Romeo

How to Submit an External Grant/Contract Application Form

Please use this form to submit an external grant/contract application for a NEW project. If you are making changes to an existing project, such as applying for a change to the end date of your project or you have received new or additional funding for a project, please complete a Grant/Contract Amendment Form (Event Form).

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 research@unbc.ca.

Please also note: the process to apply for an external grant or to submit contract details is the same. The external grant application process will be used as an example in this document.

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) 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 research@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

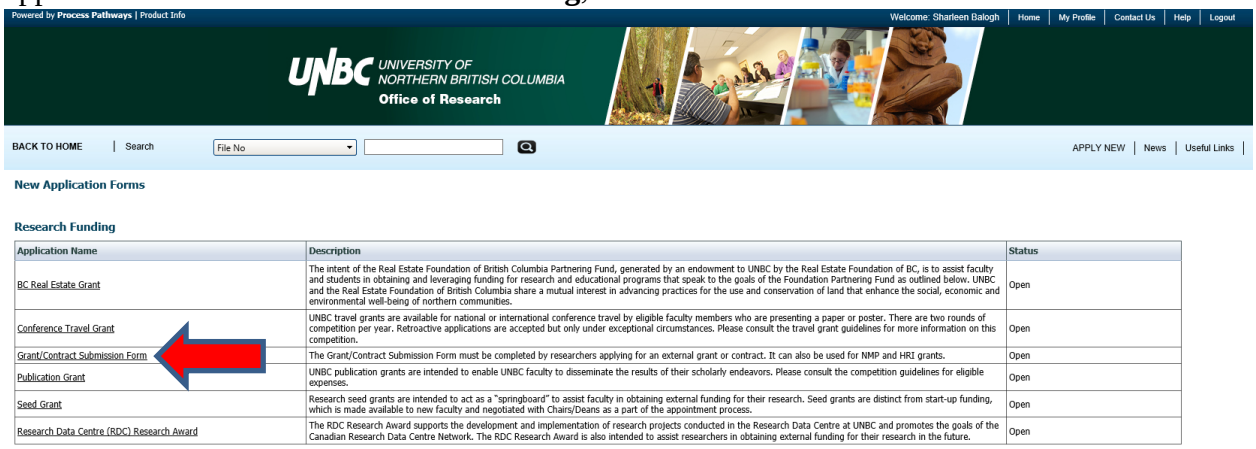
Access Denied – You are not authorized to access the Romeo Researcher Portal.

If you already have an account on Romeo, please contact researchportal@unbc.ca.

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 "**Grant/Contract Submission Form**".



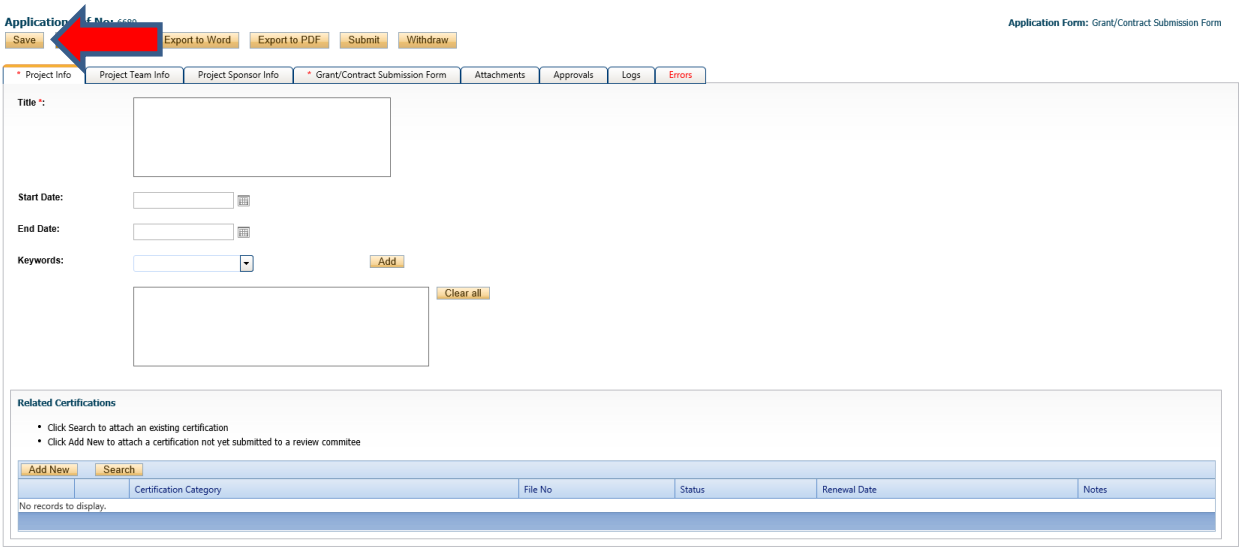
Application Name	Description	Status
BC Real Estate Grant	The intent of the Real Estate Foundation of British Columbia Partnering Fund, generated by an endowment to UNBC by the Real Estate Foundation of BC, is to assist faculty and students in obtaining and leveraging funding for research and educational 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
Conference Travel Grant	UNBC travel grants are available for national or international conference travel by eligible faculty members who are presenting a paper or poster. There are two rounds of competition per year. Retroactive applications are accepted but only under exceptional circumstances. Please consult the travel grant guidelines for more information on this competition.	Open
Grant/Contract Submission Form	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 HRI grants.	Open
Publication Grant	UNBC publication grants are intended to enable UNBC faculty to disseminate the results of their scholarly endeavors. Please consult the competition guidelines for eligible expenses.	Open
Seed Grant	Research seed grants are intended to act as a "springboard" to assist faculty in obtaining external funding for their research. Seed grants are distinct from start-up funding, which is made available to new faculty and negotiated with Chairs/Deans as a part of the appointment process.	Open
Research Data Centre (RDC) Research Award	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

4. You will be brought to a screen similar to the one below. Under the "**Project Info**" tab, complete:
Title: title of the project.

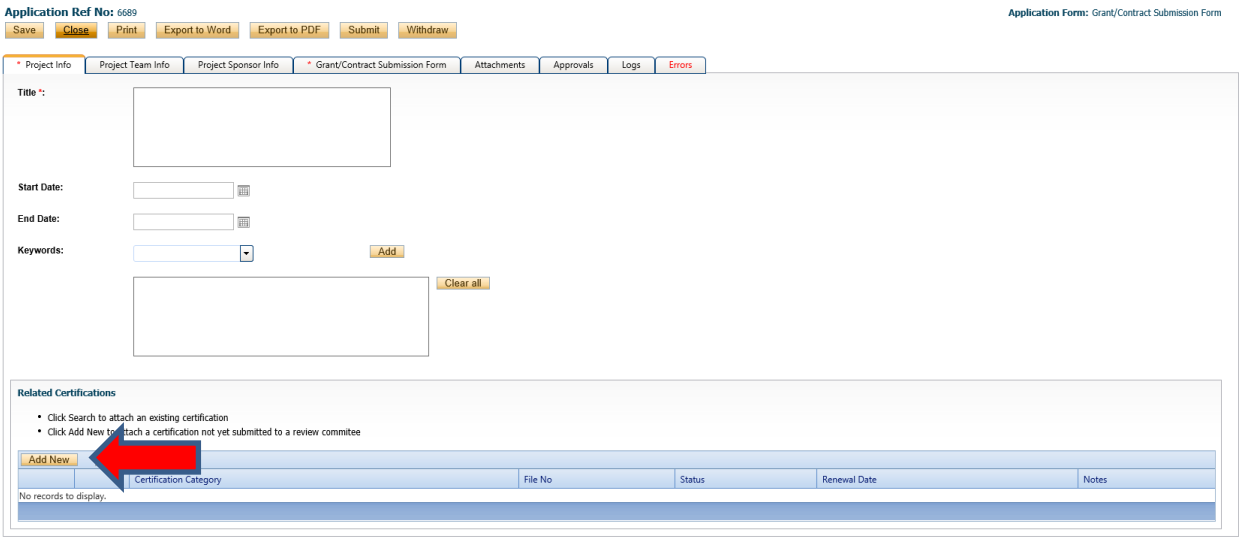
Start Date and **End Date:** enter the proposed project start/end dates.

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.

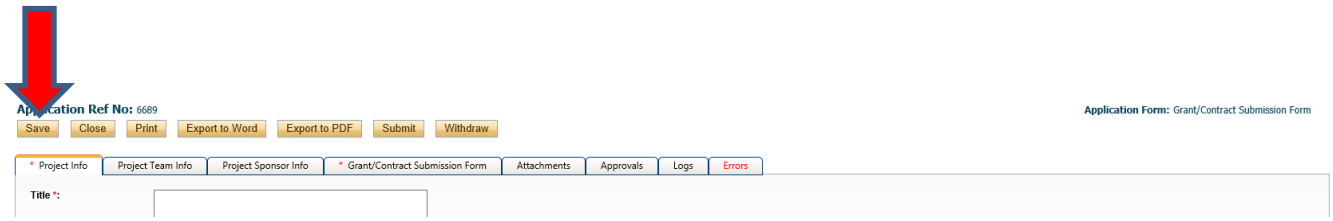


Related Certifications: If you require any certifications for this project (Animal Care, Human Ethics, Biohazard, Environmental Impact, or Radiation), click on "**Add New**" (see below).



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.



6. Proceed to the "**Project Team Info**" tab.

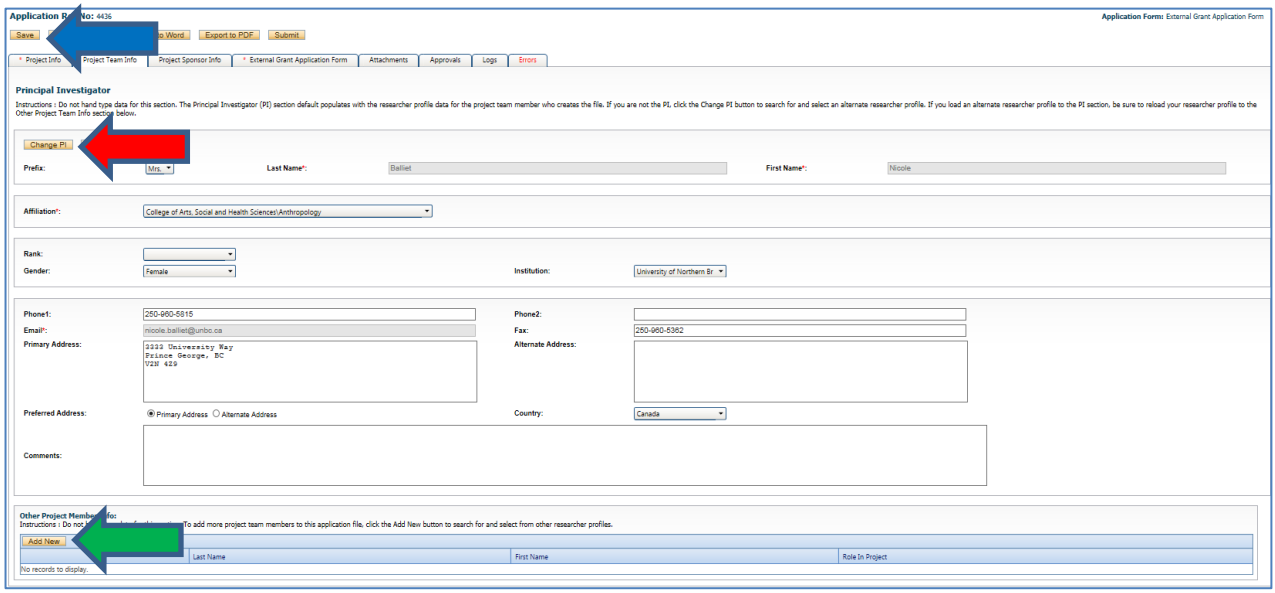
The Principal Investigator information will auto-populate with your profile information. Please contact the Office of Research and Innovation if your profile information is incorrect or out-of-date.

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. Therefore, if the PI is not from UNBC, please enter the contact information of the Project PI in the comments box of the PI tab, rather than formally changing the PI information. 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.

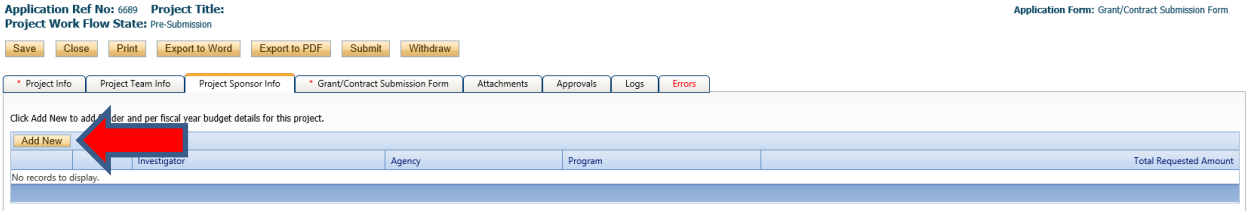
If there are other UNBC project team members, you will need to add them under "**Other Project Member Info**" (see below). To add project members, click on "**Add New**" (green arrow below). A pop-up window will open. Click "**Search Profiles**" to open another window to search for and select your team 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.

Please note: once added as a team member on an application, an individual will receive copies of internal emails that are generated as the application moves through the Romeo approval process. Therefore, please add the contact information for external co-applicants in the comments box of the PI tab, rather than formally adding them as team members.

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



7. Proceed to the "**Project Sponsor Info**" tab. This is the tab where you will indicate the agency to which you are applying, and the amount of money you are requesting. You will see a screen similar to the one below. Click "**Add New**".



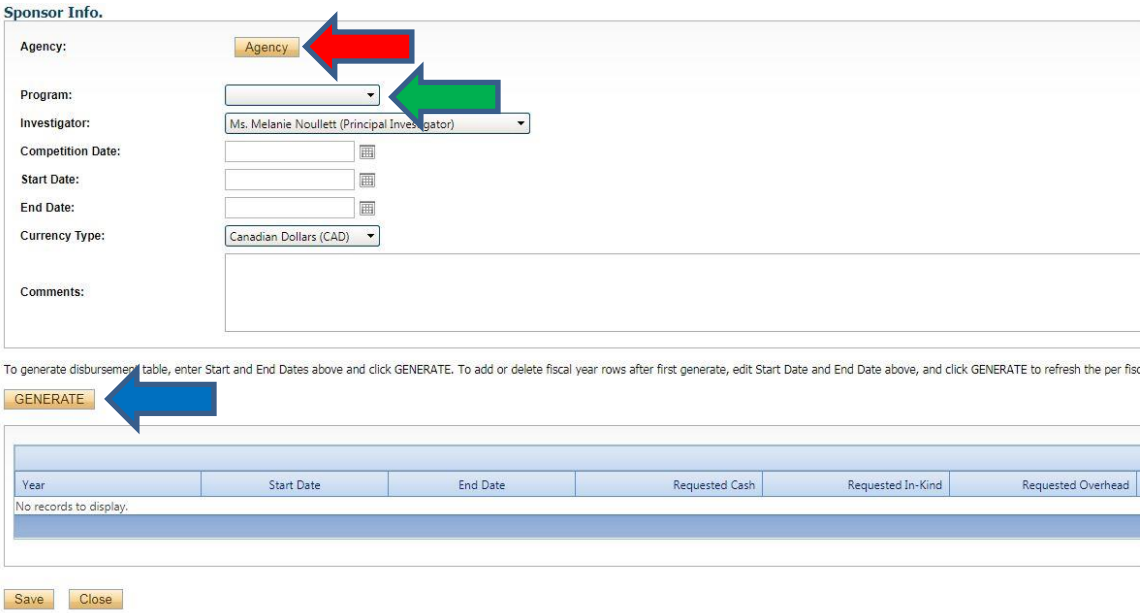
A pop-up window will open. Click on "**Agency**" (red arrow below). Another window will open, and you can search for the funding agency you are applying to. You may conduct a search using either the agency name or abbreviation (e.g. NSERC/SSHRC/CIHR). If the agency does not appear when searching using the abbreviation, please use the full name and search again. If the agency you are applying to is not in the list, please contact the Office of Research and Innovation with the details. Click on "**Select**" to choose the agency.

Once you have selected the funding agency, click on the drop-down list beside "**Program**" (green arrow below) and select the program to which you are applying (e.g. Discovery Grants, Insight Development Grants, etc.). If the program you are applying to is not in the list, please contact the Office of Research and Innovation with the details.

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

A new **funding disbursement** will need to be entered for each year of funding. Click "**Generate**" (blue arrow below) and a table with fiscal dates will be generated, where you can then add the

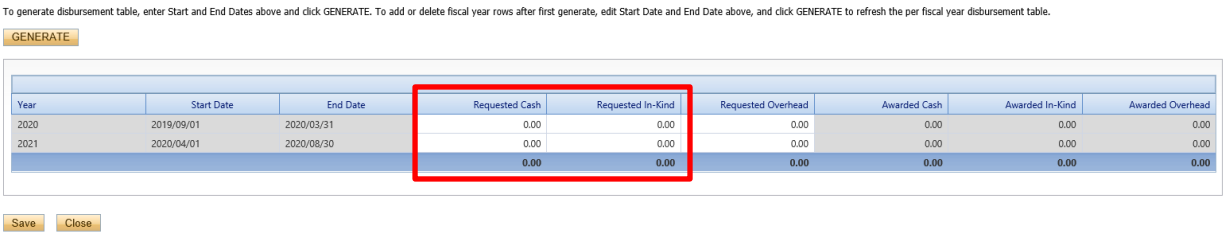
appropriate disbursements for each period.In the appropriate boxes (see below), enter the **requested cash** that will be coming to UNBC (rather than the overall grant requested, if you are a co-applicant on a grant application, for example). Funds should be entered in CAD (if funding is to be provided in another currency, please indicate the original currency in the comments section and include the original amount, exchange rate and date).



Enter **requested in-kind** (if any) from the *same* sponsor (you will need to add a new sponsor if the in-kind contribution(s) come from a separate sponsor(s)).
Please note: All in-kind contributions need back-up (e.g. letter of support, email, quotation, etc.) indicating the level of support.

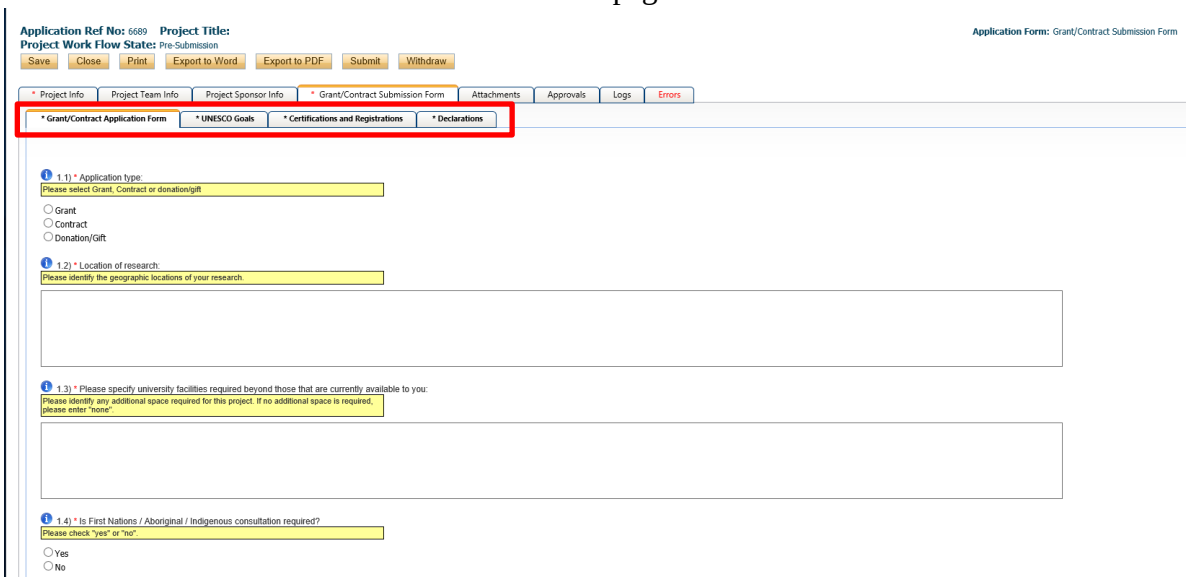
Leave the requested overhead field blank. Enter the percentage overhead requested in the comments box (UNBC's standard rate is 25% unless the funder has a different stated maximum). Remember to click "**Save**" before closing this page. Click on "**Save**" again to save the entire Sponsor Info. page.

NOTE: If there are multiple sponsors/partner organizations for your project, you will need to repeat the process described above (Step 7) for each sponsor/partner organization.

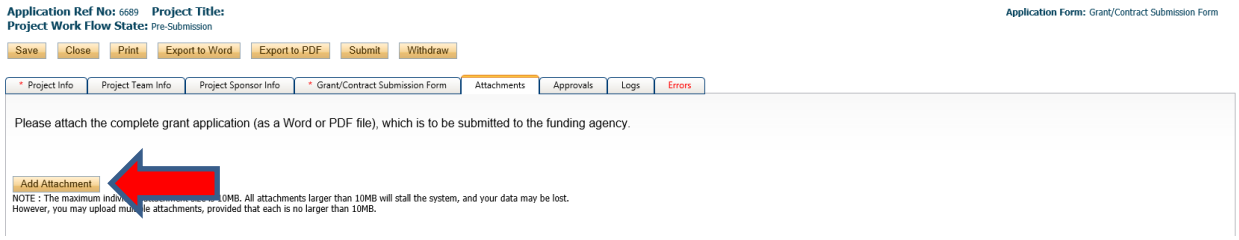


8. Proceed to the "**Grant/Contract Submission Form**" tab. You will see a screen similar to the one below. Answer all of the applicable questions under the "**Grant/Contract Application Form**", "**UNESCO Goals**", "**Certifications and Registrations**", and "**Declarations**" tabs. Questions with a red asterisk (*) are mandatory, but please answer all questions relevant to your application. Please note that these questions are for internal use only and are not used in the external assessment of your application in any way.

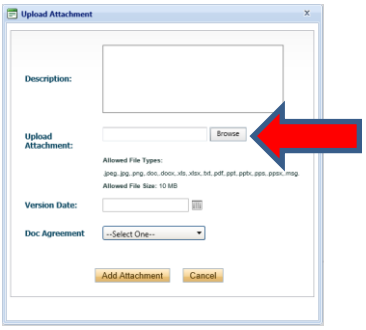
Click on "**Save**" to save the information on the page.



9. Proceed to the "**Attachments**" tab. You will see a screen similar to the one below. This is where you can upload any required attachments to the application (e.g. CV, application form, contract details, etc.). Begin by clicking on "**Add Attachment**".

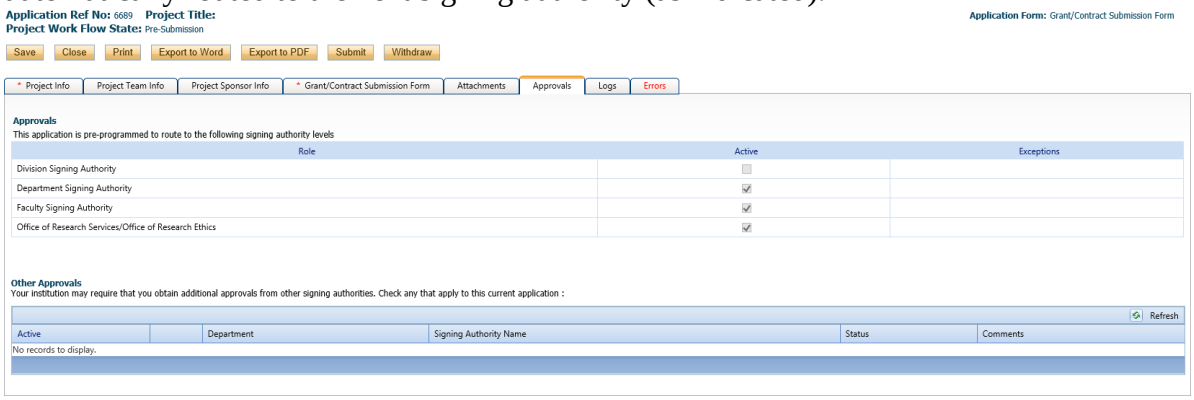


A pop-up window will open. To upload an attachment, click the "**Browse**" button (see below). Enter a **Description**, if applicable. Enter the date of submission as the "**Version Date**". Under the "**Doc Agreement**" pull-down menu, select the type of document you are uploading (Application, Budget, Contract, etc.). Click on "**Add Attachment**."

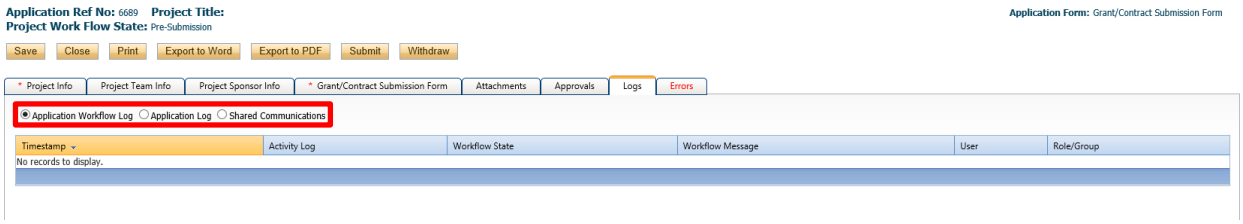


Click "**Save**" to save the information on this page.

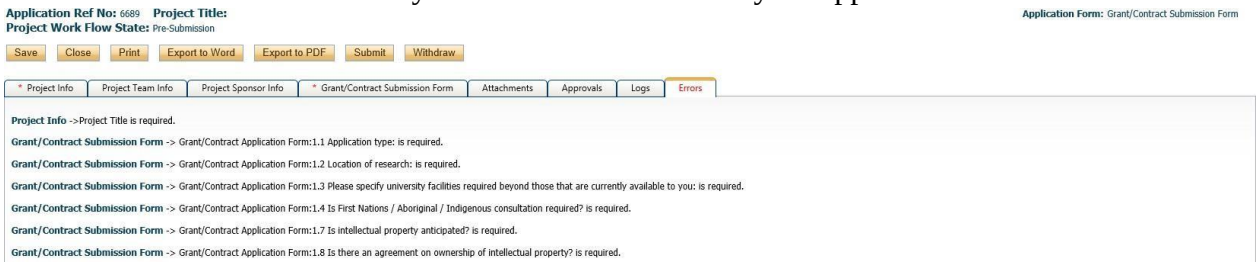
10. "**Approvals**" tab. There is no information to be entered in this section. Applications are automatically routed to the next signing authority (as indicated).



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.



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.

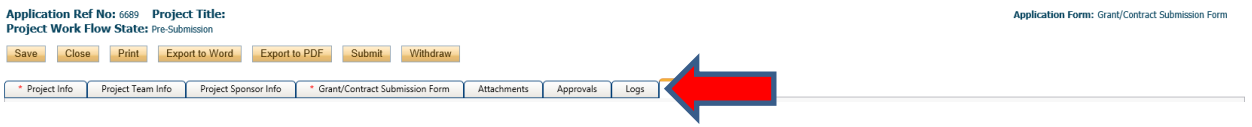
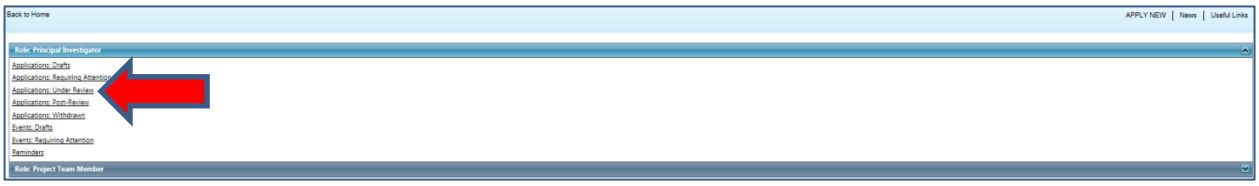


13. **Final Processes**. Click to "**Save**" the information entered in your application. You can also choose to "Print", "Export to Word", or "Export to PDF" your application.

When you are ready, click to **"Submit"** your application. Once you do so, a Work Flow Action comment box will pop up. If you have any additional comments, enter them here. Please do not put any confidential or sensitive information in the comment box, as this can be seen by Office of Research and Innovation staff, signing authorities, and reviewers.

Once you submit, the application will automatically be forwarded to the next signing authority. You will receive confirmation emails each time the application is forwarded and approved through the workflow. If you notice that the application is not moving through the approval process, please follow up with your Chair or Dean. If at any time, further information is required, you will receive an email indicating such.

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".