

Romeo

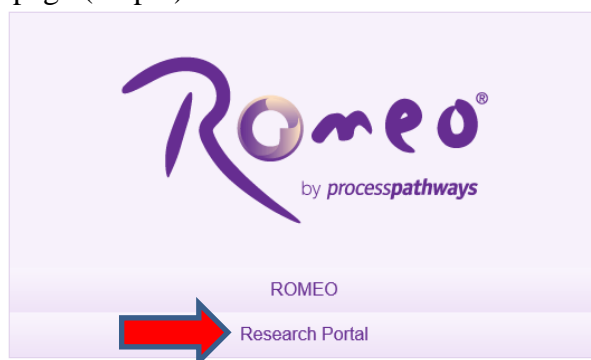
How to complete a Grant/Contract Amendment Form (Event Form)

Please submit a Grant/Contract Amendment Form (Event Form) when you need to make changes to an existing funding application/contract, for instance,

- you are applying for a change in the end date of your project, or
- you have received new or additional funding for an existing project.

Please note: Romeo is compatible with Internet Explorer, Firefox, Microsoft Edge, and Google Chrome. Safari is NOT a recommended browser. If you have any problems or questions, please contact the Office of Research at 250-960-5852 or email researchportal@unbc.ca

1. To access Romeo, go to <https://unbc.researchservicesoffice.com> and click on “Research Portal” (see below). 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). This link will take you directly to the login page (Step 2).



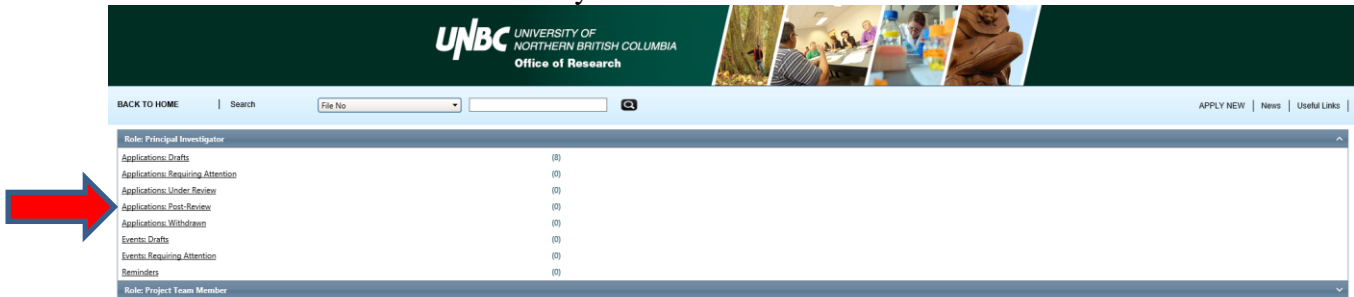
2. Login using your UNBC email address (first name.last name@unbc.ca). If you are a first time Romeo user and do not have a password, or if you have forgotten your password, select “Reset Password” and follow the instructions to set/reset your password. If you do not have a Romeo account, click “Register”, or contact the Office of Research at 250-960-5852 or email researchportal@unbc.ca

Please note: if you are unsure if you have previously registered for an account, please contact the Office of Research before registering, as duplicate accounts will need to be deleted.

The image shows a login form for the Romeo system. It has a light blue background. At the top right, there is a "Login" button with a blue circular icon containing a white 'G'. Below this, there are two input fields: "Username" and "Password". At the bottom of the form, there are three buttons: "Login", "Register", and "Reset Password". These three buttons are enclosed in a red rectangular box.

3. **Event forms** are used to provide updates or make changes to an existing project. For example, you need to submit an event form if you are applying for a change to the end date of your project, or you have received new or additional funding for a project.

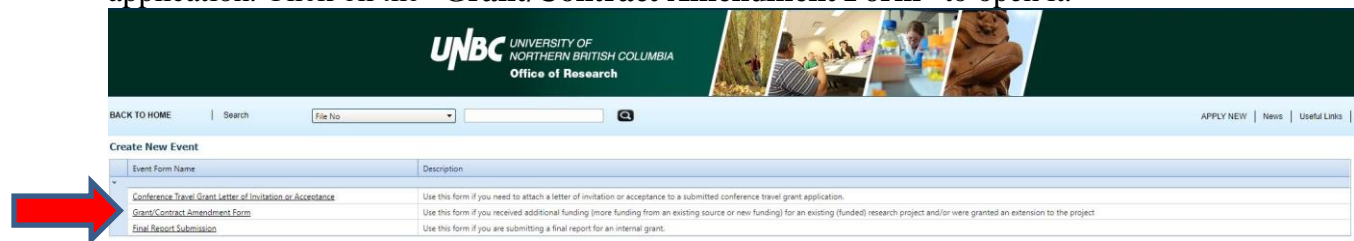
To access event forms, click on the “**Applications: Post-Review**” link on your Romeo home page (see below). You can also access event forms via the “**Reminders**” link when an event form submission is due within 30 days.



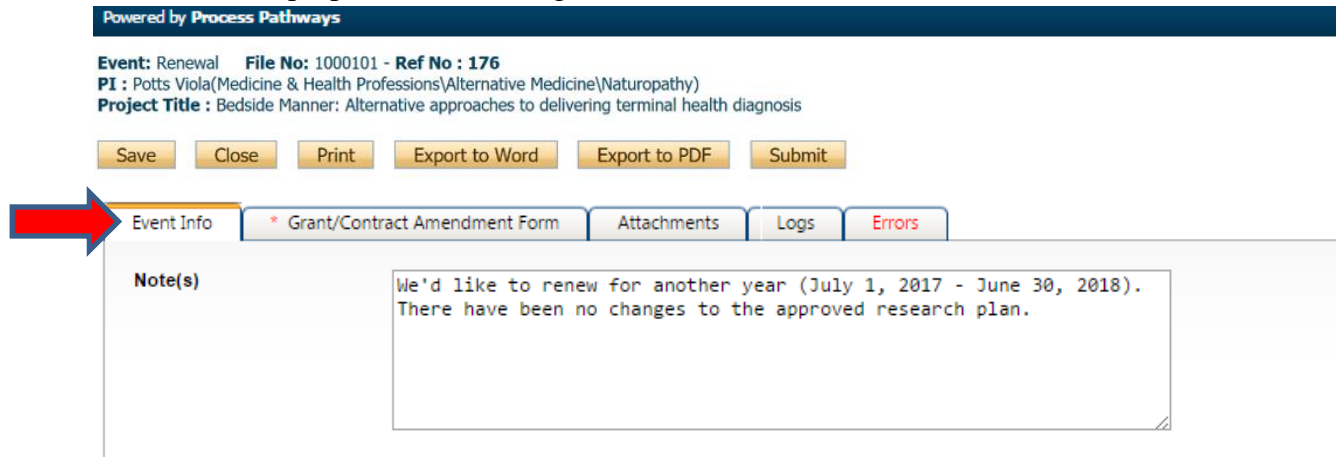
You will be brought to a screen (similar to the one below), which lists your previous applications, and the options available for each application. Click on the “**Events**” button next to the relevant application.



A screen will open (similar to the one below), which lists all of the available event forms for that application. Click on the “**Grant/Contract Amendment Form**” to open it.



4. You will be brought to a screen similar to the one below. Under the “**Event Info**” tab, enter general comments about the event form in the “**Note(s)**” text box. For example, you may wish to summarize the purpose of submitting the event form.



Powered by Process Pathways

Event: Renewal File No: 1000101 - Ref No : 176
 PI : Potts Viola(Medicine & Health Professions\Alternative Medicine\Naturopathy)
 Project Title : Bedside Manner: Alternative approaches to delivering terminal health diagnosis

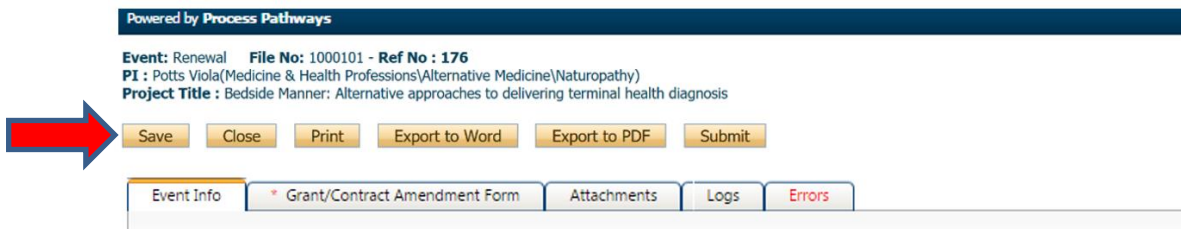
Save Close Print Export to Word Export to PDF Submit

Event Info * Grant/Contract Amendment Form Attachments Logs Errors

Note(s)

We'd like to renew for another year (July 1, 2017 - June 30, 2018).
 There have been no changes to the approved research plan.

5. Click “**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.



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Event: Renewal File No: 1000101 - Ref No : 176
 PI : Potts Viola(Medicine & Health Professions\Alternative Medicine\Naturopathy)
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Save Close Print Export to Word Export to PDF Submit

Event Info * Grant/Contract Amendment Form Attachments Logs Errors

6. Proceed to the “**Grant/Contract Amendment Form**” tab. This tab includes event-specific questions to assess the nature of amendment request. Answer the questions on both the “**Project Information**” and “**Project Sponsor Information**” tabs.

NOTE: fields marked with a red asterisk (*) are mandatory, but please answer all questions relevant to your event form submission.




Print Export to Word Export to PDF

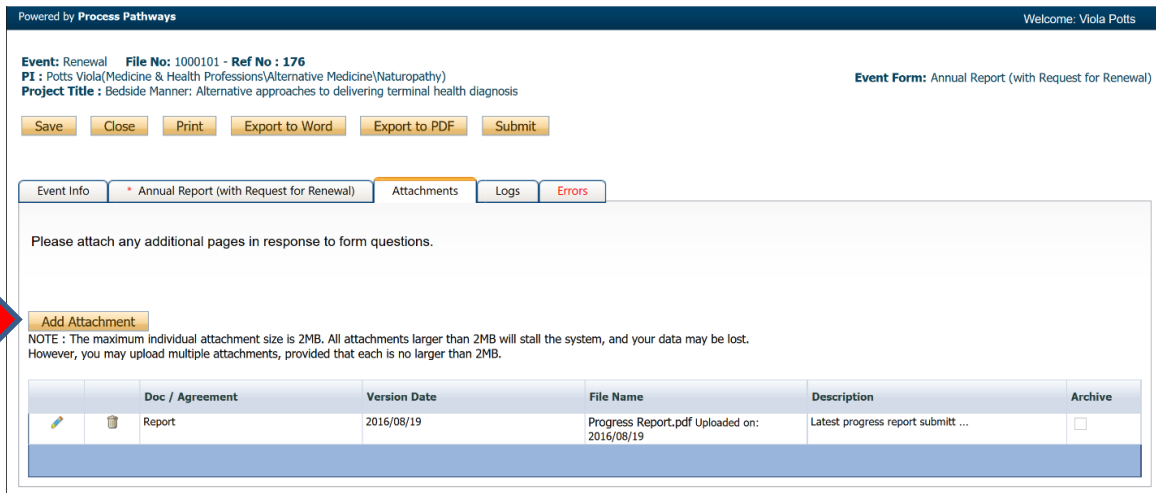
Event Info * Grant/Contract Amendment Form Attachments Logs Errors

* Project Information * Project Sponsor Information

1.1* Has there been a change to the end date of the approved grant/contract?
☐ Yes
☐ No

1.2 Enter the new end date of the approved grant/contract:
 

7. Proceed to the “**Attachments**” tab. This tab allows you to upload all required attachments. Begin by clicking on “**Add Attachment**”.



Powered by **Process Pathways** Welcome: Viola Potts

Event: Renewal **File No:** 1000101 - **Ref No:** 176
PI : Potts Viola(Medicine & Health Professions\Alternative Medicine\Naturopathy)
Project Title : Bedside Manner: Alternative approaches to delivering terminal health diagnosis **Event Form:** Annual Report (with Request for Renewal)



Save Close Print Export to Word Export to PDF Submit

Event Info *** Annual Report (with Request for Renewal)** Attachments Logs Errors

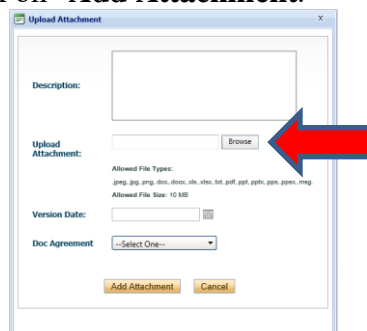
Please attach any additional pages in response to form questions.

Add Attachment

NOTE : The maximum individual attachment size is 2MB. All attachments larger than 2MB will stall the system, and your data may be lost. However, you may upload multiple attachments, provided that each is no larger than 2MB.

	Doc / Agreement	Version Date	File Name	Description	Archive
 	Report	2016/08/19	Progress Report.pdf Uploaded on: 2016/08/19	Latest progress report submitt ...	<input type="checkbox"/>

A pop-up window will open. To upload an attachment, click the “**Browse**” button (see below). Enter a **Description**, if applicable. Enter the date of submission as the “**Version Date**”. Under the “**Doc Agreement**” pull-down menu, select the type of document you are uploading (Contract, Agreement, etc.). Click on “**Add Attachment**.”



Upload Attachment

Description:

Upload Attachment: **Browse**

Allowed File Types:
 .jpg .png .gif .doc .docx .xls .xlsx .htm .html .pdf .ppt .pptx .pps .ppsx .mpg

Allowed File Size: 10 MB

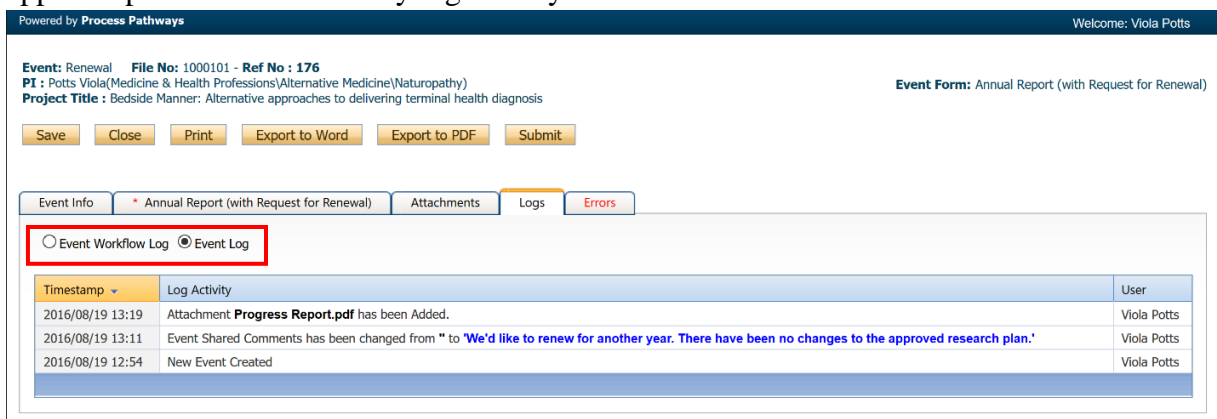
Version Date:

Doc Agreement: --Select One--

Add Attachment Cancel

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

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



Powered by **Process Pathways** Welcome: Viola Potts

Event: Renewal **File No:** 1000101 - **Ref No:** 176
PI : Potts Viola(Medicine & Health Professions\Alternative Medicine\Naturopathy)
Project Title : Bedside Manner: Alternative approaches to delivering terminal health diagnosis **Event Form:** Annual Report (with Request for Renewal)

Save Close Print Export to Word Export to PDF Submit

Event Info *** Annual Report (with Request for Renewal)** Attachments **Logs** Errors

☐ Event Workflow Log ☒ **Event Log**

Timestamp	Log Activity	User
2016/08/19 13:19	Attachment Progress Report.pdf has been Added.	Viola Potts
2016/08/19 13:11	Event Shared Comments has been changed from " " to 'We'd like to renew for another year. There have been no changes to the approved research plan.'	Viola Potts
2016/08/19 12:54	New Event Created	Viola Potts

9. **“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.

The screenshot shows the 'Errors' tab selected in the application form. The header bar indicates 'Powered by Process Pathways' and 'Welcome: Viola Potts'. The form details include: Event: Renewal, File No: 1000101 - Ref No : 176, PI : Potts Viola(Medicine & Health Professions\Alternative Medicine\Naturopathy), and Project Title : Bedside Manner: Alternative approaches to delivering terminal health diagnosis. The Event Form is 'Annual Report (with Request for Renewal)'. Below the header, there are buttons for Save, Close, Print, Export to Word, Export to PDF, and Submit. The 'Errors' tab is active, showing a list of errors with their status and required actions. The errors are:

- Annual Report (with Request for Renewal) -> Study Status:1.3 Indicate the expected end date of your study: is required.
- Annual Report (with Request for Renewal) -> Study Status:1.5 Have you experienced any problems to date in carrying out this project? is required.
- Annual Report (with Request for Renewal) -> Study Status:1.9 Since the original approval, have there been any new reports in the literature that would suggest a change in the nature or likelihood of risks or benefits resulting from participation in this study? is required.
- Annual Report (with Request for Renewal) -> Study Status:1.7 Have participants experienced any harm as a result of their participation in your study? is required.
- Annual Report (with Request for Renewal) -> Study Status:1.1 Has your study commenced? is required.
- Annual Report (with Request for Renewal) -> Study Status:1.2 Indicate the study start date: is required.
- Annual Report (with Request for Renewal) -> Study Status:1.4 How many participants have been recruited to date? is required.

10. **Final Processes.** Click to **“Save”** the information entered in your application. You can also choose to **“Print”**, **“Export to Word”**, or **“Export to PDF”** your application.

The screenshot shows the application form with a red arrow pointing to the 'Save' button. The header bar indicates 'Powered by Process Pathways'. The form details include: Event: Renewal, File No: 1000101 - Ref No : 176, PI : Potts Viola(Medicine & Health Professions\Alternative Medicine\Naturopathy), and Project Title : Bedside Manner: Alternative approaches to delivering terminal health diagnosis. The Event Form is 'Grant/Contract Amendment Form'. Below the header, there are buttons for Save, Close, Print, Export to Word, Export to PDF, and Submit. The 'Save' button is highlighted with a red arrow.

11. When you are ready, click to **“Submit”** your event form. It will automatically be forwarded to the Office of Research and Innovation for review and approval. The Romeo system does not

The screenshot shows the application form with a red arrow pointing to the 'Submit' button. The header bar indicates 'Powered by Process Pathways'. The form details include: Event: Renewal, File No: 1000101 - Ref No : 176, PI : Potts Viola(Medicine & Health Professions\Alternative Medicine\Naturopathy), and Project Title : Bedside Manner: Alternative approaches to delivering terminal health diagnosis. The Event Form is 'Grant/Contract Amendment Form'. Below the header, there are buttons for Save, Close, Print, Export to Word, Export to PDF, and Submit. The 'Submit' button is highlighted with a red arrow.

forward amendment applications to Chairs and Deans, therefore, please remember to connect with your Chair and Dean regarding your amendment.