

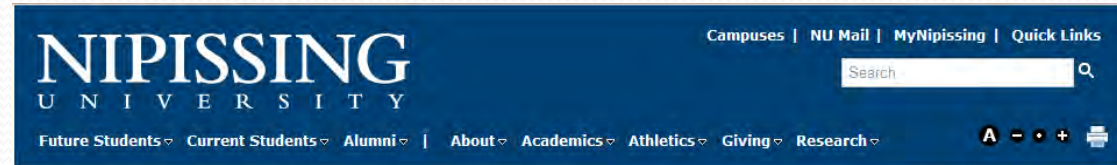


# Nipissing's ROMEEO e-System

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>



- Click the ROMEO logo



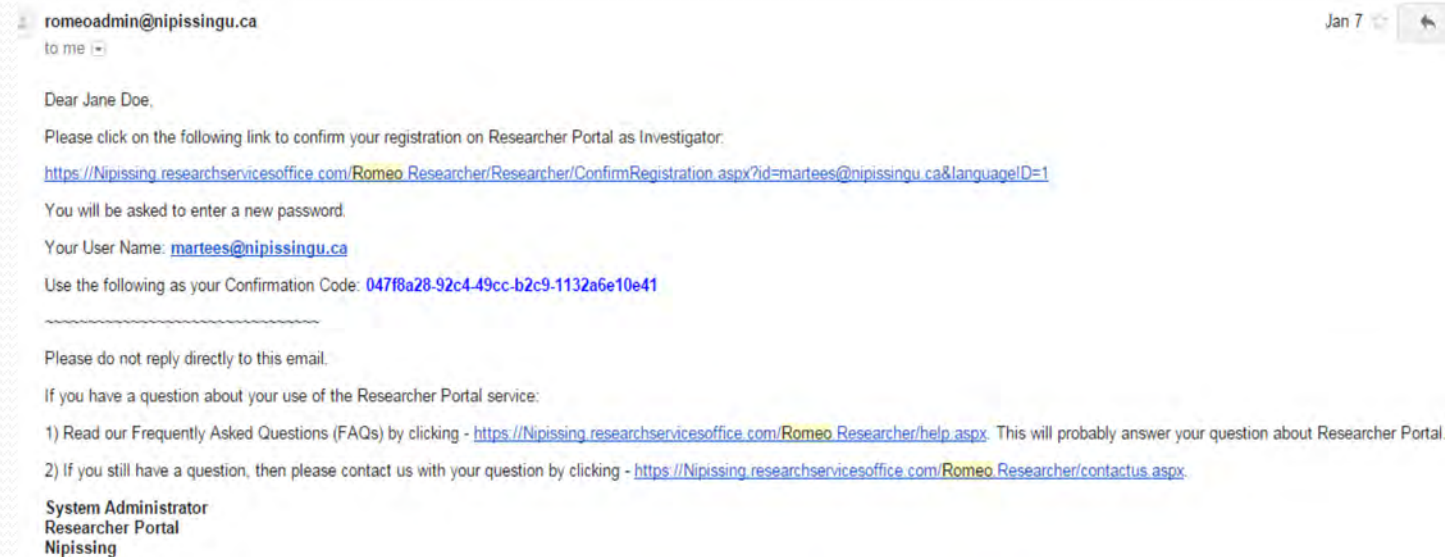
- You will be directed to the ROMEO Researcher Portal Log in page

A login form with a light blue border. At the top right, it says "Login" with a blue circular arrow icon. Below this are two input fields: "Username" and "Password". At the bottom, there are three buttons: "Login", "Register", and "Reset Password". A red arrow points to the "Login" button.

- 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.



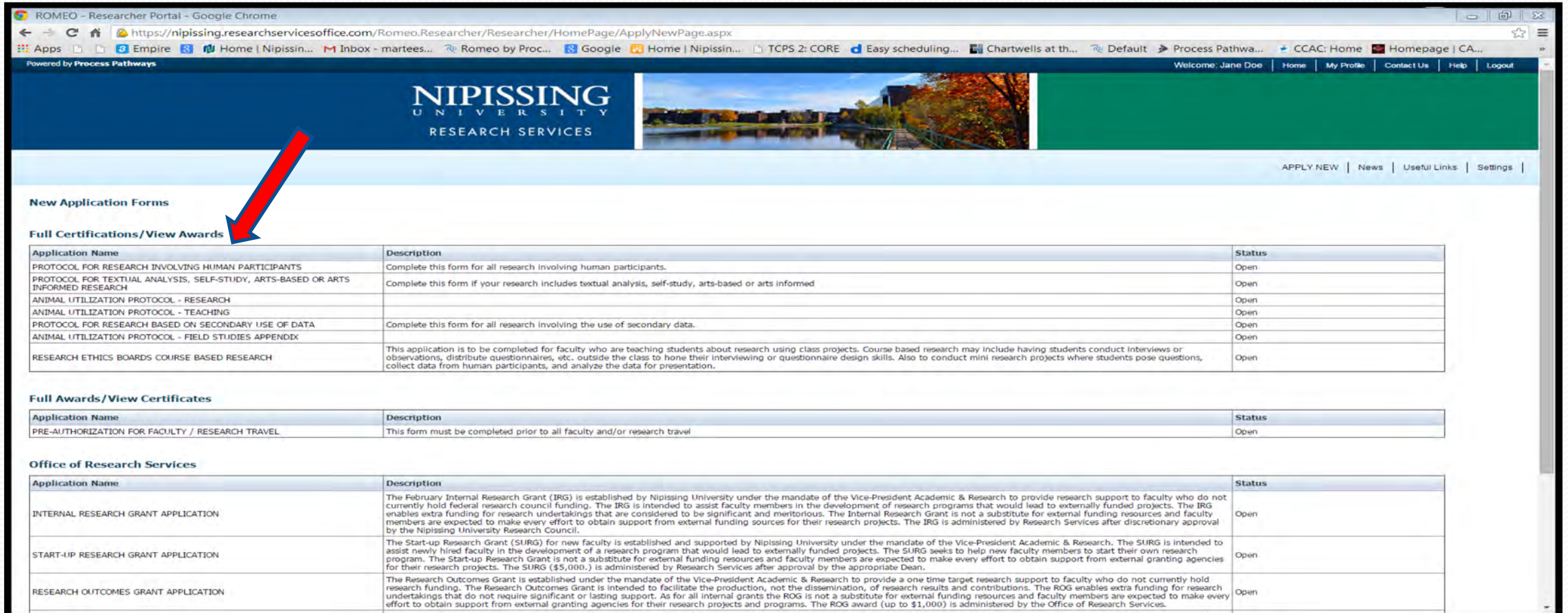
- If you require further assistance, you can contact Dan St. Georges (ext 4644) or Martee Storms (ext 4055) in the Research Office.

# You are now on the Researcher's Home Page!

To access a New Application form, click on "APPLY NEW"

The screenshot shows a web browser window displaying the Nipissing University Research Services Researcher's Home Page. The browser's address bar shows the URL: <https://nipissing.researchservicesoffice.com/Romeo.Researcher/Researcher/HomePage/HomePage.aspx>. The page header includes the Nipissing University Research Services logo and a navigation bar with the following links: [Welcome: Jane Doe](#), [Home](#), [My Profile](#), [Contact Us](#), [Help](#), and [Logout](#). A red arrow points to the [APPLY NEW](#) link in the navigation bar. The main content area is divided into two columns. The left column is for a Principal Investigator and the right column is for a Project Team Member. Both columns show application status counts: Applications (Saved - Not Submitted) (0), Applications (Submitted - Requiring My Attention) (0), My Reminders (0), Applications (Submitted - Under Review) [Click here...], Applications (Submitted - Post Review) [Click here...], and Applications (Withdrawn) [Click here...].

# Select the Desired REB or ACC Form



The screenshot shows the Nipissing University Research Services website. The header includes the university logo and navigation links. A red arrow points to the 'Full Certifications/View Awards' section. Below this are three tables listing application forms with their descriptions and statuses.

**New Application Forms**

**Full Certifications/View Awards**

Application Name	Description	Status
PROTOCOL FOR RESEARCH INVOLVING HUMAN PARTICIPANTS	Complete this form for all research involving human participants.	Open
PROTOCOL FOR TEXTUAL ANALYSIS, SELF-STUDY, ARTS-BASED OR ARTS INFORMED RESEARCH	Complete this form if your research includes textual analysis, self-study, arts-based or arts informed	Open
ANIMAL UTILIZATION PROTOCOL - RESEARCH		Open
ANIMAL UTILIZATION PROTOCOL - TEACHING		Open
PROTOCOL FOR RESEARCH BASED ON SECONDARY USE OF DATA	Complete this form for all research involving the use of secondary data.	Open
ANIMAL UTILIZATION PROTOCOL - FIELD STUDIES APPENDIX		Open
RESEARCH ETHICS BOARDS COURSE BASED RESEARCH	This application is to be completed for faculty who are teaching students about research using class projects. Course based research may include having students conduct interviews or observations, distribute questionnaires, etc. outside the class to hone their interviewing or questionnaire design skills. Also to conduct mini research projects where students pose questions, collect data from human participants, and analyze the data for presentation.	Open

**Full Awards/View Certificates**

Application Name	Description	Status
PRE-AUTHORIZATION FOR FACULTY / RESEARCH TRAVEL	This form must be completed prior to all faculty and/or research travel	Open

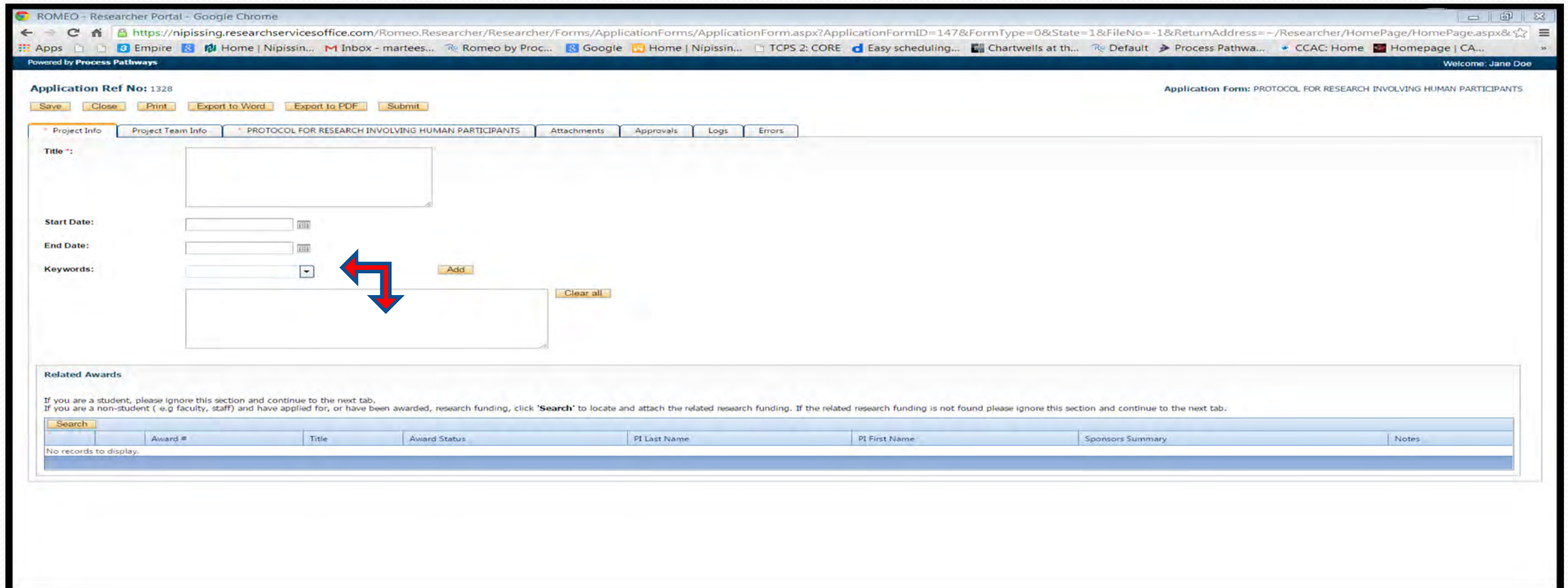
**Office of Research Services**

Application Name	Description	Status
INTERNAL RESEARCH GRANT APPLICATION	The February Internal Research Grant (IRG) is established by Nipissing University under the mandate of the Vice-President Academic & Research to provide research support to faculty who do not currently hold federal research council funding. The IRG is intended to assist faculty members in the development of research programs that would lead to externally funded projects. The IRG enables extra funding for research undertakings that are considered to be significant and meritorious. The Internal Research Grant is not a substitute for external funding resources and faculty members are expected to make every effort to obtain support from external funding sources for their research projects. The IRG is administered by Research Services after discretionary approval by the Nipissing University Research Council.	Open
START-UP RESEARCH GRANT APPLICATION	The Start-up Research Grant (SURG) for new faculty is established and supported by Nipissing University under the mandate of the Vice-President Academic & Research. The SURG is intended to assist newly hired faculty in the development of a research program that would lead to externally funded projects. The SURG seeks to help new faculty members to start their own research program. The Start-up Research Grant is not a substitute for external funding resources and faculty members are expected to make every effort to obtain support from external granting agencies for their research projects. The SURG (\$5,000.) is administered by Research Services after approval by the appropriate Dean.	Open
RESEARCH OUTCOMES GRANT APPLICATION	The Research Outcomes Grant is established under the mandate of the Vice-President Academic & Research to provide a one time target research support to faculty who do not currently hold research funding. The Research Outcomes Grant is intended to facilitate the production, not the dissemination, of research results and contributions. The ROG enables extra funding for research undertakings that do not require significant or lasting support. As for all internal grants the ROG is not a substitute for external funding resources and faculty members are expected to make every effort to obtain support from external granting agencies for their research projects and programs. The ROG award (up to \$1,000) is administered by the Office of Research Services.	Open

# 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.



The screenshot displays the ROMEO Researcher Portal interface. The browser address bar shows the URL: <https://nipissing.researchservicesoffice.com/Romeo.Researcher/Researcher/Forms/ApplicationForms/ApplicationForm.aspx?ApplicationFormID=147&FormType=0&State=1&FileNo=-1&ReturnAddress=-/Researcher/HomePage/HomePage.aspx&>. The page title is "ROME0 - Researcher Portal - Google Chrome". The application is titled "Application Form: PROTOCOL FOR RESEARCH INVOLVING HUMAN PARTICIPANTS". The application reference number is 1328. The user is logged in as Jane Doe. The "Project Info" tab is active, showing fields for Title, Start Date, End Date, and Keywords. A red arrow points to the Keywords section, highlighting the "Add" button and the text input field. Below the form is a "Related Awards" section with a search button and a table with columns: Award #, Title, Award Status, PI Last Name, PI First Name, Sponsors Summary, and Notes. The table currently shows "No records to display."

# Tab #2: Project Team Info Tab

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

Application Ref No: 1328 Project Title: Test  
Project Work Flow State: Pre Submission

Application Form: PROTOCOL FOR RESEARCH INVOLVING HUMAN PARTICIPANTS

Save Close Print Export to Word Export to PDF Submit

Project Info Project Team Info PROTOCOL FOR RESEARCH INVOLVING HUMAN PARTICIPANTS Attachments Approvals Logs

### Principal Investigator

Instructions : Do not hand type data for this section. The Principal Investigator (PI) section default populates with the researcher profile data for the project team member who creates the file. If you are not the PI, click the Change PI button to search for and select an alternate researcher 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.

Change PI Refresh

Prefix: Mrs. Last Name\*: Doe First Name\*: Jane

Affiliation\*: Faculty of Applied and Professional Studies\Muskoka

Rank: Administration Gender: Female Institution: Nipissing University

Phone1: Phone2: Email\*: marfees@nipissingu.ca Fax: Alternate Address: Primary Address: Country: Canada

Preferred Address:  Primary Address  Alternate Address

Comments:



# Adding Additional Project Team Members

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



**Other Project Member Info:**  
Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Add New button to search for and select from other researcher profiles.

	Last Name	First Name	Role In Project
No records to display.			

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



**Project Team Member Edit**

**Project Team Member Info**  
Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Search Profiles button to search for and select from researcher profiles.

Prefix:  Last Name:  First Name:

Affiliation:

Gender:

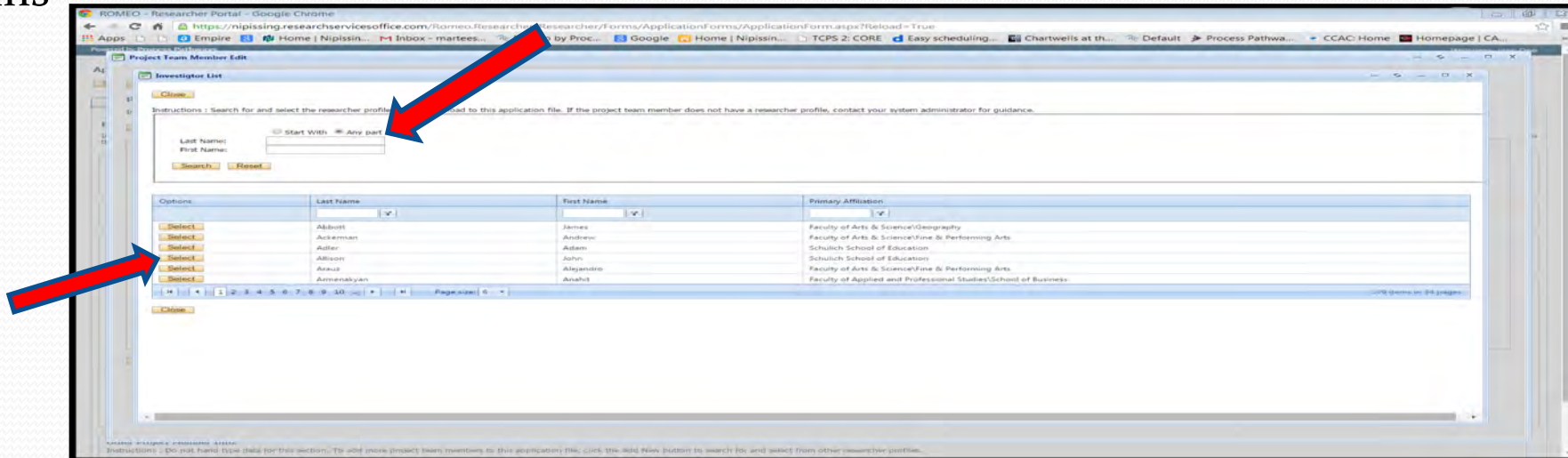
Role In Project:  Country:

Rank:  Institution:

Email:  Fax:

# 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](mailto: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)

**Project Team Member Info**

Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Search Pr

Prefix:  Last Name:

Affiliation:

Gender:

Role In Project:

Rank:

Email:

Phone1:

Mailing Address:

Use Of Address:  Primary Address  Alternate Address

# 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.

ROMEO - Researcher Portal - Google Chrome  
https://nipissing.researchservicesoffice.com/Romeo.Researcher/Researcher/Forms/ApplicationForms/ApplicationForm.aspx?Reload=True

Powered by Process Pathways

Application Ref No: 1328 Project Title: Test  
Project Work Flow State: Pre Submission

Application Form: PROTOCOL FOR RESEARCH INVOLVING HUMAN PARTICIPANTS

Welcome Jane Doe

Save Close Print Export to Word Export to PDF Submit

Project Info Project Team Info **PROTOCOL FOR RESEARCH INVOLVING HUMAN PARTICIPANTS** Attachments Approvals Logs

SECTION 1: APPLICANT (Principal Investigator) SECTION 2: FUNDING SECTION 3: OTHER APPROVALS SECTION 4: DESCRIPTION OF PROPOSED RESEARCH SECTION 5: PARTICIPANTS SECTION 6: PROCEDURES SECTION 7: RECRUITMENT SECTION 8: REMUNERATION/INCENTIVES  
SECTION 9: RISKS/BENEFITS SECTION 10: PRIVACY, CONFIDENTIALITY AND ANONYMITY SECTION 11: DATA SECTION 12: PARTICIPANT FEEDBACK/DISSEMINATION SECTION 13: SUBSEQUENT USE OF DATA

**THE ONLINE TUTORIAL IS A REQUIREMENT AND MUST BE COMPLETED PRIOR TO SUBMISSION - SEE USEFUL LINKS.**

1.1) \* Proof of Completion  
 Yes - I have attached my Certificate of Completion

1.2) In the case of student research, faculty supervisors must provide proof of completion:  
 Yes - I have attached my Certification of Completion

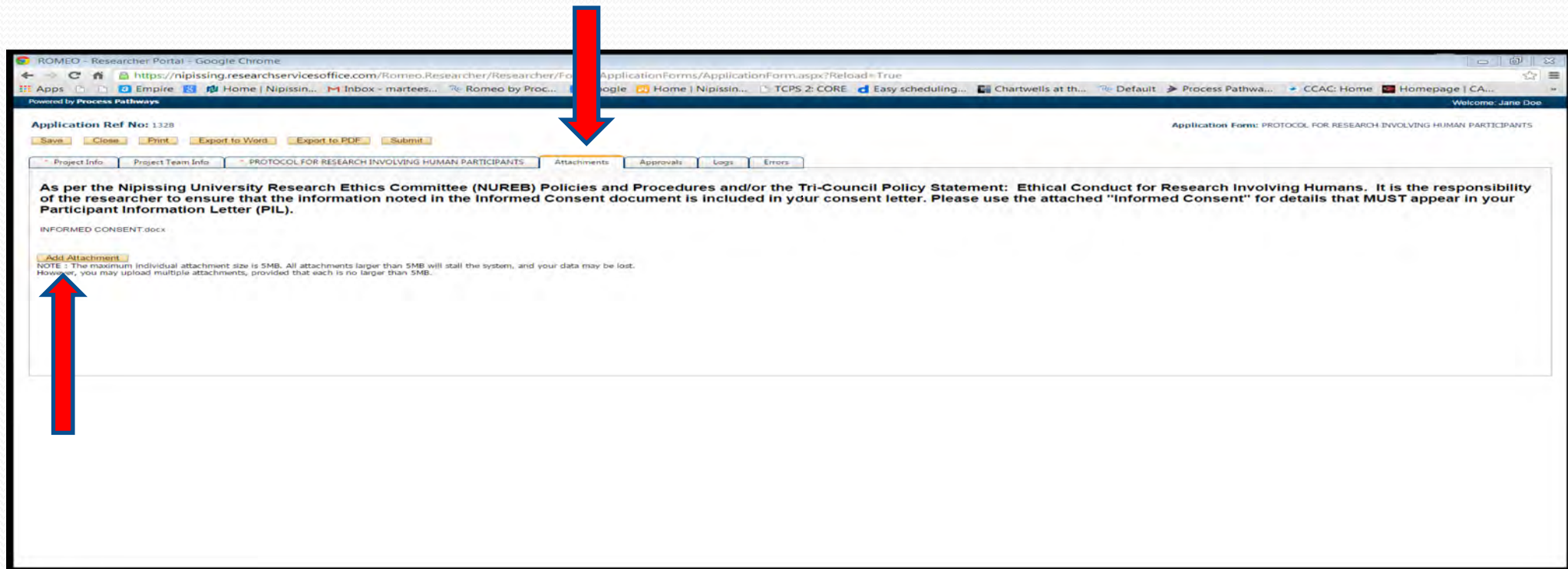
1.3) Please choose one of the following that pertains to you:  
Faculty Researcher

1.4) \* Does your research involve Aboriginal communities/peoples/institutions?  
 Yes - Please answer the 'Critical Questions Below'  
 No - Please proceed to the Funding Tab

1.5) Critical Question #1. If the proposed research is likely to affect the welfare of Aboriginal community/communities to which prospective participants belong, how will you or seek engagement with the community/communities (see TCPS2 Articles 9.1, 9.2 and 9.10)?

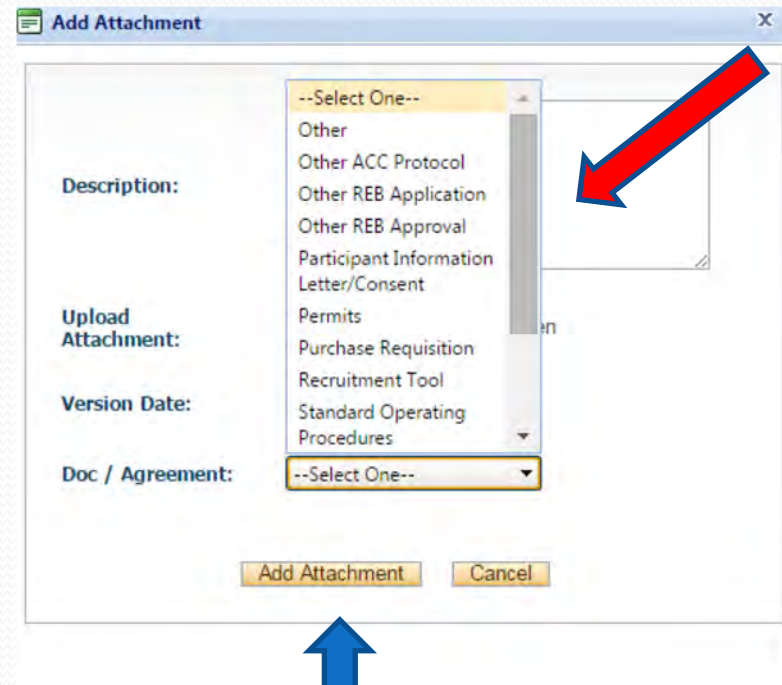
# Attachments Tab

- 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 screenshot shows a software dialog box titled "Add Attachment". It contains several input fields: "Description:", "Upload Attachment:", "Version Date:", and "Doc / Agreement:". The "Doc / Agreement:" field has a dropdown menu open, displaying a list of options: "--Select One--", "Other", "Other ACC Protocol", "Other REB Application", "Other REB Approval", "Participant Information Letter/Consent", "Permits", "Purchase Requisition", "Recruitment Tool", "Standard Operating Procedures", and "--Select One--". A red arrow points to the dropdown menu, and a blue arrow points to the "Add Attachment" button at the bottom of the dialog.

# Errors Tab

- 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.

Powered by Process Pathways

Application Ref No: 1328 Project Title: Test  
Project Work Flow State: Pre Submission

Save Close Print Export to Word Export to PDF Submit

Project Info Project Team Info **PROTOCOL FOR RESEARCH INVOLVING HUMAN PARTICIPANTS** Attachments Approvals Logs Errors

PROTOCOL FOR RESEARCH INVOLVING HUMAN PARTICIPANTS -> SECTION 4: DESCRIPTION OF PROPOSED RESEARCH:4.1 Briefly describe, in non-technical layperson's terms, the purpose for the purposed project (no more than two sentences): is required.



# 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)”.



Powered by Process Pathways

Application Ref No: 1328 Project Title: Test  
Project Work Flow State: Pre Submission

Save Close Print Export to Word Export to PDF Submit

Project Info Project Team Info PROTOCOL FOR RESEARCH INVOLVING HUMAN PARTICIPANTS Attach

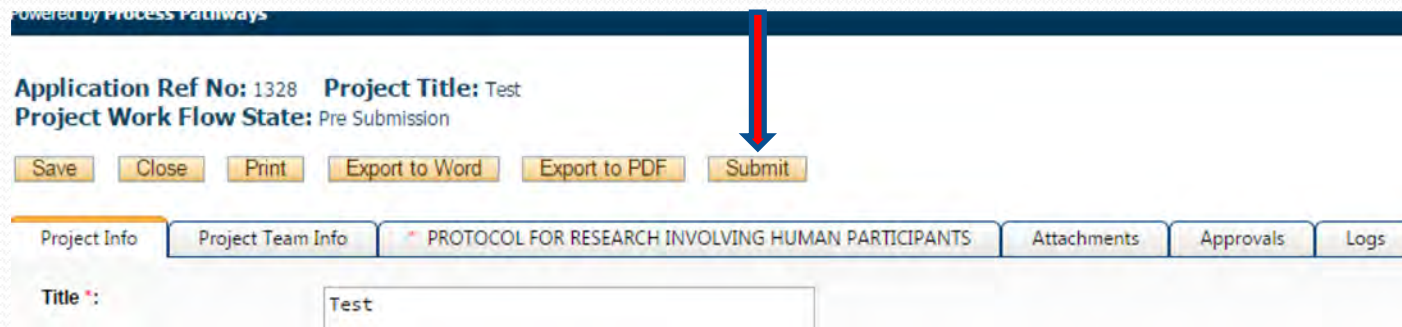
SECTION 1: APPLICANT (Principal Investigator) SECTION 2: FUNDING SECTION 3: OTHER APPROVALS

SECTION 9: RISKS/BENEFITS SECTION 10: PRIVACY, CONFIDENTIALITY AND ANONYMITY SECTION 11: DAT

- **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](mailto: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



powered by Process Pathways

Application Ref No: 1328 Project Title: Test  
Project Work Flow State: Pre Submission

Save Close Print Export to Word Export to PDF Submit

Project Info Project Team Info \* PROTOCOL FOR RESEARCH INVOLVING HUMAN PARTICIPANTS Attachments Approvals Logs

Title \*: Test

A red arrow points to the 'Submit' button in the top right corner of the main application screen.

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



Work Flow Action

Submit Cancel

Comments:

☺

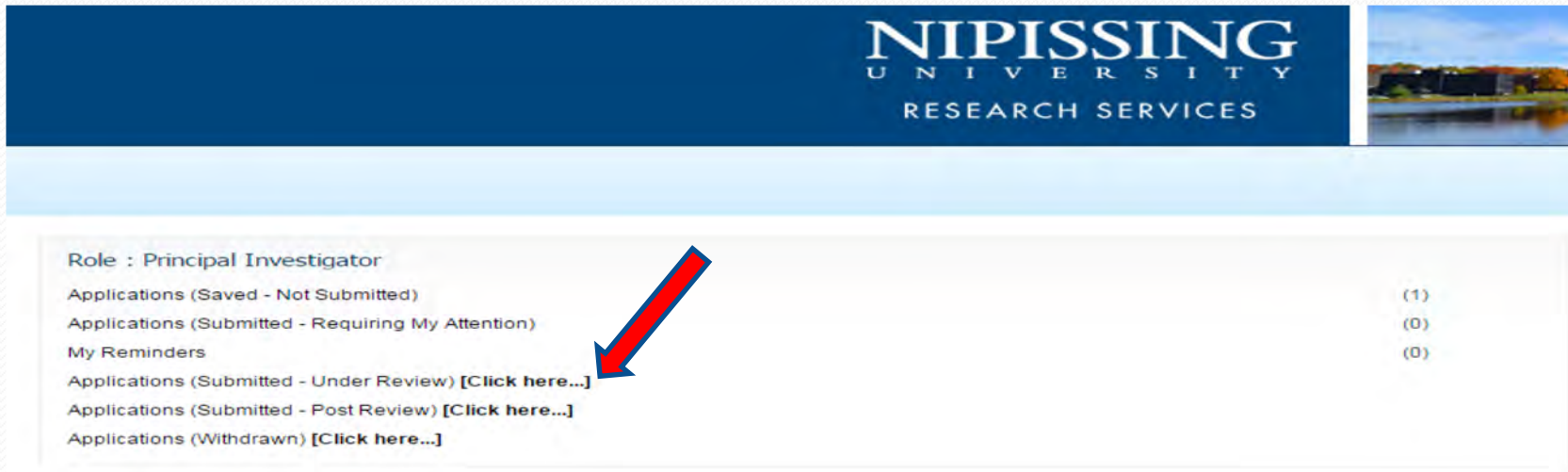
Submit Cancel

A red arrow points to the 'Submit' button at the top of the dialog box. Another red arrow points to the 'Submit' button at the bottom of the dialog box.

- 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

Reset Filters Export To Excel

	File No	Project Title	Principal Investigator	Application Type	Status Snapshot	Workflow Message
	<input type="text"/>	<input type="text"/>	<input type="text"/>	All	<input type="text"/>	
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Delete</a>	Ref No :1328	Test	Mrs. Jane Doe (Faculty of Applied and Professional Studies\Muskoka)	PROTOCOL FOR RESEARCH INVOLVING HUMAN PARTICIPANTS (Certification\Human Ethics)	<b>Project Status:</b> Pending <b>Workflow Status:</b> Pre Submission <b>Last Saved:</b> 2015/02/19	

- 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.

Application Ref No: 1328 Project Title: Test  
Project Work Flow State: Pre Submission

Application Form: PROTOCOL FOR RESEARCH INVOLVING HUMAN PARTICIPANTS

[Save](#) [Close](#) [Print](#) [Export to Word](#) [Export to PDF](#) [Submit](#)[Project Info](#) [Project Team Info](#) [\\* PROTOCOL FOR RESEARCH INVOLVING HUMAN PARTICIPANTS](#) [Attachments](#) [Approvals](#) [Logs](#) [Errors](#) Workflow Log  Project Log

Timestamp	Activity Log	Workflow State	Workflow Message	User	Role/Group
No records to display.					

# Applications Requiring Revisions

- If the reviewer(s) require any clarifications, the applicant will receive an e-mail from [romeoadmin@nipissingu.ca](mailto: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)”.



NIPISSING  
UNIVERSITY  
RESEARCH SERVICES

Role : Principal Investigator

Applications (Saved - Not Submitted)	(1)
Applications (Submitted - Requiring My Attention)	(0)
My Reminders	(0)
Applications (Submitted - Under Review) [Click here...]	
Applications (Submitted - Post Review) [Click here...]	
Applications (Withdrawn) [Click here...]	

# Logs Tab – Workflow Log & Project Log

- 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.

Application Ref No: 1328 Project Title: Test Project Work Flow State: Pre Submission Application Form: PROTOCOL FOR RESEARCH INVOLVING HUMAN PARTICIPANTS

Close Print Export to Word Export to PDF

TE: You are in view only mode, and changes cannot be saved.

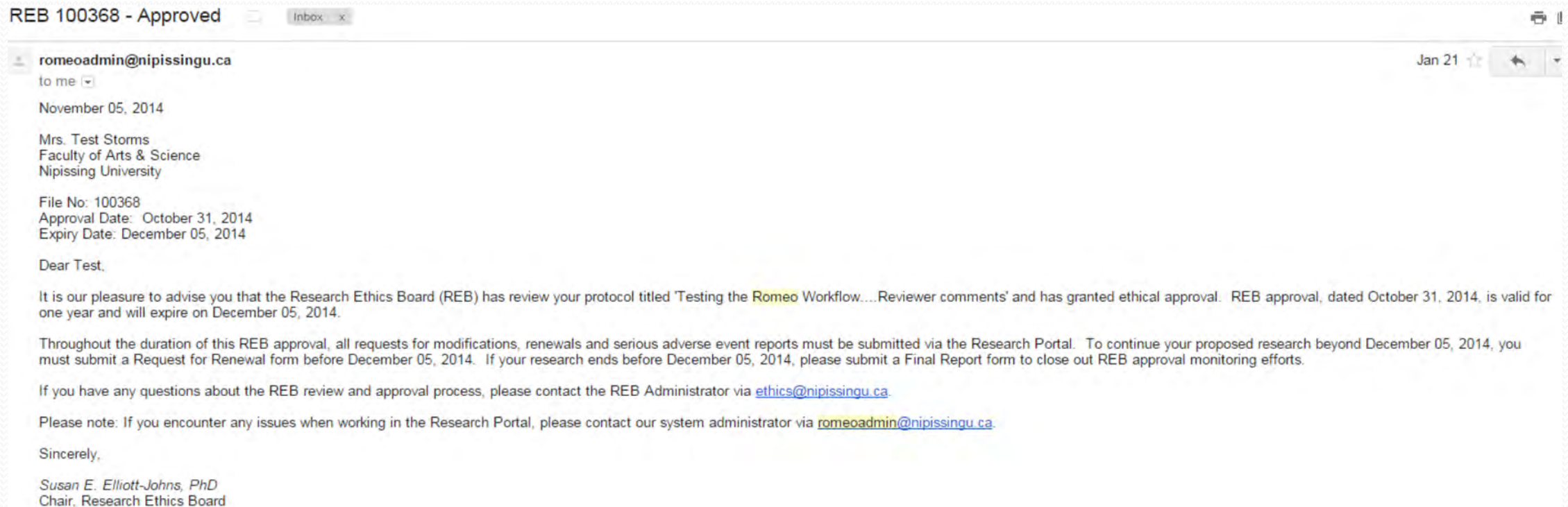
Project Info Project Team Info PROTOCOL FOR RESEARCH INVOLVING HUMAN PARTICIPANTS Attachments Approvals **Logs**

Workflow Log  Project Log

Timestamp	Activity Log	Workflow State	Workflow Message	User	Role/Group
No records to display.					

# 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)”.



REB 100368 - Approved

romeoadmin@nipissingu.ca  
to me

November 05, 2014

Mrs. Test Storms  
Faculty of Arts & Science  
Nipissing University

File No: 100368  
Approval Date: October 31, 2014  
Expiry Date: December 05, 2014

Dear Test,

It is our pleasure to advise you that the Research Ethics Board (REB) has review your protocol titled 'Testing the Romeo Workflow....Reviewer comments' and has granted ethical approval. REB approval, dated October 31, 2014, is valid for one year and will expire on December 05, 2014.

Throughout the duration of this REB approval, all requests for modifications, renewals and serious adverse event reports must be submitted via the Research Portal. To continue your proposed research beyond December 05, 2014, you must submit a Request for Renewal form before December 05, 2014. If your research ends before December 05, 2014, please submit a Final Report form to close out REB approval monitoring efforts.

If you have any questions about the REB review and approval process, please contact the REB Administrator via [ethics@nipissingu.ca](mailto:ethics@nipissingu.ca).

Please note: If you encounter any issues when working in the Research Portal, please contact our system administrator via [romeoadmin@nipissingu.ca](mailto:romeoadmin@nipissingu.ca).

Sincerely,

Susan E. Elliott-Johns, PhD  
Chair, Research Ethics Board

# Need Assistance/Have a Question

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

*Thank you!*