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.

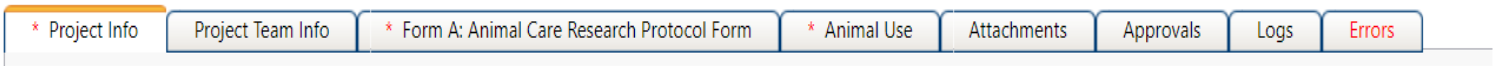
Select the protocol form.

Dalhousie - Animal Care (ACUC, UCLA)

Application Name	Desc
Form A: Animal Care Research Protocol Form	This ap researc 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	Agricul teachin Review
Dalhousie Permanent Stock Protocol Form	Permar sources CCAC r Reduce

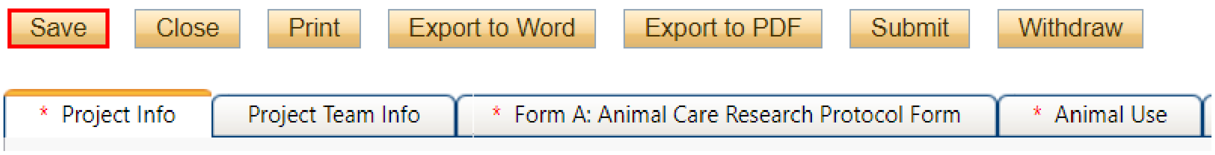
December 2022

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.

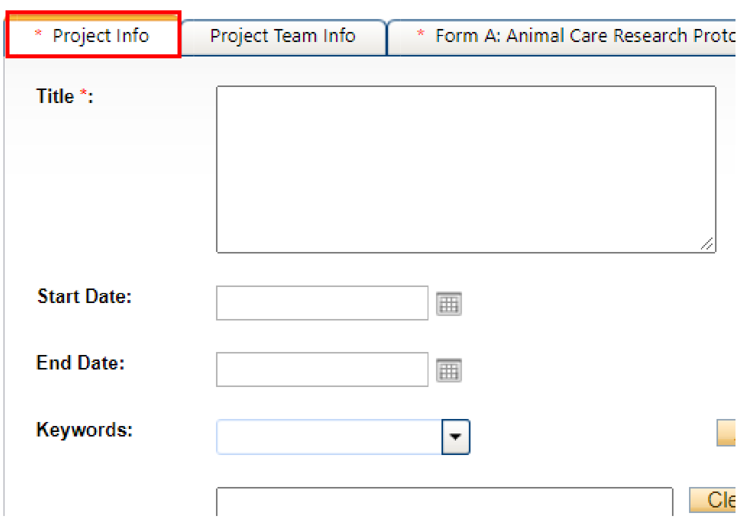


Orange buttons enable functional tasks like saving, printing or submitting the file for review.

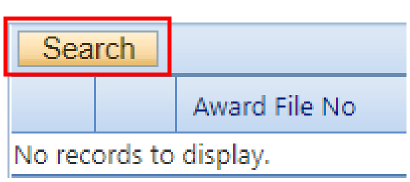
The portal does not have auto-save feature, and it is recommended to click Save at regular intervals.



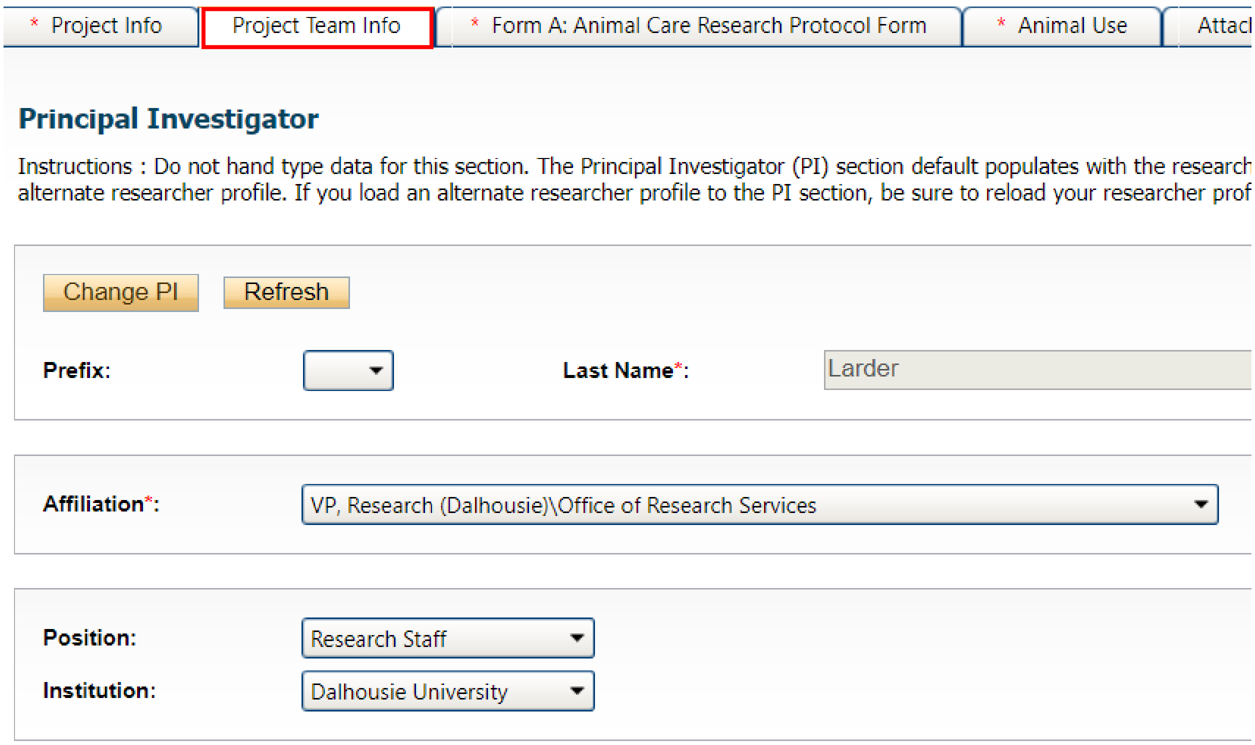
Basic details are captured under the **Project Info** tab, including protocol title, start & end date (these dates can be estimated if not finalized yet), and keywords relevant to the protocol.



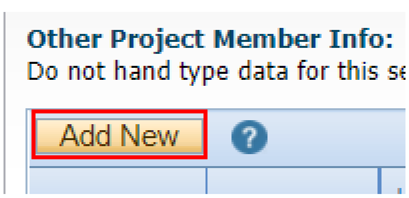
At the bottom of the page, the PI can also link an Awards file to the protocol. Clicking Search will bring up a database of their grants, contracts, and internal awards in the ROMEO system.



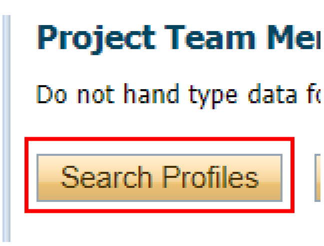
Investigator details are automatically populated under the **Project Team Info** tab. By default, whoever starts the application is listed as the Principal Investigator. If the person is not actually the PI, they can still complete the protocol form, but the PI must be the one to click Submit, as the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



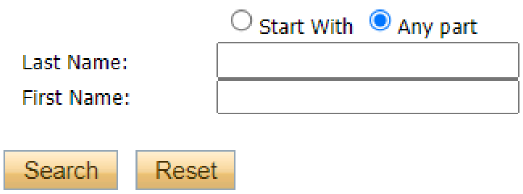
To add project team members, scroll to the bottom of the Project Team Info tab and click Add New.



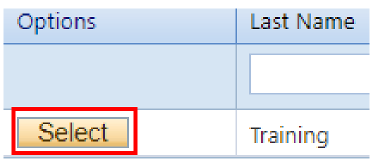
Click Search Profiles.



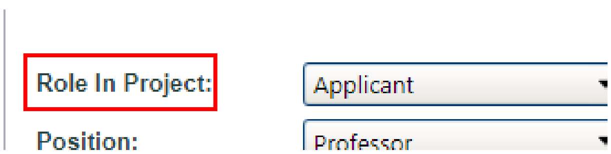
Search by first or last name.



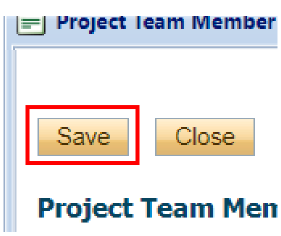
Click the Select button.



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

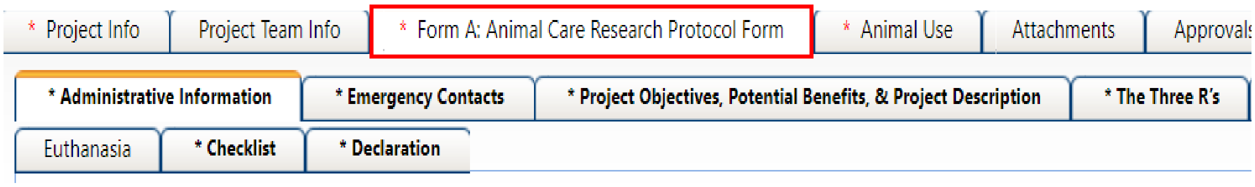


Click the Save button.



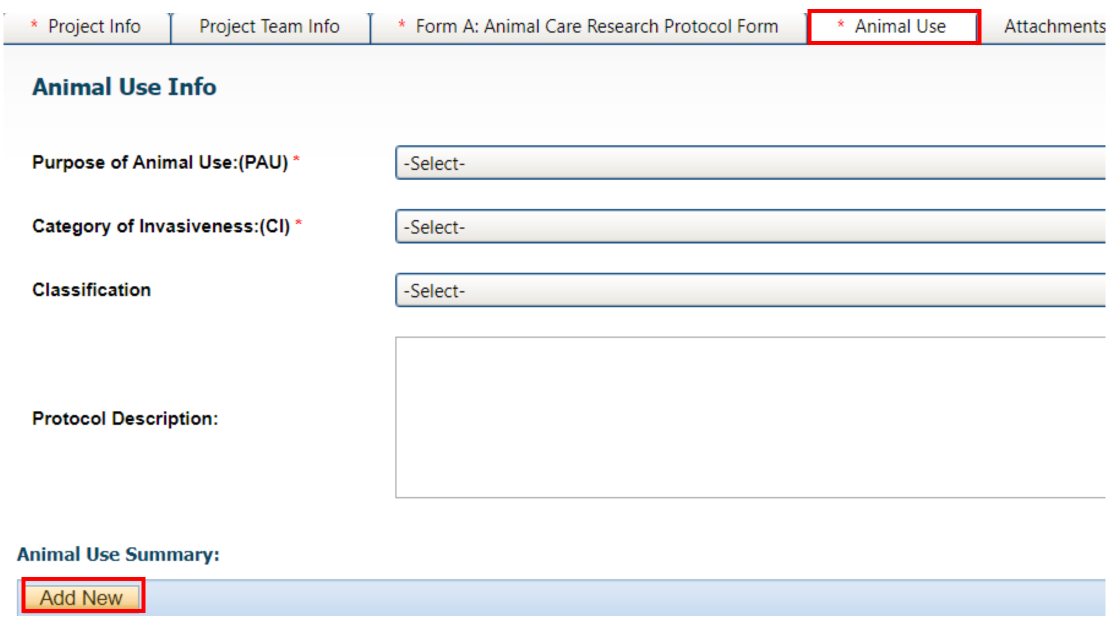
Tip: Most of the existing profiles will be Dalhousie affiliates. If the PI wishes to add someone who is not on the list, two options are available. A request could be sent to researcher.portal@dal.ca to create a profile OR the team member's name, institution and project role can be typed into the Comments 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.

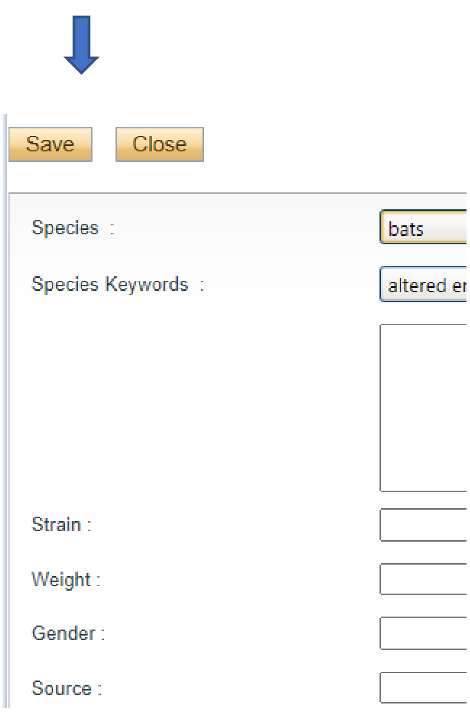
The custom form tab will produce a number of sub-tabs, with questions related to the protocol.



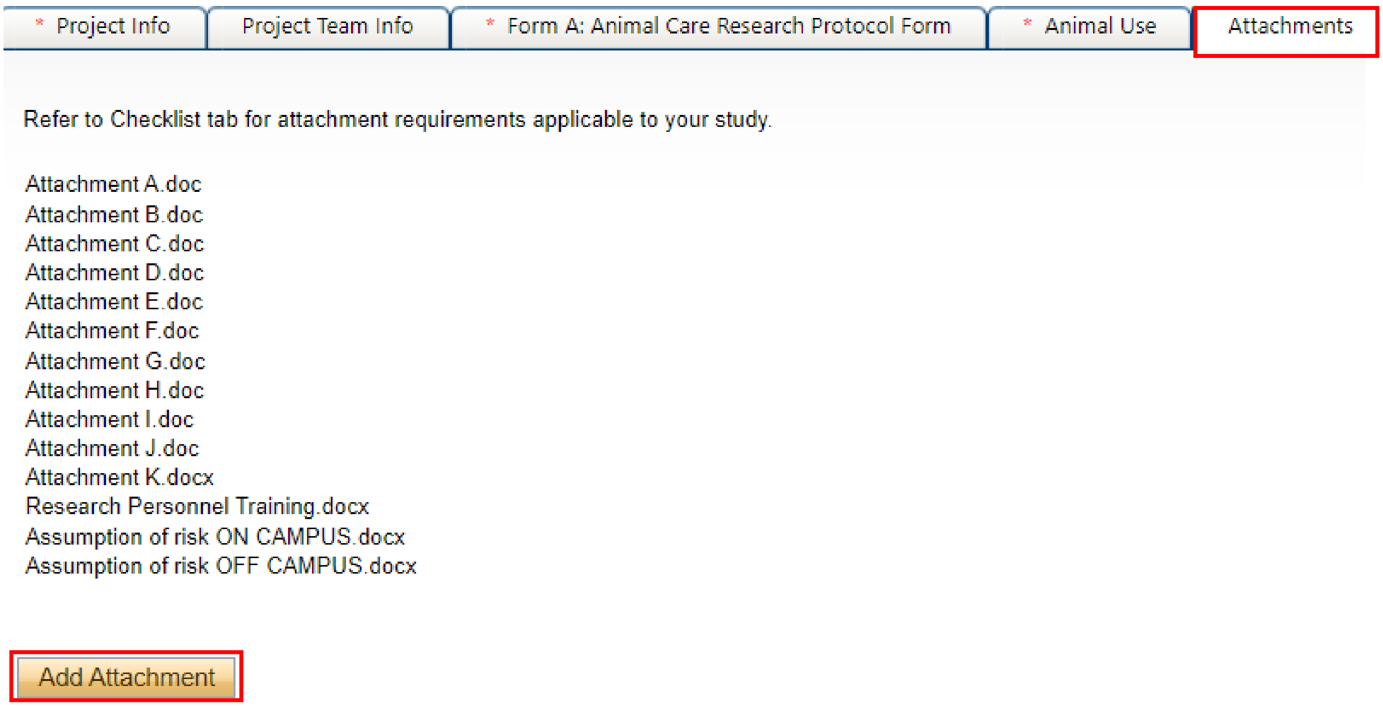
The **Animal Use** tab is where the Purpose of Animal Use and Category of Invasiveness can be selected.

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

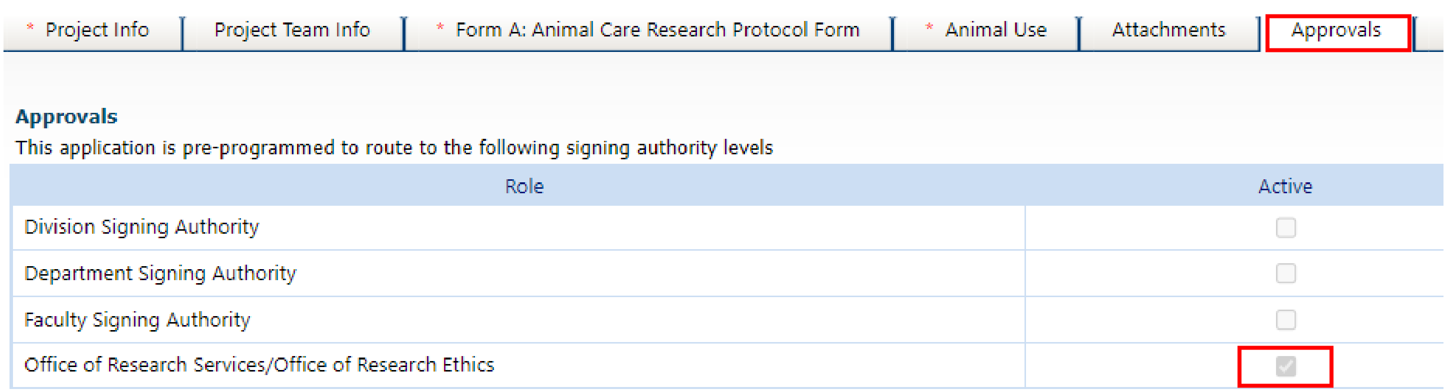




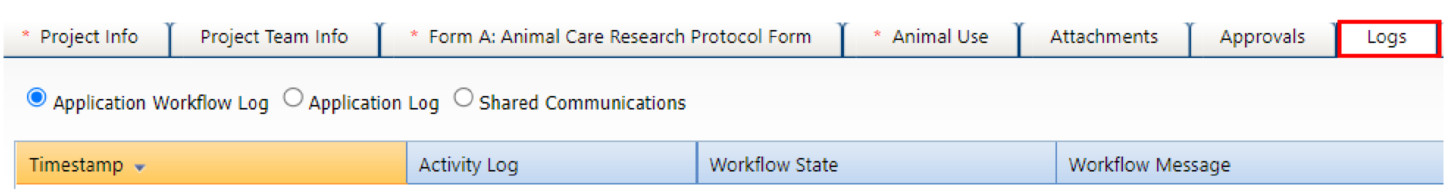
The **Attachments** tab will show a list of documents that might be applicable to the study (the custom form tab will provide guidance on which documents are needed). Attachments can be downloaded, completed, then uploaded to the file via the Add Attachment button.



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

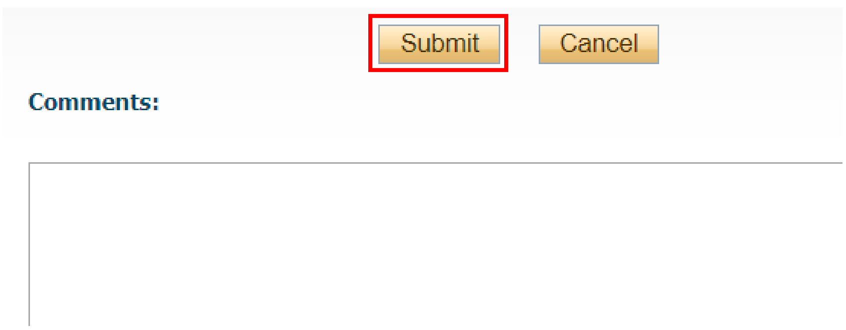


The **Logs** tab will automatically track changes to the file made overtime, as well as messages shared between Administrators and the research team.

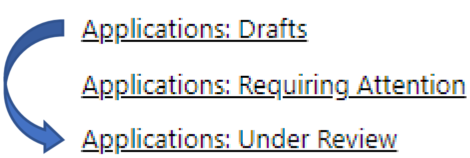


When the protocol has been completed, click the Submit button. **Note**: Only the Principal Investigator can see the Submit button, since it's the equivalent of their electronic signature.

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

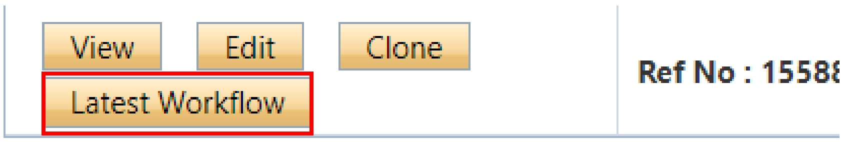


Upon submission, the protocol will move from **Applications: Drafts** to **Applications: Under Review**. At this point, no edits can be made, and the protocol will be read-only. If the PI needs to make revisions, contact the UCLA or ACUC Administrator and they will enable editing mode.



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**.

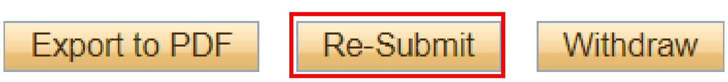
Click Latest Workflow next to the protocol.



View the message from the Administrator.

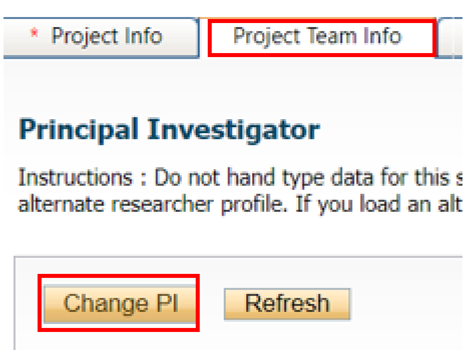
Workflow State	Workflow Message
ORS Review -> **Pending Info by ORS**	Please make revisions to this table.
Pre-Submission -> **ORS Review**	test [Action: Submit]

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



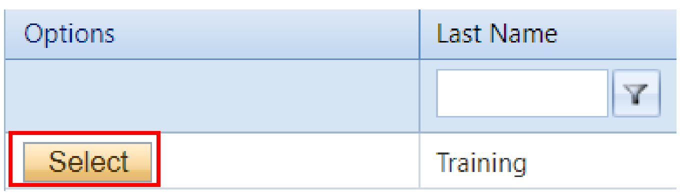
How to Change the Principal Investigator in the System

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



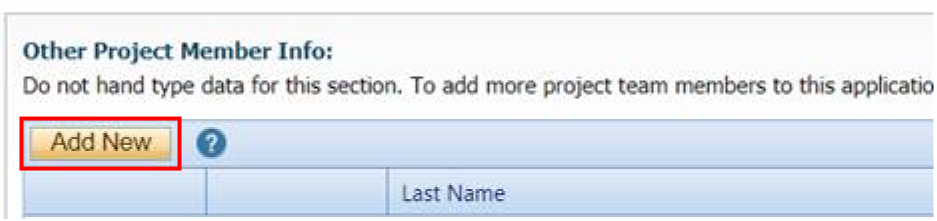
Search for PI's name in the white boxes. If nothing appears, try the first or last name separately (name might include hyphens, initials, etc.)

Select the PI's name.



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.



Click Search Profiles to look up and select their name.

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.