

Office of Research Services ROMEО Research Portal Guides

How to Submit an Outbound Transfer of Funds Request/Amendment

If the Principal Investigator would like to transfer part of their funding to a recipient at another organization or academic institution, click **Applications: Post-Review** from the ROMEО 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Applications: Withdrawn	(0)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" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	All
View Events Latest Workflow	1035984	Test	Jaq-Lin Larder (VP, Research and Innovation (Dalhousie)\Office of Research Services)	(Awards\Awards)

Select the Outbound Transfer of Funds form.

Create New Event

Event Form Name
Agreement/Amendment for ORS Legal Review (No Account Opening)
Grant/Contract Amendment Request
Outbound Transfer of Funds Request/Amendment
Research involving Indigenous communities: submission of documentation or request for partial release of funds

The form includes the **Event Info** tab where the PI can leave notes for the Administrator (optional), the **Outbound Transfer of Funds** 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 screenshot shows a horizontal tabbed interface with five tabs: 'Event Info', '* Outbound Transfer of Funds Request/Amendment', '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 Outbound Transfer of Funds tab, and uploading any required documents to the Attachments tab, click the Submit button.

A horizontal row of six yellow buttons: 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', and 'Submit'. The 'Submit' button is highlighted with a red rectangular border.

The screenshot shows the same horizontal tabbed interface as before, but with the 'Errors' tab removed. The tabs are: 'Event Info', '* Outbound Transfer of Funds Request/Amendment', 'Attachments', and 'Logs'.

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 ORS or OCIE Administrator and they will enable editing mode.

Create New Event

Event Form Name	Description
Agreement/Amendment for ORS Legal Review (No Account Opening)	Application for agreements and amendments to be drafted and data transfer, collaboration or research agreements (re agreements).
Grant/Contract Amendment Request	Request to amend an active research project (e.g. no-cost
Outbound Transfer of Funds Request/Amendment	Outgoing transfers from Dalhousie University to another c through this form.
Research involving Indigenous communities: submission of documentation or request for partial release of funds	Please use this ROMEO event form to submit documentat request for a partial release of funds to support early eng

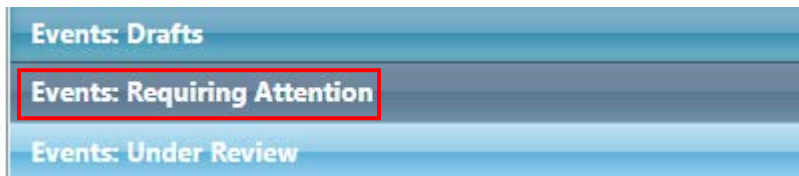
File No: 1035984

Principal Investigator: Jaq-Lin Larder
Project Title: Test

The screenshot shows a vertical 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 rectangular border. A blue curved arrow points from this item to the right. To the right is a table with columns for 'Event No' and 'Event Category'. Below the table are two buttons: 'View Event' and 'Latest Workflow'.

Event No	Event Category
1035984 - 10078256	Transfer of Funds (Transfer of Funds Request)

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.



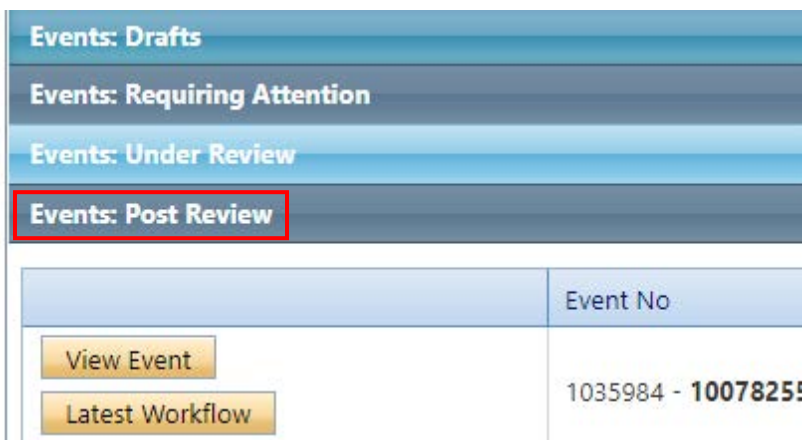
- Events: Drafts
- Events: Requiring Attention**
- Events: Under Review



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 sub-awards, please refer to the appropriate contact below:

Office of Research Services

Grants and Contracts (orspost@dal.ca)

International (irdadmin@dal.ca)

Office of Commercialization and Industry Engagement

ocie@dal.ca

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