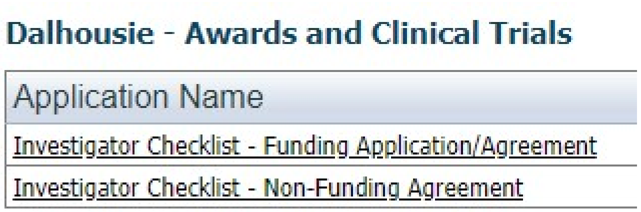
How to Submit an Application Form

Login to the portal through the appropriate link.

1. Internal User (Dalhousie NetID)
2. External User

On the right side of the homepage, click Apply New.

Under **Dalhousie – Awards and Clinical Trials**, select the relevant form.

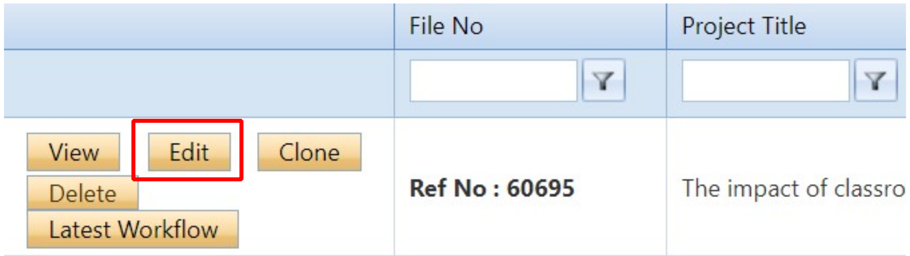


The form includes a series of tabs at the top. Some questions, marked by a red asterisk, are mandatory to answer prior to submission of the form. The **Errors** tab on the far right will disappear, once these questions have been answered.

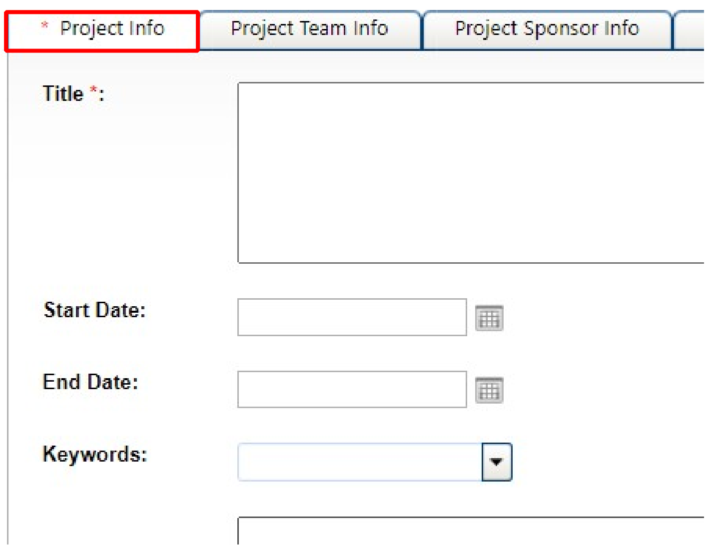
Orange buttons enable functional tasks like saving, printing, or submitting the file for review. The portal does not have auto-save feature, and it is recommended to click **Save** at regular intervals.

If you need to close the draft, click Save and then Close. This will take you back to the homepage. To open the draft again, click Applications: Drafts, which is found under the Principal Investigator or Project Team Member role block.

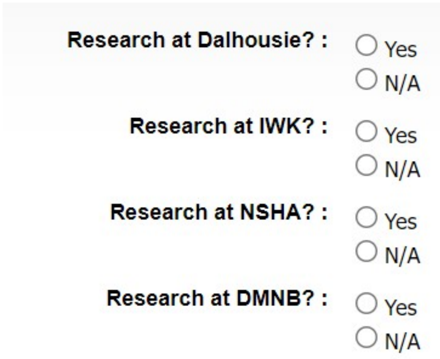
Locate the relevant file, and open with the **Edit** button. The View button is read-only mode and will not allow you to save changes.



Basic details are captured under the **Project Info** tab, including Project Title, Start and End Dates (these dates can be estimated if not finalized yet), and Keywords relevant to the project.



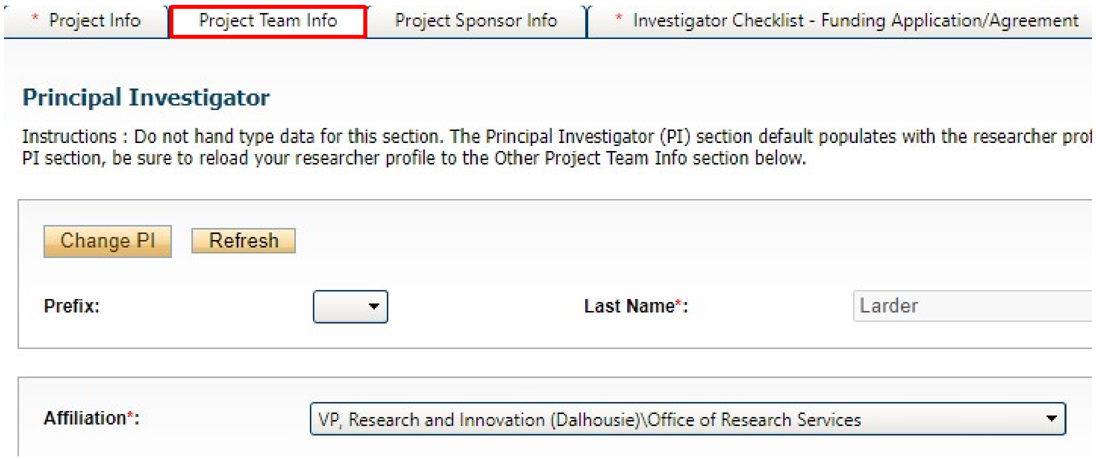
Farther down the page are a series of questions where a "yes" response can be given where applicable.



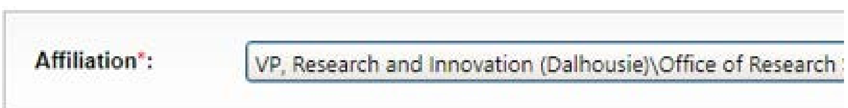
The PI can also link a Certificate file to the application. Clicking Search will generate a list of the PI's Human Ethics and Animal Ethics protocols in the system.

Investigator details are automatically populated under the **Project Team Info** tab. By default, whoever starts the application is listed as the Principal Investigator. If the person is not actually the PI, they can still complete the checklist, but the PI must be the one to click Submit, as the equivalent of their electronic signature. Click here for instructions on how to change the PI.

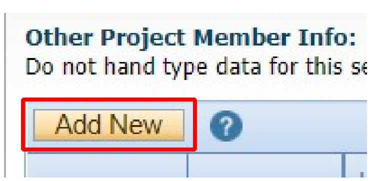
If the lead researcher is at another institution, the Dalhousie researcher must remain listed as the PI on the ROMEO file, because they are seeking department and/or faculty approval and will be the account holder if funds are coming to Dal. The lead researcher can be added as a team member (if they have a profile in Dal's ROMEO system) or their details can be added to the team member information box under the Project Info tab.



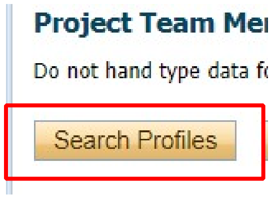
If the PI has multiple appointments, click the Affiliation drop-down box to select the unit to which the application should be routed for approval.



To add project team members, scroll to the bottom of the Project Team Info tab and click Add New.

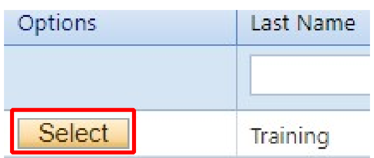


Click Search Profiles.

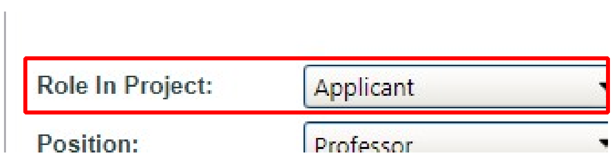


Search the name. If nothing appears, try the first or last name separately (name might include hyphens, initials, etc.)

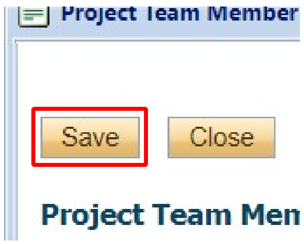
Click the Select button.



The team member’s profile details will auto-populate. The drop-down list can be used to select their role in the project.



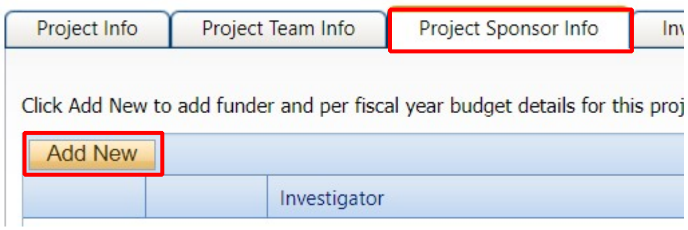
Click the Save button.



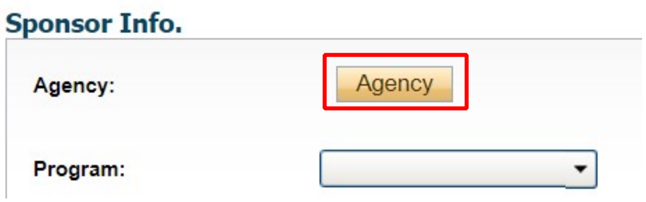
Tip: Most of the existing profiles will be Dalhousie affiliates. If the PI wishes to add someone who is not on the list, two options are available. The team member could submit a [ROMEO registration request] OR the team member's details can be typed into the boxes under the Project Info tab. The second option is preferable if their names are being added for reference only, and it's not necessary for them to have access to the file in ROMEO.

Funding or collaborating agency details can be captured under the **Project Sponsor Info** tab.

Click Add New.

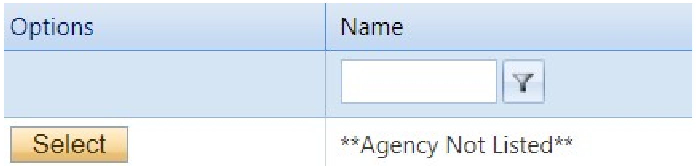


Click Agency.

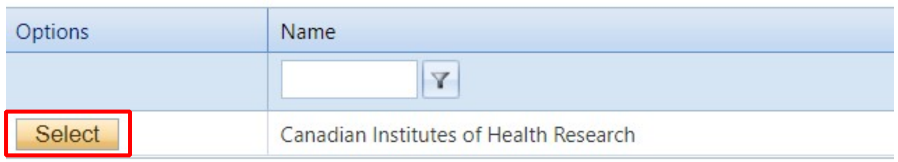


Search for Agency (name or abbreviation).

Note: If the agency is not listed, select the Agency Not Listed option. Type the agency name in the comment box provided.



If the agency appears, click the Select button.



Select the program from the drop-down list. Names are arranged in alphabetical order.

If applicable, enter the Competition Date (funder deadline). The Start and End Dates can be estimated or finalized.

Competition Date: 2025/08/01

Start Date: 2026/04/01

End Date: 2028/03/31

After entering the Start and End Dates, click Generate to produce the funding table, if applicable.

GENERATE

If funds are being requested, type the amounts in the white boxes. If the project is awarded, leave a note in the comment box because the Awarded columns can only be accessed by Office of Research Services (ORS) administrators.

Please use Canadian currency only. If the funder is international, use the [XE Currency Converter] to convert the amount to CAD.

Unless instructed otherwise, the total amounts can be typed in the white boxes in the first row. Administrators will break out the disbursements later.

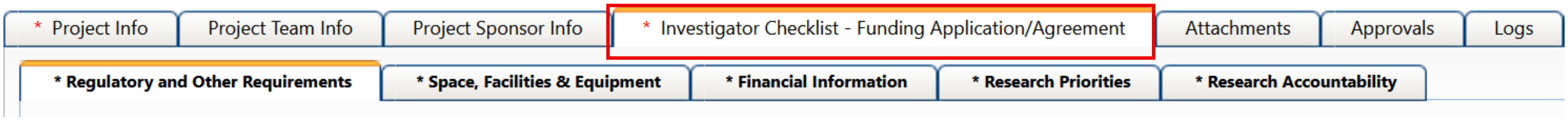
Year	Start Date	End Date	Requested Cash	Requested In-Kind	Requested Overhead
2024	2023/04/01	2024/03/31	50,000.00	0.00	0.00
2025	2024/04/01	2025/03/31	0.00	0.00	0.00

Click the Save button at the bottom or top of the page.

Save Close

Complete all fields and click ge

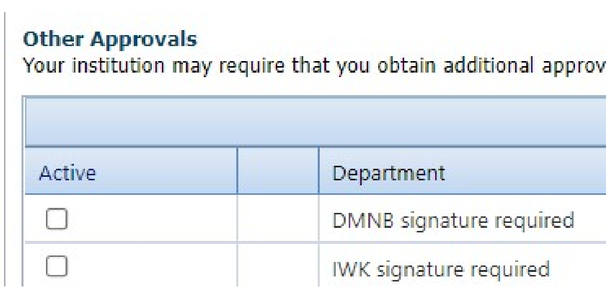
The next tab is the **Questionnaire** tab. The name of the tab will differ, depending on the form you selected. The tab will display several sub-tabs, from the left to the right.



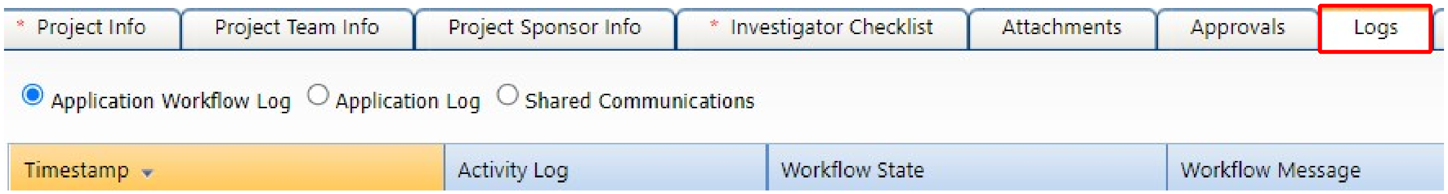
Upload relevant documentation to the **Attachments** tab.

The **Approvals** tab shows the pre-programmed workflow. Most applications are approved by the department first and then the faculty, before reaching ORS.

The bottom of the Approvals tab will display a list of signatories other than the department and faculty. The Questionnaire tab will provide guidance as to whether additional approvals are needed.

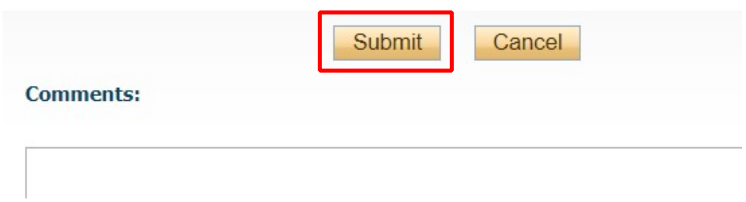


The **Logs** tab will automatically track changes to the file made overtime, as well as messages shared between signing authorities, researchers, and administrators.

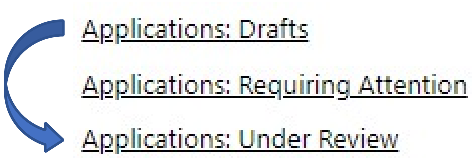


When the application is ready to submit, click the Submit button. **Note**: Only the Principal Investigator can see the Submit button, since it's the equivalent of their electronic signature.

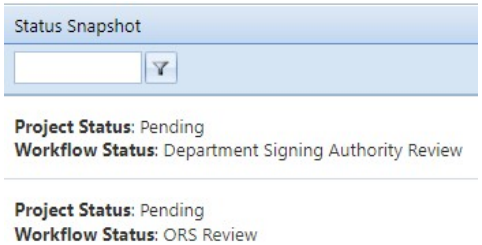
A pop-up box will appear. Add any comments to share with the signing authorities and/or office administrators, then click Submit again.



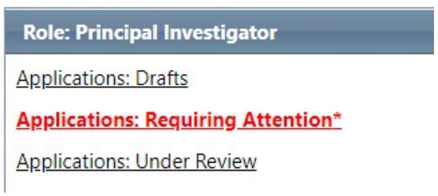
Upon submission, the file will move from **Applications: Drafts** to **Applications: Under Review**. At this point, no edits can be made, and the file will be read-only.



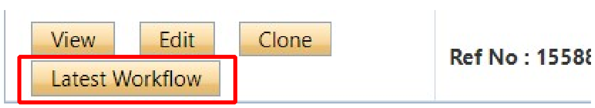
If the PI needs to make revisions, the Status Snapshot will display where the application is currently sitting. The signing authority or ORS administrator can return the application for revision.



If revisions are required, the PI and project team members will receive an automatic email notification. Login to the portal and click **Applications: Requiring Attention**.



Click Latest Workflow next to the project.



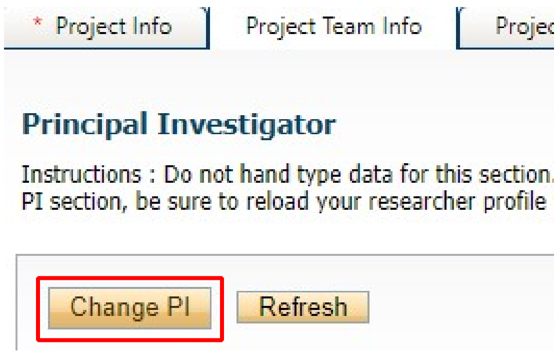
View the message from the signing authority or ORS administrator.

Make the required changes. As the final step, the PI clicks the Re-Submit button.

How to Change the Principal Investigator in a Draft File

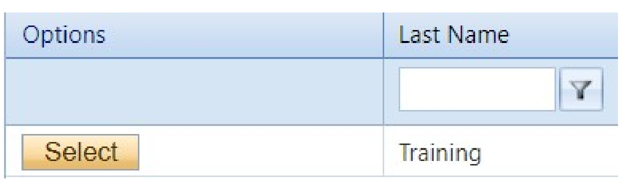
The person who starts the checklist is automatically listed as the PI by the system. If the Dalhousie Principal Investigator is somebody else, then refer to the steps outlined below.

At some point before completing the application, click the Change PI button.



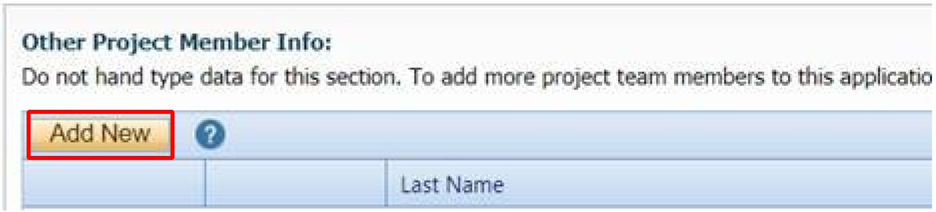
Search for the PI’s name in the white boxes. If nothing appears, try the first or last name separately (name might include hyphens, initials, etc.)

Select the PI’s name.



To save their work, and still have access to the file, the person who started the application needs to add themselves back in as a Project Team Member (scroll to the bottom of the Project Team Info tab).

Click Add New.



Click Search Profiles to look up and select their name.

Save and close out of the file. When the application is ready to be submitted, the team member can inform the PI. The PI can open the draft application with the **Edit** button and click the **Submit** button.