

# 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 and Innovation at [research@unbc.ca](mailto:research@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 (<https://www2.unbc.ca/office-research-and-innovation>). This link will take you directly to the login page (Step 2).



2. Login using your UNBC sign in (username@unbc.ca) and password. If you do not have a Romeo account, you will see a screen similar to that below. Click on the link for the “self-registration page” to create an account or contact the Office of Research and Innovation at [research@unbc.ca](mailto:research@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.

### Romeo Researcher Portal

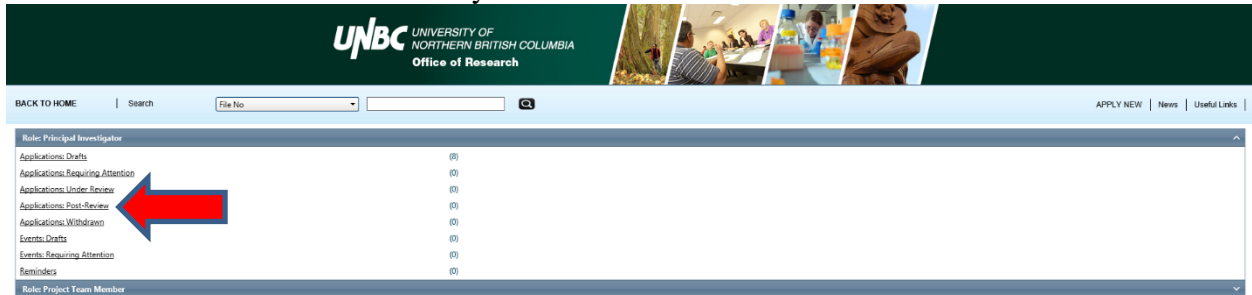
**Access Denied – You are not authorized to access the Romeo Researcher Portal.**

If you already have an account on Romeo, please contact [researchportal@unbc.ca](mailto:researchportal@unbc.ca).

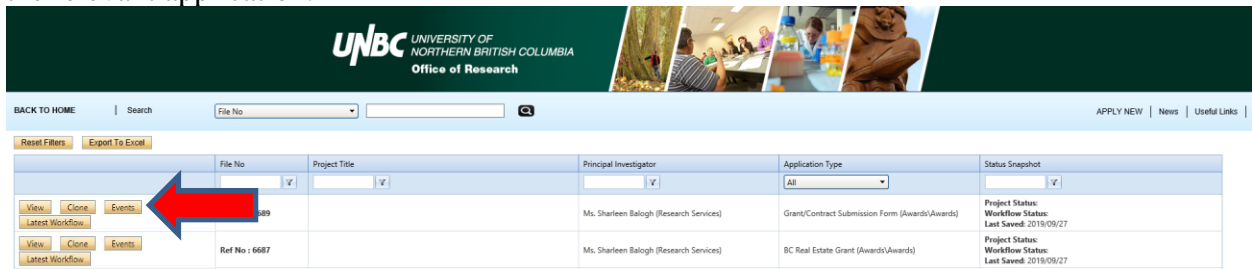
If you do not yet have an account on Romeo, please visit the [self-registration page](#) to complete your registration.

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.

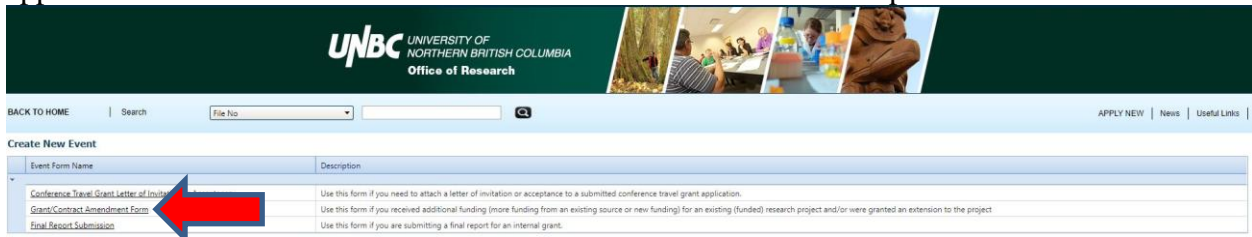
To access event forms, click on the “**Applications: Post-Review**” link on your Romeo home page (see below). You can also access event forms via the “**Reminders**” link when an event form submission is due within 30 days.



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.

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 ← /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 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.

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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, .bmp, .doc, .rtex, .xls, .docx, .txt, .pdf, .ppt, .pptx, .ppsx, .xlsx, .mng  
 Allowed File Size: 10 MB

Version Date:

Doc Agreement: --Select One--

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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**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 <b>Progress Report.pdf</b> 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.

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**Project Title :** Bedside Manner: Alternative approaches to delivering terminal health diagnosis **Event Form:** Annual Report (with Request for Renewal)

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

**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.

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11. When you are ready, click to **“Submit”** your event form. Once you do so, a Work Flow Action comment box will pop up. If you have any additional comments, enter them here. Please do not put any confidential or sensitive information in the comment box, as this can be seen by Office of Research and Innovation staff, signing authorities, and reviewers. When you submit, your application 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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Save   Close   Print   Export to Word   Export to PDF   Submit

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