



RMS Update: Managing Proposals in April & May 2018

It is expected that WashU will go-live on April 23, 2018 with the Research Management System's (RMS) Proposal Development (PD) & Proposal Tracking (PT) modules. Below is important process information and dates for managing proposals that are due out in April and May.

Please disseminate this important information to all applicable faculty and staff.

Moving from RMS to PDS

For go-live, the following PDS docs/data will be automatically converted into RMS:

- Pending documents
 - Note: Pending is a PDS status that indicates OSRS has completed their review and signature of a grant application and it is ready to be submitted to the funding agency.
- Awarded documents which have an active budget/project period

The converted PDS data will populate new records in the PT module and will be assigned an RMS proposal number (P18-#####). These PT records will then be finalized by OSRS in RMS/PT as awarded, agency rejected, etc.

Managing Proposals Due to Agency in Late April / Early May

The Office of Sponsored Research Service's (OSRS) goal is to make sure all applications that are initiated in PDS will be in Pending status by COB (close of business) 4/19/18. The Transition timeline is as follows:

4/12/18 • Thursday COB ► Department Administrators (DAs) Submit all PDS docs to OSRS

4/16/18 • Monday COB ► OSRS to approve all PDS docs

4/17/18 • Tuesday COB ► DAs Submit all applications to OSRS

4/19/18 • Thursday COB ► OSRS to approve/sign/submit all applications

4/20/18 • Friday 4:00 p.m. ► PDS changes to inquiry-only (for ~6 months)

4/23/18 • Monday 7:00 a.m. ► RMS Go-Live!

Depending on the due date, complexity, and timing of information available for each proposal, you need to decide if it is best to use PDS or RMS during this transition period.

Change to Budget

If a PDS Doc is approved by 4/20/18 (i.e., Pending status), but it will be submitted to the agency on or after 4/23/18, and a material change to the budget is needed, there are two options:

- Recreate the proposal in RMS
Issue: Duplicate work for DA
- Change the budget without using PDS or RMS
Issue: Lack of budgeting tool and information in the actual application may not match PDS/RMS

Complex project that is due 5/1/18

- The proposal is submitted through OSRS and marked pending in PDS by 4/19/18
Risk: Budget changes after RMS Go-Live.
- The PI will not have complete/final budget information by 4/18/18, so the proposal will be processed through RMS.
Risk: The proposal is developed and finalized under the new/less familiar RMS processes.

Proposal is due on 4/20/18

- It must be routed and marked pending in PDS by 4:00 pm on 4/20/18.

PDS doc approved in PDS, but application will not be ready to send to OSRS until 4/23/18.

- OSRS will be able to review the application by comparing it to PDS.

Fall-back plan - By 4:00 p.m. on 4/20/18

- For all PDS docs that are only in Approved status, OSRS will change the PDS status to Pending, so that the limited data fields convert to RMS. Review of the actual application can occur later by comparing to PDS.
- Any PDS docs that are not yet in Approved status by 4:00 p.m. 4/20/18 will need to be recreated in RMS on or after 4/23/18.

Please visit [The PAAMCO Project Website](#) for additional information. If you have any questions, please contact Teri Medley at 314.747.4444 or medleyt@wustl.edu.

RMS Transition Timeline
April 2018

Monday	Tuesday	Wednesday	Thursday	Friday
2	3	4	5	6
9	10	11	12 COB: DAs Submit all PDS docs to OSRS	13
16 COB: OSRS to approve all PDS docs	17 COB: DAs submit all applications to OSRS	18	19 COB: OSRS to approve/sign/submit all applications	20 4:00 p.m.: PDS changes to inquiry-only (for ~6 months)
23 RMS Go-Live!	24	25	26	27
30		COB = Close of Business	Green = Department Administrators' Actions	Red = Office of Sponsored Research Service's Actions