ROMEO External Grants Checklist Guide

Research & Innovation Advancement

Contents

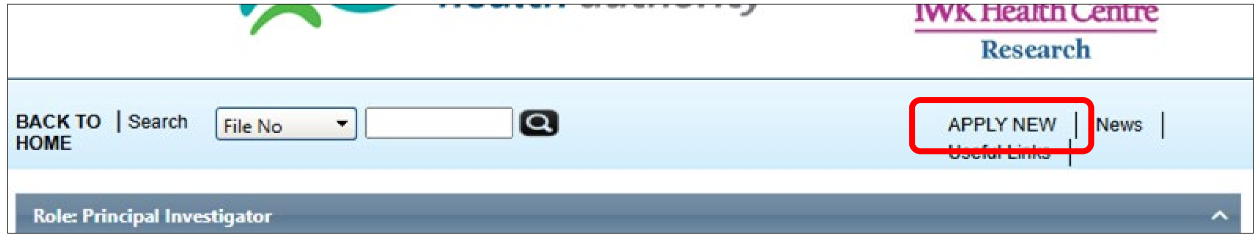
Login Information

ROMEO portal registration/ Login Information: Link to ROMEO portal here. For any login issues, contact: research@iwk.nshealth.ca

If you are a *new Investigator* and require a profile to gain access to ROMEO, please complete a registration request for either the IWK or NS Health (*choose your primary affiliation. Only one Investigator Profile is required as the IWK and NS Health share the ROMEO database.**)**

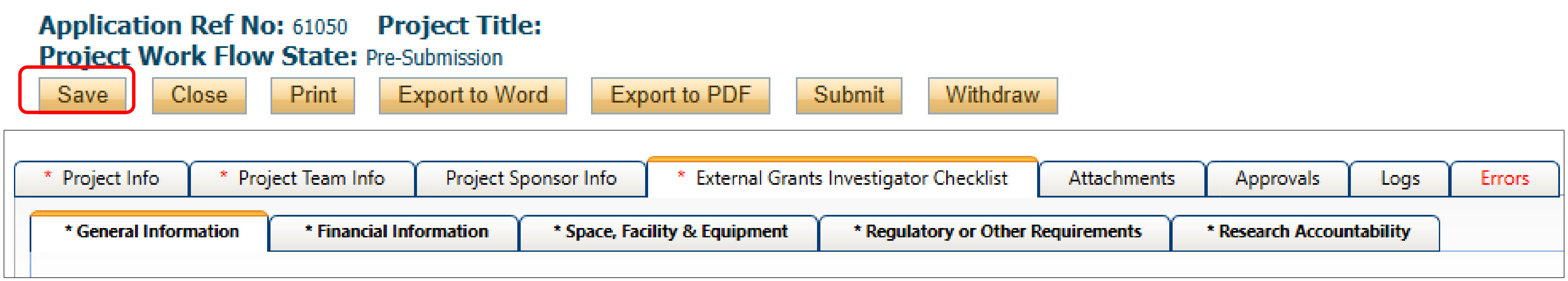
Purpose of the form: Researchers are requested to complete this form when they submit a grant application to an external funder and anticipate that they will or might receive new funds that will be held at the IWK.

On the right side of the homepage > click ‘APPLY NEW’



Under IWK- Awards and Clinical Trials > select ‘External Grants Checklist’

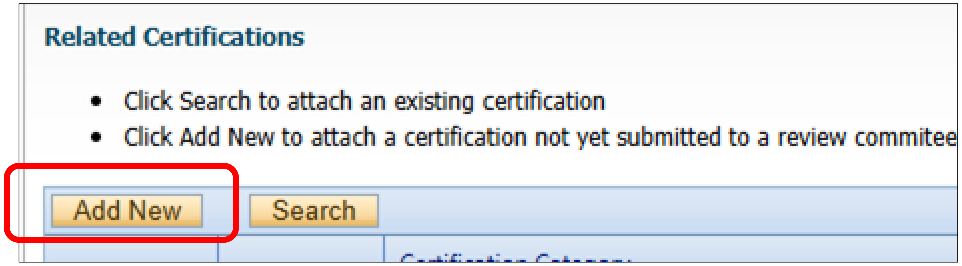
The form has a **series of tabs**. Please ensure all questions have been answered accordingly. The questions with red asterisk are mandatory, the form cannot be submitted unless the mandatory questions have been answered. Check the ‘Errors’ for incomplete fields. The portal does not have auto-save feature, and it is recommended to click **Save** at regular intervals.



Project Info

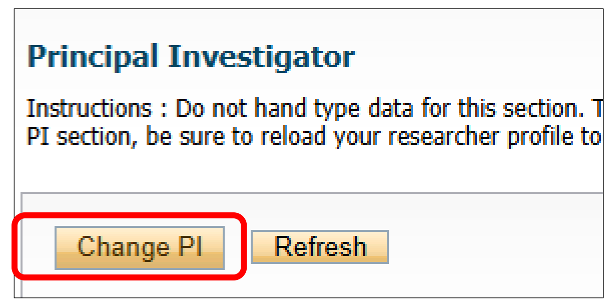
Please enter the basic details of the project- Study title, anticipated start and end dates can be left empty if not sure), and Certifications (if applicable).

Use the ‘search’ function to generate a list of PI’s human or animal ethics in the system.

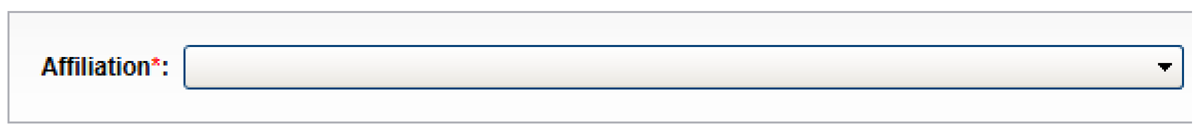


Project Team Info

NOTE: The PI section default populates with the data of the team member who creates the file. If you are not the PI, click the **Change PI button** to search for and select an PI profile. If you load an alternate researcher profile to the PI section, be sure to reload your researcher profile to the Other Project Team Info section below.



Click the **‘Affiliation’** drop-down box to select the appropriate IWK Department to which the application should be routed for Departmental Chief approval.



To **add other team members** to the project

> Click 'Add New'

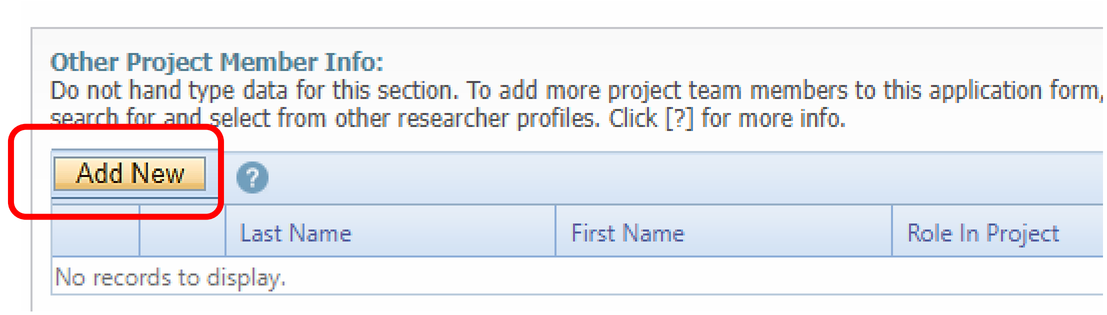
> 'Search Profiles'

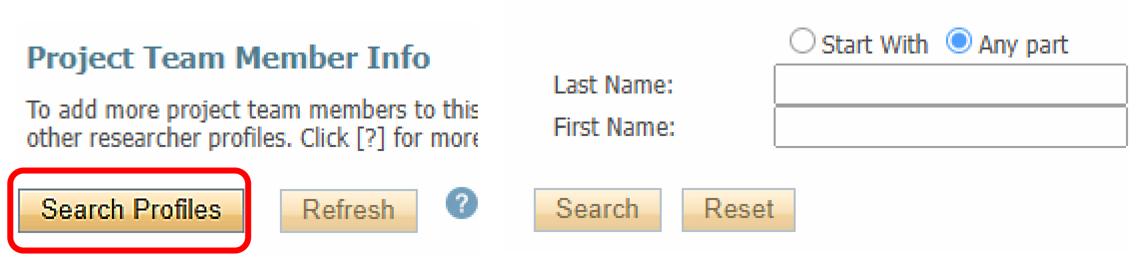
> enter team members Last/First name

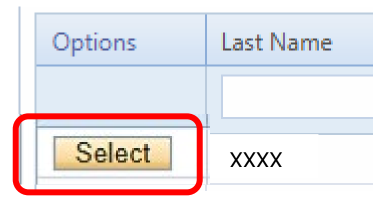
> Select the team member profile

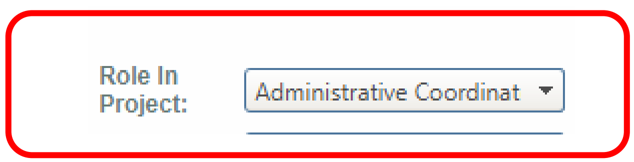
> determine their 'Role in Project'

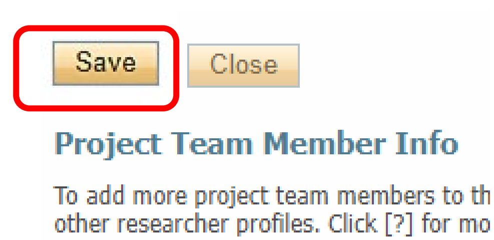
> Click Save button.











Project Sponsor

Funding Agency details are to be provided here:

> Click ‘Add New’

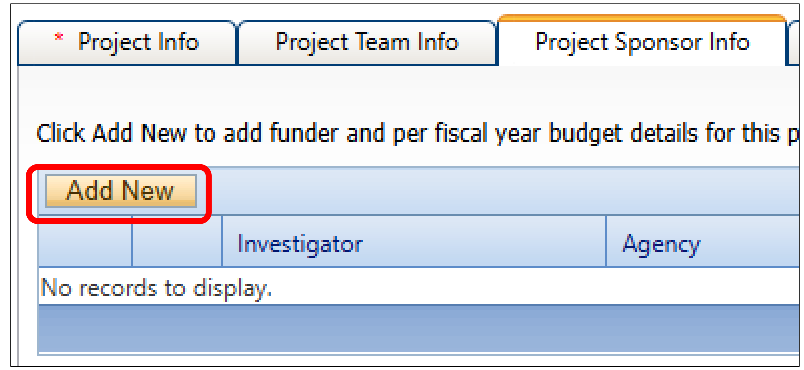
> Click ‘Agency’

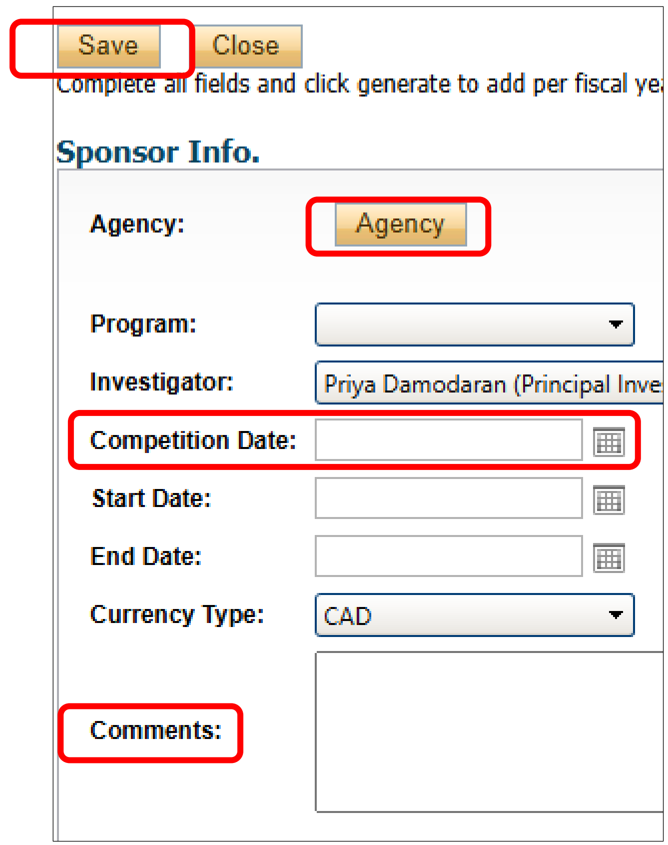
> Search Agency name or abbreviation

> Select the Agency, if the agency is not listed type the agency name in the Comments box below.

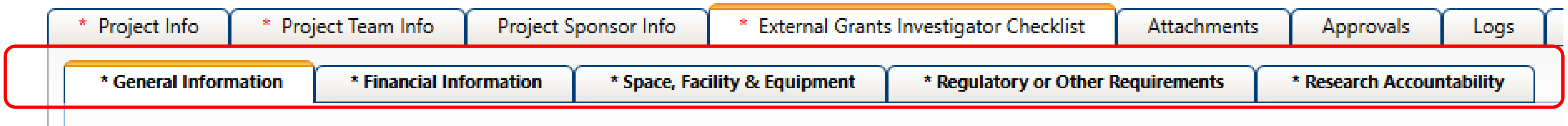
> If applicable, enter the Competition Date (Funder deadline).

> Click ‘Save’



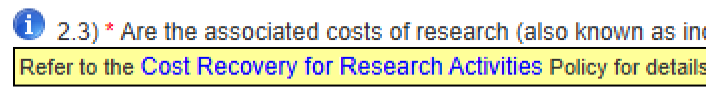


External Grants Investigator Checklist



Make sure to go through the tabs one by one. The questions with red asterisk are mandatory, the form cannot be submitted unless the mandatory questions have been answered.

NOTE: Blue text denotes policies that are linked for your references. Click on the blue text to read the policy.



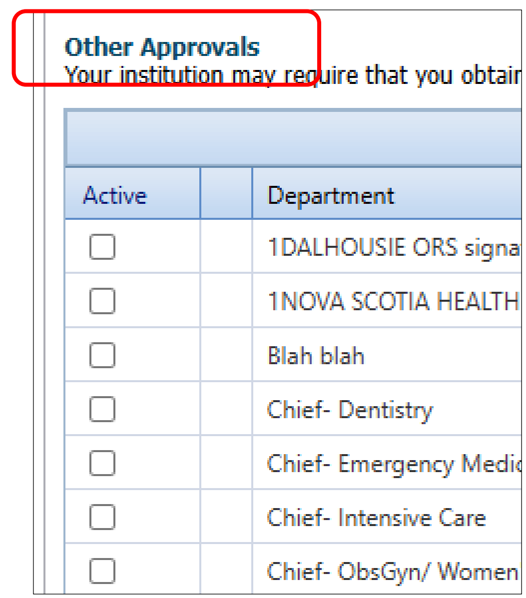
Attachments

Upload all relevant documentations related to the submission. More information available on the tab.

Approvals

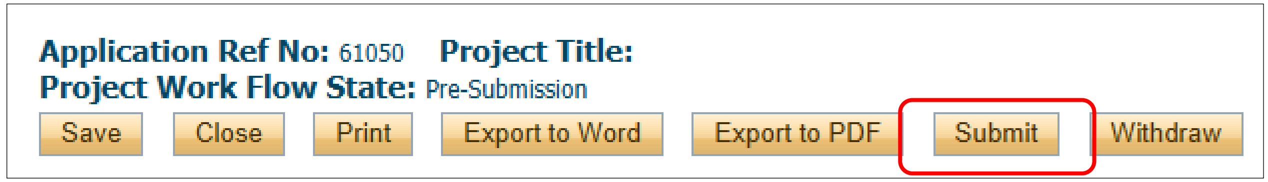
All applications are to be approved by the **PI's affiliated IWK Department** Heads. If the project utilizes resources (e.g. space, facilities, equipment, data) at **NSH or Dalhousie**, the checklist will require approval by the relevant institution.

The 'Other Approvals' section will display a list of signatories from IWK Departments and other institutions. Select the box next to the name of the relevant approver.



Submission

Once the form is ready for submission, click **'Submit'** button. **NOTE:** Only the PI can see the submit button. The submit button won't appear on the team member profile.

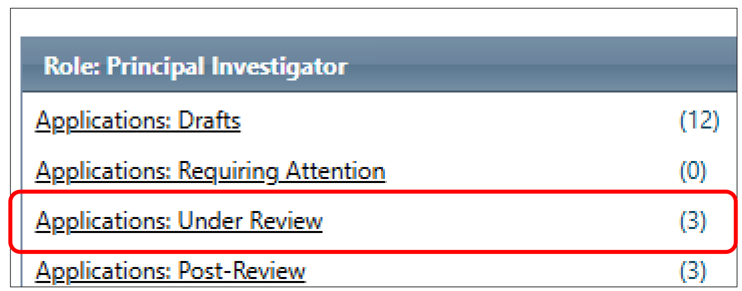


A pop-up box will appear. Any comments/notes that needs to be shared with the signing authorities or the RIA administrators can be added.

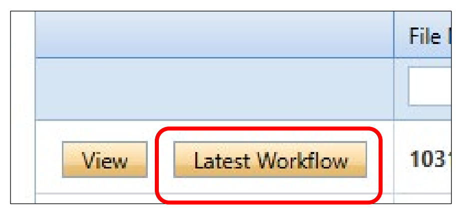
Click **'Submit'** again.

IWK RIA Approval/ Revisions

Once the application is submitted, the file will be available for view under **'Application: Under Review'.** If the PI wants to make changes after submission, the signing authority or RIA administrators can return the application for revision.



Clicking on the 'Latest Workflow' will display a status snapshot of where the application is currently sitting.



The PI will receive an email if RIA requires revisions or clarifications on their application.

> The application will be under 'Applications: Requiring Attention'

> Click 'Latest workflow'

> Check for any messages from the RIA administrator.

> Make the required changes and Re-submit the application.