Office of Research Services
ROMEO Researcher Portal Guides

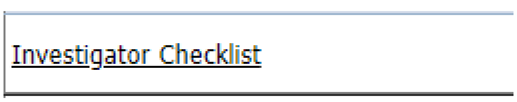
How to Submit a Checklist for Grants and Contracts

Login to the portal through the appropriate link.

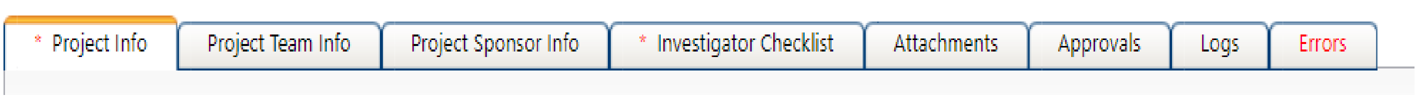
1. [Internal User (Dalhousie NetID)]
2. [External User]

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

Under **Dalhousie – Awards and Clinical Trials**, select the Investigator Checklist.

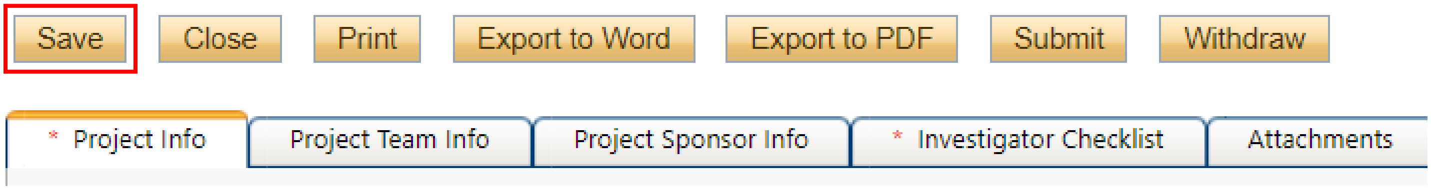


The form includes a series of tabs at the top. The **Errors** tab on the far right will show a list of mandatory questions that need to be answered prior to submitting the form.

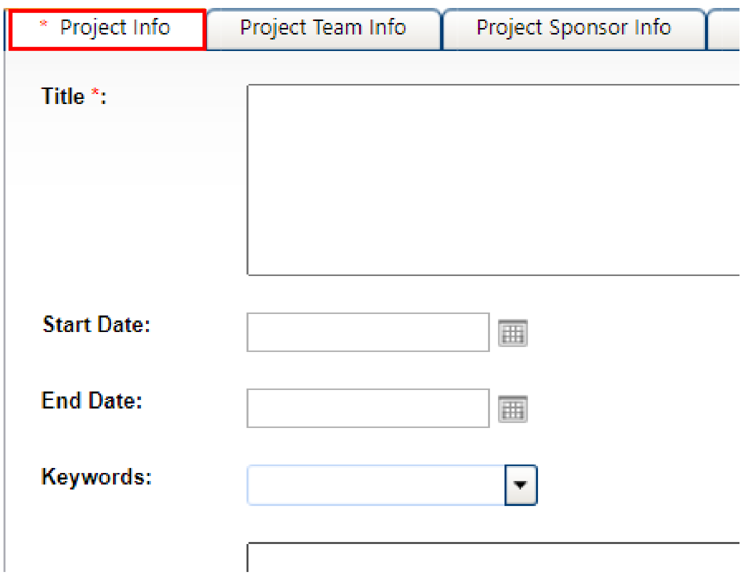


Orange buttons enable functional tasks like saving, printing or submitting the file for review.

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

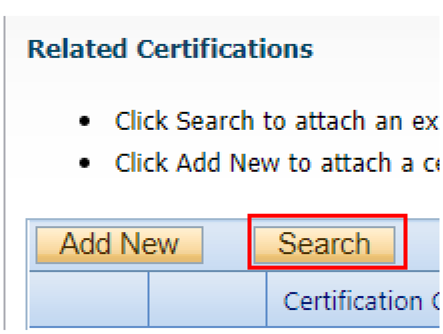


Basic details are captured under the **Project Info** tab, including project title, start & end date (these dates can be estimated if not finalized yet), and keywords relevant to the project.



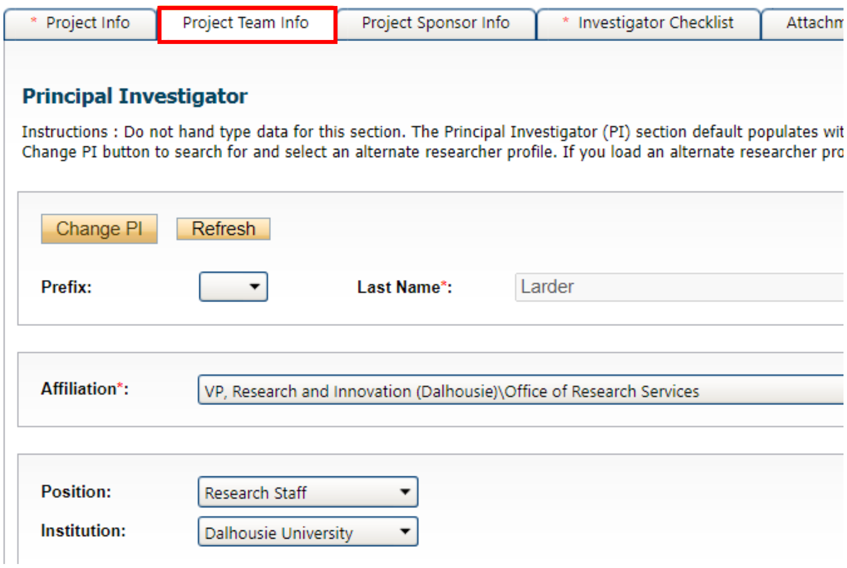
Farther down the page are a series of questions where a “yes” response can be given where applicable.

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.

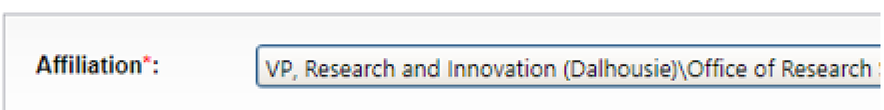


Investigator details are automatically populated under the **Project Team Info** tab. By default, whoever starts the application is listed as the Principal Investigator. If the person is not actually the PI, they can still complete the checklist, but the PI must be the one to click Submit, as the equivalent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

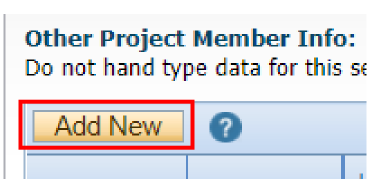
For incoming transfers and other similar partnership projects, the Dalhousie researcher must remain listed as the PI in the ROMEO system as they will be the account holder and are seeking Department/Faculty approval. The lead PI can be added as a team member (if they have a profile in Dal's ROMEO system) or their details can be added to the team member information box under the Project Info tab.



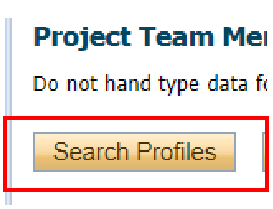
If the PI has multiple appointments, click the Affiliation drop-down box to select the unit to which the application should be routed.



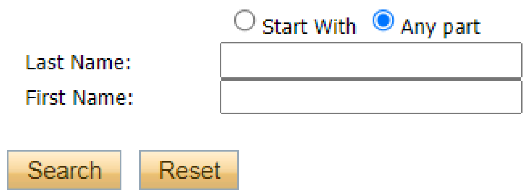
To add project team members, scroll to the bottom of the Project Team Info tab and click Add New.



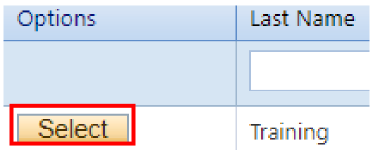
Click Search Profiles.



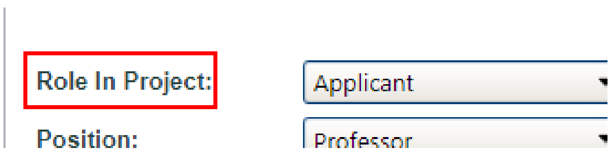
Search by first or last name.



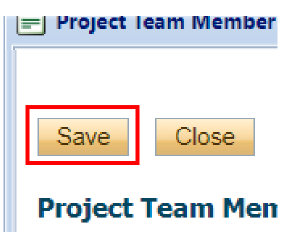
Click the Select button.



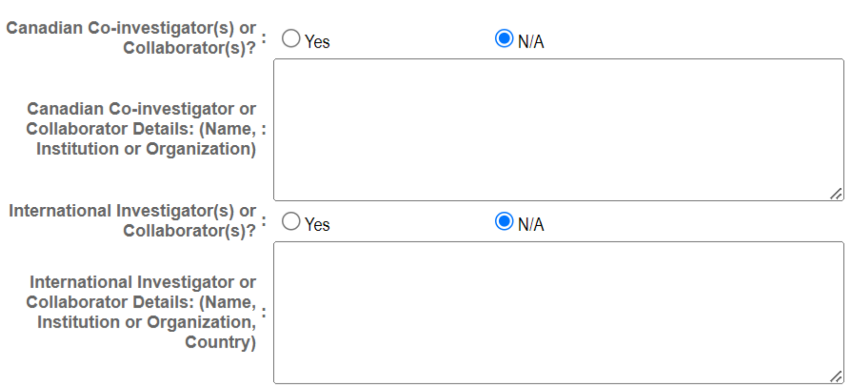
Their profile details will auto-populate. The drop-down list can be used to select their role in the project.



Click the Save button.

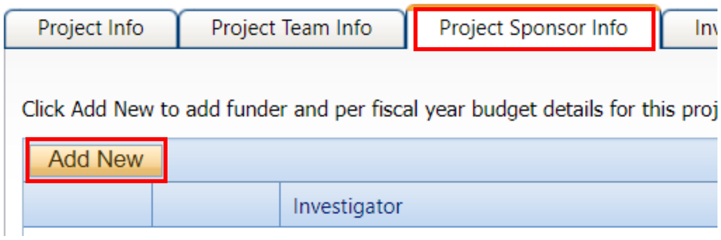


Tip: Most of the existing profiles will be Dalhousie affiliates. If the PI wishes to add someone who is not on the list, two options are available. A request could be sent to researcher.portal@dal.ca to create a profile OR the team member's details can be typed into the boxes under the Project Info tab.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

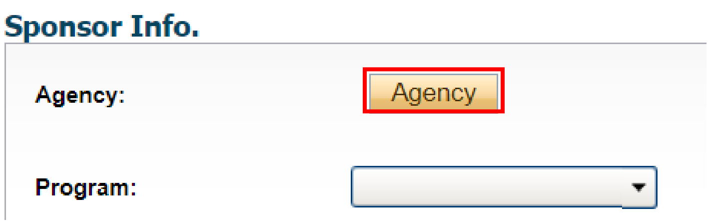


Funding agency details can be captured under the **Project Sponsor Info** tab.

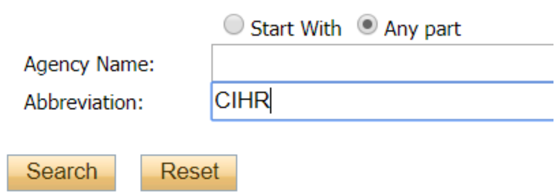
Click Add New.



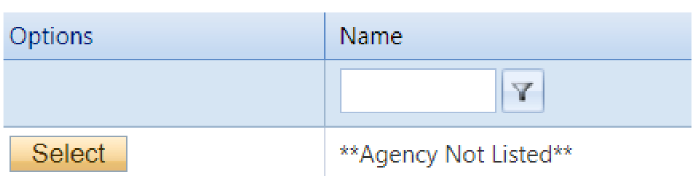
Click Agency.



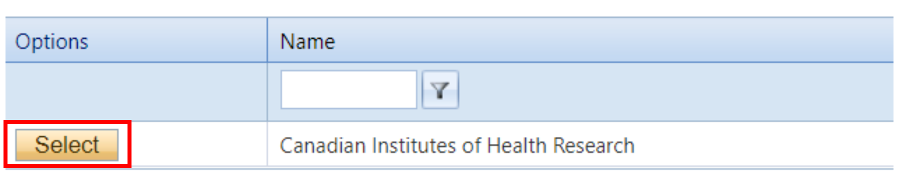
Search for Agency (name or abbreviation).



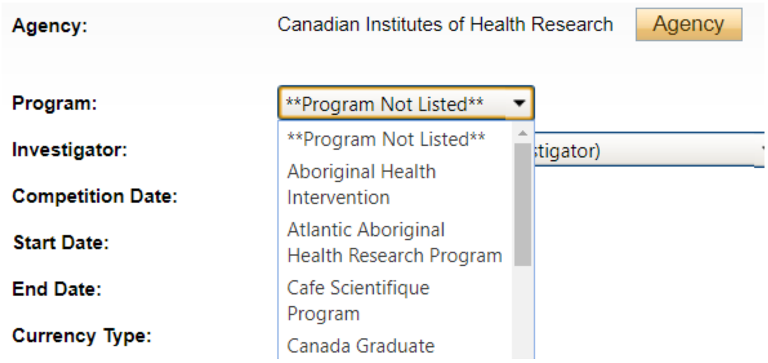
Note: If the agency is not listed, select the “Agency Not Listed” option. Type the agency name in the Comments box.



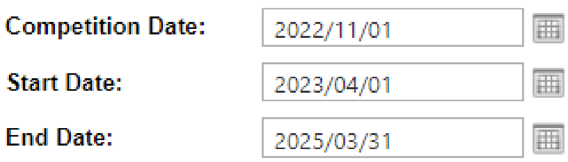
If the agency appears, click the Select button.



Select the program from the drop-down list. Names are arranged in alphabetical order.



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



After entering the start & end dates, click Generate.

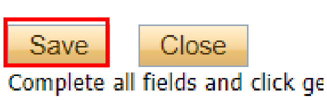
Type the amounts in the white boxes. If the project is awarded, the amounts can still be entered under the “Requested” columns since the “Awarded” columns can only be accessed by ORS and OCIE Administrators.

Canadian currency only – if the funder is international, use the [XE Currency Converter] to convert to CAD.

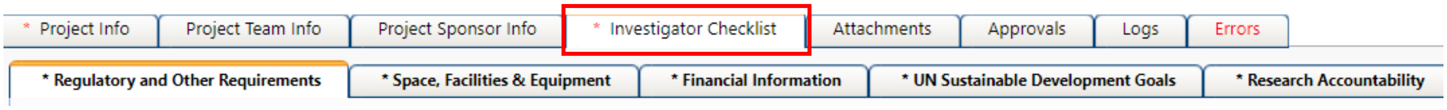
Unless instructed otherwise, the total amounts can be typed in the white boxes in the first row. Administrators will break out the disbursements later.

Year	Start Date	End Date	Requested Cash	Requested In-Kind	Requested Overhead
2024	2023/04/01	2024/03/31	50,000.00	0.00	0.00
2025	2024/04/01	2025/03/31	0.00	0.00	0.00

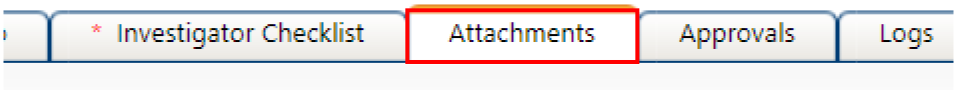
Click the Save button at the bottom or the top.



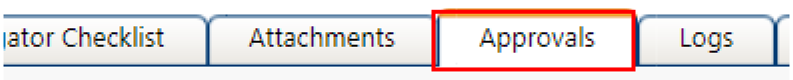
The **Investigator Checklist** tab will produce a number of sub-tabs, with questions related to the project.



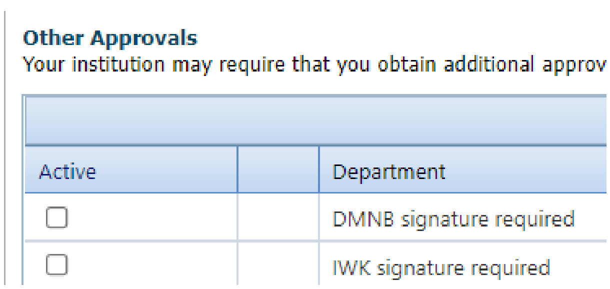
Upload relevant documentation to the **Attachments** tab.



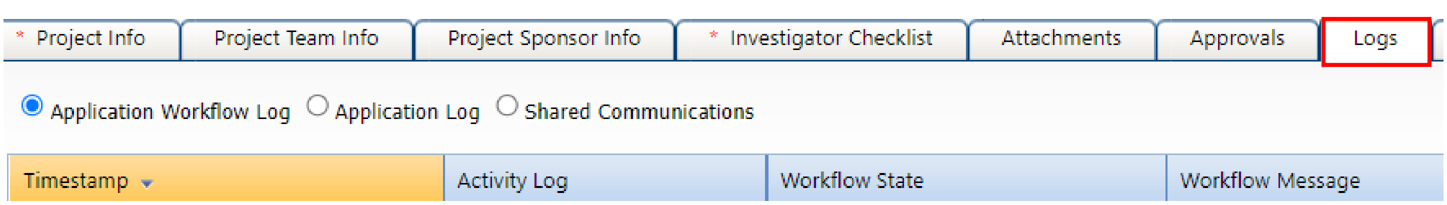
The **Approvals** tab shows the pre-programmed workflow. Most applications are approved by the department first and then the faculty, before reaching the primary office.



The bottom of the Approvals tab will display a list of signatories other than the department and faculty. The questions under the Investigator Checklist tab will provide guidance as to whether additional approvals are needed.

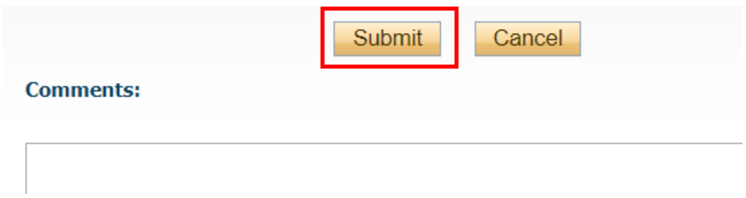


The **Logs** tab will automatically track changes to the file made overtime, as well as messages shared between signing authorities, researchers and administrators.

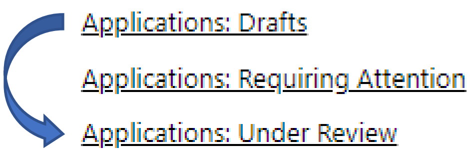


When the application is ready to submit, click the Submit button. **Note**: Only the Principal Investigator can see the Submit button, since it's the equivalent of their electronic signature.

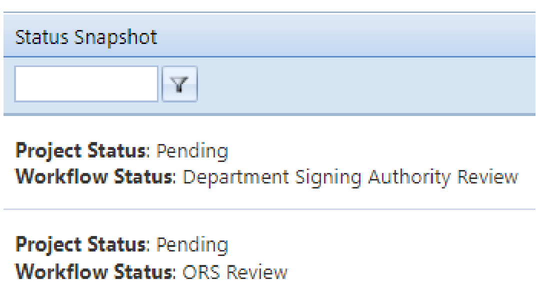
A pop-up box will appear. Add any comments to share with the signing authorities and/or office administrators, then click Submit again.



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.

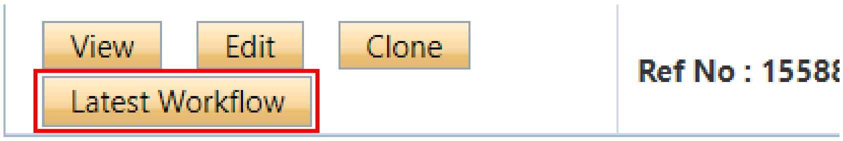


If the PI needs to make revisions, the Status Snapshot will display where the application is currently sitting. The signing authority or ORS/OCIE Administrator can return the application for revision.

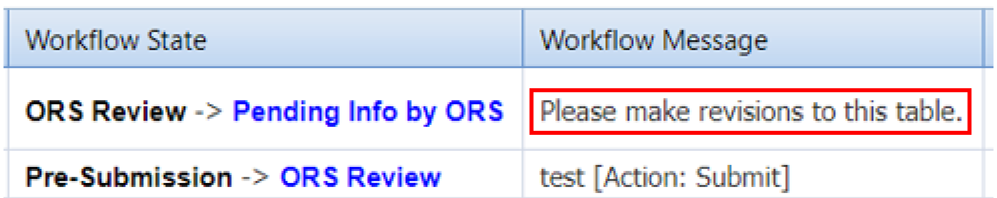


If revisions are required, the PI and project team members will receive an automatic email notification. Login to the portal and click **Applications: Requiring Attention**.

Click Latest Workflow next to the project.



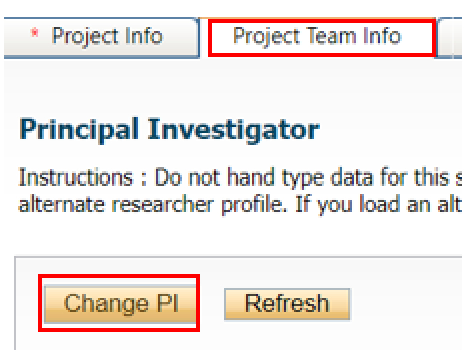
View the message from the signing authority or ORS/OCIE Administrator.



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

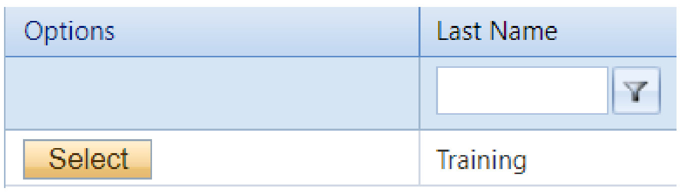
How to Change the Principal Investigator in the System

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



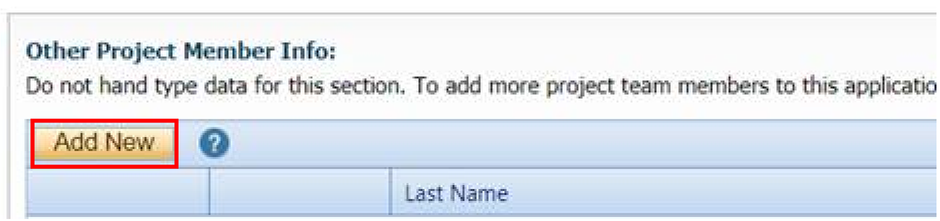
Search for PI’s name in the white boxes. If nothing appears, try the first or last name separately (name might include hyphens, initials, etc.)

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.