Nipissing’s ROMEO e-System

Researcher User Manual for Research Ethics and Animal Care Forms
Accessing the Researcher’s Portal

- The Researcher’s Portal is available through the Research website at the following URL: [http://www.nipissingu.ca/academics/research-services/Pages/default.aspx](http://www.nipissingu.ca/academics/research-services/Pages/default.aspx)

- Click the ROMEO logo

- You will be directed to the ROMEO Researcher Portal Log in page
- Enter your user name (e-mail address) and password, click Login to log into the Researcher’s Portal
New Registration

- Nipissing students and external users, trying to log in for the first time, will need to complete the [Self Registration Form](#) before they can access the Researcher’s Portal. Click Register from the Log-in page and complete the information required and submit. You will receive an e-mail from romeoadmin@nipissingu.ca to complete the registration process.

- If you require further assistance, you can contact Dan St. Georges (ext 4644) or Martee Storms (ext 4055) in the Research Office.
You are now on the Researcher’s Home Page!

To access a New Application form, click on “APPLY NEW”
Select the Desired REB or ACC Form

Any research project funded or not involving human participants or animals must receive the appropriate committee approval before the project can start.
Tab # 1: Project Info Tab

Enter the project title, start and end date, as well as any keywords which describe your project.

**Note:** Keywords can be selected from the drop down menu or typed directly into the text box.
Tab #2: Project Team Info Tab

- Project Team Info tab is automatically populated with the researchers information
Adding Additional Project Team Members

- From the Project Team Info tab, scroll down to “Other Project Member Info” and click “Add New”

- Click “Search Profiles” to locate the other Team Members
Adding Project Team Members

- You can search the Investigator List for the name of the person to be assigned as team member. The list can be searched in a variety of ways, i.e. type the last name of the person in the “Last Name” field, use the filter beside it to select a search criteria such as “Equal To” or “Contains”.

- Once you have identified your team member – click on “select”. The project team member information will be updated automatically.

- If you are unable to identify the person you are looking for from the investigators list, please email romeoadmin@nipissingu.ca . Your email should include the person’s full name, title, business address and email address. You will be notified as soon as the person has been added to the investigator’s list and will then be able to add them to the project.
Adding Project Team Members

- From there, you may select the role of the team member from the “Role in Project” drop down menu. (**Important**: Student applications should always assign their supervisor(s) as team members and select “Faculty Supervisor” role)
Adding Project Team Members cont’d

- You may add as many team members as required by clicking “Add New”, team members can also be edited or deleted. Keep in mind that anyone who will need to have access to the application should be added as team members. However, only the P.I. and the Faculty Supervisor will be copied on all system generated email correspondence.

- **Important:** Although all team members will have access to view and edit the application, the P.I. is the only member of the project team who can submit the application once it is ready for REB/ACC review.
Tab #3: Protocol Form

All Section tabs of the Protocol Form must be completed

**IMPORTANT:** Please note that all fields preceded by a red asterisks (*) are required. Failing to complete these fields will prevent the applicant from submitting the form.
Attachments Tab

- Users may upload multiple attachments, such as Participant Information Letter, Questionnaires, Surveys etc., provided that each is no larger than 5MB. Attachments may be word files, spreadsheets, jpeg files, pdf’s, etc.

- Click Add Attachment
• Enter a Description, if applicable
• Click Browse to load the appropriate attachment.
• Enter the Version Date or select the appropriate date using the calendar tool
• Select the appropriate Doc / Agreement
• Click Add Attachment to upload the document.
The Errors tab keeps a log of any required questions that were left unanswered. If all required questions are answered, the Errors tab will disappear.
Save and Continue...

- At any point in the process, the applicant may “save” and “close” the application and complete it at a later date. The information entered will be saved and the user can access it again through their Researcher’s home page under “Application (Saved – Not Submitted)”.

- **Tip!!** Though ROMEO has no automatic *save* feature, it does have a *time out* feature! If you need to step away from your computer, you should always hit “Save” and “Close” as a precautionary measure. Failing to do so could result in information being lost and the application being “locked”. Contact romeoadmin@nipissingu.ca by email for support.
Submitting the Application

- Start by clicking the “Submit” button at the top of the screen to open the “Work Flow Action: screen

![Image of Work Flow Action screen]

- Enter a comment in the textbox provided. Comment can be a simple sentence (i.e. Submitting application for review).

![Image of comments section]

- Click on one of the two “Submit” buttons located at the top and the bottom of the “Work Flow Action” screen to submit your application for review.
Applications Under Review

- Once you have submitted the application for review, you will receive an email confirming the receipt of your application. At this stage you will be **unable** to make any changes to the application. However, it is still available for viewing under “Applications (Submitted – Under Review)”

- Click “Applications (Submitted – Under Review)” to see applications under review
• Click “View” on the specific application you want to view.

Then

• Click the “Logs” tab and select the “Workflow Log” button, this will show the state of your application.
Applications Requiring Revisions

- If the reviewer(s) require any clarifications, the applicant will receive an e-mail from romeoadmin@nipissingu.ca noting the areas that require attention. At this stage, you will be able to edit the application by clicking on the “Applications (Submitted – Requiring My Attention)”.
The “Logs” tab is a useful tool that allows the applicant, reviewer(s) and the Administrator to track the history of the application and communicate with one another. Text in blue font represents most recent updates.

- The “Workflow Log” tracks and time stamps approval and messages.
- The “Project Logs” tracks and time stamps every action taken on the application.
Approved Applications

- Once the application has been approved, the P.I. will receive a formal approval letter by email. The application can no longer be modified but is available for viewing under “Applications (Submitted – Post Review)”.
Need Assistance/Have a Question

- Should you require any assistance or have any questions please contact the ROMEO Administrator at romeoadmin@nipissingu.ca or Dan St. Georges (ext. 4644) or Martee Storms (ext. 4055).

Thank you!