

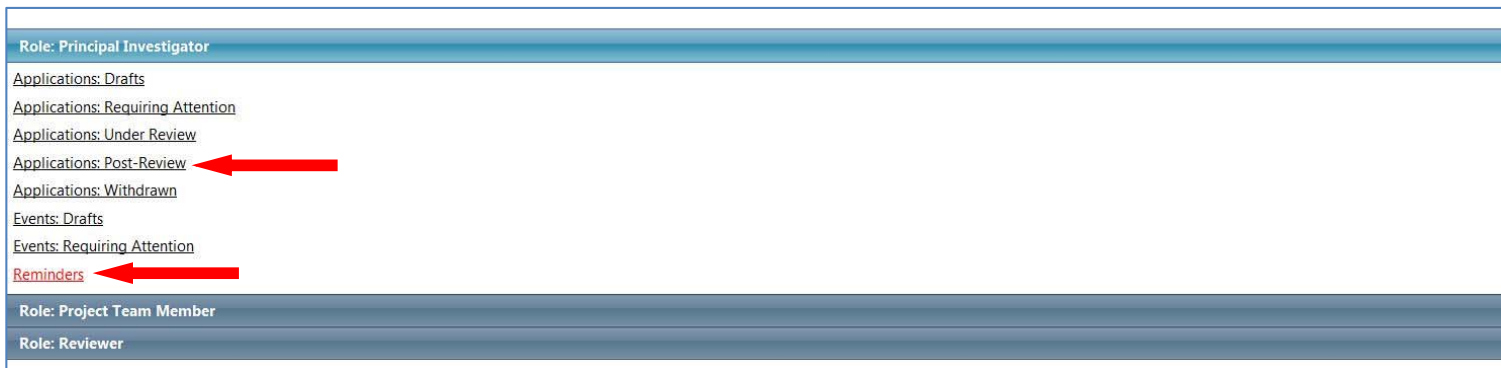
How to Apply for an Event (Renewal, Amendment, Mid-Term Report, Final Report)

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:

The screenshot shows a table with the following columns: File No, Project Title, Principal Investigator, Application Type, Status Snapshot, and Workflow Message. A red arrow points to the 'Events' button in the first row.

File No	Project Title	Principal Investigator	Application Type	Status Snapshot	Workflow Message
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: 14C0007
 Project Title: S... ..

Events: Drafts ▼
 Events: Requiring 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 Event Form: Internal Request for an Amendment
 File No: 14C0007
 PI:

Save Close Print Export to Word Export to PDF Submit

Event Info * Internal Request for an Amendment Attachments Errors

Note(s)

→

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:

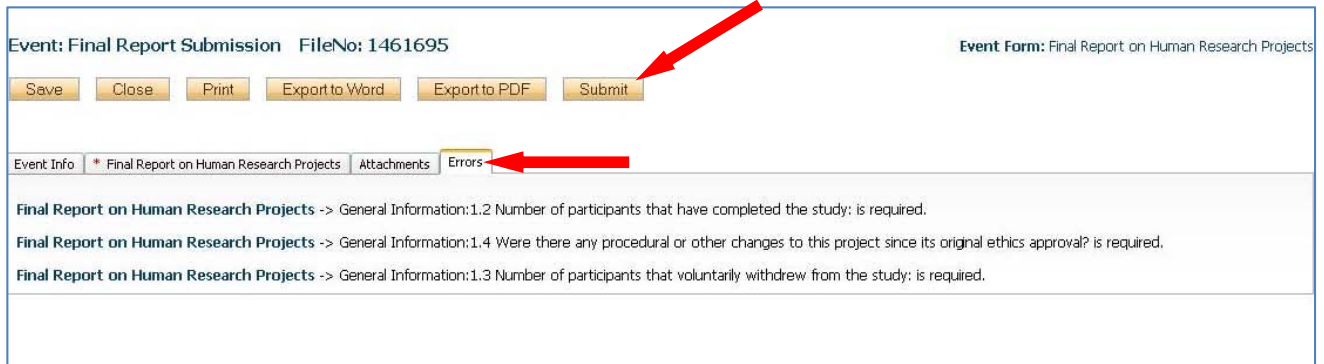
11. Fields marked with a **red asterisk** are mandatory.

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.

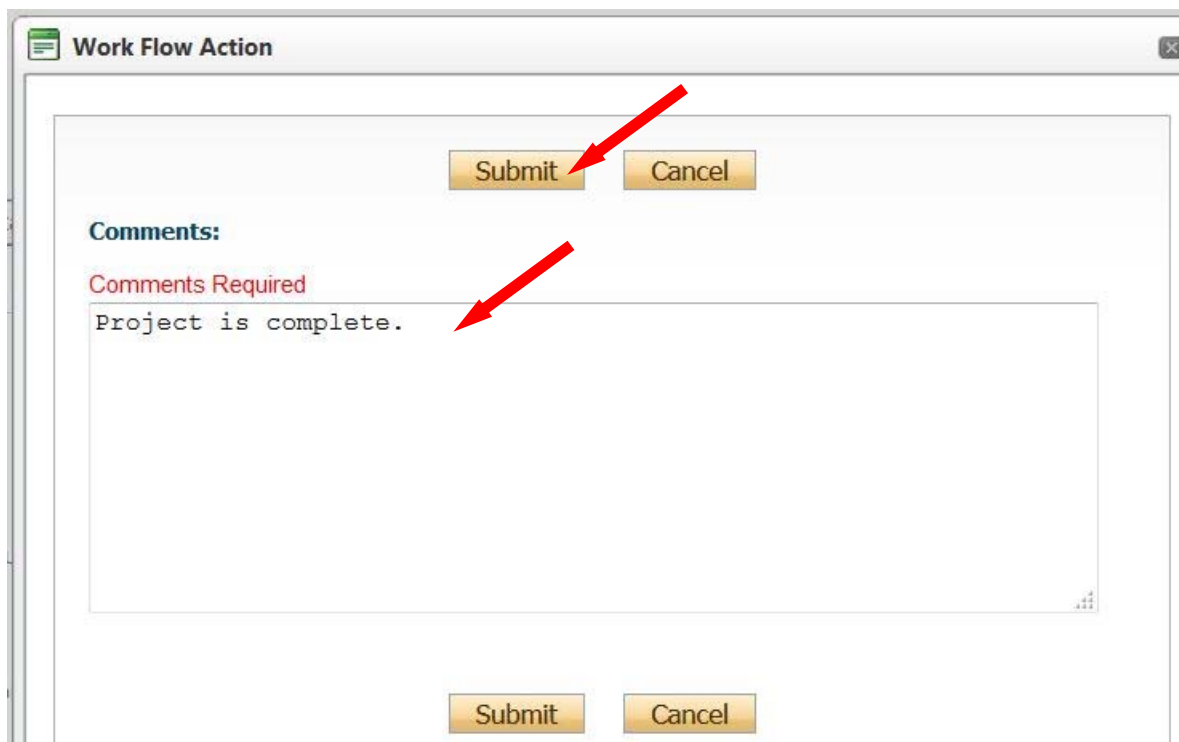
13. Once all the information is entered, go to the **Attachments** tab (the 3rd tab). Here you can upload any additional information (if required).

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.

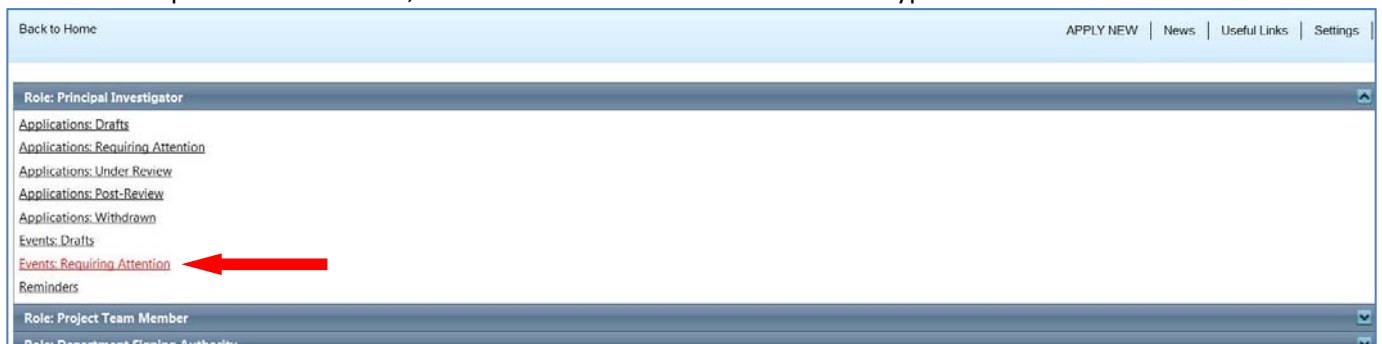


16. Click on **Submit**. This will open the **Work Flow Action** dialogue box. Add a comment then select **Submit** to forward the Event to the Administrator.



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.



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

Event: Amendment File No: 1463499 - 155624
 PI : Knott Bonnie(VP Research)Research
 Project Title : Test File: Use for Demonstrations
 Event Form: Internal Request for an Amendment

Save Close Print Export to Word Export to PDF Re-Submit

Event Info Internal Request for an Amendment Attachments Logs

Event Workflow Log Event Log

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?	blnott	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		blnott	Office of Research Services/Office of Research Ethics

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

Project is complete.

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 for Demonstrations

Events: Drafts
 Events: Requiring Attention
 Events: Under Review
 Events: Post Review
 Reminders

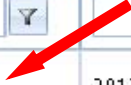
	Event No	Event Category	Event Submission Date	Event Status	Latest Update
View Event	1463499 - 155624	Amendment (Internal Request for an Amendment)	2016/08/08	Submitted by Researcher	Bonnie Knott (su2) on 8/8/2016 4:14:05 PM

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**.

My Events

	Form	Category	Status	SubmissionDate
	<input type="text"/> ▼	<input type="text"/> ▼	<input type="text"/> ▼	<input type="text"/> ▼
<input type="button" value="View Event"/>	Final Report on Human Research Projects	Final Report Submission(HE)	Approved	2013/01/31
<input type="button" value="View Event"/>		New Approval Process	Approved	2012/12/4



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