

# RESEARCHER MANUAL

## SUBMITTING A RESEARCH ETHICS APPLICATION

Please use the ROMEo platform to submit a Research Ethics Application for a NEW project. If you are making changes to an existing project that is already in ROMEo, please complete an Event Form (Amendment, Renewal, etc.) within that project's application.

Please note: Romeo is compatible with Internet Explorer, Firefox, Microsoft Edge, Google Chrome and Safari. If you have any problems or questions, please contact the Office of Research and Innovation at [research@unbc.ca](mailto:research@unbc.ca).

**It is always good practice to save your application before changing tabs or leaving the application for an extended period of time.** At any time, you can save your application and continue working on it later.

1. To access Romeo, go to <https://unbc.researchservicesoffice.com> and click on "Research Portal" (see below).



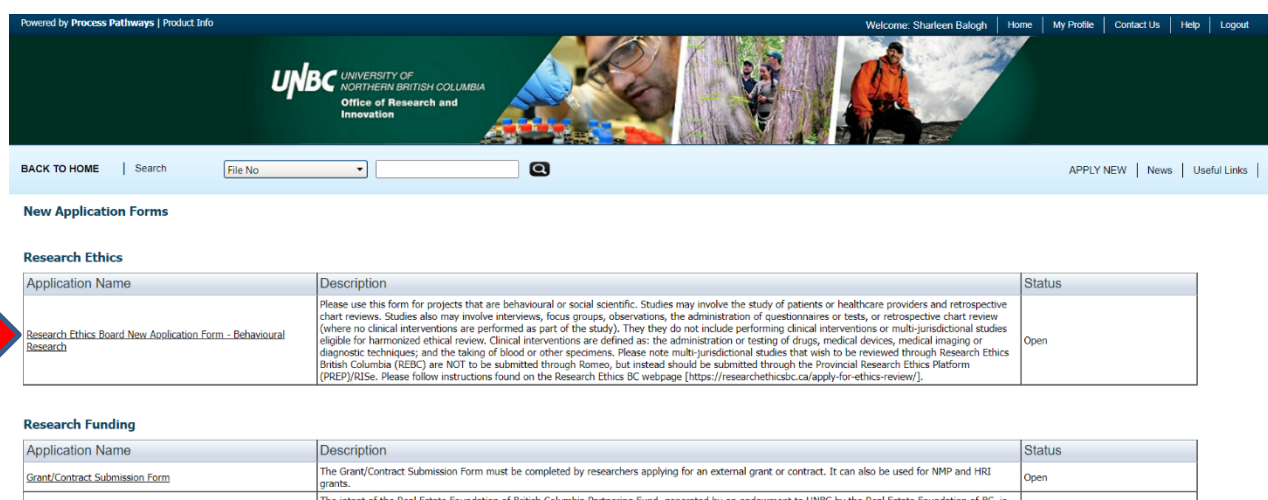
2. Login using your UNBC credentials (username@unbc.ca) and password. If you do not have a Romeo account, contact the Office of Research and Innovation at [research@unbc.ca](mailto:research@unbc.ca). You may be required to verify your identity with the mobile device "Authenticator" app or MFA Hardware Token issued by UNBC ITS to verify your identity, so please ensure that you have this available when you login.

3. Once you have logged into Romeo, you will be brought to the Home Page (see the example below). 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.

Under **Research Ethics**, select “**Research Ethics New Application Form**”.



4. You will be brought to a screen similar to the one below. Under the “**Project Info**” tab, complete:

**Title:** Title of the project.

**Start Date and End Date:** Enter the proposed project Start/End dates for the full study, inclusive of Human Participant Involvement.

**Keywords:** provide any appropriate keywords (you can type or copy and paste keywords into the box instead of using the “add” function).

Please note: fields marked with a red asterisk (\*) are mandatory.

Powered by Process Pathways Welcome: Sharkeen Balogh

Application Ref No: 7940 Application Form: Research Ethics Board New Application Form - Behavioural Research

[Save](#)
[Close](#)
[Print](#)
[Export to Word](#)
[Export to PDF](#)
[Submit](#)
[Withdraw](#)

[Project Info](#)
[Project Team Info](#)
[Research Ethics Board New Application Form - Behavioural Research](#)
[Attachments](#)
[Approvals](#)
[Logs](#)
[Errors](#)

**Title \***

**Start Date:**

**End Date:**

**Keywords:**  [Add](#)

[Clear all](#)

**Related Awards**

If you are a student, please ignore this section and continue to the next tab.  
If you are a non-student ( e.g faculty, staff) and have applied for, or have been awarded, research funding, click "Search" to locate and attach the related research funding. If the related research funding is not found please ignore this section and continue to the next tab.

[Search](#)

**Related Awards:** If there is any funding associated with this certification that is being administered at UNBC through the Romeo Research Portal, please go to the bottom of the Project Info Tab under Related Awards and click on “**Search**” to add the associated Romeo funding file. If research funding is being administered externally, this will be captured later in this application.

[Project Info](#)
[Project Team Info](#)
[Research Ethics Board New Application Form - Behavioural Research](#)
[Attachments](#)
[Approvals](#)
[Logs](#)
[Errors](#)

**Title \***

**Start Date:**

**End Date:**

**Keywords:**  [Add](#)

[Clear all](#)

**Related Awards**

If you are a student, please ignore this section and continue to the next tab.  
If you are a non-student ( e.g faculty, staff) and have applied for, or have been awarded, research funding, click "Search" to locate and attach the related research funding. If the related research funding is not found please ignore this section and continue to the next tab.

[Search](#)

Award File No	Title	Award Status	PI Last Name	PI First Name	Sponsors Summary	Notes
No records to display.						

A new “Award Application List” window will open. Search for and select the Romeo funding file associated with this certification using the search fields below.

The screenshot shows a window titled 'Awards'. At the top, it says 'Please select awards related to File#: 600[redacted]'. Below this are search fields for 'File #', 'Project Title', 'PI Last Name', and 'PI Given Name', with 'Submit' and 'Cancel' buttons. A 'Search' button is at the bottom of the search fields. Below the search fields, it says 'All Awards. Only the first 50 matches will be displayed'. A table follows with columns: 'File No', 'Title', 'Primary Investigator', 'Status', and 'Owner Group'. The table contains three rows of data, all with 'Closed' status and 'Research Funding' as the owner group. The first row has a checkbox in the 'File No' column.

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

The screenshot shows the top of an application form. It has a header bar with 'Powered by Process Pathways' and 'Welcome: Sharleen Balogh'. Below the header, it says 'Application Ref No: 7941' and 'Application Form: Research Ethics Board New Application Form - Behavioural Research'. A row of buttons includes 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', 'Submit', and 'Withdraw'. A red arrow points to the 'Save' button. Below the buttons is a tabbed interface with tabs for 'Project Info', 'Project Team Info', 'Research Ethics Board New Application Form - Behavioural Research', 'Attachments', 'Approvals', 'Logs', and 'Errors'. The 'Project Info' tab is selected, showing a 'Title' field.

6. Proceed to the “Project Team Info” tab.

The Principal Investigator information will auto-populate with your profile information. Please contact the Office of Research and Innovation at [research@unbc.ca](mailto:research@unbc.ca) if your profile information is incorrect or out-of-date.

**External project team members:** If Co-investigators are external to UNBC, or are with UNBC and do not have a ROMEO profile **and will not require access to the application form**, their name, institution, contact information, and role in the study can be added in the Investigator Comments text box.

All identified project team members can contribute to an application form pre-submission, but only the Principal Investigator can submit an application form.

**Students or researcher under supervision, team member or research coordinator:** If the application form has been initiated by a **student or researcher under supervision**, a **team member** or a **research coordinator**, the role of Principal Investigator will automatically be populated with that individual’s information. This **must be** switched using the “Change PI” button (red arrow below).

Resumed by Process Pathways Welcome: Sharleen Balogh

Application Ref No: 7542 Application Form: Research Ethics Board New Application Form - Behavioural Research

Save Close Print Export to Word Export to PDF Submit Withdraw

Project info Project Team info Research Ethics Board New Application Form - Behavioural Research Attachments Approvals Logs Errors

### 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: Mr. Last Name: Balogh First Name: Sharleen

Affiliation: Office of Research and Innovation

Position: Other Institution: University of Northern B.C.

Phone1: 250-960-5629 Phone2: Email: sharleen.balogh@unbc.ca Fax: Primary Address: 3333 University Way Prince George, BC V2N 4Z9 Alternate Address: Location: C204 2000 Preferred Address: ☒ Primary Address ☐ Alternate Address Country: Canada Comments:

Other Project Member Info: Do not hand type data for this section. To add more project team members to this application form, click Add New to search for and select from other researcher profiles. Click [?] for more info.

Add New

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

This will open a pop-up window. You can search for your **supervisor's** Romeo profile by typing their first and/or last name into the search boxes (red rectangle below) and clicking “Search” (red arrow below). This will bring up a list of all Romeo profiles with this name. Select the correct profile for your supervisor by clicking the “Select” button (green arrow below). If your supervisor does not have a Romeo profile, click “Close” and have them contact the Office of Research and Innovation to be added to the list.

Investigator List

Close

Instructions: Search for and select the researcher profile you want to load to this application file. If the project team member does not have a researcher profile, contact your system administrator for guidance.

☐ Start With ☒ Any part  
 Last Name: balogh  
 First Name:

Search Reset

Options	Last Name	First Name	Primary Affiliation
Select	Balogh	Sharleen	Office of Research and Innovation

Close

Once the PI for the application has been changed to the academic supervisor, you will need to ensure that you add yourself as a Project Team Member so that you will continue to be able to access and edit the application. Click on “Add New” under “Other Project Member Info” (red arrow below).

Submitted by Process Pathways

Application Ref No: 7542

Application Form: Research Ethics Board New Application Form - Behavioural Research

Save Close Print Export to Word Export to PDF Submit Withdraw

Project Info Project Team Info Research Ethics Board New Application Form - Behavioural Research Attachments Approvals Logs Errors

### 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: Mr. Last Name: Balogh First Name: Shaheen

Affiliation: Office of Research and Innovation

Position: Other Institution: University of Northern B.

Phone1: 250-960-5629 Email: shaheen.balogh@unbc.ca Phone2: Fax: Alternate Address:

Primary Address: 3333 university way Prince George, BC V2N 4Z9 Location: C204 2000

Preferred Address: Primary Address Alternate Address Country: Canada

Comments:

Other Project Member Info: Do not hand type data for this section. To add more project team members to this application form, click Add New to search for and select from other researcher profiles. Click [?] for more info.

Add New

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

A pop-up window will open. Do NOT hand type your information into the boxes or it will not link to your profile and you will not be able to access the application. Instead, to add your information, click “**Search Profiles**” (red arrow below). Another window will open. Type your first and/or last name into the search fields and click “Search”. Select your profile from the list and click “Select”.

**If you are a student working on your thesis/project research, as lead investigator, please indicate your role in the project as the “Principal Applicant” from the “Role in Project” drop-down menu (green arrow below).**

Click “**Save**” (blue arrow below) before moving to the next tab.

Project Team Member Edit

Save Close

### Project Team Member Info

Do not hand type data for this section. To add more project team members to this application form, click Add New to search for and select from other researcher profiles. Click [?] for more info.

Search Profiles Refresh

Prefix: Last Name: First Name:

Affiliation:

Role In Project: Administrator Country: Institution:

Position: Email: Fax: Phone1: Phone2:

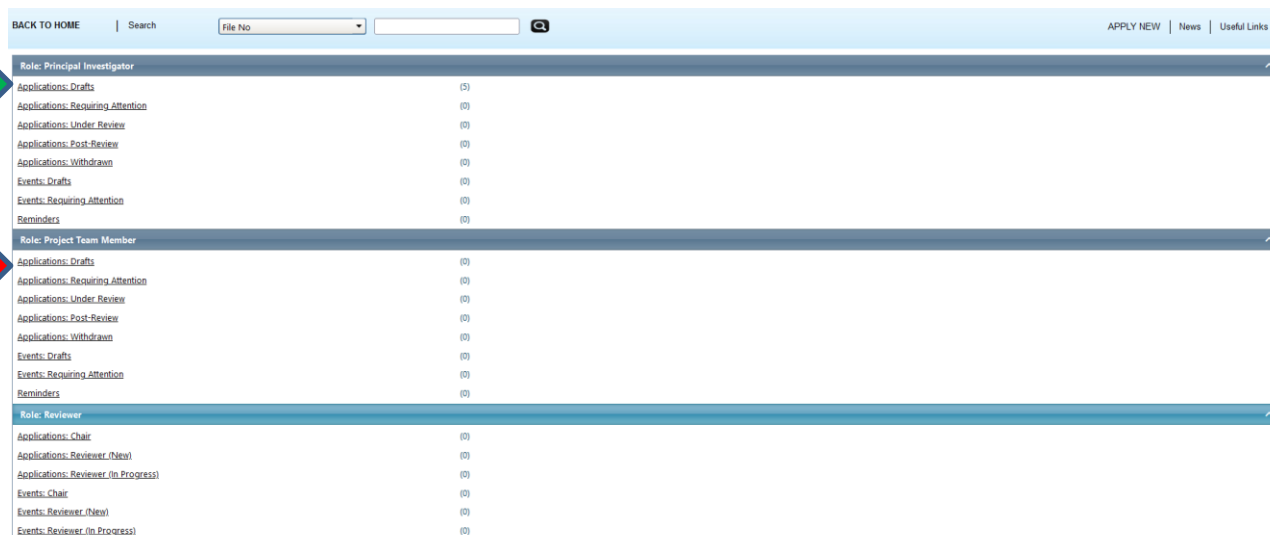
Primary Address: Mailing Alternate Address:

Use Of Address: Primary Address Alternate Address

Comments:

Once this step has been completed, if you save your application to continue working on it at a later time, after logging into the Romeo Research Portal the application can be located for editing:

- As a student, the application will be found under “Role: Project Team Member” under the “Applications: Drafts” (red arrow below);
- As the Principal Investigator (academic supervisor), the application will be found under “Role: Principal Investigator” under the “Applications: Drafts” (green arrow below).



BACK TO HOME | Search | File No. | APPLY NEW | News | Useful Links

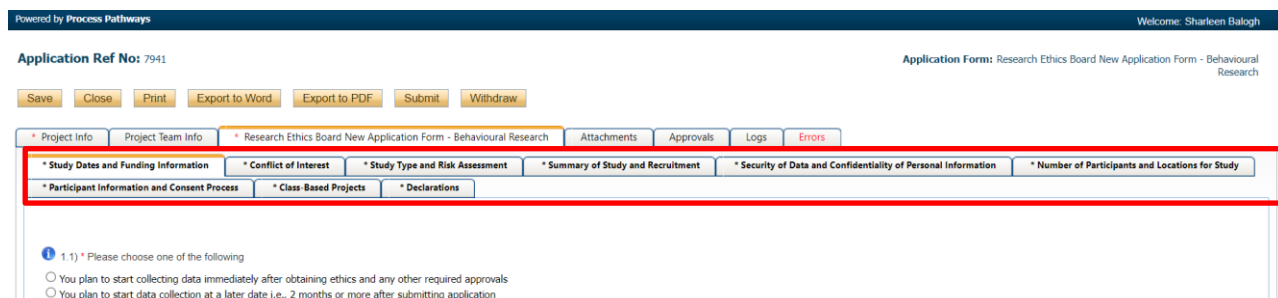
Role: Principal Investigator	
Applications: Drafts	(5)
Applications: Requiring Attention	(0)
Applications: Under Review	(0)
Applications: Post-Review	(0)
Applications: Withdrawn	(0)
Events: Drafts	(0)
Events: Requiring Attention	(0)
Reminders	(0)

Role: Project Team Member	
Applications: Drafts	(0)
Applications: Requiring Attention	(0)
Applications: Under Review	(0)
Applications: Post-Review	(0)
Applications: Withdrawn	(0)
Events: Drafts	(0)
Events: Requiring Attention	(0)
Reminders	(0)

Role: Reviewer	
Applications: Chair	(0)
Applications: Reviewer (New)	(0)
Applications: Reviewer (In Progress)	(0)
Events: Chair	(0)
Events: Reviewer (New)	(0)
Events: Reviewer (In Progress)	(0)

7. Proceed to the “**Research Ethics New Application**” tab. You will see a screen similar to the one below. Answer all of the applicable questions under all of the sub-tabs shown in the red rectangle below. You can open a sub-tab by clicking on its title. Questions with a red asterisk (\*) are mandatory, but please answer all questions relevant to your application.

Click on “**Save**” to save the information on the sub-tab before moving onto another sub-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.



Powered by Process Pathways | Welcome: Sharleen Balogh

Application Ref No: 7941 | Application Form: Research Ethics Board New Application Form - Behavioural Research

Save | Close | Print | Export to Word | Export to PDF | Submit | Withdraw

Project Info | Project Team Info | **Research Ethics Board New Application Form - Behavioural Research** | Attachments | Approvals | Logs | Errors

**\* Study Dates and Funding Information** | **\* Conflict of Interest** | **\* Study Type and Risk Assessment** | **\* Summary of Study and Recruitment** | **\* Security of Data and Confidentiality of Personal Information** | **\* Number of Participants and Locations for Study**

**\* Participant Information and Consent Process** | **\* Class-Based Projects** | **\* Declarations**

1.1) \* Please choose one of the following

☐ You plan to start collecting data immediately after obtaining ethics and any other required approvals

☐ You plan to start data collection at a later date i.e., 2 months or more after submitting application

8. Proceed to the “**Attachments**” tab. You will see a screen that gives instructions for uploading necessary documents. There is a tick list provided to indicate which documents are necessary for the research study. Please ensure all are attached to the application, using a consistent and informative naming convention (e.g., consent\_form\_v1\_date).

It is extremely helpful to include the date and version number of a document in the file name, and in the footer of all participant facing documents:

- TCPS2 CORE Certificate (required for all undergraduate and graduate student researchers engaged in human participant research)
- Other REB approvals, for multi-jurisdictional research
- Consents from Aboriginal groups or organizations
- Other required consents for research sites or populations
- Safe Research Plan for In-Person Research involving populations that may face increased risk of COVID-19, or communities where local policies and protocols are in place regarding the pandemic
- Participant recruitment materials (e.g. posters, letters, email scripts, and media advertisements)
- Participant information letter(s)
- Participant consent form(s)
- Interview protocols, questionnaires, survey instruments (As per TCPS2, Article 10.5, in studies using emergent design in data collection, final versions of questionnaires or interview schedules must be submitted to the REB as soon as they become available)
- Research assistants/transcriber confidentiality agreement(s)
- Research contract(s)
- Research Proposal

Begin by clicking on “**Add Attachment**” (red arrow below).

The screenshot shows the 'Research Ethics Board New Application Form - Behavioural Research' interface. The 'Attachments' tab is active. A red arrow points to the 'Add Attachment' button. The interface includes a header with 'Powered by Process Pathways' and 'Welcome: Sharleen Balogh'. The 'Application Ref No: 7941' is displayed. Below the header, there are buttons for 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', 'Submit', and 'Withdraw'. The 'Attachments' tab is selected, showing a list of documents to be attached: 'Research Proposal (required)' and 'Any interview questions or survey questions to be used, if applicable'. A note at the bottom states: 'NOTE : The maximum individual attachment size is 10MB. All attachments larger than 10MB will stall the system, and your data may be lost. However, you may upload multiple attachments, provided that each is no larger than 10MB.'

A pop-up window will open. To upload an attachment, click the “**Browse**” button (red arrow below). Enter a Description, if applicable. Enter the date of submission as the “**Version Date**” (green arrow below). Under the “**Doc Agreement**” pull-down menu (blue arrow below), select the type of document you are uploading (research proposal, consent forms, recruitment posters, etc.) Click on “**Add Attachment**” (purple arrow below).



Powered by Process Pathways

Welcome: Sharleen Balogh

Application Ref No: 7941

Application Form: Research Ethics Board New Application Form - Behavioural Research

Save Close Print Export to Word Export to PDF Submit

Project Info Project Team Info Research Ethics Board New Application Form

Please attach the following documents:  
Research Proposal (required)  
Any interview questions or survey questions to be used, if applicable

Add Attachment

NOTE: The maximum individual attachment size is 10MB. All attachments larger than 10MB will be rejected. However, you may upload multiple attachments, provided that each is no larger than 10MB.

Upload Attachment

Description:

Upload Attachment:  Browse

Allowed File Types:  
jpeg, jpg, png, doc, docx, xls, xlsx, txt, pdf, ppt, pptx, pps, ppsx, msg

Allowed File Size: 10 MB

Version Date:

Doc Agreement: --Select One--

Add Attachment Cancel

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

9. “**Approvals**” tab. There is no information to be entered in this section. The application will automatically route to the Office of Research and Innovation Research Ethics Board for processing.

Powered by Process Pathways

Welcome: Sharleen Balogh

Application Ref No: 7941

Application Form: Research Ethics Board New Application Form - Behavioural Research

Save Close Print Export to Word Export to PDF Submit Withdraw

Project Info Project Team Info Research Ethics Board New Application Form - Behavioural Research Attachments Approvals Logs Errors

**Approvals**

This application is pre-programmed to route to the following signing authority levels

Role	Active	Exceptions
Division Signing Authority	<input type="checkbox"/>	
Department Signing Authority	<input type="checkbox"/>	
Faculty Signing Authority	<input type="checkbox"/>	
Office of Research Services/Office of Research Ethics	<input checked="" type="checkbox"/>	

10. “**Logs**” tab. There is no information to be entered in this section. You can toggle between “**Application Workflow Log**”, “**Application Log**”, and “**Shared Communications**” to see where your application is at in the approval process, and to see any relevant log or communication activity.

Powered by Process Pathways

Welcome: Sharleen Balogh

Application Ref No: 7941

Application Form: Research Ethics Board New Application Form - Behavioural Research

Save Close Print Export to Word Export to PDF Submit Withdraw

Project Info Project Team Info Research Ethics Board New Application Form - Behavioural Research Attachments Approvals Logs Errors

☒ Application Workflow Log ☐ Application Log ☐ Shared Communications

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

11. **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.

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

13. When you are ready to submit the application, click “**Submit**” (red arrow below) and the application will be routed to the Office of Research and Innovation.

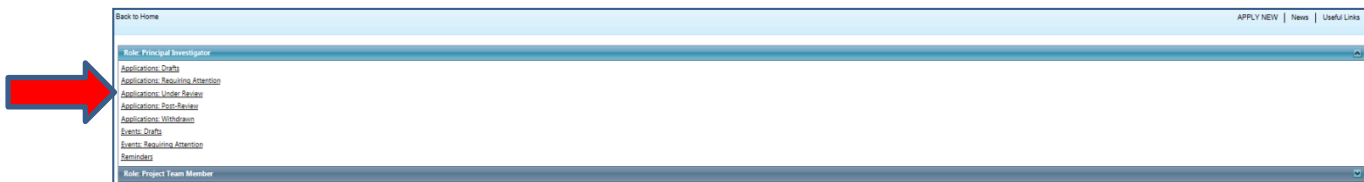
**PLEASE NOTE: If you are a student, or a researcher under supervision, your academic supervisor MUST submit the application from their own Romeo account (after changing the PI and adding yourself as a Project Team Member with the role of “Principal Applicant” described in Step 6 above). If the application is submitted from a student account, it will be returned to the student by the Office of Research and Innovation for re-submission by the Faculty Supervisor. This enables the supervisor to review all materials that are being forwarded for review under their professional responsibility for the conduct of the study.**

14. At any time, you can view the status of your application either:

a) under an individual application's “**Logs**” tab, or

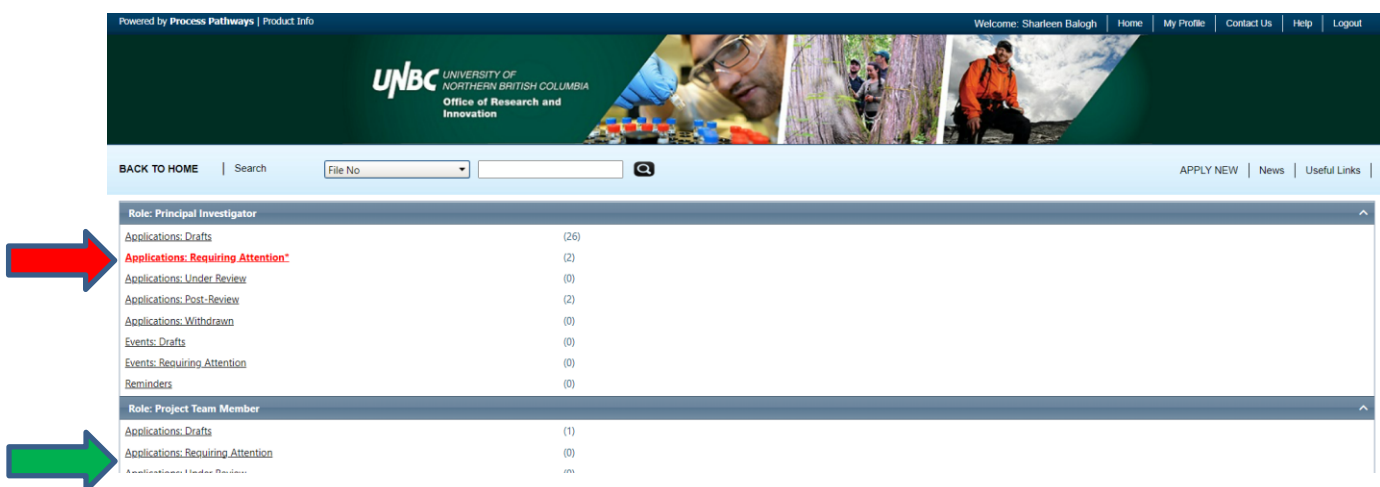


b) from the Home screen, under “**Applications: Under Review**”.



15. After the REB has reviewed your application and made their approval decision, you will receive an email from [do-not-reply-unbc@researchservicesoffice.com](mailto:do-not-reply-unbc@researchservicesoffice.com) indicating whether your application has been approved or if provisos have been issued. If revisions are required, you will receive a Requested Changes Memo from the UNBC Research Ethics Board attached to the email, detailing the changes suggested from the review.

16. To revise your application, log in to your Romeo account (following the instructions in Steps 1 and 2 above). The application that requires attention will be highlighted in red text (“**Applications: Requiring Attention**”) under either the “**Role: Principal Investigator**” list (red arrow below) or the “**Role: Project Team Member**” list (green arrow below), depending on your role in the application.



Click on the appropriate Quick Link. A new window will open, listing all applications in that category that require your attention. Locate the correct file and click “**Edit**” (red arrow below).

Powered by Process Pathways | Product Info

Welcome: Sharleen Balogh | Home | My Profile | Contact Us | Help | Logout

UNBC UNIVERSITY OF NORTHERN BRITISH COLUMBIA  
Office of Research and Innovation

BACK TO HOME | Search | File No: [ ] | [ ]

APPLY NEW | News | Useful Links

Reset Filters | Export To Excel

	File No	Project Title	Principal Investigator	Application Type	Status Snapshot
<a href="#">Workflow</a> <a href="#">View</a> <a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Latest Workflow</a>	6007887	Test application #6	Ms. Sharleen Balogh (Office of Research and Innovation)	Research Ethics Board New Application Form - Behavioural Research (Certification/Human Ethics)	Project Status: Pending Workflow Status: Pending Info by ORS
	6007878	Test application 4	Ms. Sharleen Balogh (Office of Research and Innovation)	Research Ethics Board New Application Form - Behavioural Research (Certification/Human Ethics)	Project Status: Pending Workflow Status: Pending Info by ORS

17. The application will open.

Please make any changes directly within the Romeo application by clicking on each tab and revising your responses as required.

**Revised support documentation** (i.e., consent forms, recruitment posters, etc.) can be attached to the “**Attachments**” tab (as in Step 8 above, ). Please identify any changes to the support documentation by underlining and **highlighting** new text and ~~striking through~~ removed text from the original submission. Please provide each revised document with a new name using a consistent and informative naming convention (e.g., consent\_form\_v2\_date).

Please also upload a **Response Letter** to the "Attachments" tab. Please copy the provisos listed in your letter requesting changes received from the REB, paste them into a blank document, and provide an explanation or justification below each proviso of the changes made, or not made. Please save the letter (e.g., Response\_Letter\_v1\_date) and attach it to the "Attachments" tab. Select the “**Researcher’s Response Letter to REB Requested Changes**” from the “**Doc Agreement**” drop-down list (red arrow below).

Upload Attachment

Description: [ ]

Upload Attachment: [ ] Browse

Allowed File Types:  
jpeg, jpg, png, doc, docx, xls,xlsx,txt, pdf, ppt, pptx, pps, ppsx, msg

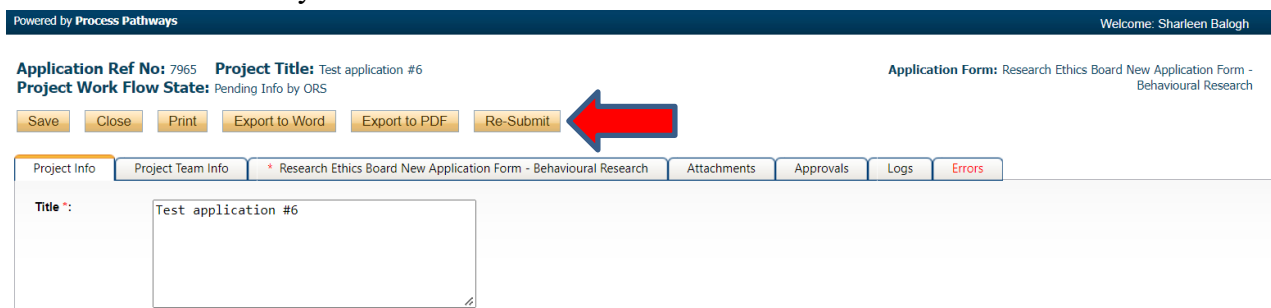
Allowed File Size: 10 MB

Version Date: [ ]

Doc Agreement: --Select One--

Add Attachment Cancel

18. When you are ready, click to “**Re-Submit**” your application (red arrow below) to the Office of Research and Innovation. If you are a student, you will need to notify your supervisor so that they can re-submit it from their own Romeo account on your behalf. This enables the supervisor to review all materials that are being forwarded for review under their professional responsibility for the conduct of the study.



The screenshot displays the 'Research Ethics Board New Application Form - Behavioural Research' interface. At the top, it shows 'Application Ref No: 7965' and 'Project Title: Test application #6'. The 'Project Work Flow State' is 'Pending Info by ORS'. A row of buttons includes 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', and 'Re-Submit'. A large red arrow points to the 'Re-Submit' button. Below the buttons is a tabbed interface with 'Project Info' selected. The 'Title' field contains 'Test application #6'.

19. The application will be automatically routed back to the Office of Research and Innovation for review by the REB. If further revisions are required, you will be notified by email, as you were with the initial provisos.