New UTRMS Modules Live June 27th
Launch Summary for Faculty, Research Staff & Administrators

Log in with your UT EID/password & Duo authentication

**UTRMS-COI**

- Updated tool for disclosure of potential conflicts of interest/conflicts of commitment for researchers and faculty.
- This tool replaces the eProtocol FID system for financial interest disclosures, and replaces the Outside Activity Portal for submission of Pre-Approval Requests, merging both tools into a single portal.
- The portal integrates annual disclosure information with related research certifications (both sponsored projects and human subjects research protocols) to ensure transparency and track compliance.

Who across campus will use it, in addition to central staff?

- All faculty
- All Principal Investigators (PIs)
- All staff who are eligible to serve as PI
- All other users who are identified as Covered Individuals (CIs) on research projects (regardless of project role)

How are processes changing?

- **UTRMS-COI** implements recently updated HOP 7-2011 which requires annual disclosure by all faculty and PI-eligible staff
- Existing disclosure information will not migrate; all ongoing interests/disclosures will need to be re-entered into **UTRMS-COI**
- The Financial Interest Disclosure Form (FID) is replaced by the Disclosure Profile
- CIs will be prompted to complete a separate FCOI certification for each research project to verify accuracy of existing disclosures or update as needed
- Faculty will submit Pre-Approval Requests (PAR) in **UTRMS-COI** instead of the Outside Activity Portal
- FCOI Training will eventually be required outside of the disclosure system (not anticipated at Go-Live)

Key Dates

**After June 27th:**
- Submission to **UTRMS-COI** required at time of whichever of below list comes first:
  - Award acceptance
  - Addition to IRB protocol
  - Annual disclosure deadline
- Faculty Pre-Approval Requests for outside activities submitted in **UTRMS-COI**
- Access to eProtocol FID will be read-only
- Faculty and PI-eligible staff who are not currently disclosing in eProtocol will be prompted to submit

**UTRMS-Grants**

- As of June 27th 2022, all sponsored projects must be submitted and managed through this portal.
- Comprehensive tool for proposal submission & award management (including: proposal creation, budget development, electronic submission to Grants.gov, award setup, modification entry, budget reconciliation, and deliverable tracking). This tool replaces and expands upon the Research Management System (RMS).
- Benefits include increased transparency, reporting, and opportunities for long-term improvement. Location of financial details of awards (vs. negotiations, which can be found in previously-launched UTRMS-Agreements).

Who across campus will use it, in addition to central staff?

- Departmental research administrators (DRAs) or other staff who provide support to principal investigators (PIs) or other researchers
- PIs or other researchers without dedicated administrative support (though all PIs will reference)
- Other support staff across campus who may need access to records

How are processes changing?

- All “in-flight” (submitted, not yet awarded) proposals and active (with active financial account) awards will migrate and be available as shell records in **UTRMS-Grants**
- The Proposal Review Form (PRF) is replaced by the Funding Proposal (FP) SmartForm/submission
- Proposal Budgets (BU) must be created within the system, not uploaded as separate attachments/spreadsheets. This benefits you by:
  - Streamlining proposal review & award set-up, for faster turnaround
  - Improving data/reporting accuracy
- In-system SF424 functionality replaces Cayuse424 for system-to-system (S2S) submissions to Grants.gov (does not currently include submissions to Research.gov [NSF], but is anticipated to in a future update)

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**June 22nd at noon (RMS cutover deadline):** For proposals with submission deadlines before June 27th, all PRF materials must be submitted in RMS

**June 22nd at noon through June 26th (blackout period):** RMS and **UTRMS** (all modules) will both be unavailable during data migration period; proposal submission to sponsors will continue

**June 27th (go-live) and beyond:**
- All proposals submitted via **UTRMS-Grants**
- Access to RMS will be read-only

**IMPORTANT NOTE:** A proposal deadline of 3 PM CT daily will be implemented for June 27–July 5, to allow for additional processing time as we transition to the new UTRMS-Grants system. For this reason, PIs with proposals due within that time range are strongly encouraged to submit early, prior to the deadline date.

To stay updated & find resources related to Go-Live, bookmark: [research.utexas.edu/eraproject/grants-coi-launch](research.utexas.edu/eraproject/grants-coi-launch)
Training Opportunities

We invite you to choose a date and time that works for your schedule to try out our new systems and learn more.

**Not sure where to begin? Start by attending one of the Overview sessions (marked with a star •).**

<table>
<thead>
<tr>
<th>Training Options</th>
<th>Details</th>
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<tbody>
<tr>
<td><strong>UTRMS-Overview for Disclosers</strong></td>
<td>A 45-minute webinar for UT Austin researchers (and interested support staff) covering new policies and procedures for reporting conflicts of interest.</td>
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<tr>
<td><strong>UTRMS-Grants Overview</strong></td>
<td>A 90-minute session for UT Austin departmental research administrators (and researchers without dedicated support) introducing the new <strong>UTRMS-Grants</strong> module. The webinar will preview the new system, answer questions about what to expect, and show you where to find resources and help. Attend this session to prepare for advanced sessions including Funding Proposals &amp; Budget, Advanced Budget, SF424, Awards, and Advanced Awards.</td>
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<tr>
<td><strong>UTRMS-Grants – Funding Proposals &amp; Budgets</strong></td>
<td>90 mins. Covers creating funding proposals and basic budget entry. Attending the Overview webinar is recommended prior to this training session.</td>
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<tr>
<td><strong>UTRMS-Grants – Advanced Budgets</strong></td>
<td>90 mins. Focuses on more complex budget activities. Attending both the Overview webinar and Funding Proposals &amp; Budget training is recommended prior to this training session.</td>
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<tr>
<td><strong>UTRMS-Grants – SF424</strong></td>
<td>90 mins. Covers the creation, review, and submittal of the Standard Form 424 package for system-to-system submission of grants through <strong>UTRMS</strong>. Attending both the Overview webinar and Funding Proposals &amp; Budget training is recommended prior to this training session.</td>
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<tr>
<td><strong>UTRMS-Grants – Awards</strong></td>
<td>90 mins. Covers the creation and management of Awards in <strong>UTRMS</strong>. Attending the Overview webinar is recommended prior to this training session; Funding Proposals &amp; Budget may also be helpful.</td>
</tr>
<tr>
<td><strong>UTRMS-Grants – Advanced Awards</strong></td>
<td>90 mins. Focuses on more complex award activities in <strong>UTRMS</strong>. Attending both the Overview webinar and Awards training is recommended prior to this training session.</td>
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**Training sessions will be added to the calendar as need dictates; recordings of each type of training will be posted as soon as available, for on-demand viewing.**

Support Options

- **Live Chat**: On-demand support from 7 AM to 7 PM Monday through Friday during the first two weeks after Go-Live (and 9 AM to 4 PM thereafter). Click on the **UTRMS Chat** button on the right of our project website’s **Get Help** page to begin.
- **Virtual Office Hours**: Drop-in assistance and information from the project team and central staff at 11 AM Wednesdays over Zoom. Look for a permanent link to be shared (via project website and email lists) shortly before Go-Live.
- **Support Request Ticket**: Ticketing for other technical needs. Coming soon to project website and in-system **Get Help** button.
- **Concierge Appointment**: Contact the OSP **Concierge Services** to set up an in-person or virtual appointment.

**RECORDS ACCESS**: Are you in a role for which **departmental access to UTRMS-Grants records** is necessary (e.g. DRA, Department Chair, other leadership role)?

- **By June 10th**: reply to the **DRA Access Qualification Survey**, including the Unit Code(s) for which you need access; responses provided here will be captured and applied for Go-Live.
- **After June 10th and onward**: request access via OSP **ERA Help Ticket**.

Self Help Toolkit

**On-Screen Assistance in UTRMS**:
- **Help Text** (see circled question marks throughout)
- **Walkthroughs** (see top center “Get Help” button)
- **Help Videos** (see small blue “(?) Help” in top right of various record workspaces)
- **Help Center** (see final sub-tab within Grants module tab)

**Resources & FAQs page** of project website:
- Organized by role (Researcher, Support Staff, Central Office Staff):
  - **Quick Guides**
  - **Detailed Walkthroughs**
  - **FAQs & Glossary**