

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

How to Submit a New Protocol Form

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.



Select the protocol form.

Dalhousie - Animal Care (ACUC, UCLA)

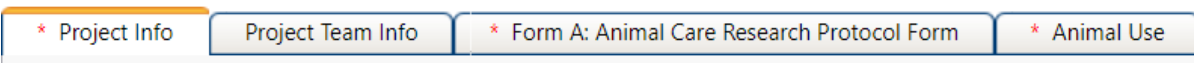
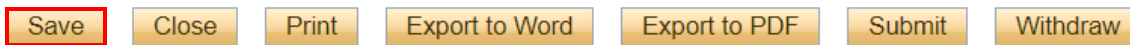
Application Name	Desc
Form A: Animal Care Research Protocol Form	This ap research Applica
Form C: Application to use invertebrates, tissues obtained at necropsy or obtained from a slaughterhouse	This ap Animal experin inverte
Teaching Protocol Form AC	Agriculi teachin Review
Dalhousie Permanent Stock Protocol Form	Permar source: CCAC r Reduce

Each 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 protocol title, start & end date (these dates can be estimated if not finalized yet), and keywords relevant to the protocol.

The 'Project Info' tab is selected and highlighted with a red border. Below the tabs, there are four main input fields: 'Title *:' with a large text area; 'Start Date:' with a text box and a calendar icon; 'End Date:' with a text box and a calendar icon; and 'Keywords:' with a dropdown menu. At the bottom right of the form area is a 'Clear' button.

At the bottom of the page, the PI can also link an Awards file to the protocol. Clicking Search will bring up a database of their grants, contracts, and internal awards in the ROME system.

A 'Search' button is highlighted with a red border. Below it is a table with one column labeled 'Award File No'. Below the table, the text 'No records to display.' is shown.

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 protocol 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.](#)

The screenshot shows a navigation bar with five tabs: '* Project Info', 'Project Team Info' (highlighted with a red border), '* Form A: Animal Care Research Protocol Form', '* Animal Use', and 'Attach'. Below the tabs is the 'Principal Investigator' section. It contains instructions: 'Instructions : Do not hand type data for this section. The Principal Investigator (PI) section default populates with the research alternate researcher profile. If you load an alternate researcher profile to the PI section, be sure to reload your researcher prof'. The form fields are: 'Change PI' and 'Refresh' buttons; 'Prefix:' dropdown menu; 'Last Name*:' text input with 'Larder' entered; 'Affiliation*:' dropdown menu with 'VP, Research (Dalhousie)\Office of Research Services' selected; 'Position:' dropdown menu with 'Research Staff' selected; and 'Institution:' dropdown menu with 'Dalhousie University' selected.

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 se'. At the bottom, there is a blue bar containing an 'Add New' button (highlighted with a red border) and a question mark icon.

Click Search Profiles.

The screenshot shows the 'Project Team Member' section with the instruction 'Do not hand type data for'. At the bottom, there is a blue bar containing a 'Search Profiles' button (highlighted with a red border).

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 ROMEO.

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

The custom form tab will produce a number of sub-tabs, with questions related to the protocol.

The screenshot shows a horizontal row of tabs. From left to right, the tabs are: '* Project Info', 'Project Team Info', '* Form A: Animal Care Research Protocol Form' (highlighted with a red border), '* Animal Use', 'Attachments', and 'Approval'. Below this row is another row of sub-tabs: '* Administrative Information', '* Emergency Contacts', '* Project Objectives, Potential Benefits, & Project Description', and '* The Three R's'. A third row contains 'Euthanasia', '* Checklist', and '* Declaration'.

The **Animal Use** tab is where the Purpose of Animal Use and Category of Invasiveness can be selected.

At the bottom, under Animal Use Summary, click Add New to enter further details on the species.

The screenshot shows the 'Animal Use' tab selected in the navigation bar. The main content area is titled 'Animal Use Info' and contains several form fields: 'Purpose of Animal Use:(PAU) *' with a dropdown menu showing '-Select-'; 'Category of Invasiveness:(CI) *' with a dropdown menu showing '-Select-'; 'Classification' with a dropdown menu showing '-Select-'; and 'Protocol Description:' with a large text area. Below this is the 'Animal Use Summary:' section, which contains a blue bar with an 'Add New' button highlighted by a red border.



The screenshot shows a form for entering species details. At the top are 'Save' and 'Close' buttons. The form fields are: 'Species :' with a dropdown menu showing 'bats'; 'Species Keywords :' with a dropdown menu showing 'altered er'; 'Strain :', 'Weight :', 'Gender :', and 'Source :', each with an empty text input field.

The **Attachments** tab will show a list of documents that might be applicable to the study (the custom form tab will provide guidance on which documents are needed). Attachments can be downloaded, completed, then uploaded to the file via the Add Attachment button.

* Project Info | Project Team Info | * Form A: Animal Care Research Protocol Form | * Animal Use | **Attachments**

Refer to Checklist tab for attachment requirements applicable to your study.

- Attachment A.doc
- Attachment B.doc
- Attachment C.doc
- Attachment D.doc
- Attachment E.doc
- Attachment F.doc
- Attachment G.doc
- Attachment H.doc
- Attachment I.doc
- Attachment J.doc
- Attachment K.docx
- Research Personnel Training.docx
- Assumption of risk ON CAMPUS.docx
- Assumption of risk OFF CAMPUS.docx

Add Attachment

The **Approvals** tab shows the pre-programmed workflow. Animal Care protocols are reviewed by the UCLA or ACUC (i.e. the primary “Office” in ROMEIO terminology).

* Project Info | Project Team Info | * Form A: Animal Care Research Protocol Form | * Animal Use | Attachments | **Approvals**

Approvals
This application is pre-programmed to route to the following signing authority levels

Role	Active
Division Signing Authority	<input type="checkbox"/>
Department Signing Authority	<input type="checkbox"/>
Faculty Signing Authority	<input type="checkbox"/>
Office of Research Services/Office of Research Ethics	<input checked="" type="checkbox"/>

The **Logs** tab will automatically track changes to the file made overtime, as well as messages shared between Administrators and the research team.

* Project Info | Project Team Info | * Form A: Animal Care Research Protocol Form | * Animal Use | Attachments | Approvals | **Logs**

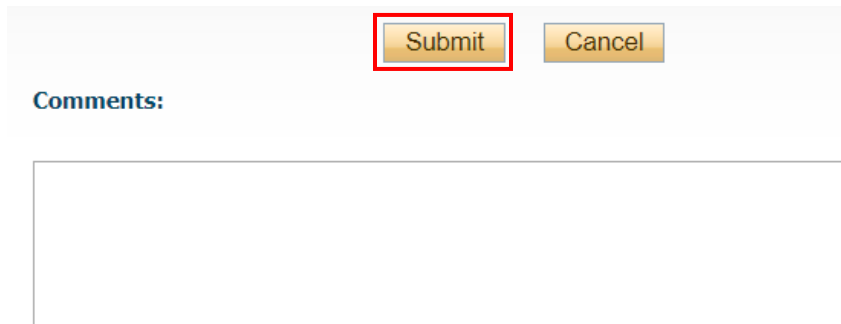
Application Workflow Log Application Log Shared Communications

Timestamp	Activity Log	Workflow State	Workflow Message
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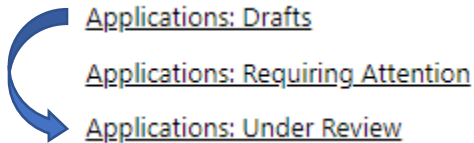
When the protocol has been completed, click the Submit button. **Note:** Only the Principal Investigator can see the Submit button, since it's the equivalent of their electronic signature.



A pop-up box will appear. Add any comments to share with the Animal Care Administrator, then click Submit again.



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

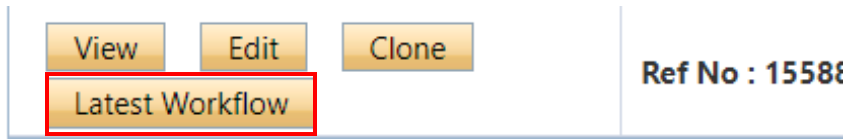


If revisions are required, the PI and project team members will receive an automatic email notification. Login to the portal and click **Applications: Requiring Attention**.

Role: Principal Investigator

[Applications: Drafts](#)
[Applications: Requiring Attention*](#)
[Applications: Under Review](#)

Click Latest Workflow next to the protocol.

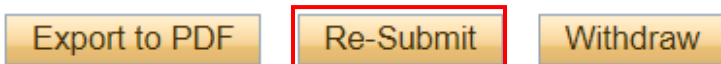


A horizontal panel containing three buttons: 'View', 'Edit', and 'Clone'. Below these buttons is a button labeled 'Latest Workflow', which is highlighted with a red rectangular border. To the right of the buttons, the text 'Ref No : 15588' is displayed.

View the message from the Administrator.

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

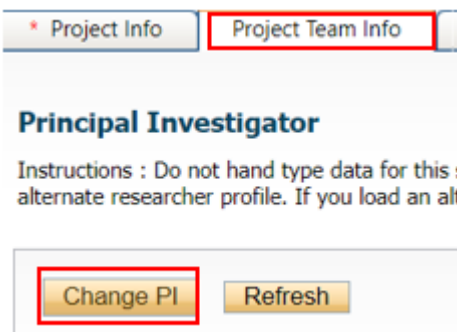
Make the required changes. As the final step, the PI clicks the Re-Submit button.



A row of three buttons: 'Export to PDF', 'Re-Submit', and 'Withdraw'. The 'Re-Submit' button is highlighted with a red rectangular border.

How to Change the Principal Investigator in the System

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



A tabbed interface with two tabs: 'Project Info' and 'Project Team Info'. The 'Project Team Info' tab is selected and highlighted with a red rectangular border. Below the tabs, the heading 'Principal Investigator' is displayed. Underneath, there is a line of instructions: 'Instructions : Do not hand type data for this s alternate researcher profile. If you load an alt'. At the bottom, there are two buttons: 'Change PI' and 'Refresh'. The 'Change PI' button is highlighted with a red rectangular 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.)

Start With Any part

Last Name:

First Name:

Select the PI's name.

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

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

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.