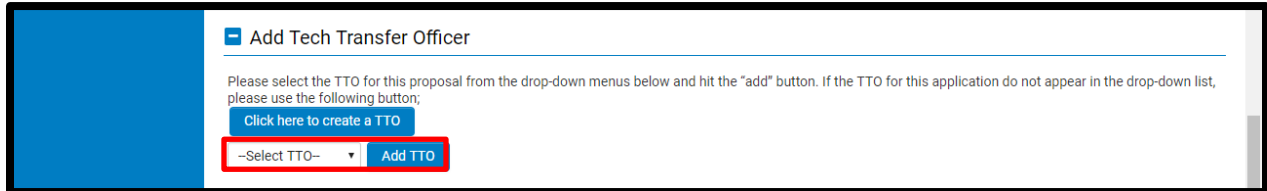
5. What are the roles and responsibilities of the Technology Transfer Office (TTO)?

The Technology Transfer Office contact is designated by the Grantee Institution and is the individual responsible for reporting all Intellectual Property to Breakthrough T1D.

Activations and Renewals

6. 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.



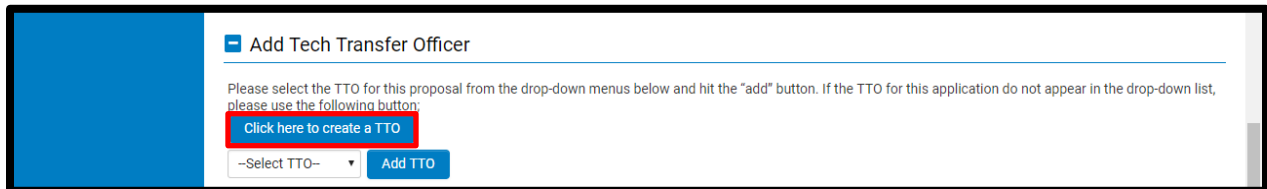
Add Tech Transfer Officer

Please select the TTO for this proposal from the drop-down menus below and hit the "add" button. If the TTO for this application do not appear in the drop-down list, please use the following button;

[Click here to create a TTO](#)

--Select TTO--

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



Add Tech Transfer Officer

Please select the TTO for this proposal from the drop-down menus below and hit the "add" button. If the TTO for this application do not appear in the drop-down list, please use the following button;

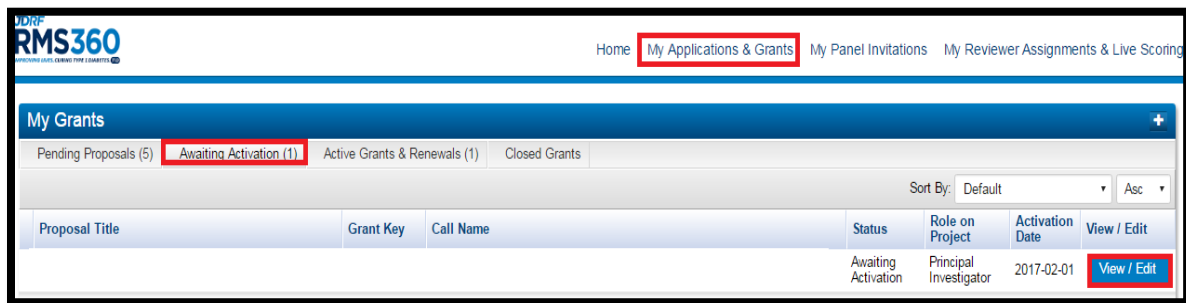
[Click here to create a TTO](#)

--Select TTO--

7. 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.



RMS360 Home [My Applications & Grants](#) My Panel Invitations My Reviewer Assignments & Live Scoring

My Grants Pending Proposals (5) [Awaiting Activation \(1\)](#) Active Grants & Renewals (1) Closed Grants

Sort By: Default Asc

Proposal Title	Grant Key	Call Name	Status	Role on Project	Activation Date	View / Edit
			Awaiting Activation	Principal Investigator	2017-02-01	View / Edit

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.

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 renewal 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

8. For multi-year grants, what do I need to submit to renew my grant?

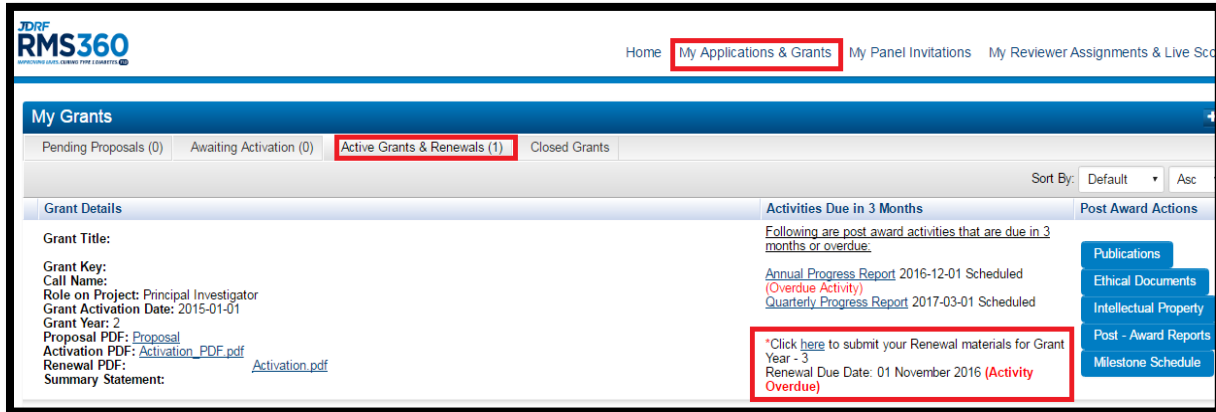
In order to renew funding for a multi-year grant, the following must be submitted:

- 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.

9. 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.



Payment Details

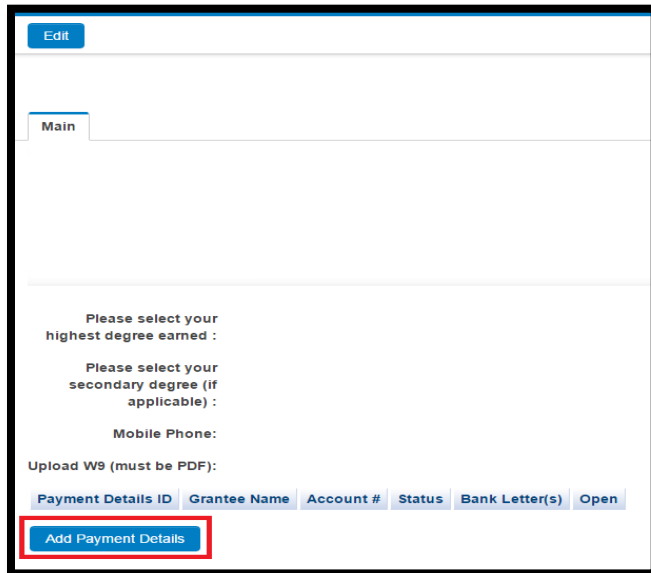
1. How do I add Payment Details?

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

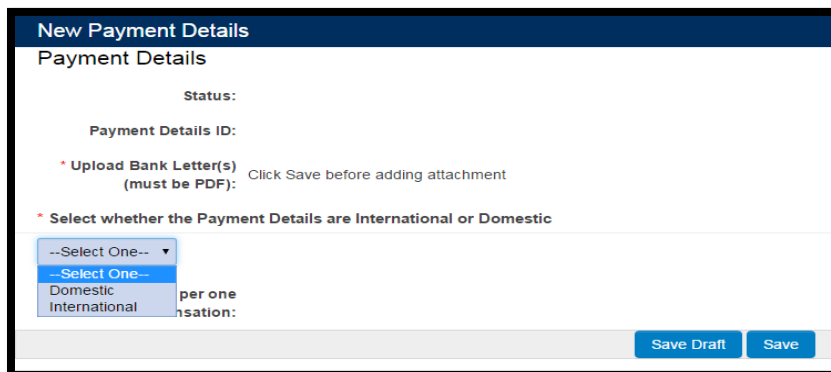


Step 2. Click on “Add Payment Details.”



The screenshot shows a web form with an 'Edit' button at the top left. Below it is a 'Main' tab. The form contains several text prompts: 'Please select your highest degree earned:', 'Please select your secondary degree (if applicable):', and 'Mobile Phone:'. There is also an 'Upload W9 (must be PDF):' section. Below these are several buttons: 'Payment Details ID', 'Grantee Name', 'Account #', 'Status', 'Bank Letter(s)', and 'Open'. At the bottom left, the 'Add Payment Details' button is highlighted with a red rectangular box.

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.



The screenshot shows a 'New Payment Details' form. The title is 'New Payment Details' and the main heading is 'Payment Details'. The form includes a 'Status:' field, a 'Payment Details ID:' field, and a required field for 'Upload Bank Letter(s) (must be PDF):' with a note to 'Click Save before adding attachment'. Below this is a dropdown menu with the instruction '* Select whether the Payment Details are International or Domestic'. The dropdown is currently open, showing options: '--Select One--', 'Domestic', and 'International'. To the right of the dropdown is the text 'per one' and 'nsation:'. At the bottom right of the form are two buttons: 'Save Draft' and '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 transaction:

Save Draft
Save

W9

1. How do I upload a W9 document?

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

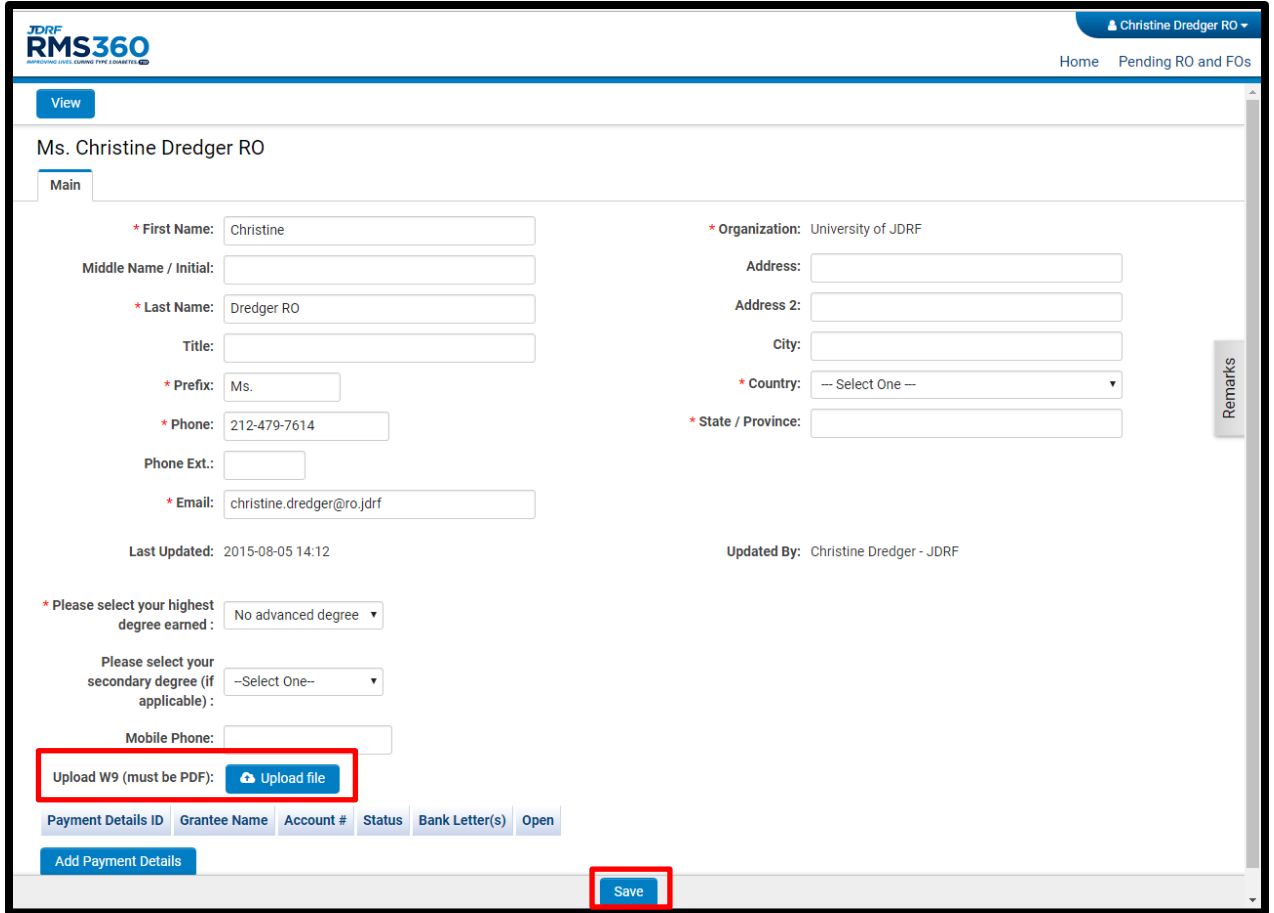
Step 1. See upper right corner hover over RO name and select 'My Profile' under dropdown



Step 2. Click on "Edit"



Step 3. The RO will upload the W9 file by clicking on the "Upload file" button next to where it says "Upload W9 (must be PDF):". The RO will then click "Save."



JDRF RMS360 Christine Dredger RO

Home Pending RO and FOs

View

Ms. Christine Dredger RO

Main

* First Name: Christine
 Middle Name / Initial:
 * Last Name: Dredger RO
 Title:
 * Prefix: Ms.
 * Phone: 212-479-7614
 Phone Ext.:
 * Email: christine.dredger@ro.jdrf

* Organization: University of JDRF
 Address:
 Address 2:
 City:
 * Country: -- Select One --
 * State / Province:

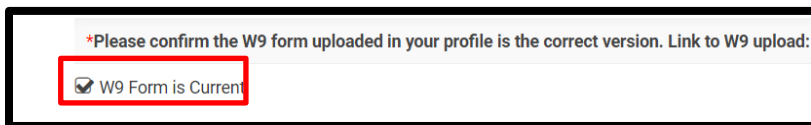
Last Updated: 2015-08-05 14:12 Updated By: Christine Dredger - JDRF

* Please select your highest degree earned: No advanced degree
 Please select your secondary degree (if applicable): --Select One--
 Mobile Phone:

Upload W9 (must be PDF):

Payment Details ID Grantee Name Account # Status Bank Letter(s) Open

Step 4. The RO must confirm within an application that the W9 uploaded in their profile is current. This update must be made from the RO profile.



*Please confirm the W9 form uploaded in your profile is the correct version. Link to W9 upload:

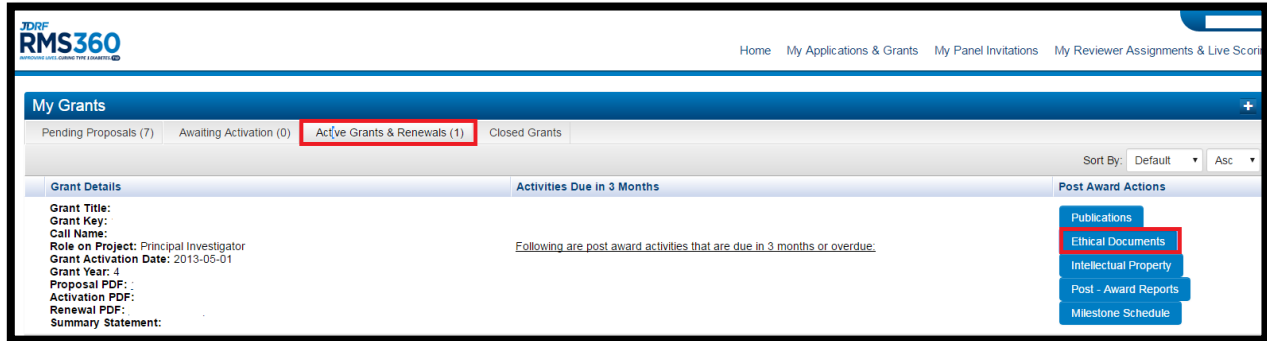
W9 Form is Current

Ethical Documents

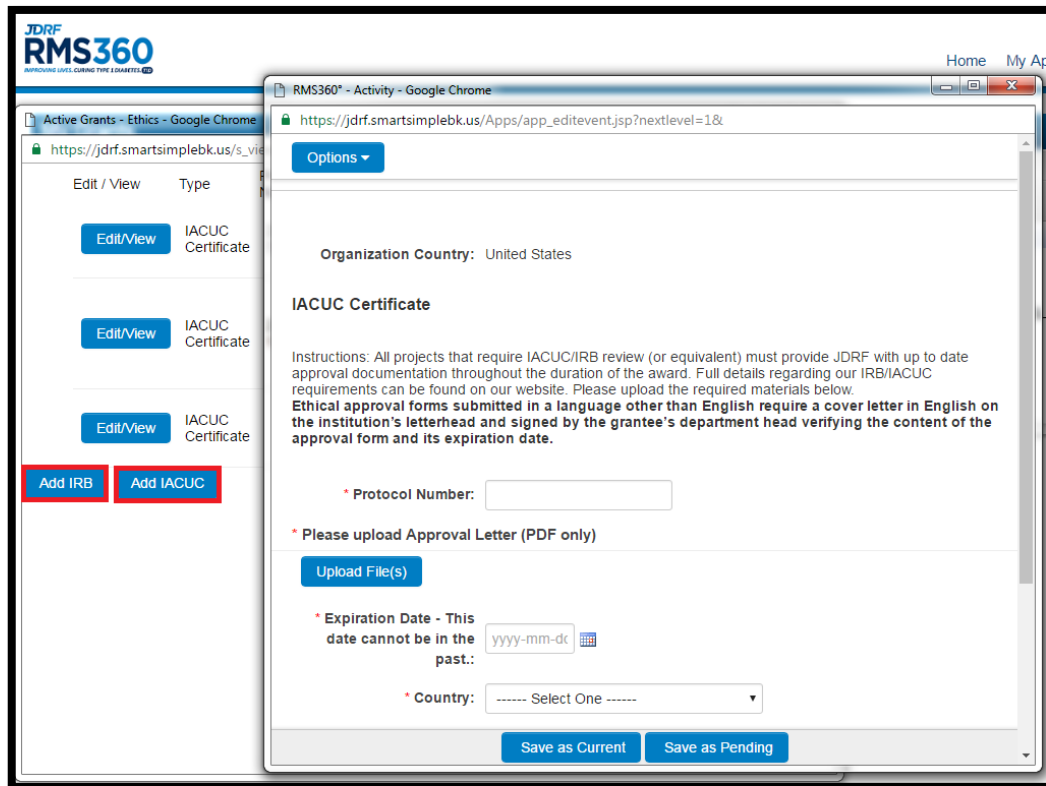
1. How do I add an Ethical Document?

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)].





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 Breakthrough T1D'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 clicks on the View button.

The screenshot shows the RMS360 interface. At the top, there's a navigation bar with 'Home' and 'Pending RO and FO'. Below that is a 'Welcome to RMS360' banner with instructions. The main section is 'Grants & Activities', which has a sub-tab 'Proposals - Grants (2)'. Below this is a table with columns: #, Submission Number, Principal Investigator, Research Body, Proposal Title, Call Name, Mechanism, Status, and View Grant. The first row shows a submission with a 'View Grant' button highlighted in red.

#	Submission Number	Principal Investigator	Research Body	Proposal Title	Call Name	Mechanism	Status	View Grant
1	Submission Number: 201301703					Strategic Research Agreement (SRA)	Active Grant	View

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.

The screenshot shows the 'Payment Details' tab selected in the RMS360 interface. It includes a form for entering payee information (Name, Address, City, State, Country, Postal Code) and a section for agreeing to terms and conditions. A table lists the terms and conditions files:

#	File Name	Size	Date
1.	Terms_and_Conditions_(SGK_2-10)_S06085061.pdf	138 KB	2015-04-28 17:52
2.	V_1_Terms_and_Conditions_	120 KB	2015-04-28 17:52
3.	V_2_Terms_and_Conditions_	116 KB	2015-04-28 17:52

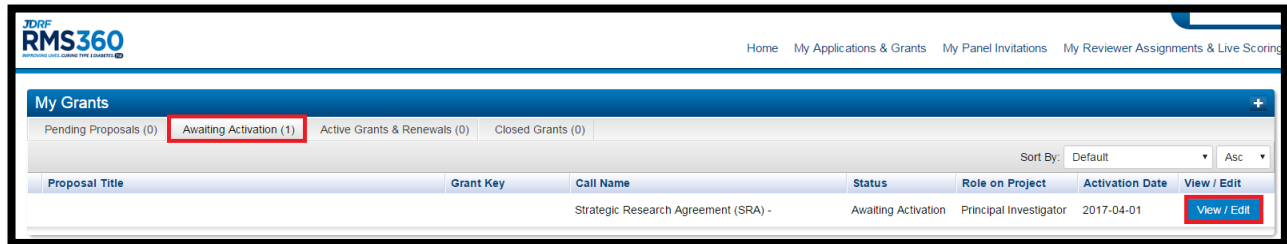
At the bottom, there is a 'Terms and Conditions' button highlighted in red.

Milestones

1. How do I add milestones to my activation?

Roles: The following steps are for the Principal Investigator (PI).

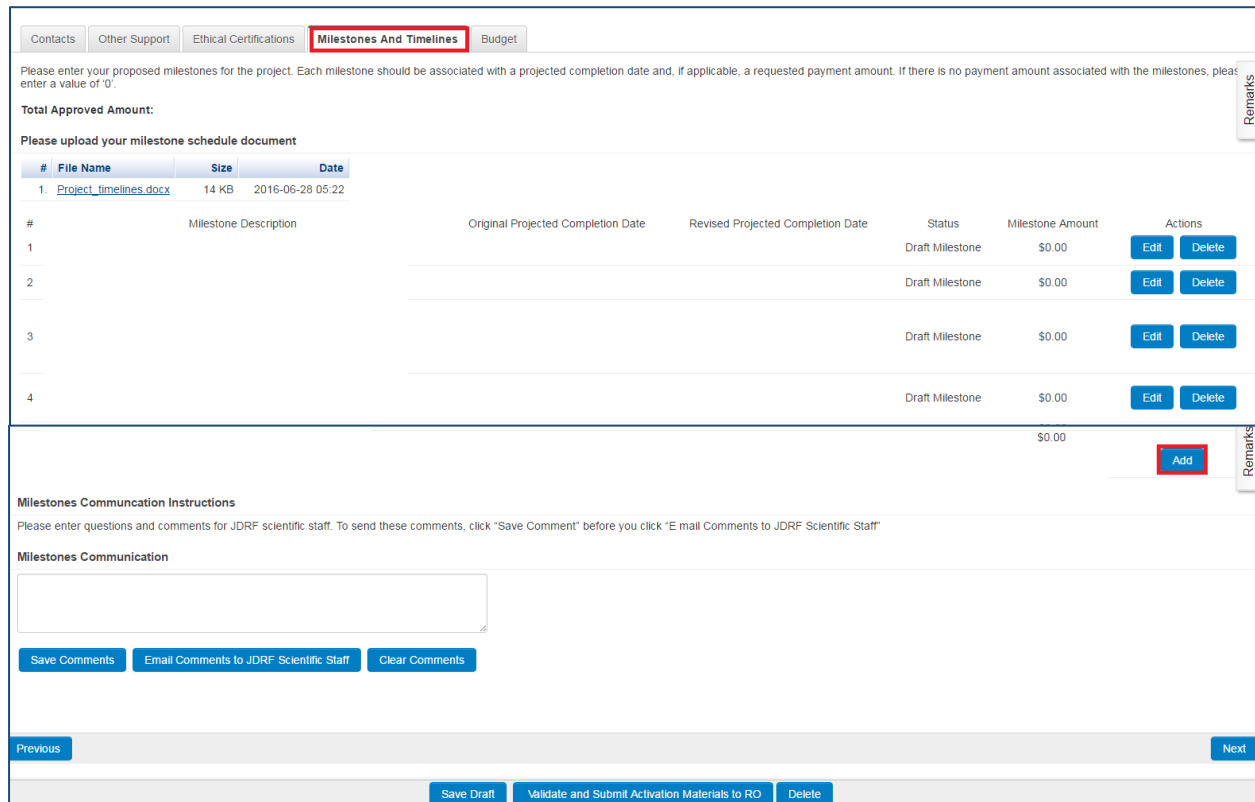
Step 1. Log into RMS360 and navigate to the 'Awaiting Activations' tab and click on the 'View/Edit' button.



The screenshot shows the 'My Grants' section of the RMS360 interface. The 'Awaiting Activation (1)' tab is selected and highlighted with a red box. Below the tabs, a table lists grants. The first row is for a 'Strategic Research Agreement (SRA) -' with a status of 'Awaiting Activation' and a role of 'Principal Investigator'. The 'View / Edit' button for this grant is highlighted with a red box.

Proposal Title	Grant Key	Call Name	Status	Role on Project	Activation Date	View / Edit
Strategic Research Agreement (SRA) -			Awaiting Activation	Principal Investigator	2017-04-01	View / Edit

Step 2. Once in the Activation, navigate to the 'Milestones And Timelines' tab and click on the 'Add' button.

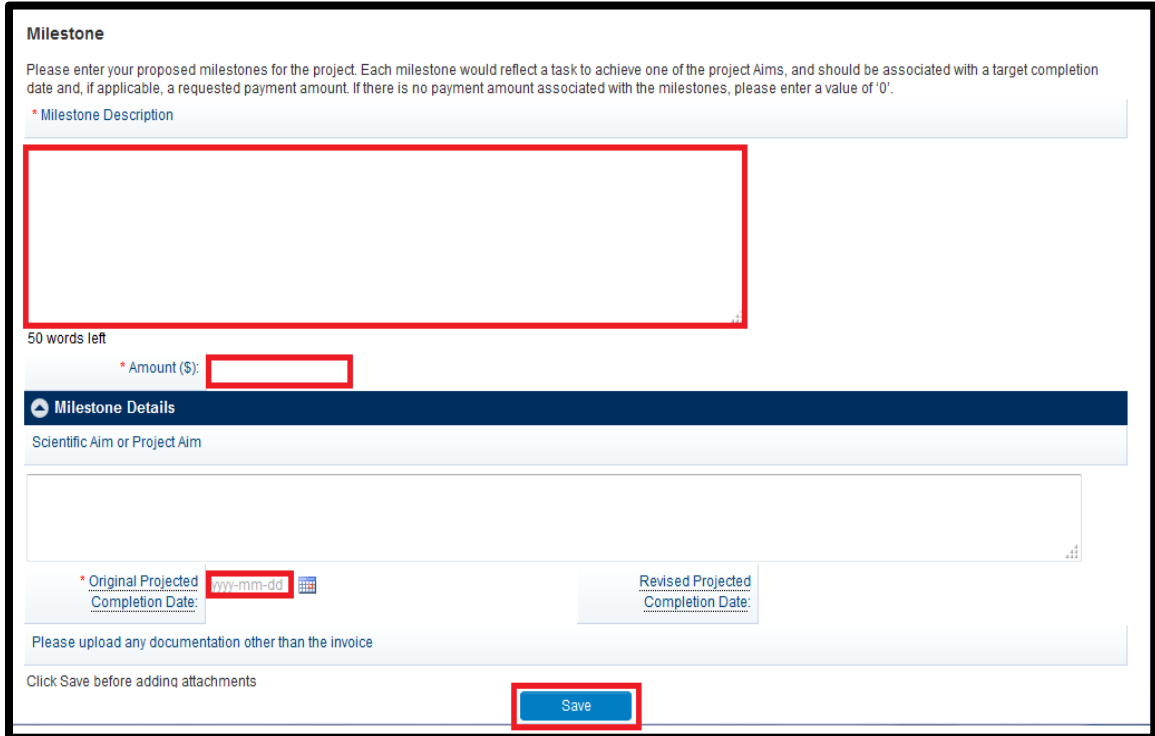


The screenshot shows the 'Milestones And Timelines' page. At the top, the 'Milestones And Timelines' tab is highlighted with a red box. Below the tabs, there is a section for uploading a milestone schedule document. A table lists the uploaded files, including 'Project_timelines.docx'. Below this, there is a table for adding milestones. The 'Add' button at the bottom right of the milestone table is highlighted with a red box.

#	File Name	Size	Date
1.	Project_timelines.docx	14 KB	2016-06-28 05:22

#	Milestone Description	Original Projected Completion Date	Revised Projected Completion Date	Status	Milestone Amount	Actions
1				Draft Milestone	\$0.00	Edit Delete
2				Draft Milestone	\$0.00	Edit Delete
3				Draft Milestone	\$0.00	Edit Delete
4				Draft Milestone	\$0.00	Edit Delete
					\$0.00	Add

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’.



Milestone

Please enter your proposed milestones for the project. Each milestone would reflect a task to achieve one of the project Aims, and should be associated with a target completion date and, if applicable, a requested payment amount. If there is no payment amount associated with the milestones, please enter a value of '0'.

* Milestone Description

50 words left

* Amount (\$):

Milestone Details

Scientific Aim or Project Aim

* Original Projected Completion Date:

Revised Projected Completion Date:

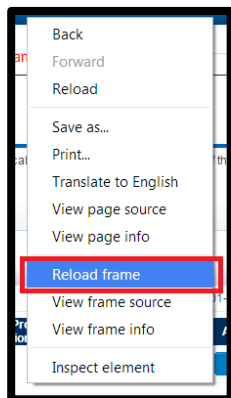
Please upload any documentation other than the invoice

Click Save before adding attachments

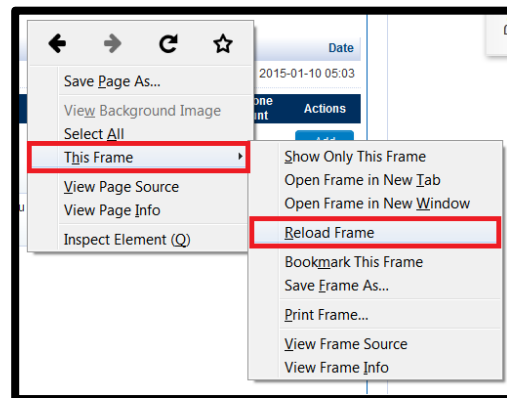
Save

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’).



Google Chrome right-click menu



Mozilla Firefox right-click menu

Step 6. Navigate back to the ‘Milestone And Timelines’ 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.

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

Please enter your proposed milestones for the project. Each milestone should be associated with a projected completion date and, if applicable, a requested payment amount. If there is no payment amount associated with the milestones, please enter a value of '0'.

Total Approved Amount:

Please upload your milestone schedule document

Multiple Files... Single File...

#	File Name	Size	Date			
#	Milestone Description	Original Projected Completion Date	Revised Projected Completion Date	Status	Milestone Amount	Actions
1	Milestone Description	2016-01-01		Draft Milestone	\$10,000.00	Edit Delete
					\$10,000.00	Add

Step 7. Continue this process until all milestones are added.

Step 8. If PI needs to communicate with the Breakthrough T1D Scientific Program Manager regarding milestones, the PI can use the “Milestones Communication” text box. Type the necessary communication to Breakthrough T1D, then click on ‘Save Comments’, then ‘Email Comments to Breakthrough T1D Scientific Staff’.

Milestones Communication Instructions

Please enter questions and comments for JDRF scientific staff. To send these comments, click “Save Comment” before you click “E mail Comments to JDRF Scientific Staff”

Milestones Communication

[Save Comments](#)
[Email Comments to JDRF Scientific Staff](#)
[Clear Comments](#)

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

Please contact the Breakthrough T1D 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”.

My Grants

Pending Proposals (6) | 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:
Call Name:
Role on Project: Principal Investigator
Grant Activation Date: 2013-05-01
Grant Year: 4
Proposal PDF:
Activation PDF:
Renewal PDF:
Summary Statement:

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

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: 201301703

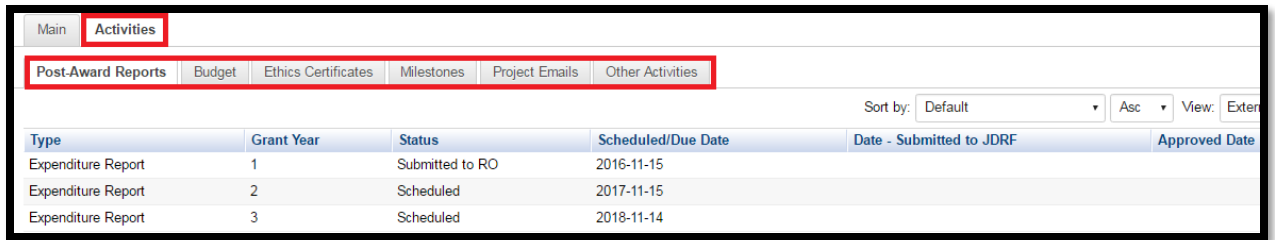
Grant Key: 3-SRA-2015-

Strategic Research Agreement (SRA)

Active Grant

[View](#)

#	Submission Number	Principal Investigator	Research Body	Proposal Title	Call Name	Mechanism	Status	View Grant
1	201301703					Strategic Research Agreement (SRA)	Active Grant	View



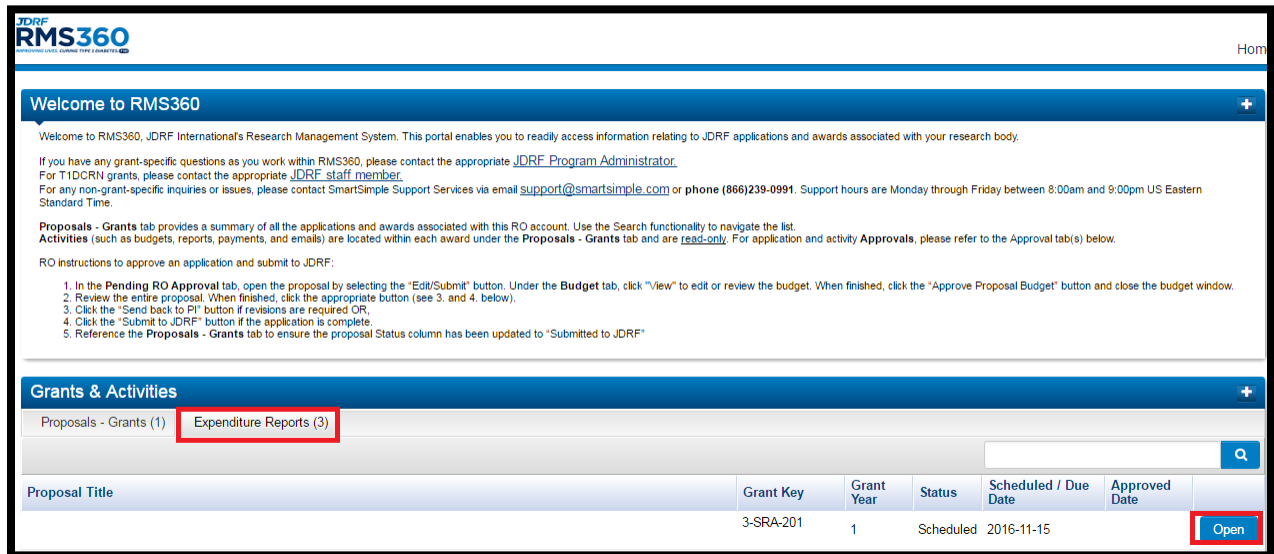
Type	Grant Year	Status	Scheduled/Due Date	Date - Submitted to JDRF	Approved Date
Expenditure Report	1	Submitted to RO	2016-11-15		
Expenditure Report	2	Scheduled	2017-11-15		
Expenditure Report	3	Scheduled	2018-11-14		

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

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.** 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.



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 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 (2) 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	
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 Breakthrough T1D.”

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

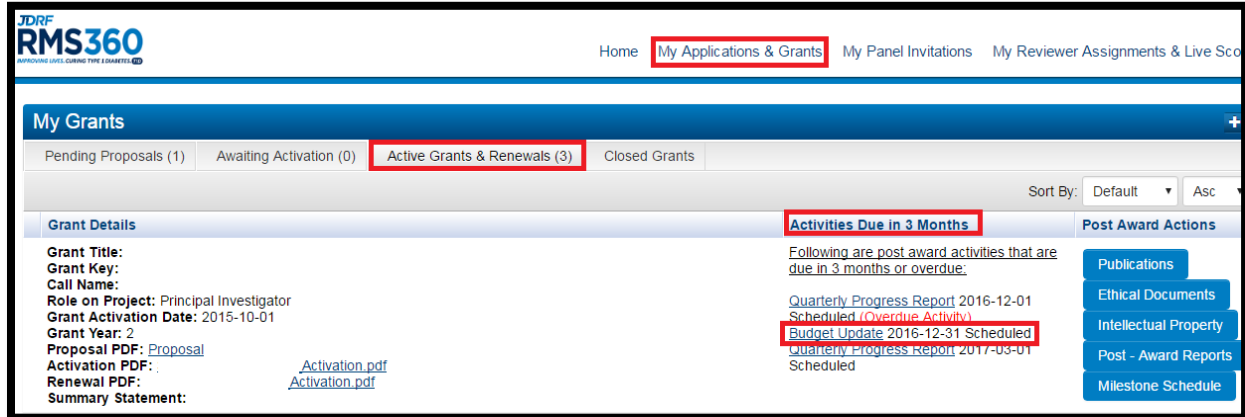
[Save](#) [Submit to JDRF](#) [Send back to FO](#)

Budget Update

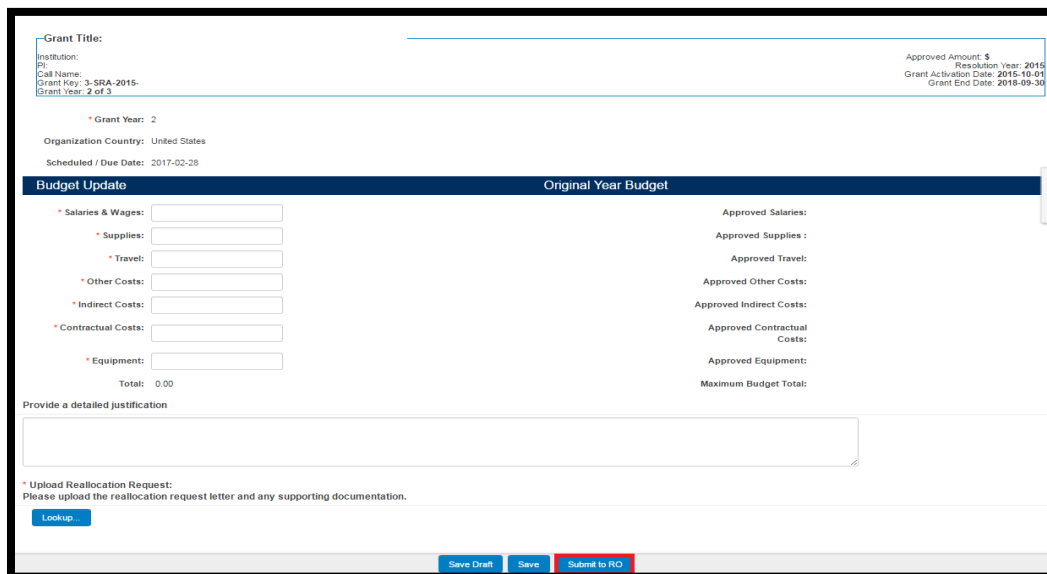
1. How do I request/submit a budget update?

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 Breakthrough T1D Administrator to request permission to complete a budget update.
- Step 2.** The Breakthrough T1D 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.

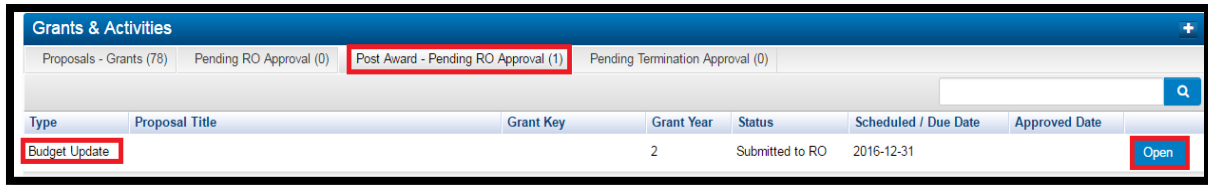


- Step 4.** The PI completes the budget update and must submit click on, 'Submit to RO' at the bottom of the screen.





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 Breakthrough T1D”.

* Grant Year: 2
 Organization Country: United States
 Scheduled / Due Date: 2016-12-31

Budget Update	Original Year Budget
* Salaries & Wages: <input type="text" value="141098"/>	Approved Salaries: \$141,098.00
* Supplies: <input type="text" value="65000"/>	Approved Supplies : \$65,000.00
* Travel: <input type="text" value="1200"/>	Approved Travel: \$1,200.00
* Other Costs: <input type="text" value="23321"/>	Approved Other Costs: \$23,320.00
* Indirect Costs: <input type="text" value="23060"/>	Approved Indirect Costs: \$23,061.00
* Contractual Costs: <input type="text" value="135080"/>	Approved Contractual Costs: \$135,080.00
* Equipment: <input type="text" value="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](#)

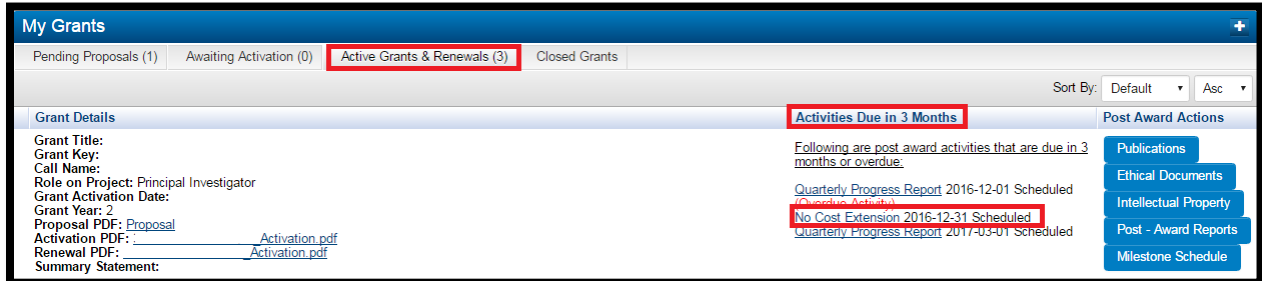
No-Cost Extensions

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 and would like to request one, contact the Breakthrough T1D 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.



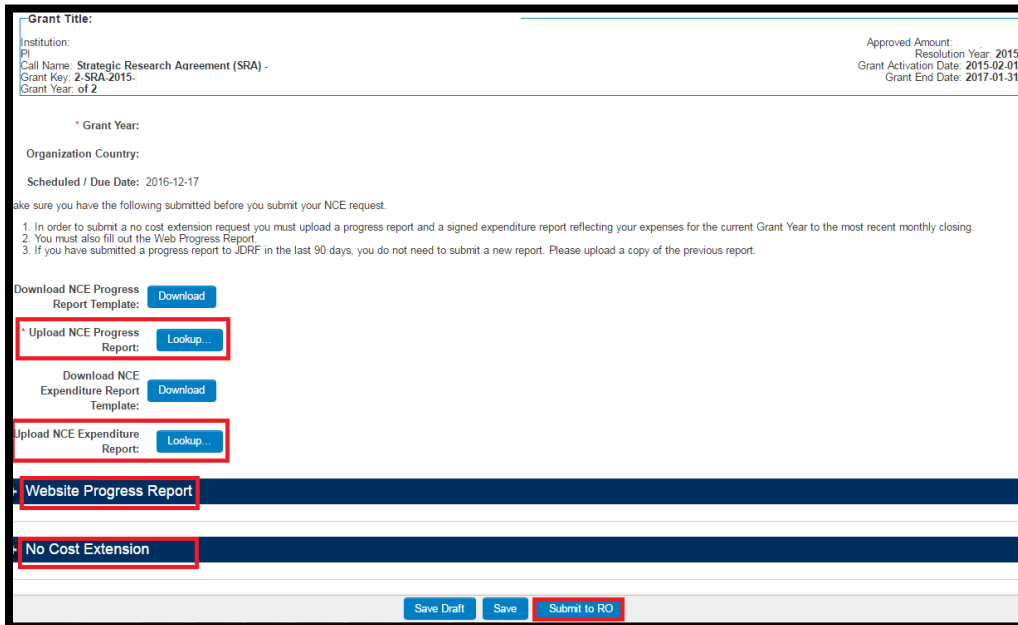
My Grants

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
<p>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:</p>	<p>Following are post award activities that are due in 3 months or overdue:</p> <p>Quarterly Progress Report 2016-12-01 Scheduled No Cost Extension 2016-12-31 Scheduled Quarterly Progress Report 2017-03-01 Scheduled</p>	<p>Publications Ethical Documents Intellectual Property Post - Award Reports Milestone Schedule</p>

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”



Grant Title: _____

Institution: _____

PI: _____

Call Name: Strategic Research Agreement (SRA) - _____

Grant Key: 2.SRA-2015- _____

Grant Year: of 2

Approved Amount: _____

Resolution Year: 2015

Grant Activation Date: 2015-02-01

Grant End Date: 2017-01-31

* Grant Year: _____

Organization Country: _____

Scheduled / Due Date: 2016-12-17

Make sure you have the following submitted before you submit your NCE request.

- In order to submit a no cost extension request you must upload a progress report and a signed expenditure report reflecting your expenses for the current Grant Year to the most recent monthly closing.
- You must also fill out the Web Progress Report.
- If you have submitted a progress report to JDRF in the last 90 days, you do not need to submit a new report. Please upload a copy of the previous report.

Download NCE Progress Report Template: [Download](#)

Upload NCE Progress Report: [Lookup...](#)

Download NCE Expenditure Report Template: [Download](#)

Upload NCE Expenditure Report: [Lookup...](#)

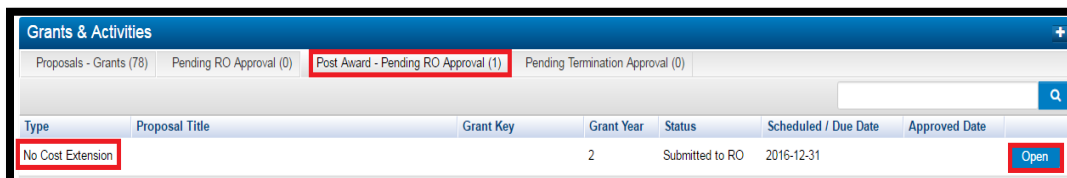
Website Progress Report

No Cost Extension

[Save Draft](#) [Save](#) [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”



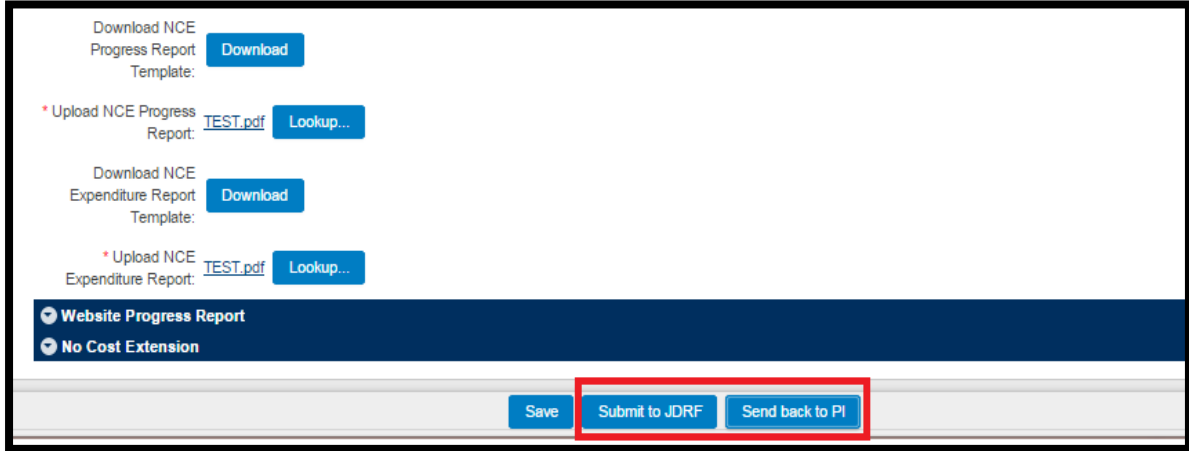
Grants & Activities

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
No Cost Extension			2	Submitted to RO	2016-12-31	

[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



The screenshot shows a web interface with the following elements:

- Download NCE Progress Report Template: [Download](#)
- * Upload NCE Progress Report: [TEST.pdf](#) [Lookup...](#)
- Download NCE Expenditure Report Template: [Download](#)
- * Upload NCE Expenditure Report: [TEST.pdf](#) [Lookup...](#)
- Website Progress Report (dropdown menu)
- No Cost Extension (dropdown menu)
- Buttons at the bottom: [Save](#), [Submit to JDRF](#), [Send back to PI](#)

Breakthrough T1D”

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 Breakthrough T1D Administrator and request a transfer as soon as the PI becomes knowledgeable of his/her transfer.

Step 2. The Breakthrough T1D 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 Breakthrough T1D Administrator to request a transition award, as soon as the PI becomes knowledgeable of his/her new faculty appointment.

Step 2. The Breakthrough T1D 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.

Termination

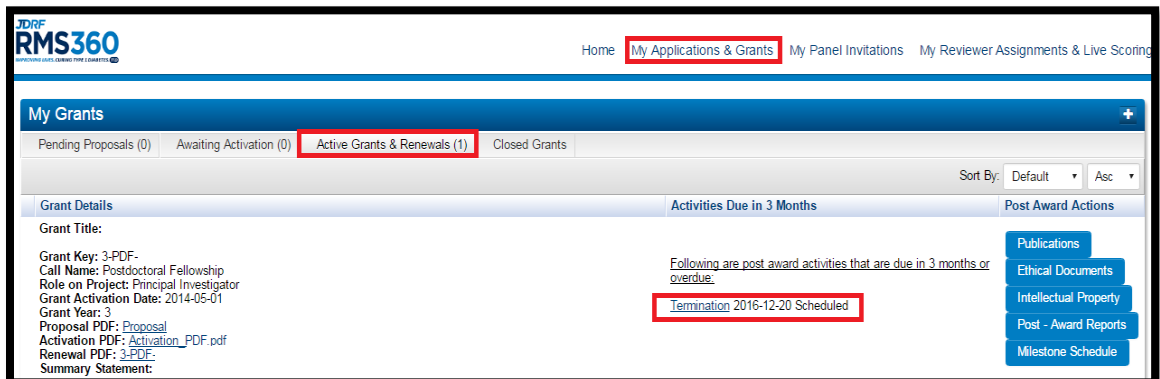
1. How do I complete the termination activity?

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 Breakthrough T1D Administrator to initiate a termination.

Step 2. The Breakthrough T1D Administrator will email the PI once the termination activity is created in RMS360.

Step 3. The PI logs in to RMS360 and selects “Termination”.



The screenshot shows the RMS360 web application interface. At the top, there is a navigation bar with links for Home, My Applications & Grants (highlighted with a red box), My Panel Invitations, and My Reviewer Assignments & Live Scoring. Below this is a 'My Grants' section with tabs for Pending Proposals (0), Awaiting Activation (0), Active Grants & Renewals (1) (highlighted with a red box), and Closed Grants. The 'Active Grants & Renewals (1)' tab is selected, showing a table with columns for Grant Details, Activities Due in 3 Months, and Post Award Actions. The 'Activities Due in 3 Months' column contains a red box around the text 'Termination 2016-12-20 Scheduled'. The 'Post Award Actions' column contains a list of links: Publications, Ethical Documents, Intellectual Property, Post - Award Reports, and Milestone Schedule. The 'Grant Details' section on the left includes information such as Grant Key, Call Name, Role on Project, Grant Activation Date, Grant Year, and various PDF links.

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:

* 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 Breakthrough T1D' 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](#)

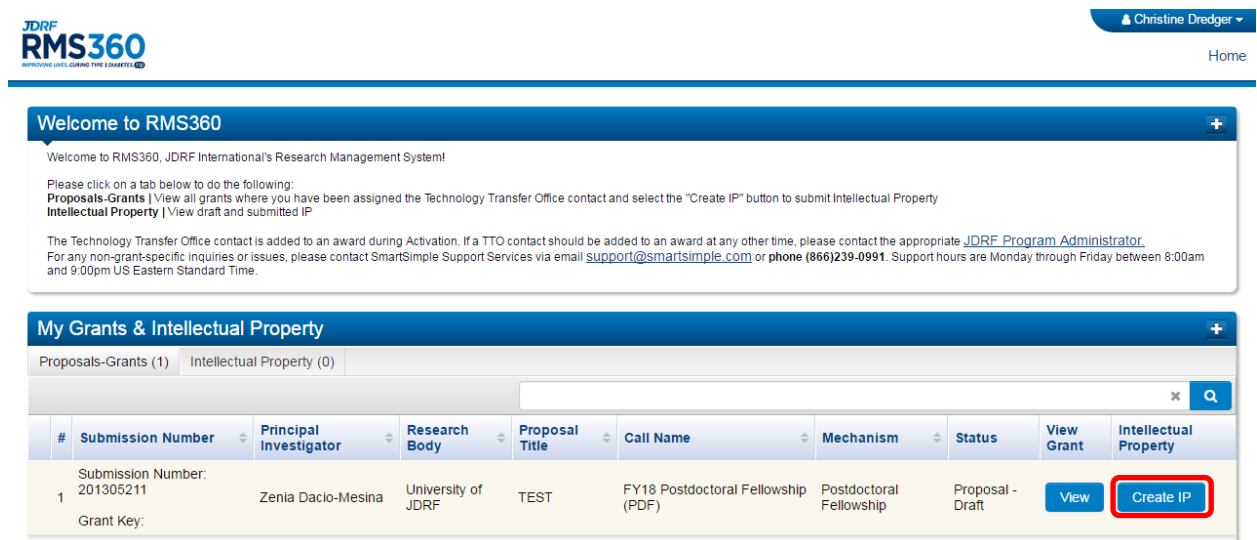
Intellectual Property

1. 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



JDRF RMS360
IMPROVING LIVES. CURING TYPE 1 DIABETES.

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 Grant Key:	Zenia Dacio-Mesina	University of JDRF	TEST	FY18 Postdoctoral Fellowship (PDF)	Postdoctoral Fellowship	Proposal - Draft	View	Create IP

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

JDRF RMS360 IMPROVING LIVES CURING TYPE 1 DIABETES 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:
500 words left

* Are any products or technologies in development?:

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.

JDRF **RMS360** IMPROVING LIVES, CHANGING THE FUTURE™ Christine Dredger ▾
Home

RMS360° - Activity

Type: Intellectual Property

Status:

Created/Submitted By: Christine Dredger

Print Preview:

* 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

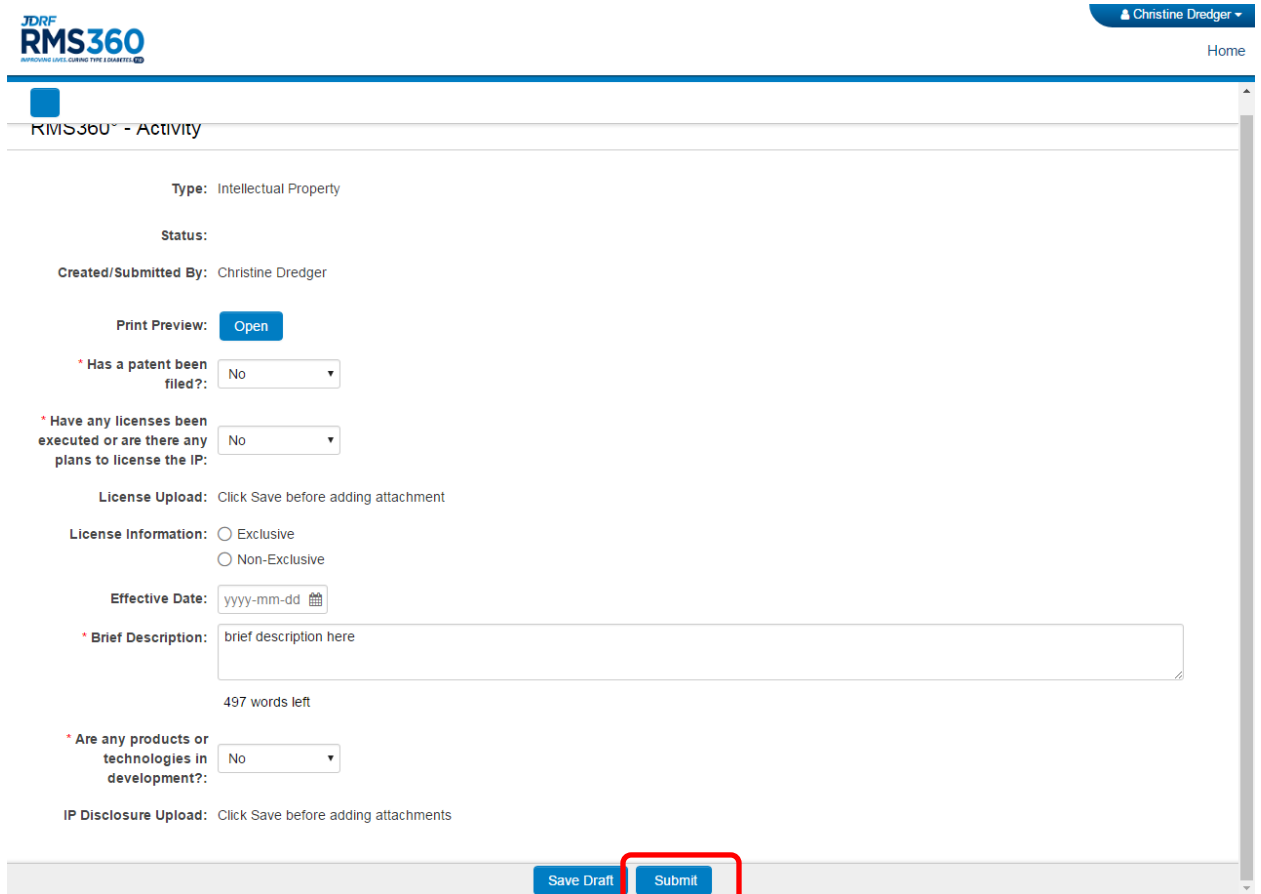
Effective Date:

* Brief Description:
500 words left

* Are any products or technologies in development?:

IP Disclosure Upload: Click Save before adding attachments

Step 4. Once the required files have been uploaded, the TTO will select the submit button to formally submit to Breakthrough T1D.



The screenshot shows the RMS360 submission interface. At the top left is the JDRF RMS360 logo, and at the top right is the user name 'Christine Dredger' with a dropdown arrow and a 'Home' link. The main content area is titled 'RMS360 - Activity' and contains the following fields and options:

- Type: Intellectual Property
- Status:
- Created/Submitted By: Christine Dredger
- Print Preview:
- * 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

At the bottom of the form, there are two buttons: 'Save Draft' and 'Submit'. The 'Submit' button is highlighted with a red rectangular box.