# How to Apply for Certification through the Romeo Research Portal   (September 2017)

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

Please note: Romeo does not have an automatic save feature. Users are encouraged to select the <mark>**SAVE**</mark> button after completing each tab, or more <mark>frequently,</mark> 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 bknott@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
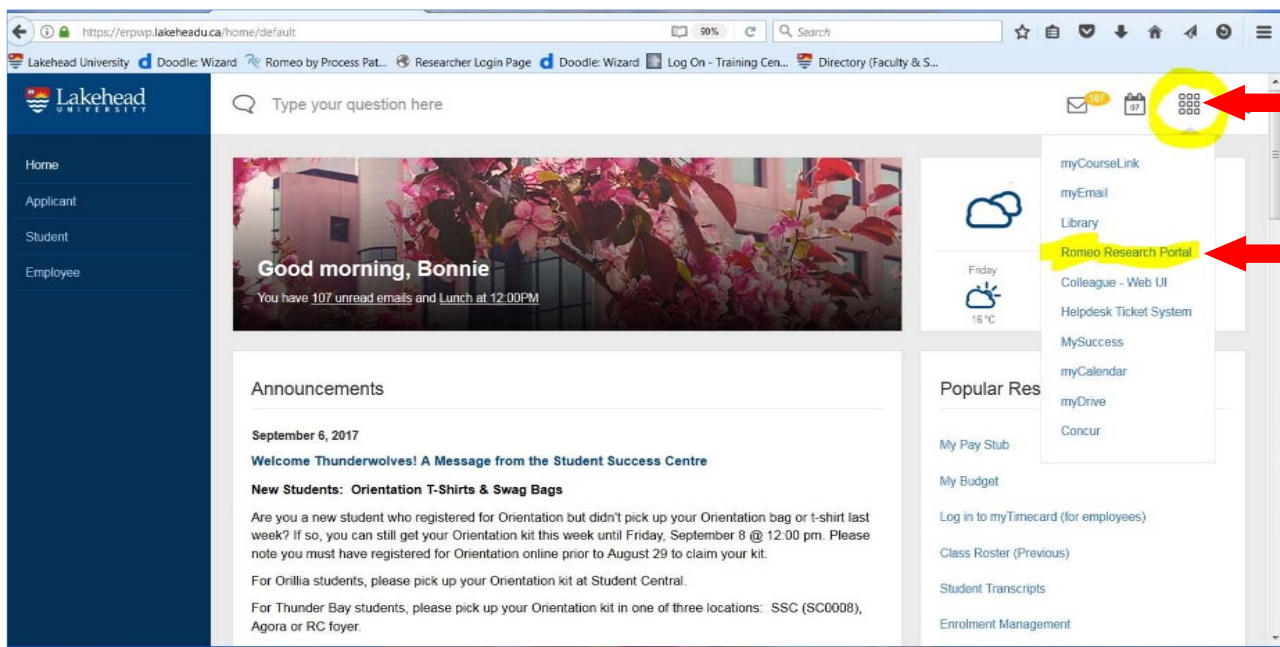
2. Once logged in, you will be brought to the Romeo Research Portal Home page, similar to the following:

3. 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.

4. 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).

5. On the **Project Info** tab, enter the title of your project, the anticipated **Start Date**, **End Date**, and any appropriate **Key Words**.

6. **Fields marked with a red asterisk (*) are mandatory.**

7. 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.

Application Ref No: 1084

| 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: [▾]   [Add]

[Clear All]

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.

[Search]
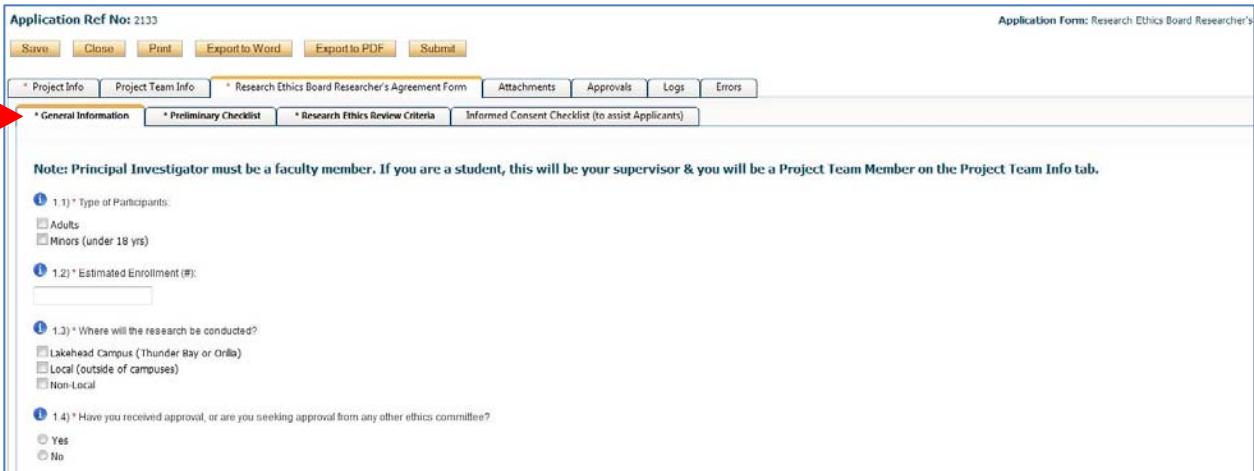
	Award #	Title	Award Status	PI Last Name	PI First Name	Sposnsors Summary	Notes
No records to display.							

Ready

Award Application List

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

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).

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 bknott@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 bknott@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.

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.

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.

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.

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 |

Project Info -> Project Title is required.

Research Ethics Board Researcher's Agreement Form -> General Information:1.1 Type of Participants: is required.

Research Ethics Board Researcher's Agreement Form -> General Information:1.2 Estimated Enrollment (#): is required.

Research Ethics Board Researcher's Agreement Form -> General Information:1.3 Where will the research be conducted? is required.

Research Ethics Board Researcher's Agreement Form -> General Information:1.4 Have you received approval, or are you seeking approval from any other ethics committee? is required.

Research Ethics Board Researcher's Agreement Form -> General Information:1.6 Is this project's funding administered through Lakehead University? is required.

Research Ethics Board Researcher's Agreement Form -> General Information:1.7 Is this project's funding administered outside of Lakehead University? is required.

Research Ethics Board Researcher's Agreement Form -> Preliminary Checklist:2.1 Will your study involve more than minimal physical risk to your participants? (For a definition of minimal risk, see TCPS2, Chapter 2, Section B.) is required.

Research Ethics Board Researcher's Agreement Form -> Preliminary Checklist:2.2 Will your study involve the use of high-risk test instruments, i.e. surveys that may reveal that the participant intends to participate in dangerous activities such as self harm or harm to others? is required.

Research Ethics Board Researcher's Agreement Form -> Preliminary Checklist:2.3 Will your study involve more than minimal psychological risk to your participants? is required.

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).

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.

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**.

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 bknott@lakeheadu.ca

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**		bknott	Office Servic
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**		bknott	Office Servic
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.	bknott	Office Servic
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