JROC Quick Guide

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What is RMS?

There are three system modules associated with proposal submission, tracking and award activities in the RMS system:

- 1. Proposal Development (PD): This module provides a user the ability to create and submit proposals. A copy of the PD record is automatically created in the PT module for use of tracking all activities associated with that record after submission to the agency.
- Proposal Tracking (PT): This module supports all activities (i.e. JIT, decline, award) which occur after a proposal has been submitted to a sponsoring agency. PT houses a copy of the PD record submitted to the sponsor. PT is also separately used by the Joint Research Office for Contracts (JROC) for managing contracts. If awarded, the PT module will also house pertinent information about your award, including the award budget.
- 3. Award Tracking (AT): This module is used to capture award increment statuses. An award increment is any document received at award, and includes Project Activation, Award Notices (original and revised), No Cost Extension, etc.

How to Access the RMS system

To access the system go to <u>https://rms.wustl.edu/</u>. Enter your WUSTL key user name and password.

	🐯 Washington University in St. Louis									
WUSTL Key Login 🗟										
Username										
	Forgot WUSTL Key ID?									
Password)									
	Forgot WUSTL Key Password?									
Log	wustl KEY									
This is a private network of Washington University in St. L agreement to this Privacy Statement.	ouis. Unauthorized access is prohibited. Use of this website constitutes									
V 2.1 BUILD -30913										

Once you have logged in, you will see your Home

page. The set-up of your Home page will reflect your role in the system and how you have configured your portal.

Sponsored Projects	R	MS Research	Management S	ystem			
Award Tracking	_						
Conflict of Interest	Me	ssages	Page	1 of 13 🗿 🕲	Things to do)	
SPIN	inb M	RMS Administration, COI Unexpected Route Disposition	Select 💌 🖸 13-Jan-2017 19:19:08 PM	elete New Mail		No Records/Items need your attention	
or Assistance		RMS Administration, COI Unexpected Route Disposition	13-Jan-2017 07:42:25 AM				
echnical	50	RMS Administration, COI Unexpected Route Disposition	29-Dec-2016 15:05:15 PM				
nd troubleshooting		RMS Administration, COI Unexpected Route Disposition	20-Dec-2016 15:26:32 PM				
&P Helpdesk: 314.935.5707		RMS Administration, COI Unexpected Route Disposition	20-Dec-2016 09:39:46 AM				
on-Technical ystem functionality, process and policy		RMS Administration, COI Unexpected Route Disposition	20-Dec-2016 09:39:46 AM				
roposal Development/Tracking • User Guide		RMS Administration, COI Unexpected Route Disposition	20-Dec-2016 09:39:46 AM				
Your Assigned OSRS Grant Analyst 314.747.4134		RMS Administration, COI Unexpected Route Disposition	20-Dec-2016 09:39:46 AM				
• researchgrants@wusm.wustl.edu PIN: 314.747.1654		RMS Administration, COI Unexpected Route Disposition	20-Dec-2016 09:39:46 AM				
DI: 314.747.4181 or coi@wustl.edu	2	RMS Administration, COI Unexpected Route Disposition	20-Dec-2016 09:39:46 AM				

How to Find and Open an Agreement

Using the Quick Find field on your Home page is the quickest way to search for an agreement. Enter the Last Name, Project Number, Project Title, or Sponsor Name in the field and click the magnifying glass.

Home My Profile N	ly Items Search For Items	Contacts	Calendar	Messages	Things to Do	Quick Find
Sponsored Projects	DMCR	sear	ch Ma	nade	ment Svs	stem
Section Award Tracking		Joourt		inago	mont oye	
Conflict of Interest	Things to do			Filter by A	rea v Show Completed	Items Display Options/Sorting
SPIN	No Records/Items need you	ir attention				

In "Records Found," move your cursor over the red record number to show the hover menu. Move your cursor down to "**Proposal Tracking**," then click "**Edit**." This will open the record in the Proposal Tracking module.

Records Found	Switch Recipients You Filter by Area Sorting
P18-04209 Proposal Development RMS 102 University Proposal Tracking Overview Info	Edit Not Specified Status: Approved for Submission View View
Forward	Showing 1 through 1 of 1 Items Found



In the left-side navigation, click the "**Agreements**" folder. JROC will use this folder to track all agreements under negotiation by JROC whether or not a PD Record is associated with the agreement. Unfunded agreements are entered here as well.

Depending on the Agreement Type (Subawards, Modfication, etc.) there will be a subfolder listed. Click the sub-folder to open the agreement.



Agreement Status History

The Agreement Status History section includes the current status of the agreement (e.g., pending intake, in signature process, etc.). The agreement status of "Fully Executed" is the final status.

sai P18-04620									Edit Mode
Submissions (1)	6								
	Edit Agreements/Cor	ntracts						Current Status	: Fully Execu
Sponsor	Agreement Type		Agreement From		Agreement To		Date Signed		
Personnel (1)	Modification 2	•							
H- Budget	Institution Name				Second Party Id				
Agreements (1)	Annual Confirm				00420410105				
- Modification 2	Agreement Conditions								
Assignments	<u></u>								
Communications (4)									
Approvais (0)									
Status History (2)	Agreement Status Hi	istory							
Alens/Reminders (0)	Agreement Status	<u> </u>		Agreement Status	History Date				
Shapshot	Fully Executed	•		25-Jun-2018					
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Add New PD									
Agreements (1)									
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Awards (1) Approvals (0)	You have 1000 charact	ters left.							
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Assignments

Click the "Assignments" folder to view who is the contract negotiator that is responsible for the agreement.

New/Original/P18-04620/L	Add								
🛅 Summary									
- D Sponsor		Assigned Date	Assigned	To T	Due	Instructions	Open	Remove	
Personnel (1)	000								Ma itema ta
Budget		Items	per page						No items to
Agreements (1)									
1									
- Modification 2									
Modification 2	Item H	istory							
	Item H	istory							
Modification 2 Modification 2 Assignments Communications (4) Approvals (0)	Item H	istory column header and drop it here to group	by that column						
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Fully Executed Agreement

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- Charles (1)
H. Mew/Original/P18-04620/1
- Add New PT
Add New PD
Agreements (1)
- 🧰 Awards (1)
Circle (0)
🛅 Deliverables (0)
Communications (4)
🛅 Activity Log (0)
- 🛅 Attachments (1)
Application (0)
🛅 JIT (0)
PA (0)
Dotice of Award (0)
Allocations (0)
Cost-Shares (0)
Program Income (0)
Correspondence (0)
Department-use ONLY (0)
Executed Agreement (1)
JROC-use ONLY (0)
OSRS-use ONLY (0)
Alerts/Reminders (0)

Upon full execution of a subaward or sponsored research agreement, the agreement will be uploaded to the Executed Agreements subfolder under the Attachments folder.

Click the PDF icon to view, download, or print the agreement.

Attachments			Folder	Maintenance	Add Document	Add Components		
Name⊽	Category	View Latest	History	Upload	Versions	Last Updated		Delete
FE Bucholz.Ulllinois.084204-16169.mod2	Other	uuu 🖌	۲		1	05-Jun-2018 10:13:3	4 AM	â