

Romeo

How to Submit an External Grant/Contract Application Form

Please use this form to submit an external grant/contract application for a NEW project. If you are making changes to an existing project, such as applying for a change to the end date of your project or you have received new or additional funding for a project, please complete a Grant/Contract Amendment Form (Event Form).

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 250-960-5852 or email researchportal@unbc.ca

Please also note: the process to apply for an external grant or to submit contract details is the same. The external grant application process will be used as an example in this document.

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 and Innovation 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 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 and Innovation 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.

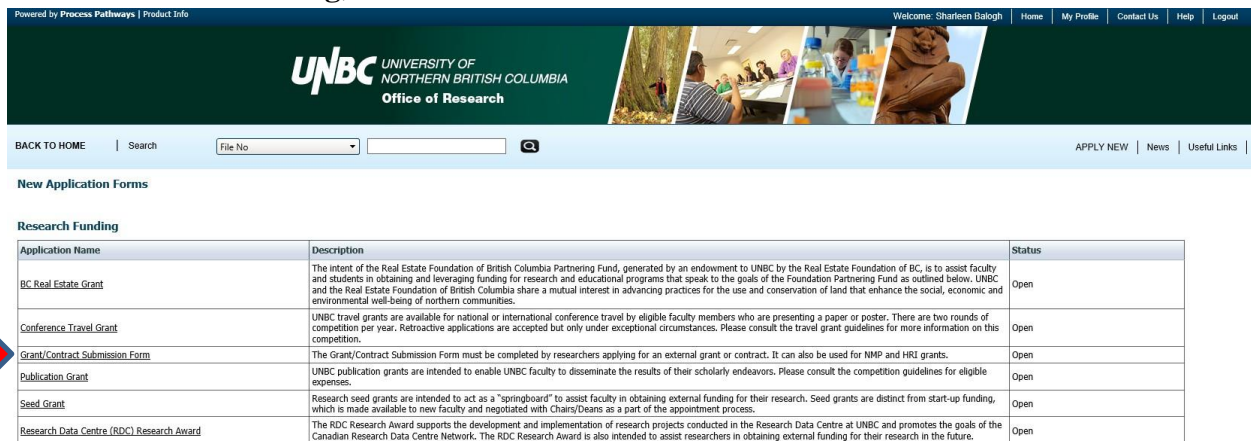
If you do not yet have an account on Romeo, please visit the [self-registration page](#) to complete your registration.

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 Funding**, select “**Grant/Contract Submission 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.

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.

Application Ref No: 6689 Application Form: Grant/Contract Submission Form

Save Close Print Export to Word Export to PDF Submit Withdraw

* Project Info Project Team Info Project Sponsor Info * Grant/Contract Submission Form Attachments Approvals Logs Errors

Title :

Start Date:

End Date:

Keywords: Add

Related Certifications

- Click Search to attach an existing certification
- Click Add New to attach a certification not yet submitted to a review committee

Add New Search

Certification Category	File No	Status	Renewal Date	Notes
No records to display.				

Related Certifications: If you require any certifications for this project (Animal Care, Human Ethics, Biohazard, Environmental Impact, or Radiation), click on “Add New” (see below).

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Title :

Start Date:

End Date:

Keywords: Add

Related Certifications

- Click Search to attach an existing certification
- Click Add New to attach a certification not yet submitted to a review committee

Add New Search

Certification Category	File No	Status	Renewal Date	Notes
No records to display.				

A small “Project Certification” window will open. Select the certification you require from the drop-down list and enter any comments in the “Notes” section (e.g. application pending approval of funding, etc.). Click “Save”. You can add multiple certifications, as needed.

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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Title :

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 if your profile information is incorrect or out-of-date.

If you are not the PI, click the “**Change PI**” button (red arrow below). This will open a pop-up window where you can search for and select an alternate UNBC researcher profile. Keep in mind, only the PI can submit the form. Therefore, if the PI is not from UNBC, please enter the contact information of the Project PI in the comments box of the PI tab, rather than formally changing the PI information. NOTE: if you remove yourself as PI, you will need to add yourself as a project team member, otherwise you will no longer be able to access the application.

If there are other UNBC project team members, you will need to add them under “**Other Project Member Info**” (see below). To add project members, click on “**Add New**” (green arrow below). A pop-up window will open. Click “**Search Profiles**” to open another window to search for and select your team member(s) by name. If the researcher is not on the list, you can add the individual on this page, “register” the individual yourself from the login page, or contact the Office of Research and Innovation to have the investigator added to the database (please provide the Office with all of the contact information). Always remember to search before creating a new profile, as duplicate profiles will need to be deleted. Click “**Save**” to save this page. Repeat this process for all additional team members.

Please note: once added as a team member on an application, an individual will receive copies of internal emails that are generated as the application moves through the Romeo approval process. Therefore, please add the contact information for external co-applicants in the comments box of the PI tab, rather than formally adding them as team members.

Click on “**Save**” (blue arrow below) to save the information entered on this page.

The screenshot shows the 'External Grant Application Form' interface. At the top, there are navigation buttons: Save, Close, Print, Export to Word, Export to PDF, and Submit. A blue arrow points to the 'Save' button. Below the navigation is a breadcrumb trail: Project Info > Project Team Info > Project Sponsor Info > External Grant Application Form > Attachments > Approvals > Logs > Errors. The main section is titled 'Principal Investigator' and contains instructions: '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.' Below the instructions are fields for: Change PI (with a red arrow pointing to it), Refresh, Prefix (Mrs.), Last Name (Balliet), First Name (Nicole), Affiliation (College of Arts, Social and Health Sciences/Anthropology), Rank, Gender (Female), Institution (University of Northern Br.), Phone1 (250-950-5815), Email (nicole.balliet@unbc.ca), Phone2, Fax (250-950-5382), Primary Address (3333 Dalvesisity Way, Prince George, BC V2N 4Z2), Alternate Address, Preferred Address (Primary Address selected), Country (Canada), and a Comments box. At the bottom, there is a section for 'Other Project Member Info' with instructions: 'Instructions: Do not hand type data for this section. To add more project team members to this application file, click the Add New button to search for and select from other researcher profiles.' Below this is an 'Add New' button (with a green arrow pointing to it) and a table with columns for Last Name, First Name, and Role In Project. The table currently shows 'No records to display.'

7. Proceed to the “**Project Sponsor Info**” tab. This is the tab where you will indicate the agency to which you are applying, and the amount of money you are requesting. You will see a screen similar to the one below. Click “**Add New**”.

Application Ref No: 6589 Project Title: Application Form: Grant/Contract Submission Form
 Project Work Flow State: Pre-Submission

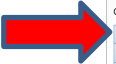
Save Close Print Export to Word Export to PDF Submit Withdraw

Project Info Project Team Info **Project Sponsor Info** Grant/Contract Submission Form Attachments Approvals Logs Errors

Click Add New to add funder and per fiscal year budget details for this project.

Add New

Investigator	Agency	Program	Total Requested Amount
No records to display.			



A pop-up window will open. Click on “**Agency**” (red arrow below). Another window will open, and you can search for the funding agency you are applying to. You may conduct a search using either the agency name or abbreviation (e.g. NSERC/SSHRC/CIHR). If the agency does not appear when searching using the abbreviation, please use the full name and search again. If the agency you are applying to is not in the list, please contact the Office of Research and Innovation with the details. Click on “**Select**” to choose the agency.

Once you have selected the funding agency, click on the drop-down list beside “**Program**” (green arrow below) and select the program to which you are applying (e.g. Discovery Grants, Insight Development Grants, etc.). If the program you are applying to is not in the list, please contact the Office of Research and Innovation with the details.

Enter the anticipated **Start Date** and **End Date**. Enter the agency application deadline as the **Competition Date**, if applicable. The **Currency Type** should always be CAD. If there are sponsor-related comments that you would like to make, please do so in the “**Comments**” box.

A new **funding disbursement** will need to be entered for each year of funding. Click “**Generate**” (blue arrow below) and a table with fiscal dates will be generated, where you can then add the appropriate disbursements for each period.

Sponsor Info.

Agency:

Program:

Investigator: Ms. Melanie Noullet (Principal Investigator)

Competition Date:

Start Date:

End Date:

Currency Type: Canadian Dollars (CAD)

Comments:

To generate disbursement table, enter Start and End Dates above and click GENERATE. To add or delete fiscal year rows after first generate, edit Start Date and End Date above, and click GENERATE to refresh the per fis



Year	Start Date	End Date	Requested Cash	Requested In-Kind	Requested Overhead
No records to display.					

Save Close

In the appropriate boxes (see below), enter the **requested cash** that will be coming to UNBC (rather than the overall grant requested, if you are a co-applicant on a grant application, for example). Funds should be entered in CAD (if funding is to be provided in another currency, please indicate the original currency in the comments section and include the original amount, exchange rate and date).

Enter **requested in-kind** (if any) from the *same* sponsor (you will need to add a new sponsor if the in-kind contribution(s) come from a separate sponsor(s)).
Please note: All in-kind contributions need back-up (e.g. letter of support, email, quotation, etc.) indicating the level of support.

Leave the requested overhead field blank. Enter the percentage overhead requested in the comments box (UNBC’s standard rate is 25% unless the funder has a different stated maximum). Remember to click **“Save”** before closing this page. Click on **“Save”** again to save the entire Sponsor Info. page.

To generate disbursement table, enter Start and End Dates above and click GENERATE. To add or delete fiscal year rows after first generate, edit Start Date and End Date above, and click GENERATE to refresh the per fiscal year disbursement table.

GENERATE

Year	Start Date	End Date	Requested Cash	Requested In-Kind	Requested Overhead	Awarded Cash	Awarded In-Kind	Awarded Overhead
2020	2019/09/01	2020/03/31	0.00	0.00	0.00	0.00	0.00	0.00
2021	2020/04/01	2020/08/30	0.00	0.00	0.00	0.00	0.00	0.00
			0.00	0.00	0.00	0.00	0.00	0.00

Save Close

NOTE: If there are multiple sponsors/partner organizations for your project, you will need to repeat the process described above (Step 7) for each sponsor/partner organization.

8. Proceed to the **“Grant/Contract Submission Form”** tab. You will see a screen similar to the one below. Answer all of the applicable questions under the **“Grant/Contract Application Form”**, **“UNESCO Goals”**, **“Certifications and Registrations”**, and **“Declarations”** tabs. Questions with a red asterisk (*) are mandatory, but please answer all questions relevant to your application. Please note that these questions are for internal use only and are not used in the external assessment of your application in any way. Click on **“Save”** to save the information on the page.

Application Ref No: 5689 Project Title: Application Form: Grant/Contract Submission Form
Project Work Flow Status: Pre-Submission

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* Project Info Project Team Info Project Sponsor Info * Grant/Contract Submission Form Attachments Approvals Logs Errors

* Grant/Contract Application Form * UNESCO Goals * Certifications and Registrations * Declarations

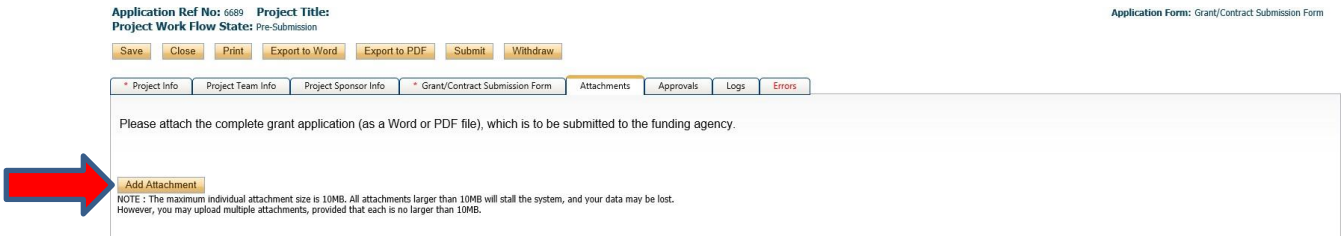
1.1) * Application type:
Please select Grant, Contract or donation/gift
 Grant
 Contract
 Donation/Gift

1.2) * Location of research:
Please identify the geographic locations of your research.

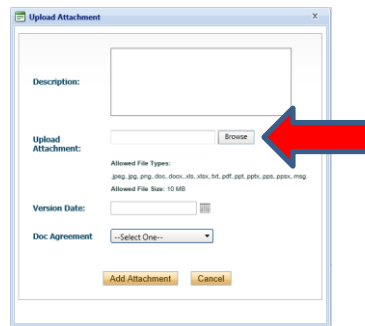
1.3) * Please specify university facilities required beyond those that are currently available to you.
Please identify any additional space required for this project. If no additional space is required, please enter "none".

1.4) * Is First Nations / Aboriginal / Indigenous consultation required?
Please check "yes" or "no".
 Yes
 No

9. Proceed to the “**Attachments**” tab. You will see a screen similar to the one below. This is where you can upload any required attachments to the application (e.g. CV, application form, contract details, etc.). Begin by clicking on “**Add Attachment**”.

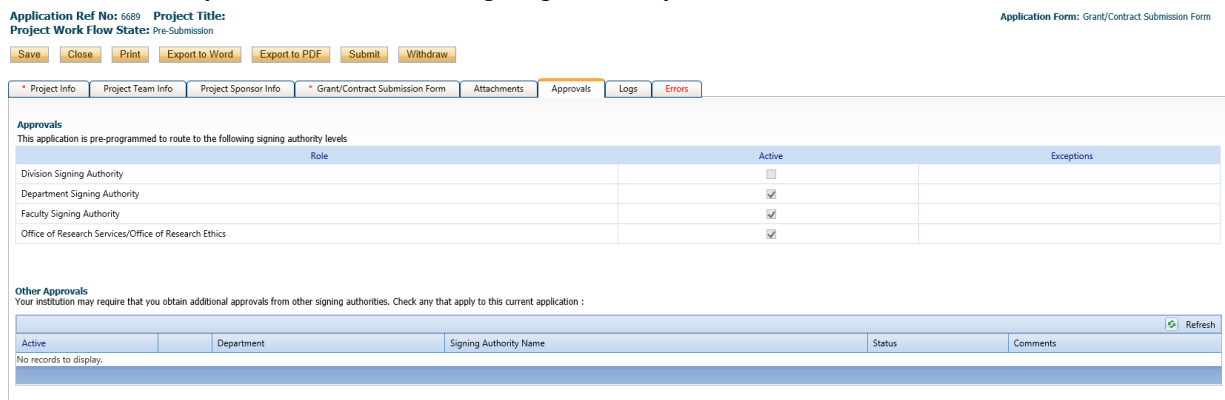


A pop-up window will open. To upload an attachment, click the “**Browse**” button (see below). Enter a **Description**, if applicable. Enter the date of submission as the “**Version Date**”. Under the “**Doc Agreement**” pull-down menu, select the type of document you are uploading (Application, Budget,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



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

10. “**Approvals**” tab. There is no information to be entered in this section. Applications are automatically routed to the next signing authority (as indicated).



11. “**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 log or communication activity.

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Application Workflow Log Application Log Shared Communications

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

12. “**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 Info ->Project Title is required.

Grant/Contract Submission Form -> Grant/Contract Application Form:1.1 Application type: is required.

Grant/Contract Submission Form -> Grant/Contract Application Form:1.2 Location of research: is required.

Grant/Contract Submission Form -> Grant/Contract Application Form:1.3 Please specify university facilities required beyond those that are currently available to you: is required.

Grant/Contract Submission Form -> Grant/Contract Application Form:1.4 Is First Nations / Aboriginal / Indigenous consultation required? is required.

Grant/Contract Submission Form -> Grant/Contract Application Form:1.7 Is intellectual property anticipated? is required.

Grant/Contract Submission Form -> Grant/Contract Application Form:1.8 Is there an agreement on ownership of intellectual property? is required.

13. **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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When you are ready, click to “**Submit**” your application. It will automatically be forwarded to the next signing authority. You will receive confirmation emails each time the application is forwarded and approved through the workflow. If you notice that the application is not moving through the approval process, please follow up with your Chair or Dean. If at any time, further information is required, you will receive an email indicating such.

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14. At any time, you can view the status of your application either:
 a) under an individual application’s “**Logs**” tab, or

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

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Role: Principal Investigator

- Applications Drafts
- Applications Requiring Attention
- Applications Under Review
- Applications Post-Status
- Applications Withdrawn
- Events Drafts
- Events Requiring Attention
- Reminders

Role: Project Team Member

