Applying for Research Option or Scholarly Activity (ROSA 🌹) Releases in ROMEO

Wherefore art thou Romeo?

UFV Romeo is an online research administration tool that allows researchers and research administrators to work collaboratively to manage internal and external grant applications throughout the research project life cycle.

All ROSA applications will be completed through the ROMEO portal. The information and questions are set up within ROMEO and can be accessed through the appropriate application form (as will be explained further in this tutorial).

Supported browsers for ROMEO are Google Chrome 76+, Firefox Quantum 68+, Microsoft Edge 44+.

Some benefits of ROMEO:

➢ Central database for all ongoing research projects, ethics protocols and funding agreements accessible to both researchers and research administrators.

➢ Ability to set up reminders for important milestones such as reports due or contract renewals required.

➢ Ability to attach ethics protocols and research projects/grants.

➢ Collaborate on applications with your research team and administrators.

➢ Notify the research office of grant applications that you plan to submit such as tri-council grants.

How to sign in to ROMEO:

Click on the ROMEO link found on the research website at www.ufv.ca/research**, or** https://ufv.researchservicesoffice.com/Romeo.Researcher/(S(ib1letn0fyyc4m45ik3mam55))/Login.aspx?ReturnUrl=%2fROMEO.Researcher%2f**. The link will bring you to the following screen:**

Select "Reset Password". The system will not allow you to create another account with the same email and it will let you know. Do not create another account with a different email.

An email will be sent to you to reset your password for you to gain access. It should not go into junk mail. Your information has already been entered into the system. If you do not receive a password reset request, your email is not in the system – please follow the steps in the section below or ask Kelly Tracey or Yvette Fairweather for help. Do not create a duplicate account by clicking "register" and using a different email.

When you have reset your password and signed in to ROMEO, this screen will appear:
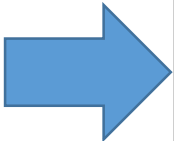

Click on the "Apply New" link above.

A list of all the application forms will appear including Ethics forms. Click on the appropriate form; either Research Option, Scholarly Activity, or Scholarly Activity Grant.

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New Application Forms

Office of Research Ethics

Application Name	Description	Status
HREB Request for Ethical Review	Form for faculty or students to fill out to request ethical approval of their research.	Open
HREB Request for Course Designation	For all courses with research projects or studies involving human participants.	Open
HREB Application for Externally Approved Research	To apply for ethics approval from UFV when you have already received approval from a research ethics board at another institution.	Open
HREB Request for Ethical Review -V1	Form for faculty or students to fill out to request ethical approval of their research.	Open

Office of Research Services

Application Name	Description	Status
Initial Funding Request Application	Initial form faculty complete who wish to apply for a funding award or grant	Open
Research Option	Research Option Application form.	Open
Sabbatical Application Form	Sabbatical application form	Open
Scholarly Activity	Scholarly Activity Application form.	Open
Scholarly Activity Grant Application	Scholarly Activity Grant Application form.	Open
Student Presentation Grant	Student request for support to present research at a conference.	Open

The main page of the forms will look like this with the middle tab listing the type of application you are applying for eg. Research Option:

Application Ref No: 1150

Application Form: Research Option

Save | Close | Print | Export to Word | Export to PDF | Submit | Withdraw

| * Project Info | Project Team Info | Project Sponsor Info | * Research Option | Attachments | Approvals | Logs | Errors |

Title *:

Start Date:

End Date:

Keywords: [dropdown]   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 commitee

Add New | Search

		Certification Category	File No	Status	Renewal Date	Notes

No records to display.

Click on the tabs along the top and complete each section as best you can making sure to press "SAVE" once you have completed each section.

Application Ref No: 1150

Application Form: Research Option

| Save | Close | Print | Export to Word | Export to PDF | Submit | Withdraw |

tabs

| * Project Info | Project Team Info | Project Sponsor Info | * Research Option | 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 commitee

| Add New | Search |

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

Project Info tab:

Complete the title, start date, end date and select keywords that apply to your project. If you have an ethics protocol related to this project, please click on the "search" button and follow the prompts to add the protocol. If you still need to apply for ethics, you do not need to do anything here but instead will declare it later in the application.

Application Ref No: 1150   **Application Form:** Research Option

| Save | Close | Print | Export to Word | Export to PDF | Submit | Withdraw |

| * Project Info | Project Team Info | Project Sponsor Info | * Research Option | 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 commitee

| Add New | Search |

| | Certification Category | | File No | Status | Renewal Date | Notes |

No records to display.

The following screen will appear after you click "search". If you have an existing protocol, it will appear as a file number and you can add it to your application.

Project Team Info tab:

Your name will automatically appear as the PI.

Project Sponsor Info tab:

Click on the "Add New" button to add a project sponsor eg. NSERC, BC Blueberry Council etc. This tab is not mandatory.

Project Sponsor Info tab con't:

This screen will appear if you click "Add New". You will then want to click the "Agency" button.

Project Sponsor Info tab con't:

After clicking the "Agency" button, the following screen will appear allowing you to choose the appropriate agency:

If you chose to use this section for a research option, scholarly activity or scholarly activity grant you would select "University of the Fraser Valley" as the agency.

The screen below will appear once you select the agency. You would then complete the fields available such as competition date, start date and end date. Then click "save" at the bottom.

Project Sponsor Info tab con't:

This is what the tab will look like if you choose a sponsor:

Powered by **Process Pathways**
Welcome: Charles Dickens

Application Ref No: 1323
Application Form: Research Option

| Save | Close | Print | Export to Word | Export to PDF | Submit | Withdraw |

| * Project Info | Project Team Info | Project Sponsor Info | * Research Option | 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
Edit	Delete	Dr. Charles Dickens (Principal Investigator)	National Sciences and Engineering Research Council of Canada	NSERC Discovery Grant	CAD : 0.00
					CAD : 0.00

Research Option tab:

This tab contains 6 tabs. The first tab is a link to the ROSA handbook which explains the application process and has tips to help you to be sure you include all the required information.

Application Ref No: 1323   **Application Form:** Research Option

| Save | Close | Print | Export to Word | Export to PDF | Submit | Withdraw |

| * Project Info | Project Team Info | Project Sponsor Info | * Research Option | Attachments | Approvals | Logs | Errors |

| ROSA Handbook | * Research Option 2020-2021, Part 1 | * Research Option Project Description, Part 2 | * Research Option Application, Part 3 | * Conflict of Interest Declaration | * Compliance and other information |

https://www.ufv.ca/media/assets/research/ro-sa-sabbatical/2018-2019-ROSA-HANDBOOK-May-15-final.pdf

Research Option tab:

The second tab is Part 1 of the application form. The red asterisk indicates an answer is mandatory.

Research Option tab:

The third tab is Part 2 of the application form:

Powered by **Process Pathways**   Welcome: Charles Dickens

Application Ref No: 1323   **Application Form:** Research Option

Save | Close | Print | Export to Word | Export to PDF | Submit | Withd

* Project Info | Project Team Info | Project Sponsor Info | * Research Option | Atta | Approvals | Logs | Errors

ROSA Handbook | * Research Option 2020-2021, Part 1 | * Research Option Project Description, Part 2 | * Research Option Application, Part 3 | * Conflict of Interest Declaration | * Compliance and other information

NOTE: THE DESCRIPTION SHOULD BE WRITTEN FOR A GENERAL ACADEMIC AUDIENCE

Please provide details of the research project on a separate attachment (maximum 4 pages to be attached) and include the following information (Please use the following as headings for the 9 areas to be addressed): (A research project that has multiple phases may be supported. The application should identify which phase of the project would be completed within the term of the release.)

3.1) * Give a brief description of the research project written in terms that a general academic reader will understand (max 250 words). Provide a clear and concise statement of the 1. Purpose, 2. Relevance and 3. Value of the project. NOTE: This statement will be entered into the searchable on-line database of research options and scholarly activities so that others can identify relevant and comparable projects.

3.2) * Objectives

Research Option tab:

The fourth tab is Part 3 of the application form:

Welcome: Charles Dickens

Application Ref No: 1323

Application Form: Research Option

| Save | Close | Print | Export to Word | Export to PDF | Submit | Withdraw |

| * Project Info | Project Team Info | Project Sponsor Info | * Research Option | Attachments | Approvals | Logs |

| ROSA Handbook | * Research Option 2020-2021, Part 1 | * Research Option Project Description, Part 2 | * Research Option Application, Part 3 | * Conflict of Interest Declaration | * Compliance and other information |

ⓘ 4.1) * Proposed outcomes, including: a) Significance of the research outcomes to the discipline or field in which the research is conducted (e.g. scientific, professional, artistic) and/or relevance or importance to the communities served by UFV; and b) Significance of the research as an innovative and/or entrepreneurial activity. (Principle #3)

ⓘ 4.2) * Likelihood of success of the proposed research as indicated by the applicant's previous research, preparation, experience and/or rigour of the research design and methodology.

ⓘ 4.3) * Relative importance of supporting the proposed research with a course release based on the consideration of any or all of the following factors: a) Provides a student(s) an opportunity to be significantly involved in research (e.g. research assistant or in class) (Principle #1)

Research Option tab:

The fifth tab contains the conflict of interest declaration. Under our agreement with the Tri-council funding agency, the University has to manage all potential and perceived conflicts of interest associated with funded research. By managing potential conflicts of interest, the university protects our researchers from allegations of wrongdoing, and the institution from possible damage to our reputation.

Research Option tab:

The sixth tab includes the compliance declaration and other information. Similar to the conflict of interest declaration, the compliance declaration ensures that all research being conducted at the university meets the compliance policies mandated by the tri-council funding agency.

Attachments tab:

Once you have completed all the required fields for the application form, you can attach your 2 page CV in the attachments tab. Simply click on the "Attachments" tab, and then click on the "Add Attachment" button to add your CV.
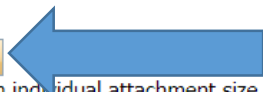
You can save and close your application at any point during the application. Your application draft will reside in the "Applications: Drafts" file under the "Role: Principal Investigator" drop down list until it has been submitted:

Please remember to **log out** of Romeo, do not simply close it. If you do not log out, you will be locked out and will need to contact the research office to unlock your files.

To open your draft application, click on the "Applications: Drafts" link and a page like this will appear with a list of all your applications. Click on the "edit" button of the application you wish to open and work on.

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	File No	Project Title	Principal Investigator	Application Type	Status Snapshot
	▽	▽	▽	All ▾	▽
View Edit Clone Delete Latest Workflow	Ref No : 1324		Dr. Charles Dickens (College of Arts - Humanities)	Research Option (Awards\Awards)	**Project Status**: Pending **Workflow Status**: Pre-Submission **Last Saved**: 2019/08/13
View Edit Clone Delete Latest Workflow	Ref No : 1185	Why is the sun hot?	Dr. Charles Dickens (College of Arts - Humanities)	Initial Funding Request Application (Awards\Awards)	**Project Status**: Pending **Workflow Status**: Pre-Submission **Last Saved**: 2019/08/12
View Unlock Latest Workflow Locked By Dickens(fairweathery_su)	Ref No : 1156		Dr. Charles Dickens (College of Arts - Humanities)	HREB Request for Ethical Review (Certification\Human Ethics)	**Project Status**: Pending **Workflow Status**: Pre-Submission **Last Saved**: 2019/06/06
View Edit Clone Delete Latest Workflow	Ref No : 1133	Why is Trump orange?	Dr. Charles Dickens (College of Arts - Humanities)	Research Option (Awards\Awards)	**Project Status**: Pending **Workflow Status**: Pre-Submission **Last Saved**: 2019/07/08

When you are ready to submit your application to the Research Office, press the "Submit" button.

Application Ref No: 1324   **Project Title:**
Project Work Flow State: Pre-Submission

Application Form: Research Option

| Save | Close | Print | Export to Word | Export to PDF | Submit | Withdraw |

| * Project Info | Project Team Info | Project Sponsor Info | * Research Option | 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 commitee

| Add New | Search |

	Certification Category	File No	Status	Renewal Date	Notes

If you have not completed all the mandatory fields in the application form the "errors" tab will appear red. Once you click on the "errors" tab, the fields that need to be completed will be listed:

Application Ref No: 1324 **Project Title:**   **Application Form:** Research Option
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 | * Research Option | Attachments | Approvals | Logs | Errors |

Project Info ->Project Title is required.

Research Option -> Research Option 2020-2021, Part 1:2.1 Semester release will be taken is required.

Research Option -> Research Option 2020-2021, Part 1:2.3 Has this project been supported in the past with a research option or a scholarly activity release? is required.

Research Option -> Research Option 2020-2021, Part 1:2.5 Please provide details of anticipated financial support streams while undertaking this project. These include but are not limited to grants, fees and honorariums. Do you anticipate any financial support while undertaking this project? is required.

Research Option -> Research Option 2020-2021, Part 1:2.7 The Research Office will advise your dean that your application has been received. The dean is not required to review your application. By submitting your application, you are required to acknowledge the following: is required.

Research Option -> Research Option 2020-2021, Part 1:2.8 If successfully funded, are you willing to have your application placed in a folder for future applicants to review? This is not a requirement; the Research Office has been asked to share applicant information. The Research Office cannot do this without the expressed consent of the applicant. is required.

Research Option -> Research Option 2020-2021, Part 1:2.9 Provide names of two referees with expertise in the field (may be UFV, national or international) with whom the adjudication and final review committees may consult. Please include their Name and position, Institution/Department, and email or phone number. is required.
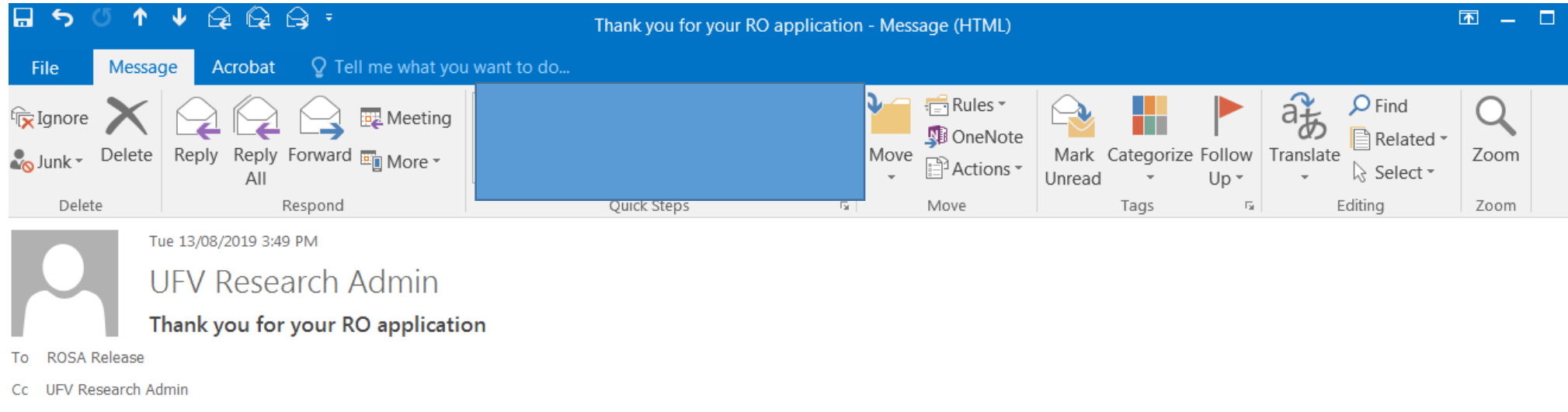
Research Option -> Research Option Project Description, Part 2:3.1 Give a brief description of the research project written in terms that a general academic reader will understand (max 250 words). Provide a clear and concise statement of the 1. Purpose, 2. Relevance and 3. Value of the project. NOTE: This statement will be entered into the searchable on-line database of research options and scholarly activities so that others can identify relevant and comparable projects. is required.

Research Option -> Research Option Project Description, Part 2:3.2 Objectives is required.

Once your application is complete and you click "Submit", the following window will appear. You must type something in the window before it will let you click "Submit" for the final time. You can treat this window like an email you would previously have attached your application to.

Application Ref No: 1185   Project Title: Why is the sun hot?   Application Form: Initial Funding Request A
Project Work Flow State: Pre-Submission

Save   Close   Print   Export to Word   Export to PDF   Submit   Withdraw

Project Info   Project Team Info   Project Sponsor Inf

Application Checklist   Conflict of Interest   Compli

Work Flow Action

Submit   Cancel

Comments:

Submit   Cancel

3.1) * Does the proposed research involve space require...   ...een reached with regard to space needs.

no

3.2) * Does the proposed research pose any health or sa...

no

3.3) * Does the proposed research involve human being...   ...g Humans and submit your proposal to the UFV Res...
Ethics Board via Romeo.
https://www.ufv.ca/research-ethics/

Yes
No

Once you submit your application you will receive an automatic email confirming receipt of your application by the Research Office.