

Office of Research Services ROMEО Research 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](#)

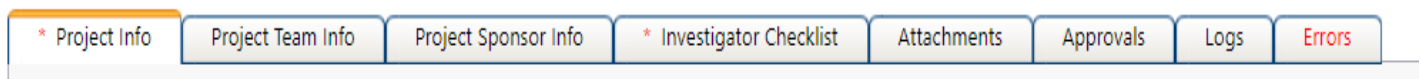
On the right side of the homepage, click Apply New.

APPLY NEW | News | Useful Links

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

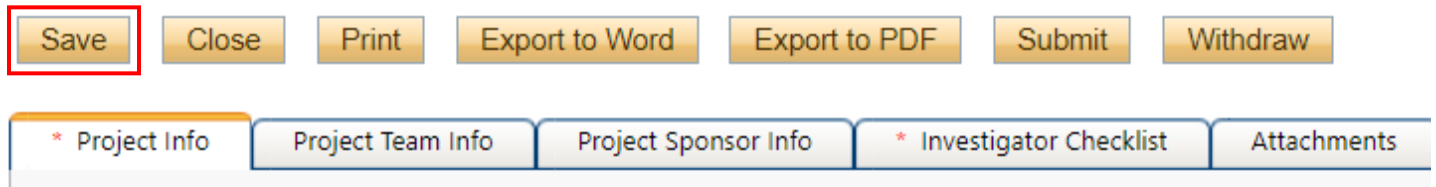
[Investigator Checklist](#)

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.



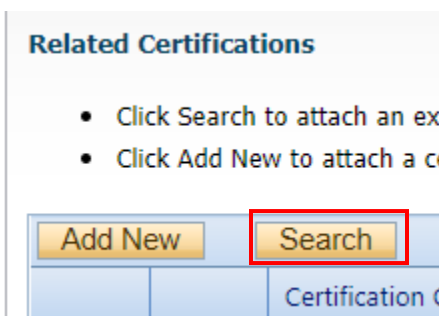
Basic details are captured under the **Project Info** tab, including project title, start & end date (these dates can be estimated if not finalized yet), and keywords relevant to the project.

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

- Title *:** A large text input field.
- Start Date:** A date input field with a calendar icon.
- End Date:** A date input field with a calendar icon.
- Keywords:** A text input field with a dropdown arrow.

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's name and institution can be typed in the Comments box near the bottom of the Project Team Info tab.

* Project Info **Project Team Info** Project Sponsor Info * Investigator Checklist Attachm

Principal Investigator

Instructions : Do not hand type data for this section. The Principal Investigator (PI) section default populates with Change PI button to search for and select an alternate researcher profile. If you load an alternate researcher pro

Change PI Refresh

Prefix: Last Name*: Larder

Affiliation*: VP, Research and Innovation (Dalhousie)\Office of Research Services

Position: Research Staff

Institution: Dalhousie University

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

Affiliation*: VP, Research and Innovation (Dalhousie)\Office of Research Services

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

Other Project Member Info:

Do not hand type data for this section

Add New ?

Click Search Profiles.

Project Team Member

Do not hand type data for this section

Search Profiles

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 n

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

Click Add New.

Project Info | Project Team Info | **Project Sponsor Info** | Inv

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

Add New

Investigator

Click Agency.

Sponsor Info.

Agency: **Agency**

Program: [Empty dropdown]

Search for Agency (name or abbreviation).

Start With Any part

Agency Name: [Empty]

Abbreviation: CIHR

Search **Reset**

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

Options	Name
Select	[Dropdown] **Agency Not Listed**

If the agency appears, click the Select button.

Options	Name
Select	Canadian Institutes of Health Research

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

Agency: Canadian Institutes of Health Research

Program:

Investigator:

Competition Date:

Start Date:

End Date:

Currency Type:

- Aboriginal Health Intervention
- Atlantic Aboriginal Health Research Program
- Cafe Scientifique Program
- Canada Graduate

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

Competition Date:

Start Date:

End Date:

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.

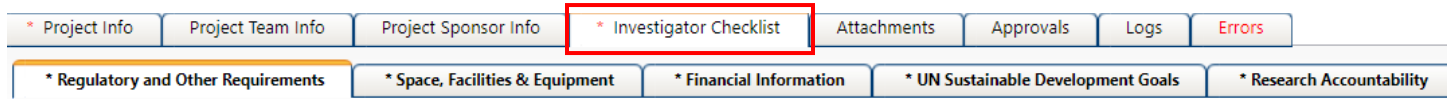
Unless instructed otherwise, the total amounts can be typed in the white boxes in the first row. Administrators will break out the disbursements later.

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

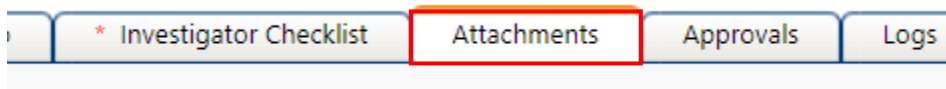
Click the Save button at the bottom or the top.

Complete all fields and click go

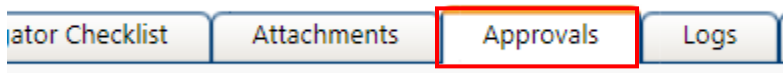
The **Investigator Checklist** tab will produce a number of sub-tabs, with questions related to the project.



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.

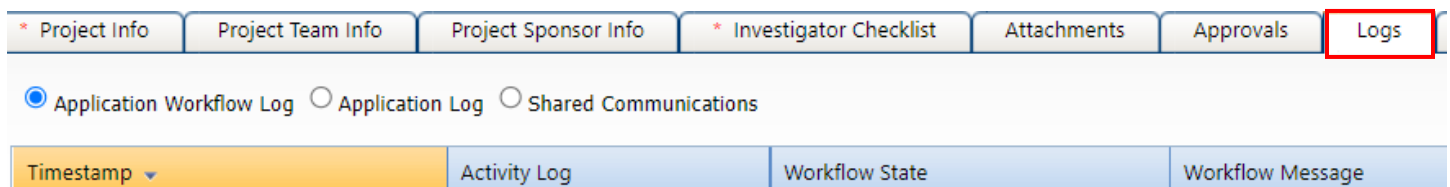


The bottom of the Approvals tab will display a list of signatories other than the department and faculty. The questions under the Investigator Checklist tab will provide guidance as to whether additional approvals are needed.

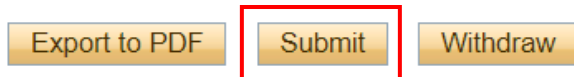
Other Approvals
Your institution may require that you obtain additional approval

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

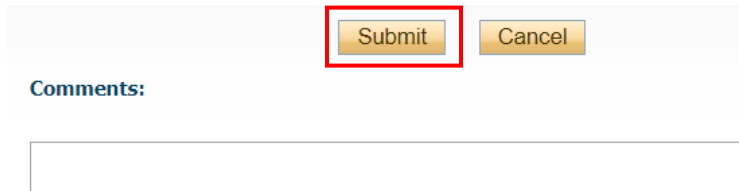
The **Logs** tab will automatically track changes to the file made overtime, as well as messages shared between signing authorities, researchers and administrators.



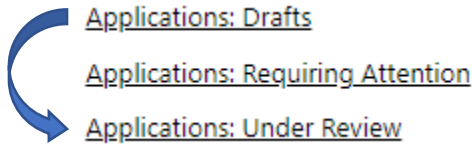
When the application is ready to submit, click the Submit button. **Note:** Only the Principal Investigator can see the Submit button, since it's the equivalent of their electronic signature.



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.

Status Snapshot



Project Status: Pending
Workflow Status: Department Signing Authority Review

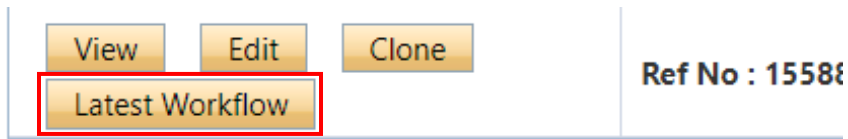
Project Status: Pending
Workflow Status: ORS Review

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](#)

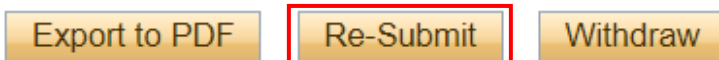
Click Latest Workflow next to the project.



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

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 ROME0 and click the Submit button.