

## Office of Research Services ROMEO Researcher Portal Guides

### Release of Funds – Projects Involving Indigenous Engagement

If the Principal Investigator would like to request a partial release of funds for projects involving Indigenous engagement, click **Applications: Post-Review** from the ROMEO homepage.

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Applications: Withdrawn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

Select the Indigenous release of funds form.

Event Form Name
<a href="#">Agreement for ORS Legal Review (No Account Opening)</a> <div style="border: 2px solid red; padding: 2px;"> <a href="#">Research involving Indigenous communities: submission of documentation or request for partial release of funds</a> </div>

The form includes the **Event Info** tab where the PI can leave notes for the Administrator (optional), the **Indigenous release 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', '\* Research involving Indigenous communities: submission of documentation or request for partial release of funds', 'Attachments', 'Logs', and 'Errors'. Below the tabs is a text input field labeled 'Note(s)'.

After responding to the questions under the release of funds 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'. The 'Submit' button is highlighted with a red rectangular border.

The screenshot shows the same horizontal tabbed interface, but the 'Errors' tab is no longer visible. The active tabs are 'Event Info', '\* Research involving Indigenous communities: submission of documentation or request for partial release of funds', and 'Attachments'.

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
<a href="#">Agreement for ORS Legal Review (No Account Opening)</a>	Application for agreements to be drafted/reviewed by ORS Legal, that v software agreements, and space / facility access agreements.
<a href="#">Research involving Indigenous communities: submission of documentation or request for partial release of funds</a>	Please use this ROMEO event form to submit documentation indicating Communities.
<a href="#">Grant/Contract Amendment Request</a>	Request to amend an active research project (e.g. no-cost extensions, b
<a href="#">Transfer of Funds Request</a>	Outgoing transfers from Dalhousie University to another organization o

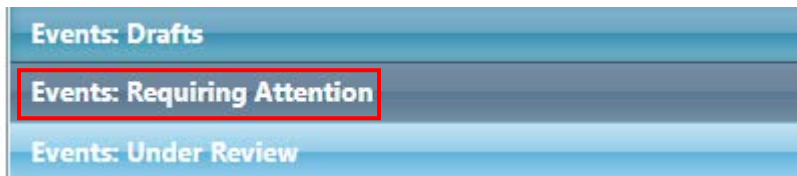
### File No: 1040079

Principal Investigator: Jaq-Lin Larder  
Project Title: test

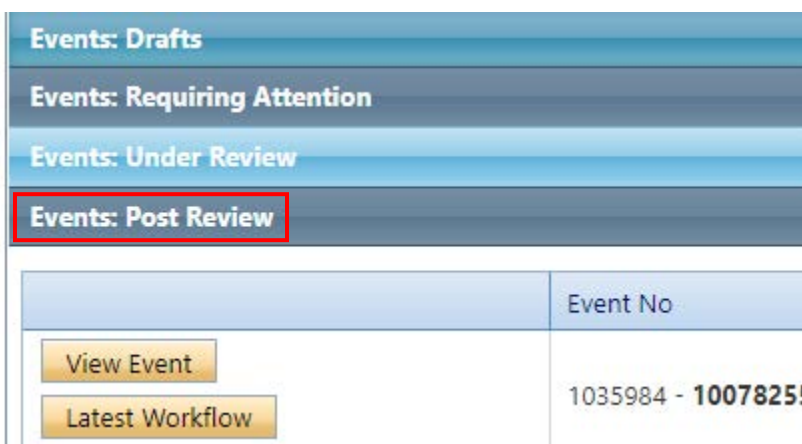


Events: Drafts		
Events: Requiring Attention		
Events: Under Review		
	Event No	Event Category
<a href="#">View Event</a> <a href="#">Latest Workflow</a>	1040079 - 10103512	Release of Funds (Research in submission of documentation

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.



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



For questions about the Indigenous engagement release of funds process, please contact [IndigenousResearch@dal.ca](mailto:IndigenousResearch@dal.ca).

For technical assistance with the portal, contact [researcher.portal@dal.ca](mailto:researcher.portal@dal.ca).