Romeo

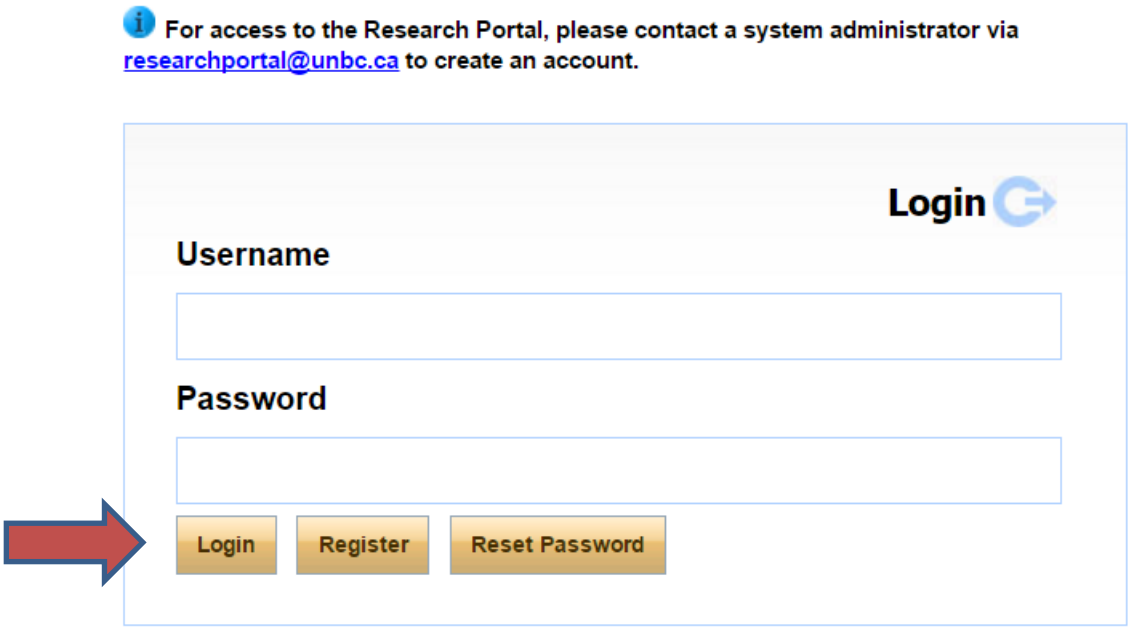
How to Submit an External Grant/Contract Application Form

Please note: Romeo is compatible with Internet Explorer, Firefox, Edge, and Google Chrome. Safari is NOT a recommended browser. If you have any problems or questions, please contact the Office of Research at 250-960-5796 or email researchportal@unbc.ca

Please also note: The process to apply for an external grant or to submit contract details is the same. The external grant application process will be used as an example in this document.

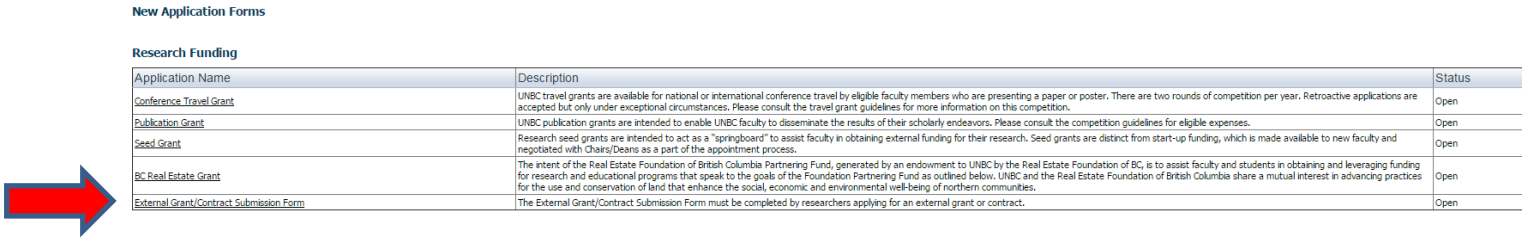
1. To access Romeo, copy and paste this link into your browser: https://unbc.researchservicesoffice.com/Romeo.Researcher/Login. You will also find a link to Romeo along with self-help and reference materials on the UNBC Office of Research website (www.unbc.ca/research).

2. Login using your UNBC email address (first name.last name@unbc.ca). If you do not have a Romeo account or are a first time Romeo user and do not have a password, please contact the Office of Research at 250-960-5796 or email researchportal@unbc.ca. If you forgot your password, please select "Reset Password" and follow the instructions to reset your password.



3. Once logged into Romeo, you will be brought to the Home page (like the example below).

4. To access all application forms available on Romeo, click on "APPLY NEW." You will be brought to a screen (similar to the one below), which lists all of the available online application forms. There are applications under four categories: Animal Care, Biohazardous Materials, Research Ethics, and Research Funding. Under Research Funding, select the "External Grant/Contract Application Form".

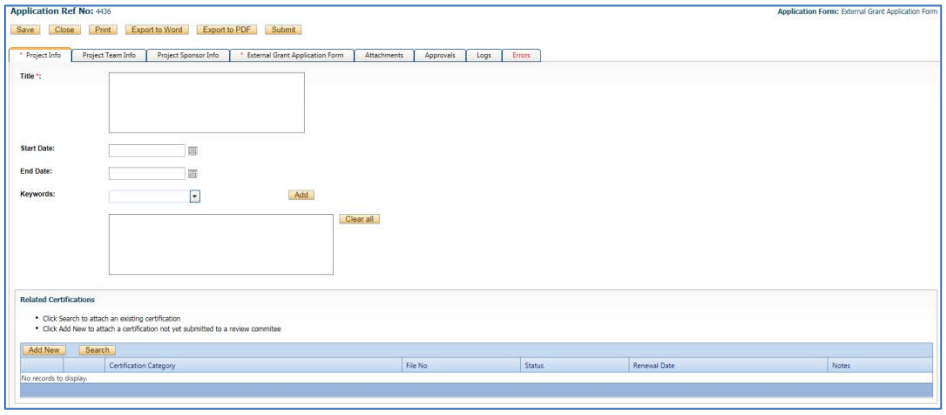


New Application Forms

Research Funding

Application Name	Description	Status
Conference Travel Grant	UNBC travel grants are available for national or international conference travel by eligible faculty members who are presenting a paper or poster. There are two rounds of competition per year. Retroactive applications are accepted but only under exceptional circumstances. Please consult the travel grant guidelines for more information on this competition.	Open
Publication Grant	UNBC publication grants are intended to enable UNBC faculty to disseminate the results of their scholarly endeavors. Please consult the competition guidelines for eligible expenses.	Open
Seed Grant	Research seed grants are intended to act as a "springboard" to assist faculty in obtaining external funding for their research. Seed grants are distinct from start-up funding, which is made available to new faculty and negotiated with Chairs/Deans as a part of the appointment process.	Open
BC Real Estate Grant	The intent of the Real Estate Foundation of British Columbia Partnering Fund, generated by an endowment to UNBC by the Real Estate Foundation of BC, is to assist faculty and students in obtaining and leveraging funding for research and educational programs that speak to the goals of the Foundation Partnering Fund as outlined below. UNBC and the Real Estate Foundation of British Columbia share a mutual interest in advancing practices for the use and conservation of land that enhance the social, economic and environmental well-being of northern communities.	Open
External Grant/Contract Submission Form	The External Grant/Contract Submission Form must be completed by researchers applying for an external grant or contract.	Open

4. You will be brought to a screen similar to the one below.



5. Under the "**Project Info**." tab, enter the project title, the anticipated start date and end date of the project and any appropriate keywords. Please note: fields marked with a red asterisk (*) are mandatory.

6. **Related Certifications**: If you require any certifications for your research, click on **"Add New"**. A small "Project Certification" window will open. Select the certification you require from the drop down list and enter any comments in the 'Notes' section (e.g. application pending approval of funding, etc.). Click **"Save"**. You can add multiple certifications, as needed.

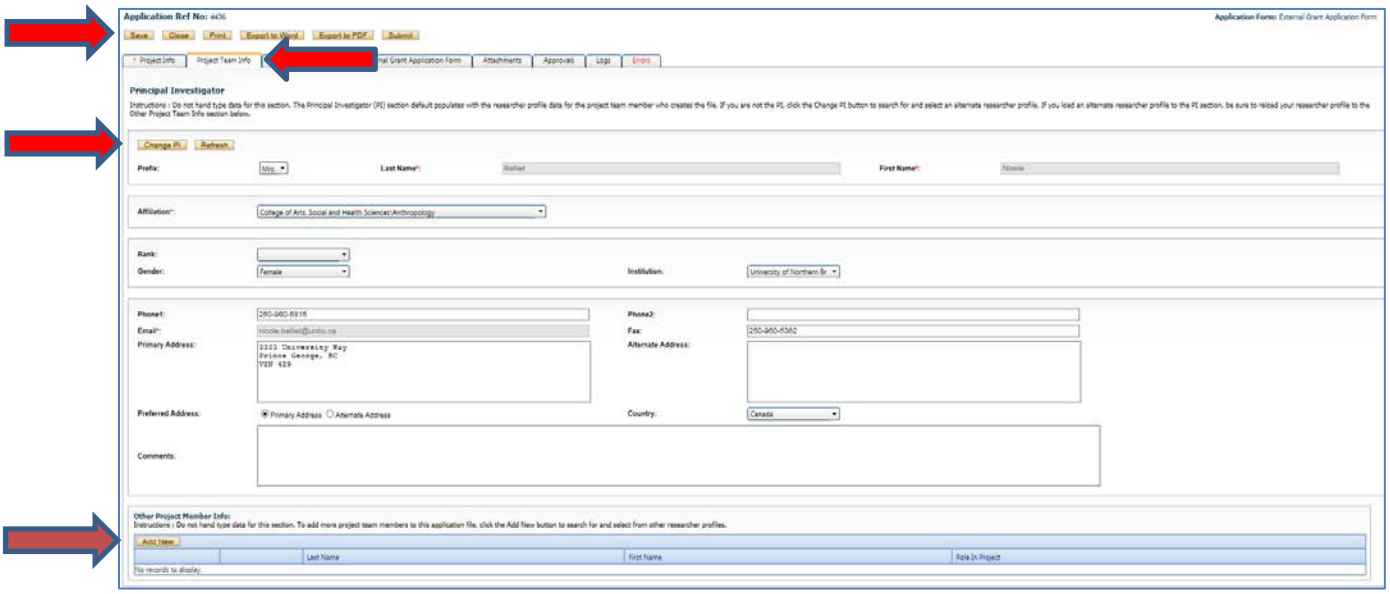
7. Select “Save” before moving to the next tab. At any time, you can save your application and continue working on it at a later time. It is always good practice to save your application before changing tabs or leaving the application for an extended period of time.

8. Proceed to the “Project Team Info.” tab. You will see a screen similar to the one below. The Principal Investigator information will auto-populate with your profile information. If you are not the PI, click the Change PI button to search for and select an alternate researcher profile. Keep in mind, only the PI can submit the form, therefore, if the PI is not from UNBC, please enter the Project PI as a team member, select their role as co-PI and enter a comment in the comments field indicating that this individual is the Project PI. If the Project PI is not from UNBC and is not already entered into the IMR, you can add the individual on this page, ‘register’ the individual yourself from the login page or contact the Office of Research and provide them with the Project PI’s contact information and have them add the individual to the IMR. Remember: if you remove yourself as PI, you will need to add yourself as a project team member, otherwise you will no longer be able to access the application.

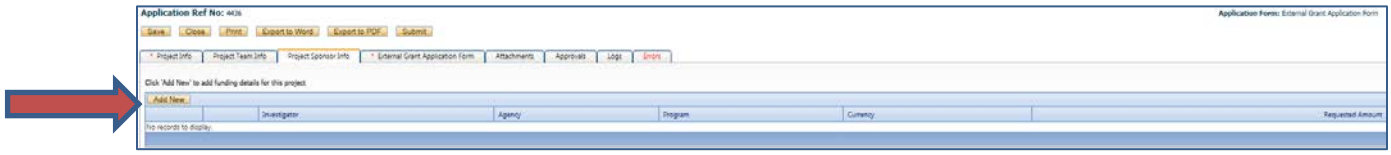
Other Project Member Info: click on ‘Add New’ and ‘Search Profiles’ for your team member(s) by name. If the researcher is not on the list, you can add the individual on this page, ‘register’ the individual yourself from the login page or contact the Office of Research to have the investigator added to the IMR (please provide the Office with all of the contact information). Always remember to search before creating a new profile. Duplicate profiles will need to be deleted. Repeat this process for all additional team members.

Please contact the Office of Research if your profile information is incorrect or out-of-date.

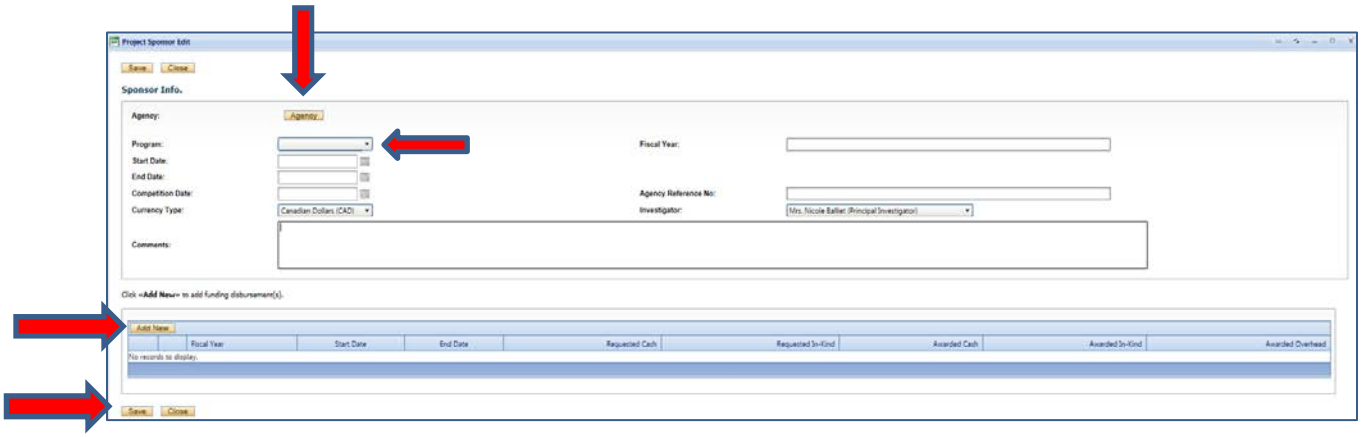
Click on “Save” to save the information entered on this page.



9. Next, proceed to the “Project Sponsor Info.” tab. You will see a screen similar to the one below. Click “Add New.”



If there are multiple sponsors/partner organizations for your project, you will need to repeat the process described below for each sponsor/partner organization.

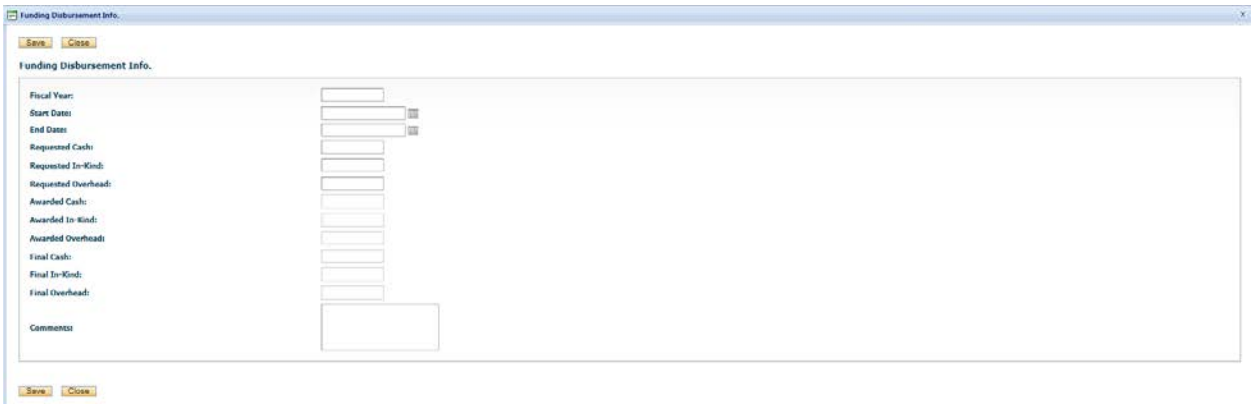


Agency: Click on “Agency” and search for the Funding Agency you are applying to. You may conduct a search using the Agency Name or abbreviation (e.g. NSERC/SSHRC/CIHR). If the agency you are applying to is not in the list, please contact the Office of Research with the details. Click on “Select” to choose the agency.

Program: Click on the drop-down list beside “Program” and select the program you are applying to (e.g. Discovery Grants, Insight Development Grants, etc.). If the program you are applying to is not in the list, please contact the Office of Research with the details.

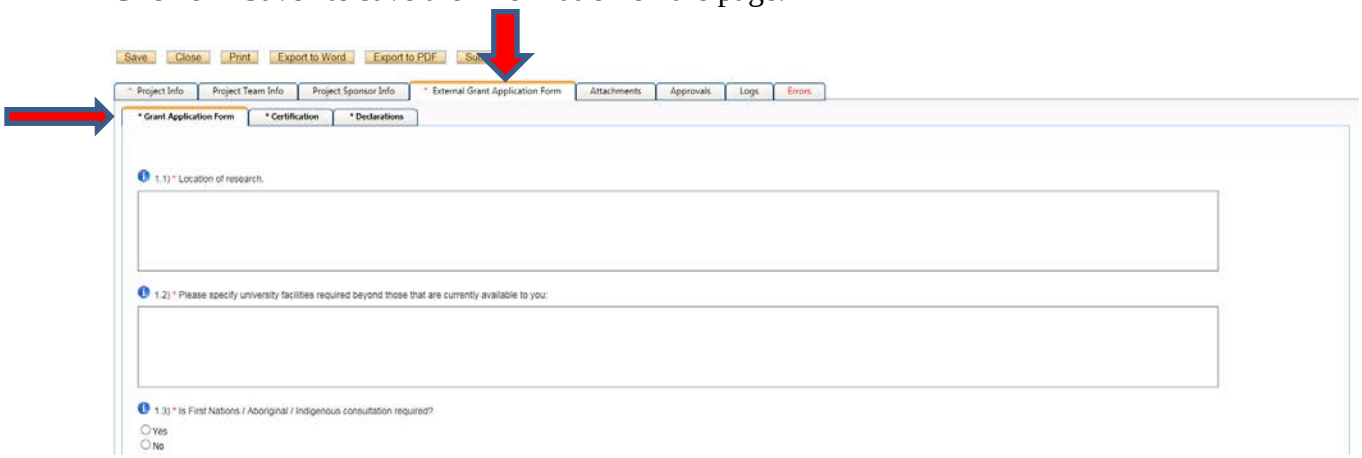
Enter the anticipated Start Date and End Date. Enter the agency application deadline, if applicable. The Currency Type should always be CAD. If there are Sponsor-related comments that you would like to make, please do so in the “Comments” box. The Fiscal Year box will auto-populate when you enter the start and end dates. If there is more than one project team member, you will be able to select the investigator associated with the funding. The default is the PI. Click “Save.”

10. A new funding disbursement will need to be entered for each year of funding. Click “Add New” (see figure above) to add a funding disbursement. You will a screen similar to the one below.



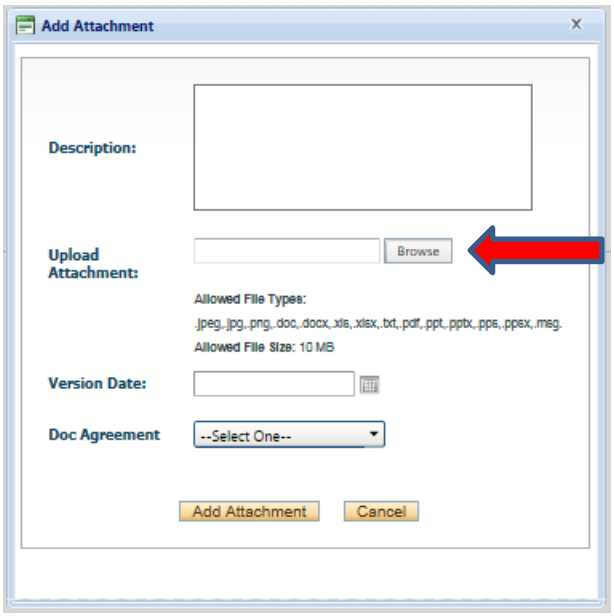
The Fiscal Year field will auto-populate when you enter the anticipated start and end dates of your project. Enter the requested cash that will be coming to UNBC (rather than the overall grant requested, if you are a co-applicant on a grant application, for example). Funds should be entered in CAD (if funding is to be provided in another currency, please indicate the original currency in the comments section). Enter requested in-kind (if any) from the *same* sponsor (you will need to add a new sponsor if the in-kind contribution(s) come from a separate sponsor(s)). Please note: All in-kind contributions need back-up (e.g. letter of support, email, quotation, etc.) indicating the level of support. Cash in-kind (i.e. cash that will be contributed to the project at the sponsor/partner agency and won't be coming to UNBC, needs to be entered as "in-kind." Leave the requested overhead filed blank. Instead, enter the percentage overhead requested in the comments box. Remember to click "save" before closing this page. Click on "Save" again to save the entire Sponsor Info. page.

11. Next, proceed to the "External Grant Application Form" tab. You will see a screen similar to the one below. Answer all of the applicable questions under the "Grant Application Form," "Certification," and "Declarations" tabs. Questions with a red asterisk (*) are required questions. Click on "Save" to save the information on the page.



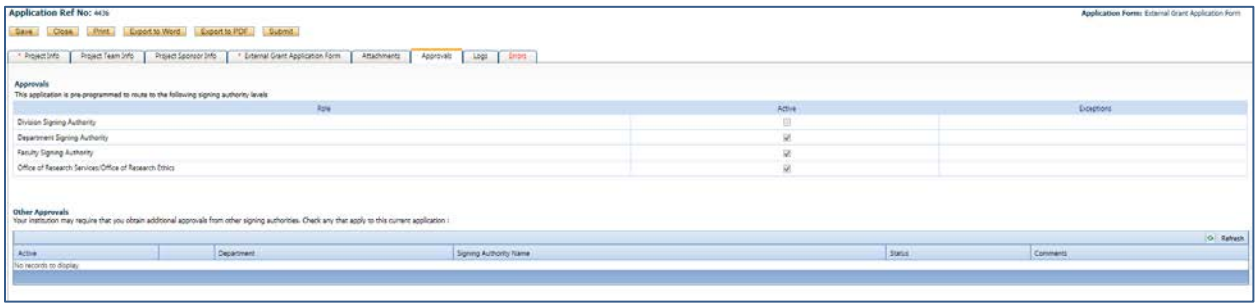
12. Next, proceed to the "Attachments" tab. You will see a screen similar to the one below.

This is where you can upload any required attachments to the application (e.g. CV, application form, contract details, etc.). Begin by clicking on “Add Attachment” (as in the screen above).

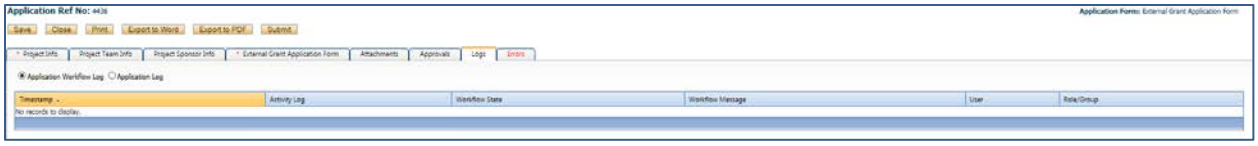


Browse for and upload your attachment. Enter the date of submission as the version date. Select the type of document you are uploading (Application, CV, etc). Click on “Add Attachment.” Click on “Save” to save the information on this page.

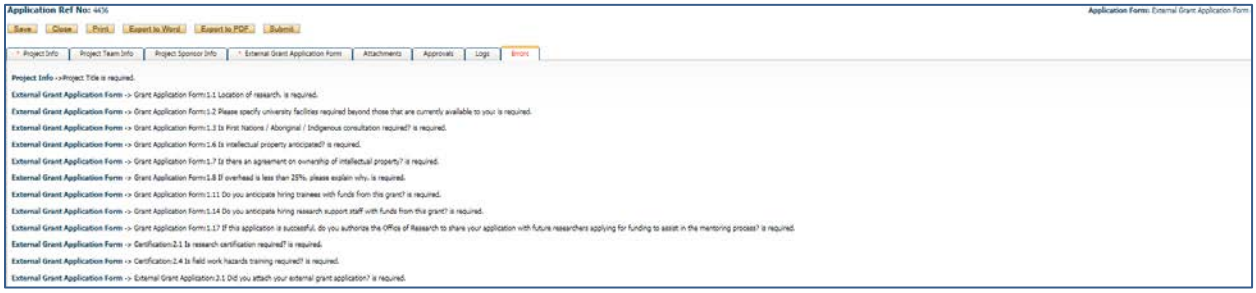
13. “Approval” tab. There is no information to be entered in this section. Applications are automatically routed to the next signing authority (as indicated).



14. “Logs” tab. There is no information to be entered in this section. You can toggle between “Application Workflow Log” and “Application Log” to see where your application is at in the approval process and to see any log activity.



15. “Errors” tab. This section will show you where there are errors in your application form. All errors must be corrected before you will be able to submit your application.



16. Final Processes. “Save” the information entered in your application. You can also choose to “Print,” “Export to Word,” or “Export to PDF” your application. When you are ready, “Submit” your application. It will automatically be forwarded to the next signing authority. You will receive confirming emails each time the application is forwarded and approved through the work flow. If at any time, further information is required, you will receive an email indicating such.

17. At any time, you can view the status of your application a) under an individual application’s “Log” tab or b) from the Home screen, under “Applications: Under Review.”