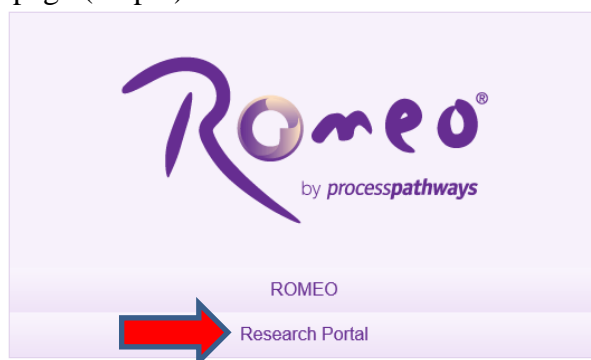# Romeo

## 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.

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.
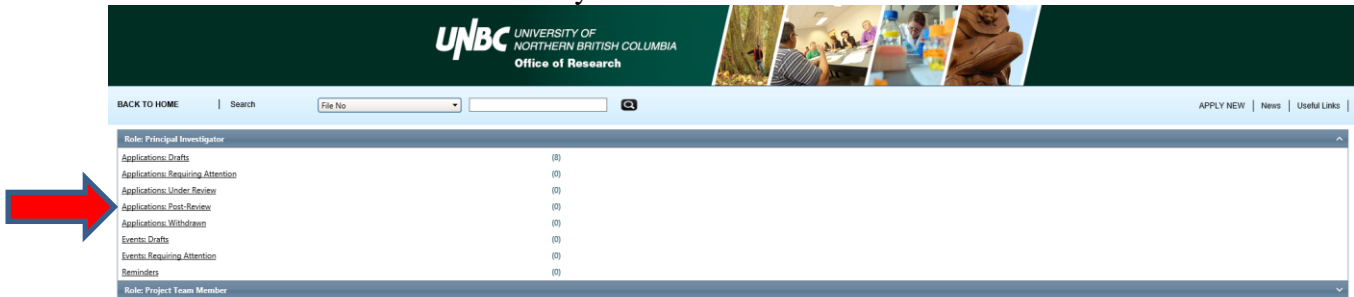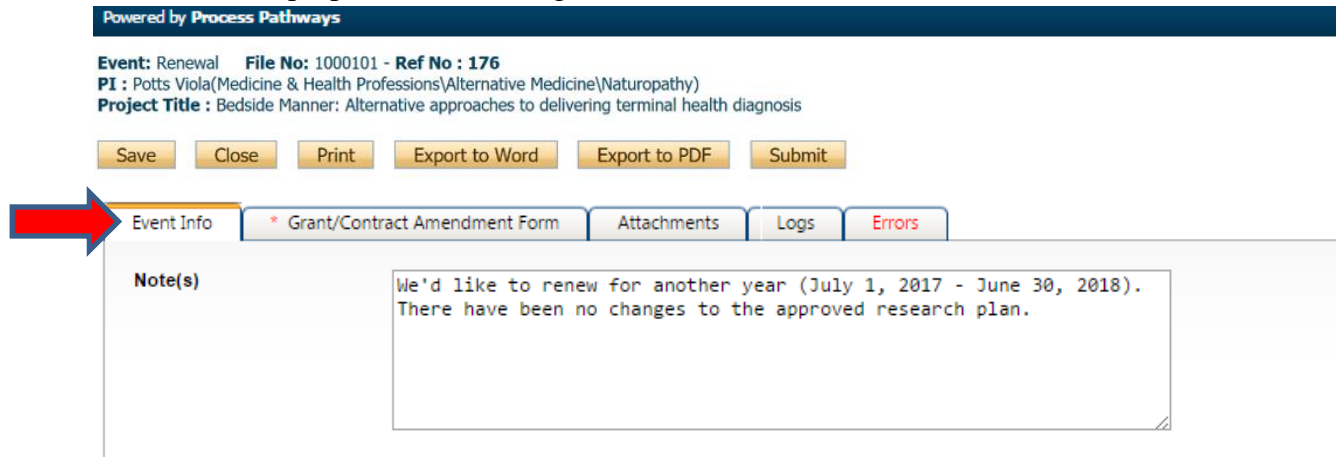


You will be brought to a screen (similar to the one below), which lists your previous applications, and the options available for each application. Click on the "**Events**" button next to the relevant application.



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.

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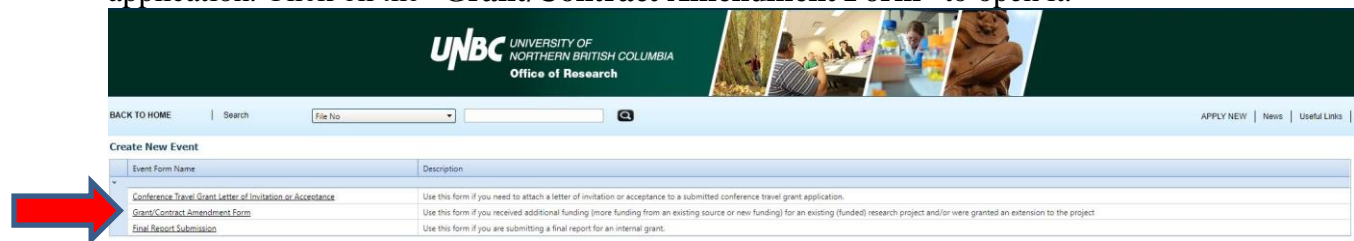
4. You will be brought to a screen similar to the one below. Under the "**Event Info**" tab, enter general comments about the event form in the "**Note(s)**" text box. For example, you may wish to summarize the purpose of submitting the event form.
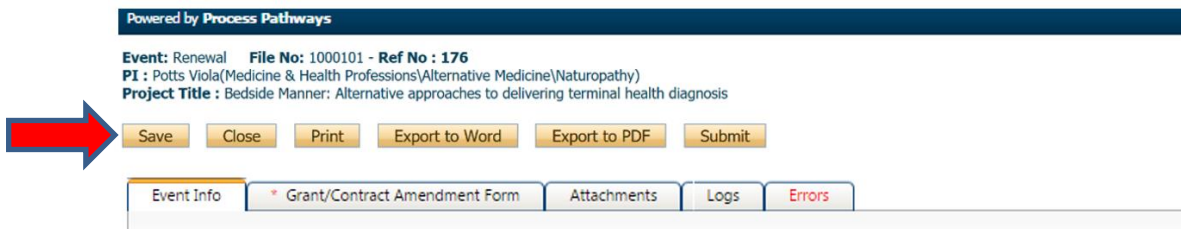


5. Click "**Save**" before moving to the next tab.  At any time, you can save your application and continue working on it at a later time. It is always good practice to save your application before changing tabs or leaving the application for an extended period of time.



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.

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



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**."
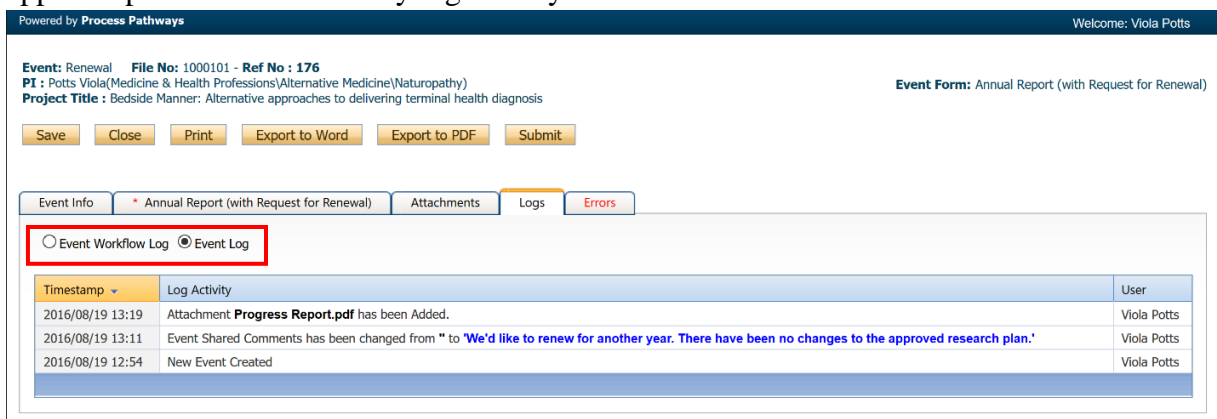


Click "**Save**" to save the information on this page.

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.

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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.



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.



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



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

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