

## Office of Research Services ROMEO Researcher Portal Guides

### How to Request an Outgoing Transfer of Funds

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 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Applications: Withdrawn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" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	All
<a href="#">View</a> <a href="#">Events</a> <a href="#">Latest Workflow</a>	<b>1035984</b>	Test	Jaq-Lin Larder (VP, Research and Innovation (Dalhousie)\Office of Research Services)	(Awards\Awards)

Select the Transfer of Funds Request form

### Create New Event

Event Form Name
<a href="#">Transfer of Funds Request</a>

The form includes the **Event Info** tab where the PI can leave notes for the Administrator (optional), the **Transfer of Funds 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 row of five tabs: "Event Info", "\* Transfer of Funds 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 Transfer of Funds Request tab, and uploading any required documents to the Attachments tab, click the Submit button.

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

A partial view of the form tabs, showing "Event Info", "\* Transfer of Funds Request", "Attachments", "Logs", and "Errors".

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
Transfer of Funds Request	Outgoing transfers from Dalhousie University to another ins

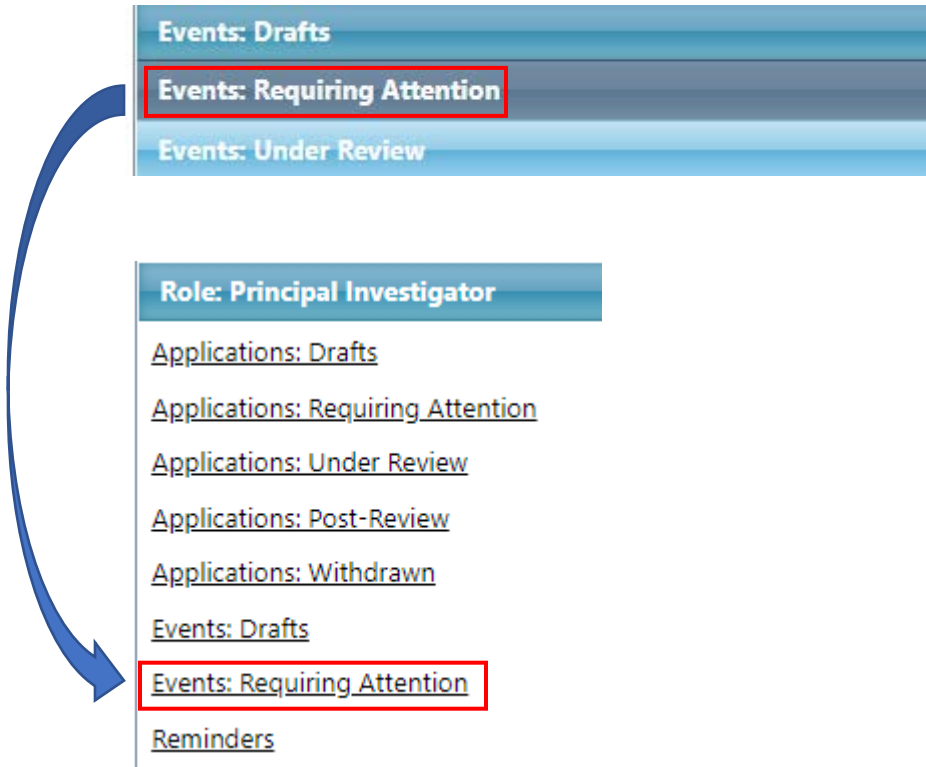
**File No: 1035984**

Principal Investigator: Jaq-Lin Larder  
 Project Title: Test

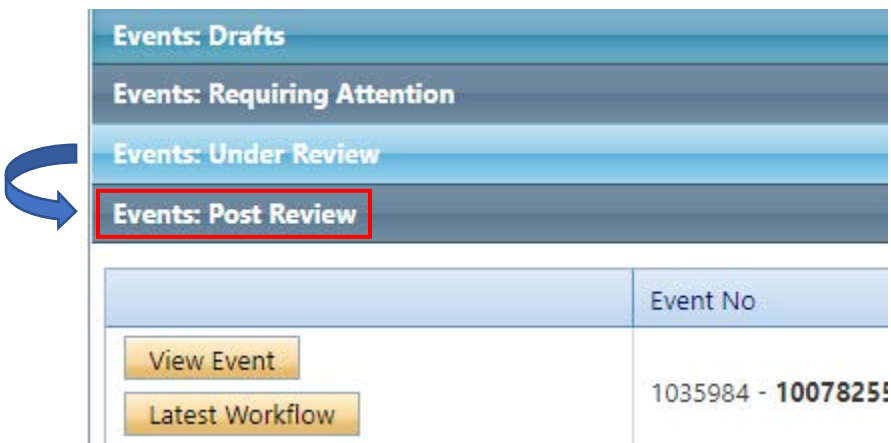
The image shows a navigation menu on the left with three items: "Events: Drafts", "Events: Requiring Attention", and "Events: Under Review". The "Events: Under Review" item is highlighted with a red rectangular border. A blue curved arrow points from the "Events: Under Review" item to the table below. The table has three columns: "Event No", "Event Category", and an unlabeled column containing buttons. The data row shows "1035984 - 10078256" for the Event No and "Transfer of Funds (Transfer of Funds Request)" for the Event Category.

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.



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

**Office of Research Services**

Grants and Contracts ([orspost@dal.ca](mailto:orspost@dal.ca))

International ([irdadmin@dal.ca](mailto:irdadmin@dal.ca))

**Office of Commercialization and Industry Engagement**

[ocie@dal.ca](mailto:ocie@dal.ca)

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