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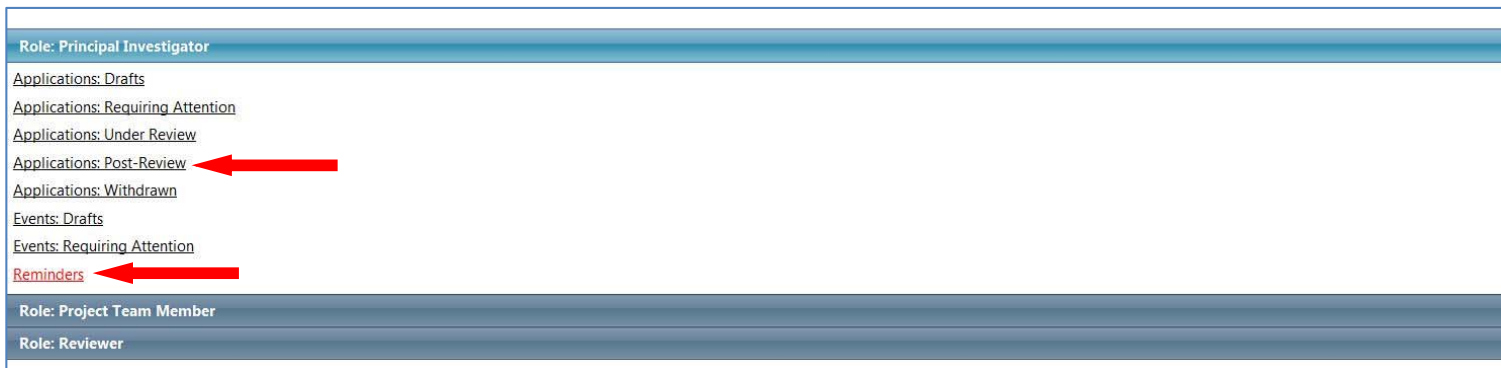
4. Click on **Applications: Post Review** under Role: Principal Investigator to see all projects (both Awards and Certifications) entered into Romeo in which you are the Principal Investigator. Any projects in which you are a Project Team Member (Co-Investigator, Project Staff, Student, etc.) will be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

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:

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:

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:
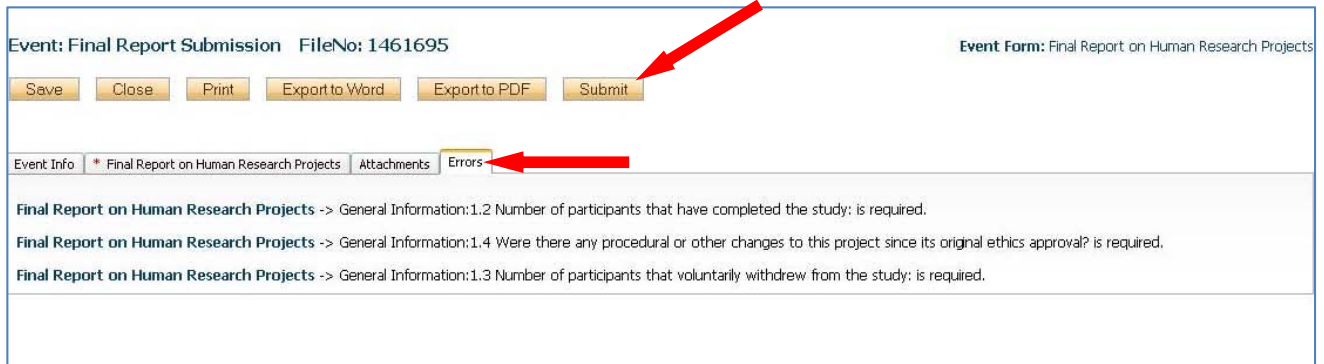
11. **Fields marked with a red asterisk are mandatory.**

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).

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.
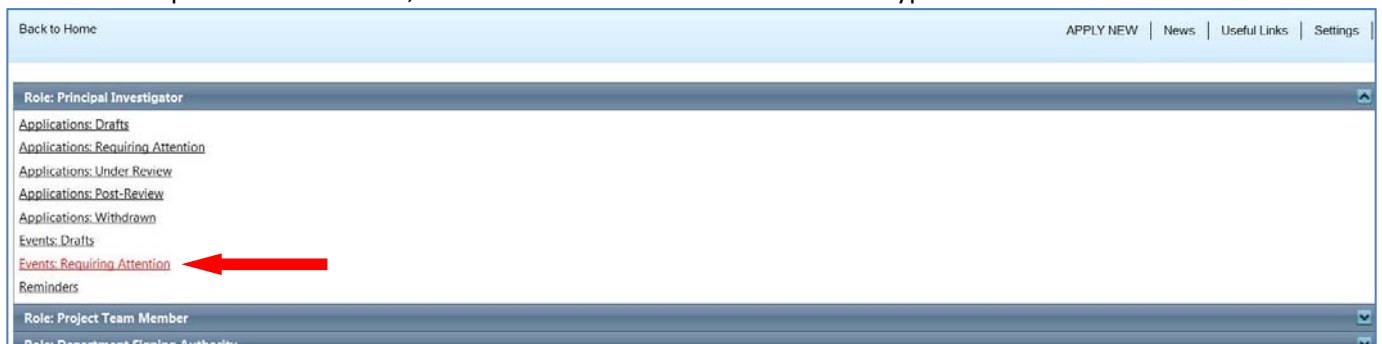
Event: Final Report Submission   FileNo: 1461695   Event Form: Final Report on Human Research Projects

Save | Close | Print | Export to Word | Export to PDF | Submit

Event Info | * Final Report on Human Research Projects | Attachments | Errors

Final Report on Human Research Projects -> General Information:1.2 Number of participants that have completed the study: is required.

Final Report on Human Research Projects -> General Information:1.4 Were there any procedural or other changes to this project since its original ethics approval? is required.

Final Report on Human Research Projects -> General Information:1.3 Number of participants that voluntarily withdrew from the study: is required.

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.

Submit | Cancel
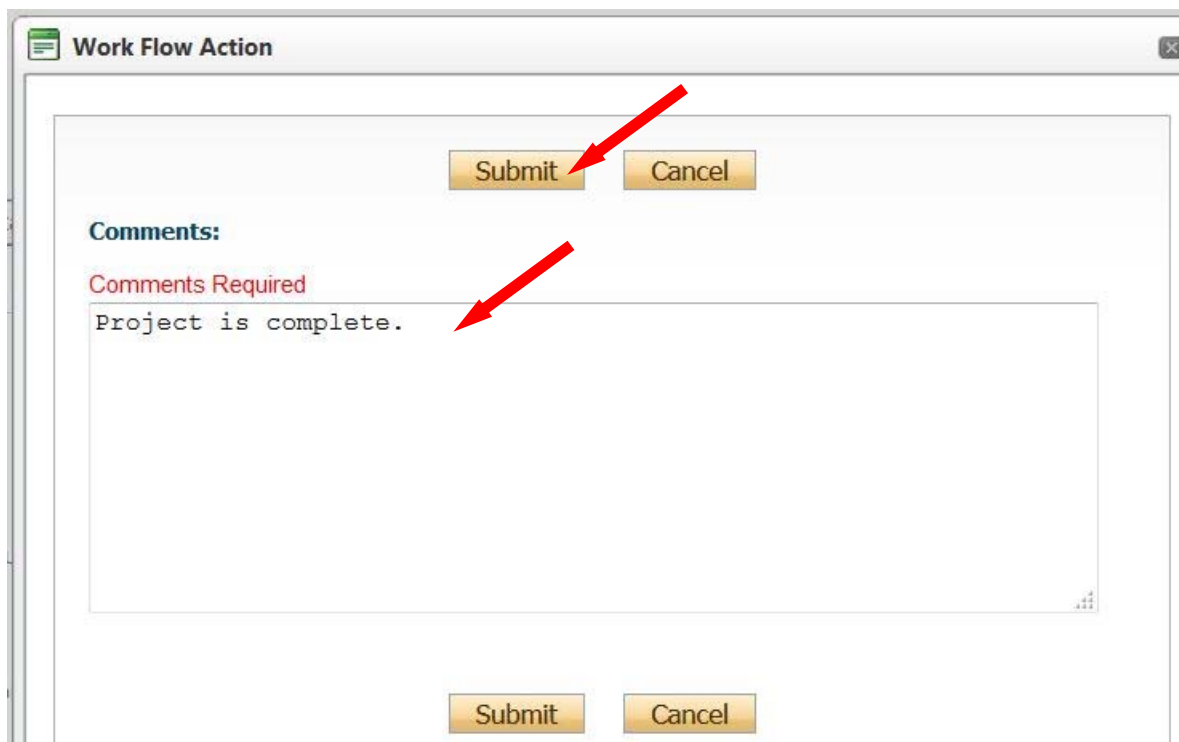
17. Once the Event is submitted you will receive an email confirming the successful submission. If any further information is required, you will receive an additional email requesting clarification.

18. If an Event requires further action, it will be housed as follows. Select the hyperlink.

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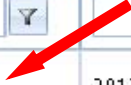
Role: Project Team Member
Role: Department Signing Authority

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

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:

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

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**.

	Form	Category	Status	SubmissionDate
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

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