Guidance for ROMEO: Grant and Operational approvals

The ROMEO Researcher Portal is an online research administration portal that will help streamline the research approvals and application processes. Specifically, through this portal, you will be able to apply for grant, operational and ethics approval for your research projects. In this document, we provide some guidance on grant approvals.

To get started, go to the website:

https://fraserhealth.researchservicesoffice.com/Romeo.Researcher.Admin/

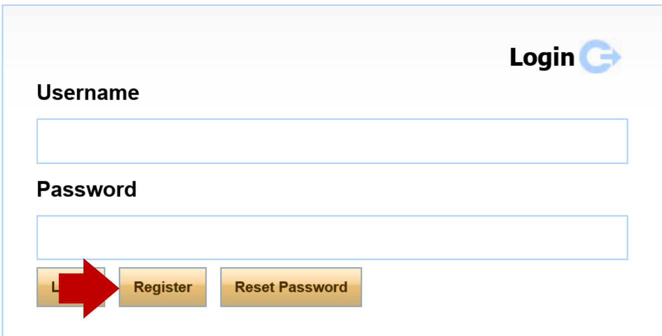
1. BASIC OPERATIONS

2. FUNDING APPROVALS

3. OTHER OPERATIONAL APPROVALS

1.1. Logging in for the first time (New researcher)

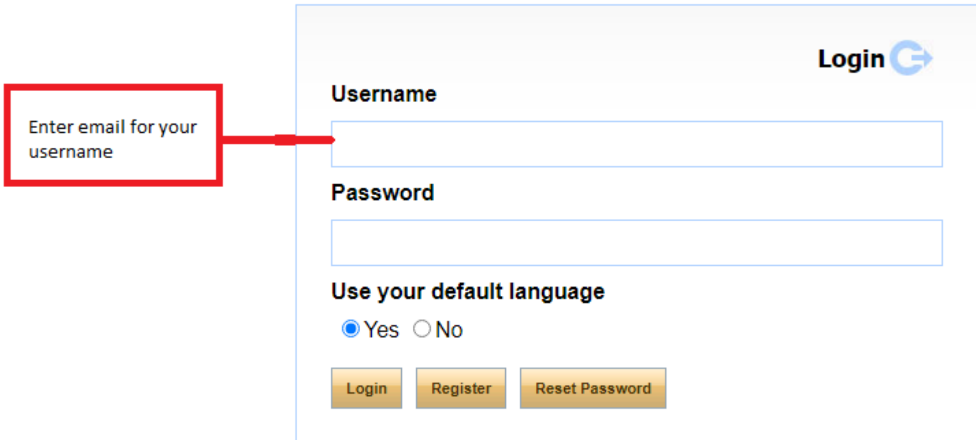
If you are a first time user, you must click the ***Register*** button to create an account. Your username should be your primary email address. You are strongly encouraged to use your Fraser Health email, rather than a personal email account, to create your account.



Once you have registered, you will receive an automatic email with instructions on setting up your password.

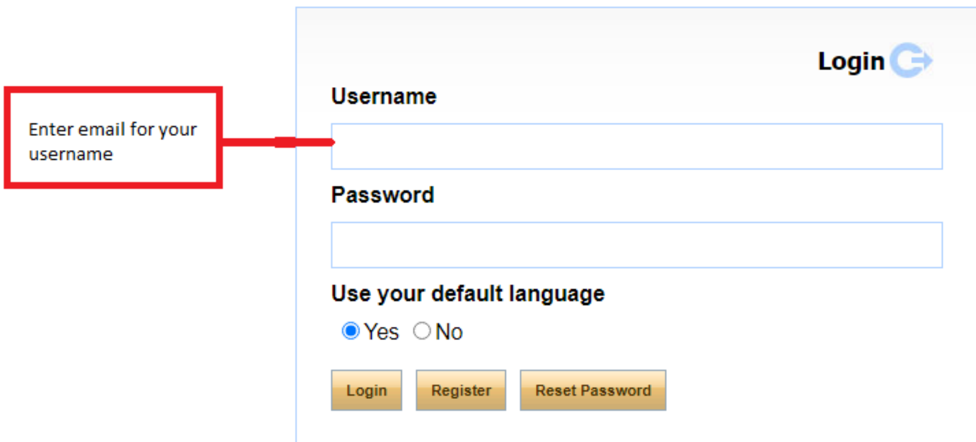
1.2. Logging in for the first time (Existing researcher)

If you have already been an investigator or main contract on a previous submission to the Fraser Health Research Ethics Board (FHREB), you will likely already be registered. You can insert your primary email address in the Username and select “Reset Password”. You will receive an automatic email with instructions on setting up your new password.



1.3. Resetting your password

If you have forgotten your password, you can reset your password on the main page. You can insert your primary email address in the Username and select “Reset Password”. You can insert your primary email address in the Username and select “Reset Password”. You will receive an automatic email with instructions on setting up your new password.



1.4. Initiating a Project Record

The first step for any research project on ROMEO is to initiate a project record. The purpose of this record is to inform the Department of Evaluation and Research Services (DERS) of the services that you'll require for your research project. This form also serves as the starting point of applying for a letter of authorization to conduct research.

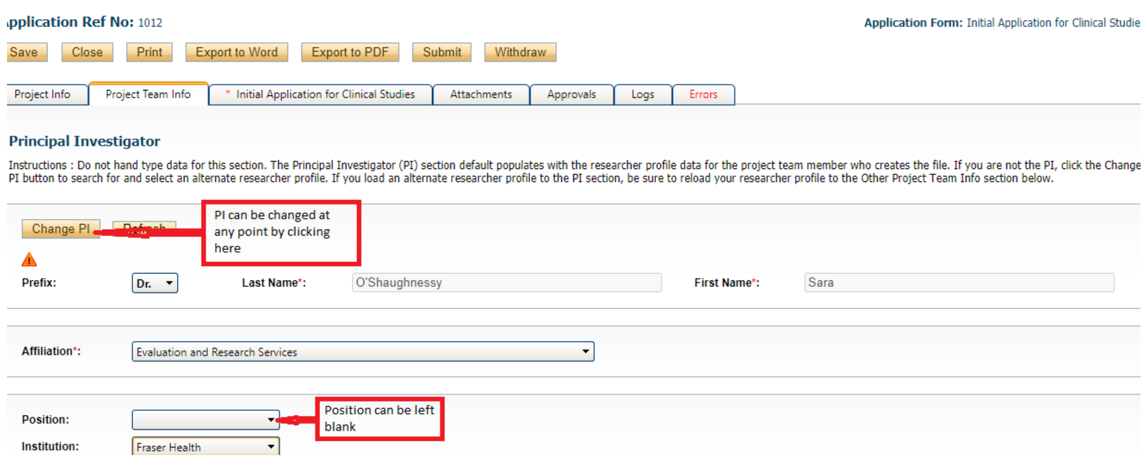
This initial form must be completed to get access to: Affiliation Agreement Request, CTMS intake, Contracts intake, Cost Centre Request, Data Access Agreement, Department Agreement to Provide Research Related Services, and FH Approval for External Grant Application form

To initiate a project record, you need to complete the ***Application to Initiate a Project Record.*** To do so, complete the following steps:

1. Log-in to the ROMEO Research Portal.
2. Select "Apply New"
3. Select "Application to Initiate a Project Record"
    a. Once you select the appropriate application form, you will be assigned a temporary Application Reference Number will the application is in draft format. This will be replaced with a permanent File Number once the application form is submitted. Please note the File Number will be different from the File Number associated with the FHREB application (if applicable).

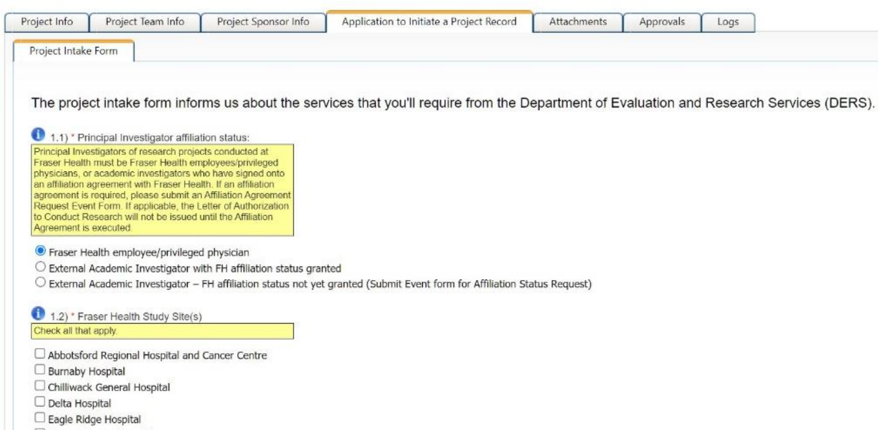
4. Complete the Project Info Tab
    a. Enter the Study Title, Start & End dates, and Keywords
    b. The “Related Certifications” section of this tab allows you to connect the operational and institutional approvals with the REB applications in the ROMEO Research Portal
    c. For studies with an existing REB application on ROMEO, select “Search”. This will generate a list of your existing REB applications. Select the appropriate study.
    d. For studies that have not yet applied for REB review on ROMEO, select “Add New”. This will generate an open text box in which you can indicate you have not yet submitted for REB review.
    e. For multi-jurisdictional studies that have applied for harmonized REB review on the Provincial Research Ethics Platform hosted on the UBC RISe portal: Select “Add New”. This will generate an open text box in which you must indicate the H-number for the study.

5. Complete the Project Team Member Tab
    a. The principal Investigator's information will automatically populate with the information of the individual making the application.
    b. All identified project team members can contribute to an application form pre-submission, but only the PI can submit an application form. If the application form has been initiated by a team member or research coordinator, the role of Principal Investigator will automatically be populated with that individual's information. This can be switched at any time using the "Change PI" function. Do not manually type in the PI's name. Once this is complete, remember to re-add yourself to the application as a team member.
    c. Use the Add New button to find and team members to the submission. Use the Search Profiles button to find and select team members from the ROMEO portal database. Once the Team Member's profile is located, select the appropriate role in the project from the drop-down list.
    d. For this section, it is not required to include all team members on the study, only those you wish to grant online access to (e.g. those who have been designated to submit forms on behalf of the PI). If you cannot find this person in the database, please have them register an account.



6. Project Sponsor Tab
    a. Insert information about the project sponsor or funder in this section, as applicable.
    b. Use the “Add New” button to add sponsors/funders to the project record. Locate the sponsors/funders by selecting “Agency”.
    c. Use the search function to locate the appropriate Agency name. If the sponsor/funder is not listed, contact Adriel.Orena@fraserhealth.ca to add the sponsor/funder.

7. Complete the Application to Initiate a Project Record tab.
    a. This section collects information about the nature of the project being submitted.



8. Submit the application form
    a. When you submit the application form, you will find the project record in “Applications: Under Review”. You will not be able to edit the form during this time. Wait until you receive an e-mail about the approval of this Project Record.
    b. If our administrator requires changes to your form, they will send the form back to you. You will find the returned form under “Applications: Requiring Attention”. Make the requested changes, and re-submit the application form.
    c. When our administrator has approved the initiation of the project record, you will find the project record in “Applications: Post-Review”.

1.5. Find the relevant project record under “Post-Review”

Once a project record has been created for your research project, our administrator will review the project record. When it has completed review, your project record will show up under “Applications: Post-Review”. On there, you will find a list of your research projects.

You can select “Events” on each of these project records to access the forms for further sub-approvals. The events page will provide a list of applications related to the various sub-approvals that may be required. Complete each form as necessary. Multiple forms may be submitted concurrently. If you are unsure which forms are required for your study, please contact Research.Approvals@fraserhealth.ca for guidance.

3.1. Requesting to obtain FH approval for External Grant Application

All external research grant applications are required to be reviewed and approved by our executive team prior to submission to the funder. To obtain prompt FH approval, the research development specialist must be notified of any outgoing external grant application **one week prior** to the competition deadline. To notify the research development specialist of your external grant application, please go through the following steps:

1) Log-in to the ROMEO Research Portal.
2) Find the relevant project record under “Post-Review”.
   - If your project does not have a project record, initiate a Project Record.
3) Under “Events”, find the ***FH Approval for External Grant Application*** form. Complete and submit this form.
   - If our administrator requires changes to your form, they will send the form back to you. You will find the returned form under “Events: Requiring Attention”. Make the requested changes, and re-submit the application form.
4) The Research Development Specialist will contact you by e-mail to give you further details.
5) When the application has received VP approval, the status on the ***FH Approval for External Grant Application*** form on ROMEO will be changed to “Active”.

3.2. Requesting a cost centre

Please note that to create a cost centre, you will need: a notice of award from your funding agency, as well as a letter of authorization to conduct research from FH.

1) Log-in to the ROMEO Research Portal.
2) Find the relevant project record under “Post-Review”.
    a. If your project does not have a project record, initiate a Project Record.
3) Under “Events”, find the ***Cost Centre Request*** form. Complete and submit this form.
    a. If our administrator requires changes to your form, they will send the form back to you. You will find the returned form under “Events: Requiring Attention”. Make the requested changes, and re-submit the application form.
4) When your Cost Centre has been created, you will receive an e-mail from Finance about the details of your Cost Centre. The status on the ***Cost Centre Request*** form on ROMEO will be changed to “Active”. Please allow 2-3 weeks for processing.

4.1. Requesting to add your project to Fraser Health's CTMS (Clinical Trial Management System)

1) Log-in to the ROMEO Research Portal.
2) Find the relevant project record under "Post-Review".
    - If your project does not have a project record, initiate a Project Record.
3) Under "Events", find the ***CTMS Intake*** form. Complete and submit this form.
    - If the CTMS Coordinator requires changes to your form, they will send the form back to you. You will find the returned form under "Events: Requiring Attention". Make the requested changes, and re-submit the application form.
4) The CTMS Coordinator process the request.
    - If your site already has an existing CTMS in place, the CTMS Coordinator will add the study and create the study template in the CTMS. They will then contact you by e-mail to provide details.
    - If your site does not have a CTMS in place, the CTMS Coordinator will contact you by e-mail to create a new CTMS for your site.
5) Once the CTMS has been added and the study template has been created in the CTMS, the status on the ***CTMS Intake*** form on ROMEO will be changed to "Active".

4.2. Requesting to execute a contract that involves Fraser Health

1) Log-in to the ROMEO Research Portal.
2) Find the relevant project record under "Post-Review".
   - If your project does not have a project record, initiate a Project Record.
3) Under "Events", find the ***Contracts Intake*** form. Complete and submit this form.
   - If our administrator requires changes to your form, they will send the form back to you. You will find the returned form under "Events: Requiring Attention". Make the requested changes, and re-submit the application form.
4) The Research Contracts Coordinator will contact you by e-mail to give you further details.
5) When the Contract has been executed, the status on the ***Contracts Intake*** form on ROMEO will be changed to "Active".

4.3. Requesting to amend a contract that involves Fraser Health

1) Log-in to the ROMEO Research Portal.
2) Find the relevant project record under "Post-Review".
   - If your project does not have a project record, initiate a Project Record.
3) Under "Events", find the ***Contracts Amendment*** form. Complete and submit this form.
   - If our administrator requires changes to your form, they will send the form back to you. You will find the returned form under "Events: Requiring Attention". Make the requested changes, and re-submit the application form.
4) The Research Contracts Coordinator will contact you by e-mail to give you further details.
5) When the Contract has been executed, the status on the ***Contracts Amendment*** form on ROMEO will be changed to "Active".