

# Romeo

## How to Submit an Application for a SSHRC Institutional Grant (SIG) Explore or Exchange Grant

Please use this form to submit an application for a SSHRC Institutional Grant (SIG) Explore or Exchange Grant.

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 [researchportal@unbc.ca](mailto: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 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](mailto: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 [researchportal@unbc.ca](mailto: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](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. 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 “**SSHRC SIG Explore/Exchange Grants**”.

**Research Ethics**

Application Name	Description	Status
<a href="#">Research Ethics New Application Form</a>	Please use this form for all UNBC single-jurisdiction projects. Studies may involve the study of patients or healthcare providers and retrospective chart reviews. Studies also may involve interviews, focus groups, observations, the administration of questionnaires or tests, or retrospective chart review (where no clinical interventions are performed as part of the study). They do not include performing clinical interventions or multi-jurisdictional studies eligible for harmonized ethical review. Clinical interventions are defined as: the administration or testing of drugs, medical devices, medical imaging or diagnostic techniques; and the taking of blood or other specimens. Please note multi-jurisdictional studies that wish to be reviewed through Research Ethics British Columbia (REBC) are NOT to be submitted through Romeo, but instead should be submitted through the Provincial Research Ethics Platform (PREP)/RISE. Please follow instructions found on the Research Ethics BC webpage [https://researchethicsbc.ca/apply-for-ethics-review/].	Open

**Research Funding**

Application Name	Description	Status
<a href="#">Grant/Contract Submission Form</a>	The Grant/Contract Submission Form must be completed by researchers applying for an external grant or contract. It can also be used for NMP and H&I grants.	Open
<a href="#">BC Real Estate Grant</a>	The intent of the Real Estate Foundation of British Columbia Partnering Fund, generated by an endowment to UNBC by the Real Estate Foundation of BC, is to assist faculty and students in obtaining and leveraging funding for research and educational programs that speak to the goals of the Foundation Partnering Fund as outlined below. UNBC and the Real Estate Foundation of British Columbia share a mutual interest in advancing practices for the use and conservation of land that enhance the social, economic and environmental well-being of northern communities.	Open
<a href="#">Research Data Centre (RDC) Research Award</a>	The RDC Research Award supports the development and implementation of research projects conducted in the Research Data Centre at UNBC and promotes the goals of the Canadian Research Data Centre Network. The RDC Research Award is also intended to assist researchers in obtaining external funding for their research in the future.	Open
<a href="#">General Research Fund (GRF) Application Form</a>	These grants aim to enhance the quality of research in the natural sciences and engineering or in the social sciences and humanities.	Open
<a href="#">Research Strategic Initiatives Grant (RSIG)</a>	The Office of Research and Innovation is committed to promoting and enhancing research capacity at UNBC. As such, and to better respond to the needs of the UNBC research community, the Office of Research and Innovation has replaced the individual internal grant competitions with the Research Strategic Initiatives Grant (RSIG).	Open
<a href="#">SSHRC SIG Explore/Exchange Grants</a>	Funded by a SSHRC Institutional Grant (SIG), Explore and Exchange Grants provide funding for small-scale research and research-related activities in the social sciences and humanities.	Open
<a href="#">UNBC/NH MOU Project Application</a>	Use this form to apply for funding to support projects affiliated with the UNBC/NH MOU	Open

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: 8376

Application Form: SSHRC SIG Explore/Exchange Grants

Save Close Print Export to Word Export to PDF Submit Withdraw

\* Project Info Project Team Info Project Sponsor Info \* SSHRC SIG Explore/Exchange Grants Attachments Approvals Logs Errors

Title :

Start Date:

End Date:

Keywords:

Add

Clear all

## 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

Clear all

## 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. 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.

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

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**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: Ms Last Name: Balogh First Name: Sharleen

Affiliation: Office of Research and Innovation

Position: Other Institution: University of Northern Br

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

Primary Address: 3333 University Way Prince George, BC V2N 4Z9 Location: C394 2008

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.		

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

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Application Form: SSHRC SIG Explore/Exchange Grants

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

[\\* Project Info](#) [Project Team Info](#) [Project Sponsor Info](#) [\\* SSHRC SIG Explore/Exchange Grants](#) [Attachments](#) [Approvals](#) [Logs](#) [Errors](#)

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

<a href="#">Add New</a>	Investigator	Agency	Program	Total Requested Amount
No records to display.				

A pop-up window will open. Click on “**Agency**” (red arrow below).

**Sponsor Info**

[Save](#) [Close](#)

Complete all fields and click generate to add per fiscal year budget request for this funder.

**Sponsor Info.**

Agency: [Agency](#)

Program:

Investigator:

Competition Date:

Start Date:

End Date:

Currency Type:

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 fiscal year disbursement table.

[GENERATE](#)

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

Another window will open, and you can search for the funding agency you are applying to. For the SSHRC SIG program, you need to search for and select UNBC as the funder. Enter “UNBC” into the “**Abbreviation**” search field and click “**Search**” (red arrow below). Click “**Select**” next to the “University of Northern British Columbia” entry (green arrow below).

Agency Name:  ☐ Start With ☒ Any part

Abbreviation:  UNBC

Options	Name	Abbreviation	Source
<input type="button" value="Select"/>	UNBC/NH MOU	UNBC/NH MOU	Internal
<input type="button" value="Select"/>	University of Northern British Columbia	UNBC	Internal

Once you have selected UNBC as the funding agency, click on the drop-down list beside “**Program**” (red arrow below) and select “SSHRC Explore/Exchange Grant” as the program.

Complete all fields and click generate to add per fiscal year budget request for this funder.

**Sponsor Info.**

Agency: University of Northern British Columbia

Program:

Investigator:

Competition Date:

Start Date:

End Date:

Currency Type:

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 fiscal year disbursement table.

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

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

A new **funding disbursement table** will need to be generated. Click “**Generate**” (red arrow below) and a table with fiscal dates will be generated. In the “**Requested Cash**” box (red rectangle below), enter the amount you are requesting from the SSHRC SIG Explore or Exchange Grant.

Powered by Process Pathways

Welcome: Sharleen Balogh

**Sponsor Info**

Save Close

Complete all fields and click generate to add per fiscal year budget request for this funder.

**Sponsor Info.**

Agency: University of Northern British Columbia Agency

Program: SSHRC Explore/Exchange

Investigator: Ms. Sharleen Balogh (Principal Investigator)

Competition Date:

Start Date: 2023/06/15

End Date: 2024/03/31

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 fiscal year disbursement table.

GENERATE

Year	Start Date	End Date	Requested Cash	Requested In-Kind	Requested Overhead	Awarded Cash	Awarded In-Kind	Awarded Overhead
2024	2023/06/15	2024/03/31	0.00	0.00	0.00	0.00	0.00	0.00
			0.00	0.00	0.00	0.00	0.00	0.00

8. Proceed to the “SSHRC SIG Explore/Exchange Grants” tab. You will see a screen similar to the one below. Answer all of the applicable questions under the “**General Information**”, “**Certifications and Registrations**”, “**Administration**” and “**Declarations**” sub-tabs (see below). Questions with a red asterisk (\*) are mandatory, but please answer all questions relevant to your application.

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Welcome: Sharleen Balogh

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General Information Certifications and Registrations Administration Declarations

1.1) \* Please select the SSHRC SIG funding opportunity you wish to apply to.  
SSHRC Explore Grants providing funding to develop a research project or conduct pilot work and enable researchers to hire students at any level to participate in their research projects.  
SSHRC Exchange Grants support the organization of small-scale knowledge mobilization activities, such as workshops and seminars or allow researchers to attend or present their research at scholarly conferences and other dissemination venues.

☐ Explore  
☐ Exchange

1.2) \* Do you have other sources of funding that will be applied to this project?  
Please identify any other sources of funding that you have for this project.

☐ Yes  
☐ No

1.3) If you answered yes to question 1.2, please specify the funding agency and the amount.  
Please identify the source (agency) and amount of funding that you have received or will be receiving for this project.

9. Proceed to the “**Attachments**” tab. You will see a screen similar to the one below. Download the correct application form and the budget template by clicking on the links in the tab (red rectangle below). Complete the application documents and upload them by clicking on “**Add Attachment**” (red arrow below).

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Please attach the following supplementary documents (available below):

**Application form** (please ensure you download the correct form for your project)

**Budget template** (all budgets must be in Canadian dollars)

**Letter of Acceptance or Invitation** (for Conference Travel Support Requests only)

Please ensure you have uploaded all required documents prior to submitting your application.

Application Form - SSHRC SIG Explore.docx  
Application Form - SSHRC SIG Exchange - Conference Travel.docx  
Application Form - SSHRC SIG Exchange - Knowledge Mobilization Activities.docx  
Budget Template - SSHRC SIG Explore\_Exchange.xlsx

Add Attachment

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 (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, Letter of Acceptance, 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. Internal applications are automatically routed to the Office of Research and Innovation.

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#### 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"/>	



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.

SSHRC SIG Explore/Exchange Grants -> General Information:1.1 Please select the SSHRC SIG funding opportunity you wish to apply to. is required.

SSHRC SIG Explore/Exchange Grants -> General Information:1.2 Do you have other sources of funding that will be applied to this project? is required.

SSHRC SIG Explore/Exchange Grants -> General Information:1.4 Will you be training highly qualified personnel (HQP)? is required.

SSHRC SIG Explore/Exchange Grants -> Certifications and Registrations:2.1 Is research certification required? is required.

SSHRC SIG Explore/Exchange Grants -> Certifications and Registrations:2.9 Is field work hazards training required? is required.

SSHRC SIG Explore/Exchange Grants -> Administration:3.1 Location of research is required.

SSHRC SIG Explore/Exchange Grants -> Administration:3.2 Does this project have an international component? 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 to the Office of Research and Innovation. If at any time, further information is required, you will receive an email indicating this.

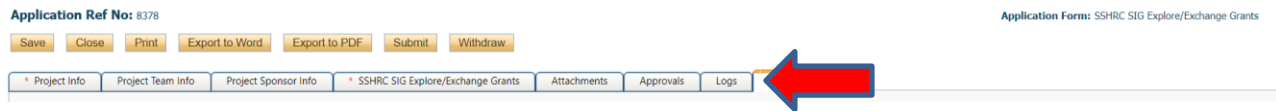
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14. At any time, you can view the status of your application either:

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



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

