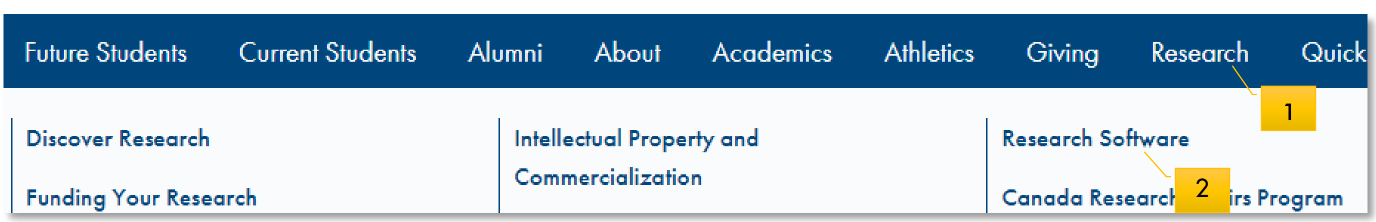
ROMEO @ NU: QUICK GUIDE

USING THE RESEARCHER'S PORTAL

The Researcher's Portal for NU is available here or through the Research section of Nipissing's website.



As in the screen shot above, click Research > Research Software > Romeo > Romeo Login/Registration. This will take you to the log-in page of the NU-branded Romeo site.

To log in for the first time:

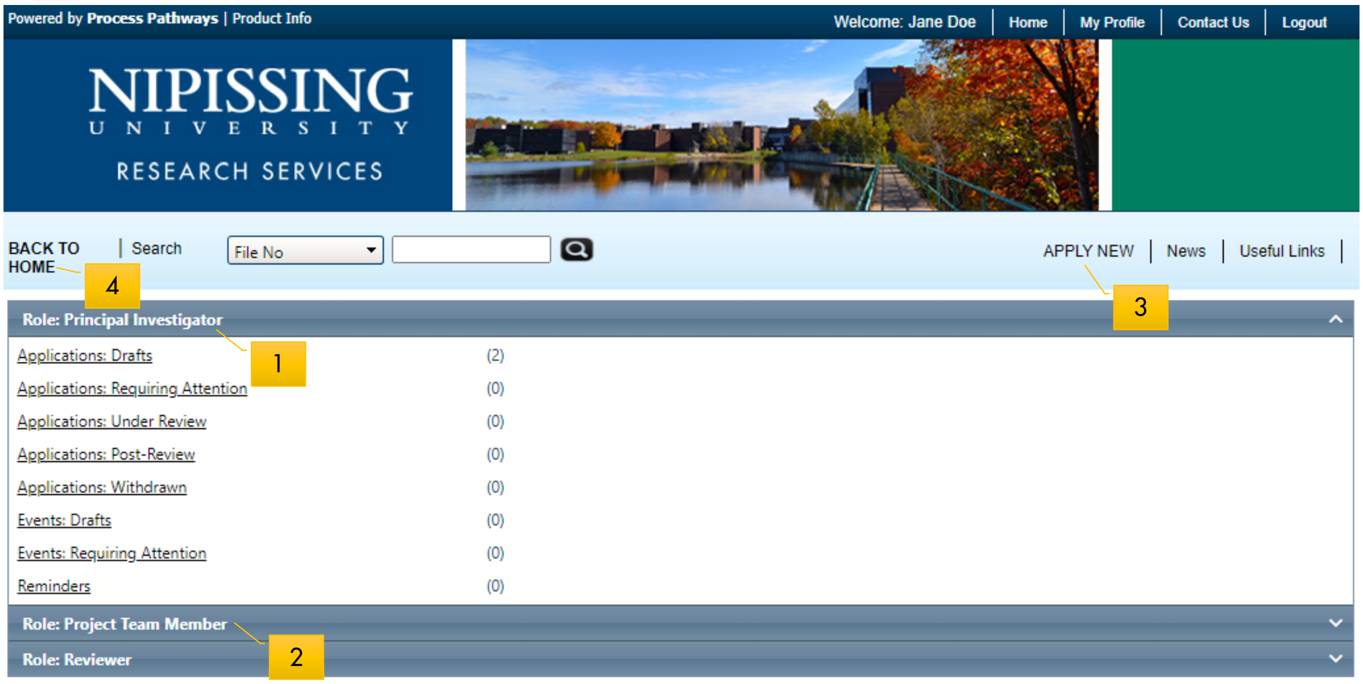
1. Click the yellow **Register** button (beside the Login button).
2. Fill out your name, contact details, and affiliations (both Faculty and Department). Click **Register**.
3. You will be sent an email to complete your registration by clicking a link.

When you log in, you will see the Researcher's Home Page.

Home Page

Your Home Page displays links to all the applications connected with your profile. Use the buttons below to navigate:

1. **Role: Principal Investigator** – click on the links in this section to find applications for which you are the PI Most of the headings are self-explanatory. **Applications: Requiring Attention** is where you'll find any applications for which reviewers have asked for changes/clarifications.
2. **Role: Project Team Member** – use this section to find applications for which you are a team member (not PI)
3. **APPLY NEW** – click this button to start a new application from a list of application forms
4. **BACK TO HOME** – this button will bring you back to your home page, showing all of your applications



Tips Before You Start

Save and return	At any point in the process, you may **Save** and **Close** an application and work on it at a later date. The information entered will be saved and you can access it again through your Researcher's home page under **Applications: Drafts**.
Time out	Though Romeo has no auto-save feature, it does have a time out feature! If you need to step away from your computer, you should always hit **Save** and **Close** as a precautionary measure, to prevent your work being lost and the application locking. Contact ethics@nipissingu.ca for support.
Questions?	If you require any assistance, please contact the Research Coordinator at research@nipissingu.ca.

APPLICATION BASICS

To access a new Application form, click **APPLY NEW** on your home page (#3 in the screen shot above).

Select the desired Ethics or Awards/Travel Form. For research involving human participants, the most commonly-used form is the **Protocol for Research Involving Human Participants**. (Any research project involving human participants or animals must receive the appropriate committee approval before the project can start.)

Office of Research Ethics

Application Name	Description	Status
Institutional Approval Request	Complete this form if you have received ethics approval from another institution (home/host) and are looking for approval from Nipissing University. Please provide a copy of the host/home institutions protocol, including all attachments and REB approval(s) received.	Open
Protocol for Research Involving Human Participants	Complete this form for all research involving human participants, including all course-based research, unless your project has already received ethics approval from another home/host institution (in which	Open
Protocol for Researc… Use of Data		
Protocol for Textual… Arts-Based or Arts In…		
Animal Utilization Pro…		

Office of Research Services

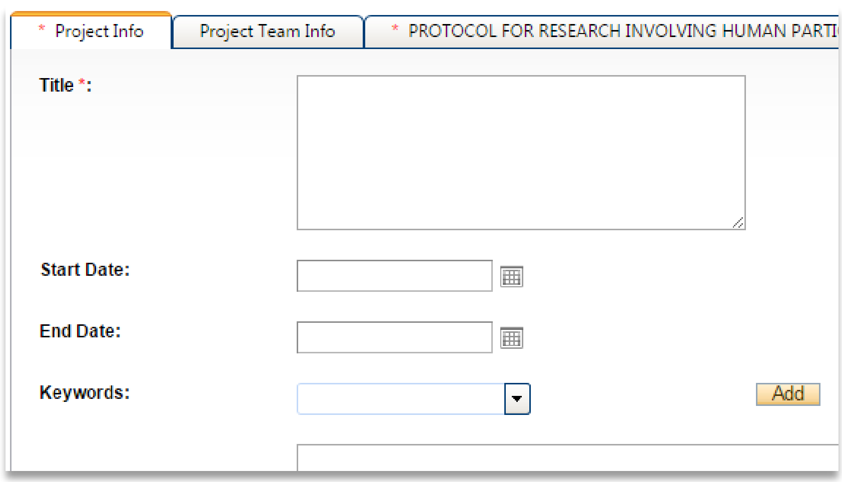
Application Name	Description
Pre-Authorization for Faculty/Research Travel	This form must be completed prior to all faculty and/or research travel.
External Research Funding Applications	This form must be completed by all Nipissing faculty members submitting hard copy or online Research grant / award / contract applications as either principal investigators or co-investigators. This application facilitates the internal process for review and institutional approval of an application, prior to external submission. This file is to be submitted no later than 3 weeks prior to the external deadline.
IRG - Internal Research Grant Application	The IRG is intended to assist faculty members who do not currently hold Tri-Agency funding in the development of research programs that would lead to externally funded projects. Applications for the next competition will open February 1, 2023.
SIG - SSHRC Institutional Grant	SIGs are intended to help postsecondary institutions maintain or strengthen research capacity and

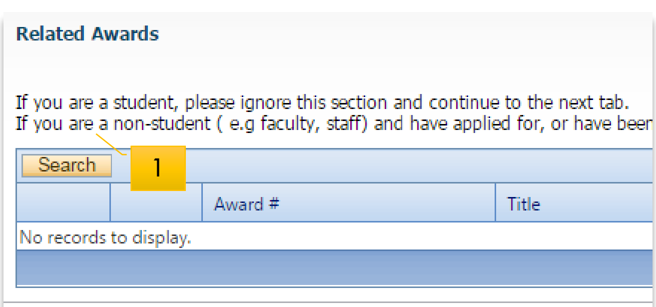
Tab # 1: Project Info

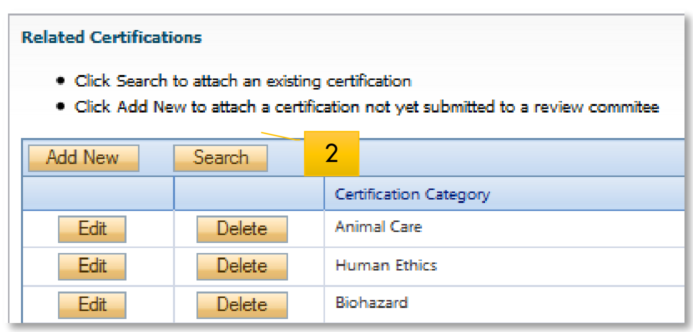
Enter the project title, start, and end date, as well as any keywords which describe your project.

1 **For Ethics forms**: If the project is connected to a research award, click **Search** under *Related Awards* to select the award.

2 **For Awards forms**: If the project is connected to an existing ethics protocol, click Search under *Related Certifications*.

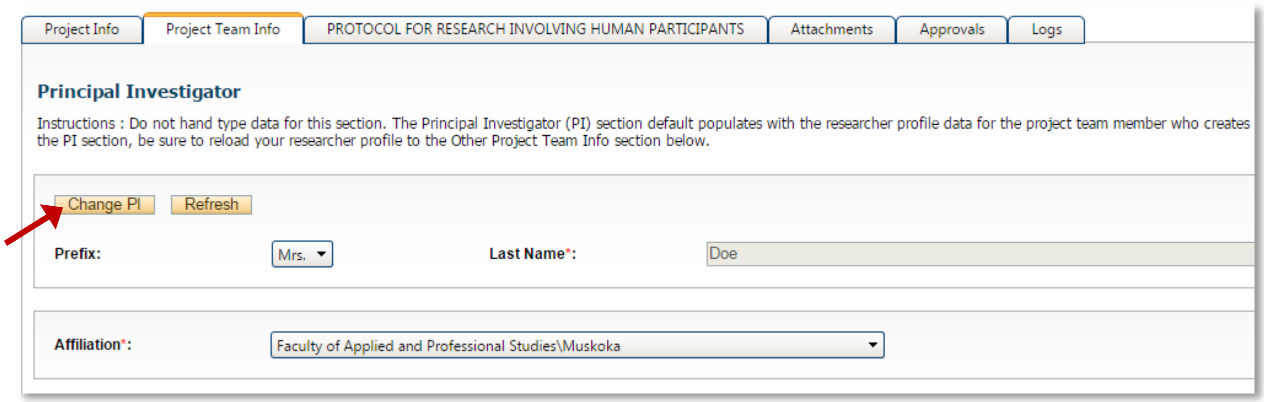






Tab #2: Project Team Info

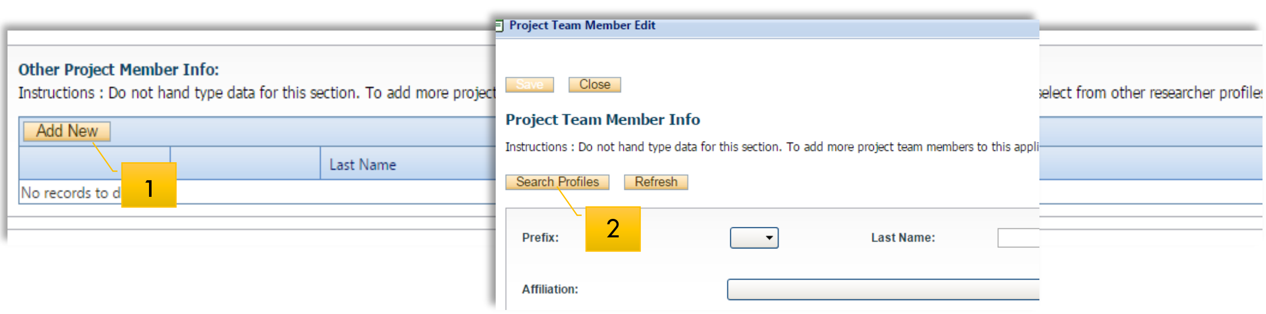
The Project Team Info tab is automatically populated with your information as the Principal Investigator (PI). If you are not the PI, click **Change PI** to select a different researcher.



Adding Project Team Members

To add a team member:

- Scroll down to **Other Project Member Info** and click **Add New**
- Click **Search Profiles** and enter the researcher's first and last names (try using last name only if the name does not come up)
- Click **Select** beside the correct name to add the researcher to your team
- Update the **Role in Project** field if the team member's role is not the default of co-investigator (**<u>Important</u>**: Student applications should always assign their supervisor(s) as team members and select "Faculty Supervisor" role)
- Click **Save** and repeat for each additional team member



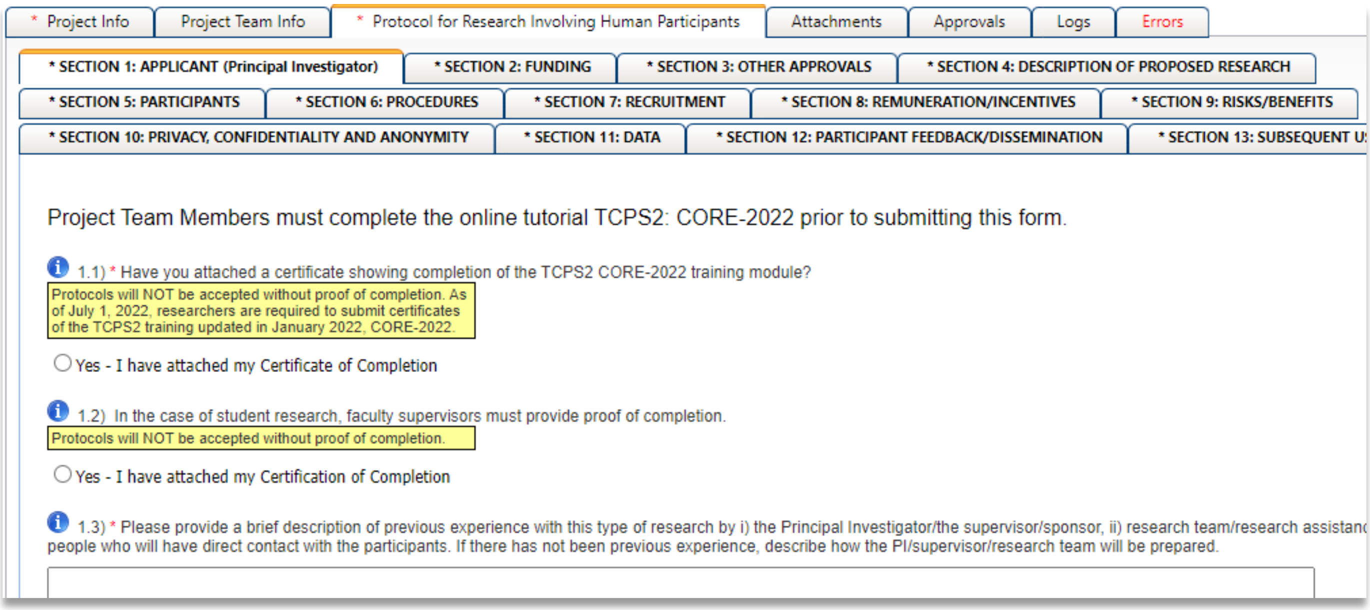
Note: If you are unable to identify the person you are looking for from the investigators' list, email research@nipissingu.ca with the person's full name.

Keep in mind that anyone who will need to have access to the application should be added as team members, but only the PI and the Faculty Supervisor will be copied on all system-generated email correspondence.

<u>Important:</u> Although all team members will have access to view and edit the application, the PI is the only member of the project team who can submit the application once it is ready for review.

Tab #3: Form-Specific Tab

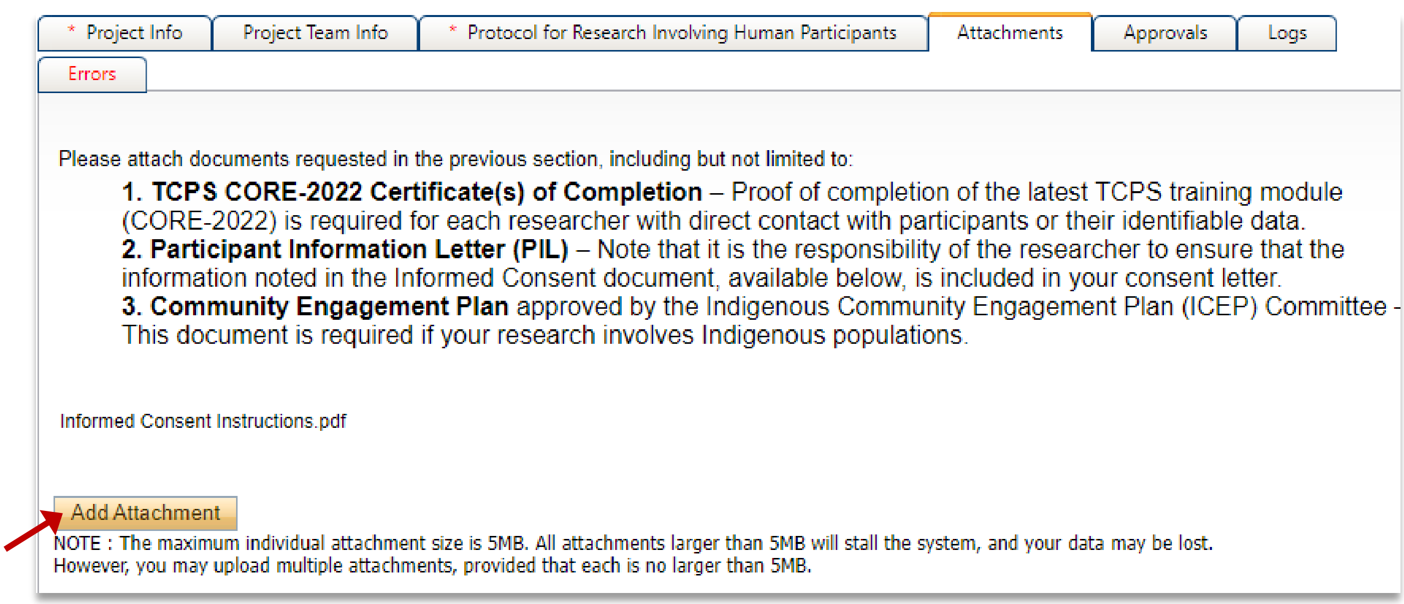
The third tab has the same name as the application form and covers questions about the project/proposal in detail.



All sub-tabs of this Tab must be completed. Note that all fields preceded by a red asterisk (*) must be completed to submit the form.

Tab #4: Attachments Tab

Use the Attachments tab to upload documents requested in the previous tab, such as Participant Information Letters (PILs), questionnaires, surveys, etc. Click **Add Attachment** to select files to upload.



Enter a Description, Version Date, Doc/Agreement Type, and upload the first document. Repeat with any others.

Errors Tab

The Errors tab keeps a log of any required questions that were left unanswered. Once you address all required questions, the Errors tab will disappear.

Submitting the Application

Once you're ready to submit:

- Click the **Submit** button at the top of the screen
- Add a note to the Comments box (if you don't have any comments, use something like "Submitting application")
- Click on one of the **Submit** buttons to submit your application for review

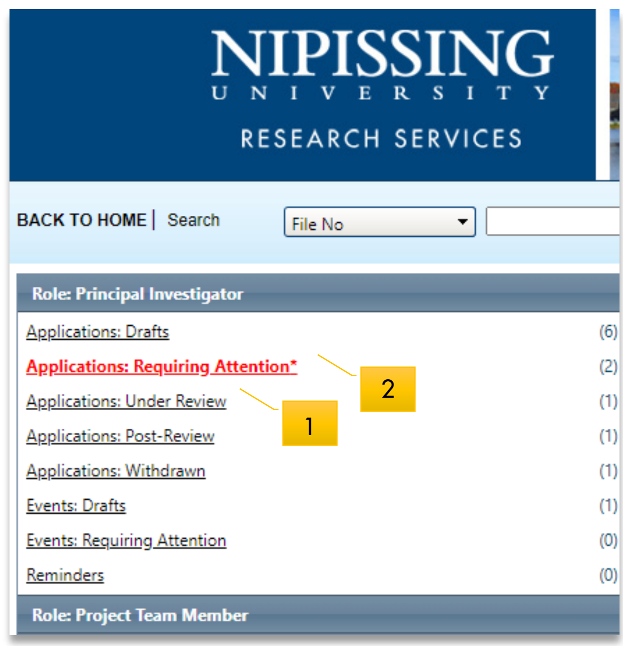
POST-SUBMISSION

Applications Under Review

Once you have submitted the application for review, you will receive an email confirming the receipt of your application. At this stage you cannot edit the application, but you may still view it under **Applications: Under Review** (#1 in screen shot).

Applications Requiring Revisions

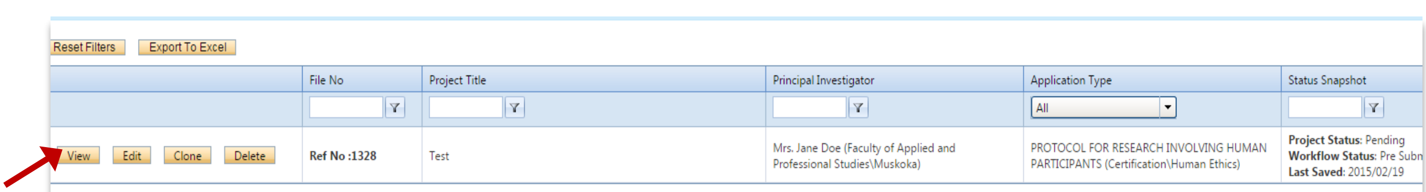
If the reviewer(s) require any changes or clarifications, you will receive an email from romeoadmin@nipissingu.ca noting the areas that require attention. At this stage, you will be able to edit the application by clicking on **Applications: Requiring Attention** (#2 in screen shot to the right).



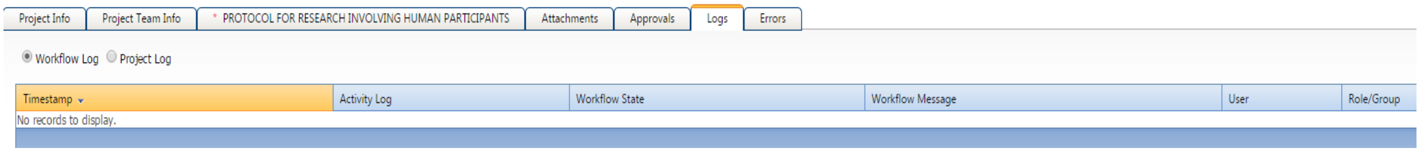
Logs Tab

The **Logs tab** allows the applicant, reviewer(s) and the administrator to track the history of the application and communicate with one another. Blue font is used to indicate the most recent updates.

If you wish to check the status of an application, navigate to the application through one of the quick links in the screen shot above and then click **View** beside the application you want to view.



Select the **Logs** tab and click the "Workflow Log" button to show the state of your application.



The "Workflow Log" tracks and time stamps approval and messages. The "Project Log" tracks and time stamps every action taken on the application.

Approved Applications

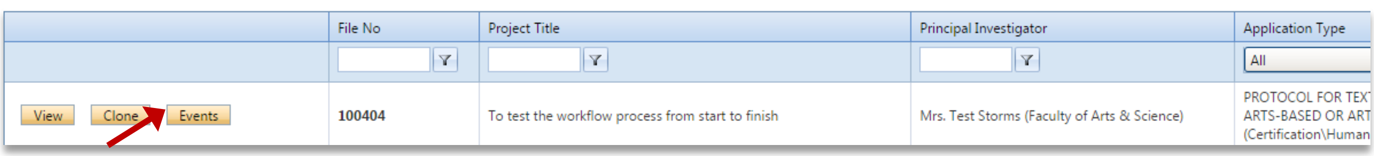
Once the application has been approved, the PI will receive a formal approval letter by email. The application can no longer be modified but is available for viewing under **Applications: Post Review**. If any changes need to be made after this point, a Modification **Event** will need to be submitted. See the section below on Events.

EVENTS

Event forms are designed to capture changes made to an application after it has been approved (e.g., Modifications, Renewals, Final Reports, Serious Adverse Events, and Grant Extension Requests).

To submit an Event:

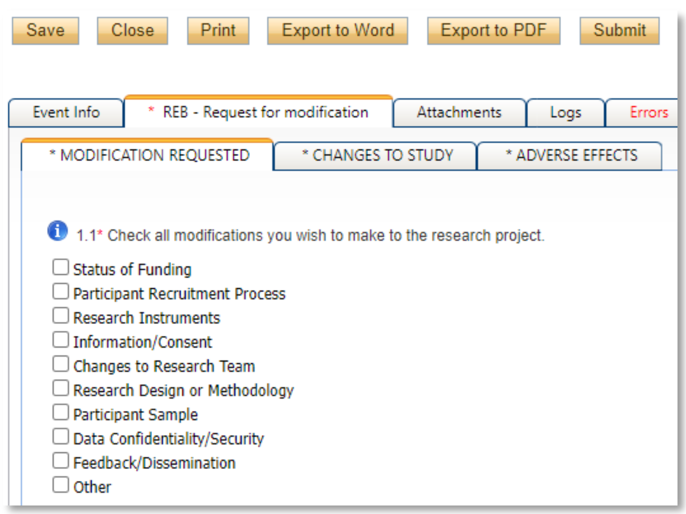
- Select **Applications: Post Review on** your home page
- Click **Events** beside the relevant application
- Select the Event you wish to complete (e.g., Modification, Renewal)



In the Event request form:

- Answer the questions in each of the tabs
- Upload any relevant documents in the Attachments tab
- Check the Errors tab for any required fields that you may have missed
- Click the **Submit** button at the top

Once submitted, you can view the Event by clicking on one of the Event quick links on your home page.



Changes to Project Team Members

If you need to remove or add a project team member, use the Modification request Event form, following the instruction above. Note that team updates are mainly important for ensuring that new members receive notifications regarding the application (or that 'ex-members' no longer receive emails) and have access to view the protocol and submit Events, if needed.

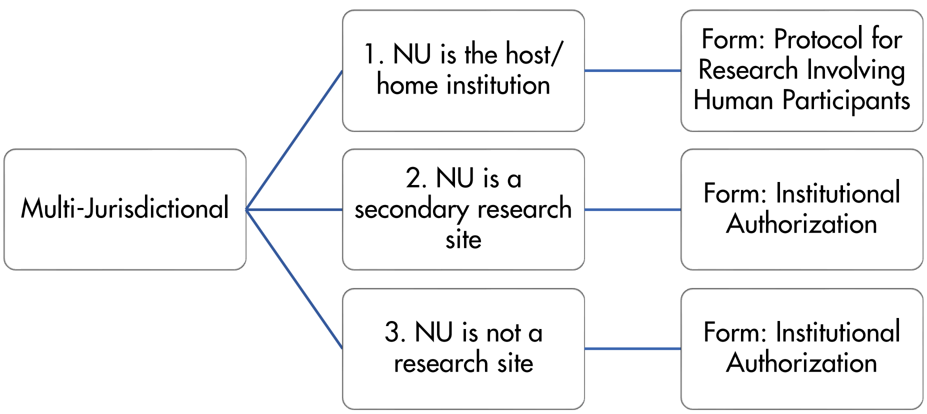
Note: Before submitting the Event, ensure that any new team members have registered in the NU version of Romeo by following the instructions above (page 1). This will allow the Romeo administrator to add the team members promptly upon receiving your request.

SPECIFIC FORMS

Multi-Jurisdictional Projects

According to the TCPS2, NU is "responsible for the ethical acceptability and ethical conduct of research undertaken within its jurisdiction or under its auspices irrespective of where the research is conducted" (Article 8.1). This means that any research projects approved by an external REB but involving NU community members require NUREB approval, as well as any research projects undertaken by NU researchers but conducted outside of NU's jurisdiction.

For multi-jurisdictional projects, an Institutional Authorization form should be used for projects where NU is not considered the home/host institution.



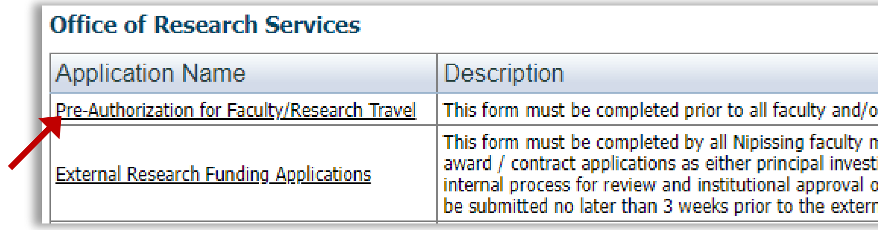
EXTERNAL RESEARCHERS

If you are an external researcher seeking approval to conduct research within NU's jurisdiction, there is a 2-part approval process:

1. Seek institutional authorization from the Provost & VP, Academic and Research's office by submitting the Institutional Support for Research Request form to pvpar@nipissingu.ca.
2. If your request is approved, you may then apply for ethics approval via the **Institutional Approval** form in NU's Romeo. The form asks for basic info about the PI, funding, and other ethical clearances. **Note**: It isn't necessary for each of your team members to register in NU's Romeo so that you can add them to the team. Instead, just include their details in the Project Team tab under "Investigator Comments."

Pre-Authorization for Faculty Travel

On your Romeo home page, click APPLY NEW and select the **Pre-Authorization for Faculty/Research Travel** form under Office of Research Services.

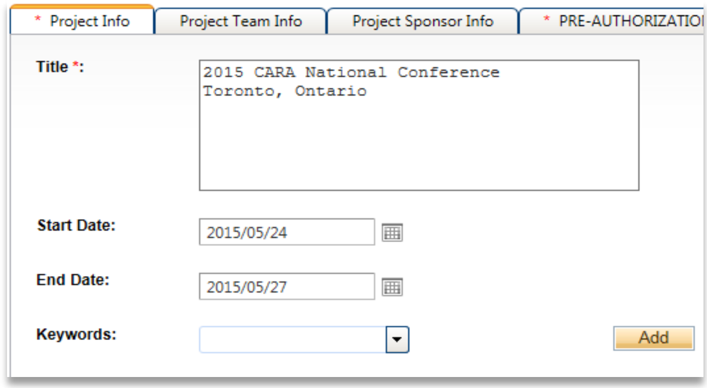


Project Info tab

Fill out this section as if the trip is a stand-alone project.

Title: Conference title or description of the travel

Start & End Dates: Dates of travel (not the dates of a larger research project with which the travel may be associated)



Project Team Info tab

This will auto-fill with your info as PI. No need to add team members, unless you are requesting travel approval for RAs as well.

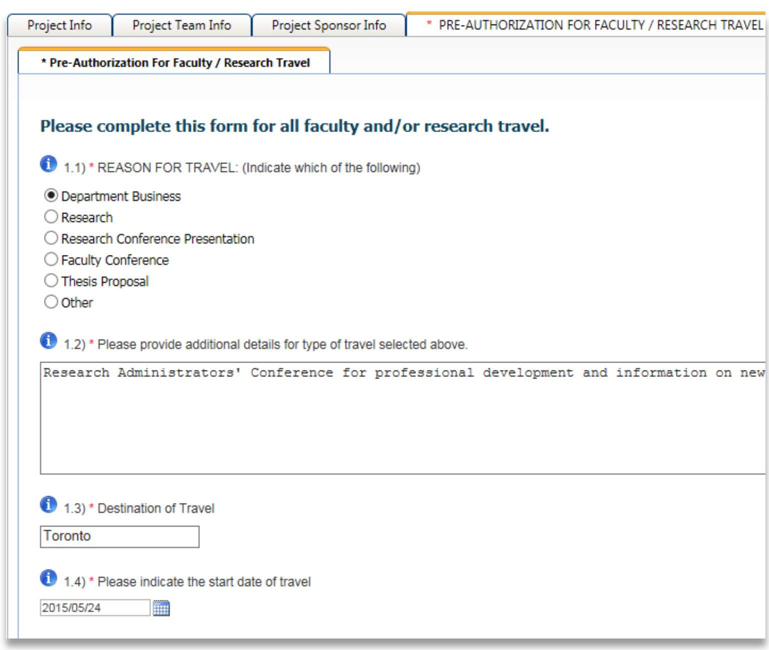
Project Sponsor Info tab

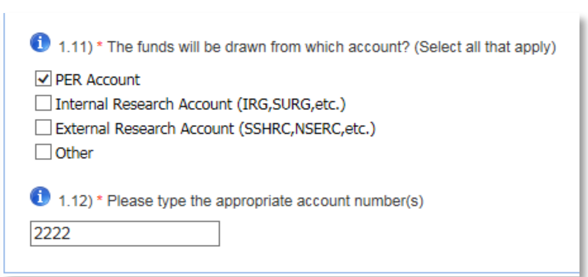
You can skip this tab, since you will need to identify a funding source in the next tab.

Pre-Authorization for Faculty Travel tab

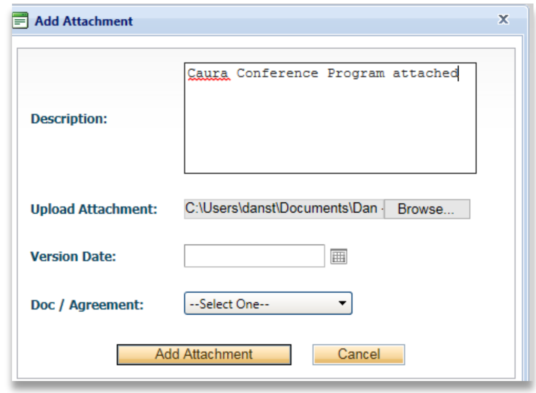
Complete each question on this tab. Keep in mind that the request will be reviewed first by your faculty Dean, then by the Dean of Graduate Studies & Research.

It's essential that you identify the cost centre of the fund you intend to use for the travel. If you're not sure, contact your faculty office (for PER cost centres) or research@ for research acounts.





Attachments tab



All conference travel requests must include the conference program or agenda:

- Click on **Add Attachment**
- Enter a description (title of the program) and browse to add the attachment
- No need to complete the Version Date or the Doc/Agreement field

Errors tab

If the Errors tab appears, check it for required fields that you missed and complete those fields.

Submit the Application

Once you're ready to submit:

- Click the **Submit** button at the top of the screen
- Add a note to the Comments box
- Click **Submit** to submit your application for review

Post-Submission

Changes requested	If the reviewer(s) require any revisions, the application will be returned to you. At this stage, you will be able to edit the application by selecting **Applications: Requiring Attention** and clicking **Edit** beside the application. Click the **Logs tab** to view the reviewer's comments. After making the required changes to the form, click **Resubmit**.
Approved	Once the application has been approved, you will receive a formal approval email from romeoadmin@nipissingu.ca. File this to include with your P-Card expense report in CentreSuite or with your Statement of Expense form. The application can no longer be modified but is available for viewing under **Applications: Post Review**.