Romeo

How to Review and Approve an Application (For Program Chairs & Deans)

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 and Innovation at researchportal@unbc.ca

This approval process is only required for external grant applications or contracts.

Step 1: Researcher submits application

Once a researcher has submitted an application, the respective signing authority (Chair and/or Dean) will receive a notification email similar to the one below. By default, the email will be sent from 'do-not-reply-unbc@researchservices.com'. A copy is also sent to researchportal@ unbc.ca to notify the Office of Research and Innovation (ORI). Note that the application has a reference number; this will be helpful should you have several applications needing approval.

Example of email notifying the signing authority of a grant application or contract that requires approval.

From: researchportal@unbc.ca [mailto:researchportal@unbc.ca]
Sent: Tuesday, February 07, 2017 1:41 PM
To: Nicole Balliet
Cc: Research Portal
Subject: Grant for Review

February 07, 2017

Dear Signing Authority,

Application Reference No: 4504

External Grant Application Form titled 'Romeo test of approval process by OR has been submitted by Ms. Diana Kutzner and requires your review and decision.

Please login to Romeo's "Researcher Portal" at https://unbc.researchservicesoffice.com/ to complete this task.

Once you have received the email, you can either click on the link provided in the email or go to the UNBC Romeo login page at https://unbc.researchservicesoffice.com. Login using your UNBC credentials (username@unbc.ca). If you are a first time Romeo user and do not have a password, or if you have forgotten your password, please contact the ORI at researchportal@unbc.ca.

Step 2: Approval by signing authority

Once you login to Romeo, you will see a screen similar to the following one. The task/action needing your attention will be highlighted in red font. Click on "Applications: New" to proceed to the application needing approval.

Any applications needing your approval will show in the next screen, as seen in the example below. Find the application you want to review by looking at the Reference Number and click on "Review" to proceed.

Review the application by going through each tab. Note that you will be able to download any required documents or supplementary material under the "Attachments" tab.

Once you have completed your review, click on "Approval Process".

A separate window will pop up that gives you several options to proceed with the approval process (see below).

Approve: select to indicate your approval and progress the application through its prescribed workflow. The Researcher will receive a notification email accordingly.

Request Information: select if you require further information from the researcher. Elaborate on what you require in the comments box.

> Note: The application will be sent back to the researcher, who can edit the application and resubmit it accordingly. When the application is resubmitted, the signing authority will be notified of the resubmission. When resubmitted, the application will skip any signing authority level that has approved the application when it was first submitted. For instance, if the ORI requests further information and sends the application back to the researcher, the resubmission will skip all signing authorities that have already given approval.

Forward to Next signing authority: please do not use this option

Incorrect Department: please do not use this option. Contact the ORI if an application has been routed to you in error.
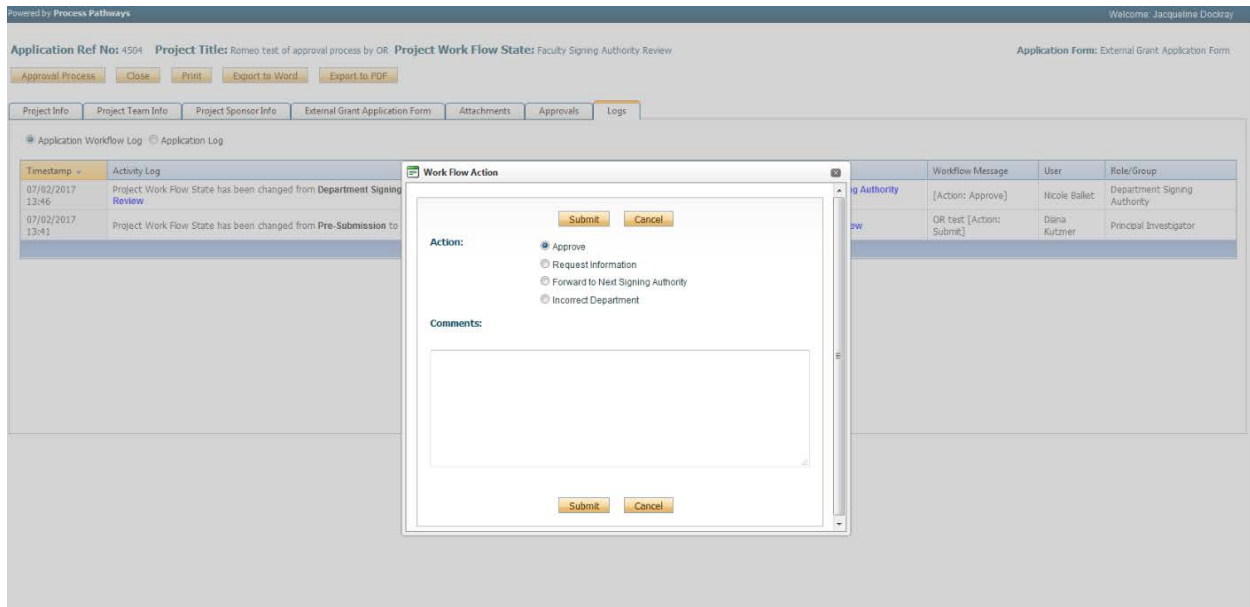
Once the signing authority has approved the application, the Researcher will receive an email notifying them that the application has been approved at this level. The next signing authority will receive an email similar to the one below to notify them that an application requires their approval.
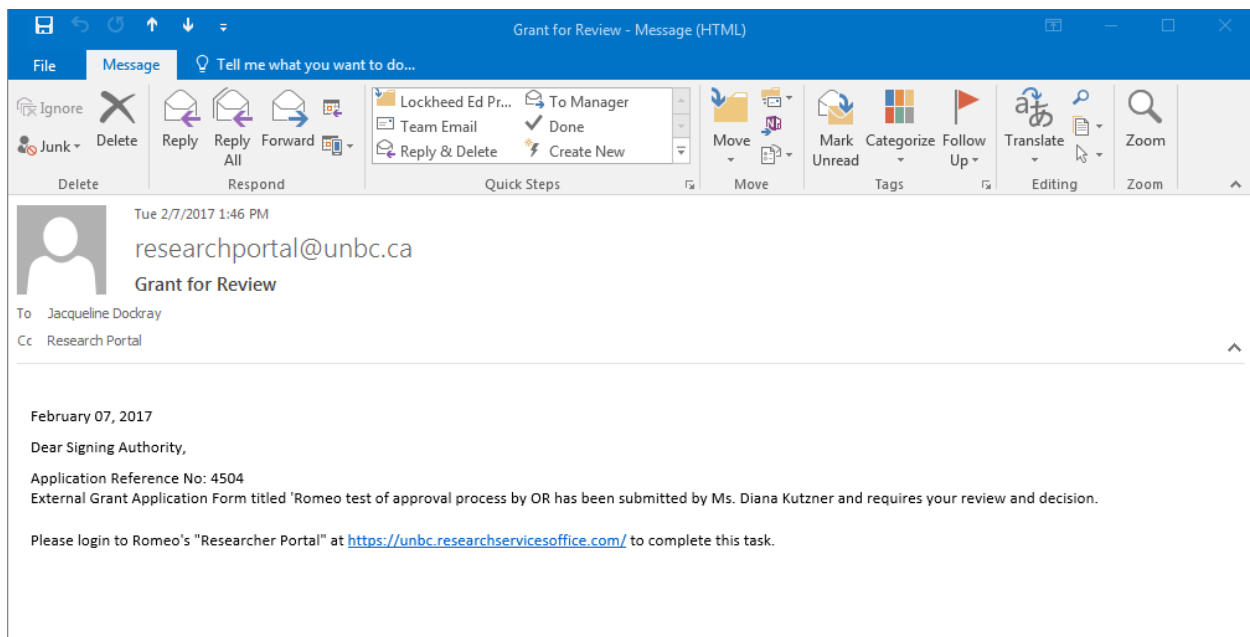
The process for all signing authorities to review the application is the same as described above.

Updated Aug 31, 2022