

New UTRMS Modules Live June 27th

Launch Summary for Faculty, Research Staff & Administrators



UTRMS-COI



UTRMS-Grants

Log in with your UT
EID/password &
Duo authentication

coi.research.utexas.edu

grants.research.utexas.edu

What is it & why is it important?

- 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.

- 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?

- 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)

- 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?

- 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)

- 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)

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

- 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 through June 26th (blackout period):** RMS will be unavailable starting at noon 6/22, but proposal submission to sponsors will continue; **current UTRMS will be unavailable starting at 5 PM 6/22**
- June 27th (go-live) and beyond:**
 - All proposals submitted via *UTRMS-Grants*
 - Access to RMS will be read-only

To stay updated & find resources related to Go-Live, bookmark: research.utexas.edu/eraproject/grants-coi-launch

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.



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 ⭐).

Click below links to register†, or view all in calendar at: research.utexas.edu/eraproject/events/

⭐ UTRMS-COI Overview for Disclosers

A 45-minute webinar for UT Austin researchers (and interested support staff) covering new policies and procedures for reporting conflicts of interest.

- [Jun. 21 \(Tue.\) at 11 AM](#) (Dell Medical School focus)
- [Jun. 22 \(Wed.\) at 11 AM](#) (Cockrell School of Engineering focus)
- [Jun. 29 \(Wed.\) at 11 AM](#)
- [Jul. 6 \(Wed.\) at 11:30 AM](#)
- [Jul. 20 \(Wed.\) at 11:30 AM](#)

⭐ UTRMS-Grants Overview

A 90-minute session for UT Austin departmental research administrators (and researchers without dedicated support) introducing the new *UTRMS-Grants* 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 & Budget, Advanced Budget, SF424, Awards, and Advanced Awards.

- [Jun. 8 \(Wed.\) at 11:30 AM](#) (College of Natural Sciences focus)
- [Jun. 9 \(Thu.\) at 11 AM](#) (College of Education focus)
- [Jun. 15 \(Wed.\) at 11 AM](#) (College of Liberal Arts focus)
- [Jun. 21 \(Tue.\) at 12 PM](#) (Dell Medical School focus)
- [Jun. 22 \(Wed.\) at 12 PM](#) (Cockrell School of Engineering focus)
- [Jun. 27 \(Mon.\) at 11 AM](#)
- [Jul. 5 \(Tue.\) at 11 AM](#)
- [Jul. 18 \(Mon.\) at 11 AM](#)

UTRMS-Grants – Funding Proposals & Budgets

90 mins. Covers creating funding proposals and basic budget entry. Attending the Overview webinar is recommended prior to this training session.

- [Jun. 13 \(Mon.\) at 10 AM](#)
- [Jun. 20 \(Mon.\) at 10:30 AM](#)
- [Jun. 28 \(Tue.\) at 10:30 AM](#)
- [Jul. 12 \(Tue.\) at 10:30 AM](#)

UTRMS-Grants – Advanced Budgets

90 mins. Focuses on more complex budget activities. Attending both the Overview webinar and Funding Proposals & Budget training is recommended prior to this training session.

- [Jun. 13 \(Mon.\) at 12 PM](#)
- [Jun. 20 \(Mon.\) at 12:30 PM](#)
- [Jun. 28 \(Tue.\) at 12:30 PM](#)
- [Jul. 12 \(Tue.\) at 12:30 PM](#)

UTRMS-Grants – SF424

90 mins. Covers the creation, review, and submittal of the Standard Form 424 package for system-to-system submission of grants through *UTRMS*. Attending both the Overview webinar and Funding Proposals & Budget training is recommended prior to this training session.

- [Jun. 16 \(Thu.\) at 11 AM](#)
- [Jun. 29 \(Wed.\) at 12 PM](#)
- [Jul. 13 \(Wed.\) at 11 AM](#)

UTRMS-Grants – Awards

90 mins. Covers the creation and management of Awards in *UTRMS*. Attending the Overview webinar is recommended prior to this training session; Funding Proposals & Budget may also be helpful.

- [Jun. 17 \(Fri.\) at 10:30 AM](#)
- [Jun. 30 \(Thu.\) at 10:30 AM](#)
- [Jul. 14 \(Thu.\) at 10:30 AM](#)

UTRMS-Grants – Advanced Awards

90 mins. Focuses on more complex award activities in *UTRMS*. Attending both the Overview webinar and Awards training is recommended prior to this training session.

- [Jun. 17 \(Fri.\) at 12:30 PM](#)
- [Jun. 30 \(Thu.\) at 12:30 PM](#)
- [Jul. 14 \(Thu.\) at 12:30 PM](#)

† **NOTE:** If you encounter **difficulty registering**, please try using your **EID** email; the format for this email is your personal **EID@eid.utexas.edu**. (This email is used as the default address of all UT Zoom accounts.) If you are still having difficulty registering for a course, please **contact the Project Team**.

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.

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



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)?

Request access via OSP [ERA Help Ticket](#).