How to Apply for an Event (Renewal, Amendment, Mid-Term Report, Final Report) The process is the same for ANY Event

(September 2017)

Please note: If you encounter any problems or have any questions, please contact the Romeo Administrator, Bonnie Knott at 807-343-8934 or bknott@lakeheadu.ca

- 1. Log into myInfo using your usual username and password. Select Romeo Research Portal from the web utilities icon (top right). If you need further instructions for logging-in or do not have a myInfo username and password, see manual titled "How to log into the Romeo Research Portal".
- 2. Event Forms can be accessed, completed, and submitted by ANY Project Team Member listed on a project.
- 3. Once logged in, you will be brought to the Research Portal Home page, similar to the following. If an action is required (ie. an Event is due) the Reminders quick link will be highlighted in red:

Role: Principal Investigator
Applications: Drafts
Applications: Requiring Attention
Applications: Under Review
Applications: Post-Review
Applications: Withdrawn
Events: Drafts
Events: Requiring Attention
Reminders
Role: Project Team Member
Role: Reviewer

- 4. Click on Applications: Post Review under Role: Principal Investigator to see all projects (both Awards and Certifications) entered into Romeo in which you are the Principal Investigator. Any projects in which you are a Project Team Member (Co-Investigator, Project Staff, Student, etc.) will be listed the under Role: Project Team Member; Applications Post Review.
- 5. After clicking on **Applications Post-Review**, your screen will look similar to the following:

Back to Home					APPLY NEW News Use	ful Links Setting			
Reset Filters Export To Excel									
	File No	Project Title	Principal Investigator	Application Type	Status Snapshot	Workflow Message			
	Y	Y	Y	All	Y				
View Clone Events	1463499	Test File: Use for Demonstrations	Mrs. Bonnie Knott (VP Research\Research)	SRC: Research Development Fund (RDF) (Awards\Awards)	Project Status: Active Workflow Status: Approval Decision Made				

6. Click on the **Events** button for the file you wish to work with. This will open the file and display the applicable Events available for the current project. Your screen should look similar to the following:

Back to Home	APPLY NEW News Useful Links Settings				
Create New Event					
Event Form Name	Description				
Final Report on Human Research	If you will no longer be contacting participants, a Final Report may be filed. Completion of this report is required for compliance with Tri-Council guidelines. Failure to submit may result in funded project accounts being frozen and new applications no longer accepted by the Research Ethics Board.				
Renewal of Human Ethics Approval Request (REB)	Use this form to renew a current REB approved project.				
Request for Amendment/Addition to a Project Approved by the Research Ethics Board (REB) Use this form for any amendments (revisions to an existing procedure; changes to participant sample, recruitment, study dates, locations, etc).					
File No: 14C/007 Project Title: Start file in: Stady					
Events: Drafts					
Evente: Resulting Attention					

7. Select the title of the desired Event form (ie Request for Amendment). This will open a new window. The screen will look similar to the following:

Event: Amendment FileNo: 1.01111 P1: 1 The Notice of Construction Save Close Print Export to Word Export to PDF Suite	Event Form: Internal Request for an Amendment
Event Info * Internal Request for an Amendment Attachments Errors Note(s)	
	а

- 8. On the first tab, **Event Info**, you have the option of including a note for the Administrator; however, this is not mandatory.
- 9. The 2nd tab will be the title of the Event you are applying for (ie. Request for an Amendment, Final Report, etc.).
- 10. Click on the 2nd tab. This will open the actual Event form. Answer all applicable questions. Your screen should look similar to the following:

Save Close Print Export to Word Export to PDF Submit
Event Info * Internal Request for an Amendment Attachments Errors
* Amendment Request
1.1* Explain why this amendment is required:
1.2" Indicate Type of Amendment Requested:
Amendment to END DATE
Amendment to BUDGET
Other
1.3 If requesting an amendment to the END DATE, select requested NEW end date:
1.4 Please indicate your current END DATE.
0 1.5 Complete this section only if you are seeking approval to expend monies differently from your originally approved budget. Provide the original budget line item and revised budget line item(s);

- 11. Fields marked with a red asterisk are mandatory.
- 12. At any point, you can **SAVE** the application and continue later, **Close**, **Print**, **Export to Word**, or **Export to PDF**. It is recommended to **Save** regularly as Romeo does not have an automatic save feature.
- 13. Once all the information is entered, go to the **Attachments** tab (the 3rd tab). Here you can upload any additional information (if required).

	Event Form: Request for Annual Renewal/Amendment of an Approved Biosafety Project/Prot
Drint Expert to Word Expert to BDE	
Phile Export to Word Export to PDP	
Event Info Request for Annual Renewal/Amendment of an Approved Biosafety Project/Protocol	Attachments Errors
Victoria and a plant encoder sin track	
1. an 110 . 200,	
Information on any new biohazardous agents to be used, must be included.	
Add Attachment	
NOTE : The maximum individual attachment size is 5MB. All attachments larger than 5MB will stall the system	, and your data may be lost.
However, you may upload multiple attachments, provided that each is no larger than 5MB.	

- 14. To add an attachment, click on **Add Attachment**. You have the option of adding a description for your attachment, but this is not mandatory.
- 15. If all mandatory fields are NOT filled in, there will be a final tab called **Errors**. Click on the **Errors** tab to see a listing of the errors. An application cannot be submitted until all mandatory fields are filled in. When all mandatory fields have a response, the **Errors** tab will disappear and the Event can be submitted.

Event Info * Final Report on Human Research Projects Attachments Errors	" is required
Final Report on Human Research Projects -> General Information 1.4 Ways there are proceeding or other changes to this pr	aiost since its original othics annroval? is required
Final Report on Human Research Projects -> General Information: 1.3 Number of participants that voluntarily withdrew from 1	the study: is required.
	X

16. Click on **Submit.** This will open the **Work Flow Action** dialogue box. Add a comment then select **Submit** to forward the Event to the Administrator.

Work Flow Action		
	Submit Cancel	
Comments:		
Comments Required		
Project is complete.		
		.41

- 17. Once the Event is submitted you will receive an email confirming the successful submission. If any further information is required, you will receive an additional email requesting clarification.
- 18. If an Event requires further action, it will be housed as follows. Select the hyperlink.

Back to Home	APPLY NEW News Useful Links Settings
Role: Principal Investigator	·
Applications: Drafts	
Applications: Requiring Attention	
Applications: Under Review	
Applications: Post-Review	
Applications: Withdrawn	
Events: Drafts	
Events: Requiring Attention	
Reminders	
Role: Project Team Member	v
Role: Department Slaning Authority	×

19. Select Edit and view message under Event Workflow Log:

Frank Amendment	File No. (463400 155634				
PI : Knott Bonnie(VP Project Title : Test	File No: 1403499 - 155024 Research(Research) File: Use for Demonstrations				Event Form: Internal Request for an Amendment
Save Close	Print Export to Word Export to PDF Re-Subn	nit			
Event Info Ir © Event Workflow	Iternal equest for an Amendment Attachments Logs				
Timestamp	Activity Log	Workflow State	Workflow Message	User	Role/Group
08/08/2016 15:19	Event Workflow State has been changed from ORS Review to Pending Info by ORS.	ORS Review -> Pending Info by ORS	why was REB approval delayed?	bknott	Office of Research Services/Office of Research Ethics
08/08/2016 15:18	Event Workflow State has been changed from Approval Decision Made to ORS Review.	Approval Decision Made -> ORS Review		bknott	Office of Research Services/Office of Research Ethics
	Event Centur has been channed from Cubmitted by Desearches to Infe				

20. Amend the Event form contents, if required, or when you select **Re-Submit**, include comments to the Administrator in the **Work Flow Action** comment box:

Work Flow Action		
	Submit Cancel	
Comments:		
Comments Required		
,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		
		th.
	Submit Cancel	

21. Once submitted, you will see the Event under Events: Under Review, similar to the following:

File No: 1463499						
Project Title: Test File: Use fo	or Demonstrations					
Events: Drafts						~
Events: Requiring Attentio	on					~
Events: Under Review						~
	Event No	Event Category	Event Submission Date	Event Status	atest Update	
View Event	1463499 - 155624	Amendment (Internal Request for an Amendment)	2016/08/08	Submitted by Researcher	Bonnie Knott (su2) on 8/8/2016 4:14:06 PM	
Events: Post Review						2
Reminders						~

22. You can view details of an Event by clicking on **View Event** (above), but edits to the form are no longer possible once the form has been submitted, unless the Administrator returns the Event to you.

23. Once the Event is reviewed and approved, it will be housed under **Events: Post Review** and the status will change to **Approved**.

/ly Events				
	Form	Category	Status	Sub missionDate
	Y	Y	Y	Y
View Event	Final Report on Human Research Projects	Final Report Submission(HE)	Approved	2013/01/31
View Event		New Approval Process	Approved	2012/12/4

If you encounter any problems or have any questions, please contact the Romeo Administrator, Bonnie Knott at 807-343-8934 or bknott@lakeheadu.ca