

Office of Research Services ROMEO Researcher Portal Guides

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

The purpose of this form is to submit an agreement to be reviewed/drafted by ORS Legal. The agreement is not related to a specific project, but rather is a stand-alone agreement in support of general research activities.

Login to the portal through the appropriate link.

1. [Internal User \(Dalhousie NetID\)](#)
2. [External User](#)

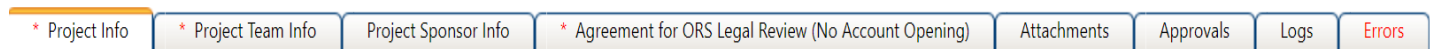
On the right side of the homepage, click Apply New.

APPLY NEW | News | Useful Links

Under **Dalhousie – Awards and Clinical Trials**, select the application name.

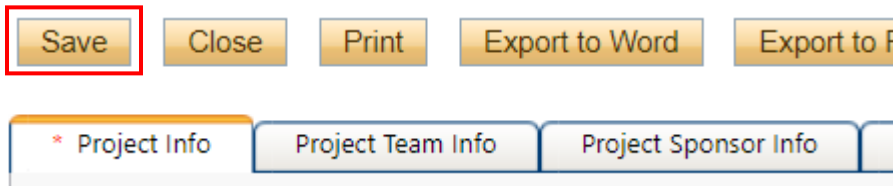
[Agreement for ORS Legal Review \(No Account Opening\)](#)

The form includes a series of tabs at the top. The **Errors** tab on the far right will show a list of mandatory questions that need to be answered prior to submitting the form.



Orange buttons enable functional tasks like saving, printing or submitting the file for review.

The portal does not have auto-save feature, and it is recommended to click Save at regular intervals.



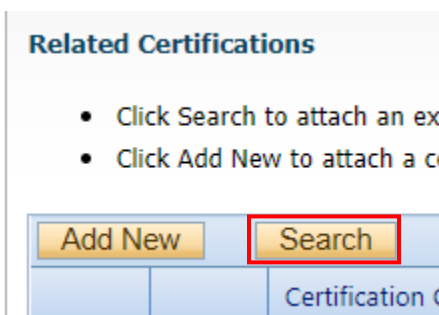
Basic details are captured under the **Project Info** tab, including project title, start & end date (these dates can be estimated if not finalized yet), and keywords relevant to the project.

A screenshot of a web form with four tabs: '* Project Info', 'Project Team Info', 'Project Sponsor Info', and a partially visible fourth tab. The '* Project Info' tab is highlighted with a red border. Below the tabs, the form contains the following fields:

- Title *:** A large empty text input field.
- Start Date:** A date input field with a calendar icon to its right.
- End Date:** A date input field with a calendar icon to its right.
- Keywords:** A text input field with a dropdown arrow on the right side.

Farther down the page are a series of questions where a “yes” response can be given where applicable.

The PI can also link a Certificate file to the application. Clicking Search will bring up a database of their Human Ethics and Animal Care protocols in the system.



Investigator details are automatically populated under the **Project Team Info** tab. By default, whoever starts the application is listed as the Principal Investigator. If the person is not actually the PI, they can still complete the form, but the PI must be the one to click Submit, as the equivalent of their electronic signature. [Click here for instructions on how to change the PI.](#)

If the PI is external, the Dalhousie researcher must remain listed as the PI in ROMEO, since the application is being submitted for internal approval.

The screenshot shows the 'Project Team Info' tab selected in a navigation bar. Below the navigation bar, the 'Principal Investigator' section is visible. It includes instructions: 'Do not hand type data for this section. The Principal Investigator (PI) section default populates with the researcher profile. Change PI button to search for and select an alternate researcher profile. If you load an alternate researcher profile to the PI section, be'. The form contains several fields: 'Change PI' and 'Refresh' buttons, a 'Prefix' dropdown menu, a 'Last Name*' text input field containing 'Larder', an 'Affiliation*' dropdown menu with 'VP, Research and Innovation (Dalhousie)\Office of Research Services' selected, a 'Position' dropdown menu with 'Research Staff' selected, and an 'Institution' dropdown menu with 'Dalhousie University' selected.

If the PI has multiple appointments, click the Affiliation drop-down box to select the unit to which the application should be routed.

This close-up shows the 'Affiliation*' dropdown menu with the selected option 'VP, Research and Innovation (Dalhousie)\Office of Research'.

To add project team members, scroll to the bottom of the Project Team Info tab and click Add New.

The screenshot shows the 'Other Project Member Info' section with the instruction 'Do not hand type data for this section'. At the bottom of this section, there is an 'Add New' button highlighted with a red box, next to a question mark icon.

Click Search Profiles.

The screenshot shows the 'Project Team Member' section with the instruction 'Do not hand type data for this section'. At the bottom of this section, there is a 'Search Profiles' button highlighted with a red box.

Search by first or last name.

Start With Any part

Last Name:

First Name:

Click the Select button.

Options	Last Name
	<input type="text"/>
<input type="button" value="Select"/>	Training

Their profile details will auto-populate. The drop-down list can be used to select their role in the project.

Click the Save button.

Project Team Men

Tip: Most of the existing profiles will be Dalhousie affiliates. If the PI wishes to add someone who is not on the list, two options are available. A request could be sent to researcher.portal@dal.ca to create a profile OR the team member's name, institution and project role can be typed into the Comments box. The second option is preferable if their names are being added for reference only, and it's not necessary for them to have access to the file in ROME0.

Other Project Member Info:
Do not hand type data for this section. To add m

Details on the collaborating institution can be captured under the **Project Sponsor Info** tab.

Click Add New.

Project Info Project Team Info **Project Sponsor Info**

Click Add New to add funder and per fiscal year budget details for this

Add New

Investigator

Click Agency.

Sponsor Info.

Agency:

Program:

Search for Agency (name or abbreviation).

Start With Any part

Agency Name:

Abbreviation:

Note: If the agency is not listed, select the “Agency Not Listed” option. Type the agency name in the Comments box.

Options	Name
	<input type="text"/> <input type="button" value="Y"/>

 ****Agency Not Listed****

If the agency appears, click the Select button.

<input type="button" value="Select"/>	Addgene
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Select the program from the drop-down list. Names are arranged in alphabetical order.

Agency: Addgene Agency

Program: **Program Not Listed**

Investigator: **Program Not Listed**

Competition Date: Material Transfer Agreement

If applicable, enter the Competition Date (application deadline). The start & end dates can be estimated or finalized.

Competition Date: 2022/11/01

Start Date: 2023/04/01

End Date: 2025/03/31

Click the Save button.

Sponsor Info

Save Close

Complete all fields an

The **Agreement for ORS Legal Review** tab will produce a number of sub-tabs, with questions related to the project.

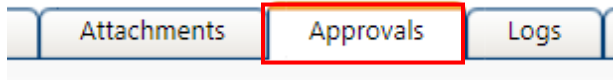
* Project Info * Project Team Info Project Sponsor Info * Agreement for ORS Legal Review (No Account Opening)

* Instructions (Please Read First) * Agreement for ORS Legal Review (No Account Opening) * Research Accountability

Upload relevant documentation to the **Attachments** tab.

to Account Opening) Attachments Approvals

The **Approvals** tab shows the pre-programmed workflow. Most applications are approved by the department first and then the faculty, before reaching the Office of Research Services.



The bottom of the Approvals tab will display a list of signatories other than the department and faculty. The questions under the **Agreement for ORS Legal Review** tab will provide guidance as to whether additional approvals are needed.

Other Approvals
Your institution may require that you obtain additional approval

Active	Department
<input type="checkbox"/>	DMNB signature required
<input type="checkbox"/>	IWK signature required

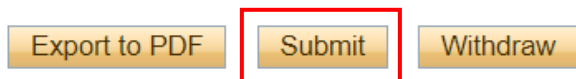
The **Logs** tab will automatically track changes to the file made overtime, as well as messages shared between signing authorities, researchers and administrators.



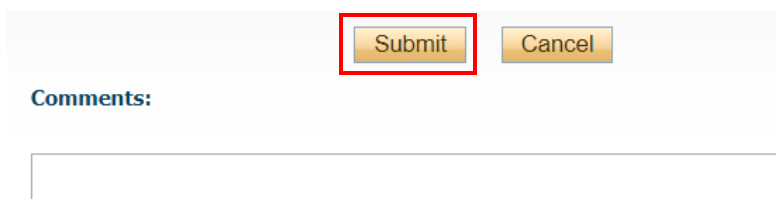
Application Workflow Log Application Log

Timestamp	Activity Log	Workflow State	Workflow Message	User
No records to display.				

When the application is ready to submit, click the Submit button. **Note:** Only the Principal Investigator can see the Submit button, since it's the equivalent of their electronic signature.



A pop-up box will appear. Add any comments to share with the signing authorities and/or office administrators, then click Submit again.



Comments:

Upon submission, the file will move from **Applications: Drafts** to **Applications: Under Review**. At this point, no edits can be made, and the file will be read-only.



[Applications: Drafts](#)

[Applications: Requiring Attention](#)

[Applications: Under Review](#)

If the PI needs to make revisions, the Status Snapshot will display where the application is currently sitting. The signing authority or ORS Administrator can return the application for revision.

Status Snapshot

Project Status: Pending
Workflow Status: Department Signing Authority Review

Project Status: Pending
Workflow Status: ORS Review

If revisions are required, the PI and project team members will receive an automatic email notification. Login to the portal and click **Applications: Requiring Attention**.

Role: Principal Investigator

[Applications: Drafts](#)

[Applications: Requiring Attention*](#)

[Applications: Under Review](#)

Click Latest Workflow next to the project.

[View](#) [Edit](#) [Clone](#) **Ref No : 1558**

[Latest Workflow](#)

View the message from the signing authority or ORS Administrator.

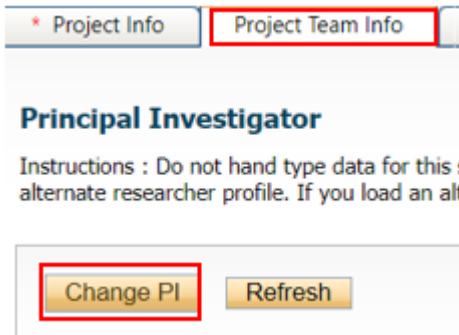
Workflow State	Workflow Message
ORS Review -> Pending Info by ORS	Please make revisions to this table.
Pre-Submission -> ORS Review	test [Action: Submit]

Make the required changes. As the final step, the PI clicks the Re-Submit button.

[Export to PDF](#) **[Re-Submit](#)** [Withdraw](#)

How to Change the Principal Investigator in the System

At some point before completing the application, click the Change PI button.



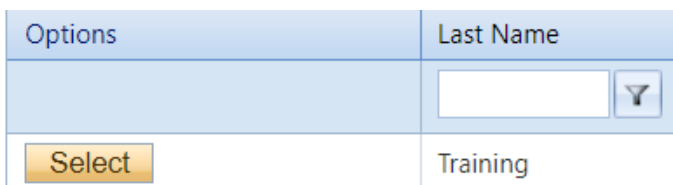
The screenshot shows a web interface with two tabs: "Project Info" and "Project Team Info". The "Project Team Info" tab is active and highlighted with a red border. Below the tabs, the section is titled "Principal Investigator". Underneath the title, there is a line of text: "Instructions : Do not hand type data for this s alternate researcher profile. If you load an alt". At the bottom of this section, there are two buttons: "Change PI" and "Refresh". The "Change PI" button is highlighted with a red border.

Search for PI's name in the white boxes. If nothing appears, try the first or last name separately (name might include hyphens, initials, etc.)



The search form consists of two radio buttons at the top: "Start With" (unselected) and "Any part" (selected). Below the radio buttons are two input fields: "Last Name:" and "First Name:". At the bottom of the form are two buttons: "Search" and "Reset".

Select the PI's name.



Options	Last Name
	<input type="text"/> ▼
<input type="button" value="Select"/>	Training

In order to save their work, and still have access to the file, the delegate needs to add themselves back in as a Project Team Member (scroll to the bottom of the Project Team Info tab).

Click Add New.

Other Project Member Info:
Do not hand type data for this section. To add more project team members to this applicatio

Add New	?
	Last Name

Click Search Profiles to look up and select their name.

Project Team Member Info

Do not hand type data for this section. To add more project team m

Search Profiles	Refresh	?
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Save and close out of the file. When the application is ready to be submitted, inform the PI so that they can login to ROMEO and click the Submit button.