

**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 funding 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 apply for funding in ROMEO

## Getting Started

When you are prepared to apply for a research grant or initiate a research contract, please notify the Research Office of your plans through the ROMEO research portal. Most grants require some type of institutional involvement such as signatures, and all will require the finance department and research office to assist in administering the funds.

To notify the research office through ROMEO, this screen will appear once you have logged in to ROMEO. Click on the “Apply New” link:

The screenshot displays the ROMEO research portal interface. At the top, there is a dark blue header with the text "Powered by Process Pathways | Product Info" on the left and "Welcome: Charles Dickens | Home | My Profile | Contact Us | Logout" on the right. Below this is a green banner with "OFFICE OF Research Services" on the left and the "UNIVERSITY OF THE FRASER VALLEY" logo on the right. Underneath the banner is a light blue navigation bar containing "BACK TO HOME | Search | File No: [dropdown] [input] [icon]" and "APPLY NEW | News | Useful Links |". A blue arrow points to the "APPLY NEW" link. Below the navigation bar is a dark blue sidebar with three menu items: "Role: Principal Investigator", "Role: Project Team Member", and "Role: Reviewer", each with a downward arrow.

# Internal Grants such as Research Option, Scholarly Activity, Sabbaticals and SSHRC Institutional Grants:

If you are applying to any of the internal grants available, follow the instructions below and click on the appropriate application form to begin the application process.

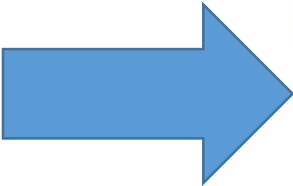


## New Application Forms

### Office of Research Ethics

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

### Office of Research Services

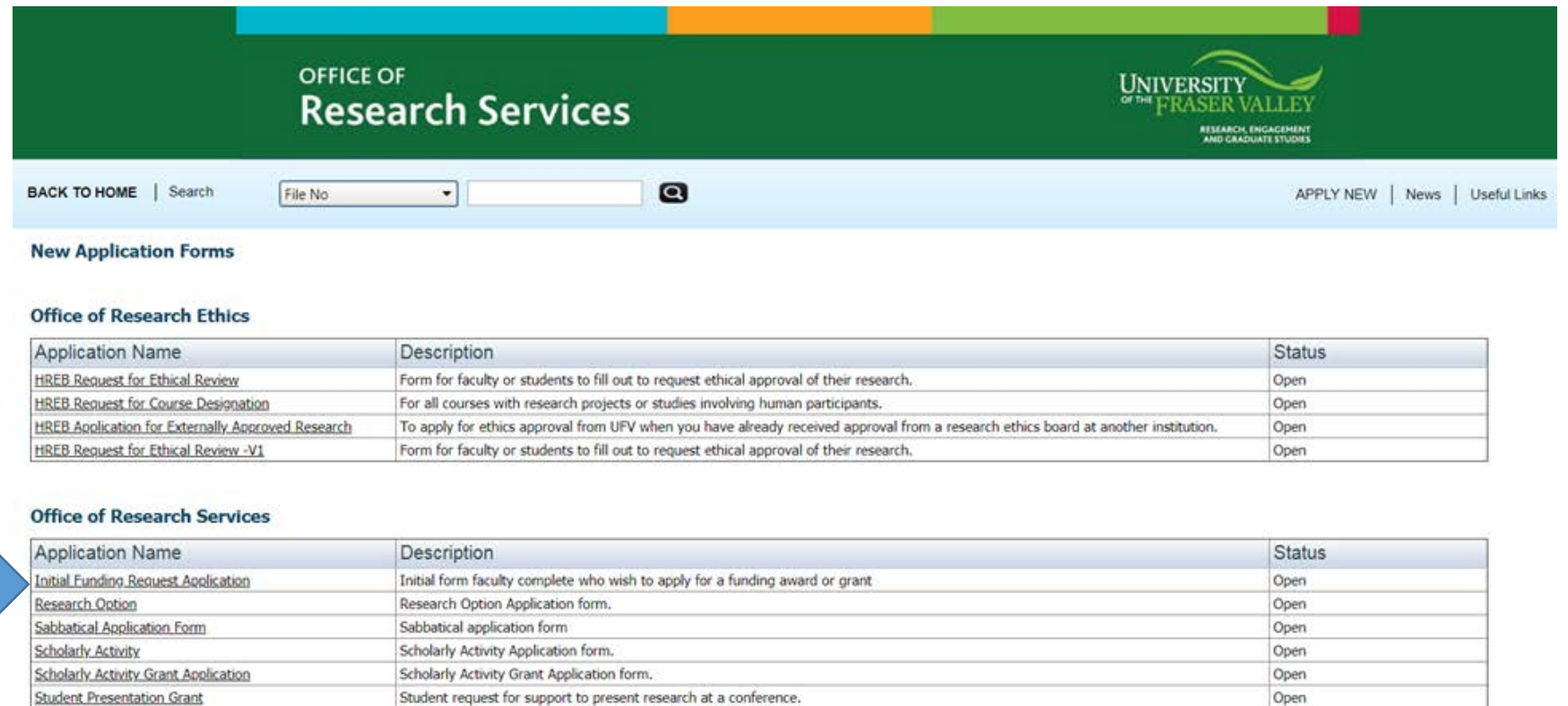


Application Name	Description	Status
<a href="#">Initial Funding Request Application</a>	Initial form faculty complete who wish to apply for a funding award or grant	Open
<a href="#">Research Option</a>	Research Option Application form.	Open
<a href="#">Sabbatical Application Form</a>	Sabbatical application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

# External Grants and Contracts:

To notify the University of the Fraser Valley (UFV) that you are applying for funding for a research project, you are required to complete the Initial Funding Request Form in ROMEO. This form must be completed for all research that involves any kind of funding and takes place under the umbrella of your work at UFV. The completion of this form will create a research file from which you can collaborate with research administrators, co-investigators and research assistants. You can share and review documents, apply for certifications, and arrange to receive notifications and reminders for reporting deadlines and certification renewals.

The Initial Funding Request Form is found on the same page as the internal funding applications forms:



The screenshot shows the website for the Office of Research Services at the University of the Fraser Valley. The header includes the university logo and the text "OFFICE OF Research Services". Below the header is a navigation bar with "BACK TO HOME", a search box, a "File No" dropdown menu, and a search icon. On the right side of the navigation bar are links for "APPLY NEW", "News", and "Useful Links".

The main content area is titled "New Application Forms" and is divided into two sections:

- Office of Research Ethics**: A table with 3 columns: Application Name, Description, and Status. It lists four forms: HREB Request for Ethical Review, HREB Request for Course Designation, HREB Application for Externally Approved Research, and HREB Request for Ethical Review -V1.
- Office of Research Services**: A table with 3 columns: Application Name, Description, and Status. It lists six forms: Initial Funding Request Application, Research Option, Sabbatical Application Form, Scholarly Activity, Scholarly Activity Grant Application, and Student Presentation Grant. A blue arrow points to the "Initial Funding Request Application" row.

Once you click on the “Initial Funding Request Form”, it will bring up a page with tabs along the top as seen below:

Application Ref No: 1149

Application Form: Initial Funding Request Application

Save Close Print Export to Word Export to PDF Submit Withdraw

Project Info Project Team Info Project Sponsor Info Initial Funding Request Application 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.				



Click on the tabs at the top and complete each section, **making sure to press “SAVE” after each section is complete.**

If you have an ethics or animal care certification associated with the funding application, click on the “add new” button in the “Related Certifications” sections at the bottom of the “Project Info” tab and follow the prompts to connect your certification to your funding application.

Application Ref No: 1149

Application Form: Initial Funding Request Application

Save Close Print Export to Word Export to PDF Submit Withdraw

Project Info Project Team Info Project Sponsor Info Initial Funding Request Application Attachments Approvals Logs Errors

Title:

Start Date:

End Date:

Keywords: Add Clear all

Related Certifications

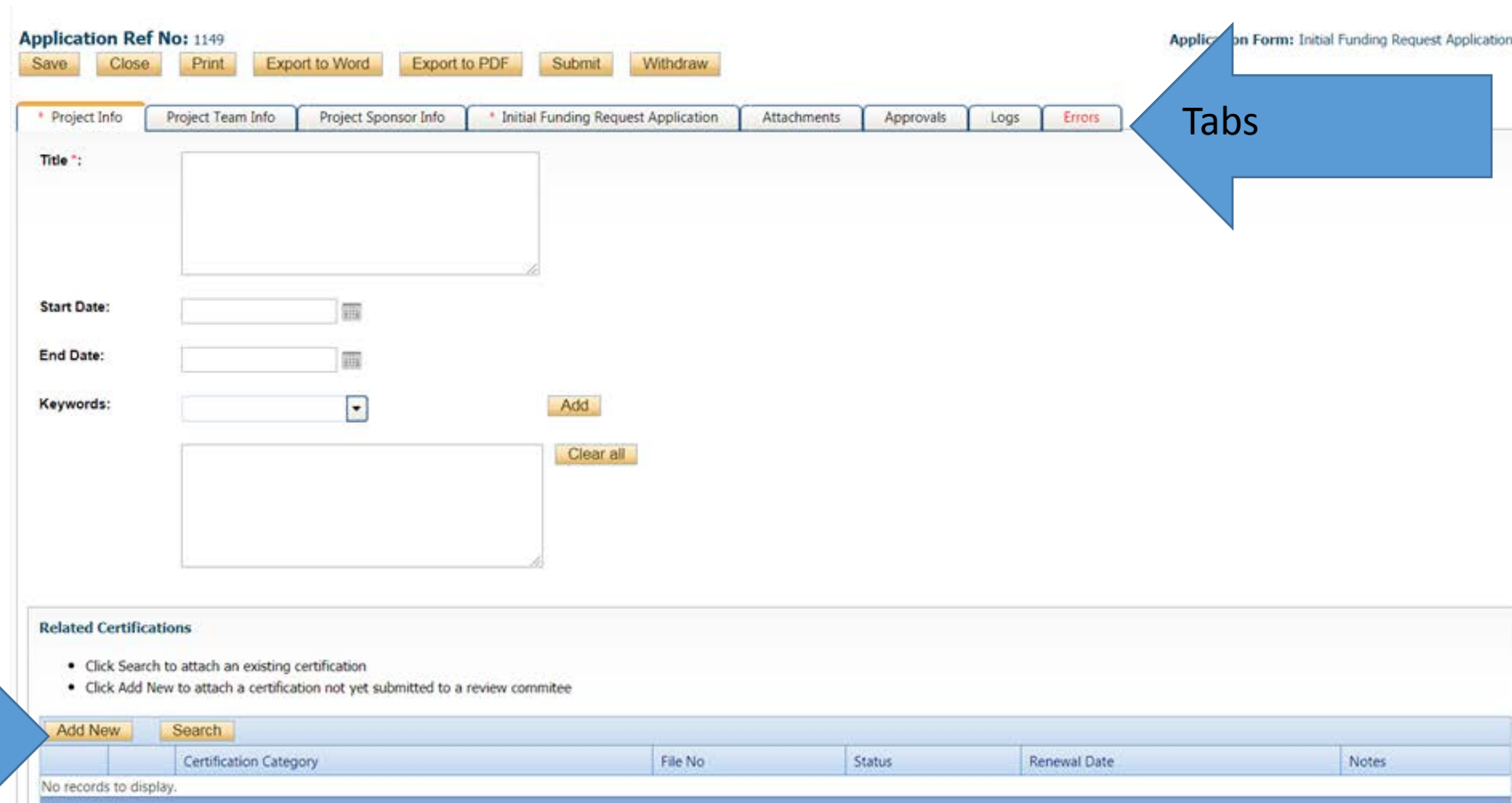
- Click Search to attach an existing certification
- Click Add New to attach a certification not yet submitted to a review committee

Add New Search

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

## Project Info tab:

If you have an ethics or animal care certification associated with the funding application, click on the “add new” button in the “Related Certifications” sections at the bottom of the “Project Info” tab and follow the prompts to connect your certification to your funding application.



Application Ref No: 1149

Application Form: Initial Funding Request Application

Save Close Print Export to Word Export to PDF Submit Withdraw

Project Info Project Team Info Project Sponsor Info Initial Funding Request Application 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.				

# Project Team Info tab:

Your name will automatically appear as the PI.

Application Ref No: 1405

Application Form: Initial Funding Request Application

Save Close Print Export to Word Export to PDF Submit Withdraw

\* Project Info Project Team Info Project Sponsor Info \* Initial Funding Request Application Attachments Approvals Logs Errors

## 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: Dr. Last Name\*: Dickens First Name\*: Charles

Affiliation\*: College of Arts - Humanities

Rank: Canada Research Chair

Institution: University of the Fraser V

Phone1: 12345679899

Email\*: rosa.release@ufv.ca

Primary Address: 101 Research Lane

Phone2:

Fax:

Alternate Address:

Preferred Address:  Primary Address  Alternate Address

Country: Canada



## 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.

Application Ref No: 1405

Application Form: Initial Funding Request Application

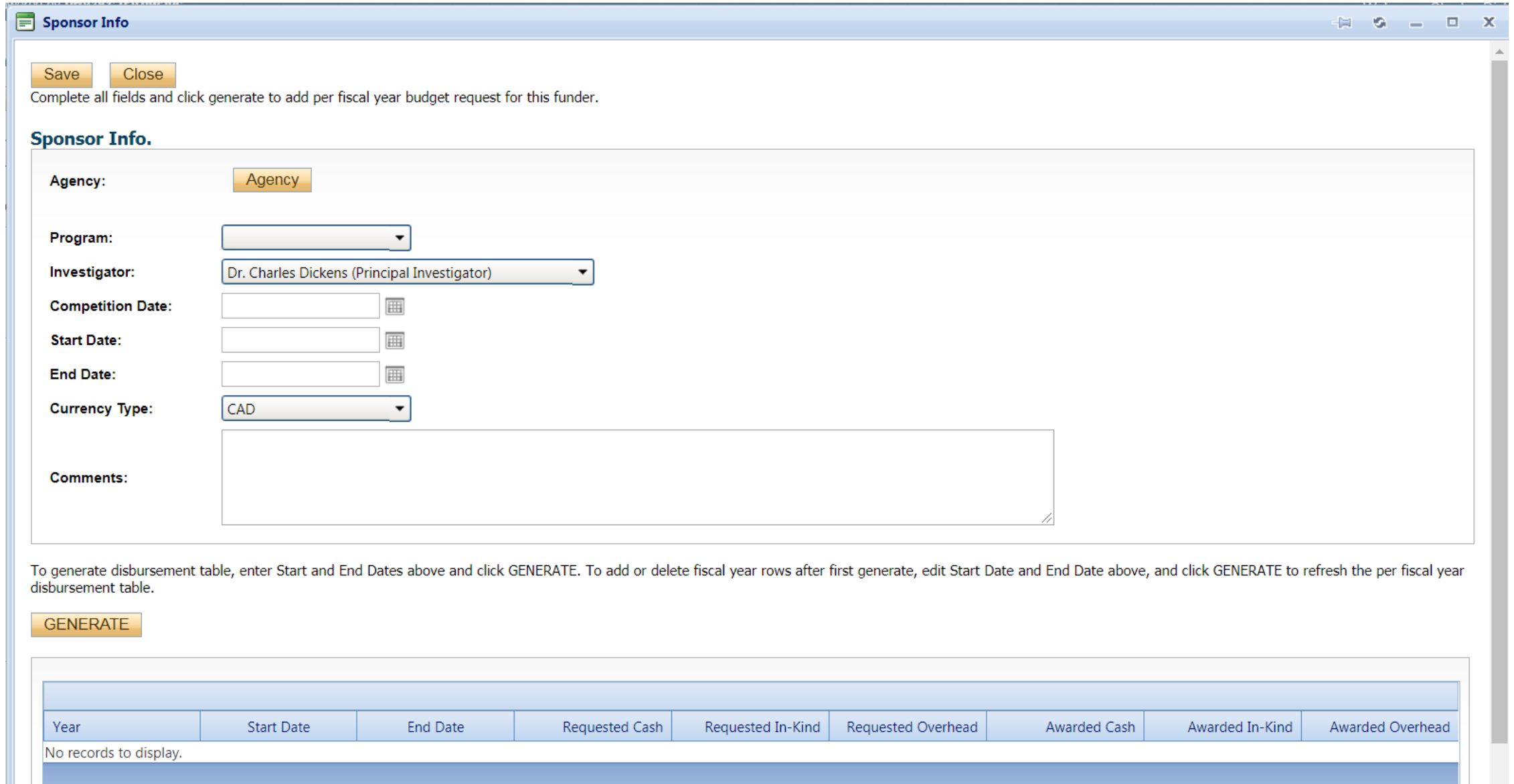
[Save](#) [Close](#) [Print](#) [Export to Word](#) [Export to PDF](#) [Submit](#) [Withdraw](#)

[\\* Project Info](#) [Project Team Info](#) [Project Sponsor Info](#) [\\* Initial Funding Request Application](#) [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.				

If you click “Add New”, the following screen will appear to be completed:



**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: Dr. Charles Dickens (Principal Investigator)

Competition Date:

Start Date:

End Date:

Currency Type: 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
No records to display.								

# Initial Funding Request Application tab:

This tab contains the application questions, the conflict of interest declaration, and the compliance declaration. All fields must be completed.

Application Ref No: 1405

Application Form: Initial Funding Request Application

Save Close Print Export to Word Export to PDF Submit Withdraw

\* Project Info Project Team Info Project Sponsor Info \* Initial Funding Request Application Attachments Approvals Logs Errors

\* Application Checklist \* Conflict of Interest \* Compliance and other information

Please respond to the following questions to the best of your knowledge. It is the researcher's responsibility to ensure that all research is completed in a manner that is consistent with the Tri-Council guidelines. Should a conflict or compliance issue arise after this form has been completed, please contact the Research Office so that the appropriate steps can be taken.

1.1) \* What is the Research Overhead % for this contract? If less than 25%, please attach the Research Overhead Waiver form.

1.2) \* Do you require additional space or renovation to existing space for this research? If yes, please complete a space request form found at <https://www.ufv.ca/campusplanning/space-planning/>

If the proposed research involves the need for space outside of what is currently available, you should discuss your needs with your Dean and determine whether those needs can be met before making a funding application.

1.3) \* ...

# Initial Funding Request Application tab con't:

The Conflict of Interest tab which must be completed.

Application Ref No: 1405

Application Form: Initial Funding Request Application

Save Close Print Export to Word Export to PDF Submit Withdraw

\* Project Info Project Team Info Project Sponsor Info \* Initial Funding Request Application Attachments Approvals Logs Errors

\* Application Checklist \* Conflict of Interest \* Compliance and other information

The University of the Fraser Valley must conduct its affairs in a manner that maintains the community's trust and confidence, advances the goals of the university and our researchers, and protects academic integrity. Completion of this declaration is essential in order to meet these goals and our commitments under the Tri-Council Memorandum of Understanding.

**i** 2.1) \* Will your university teaching, research, or administrative activities involve you in dealings with individuals, businesses, or corporations (including spin-off company or other corporations with which the reporting individual is associated) in ways that might be viewed by a reasonable observer as a conflict of interest?

**i** 2.2) \* Academic staff frequently participate in activities of service (voluntary) to the community and society at large. Will you be involved in service activities, outside of the University of the Fraser Valley, that may give rise to conflicts of interest? If "yes", please state the name of the outside parties with whom you are involved and the nature of your involvement (eg. a board member, advisor, director).

**i** 2.3) \* Will you or a member of your family or your corporation be the recipient(s) of financial interest or financial benefit from university funds over which you exercise influence? If "yes", state the particulars of the financial interest or benefit.

# Initial Funding Request Application tab con't:

Compliance and other information tab which must be completed.

Application Ref No: 1405

Application Form: Initial Funding Request Application

Save Close Print Export to Word Export to PDF Submit Withdraw

\* Project Info Project Team Info Project Sponsor Info \* Initial Funding Request Application Attachments Approvals Logs Errors

\* Application Checklist \* Conflict of Interest \* Compliance and other information

**i** 3.1) \* Does the proposed research involve space requirements in addition to what is currently available? If yes, please explain the need and any agreements that have been reached with regard to space needs.

**i** 3.2) \* Does the proposed research pose any health or safety concerns? If yes, what are the concerns?

**i** 3.3) \* Does the proposed research involve human beings as research participants? If yes, consult the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans and submit your proposal to the UFV Research Ethics Board via Romeo.

<https://www.ufv.ca/research-ethics/>

- Yes  
 No

**i** 3.4) \* Does the proposed research involve animals as research subjects? If yes, consult the Canadian Council on Animal Care policies on animal care and submit your proposal to the UFV Animal Care Committee via Romeo.

<https://www.ufv.ca/acc/>

## The Attachments tab:

This tab is where you can attach any documents you wish to be included with your application form. There are existing links to the UFV Conflict of Interest policy and the Academic Integrity at UFV policy.

Application Ref No: 1405

Application Form: Initial Funding Request Application

Save Close Print Export to Word Export to PDF Submit Withdraw

\* Project Info Project Team Info Project Sponsor Info \* Initial Funding Request Application Attachments Approvals Logs Errors

Conflict-of+Interest+(142).pdf  
Academic-Integrity-at-UFV-07.2017.pdf

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.

You can save and close your application at any point during the application process. Your application draft will reside in the “Applications: Drafts” file under the “Role: Principal Investigator” drop down list as shown below:

Powered by **Process Pathways** | Product Info Welcome: Charles Dickens | Home | My Profile | Contact Us | Logout


---

## OFFICE OF Research Services



UNIVERSITY  
OF THE FRASER VALLEY  
RESEARCH, ENGAGEMENT  
AND GRADUATE STUDIES

---

BACK TO HOME | Search   

APPLY NEW | News | Useful Links

---

**Role: Principal Investigator** ^

<a href="#">Applications: Drafts</a>	(4)
<a href="#">Applications: Requiring Attention</a>	(0)
<a href="#">Applications: Under Review</a>	(5)
<a href="#">Applications: Post-Review</a>	(0)
<a href="#">Applications: Withdrawn</a>	(0)
<a href="#">Events: Drafts</a>	(0)
<a href="#">Events: Requiring Attention</a>	(0)
<a href="#">Reminders</a>	(0)

**Role: Project Team Member** v


**Role: Reviewer** v

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 the draft application, click on the “Application: 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.

## OFFICE OF Research Services



UNIVERSITY  
OF THE FRASER VALLEY  
RESEARCH, ENGAGEMENT  
AND GRADUATE STUDIES

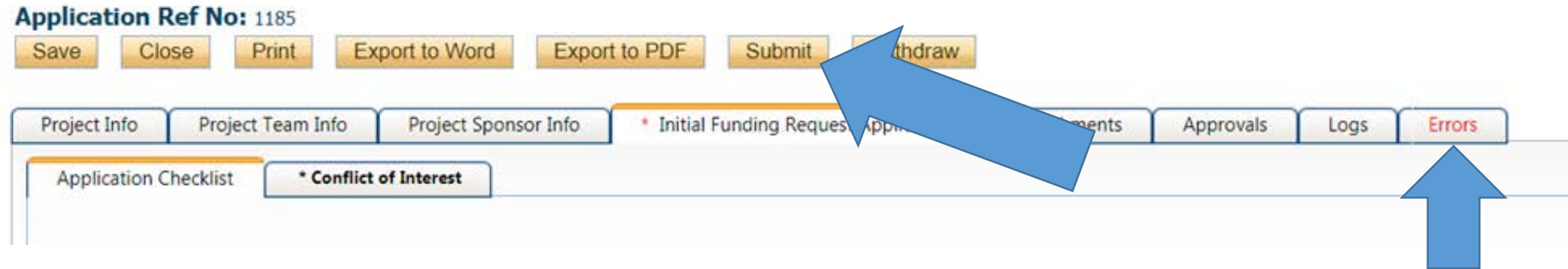
BACK TO HOME
APPLY NEW | News | Useful Links

Search🔍

Reset Filters
Export To Excel

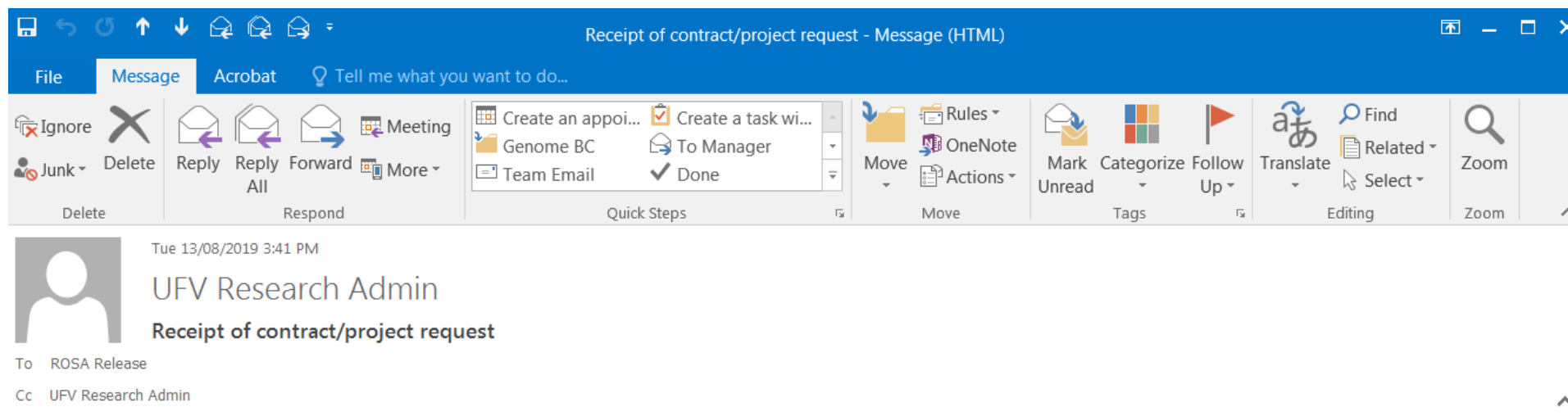
	File No	Project Title	Principal Investigator	Application Type	Status Snapshot
	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="All"/>	<input type="text" value=""/>
<div style="display: flex; justify-content: space-between; font-size: small;"> <span>View</span> <span>Edit</span> <span>Clone</span> </div> <div style="display: flex; justify-content: space-between; font-size: small;"> <span>Delete</span> <span>Latest Workflow</span> </div>	<b>Ref No : 1324</b>		Dr. Charles Dickens (College of Arts - Humanities)	Research Option (Awards\Awards)	<b>Project Status:</b> Pending <b>Workflow Status:</b> Pre-Submission <b>Last Saved:</b> 2019/08/13
<div style="display: flex; justify-content: space-between; font-size: small;"> <span>View</span> <span>Edit</span> <span>Clone</span> </div> <div style="display: flex; justify-content: space-between; font-size: small;"> <span>Delete</span> <span>Latest Workflow</span> </div>	<b>Ref No : 1185</b>	Why is the sun hot?	Dr. Charles Dickens (College of Arts - Humanities)	Initial Funding Request Application (Awards\Awards)	<b>Project Status:</b> Pending <b>Workflow Status:</b> Pre-Submission <b>Last Saved:</b> 2019/08/12
<div style="display: flex; justify-content: space-between; font-size: small;"> <span>View</span> <span>Unlock</span> </div> <div style="display: flex; justify-content: space-between; font-size: small;"> <span>Latest Workflow</span> </div> <p style="color: red; font-size: x-small; margin-top: 5px;">Locked By Dickens(fairweathery_su)</p>	<b>Ref No : 1156</b>		Dr. Charles Dickens (College of Arts - Humanities)	HREB Request for Ethical Review (Certification\Human Ethics)	<b>Project Status:</b> Pending <b>Workflow Status:</b> Pre-Submission <b>Last Saved:</b> 2019/06/06
<div style="display: flex; justify-content: space-between; font-size: small;"> <span>View</span> <span>Edit</span> <span>Clone</span> </div> <div style="display: flex; justify-content: space-between; font-size: small;"> <span>Delete</span> <span>Latest Workflow</span> </div>	<b>Ref No : 1133</b>	Why is Trump orange?	Dr. Charles Dickens (College of Arts - Humanities)	Research Option (Awards\Awards)	<b>Project Status:</b> Pending <b>Workflow Status:</b> Pre-Submission <b>Last Saved:</b> 2019/07/08

Once you have completed the application form, click the “submit” button found on the top of the page:



If you have not completed a mandatory field on the form and you click the “submit” button, the database will automatically inform you to check the “errors” tab to find out which fields you have not completed. You will notice that the “errors” tab is red on the image above which indicates that a mandatory field was not completed. You will not be able to submit the form until all mandatory fields are completed.

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



Dear Charles,

Thank you for completing the grants/contracts administration form. We will review your information and contact you once the review has been completed.

Thank you,

Kelly Tracey  
Grants and Contracts Officer  
604-851-6389