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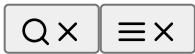
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JDRF Administrative Resources

All awards that were activated or renewed after March 1, 2014 are subject to the JDRF Terms and Conditions that were signed off on upon Activation or Renewal of your award in [RMS360](#). A **sample** of the most recent version of JDRF's Terms and Conditions can be found [here](#). The Terms and Conditions that your institution executed can be found within each individual award in the Research Officer portal in [RMS360](#). For assistance in locating your award's Terms and Conditions, please see the [RMS360 Pre and Post Award FAQs](#) or contact your [JDRF Research Administrator](#).

Please review the following administrative procedures in order to assist you with managing your grant in [RMS360](#) in the most effective manner.

For questions regarding any administrative procedures, please see the [RMS360 Pre and Post Award FAQs](#) or contact your [JDRF Research Administrator](#).

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1. RMS360

1.1 Overview

Effective March 1, 2014, all JDRF Grants are managed through **RMS360**, a web-based grants management system designed to facilitate the grantee's submission of materials from Activation through Closeout. Additional requirements outside of the JDRF Terms and Conditions will be clearly indicated in the special notes section of the Award Notification Letter, Award Activation Confirmation, and/or Award Renewal Confirmation.

All reports, including Activations, Renewals, Progress Reports, and Expenditure Reports must be submitted in **RMS360**, unless otherwise indicated. Reminder emails will be sent through **RMS360** in advance of reporting deadlines. In addition, unless otherwise instructed by your **JDRF Research Administrator**, all other grant materials (i.e. IRB/IACUC, No Cost Extension, Publications, Budget Updates, etc.) should be submitted via **RMS360**.

1.2 Login Information

Each grant managed in **RMS360** has three designated users: the Principal Investigator (PI), the Research Officer (RO), and the Financial Officer (FO). Details regarding the roles and responsibilities of the JDRF grantees can be found in **Grantee Roles and Responsibilities**.

JDRF will email an 'Award Notification' and 'Award/Activation Instructions' to the PI and RO when an award has been approved for funding. The 'Award/Activation Instructions' will contain information about logging into **RMS360** to activate your award.

In order to login, go to **RMS360**, and enter your username and password. If you

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2. Grantee Roles & Responsibilities

The roles and responsibilities of JDRF Grantees are as follows:

2.1 Principal Investigator (PI)

The Principal Investigator is designated by the Grantee Institution and is the individual responsible for the scientific or technical aspects of the grant and for day-to-day management of the project. The PI is responsible and accountable to his/her Institution/Organization for the proper conduct of the grant, including the submission of all required reports.

RMS360

The Principal Investigator has access to all reporting materials in [RMS360](#) for his/her grant(s) with the exception of the annual Expenditure Report. The PI may complete most sections of the Activation and Renewal before submitting these items to the Research Officer. In addition, the PI will complete and submit other reporting items in [RMS360](#) as needed throughout the lifecycle of the award such as Scientific Progress Reports and Ethical Renewals. For more information on the appropriate approver for each report please review [Monitoring and Reporting Procedures](#).

2.2 Financial Officer (FO)

The Financial Officer is designated by the Grantee Institution and is responsible for the proper accounting of grant funds. In this role, the individual is required to complete and certify the required annual Expenditure Reports.

RMS360

The Financial Officer is designated by the Grantee Institution and has access to Expenditure Reports for assigned grants. In this role, the FO is required to

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additional materials required according to JDRF's Administrative Procedures (i.e. Budget Updates, No Cost Extension requests, etc.). In addition, the RO is required to complete the payment details for Activations and Renewal(s), certify that all information submitted is accurate, approve the budget for each year and make the final submission to JDRF.

RMS360

The Research Officer has access to all reporting materials in **RMS360** for the RO's assigned grant(s) once they have been submitted to the RO by either the PI or the FO. For more information on the appropriate approver for each reporting type please review **Monitoring and Reporting Procedures**.

It is the responsibility of the Research Officer to ensure that all contact information for the grant's designated PI, FO and RO is correct. For instructions on how to change a user's contact information in RMS 360 please see the **RMS360 Pre and Post Award FAQs**.

2.4 Research Delegate

The Research Delegate is designated by the Principal Investigator to assist with all required PI submission.

RMS360

The Research Delegate has access to all reporting materials in **RMS360** for his/her assigned grant(s) with the exception of the annual Expenditure Report. The Research Delegate may complete most sections of the Activation and Renewal. In addition, the Research Delegate can complete other reporting items in **RMS360** as needed throughout the lifecycle of the award such as Scientific Progress Reports and Ethical Renewals. The Research Delegate cannot submit any items in RMS360. For more information on the appropriate approver for each

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of grants that he/she is assigned in [RMS360](#). The ITO will be able to add/view the IP of the grants they are assigned.

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3. Ethical Oversight

3.1. Human Subjects & Animal Welfare

All projects with human subjects and/or animal research must have up-to-date Ethical approval documentation at all times for all associated sites and must provide JDRF with copies of all approval documentation.

Deadlines

All ethical approval documents must be submitted at the time of Activation. Renewals of expired ethicals may be uploaded on an ongoing basis as the documents expire or at the time of Renewal or No Cost Extension request. All ethical documentation must be current at the time of renewal and at the end date of the grant. There cannot be any gap in ethical coverage during the lifetime of the grant. If the award is a clinical study please contact the appropriate [JDRF Research Administrator](#) as approval may not be required upon Activation. RMS360 will send the PI email reminders when an Ethical is due to expire.

Authorized Personnel

It is the responsibility of the PI to ensure that JDRF receives all required, up-to-date documentation throughout the duration of the project.

Requirements

For all projects that require IRB/EC review, the PI must provide:

- The most recent approval letter from the institutional IRB/EC.

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Ethical approval forms submitted in a language other than English require a cover letter in English on the institution's letterhead and signed by the grantee's department head verifying the content of the approval form and its expiration date.

Current IRB/EC Ethical approval forms must be submitted via RMS360 with Activation materials and IRB/EC Renewals may be submitted upon expiration, at Renewal or at the time of a No Cost Extension request. In an active grant, new or renewed Ethicals should be uploaded in RMS360 in the 'Active Grants and Renewal' tab in the PI portal by clicking the blue button that reads 'Ethicals' for the corresponding grant key. Grantees are required to provide additional verification that the Ethical approval is applicable and specific to the JDRF award in question. (A checkbox for this purpose is provided to Grantees in RMS360).

International Institutions

International institutions are required to follow the JDRF guidelines above. If an international ethical does not expire and is approved for the life of the grant, please enter the grant end date as the expiration date.

Clinicaltrials.gov

Registration should be no later than 21 days after the first subject is enrolled.

3.2 Confidentiality

Deadline

Most grant materials submitted to JDRF are for internal JDRF use only. Exceptions include the Lay Abstract submitted at the time of Application and the Web Progress Reports, submitted on an annual basis with the Annual and Final Progress Report.

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concerns or questions regarding inclusion of information in a particular report, please contact the appropriate [JDRF Scientific Staff](#) prior to final submission in [RMS360](#). For more information on where the Lay information is recorded please review [Monitoring and Reporting Procedures](#).

The Annual and Final Progress Report requires submission of a Scientific Progress Report, Website (Lay) Progress Report, and any associated Publications, Abstracts, or Presentations. In an active grant, the Annual Progress Report can be found in [RMS360](#) in the 'Active Grants and Renewal' tab in the PI portal by clicking on the blue button that reads 'Post Award Reports' for the corresponding grant key.

3.3 Conflict of Interest

Deadline

In the interest of maintaining objectivity in research, JDRF must ensure that its grant processes are free from any conflicts of interest. Please notify JDRF prior to accepting the Terms and Conditions as soon as you are made aware of the specific conflict of interest.

Authorized Personnel

Depending on the type of conflict, the PI, RO or FO should notify JDRF of the conflict.

Requirements

Organizations/Institutions that have identified conflicts of interest as they relate to JDRF funded research should report these conflicts of interest, in writing, to the appropriate [JDRF Research Administrator](#).

3.4 Scientific & Financial Misconduct

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conflict.

Requirements

Should scientific or financial misconduct occur, the Organization/Institution must notify the appropriate **JDRF Research Administrator**, in writing, of the nature of the violation, the corrective actions that will be taken in order to correct the violation, and a timeline in which those corrective actions will be executed.

3.5 US Economic Sanctions, Anti-Terrorism Laws & Anti-Money Laundering Laws

See JDRF Terms and Conditions.

3.6 Funding Provider and not Sponsor

See JDRF Terms and Conditions.

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4. Payment

4.1 Payment Method

Domestic payments are made via Electronic Fund Transfer (EFT) and International payments are made via Wire Transfer unless otherwise specified. Should a check be issued (in extenuating circumstances), checks will be made payable to an Institution, University, Company, Fund, or Equivalent Organizational Entity. Under no circumstances will JDRF make payment to an individual, whether that person is the Principal Investigator or an individual within the Grantee Institution.

All international awards are issued in USD and all payments are processed in USD. JDRF is not liable for exchange rate fluctuation. All invoices and Expenditure

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• PAYEE NAME

- Depository (Bank) Name
- Depository (Bank) Address
- Street
- City
- State
- Zip Code
- Routing/ABA #
- Account #
- Institution/organization's EIN

4.1.2 Required Payment Details for International Grantees

For international grants, the Research Officer is required to provide the following information:

- Payee Name
- Bank Name
- Bank Address
- Sort Code
- Swift/BIC Code
- Account #
- IBAN

4.1.3 Required Payment Details for All Grantees

A PDF of a letter from the Institution's bank certifying the payment details entered in **RMS360** is required for all grants. This letter must be on the bank's official letterhead and signed by a bank official. If the letter is in a language other than English, it must be accompanied by a letter (in English) from the Grantee Institution on the Grantee Institution's official letterhead and signed by an

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Payment categories and their associated award types are as follows:

4.2.1 One Payment per Year

Applicable to non-clinical grants up to \$250,000 (total yearly budget).

This includes but is not limited to the following JDRF grant mechanisms:

- Innovative Grants
- Postdoctoral Fellowships
- Advanced Postdoctoral Fellowships
- Career Development Awards
- Early-Career Patient Oriented Diabetes Research Awards
- Priority Research Grants
- High-Priority, Short-Term Bridge Grants

Payment Terms

First Year: One payment in the amount of the approved Year 1 budget made upon grant Activation following successful completion and approval of all required Activation materials.

- Renewal years: One payment in the amount of the approved yearly budget made upon successful completion and approval of the yearly Renewal, Annual Progress Report and previous year's Expenditure Report and up to date IRB/IACUC approvals if applicable.
- Final year: Two payments. First payment in the amount of the approved yearly budget less 10% of the award total made following successful completion and approval of yearly Renewal, Annual Progress Report and previous year's Expenditure Report. Final payment of 10% of the award total or the remaining balance based on Expenditures, whichever is least, upon completion and

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period. The budget and duration of funding are variable and continued funding is based on satisfactory effort and quarterly progress on milestones.

This includes but is not limited to the following JDRF grant mechanisms:

- Strategic Research Agreements

Payment Terms

Payments are made quarterly and are tied to completion and approval of a Quarterly Progress Report (initial payment made at grant Activation).

- First year: Payment made upon grant Activation following successful completion and approval of all required Activation materials and subsequently upon JDRF receipt and approval of Progress Reports.
- Renewal years: Payments made upon JDRF receipt and approval of the yearly Renewal and Quarterly/Annual Progress Reports.
- Final year: The final year will be split into five payments. Payments will be made the same as Renewal years except the final payment will be held until completion and approval of all Final Reports.
- Holding: Should any required documentation (Renewals, Expenditure Reports, , etc.) become past due, all payments will be held until those overdue items have been submitted and approved.

4.2.3 Semi-Annual Payments

Applicable to non-clinical grants with Semi-Annual Progress Reports. These grant types embody cooperative development of a research plan, Semi-Annual Reporting on milestones and interaction with JDRF scientists prior to and during the award period. The budget and duration of funding are variable and continued funding is based on satisfactory effort and progress on milestones.

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subsequently upon JDRF receipt and approval of Progress Reports.

- Renewal years: Payments made upon JDRF receipt and approval of the yearly Renewal and Semi-Annual/Annual Progress Reports.
- Final year: The final year will be split into three payments. Payments will be made the same as Renewal years except the final payment will be held until completion and approval of all Final Reports.
- Holding: Should any required documentation (Renewals, Expenditure Reports, etc.) become past due, all payments will be held until those overdue items have been submitted and approved.

4.2.4 Clinical Milestone Based Payments

Applicable to all clinical grants with milestone timelines.

This includes but is not limited to the following JDRF grant mechanisms:

- Strategic Research Agreements

Payment Terms

Payments are tied to a scientific milestone. Amounts for each milestone are determined prior to award Activation. An invoice must be submitted to the appropriate **JDRF Research Administrator** via email for each milestone achieved. Both the Scientific and JDRF Administrative personnel will review and approve submitted invoices.

Invoices must include the following:

- Name of Principal Investigator
- JDRF Grant Key
- Milestone Description

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subsequently upon JDRF receipt and approval of invoices.

- Renewal years: Payments made upon JDRF receipt and approval of invoice.
- Final year: Same as Renewal years, except final payment is held until all Final Reports are submitted and approved in RMS360.

4.2.5 Invoices per a Contract

Applicable to Contract-based grants.

This includes but is not limited to the following JDRF grant mechanisms:

- Industry-based awards (IDDP)

Payment Terms

Payment schedule and award requirements are described in the award Contract and all payments are tied to an invoice and/or achievement of a milestone as detailed in a Scientific Progress Report, if applicable.

If the first milestone in a Contract Agreement is for payment upon execution of the contract agreement, no invoice is required.

4.2.6 Other

Applicable to grants that do not fall within categories 4.2.1 – 4.2.5 and have special payment terms as designated in the funding letter in the special notes section.

For additional information on Reporting requirements, please see [Monitoring and Reporting](#).

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5. Cost Considerations

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the RO prior to submission to JDRF.

Requirements

The PI should justify the itemized budget in detail within the budget justification. This information will be reviewed by JDRF Scientific and Research Administrative personnel before the Activation and Renewal(s) are approved to ensure cost principle compliance.

See JDRF Terms and Conditions for additional information and guidelines relating to cost considerations.

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6. Administrative Requirements

6.1 Other Support

Deadline

Personnel contributing to a JDRF grant are expected to monitor their total percent effort across all funding (JDRF or other) which may not exceed 100%. Other support is entered in the application stage and revised accordingly at the time of Activation and Renewal(s).

Authorized Personnel

The PI on a JDRF grant must provide the PI's percent effort on that grant and a listing of all other support with the PI's associated percent effort.

Requirements

The PI should enter the PI's other sources of support within the "My Profile" section at the time of application in **[RMS360](#)**. This should then be updated at the

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Requirements

Any revision to the approved research plan must be approved by JDRF Scientific personnel responsible for the oversight of the award. The request must be signed by an Organizational/Institutional official and sent to the appropriate **JDRF Research Administrator**.

6.3 Unexpended Balances

Deadline

Refunds greater than \$250 must be returned to JDRF within 60 days of Expenditure Report due date.

Authorized Personnel

The FO is responsible for submitting the refund.

Requirements

Please contact the appropriate **JDRF Research Administrator** for the EFT instructions on how to submit the refund back to JDRF.

6.4 Carry Forwards (CF)

Deadline

If an unexpended balance remains at the end of a given grant year for a multi-year grant, JDRF may allow the grantee to Carry Forward the funds into the following year.

Automatic and Non-Automatic CF thresholds can be found in the JDRF Terms and Conditions.

All Carry Forward requests are made in conjunction with the submission of the annual Expenditure Report. For more information on the annual Expenditure

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If there are unexpended balances at the end of a budget year the grantee may request to Carry Forward these unexpended funds. For all CFs, the budget distribution for the requested Carry Forward amount must be entered in the CF tab of the Expenditure Report. In addition, for Non-Automatic Carry Forwards, the institution must answer the questions in the text boxes located at the bottom of the CF tab prior to submitting the Expenditure Report to JDRF.

All requested CFs must be approved by JDRF Research Administrative and Scientific personnel. Upon completion of JDRF review, the institution will receive an email either confirming or denying the CF request.

JDRF must receive all Renewal materials and the associated Annual Progress Report (via [RMS360](#)) prior to the Expenditure Report/CF request being considered for approval.

6.4.1 Carry Forwards for Postdoctoral Fellows and Advanced Postdoctoral Fellows

See JDRF Terms and Conditions for more information.

6.5 No-Cost Extension (NCE)

Deadline

Grants that are eligible to request No Cost Extensions will receive an 'End Date Reminder' via email 90 days prior to the grant end date. This email will contain instructions on requesting a NCE. An official request for a NCE must be submitted through [RMS360](#) no later than 45 days prior to the original end date of the award.

Authorized Personnel

The PI is responsible for completing the scientific portions of the NCE request and

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boxes provided.

- The PI should enter the revised end date in the text box provided.
- The RO/FO should download the Interim Expenditure Report template, complete and upload in the designated area. The Expenditure Report will need to be signed by the appropriate Institutional Official.
- The RO/FO needs to enter the projected budget for the requested NCE period in the text box provided.

The RO must submit the NCE to JDRF for Research Administrative and Scientific approval prior to the due date indicated on the end date reminder email. JDRF Scientific and Administrative personnel manage project timelines to ensure scientific progress is consistent with JDRF's mission and strategic deliverables. NCE requests are, therefore, highly scrutinized. For additional instructions on submitting a no-cost extension request, please see the [RMS360 Pre and Post Award FAQs](#).

Funds remaining at the end of the grant period are not sufficient justification to extend the project period. Submission of a NCE request does not denote that the request will be granted.

If approved, the institution will be notified of the new award end date and any additional revised Reporting requirements during the NCE period via an [RMS360](#) email notification.

See [Reallocation of Funds](#) for information regarding requests to reallocate funds in the final budget period (which includes the NCE).

6.6 Reallocation of Funds

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threshold, they must email a detailed narrative request to the appropriate **JDRF Research Administrator**.

If this request is approved by JDRF personnel, a Budget Update activity will be opened in **RMS360** for the PI to complete. The PI will be sent an email with the due date for submitting the Budget Update. Once opened, the Budget Update can be found in **RMS360** in the 'Active Grants and Renewal' tab in the PI portal. For additional instructions on submitting a Budget Update, please see the **RMS360 Pre and Post Award FAQs**.

If JDRF Administrative and Scientific personnel approve the Reallocation request, the institution will be notified and provided documentation via email confirming the revised budget.

Please see JDRF Terms and Conditions for JDRF Reallocation thresholds and guidelines.

6.7 Change in Percent Effort for Key Personnel

Deadline

As soon as the PI and/or Grantee Institution is made aware of the Percent Effort change of Key Personnel.

Authorized Personnel

The PI and RO must complete the Change in Percent Effort request.

Requirements

If the Grantee would like to change the percent effort of Key Personnel beyond the threshold, the Grantee must submit an official written request to JDRF. The request must be on institutional letterhead and signed by the PI and an Institutional Official. Requests to change Percent Effort should be submitted via

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submitted in writing to JDRF within 30 days of the start date of the LOA.

Authorized Personnel

The PI and RO must complete this LOA request.

Requirements

The LOA request must be on institutional letterhead and must include an appropriate justification for the leave of absence, the start and end dates of the LOA, a request to extend the budget period (if applicable), the signature of the PI, and the signature of an Institutional Official. This request should be emailed to the appropriate **JDRF Research Administrator**.

The PI or Grantee Institution may submit a request to extend the budget period in which the LOA occurs so as to allow for scientific progress consistent with the original research plan's timeline. A request to extend the budget period must be included in the LOA request provided to JDRF as specified above. The extension cannot exceed the period of time pertaining to the LOA. If applicable, the start date of subsequent budget period will be modified accordingly to reflect the extension. Subsequent budget periods will not be shortened as a consequence of the LOA budget period extension.

6.9 Transfers

Deadline

As soon as the PI and/or Grantee Institution is made aware that a PI will be Transferring. Any request from the Principal Investigator to transfer Grantee Institutions must be made in advance of the anticipated start date at the new Institution.

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The transfer request should be made by email to the appropriate **JDRF Research Administrator**.

Upon receipt of this request, the **JDRF Research Administrator** will open a 'Termination' activity in **RMS360** to be completed and submitted by the original Grantee Institution and will notify the PI of the due date of this request. Once opened, the 'Termination' activity will be located in **RMS360** in the 'Active Grants and Renewal' tab in the PI portal. There will be several questions that the PI and RO will be required to answer. In addition, the RO will need to enter the amount of unexpended funds and agree to relinquish all claims to any unexpended and uncommitted funds remaining in the grant as of the Institution termination date. The appropriate signing authority will need to enter their name, title and the date of execution prior to submitting the 'Termination' activity to JDRF. For additional instructions on submitting a 'Termination', please see the **RMS360 Pre and Post Award FAQs**.

The following items will be required in relation to the Transfer request:

- A Final Expenditure Report from the original Grantee Institution will be required in RMS360 within 60 days of the end date at the original Institution.
- JDRF will require a refund for any unexpended funds remaining at the original Grantee Institution within 60 days of the Final Expenditure Report due date.
- If the Transferring award is in its final year and the PI expects to request a No-Cost Extension, the original Grantee Institution will need to complete an NCE request in tandem with the termination activity between 90 – 60 days prior to the end date. Please note that all NCEs need to be approved prior to the transfer taking place.
- A Transfer Grant Application will be opened for the new Grantee Institution to complete and submit in **RMS360**.

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Authorized Personnel

The PI must notify the appropriate **JDRF Scientist and Research Administrator** of the supplement request. The PI must then complete the supplement application and submit it to the RO for final review and submission.

Requirements

The supplement request should be made by email to the appropriate **JDRF Scientist and Research Administrator**.

Upon receipt of this request, if approved by JDRF Scientific staff, the JDRF Research Administrator will open a supplement application in RMS360 to be completed and submitted by the Grantee Institution and will notify the PI of the due date of this application. Once opened, the supplement application will be located in RMS360 in the 'Pending Proposals' tab in the PI portal for the PI to complete and submit to the RO for review and submission to JDRF.

For additional information and guidelines about Supplement Applications, please click [here](#).

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7. Monitoring & Reporting

All reporting should be completed via **RMS360** unless otherwise specified by your **JDRF Research Administrator**. For instructions on submitting items in **RMS360**, please see the **RMS360 Pre and Post Award FAQs**.

7.1 Award Activation

Deadlines

The Award Notification will clearly state the Activation materials deadline as well

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Activation to JDRF. The RO is also responsible for approving the budget.

Requirements

Prior to the start of any grant, all grantees are required to submit Activation materials. The Activation requires submission of the following details including but not limited to: accurate contact information, applicable Ethical approval documentation, projected budget for the funding period, payment details, milestones if applicable and other support information. By submitting the Activation, the grantee accepts the JDRF Terms and Conditions for the grant.

The Activation in **RMS360** can be found in the 'Active Grants and Renewal' tab in the PI portal. For additional instructions on submitting an Activation, please see the **RMS360 Pre and Post Award FAQs**.

7.2 Yearly Progress Reporting and Renewal

Deadlines

For most multi-year grants, an Annual Progress Report and Renewal are due 30 days prior to the start of each new funding period.

Authorized Personnel

The PI is expected to complete the Scientific Progress Reports and submit them directly to JDRF. The PI is also expected to contribute to any pertinent sections of the Renewal(s) including the Contact Information, IRB/IACUC, Budget, and Other Support. Once completed, the PI must submit the Renewal to the RO. The Research Officer is required to complete the payment details and has the sole authority to submit the Renewal(s) to JDRF. The RO is also responsible for approving the budget.

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The Renewal in [RMS360](#) can be found in the 'Active Grants and Renewal' tab in the PI portal. All required Progress Reports can be found in [RMS360](#) in the 'Active Grants and Renewal' tab in the PI portal by clicking the blue button that reads 'Post-Award Reports'. For additional instructions on submitting a Renewal, please see the [RMS360 Pre and Post Award FAQs](#).

7.3 Final Progress Reporting

Deadlines

For all grants, a Final Scientific Progress Report is required within 75 days after the end of the grant period. Final Progress Reports are also required for all grants that have been terminated (either by JDRF or by the Grantee).

Authorized Personnel

The PI must complete and submit the Final Progress Report in [RMS360](#).

Requirements

All grantees are required to submit a Final Progress Report. The report requires submission of the Scientific Progress Report, Website Progress Report (Lay audience), and any associated Publications, Abstracts (Lay audience), or Presentations.

All required Progress Reports can be found in [RMS360](#) in the 'Active Grants and Renewal' tab in the PI portal by clicking the blue button that reads 'Post-Award Reports'.

7.4 Additional Progress Reporting

Deadline

Required reporting in addition to the Annual and Final Progress Reports will be

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Award Reports’.

7.5 Expenditure Reporting

Deadlines

The Expenditure Report is due within 75 days of the end of each budget period.

Authorized Personnel

The Institution’s designated Financial Officer has the authority to complete the Expenditure Report. This report must then be submitted to the Research Officer who has the sole authority to approve the Expenditure Report and submit it to JDRF. The PI may relate any necessary Reallocation and/or Carry Forward requests to the Financial and Research Officer; however, the PI does not have access to the Expenditure Report in [RMS360](#).

Requirements

The Expenditure Report outlines financial expenditures of JDRF funds spent for the given budget period, and must follow the JDRF approved budget for the grant budget period. A grant’s expenditures must also follow the JDRF [Cost Principles](#). JDRF does not require a copy of the general ledger as a component of the Expenditure Report; however, JDRF reserves the right to request a copy of the general ledger if deemed necessary. All Expenditure Reports can be found in the in the FO portal in the ‘Expenditure Reports’ tab in [RMS360](#).

7.6 Intellectual Property, Invention Reporting, & Royalties

Effective for all grants activated on or after March 1, 2014

Deadline

Materials associated with Intellectual Property, Invention Reporting, & Royalties for any active grants should be given to JDRF as soon as the Grantee Institution is

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Materials associated with Intellectual Property, Invention Reporting, & Royalties for any closed grants should be emailed to the appropriate [JDRF Research Administrator](#).

Administrator.

See JDRF Terms and Conditions for your updated Intellectual Property, Invention Reporting & Royalty information.

7.6 Intellectual Property, Invention Reporting, & Royalties for awards that activated prior to 7/1/2012

Invention disclosures, patent applications, patent allowances and the execution of IP Transfer Agreements (including but not limited to the licensing/sublicensing, sale, transfer or other commercial utilization of a JDRF supported invention) to use inventions protected by such patent applications relating to any invention made with the support, in whole or in part, of JDRF research or training awards, must be reported within 60 days via RMS360. The report shall include a brief description of the invention, its commercial use, a list of all inventors, and the grantee institution's plan for protecting the invention (i.e., filing of a patent application, trademark or copyright application) and any plans for commercializing the invention, including a list of any potential licensees.

Grantees are required to report invention disclosures, patent applications, patent allowances and/or the execution of IP Transfer Agreements (as stated above) related to JDRF supported inventions to JDRF for a period of three years after the expiration of the JDRF grant in question. The grantee agrees to keep JDRF informed of the status of any invention disclosure or patent application filed related to a JDRF supported invention. At JDRF's request, the grantee will provide JDRF with copies of invention disclosures, patent applications, patent allowances and any IP Transfer Agreements. Such information will be for JDRF-internal

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expiration of the JDRF grant in question.

Unless otherwise indicated or requested by the grantee institution, title to any invention will reside with the grantee institution. If a grantee institution has no established patent policy or procedure for administering inventions, JDRF reserves the right to determine the disposition of invention rights, including the right to take title to an invention or patent and develop technologies/products resulting from the JDRF-funded research in the event that the grantee institution elect not to patent and pursue these developments. In this event, it is JDRF's policy to request that the institution execute appropriate assignments in favor of JDRF (which assignments shall be prepared by JDRF at its own expense) for purposes of patenting the results of the JDRF-funded research.

In acknowledgement of JDRF's support, net royalties resulting from the commercialization of discoveries made with JDRF support will be shared with JDRF. The portion of royalties to be shared with JDRF shall be determined on a case-by-case basis in accordance with the policies of the grantee institution and will be based on the relative contribution of JDRF funding to the overall project. Net royalties shall mean gross royalties and other licensing payments less administrative, licensing, legal, and other reasonably related expenses. The grantee institution will provide to JDRF, upon request, financial information adequate to establish and document the amount of net royalties received.

No patent or patent application will be abandoned without first notifying the Research Department of JDRF and giving JDRF the opportunity to take title to or continue the patent/patent application at JDRF's own expense. The grantee institution will notify JDRF at least ninety (90) days prior to any abandonment and reporting requirements.

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Intellectual Property, Invention Reporting, & Royalties Effective for all grants activated on or after July 1, 2012

The mission of JDRF (“JDRF”) is to find a cure for diabetes and its complications through the support of research. In furtherance of this mission, JDRF provides funding to various research institutions (each a “Research Institution”) to conduct research in connection with the cure, treatment and prevention of Type 1 Diabetes and its complications. This policy on intellectual property, commercialization and royalties (the “Policy”) applies to all Research Institutions that receive funding directly or indirectly, in whole or in part, from JDRF. By accepting funding from JDRF, the Research Institution agrees that it is bound by all terms and conditions specified in this Policy.

7.6.1 Intellectual Property Rights in the Research Results

As between JDRF and the Research Institution, the Research Institution will own all right, title and interest, including to the extent applicable all patent, copyright, trademark, and other legal rights, in and to all Inventions (as defined below, whether or not patentable), products of the mind, tools, scientific discoveries, technological advances, compilations, computer software, printed materials and other works of authorship created, made, conceived or reduced to practice by the Research Institution or any of its employees, investigators, students, staff or collaborators at other institutions (collectively, “Investigators”) in the course of conducting research using funding provided by JDRF (collectively, the “Research Results”). To the extent that the Research Institution’s own policies permit individual Investigators to own any right, title or interest in any Research Results, the Research Institution shall ensure that each Investigator complies with the

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SUBLICENSES TO OTHERS, TO USE AND TO PRACTICE ALL RESEARCH RESULTS FOR NON-

commercial research and development purposes related to the diagnosis, cure, treatment and/or prevention of diabetes and its complications.

The Research Institution understands that the Research Results should be used for the greatest possible public benefit, and acknowledges the potential limiting effect that exclusive licenses could have on further research, unanticipated uses, and future commercialization efforts and markets. Accordingly, the Research Institution shall not transfer, sell, license, assign, or otherwise grant any party the right to use or practice any of the Research Results on an exclusive basis (whether for research, development, commercial or other purposes) in the absence of a separate written agreement from JDRF authorizing an exclusive grant of rights, which authorization shall not be unreasonably withheld. The Research Institution shall make any third party to whom it transfers, sells, licenses, assigns, or otherwise grants any rights in any Research Results aware of this prohibition and of the rights of JDRF hereunder.

7.6.2 Other Intellectual Property of the Research Institution

This Policy does not apply to any patents, copyrights, trademarks or other intellectual property of the Research Institution that was not developed in whole or in part under JDRF funding.

7.6.3 Invention Disclosures

The Research Institution shall disclose to JDRF within 60 days all potentially patentable inventions that are conceived or first actually reduced to practice by the Research Institution or any of its Investigators during the course of carrying out any research using funding provided directly or indirectly, in whole or in part, by JDRF (each an "Invention"). The Research Institution shall make such disclosure

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the first right to pursue patent protection for inventions. In the event that the Research Institution chooses not to pursue patent protection for any Invention in

any jurisdiction or country, or abandons or intends to abandon a patent application or an issued patent claiming any Invention in any jurisdiction or country, the Research Institution shall promptly inform JDRF of such decision and at JDRF's request the Research Institution shall assign all rights in such Invention in such jurisdiction to JDRF. JDRF may also require the Research Institution to assign to JDRF all rights in any Invention for which JDRF reasonably determines the Research Institution is not diligently pursuing patent protection; provided however that prior to any such assignment JDRF shall consult with the Research Institution regarding the potential patentability and commercial potential of such Invention, and the Research Institution shall have a reasonable opportunity to commence to diligently pursue patent protection for such Invention in lieu of assigning such Invention to JDRF.

The Research Institution shall notify JDRF of its intention to abandon in any jurisdiction or country any patent application claiming an Invention or any issued patent claiming an Invention at least ninety (90) days in advance of any deadline that would cause such application or patent to be abandoned or otherwise lapse in such jurisdiction or country, and of its intention not to pursue patent protection for any Invention in any jurisdiction or country at least ninety (90) days in advance of any statutory bar that would prevent JDRF from obtaining patent protection for such Invention in such jurisdiction.

7.6.5 Commercialization

Upon the disclosure of a new Invention, the Research Institution shall take appropriate steps to commercialize such Invention in a timely fashion, but within three years of disclosure, either itself or through one or more licensees, in the

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diligently pursued commercialization of any Invention in the field of diagnosing, curing, treating, and/or preventing diabetes and its complications within three years of Invention disclosure, then at JDRF's request the Research Institution shall meet with JDRF to discuss a commercialization plan for the invention. If the Research Institution is unable to commercialize the Invention within the timeframe determined in the commercialization plan, then at JDRF's request the Research Institution shall assign all rights in such Invention to JDRF, unless the Research Institution can show reasonable cause as to why it should retain title to such Invention.

7.6.6 Assignment of Patents to the JDRF; Commercialization by the JDRF

In the event of an assignment to JDRF of rights in any Invention as provided in this Policy, the Research Institution shall cooperate with JDRF (at JDRF's expense) and shall execute or cause to be executed such documents and take or cause to be taken such other actions as reasonably may be requested by JDRF in order to effectuate such assignment. After the effective date of any such assignment, as between the Research Institution and JDRF, JDRF shall be solely responsible for all costs associated with filing, prosecuting and maintaining such patent.

In the event that JDRF commercializes a product the making, use, sale or import of which would have infringed a valid claim of any such patent absent the assignment to JDRF, JDRF shall negotiate in good faith with the Research Institution a reasonable royalty rate that will be payable to the Research Institution based on sales of such product. In addition, in the event that JDRF's making, use, sale or import of any product would infringe a valid claim of any patent claiming an Invention that is owned by the Research Institution and that is not assigned to JDRF, then the Research Institution shall grant to JDRF an irrevocable, non-exclusive, worldwide, fully paid-up, royalty-free, perpetual license, with the right

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7.6.7 Royalties/Reimbursement of Patent Costs

In acknowledgement of JDRF's provision of funding, the Research Institution shall pay to JDRF a royalty in the amount of ten percent (10%) of Net Income, up to an aggregate amount equal to five (5) times the total funding provided by JDRF to the Research Institution in connection with the grant under which the applicable Research Results were developed. For these purposes, "Net Income" shall mean gross income received by the Research Institution from the licensing, sale, transfer or other commercial utilization of any Research Results, less payments that the Research Institution makes to any applicable inventors in accordance with the Research Institution's policies and less direct, unreimbursed out-of-pocket expenses paid by the Research Institution to third parties for patent or licensing any Research Results. The Research Institution shall make all such payments to JDRF within ninety (90) days after the end of each calendar quarter in which such Net Income was received by the Research Institution. The Research Institution shall provide to JDRF, upon request, financial information adequate to establish and document the amount of Net Income. JDRF also shall have the right to audit the Research Institution's books and records annually in order to verify the Net Income. The Research Institution's obligation to pay royalties to JDRF shall survive after funding has terminated.

In the event that JDRF has funded the patent costs of any Invention that is not assigned to JDRF and that is later licensed, sold, or otherwise transferred by the Research Institution to a third party for commercialization, the Research Institution shall use commercially reasonable efforts to require such third party, as a condition of such license, sale or other transfer, to reimburse JDRF for all prior funding of such patent costs

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promptly report to JDRF any decision to abandon or not pursue patent protection on any Invention, With each such report, the Research Institution shall provide JDRF with copies of such patent applications or issued patents, copies of such copyright or trademark applications, and copies of any such agreements with a third party. JDRF shall maintain these documents in confidence as provided in this Policy.

In addition, the Research Institution shall submit annual reports to JDRF describing the status of JDRF-funded research, the Research Results (including a description of any intellectual property rights other than Inventions that have been developed), the Research Institution's efforts to seek patent protection for, develop and commercialize Inventions and other Research Results, and, if applicable, setting forth the Net Income for such year. Such reports shall include the status of such development, the names of current or potential licensees, the relevant terms of any licenses that are in negotiation or have been executed granting any third party the right to use or practice any Inventions or other Research Results, and the receipt of any royalties and other consideration under such licenses.

Grantees are required to report invention disclosures, patent applications, patent allowances and/or the execution of IP Transfer Agreements (as stated above) related to JDRF supported inventions to JDRF for a period of three (3) years after the expiration of JDRF grant in question. The grantee agrees to keep JDRF informed of the status of any Invention disclosure or patent application filed related to a JDRF supported invention. At JDRF's request, the grantee will provide JDRF with copies of invention disclosures, patent applications, patent allowances and any IP Transfer Agreements. Such information will be for JDRF-internal purposes only and will be considered confidential.

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Any such disclosure by JDRF shall be made subject to appropriate confidentiality restrictions.

7.6.10 Cooperation

As reasonably requested by JDRF, the Research Institution shall from time to time consult with JDRF with respect to matters relating to JDRF-funded research, including matters relating to the patenting, development and commercialization of Inventions and other Research Results. For example, if so requested by JDRF, the Research Institution shall discuss with JDRF the ongoing progress of JDRF-funded research, critically assess the results of such research, identify and address any weaknesses or delays in research or commercialization, and determine when and whether particular research or commercialization targets are achieved.

In making decisions whether to continue ongoing grants or whether to award additional grants to a researcher or his/her institution, JDRF will consider whether the institution has honored the above policy.

Grantees are required to indicate in their renewal progress reports and close-out final progress reports if any inventions were made during the funding period.

7.6.11 Conformance with Federal Law

Notwithstanding the foregoing provisions, nothing in this Policy is intended to, or should be construed to, conflict with Federal law, including any Bayh-Dole or NIH obligations that may arise with respect to Inventions resulting from research funded by both JDRF and federal funds. Federal law shall govern in the event of any inconsistency with this Policy.

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Requirements

Publications can be found in the 'Active Grants and Renewal' tab in the PI portal by clicking the blue button that reads 'Publications'.

7.8 Public Access Policy

Deadline

It is a condition of JDRF funding that the final peer-reviewed manuscripts be made available in the **PubMed Central** online archive immediately upon acceptance of journal publication.

Authorized Personnel

The PI is responsible for uploading final peer-reviewed manuscripts.

Requirements

- Authors are to deposit an electronic copy of their final peer-reviewed manuscripts in **PubMed Central** immediately upon acceptance for journal publication.
- The manuscript is to be made publicly available in **PubMed Central** no later than 12 months after the official date of journal publication.
- An author must acknowledge JDRF support in every article arising from such funding. The acknowledgement statement must include the applicable JDRF grant number. This will enable JDRF to link the published outputs of research to the support it has provided.

7.9 Public Announcements

Deadline

Prior to any public announcement.

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See JDRF Terms and Conditions.

7.11 Auditing

See JDRF Terms and Conditions.

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8. Termination and Enforcement Actions

8.1 Suspension and Administrative Probation

Deadline

The Grantee Institution must respond to JDRF within 15 days of the probation/corrective action notification.

Authorized Personnel

The Grantee Institution must designate the appropriate personnel to respond dependent on the type of probation/corrective action being taken.

Requirements

The Grantee Institution must send a rebuttal letter to the JDRF Scientific and Administrative personnel, at which time JDRF will make a final decision on the suitable course of action.

8.2 Terminations

8.2.1 JDRF-Initiated Award Termination

Deadline

Programmatic termination may be initiated by JDRF if scientific milestones are not

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JDRF will notify the Grantee in writing of the programmatic termination. Final

Progress and Expenditure Reports will need to be submitted in **RMS360** no later than 60 days after the Termination date.

8.2.2 Grantee-Initiated Award Termination

Deadline

Awards may also be Terminated by the Grantee, in whole or in part. The Grantee Institution must notify JDRF as soon as they have decided that they wish to Terminate their award.

Authorized Personnel

The PI must submit the Termination to the RO for final review and approval.

Requirements

The Grantee Institution must notify the **JDRF Research Administrator** by email with the request for Termination and the reason for this request. Upon receipt of this information, the JDRF Research Administrator will open a 'Termination' activity in **RMS360** to be completed and submitted by the Grantee Institution and will notify the PI and RO of the due date for this submission. Once opened, the 'Termination' activity will be located in **RMS360** in the 'Active Grants and Renewal' tab in the PI portal. The PI must submit the termination to the RO for final review and approval. Final Progress and Expenditure Reports need to be submitted in **RMS360** no later than 60 days after the Termination date.

If a Grantee elects to Terminate a portion of their award, JDRF may determine that the remainder of the grant no longer meets JDRF research mandates and may elect to Terminate the remainder of the entire award.

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Authorized Personnel

JDRF Scientific and Administrative personnel.

Requirements

JDRF Scientific and Administrative personnel will notify the Grantee Institution, in writing, of the nature of the special conditions, why they are being imposed, what corrective action the Grantee Institution can take to correct the problem(s) and the timeline for complying.

8.4 Recovery of Funds

Deadline

Debts to JDRF may result from recovery of funds, unobligated balances, cost disallowances, or other situations. JDRF will notify the Grantee Institution as soon as JDRF is aware of such debt.

Authorized Personnel

JDRF Scientific and Administrative Staff.

Requirements

JDRF Scientific and Administrative personnel will notify the Grantee Institution, in writing, of the outstanding debt owed, and will include a payment schedule and timeline for repayment for the Grantee Institution. Unpaid debts owed to JDRF may result in administrative probation, including, but not limited to, withholding award payments for any additional or future JDRF grant the Grantee or the Grantee Institution may hold.

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9. Grant Appeals Procedure/Rebuttal

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Administrative personnel, at which time JDRF will make a final decision on the suitable course of action.

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