

**Office of Research Services  
 ROMEO Researcher Portal Guides**

**How to Submit an Agreement or Amendment for ORS Legal Review (No Account Opening)**

This application is used for the types of agreements that do not result in a new account opening, plus accompanying or follow up amendments. The agreement/amendment is related to an existing project in the ROMEO system. To get started, click **Applications: Post-Review** from the ROMEO homepage.

Role: Principal Investigator	
<a href="#">Applications: Drafts</a>	(0)
<a href="#">Applications: Requiring Attention</a>	(0)
<a href="#">Applications: Under Review</a>	(0)
<a href="#">Applications: Post-Review</a>	(0)
<a href="#">Applications: Withdrawn</a>	(0)

Locate the relevant project and click the Events button.

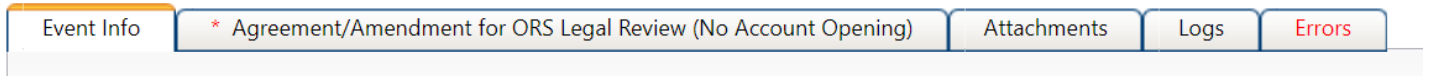
	File No	Project Title	Principal Investigator	Application Type
	<input type="text"/>	<input type="text"/>	<input type="text"/>	All
<a href="#">View</a> <a href="#">Events</a> <a href="#">Latest Workflow</a>	1035984	Test	Jaq-Lin Larder (VP, Research and Innovation (Dalhousie)\Office of Research Services)	(Awards\Awards)

Select the Agreement/Amendment for ORS Legal Review form.

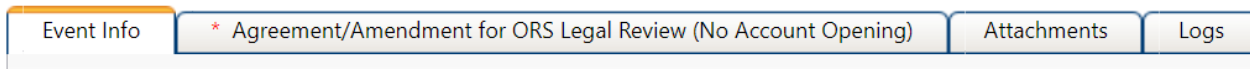
**Create New Event**

Event Form Name	Description
<a href="#">Agreement/Amendment for ORS Legal Review (No Account Opening)</a>	Application for and data transf agreements.
<a href="#">Grant/Contract Amendment Request</a>	Request to am

The form includes the **Event Info** tab where the PI can leave notes for the Administrator (optional), the **Agreement/Amendment for ORS Legal Review** tab (mandatory), the **Attachments** tab (uploading additional documentation) and the **Logs** tab (tracking edits made to the file overtime). The **Errors** tab displays any mandatory questions that need to be answered before the system will let the PI or project team member submit the form.



After responding to the questions under the Agreement/Amendment for ORS Legal Review tab, and uploading any required documents to the Attachments tab, click the Submit button.



Upon submission, the request will move from **Events: Drafts** to **Events: Under Review**. At this point, no edits can be made, and the file will be read-only. If the PI needs to make revisions, contact the relevant Administrator and they will enable editing mode.

**Create New Event**

Event Form Name	Description
<a href="#">Agreement/Amendment for ORS Legal Review (No Account Opening)</a>	Application for agreements and amendments to be and data transfer, collaboration or research agreement agreements.
<a href="#">Grant/Contract Amendment Request</a>	Request to amend an active research project (e.g. no
<a href="#">Outbound Transfer of Funds Request/Amendment</a>	Outgoing transfers from Dalhousie University to and through this form.
<a href="#">Research involving Indigenous communities: submission of documentation or request for partial release of funds</a>	Please use this ROMEO event form to submit docum request for a partial release of funds to support earl

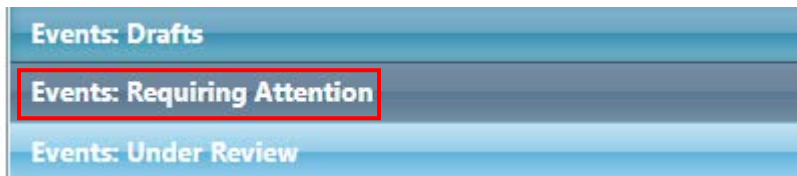
**File No: 1039454**

Principal Investigator: Jaq-Lin Larder  
Project Title: test

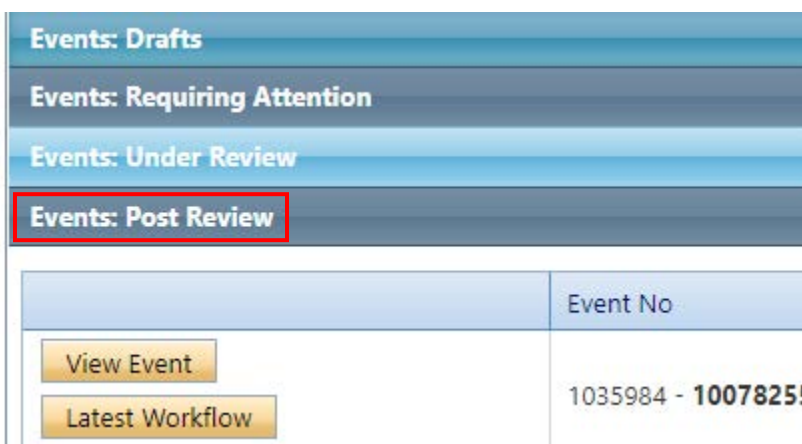


<b>Events: Drafts</b>		
<b>Events: Requiring Attention</b>		
<b>Events: Under Review</b>		
	Event No	Event Category
<a href="#">View Event</a> <a href="#">Latest Workflow</a>	1039454 - <b>10099388</b>	Related Agreement Legal Review (No

If the Administrator returns the form for revisions, the PI and project team members will receive an automatic email notification with instructions. The form will appear under **Events: Requiring Attention**, which can also be accessed directly from the homepage.



If the Administrator approves the request, they will notify the PI. The form will move from **Events: Under Review** to **Events: Post-Review**.



For questions about your application, please contact [orslegal@dal.ca](mailto:orslegal@dal.ca).

For technical assistance with the portal, please contact [researcher.portal@dal.ca](mailto:researcher.portal@dal.ca).