

Office of Research Services ROMEIO Researcher Portal Guides

How to Request an Amendment for a Grant or Contract

If the Principal Investigator would like to make an amendment to an active research project in ROMEIO, click **Applications: Post-Review** from the ROMEIO homepage.

Role: Principal Investigator	
Applications: Drafts	(0)
Applications: Requiring Attention	(0)
Applications: Under Review	(0)
Applications: Post-Review	(0)
Applications: Withdrawn	(0)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
View Events Latest Workflow	1035984	Test	Jaq-Lin Larder (VP, Research and Innovation (Dalhousie)\Office of Research Services)	(Awards\Awards)

Select the Grant/Contract Amendment Request form.

Create New Event

Event Form Name	Description
Grant/Contract Amendment Request	Request to ame
Transfer of Funds Request	Outgoing transi

The form includes the **Event Info** tab where the PI can leave notes for the Administrator (optional), the **Grant/Contract Amendment Request** 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.

The image shows a horizontal tabbed interface with five tabs: "Event Info", "Grant/Contract Amendment Request", "Attachments", "Logs", and "Errors". Below the tabs is a text area labeled "Note(s)" with a large empty rectangular box for input.

After responding to the questions under the Grant/Contract Amendment Request tab, and uploading any required documents to the Attachments tab, click the Submit button.

A row of five buttons: "Save", "Close", "Print", "Export to Word", and "Export to PDF". To the right of these is a "Submit" button, which is highlighted with a red rectangular border.

The same horizontal tabbed interface as above, but now the "Event Info" tab is highlighted with an orange bar, indicating it is the active tab.

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
Grant/Contract Amendment Request	Request to amend an active research project (e.g. no-cost extensions, budget changes, etc.)
Transfer of Funds Request	Outgoing transfers from Dalhousie University to another organization or academic institution.

File No: 1038758

Principal Investigator: Jaq-Lin Larder
Project Title: Test

A vertical navigation menu on the left with three items: "Events: Drafts", "Events: Requiring Attention", and "Events: Under Review". The "Events: Under Review" item is highlighted with a red border and a blue arrow points to it from the left. Below the menu is a table with four columns: "Event No", "Event Category", and "Event Submission Date". The first row of data contains "1038758 - 10095528", "Amendment (Grant/Contract Amendment Request)", and "2023/06/29". To the left of the first cell in the table are two buttons: "View Event" and "Latest Workflow".

Event No	Event Category	Event Submission Date
1038758 - 10095528	Amendment (Grant/Contract Amendment Request)	2023/06/29

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.



- Events: Drafts
- Events: Requiring Attention**
- Events: Under Review

Role: Principal Investigator

- [Applications: Drafts](#)
- [Applications: Requiring Attention](#)
- [Applications: Under Review](#)
- [Applications: Post-Review](#)
- [Applications: Withdrawn](#)
- [Events: Drafts](#)
- [Events: Requiring Attention](#)**
- [Reminders](#)

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



- Events: Drafts
- Events: Requiring Attention
- Events: Under Review
- Events: Post Review**

	Event No
View Event	1035984 - 1007825!
Latest Workflow	

For questions about amendments, please refer to the appropriate contact below:

Office of Research Services

Grants and Contracts (orspost@dal.ca)

Institutional and International (irdadmin@dal.ca)

Legal (orslegal@dal.ca)

For technical assistance with the portal, contact researcher.portal@dal.ca.