

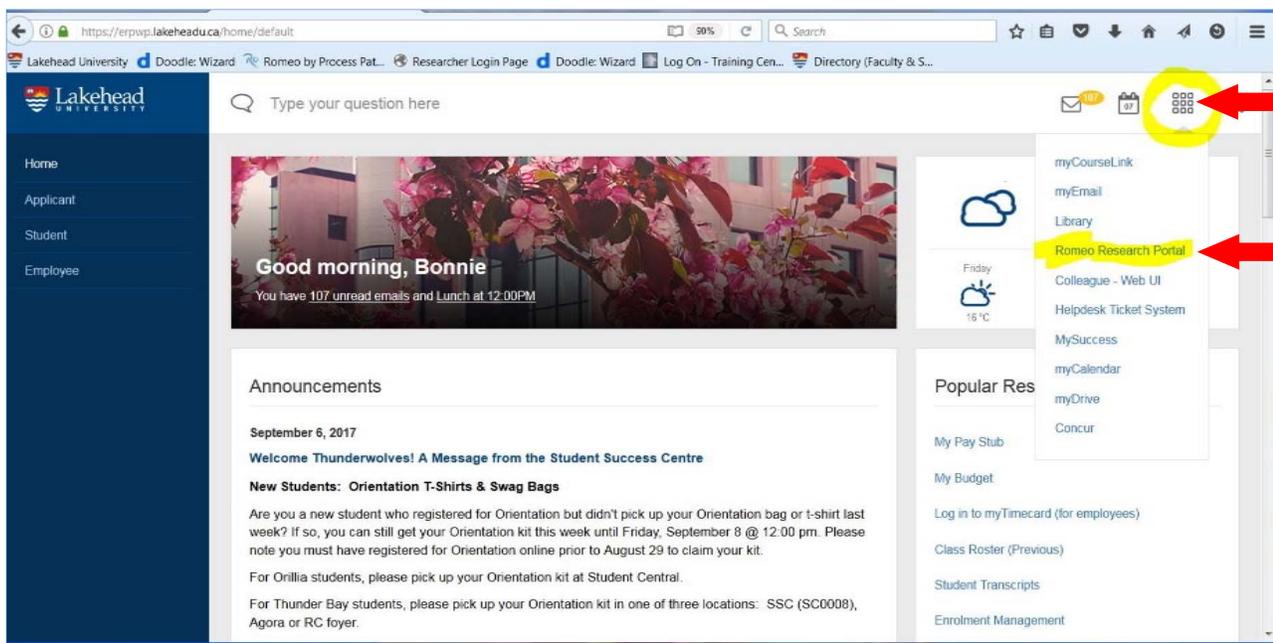
How to Apply for Certification through the Romeo Research Portal

(September 2017)

The process to apply for any Certifications (Human Ethics, Animal Utilization, or Biosafety) is the same.

Please note: Romeo does not have an automatic save feature. Users are encouraged to select the **SAVE** button after completing each tab, or more frequently, and before leaving the application for an extended period of time. If you encounter any problems or have any questions, please contact the Romeo Administrator, Bonnie Knott at 807-343-8934 or bknot@lakeheadu.ca

1. If you have a Lakehead myInfo account, log into Romeo by first logging into myInfo using your usual username and password. Then select **Romeo Research Portal** from the web utilities icon (top right). This will bring you right into Romeo without needing another username and password. If you do not have a myInfo account, you will need to self-register at: <https://romeo.lakeheadu.ca/Romeo.Researcher/login.aspx>



2. Once logged in, you will be brought to the Romeo Research Portal Home page, similar to the following:



- To access application forms available in Romeo, click on **APPLY NEW**. You will be brought to the following screen which lists all active online applications. There are applications under the four categories: Awards; Research Certification (ACC); Research Certification (Biosafety/Radiation); and Research Certification (REB). Select the title of the appropriate application.

Awards		
Application Name	Description	Status
Regional Research Fund	To stimulate pilot research of an applied nature with particular relevance for Northwestern Ontario. Deadline Date: JUNE 12 by 4:30 pm. Open to faculty members in the Schools of Kinesiology, Nursing, Outdoor Recreation and Parks & Tourism and Faculties of Business Administration, Education, Engineering and Natural Resources Management.	Open
SRC: Conference Travel	Applicants must apply prior to the time of the conference unless the meeting is announced after the deadline. Deadline Dates: May 10 and October 10 (LATE OR INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED).	Open
SRC: Open Access Author Fund	Deadline Date: On-going. PLEASE NOTE: Romeo is compatible with Internet Explorer, Firefox and Google Chrome. Although most features work in Safari, Safari is NOT a recommended browser for Romeo at this time.	Open
SRC: Publication Assistance	Deadline Dates: May 10 & October 10 - by 11:59 pm (LATE OR INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED).	Open
SRC: Research Development Fund (RDF)	Deadline Dates: March 10 & October 10 (LATE OR INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED).	Open
SRC: Visiting Scholar	Deadline dates for submission: March 10 & October 10 (LATE OR INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED).	Open
Vice-President (RI) Strategic Fund: Emergency Research Equipment Fund	To cope with unexpected emergency repairs for major equipment. No application deadline.	Open
Vice-President (RI) Strategic Fund: International Research Collaboration Grant	To facilitate the involvement of Lakehead researchers in international research networks and programs and to support the development of new and existing international collaborations within the well-established research priorities of Lakehead University's Strategic Research Plan.	Open
Vice-President (RI) Strategic Research BRIDGE Fund	To encourage and support those faculty members seeking to restart their research activities following a full-time administrative appointment or a lengthy absence. Deadline Date: November 1.	Open
Vice-President (RI) Strategic Research Development Fund	There are 3 components for this internal fund: (1) Sustainability Studies Research Fund, (2) Strategic Research Opportunity Fund, and (3) UMD Research Collaboration Grant.	Open
Research Certification (ACC)		
Application Name	Description	Status
Animal Utilization Protocol (Revised 10/2015)	Application for use of animals in research. Please note: Romeo is compatible with Internet Explorer, Firefox and Google Chrome. Although most features work in Safari, Safari is NOT a recommended browser for Romeo at this time.	Open
Research Certification (Biosafety/Radiation)		
Application Name	Description	Status
Application for Work with Biohazards	Required prior to commencing projects involving biological hazards.	Open

- All identified Project Team Members can contribute to an application form pre-submission, but only the Principal Investigator (PI) can submit an application form. The e-submission and review process represents the institutional signature process, eliminating the need to circulate hard copy signature forms. If you are not the PI, change the PI as the last step (see #27).
- On the **Project Info** tab, enter the title of your project, the anticipated **Start Date**, **End Date**, and any appropriate **Key Words**.
- Fields marked with a **red asterisk (*)** are mandatory.
- At any point, you can **SAVE** the application and continue later. Remember, Romeo does not have an automatic save feature. Users are encouraged to select the **SAVE** button after completing each tab, or more frequently, and before leaving the application for an extended period of time.

8. If the project is NOT funded or if the project funding is NOT administered through Lakehead University, you can skip the box on **Related Awards** and proceed to the **Project Team Info** tab (point #10 below).
9. If the project funding is administered through Lakehead University, click on the **Search** key located under **Related Awards** (see page 3). All projects associated with your name should appear. Click **Select** for the funding project that is tied to your ethics application. If your project is not listed, please contact Sue Wright, Research Ethics and Administrative Officer at 807-343-8283.

Save Close Print Export to Word Export to PDF
Submit

* Project Info. Project Team Info. * Research Ethics Board Researcher's Agreement Form Attachments Logs Errors

Project Title*:

Start Date: 

End Date: 

Keywords: 

Related Awards

If you are a student, please ignore this section and continue to the next tab.
If you are a non-student (e.g faculty, staff) and have applied for, or have been awarded, research funding, click 'Search' to locate and attach the related research funding. If the related research funding is not found please ignore this section and continue to the next tab.



Award #	Title	Award Status	PI Last Name	PI First Name	Sponsors Summary	Notes
No records to display.						
Ready						

Award Application List

Close

Options	File #	Title	PI Last Name	PI First Name	Status
[Select]	1462819	Testing VP Stat applicaton	Knott	Bonnie	Submitted
[Select]	1461398	TEST FILE - to be used for playing around	Knott	Bonnie	Active

Close

10. Proceed to the **Project Team Info** tab. Your screen will look similar to the following. The Principal Investigator Info section will auto-populate with your profile information. For system security and data integrity purposes, your email address and affiliation can only be edited or updated by the Romeo Administrator. Contact the Administrator if your profile information is incorrect or out-of-date. *Affiliation*, will determine where your application is forwarded for online approval (workflow).

Application Ref No: 1032 Application Form: SRC: NSERC Conference Travel

Save Close Print Export to Word Submit

Project Info **Project Team Info** Project Sponsor Info SRC: NSERC Conference Travel Attachments Logs Errors

Principal Investigator Info.

Retrieve info

Prefix: Mrs. Last Name: Klymenko First Name: Anne

Affiliation: VP Research/Research

Rank: STAFF Gender: Female Institution: Lakehead University

Phone 1: 807-343-8223 Phone 2:

Email: aklymenk@lakeheadu.ca Fax:

Primary Address: Alternate Address:

Preferred Address: Primary Address Alternate Address Country: Canada

Comments:

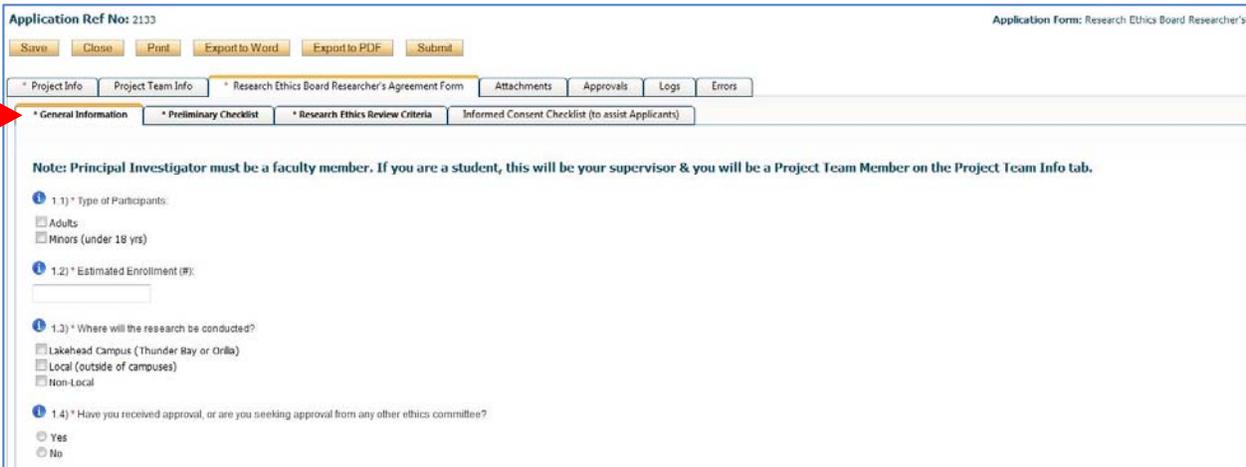
Other Project Member Info:

Add New

Last Name	First Name	Role In Project
No records to display.		

Ready

11. If you are associated with multiple departments, select the blue arrow across from **Affiliation**. Each department should be listed. Select the appropriate department. This will advise Romeo which department to send the application to for approval (your department chair). If an alternate department should be listed, contact the Romeo Administrator at bknot@lakeheadu.ca
12. **Note: If you are a student, the Principal Investigator must be a faculty member. If you are a student, this will be your supervisor and you will add yourself as a Project Team Member on the Project Team Info tab.** Students or Project Team Members can fill out the application, then once complete, change the PI to their supervisor. **It is recommended to change the PI as the last step**, once the application is completed and ready for submission (see #27).
13. For additional Project Members, click on **Add New** under **Other Project Member Info**. If they are already in the database, you can search by last name. Select **Search Profiles**, type in the last name where indicated then click **Search**. Click **Select** for the desired researcher. Cells will be auto populated. **DO NOT HAND TYPE DATA FOR THIS SECTION**. If the researchers are not in the database, contact the Romeo Administrator at bknot@lakeheadu.cato to have them added.
14. The Role of each Team Member is defaulted to Co-investigator. Ensure **Role in Project** (ie. Co-investigator, Student, Collaborator, Partner, Project Staff) is accurately selected for each Team Member.
15. Anyone who is listed as a 'Project Member' will have access to view the file through the Romeo Research Portal.
16. Proceed to the 3rd tab, this will be the title of your application (ie. Research Ethics Board Researcher's Agreement Form). It will open an additional set of tabs.
17. Some questions have additional information provided under the field instructions, click 
18. Complete all required or applicable fields.
19. Reminder: All fields marked with a **red asterisk (*)** are mandatory.



Application Ref No: 2133 Application Form: Research Ethics Board Researcher's

Save Close Print Export to Word Export to PDF Submit

* Project Info Project Team Info * Research Ethics Board Researcher's Agreement Form Attachments Approvals Logs Errors

* General Information * Preliminary Checklist * Research Ethics Review Criteria Informed Consent Checklist (to assist Applicants)

Note: Principal Investigator must be a faculty member. If you are a student, this will be your supervisor & you will be a Project Team Member on the Project Team Info tab.

1.1) * Type of Participants:

Adults

Minors (under 18 yrs)

1.2) * Estimated Enrollment (#):

1.3) * Where will the research be conducted?

Lakehead Campus (Thunder Bay or Orillia)

Local (outside of campuses)

Non-Local

1.4) * Have you received approval, or are you seeking approval from any other ethics committee?

Yes

No

20. For REB applications, the **Informed Consent Checklist** tab is a checklist included for your reference.
21. Once all the information is entered go to the **Attachments** tab. Here you are able to attach any required documents as indicated.

Application Ref No: 2133 Application Form: Research Ethics Board Researcher's Agreement Form

Save Close Print Export to Word Export to PDF Submit

Project Info Project Team Info Research Ethics Board Researcher's Agreement Form **Attachments** Approvals Logs Errors

Please note, attachments can be uploaded individually or all together as one attachment

I confirm I have attached the following (if applicable):

- All research instruments (ie. surveys, interview questions)
- Cover letters and consent forms on Lakehead University letterhead (or NOSM letterhead if appropriate). In preparing cover letters and consent forms please use the Informed Consent Checklist
- Parental Consent/Assent forms
- A copy of any advertisements used to recruit participants
- A statement of introduction (required when phone surveys are conducted)
- Debriefing/referral information for the participant
- A copy of my TCPS 2 Certificate of Completion
- A copy of TCPS 2 Certificate of Completion for all investigators listed on this application with an affiliation with Lakehead University

A signature page is mandatory for additional Project Team Members (ie. students, co-investigators, etc.) (Principal Investigator exempt) working under this Agreement.

Click here for Signature page.

For REB Reviewers - Please see attached Evaluation Form for review criteria

Evaluation_Form.pdf

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.

22. Click on **Add Attachment** (see above). You have the option of including a description and/or choosing a description from the drop down list for your attachments (ie, Supporting Documents REB). Select **Add Attachment** to complete the transaction.

Upload Attachment

Description:

Upload Attachment:

Version Date:

Doc / Agreement:

--Select One--
 Amendment Approval
 Amendment Requested
 Approval Letter
 Evaluation Form
 Final Report
 Proposal
 Renewal Letter
 SOP
 Supporting Documents (AUP)
 Proposal

Browse...

Add Attachment **Cancel**

23. 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 any 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.

24. At any time during the application process, you can **Save, Print, Close, Export to Word** and/or **Export to PDF**, but an application can only be submitted when the **Errors** tab disappears.

25. The **Approvals** tab is for **Department Chairs Only**. If you are a Chair, you will require your Dean's approval. **If the PI is not a Chair, ignore this tab and proceed to item #27.**

26. Department Chairs, select an alternate to approve your application under **Other Approvals** on the **Approvals** tab. If the appropriate person is not listed, contact bknott@lakeheadu.ca

27. To change the PI, on the **Project Team Info** tab, select **Change PI**. If they are already in the database, you can search by last name. Type in the last name where indicated then click **Search**. Click **Select** for the desired researcher. Cells will be auto populated. **DO NOT HAND TYPE DATA FOR THIS SECTION**. If the researcher is not in the database, contact the Romeo Administrator at bknott@lakeheadu.cato to have him/her added.

28. If you are not the PI, add yourself as a Project Team Member. Click on **Add New** under **Other Project Member Info**. Select **Search Profiles**, type in the last name where indicated then click **Search**. Click **Select** for the desired researcher. Select **Save** at the top of the page.

29. Select **Submit** (PI only) to send the application through the on-line approval process (workflow). The application will automatically be forwarded to the Department Chair/Director of the **Affiliation** listed for the PI on the **Project Team Info** tab.

30. Once you select **Submit** above, you will see the following screen. Include a message to the Department Chair/Director (as shown below).

Submit Cancel

Comments:

Please review & approve. ←

Submit Cancel

31. Comments above, are displayed with the application as follows, and are housed under the **Logs** tab (**Application Workflow Log**). The **Logs** tab tracks all data entry and workflow activities.

APPLY NEW | News | Useful Links | Settings |

	Project Title	Principal Investigator	File No	Application Form Name	Work Flow State	Last Saved	Message
View Clone	Testing NSERC Publication Assistance	Mrs. Bonnie Knott		SRC: NSERC Publication Assistance (Awards\Awards)	Department Signing Authority Review	10/4/2012	Please review & approve. [Action: Submit] ←
View Clone	Testing VP Stat applicaton	Mrs. Bonnie Knott	1462819	Vice-President (Research, Economic Development & Innovation) Strategic Fund (Awards\Awards)	ORS Review		[Action: Approve]

32. Once you **Submit**, you will receive confirming emails each time the application is forwarded and approved through the workflow. If further clarification is required, you will receive an email indicating so.
33. Once approved by the Chair/Director, the application will automatically be forwarded to the Office of Research Services or the Biosafety Officer for Applications for Work with Biohazards.
34. At any time you can view the status of your application by logging into the Romeo Research Portal. Click on **Applications: Under Review**.

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Role: Principal Investigator

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- [Events: Drafts](#)
- [Events: Requiring Attention](#)
- [Reminders](#)

Role: Project Team Member

- [Applications: Drafts](#)
- [Applications: Requiring Attention](#)
- [Applications: Under Review](#)
- [Applications: Post-Review](#)
- [Applications: Withdrawn](#)
- [Events: Drafts](#)
- [Events: Requiring Attention](#)
- [Reminders](#)

35. Look under the **Logs tab**; select **Application Workflow Log** (sample below). Here you will see a log by date whenever an action was taken on the project.

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

Save Save & Close Approval Process Close

Project Info. Project Team Info. Project Sponsor Info. Document Tracking SRC: Research Development Fund (RDF) Milestones Events Communications **Log** 

Log Details

Application Log Application Workflow Log

Timestamp	Log	Workflow State	Message	User	Role
2014/07/15 10:22	Project Work Flow State has been changed from Approval Decision Made to ORS Review	Approval Decision Made -> ORS Review		bknot	Office Service
2014/03/05 15:47	Project Status has been changed from Submitted to Active Project Work Flow State has been changed from ORS Review to Approval Decision Made	ORS Review -> Approval Decision Made		bknot	Office Service
2014/01/29 10:31	Project Work Flow State has been changed from Pending Info by ORS to ORS Review Pour le chercheur Mrs. Anne Klymenko -> Le rôle dans le projet a été changé de 'Primary Investigator' à 'Co-Investigator' Le membre de l'équipe Bonnie Knott a été ajouté. (son rôle est Primary Investigator) For Investigator Mrs. Anne Klymenko -> Role In Project has been changed from 'Primary Investigator' to 'Co-Investigator' Project Member Bonnie Knott has been Added. (role is Primary Investigator)	Pending Info by ORS -> ORS Review	testing re-submission after changing PI [Action: Re-Submit]	Bonnie Knott (su2)	Princi
2014/01/29 09:35	Project Work Flow State has been changed from ORS Review to Pending Info by ORS Program(SRC - NSERC Research Development Fund)/Agency(Lakehead University)/Grant Holder(Mrs. Anne Klymenko) has been Deleted	ORS Review -> Pending Info by ORS	Testing a file - no action required by you.	bknot	Office Service
2013/10/09 13:30	New File Submitted By Researcher Project Work Flow State has been changed from Pre Submission to ORS Review	Pre-Submission -> ORS Review	Here is my RDF application for your consideration. [Action: Submit]	Anne Klymenko (su)	Princi