ROMEO

Research Management System

Guide for Investigators and Research Staff

Reminder:

A Research Approval Form ("RAF") must be completed through the NOSM University ROMEO Research Portal before you apply for external Sponsor funding:

- That will be held and administered at NOSM University (including Sub-Awards)
- That will be administered at Laurentian University or Lakehead University on NOSM University's behalf
- That is sponsored by NOAMA
- That is being spent at NOSM University through an agreement (e.g. HSNF grants)

Contents

Where do I find more information? 3
ROMEO Resources 3
ROMEO Support 3
IT Support 3
ROMEO Research Management System Overview 3
General Information 3
System overview 3
The approval process for submitted Research Approval Forms: A Detailed Overview 4
Other ROMEO Systems 5
Navigating this manual 5
Navigating ROMEO 5
Logging in 5
Navigating the Home Page 6
Finding your Projects – Organizational Categories 7
Search Bar 7
Navigation Bar 8
Profile 8
Navigating Within a Project – New Application 9
Related Certification Section: Not currently operational 10
Project Info 10
Project Team Info 11
Project Sponsor Info 12
Research Approval Form Custom Tabs 13
Attachments 14
Approvals 14
Logs 14
Errors 15
Submitting your Application 16
Post-Submission 16
How to submit an Event Form 16
Event Form Approval Process 17
Reminders 18
Helpful Hints 18

Where do I find more information?

ROMEO Resources

NOSM University ROMEO Research Portal
Lakehead University ROMEO Research Portal
Laurentian University ROMEO Research Portal
Thunder Bay Regional Health Sciences ROMEO Research Portal

ROMEO Support

NOSM University ROMEO Supports

IT Support

NOSM U IT Helpdesk Contact Information

ROMEO Research Management System Overview

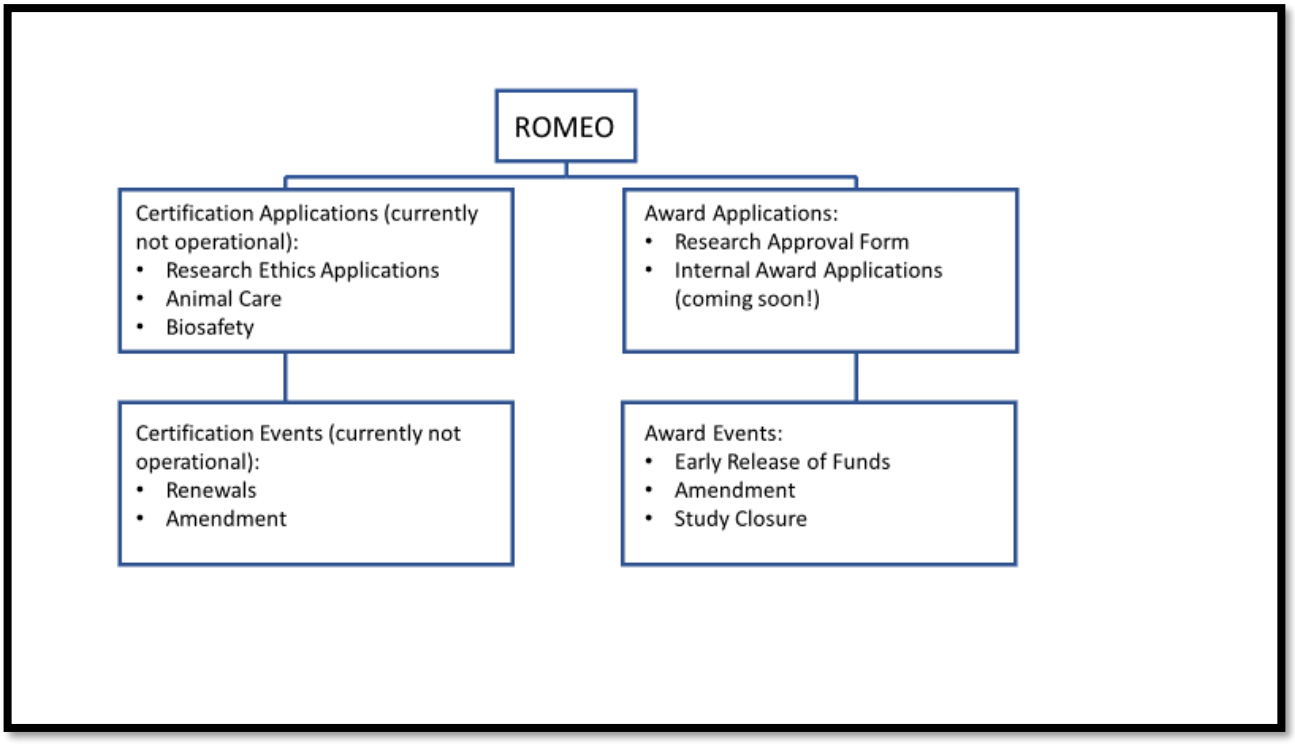
General Information

The ROMEO Research Management System (ROMEO) is a web-based system that allows you to apply for and manage awards, certifications, and grant applications.

System overview

The ROMEO Research Management System has two components – **Awards** (grant application, grant registration, contract submission, contract execution, etc.) and **Certifications** (Research Ethics Board, Animal Care, Biohazard, etc.) NOSM University's ROMEO system is only utilizing the **AWARDS** component currently. If your project requires Ethics, Animal Care, Biohazards, or any other related certification, **OR**, if your project can not be administered by NOSM University, **a separate ROMEO application through Lakehead or Laurentian University's ROMEO system is required**. You may also need to apply through one of the Hospitals if your research involves them. If you have questions about any of the above, contact us at research@nosm.ca.

Submissions in ROMEO, whether Awards or Certification, are divided into two categories, Applications and Events. **Applications** are to create a new file, with the intention to apply for a new funding competition (using the Research Approval Form), register a new project, or apply for new REB approval (as mentioned above, our system is not yet configured for REB applications). **Events** are used to add information to an existing project, whether it is to submit a report or an amendment to a registered grant.



The approval process for submitted Research Approval Forms: A Detailed Overview

1) The researcher submits the Research Approval Form in ROMEO, and an email is sent to the Researcher confirming submission.
2) The Research and Graduate Studies Office receives notification in ROMEO of the submission.
3) The Research Approval Form is sent to the appropriate Immediate Supervisor for review.
4) The Immediate Supervisor Approves the Research Approval Form or Requests More Information, and then an email is sent to the researcher confirming the Immediate Supervisor's decision.
5) Once the Immediate Supervisor has approved, the Research Approval Form is sent to the Vice-President, Research and Graduate Studies, for review and approval.
6) The Vice-President, Research and Graduate Studies will Approve the Research Approval Form, Request More Information or Not Approve, and an email is sent to the researcher. If approved, a Letter of Approval will be included.
7) Approved Research Approval Forms can be found in your ROMEO file.

Other Research Management Systems

Lakehead University, Laurentian University, and Thunder Bay Regional Health Sciences Centre, have their own ROMEO systems, and some certifications will need to be entered into those systems separate from the NOSM University ROMEO system. Links to the other ROMEO systems are listed on the **Where can I find more information** page.

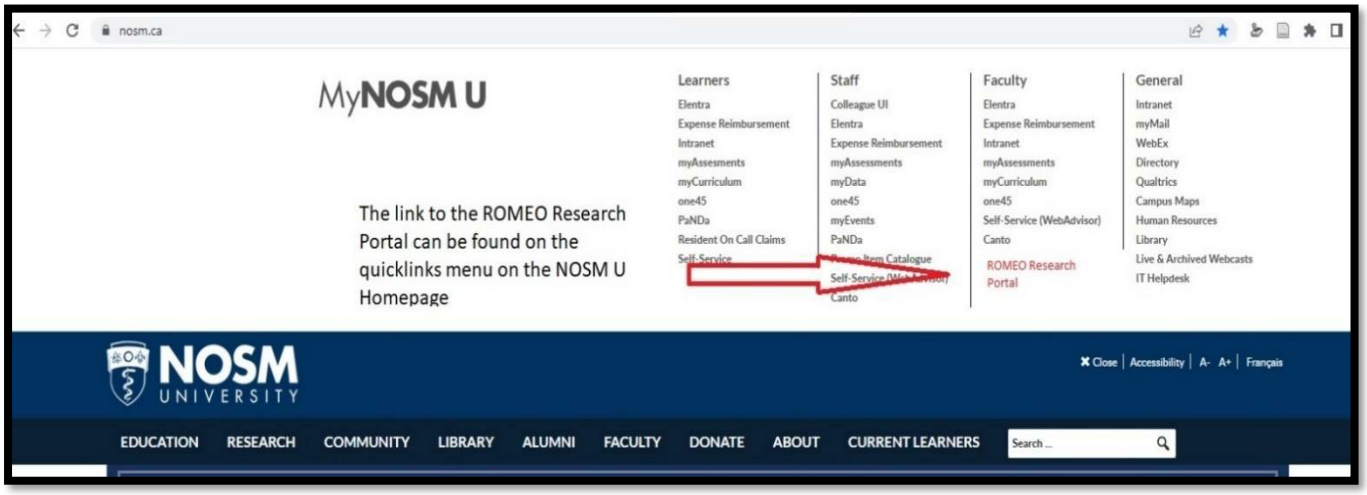
Navigating this manual

This manual includes a break-down of applications and events within NOSM University's ROMEO system and is intended to be viewed electronically. It includes hyperlinks to navigate to the section, which is most applicable to you, and contact information if you have further questions. Note: the hyperlinks may be tied to SharePoint, so for optimal use of this manual please log in through NOSM University's Intranet.

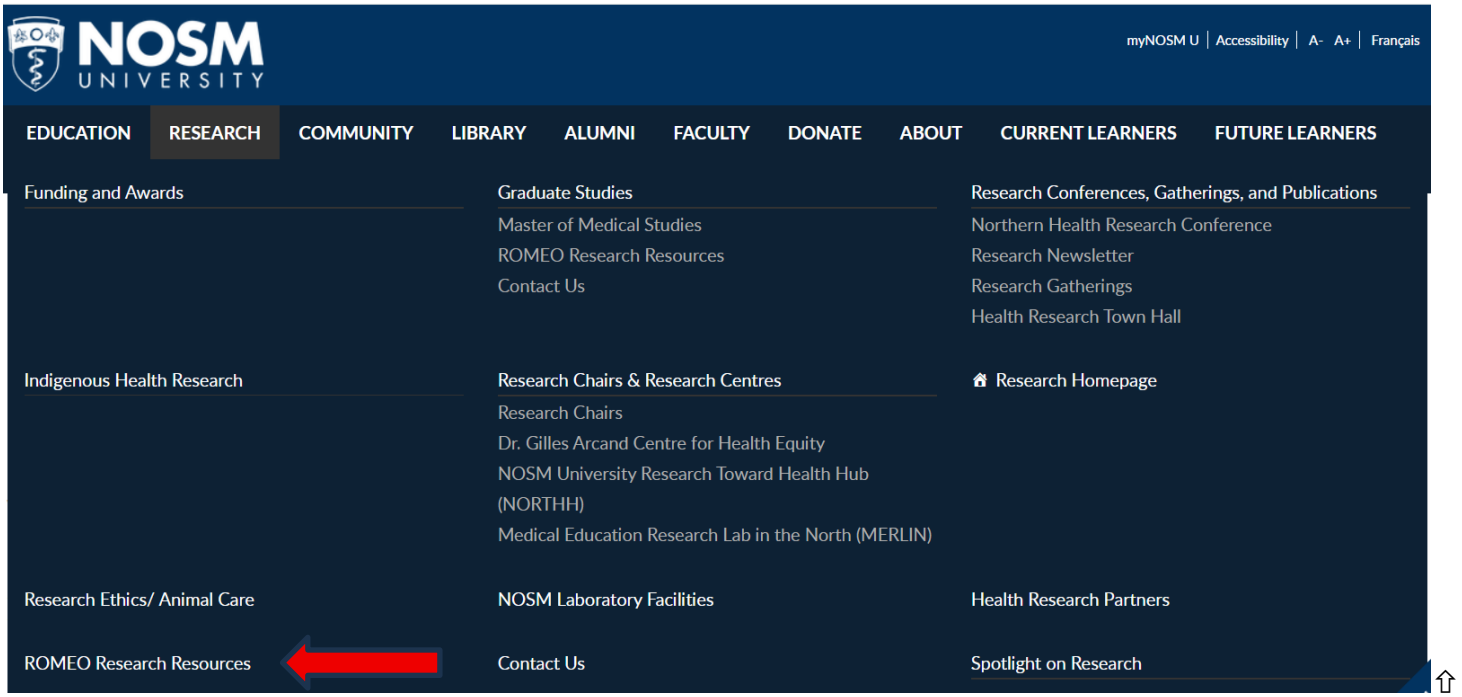
Navigating ROMEO

Logging in

All NOSM University Faculty and Staff can access ROMEO their Single Sign On username and password, much like you would for other NOSM University web applications (Intranet, email, Webadvisor, Colleague etc.). Most NOSM University faculty, residents and students have already been registered in ROMEO. By clicking on the Research Portal link for INTERNAL ROMEO USERS, you can login with your SSO credentials which is your NOSM University username and password. If you have any difficulties with this, you can reset your SSO, and IT has instructions for how to do this, or email IT Helpdesk at helpdesk@nosm.ca.

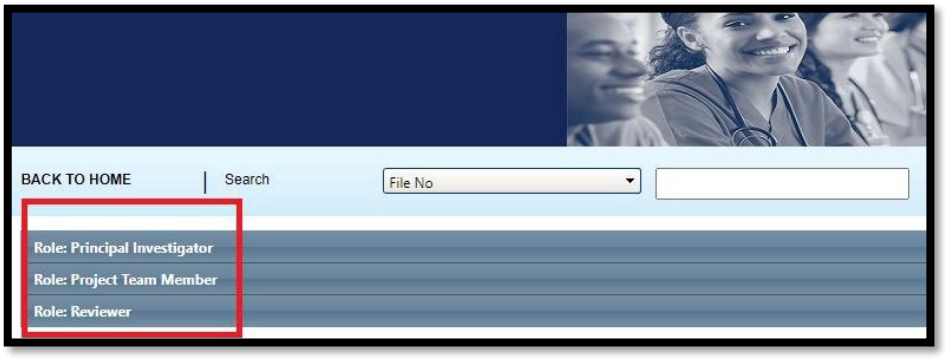


If you are connecting from outside the NOSM University server, ROMEO is available on the internet through the NOSM University ROMEO webpage. If you are frequently logging in off-site, it is recommended you bookmark this link in your browser for easy access.



Navigating the Home Page

Once logged in, you will see up to three roles – Principal Investigator, Project Team Member, and / or Reviewer. Your files will be organized based on your role in each individual study. If you are listed as the **Principal Investigator** on a project, you will find your documents for this project under the Principal Investigator tab. If you are listed as **any other Project Team Member (Co-Investigator, Research Coordinator, Administrative staff),** you will find the documents for this project under the Project Team Member tab. If you are selected to be a reviewer, the relevant documents can be found under the **Reviewer** role. For instructions specific to the Reviewer role, please email research@nosm.ca.



Finding your Projects – Organizational Categories

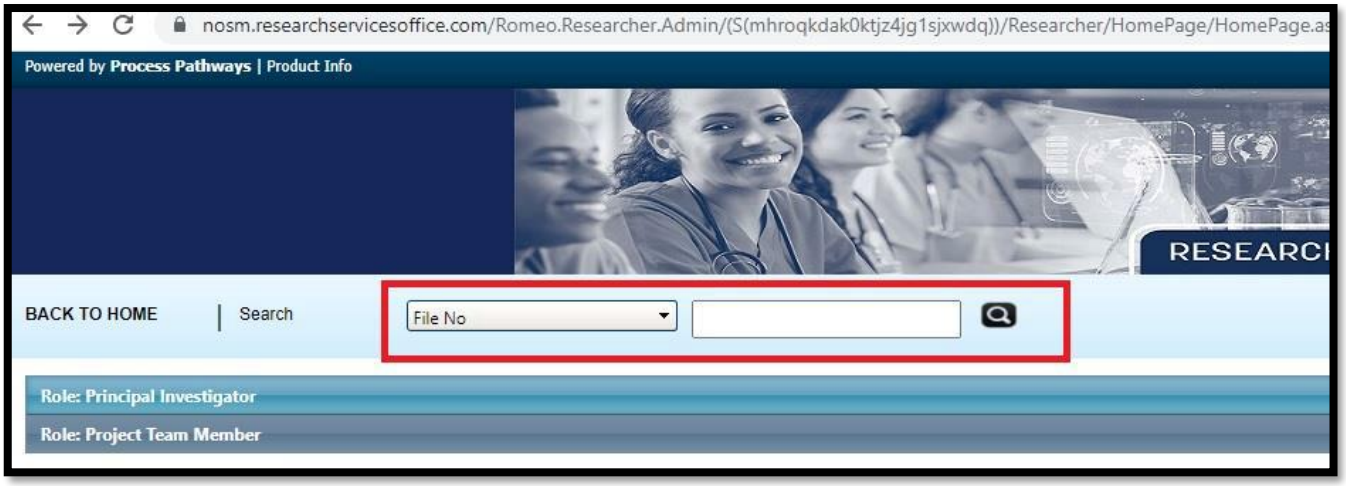
On the home screen, there are five locations where your projects could be stored in each of the role blocks. These categories are standard across the Principal Investigator and Project Team Member roles.

Applications: Drafts – Incomplete applications that have not been submitted.
Applications: Requiring Attention – Submitted applications that been returned by a reviewer as they require edits.
Applications: Under Review – Applications still in review by the Research and Graduate Studies office and signing authorities; these applications are not yet approved.
Applications: Post-Review – Applications that have been approved.
Applications: Withdrawn – Applications the investigator has withdrawn from evaluation.

In addition, there are three event-specific categories which provide a quick link to the already submitted project and the specific event in question.
Events: Drafts – Projects with incomplete Event Forms not yet submitted for review.
Events: Requiring Attention – Projects with event forms returned to the research team by a reviewer as they require edits.
Reminders – Quick reference to projects with upcoming renewals or to funding applications requiring reporting.

Search Bar

You can search for your ROMEO file or event using its File number, Reference number, Event number, or Event Reference numbers. This will bring you directly to the file or event in question.



Alternatively, you can also view your ROMEO files by clicking on the “Applications Post Review” tab.

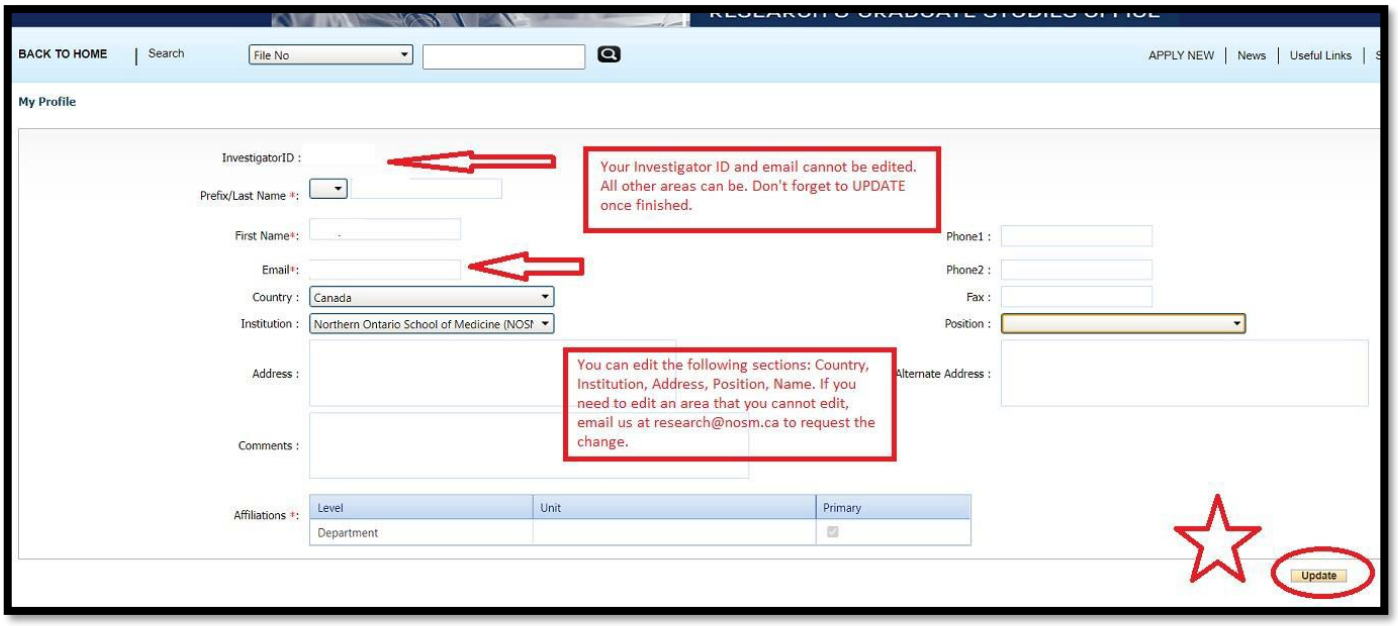
Navigation Bar

The **Apply New** button will allow you to begin a new application.

Profile

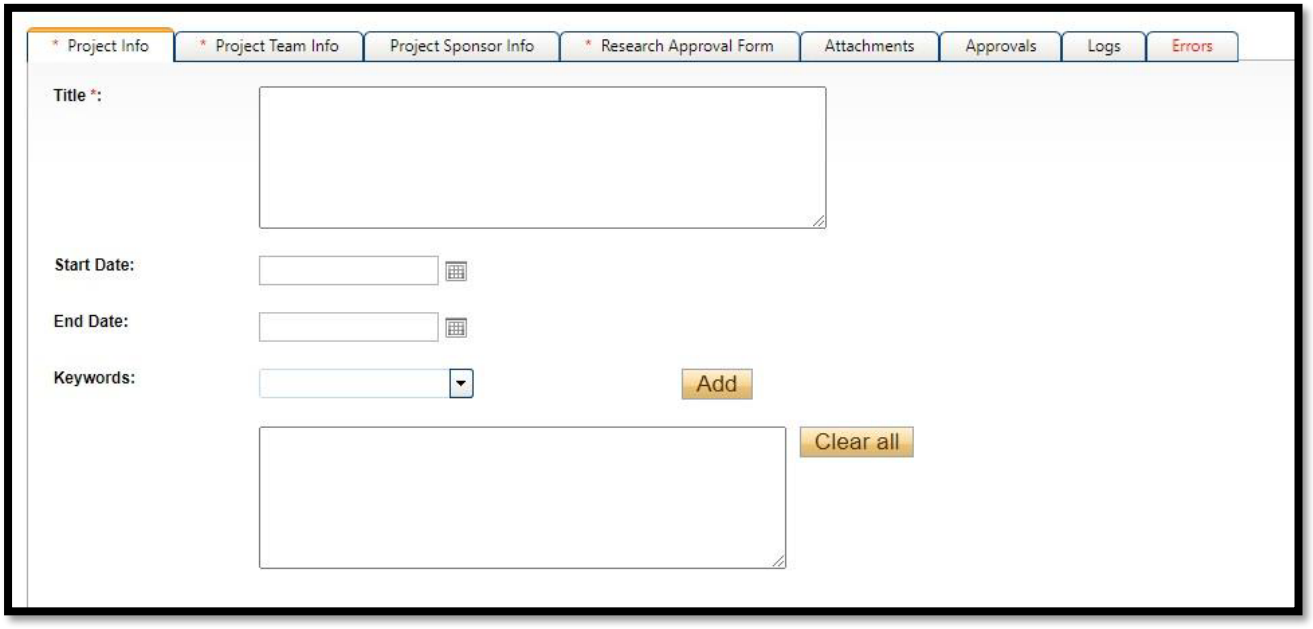
Your personal profile is available through **My Profile**.

Once you have entered your profile, changes can be made to all areas except the following: Investigator ID, Email, and Primary Affiliation. If changes need to be made to those sections, they can only be changed by the Research Services Office. Don't forget to save any changes by clicking on the **Update** button on the bottom right of the screen.



Navigating Within a Project – New Application

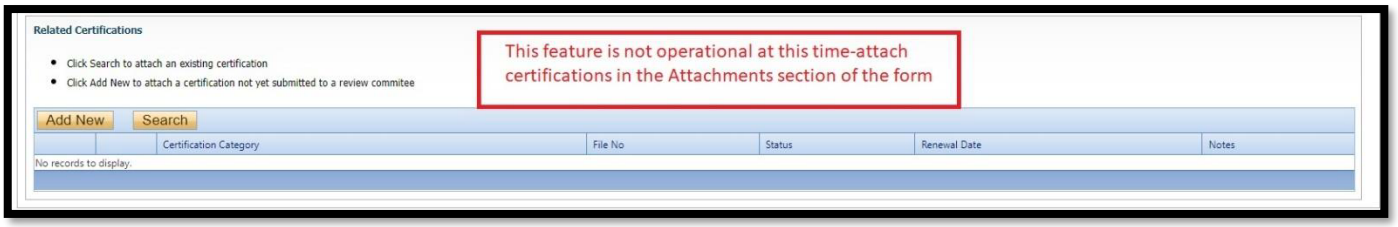
There are five main tabs within any Research Approval Form application (**Project Info**/**Project Team Info**/**Project Sponsor Info**/**Research Approval Form**/**Attachments**). The **Research Approval Form** tab is a custom tab for NOSM University, and all other tabs are standard within ROMEO.



The main page of the Research Approval Form asks a series of standard questions related to the project. You will also be asked to identify the *strategic areas of research*, the *field of research*, *location*, *administering institution* and a few other general questions on the first page. This information assists us with routing and administration of the form.

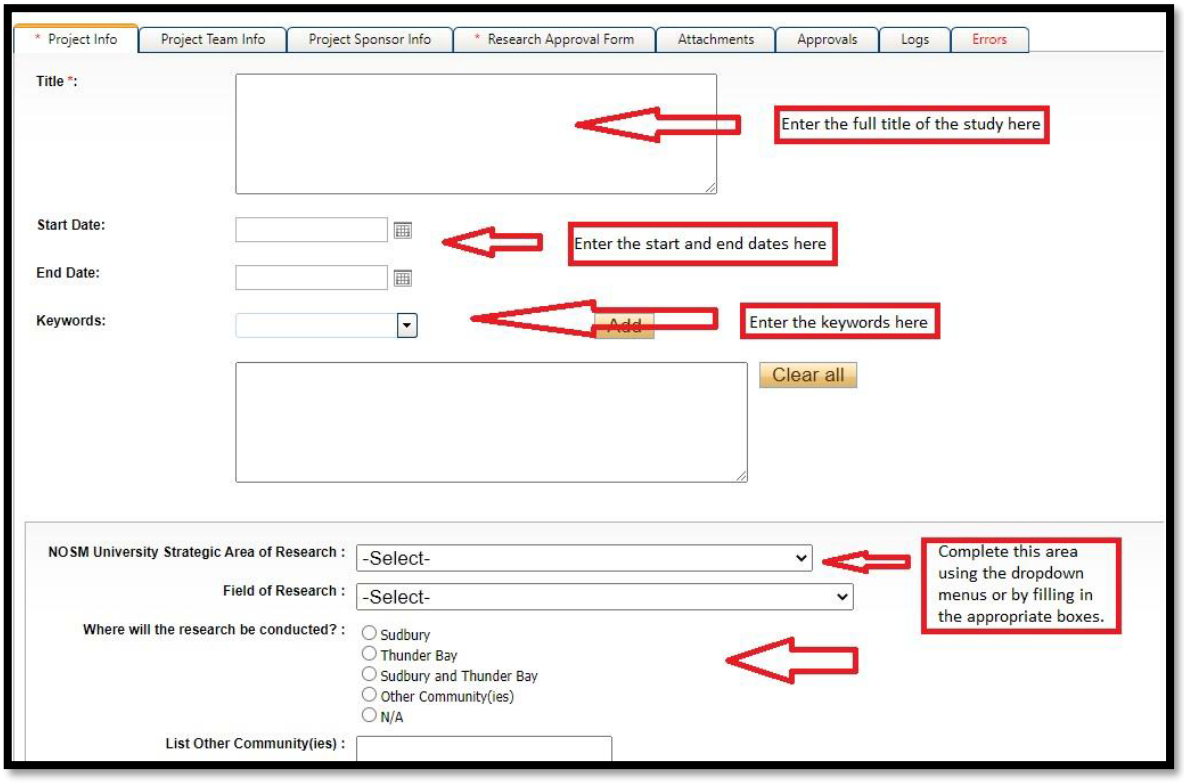
Related Certification Section: Not currently operational

Our ROMEO Research Portal is currently being used for Awards only. As we do not hold or administer any Certifications (REB, Animal Care, etc.), the **Related Certifications** section on the Research Approval Form is not currently operational. If you need to include any certifications for the project, please add them in the **Attachments** section of the form.



Project Info

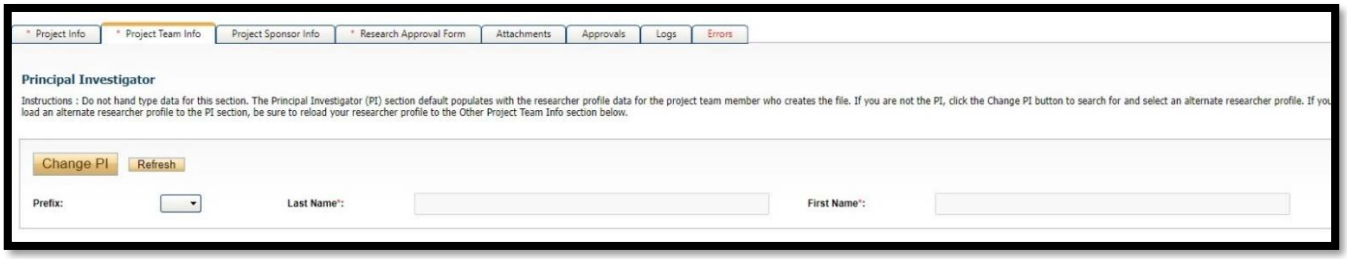
The Project Info tab is where you enter the title, start and end dates, keywords, and other important information about the proposal. Remember to save often, as there is not an auto save feature in the system.



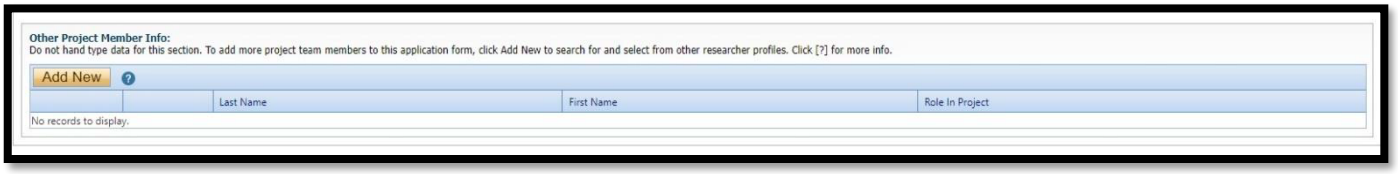
Project Team Info

In this section you add all team members to the application. This is done by clicking on the “add new” button on the bottom left of the form. The Project Team Info tab captures key project team data, such as the Principal Investigator (“PI”), team affiliations and contact information. Residents, Graduate Students and Undergraduate Students must be added as Other Project Members on the application even if it is their project.

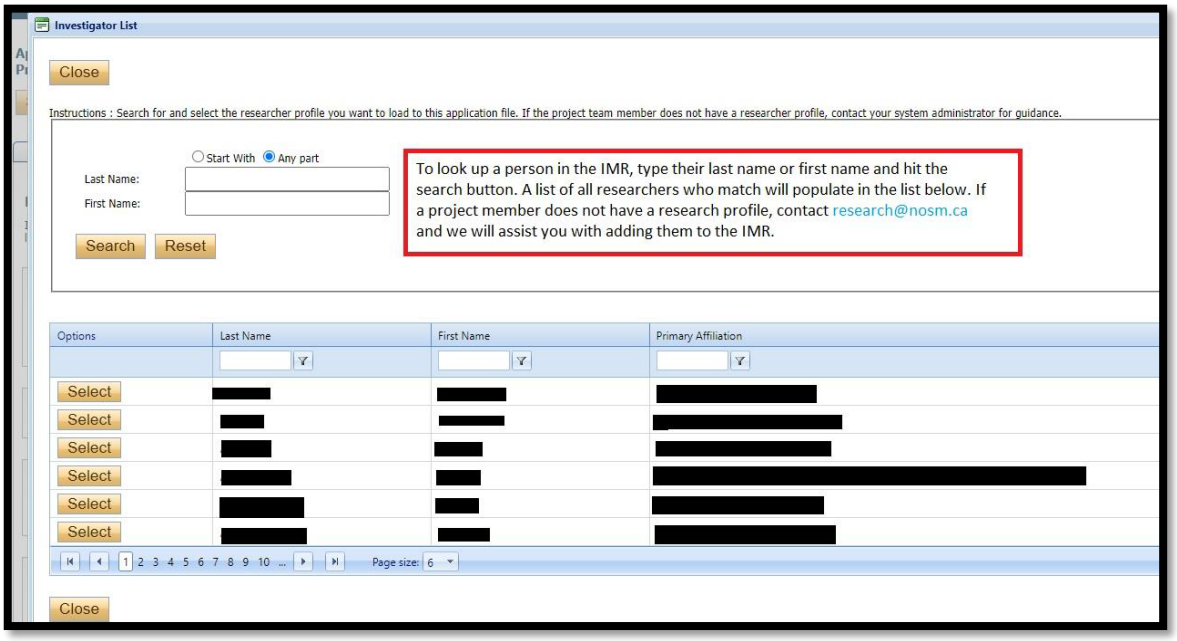
NOSM University-affiliated investigators and staff (coordinators, research assistants) must be listed on this file. If you are hiring new staff to assist with this project, review Human Resource’s Hiring on Sponsored Research Funds SharePoint site.



When changing the PI or adding new team members, you will be brought to the Investigator Master List (IMR).



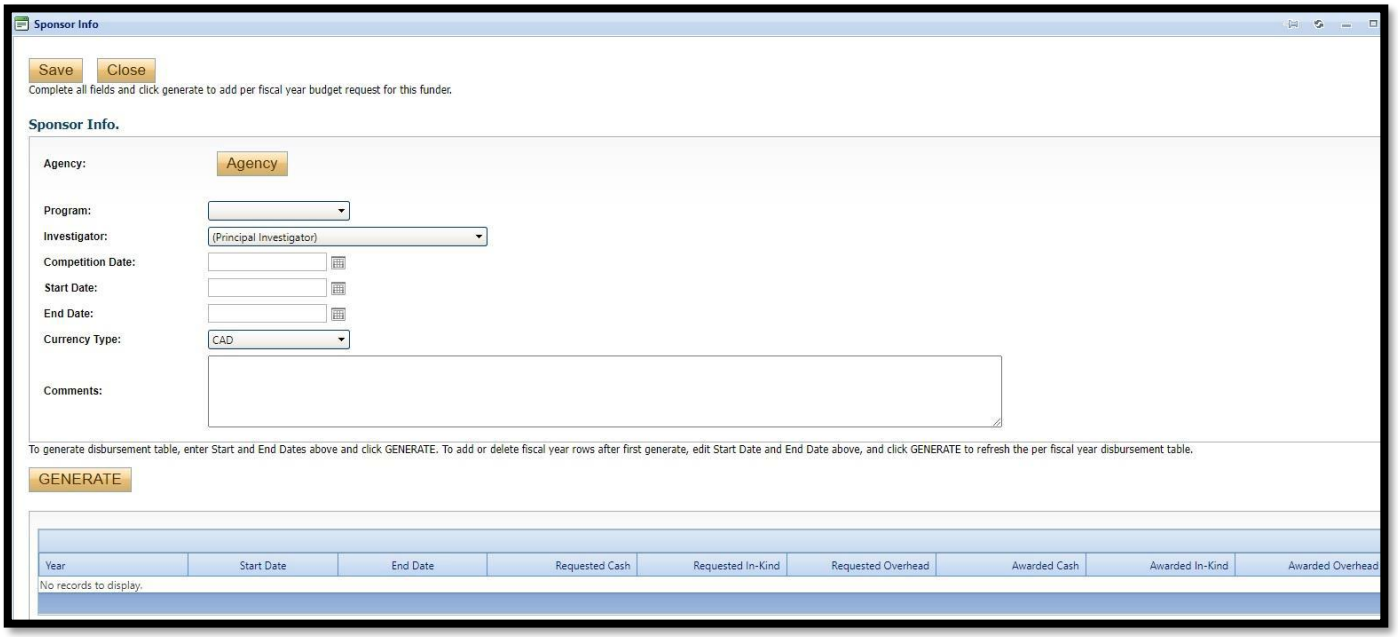
You will need to first search for them using their first and last name. Once you have their name in the list below, click on **Select** to add them to the project. Remember to make sure they have the appropriate **Role** in the project.



Project Sponsor Info

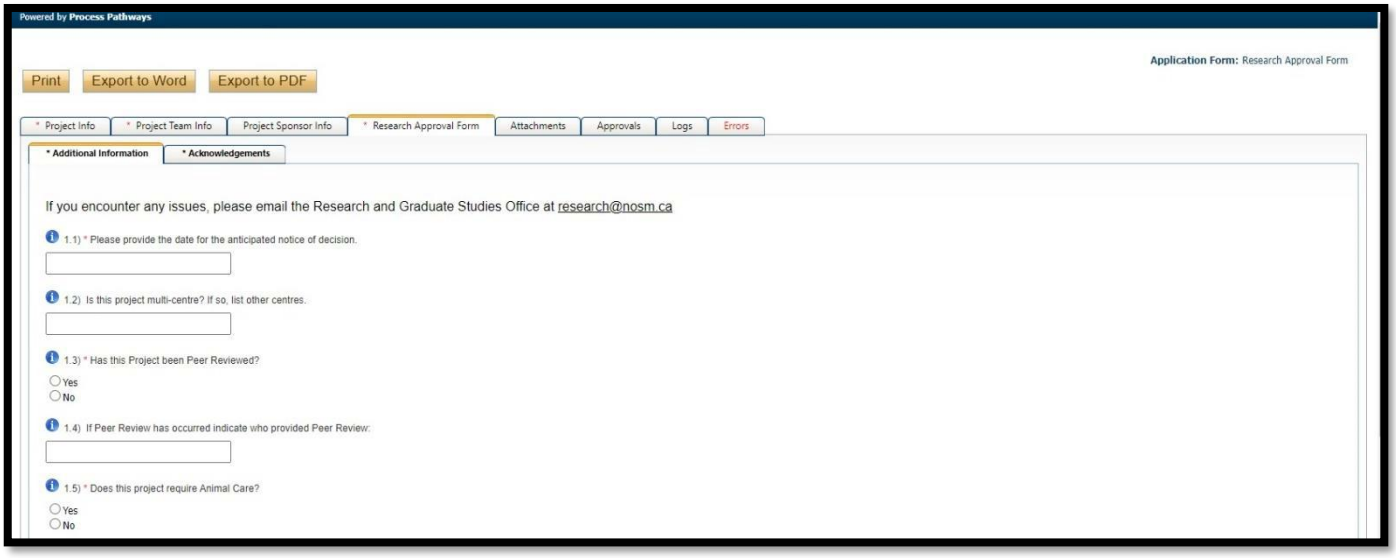
This tab is only found in **Awards applications**. It allows you to identify your project's funding and how it will be dispersed through the project's timeline. Complete this tab if you are registering funds from an external source.

To add a funding agency, click the **Add New** button and the Agency List will pop up. Click on the **Agency** button to select the appropriate Agency. Click on the **Program** drop down to select the appropriate Program. If the Funding Agency or Program is not listed, please email research@nosm.ca.

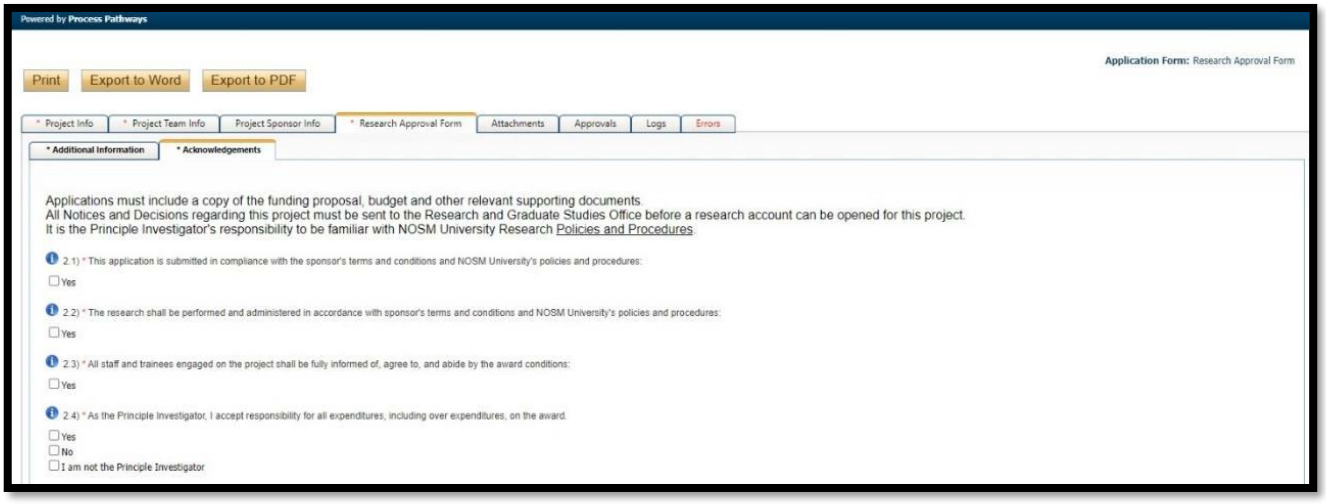


Research Approval Form Custom Tabs

In the Research Approval Form section, there are a series of mandatory custom questions from the Research Services Office. These questions are in the **Additional Information** tab.

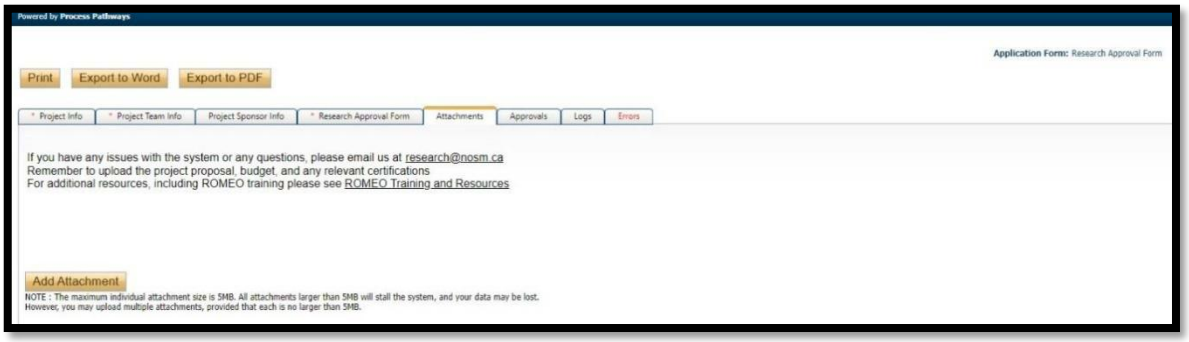


The second tab, **Acknowledgements**, is where you provide attestation to and acknowledgement of your rights and responsibilities as a researcher.



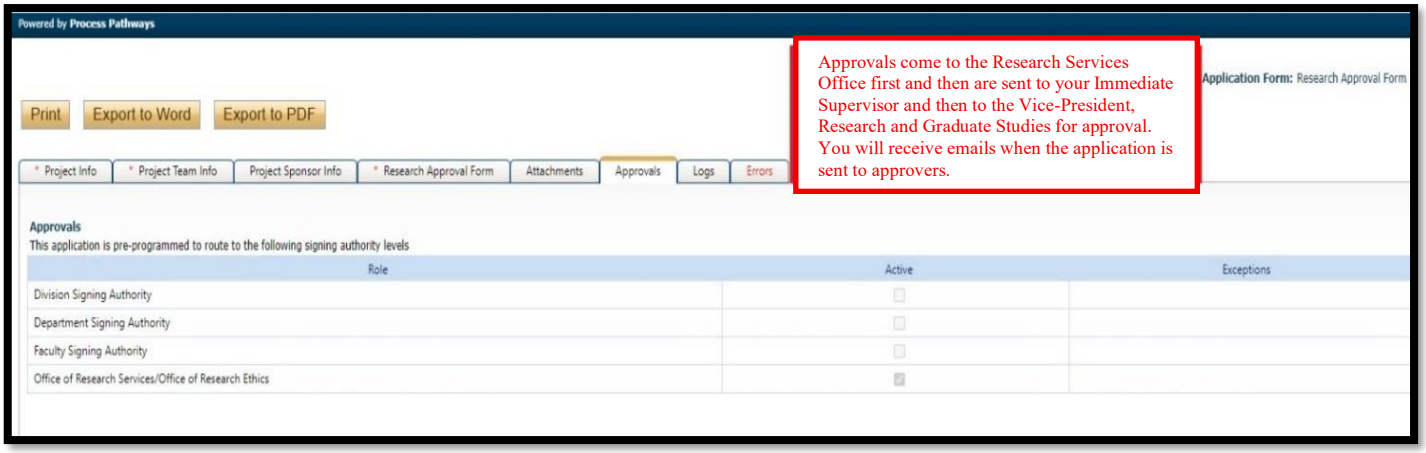
Attachments

All documents pertinent to your submission must be appended in the **Attachments** tab. This includes any documents referenced in the application. All submissions should have a full proposal and budget attached.



Approvals

Approvals follow the standard process of review and approval by your Immediate Supervisor and then review and approval by the Vice-President, Research and Graduate Studies. You will receive email notifications as the form is reviewed in the system.

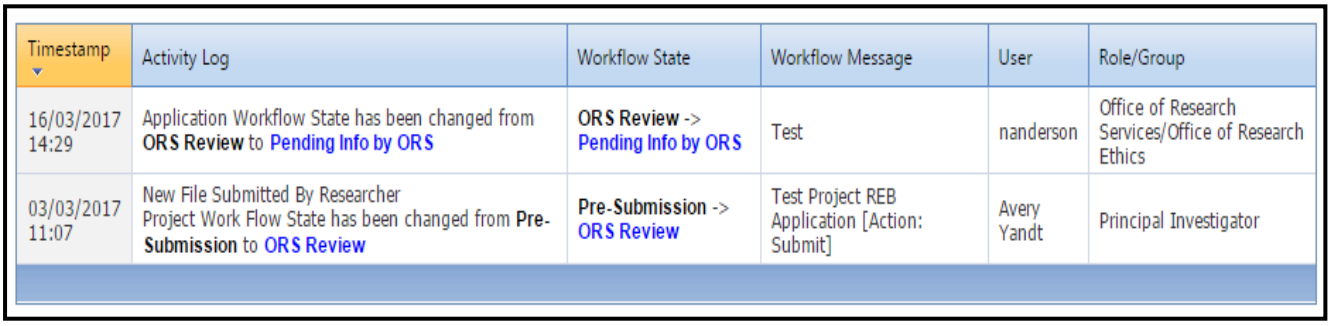


Logs

This page is divided into three sections: Application Workflow Log, Application Log, and Shared Communication.

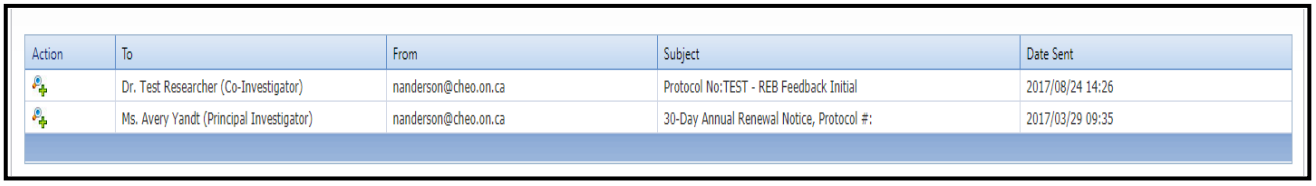
The **Application Workflow Log** outlines any changes in file workflow. Prior to submission this will remain blank.

The workflow message is where any information typed in the Comments box will appear.



Timestamp	Activity Log	Workflow State	Workflow Message	User	Role/Group
16/03/2017 14:29	Application Workflow State has been changed from **ORS Review** to Pending Info by ORS	**ORS Review** -> Pending Info by ORS	Test	nanderson	Office of Research Services/Office of Research Ethics
03/03/2017 11:07	New File Submitted By Researcher Project Work Flow State has been changed from **Pre-Submission** to ORS Review	**Pre-Submission** -> ORS Review	Test Project REB Application [Action: Submit]	Avery Yandt	Principal Investigator

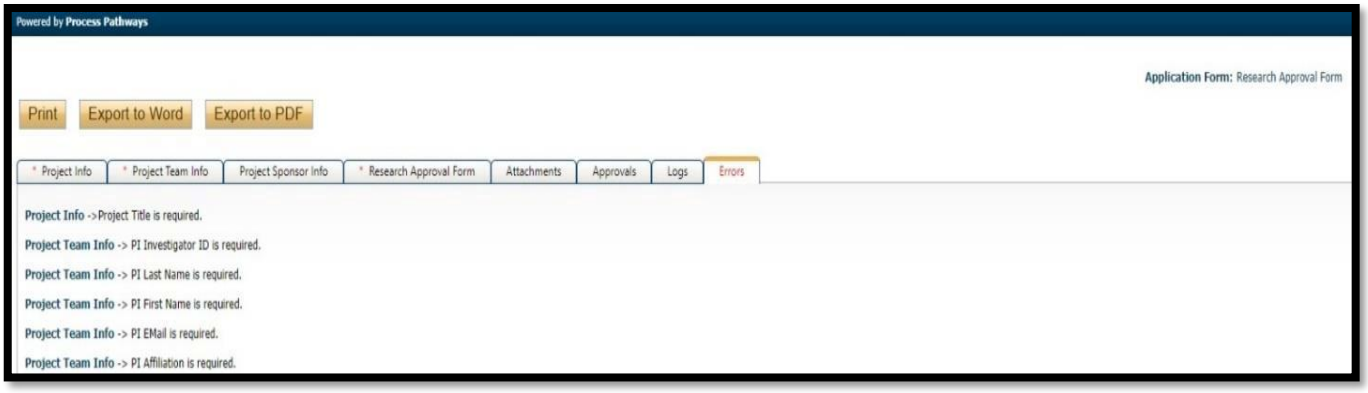
Shared Communications houses all emails sent to the research team through ROMEO. Click the magnifying glass to view or reprint the emails.



Action	To	From	Subject	Date Sent
	Dr. Test Researcher (Co-Investigator)	nanderson@cheo.on.ca	Protocol No:TEST - REB Feedback Initial	2017/08/24 14:26
	Ms. Avery Yandt (Principal Investigator)	nanderson@cheo.on.ca	30-Day Annual Renewal Notice, Protocol #:	2017/03/29 09:35

Errors

This is where you are notified of any required fields that have been left incomplete. Within this tab it will inform you of the location and questions that are incomplete. The tab will disappear once all the fields are complete, and you are ready to submit.



Submitting your Application

Once you have reviewed the content of your application and the Errors tab is no longer visible, you are ready to submit! **Only the PI will be able to submit an initial application.** If you are the PI and do not see the Submit button, please verify that you are appropriately listed in the Project Team Info tab.

A comment box will appear when you click Submit. Any information typed in this section will appear in the Workflow Message section of the Application Workflow Log. Type in your comment and click Submit.

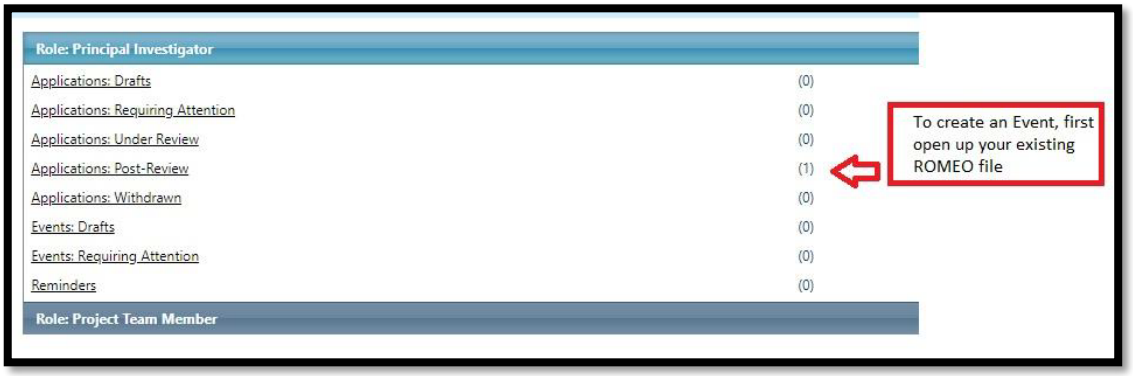
If you do not wish to add a comment, type any key and click Submit.

Once your application has been submitted, it will be routed to your Immediate Supervisor and then the Vice-President, Research and Graduate Studies. If revisions or clarifications are required, an email will be sent to you with the details of what is required. Once approved, you will receive an email notification. Post-Submission, the Research Services Office will add any appropriate reminders to your file and will be in contact with you if an action is required on your part. Please see the next section on Post-Submission for details.

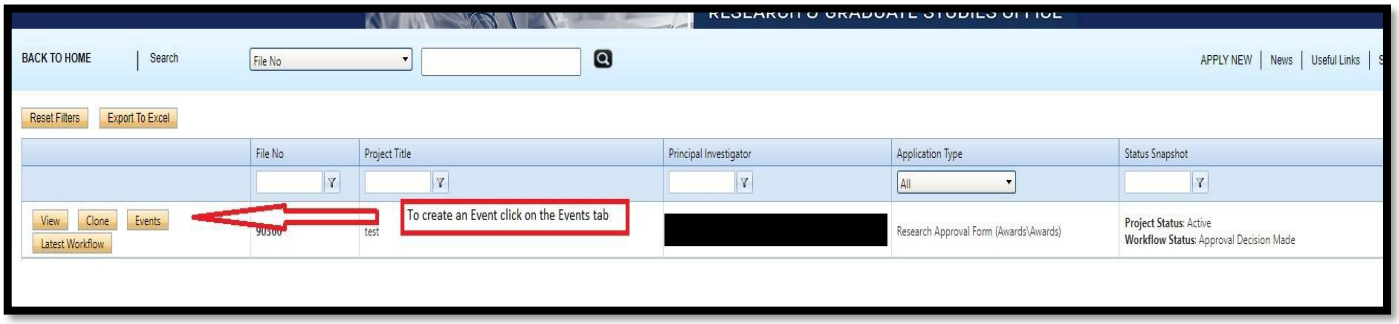
Post-Submission

How to submit an Event Form

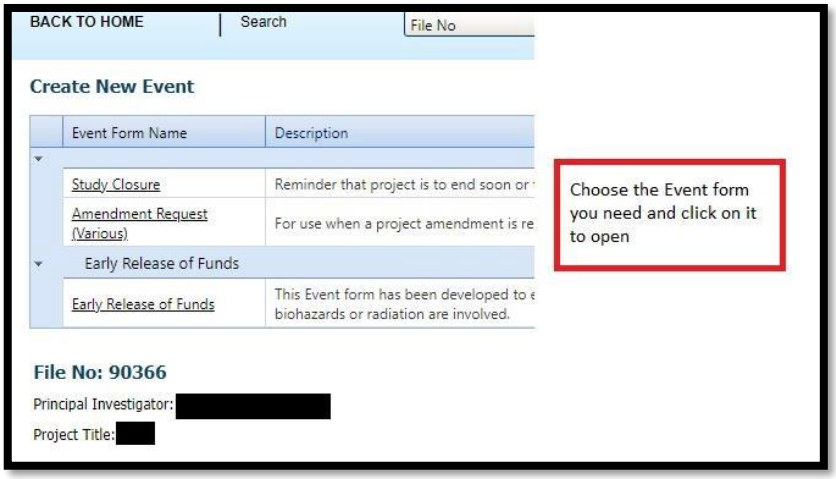
If you need to make an amendment to your application, submit a report, or request early release of funds, you will need to submit an Event form in ROMEO. To create an Event, first open your approved ROMEO file (please note that Event forms are only used for approved ROMEO applications and will only show up in your approved ROMEO files).



Once your ROMEO application is open, click on the Events tab to open the forms.



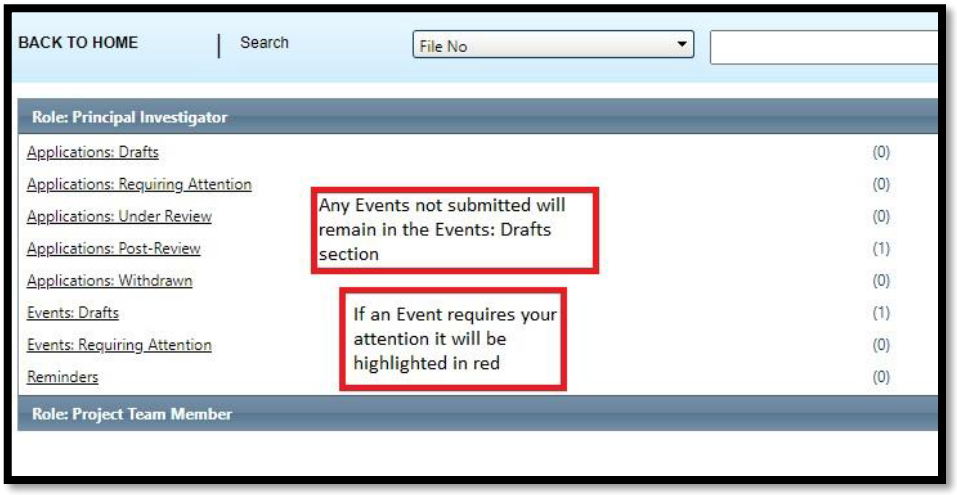
Select the Event Form required and click on it to open.



Event Form Approval Process

Once you have filled out the Event Form, click on submit. The Event form will be sent to the Research Services Office for review. You will be notified by email of any decision made regarding your event form.

Any Event forms not submitted will remain in your **Events: Drafts** section. If any Events require your attention, the **Events: Requiring Attention** section will be highlighted in red.



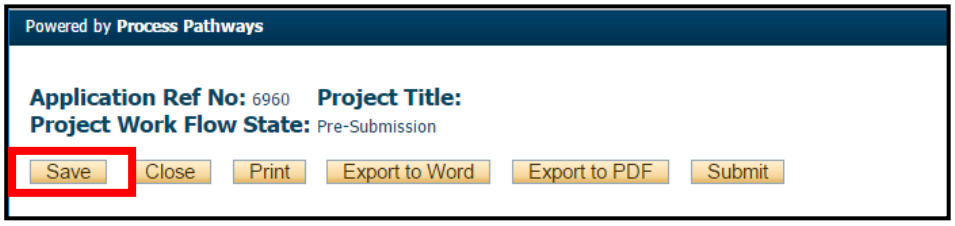
Reminders

If the Research Services Office requires you to provide information related to your ROMEO file, we will send you a Reminder. You will also receive an email letting you know that an action is required on your party. This could be updating us on the status of the project or providing a report. To view your reminders, login to ROMEO and the reminder section will be open and highlighted in red.

Helpful Hints

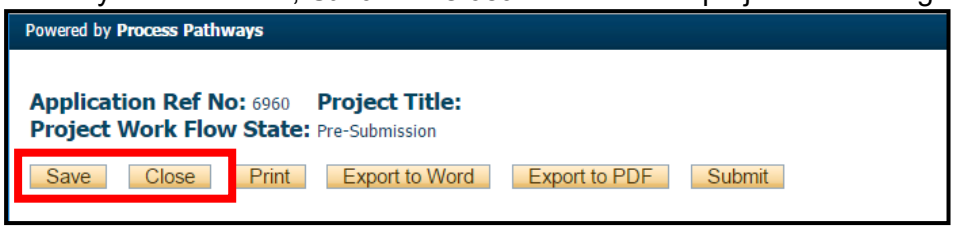
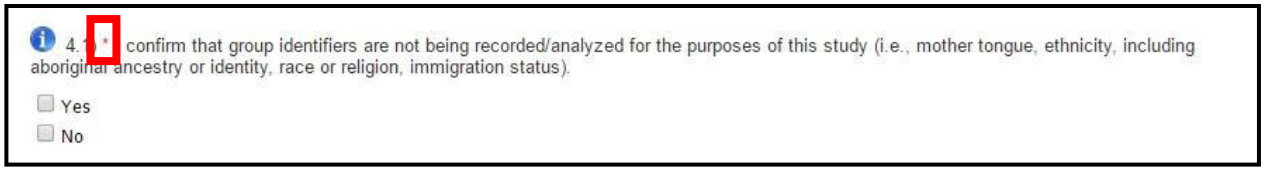
There are certain features and functionalities unique to ROMEO, some of which are listed below:

- Be sure to click *Save* repeatedly as you move through the various tabs of your application, as there is no auto-save feature, and the system will time out if left unattended.



- You can export any application either before or after submitting. For best functionality, export the document to Word and save with your files.

- Before you exit the file, *Save* and *Close* to ensure the project does not get locked.



- Any fields marked with a red asterisk are mandatory. Any unmarked are optional but should be completed if they apply to your submission.