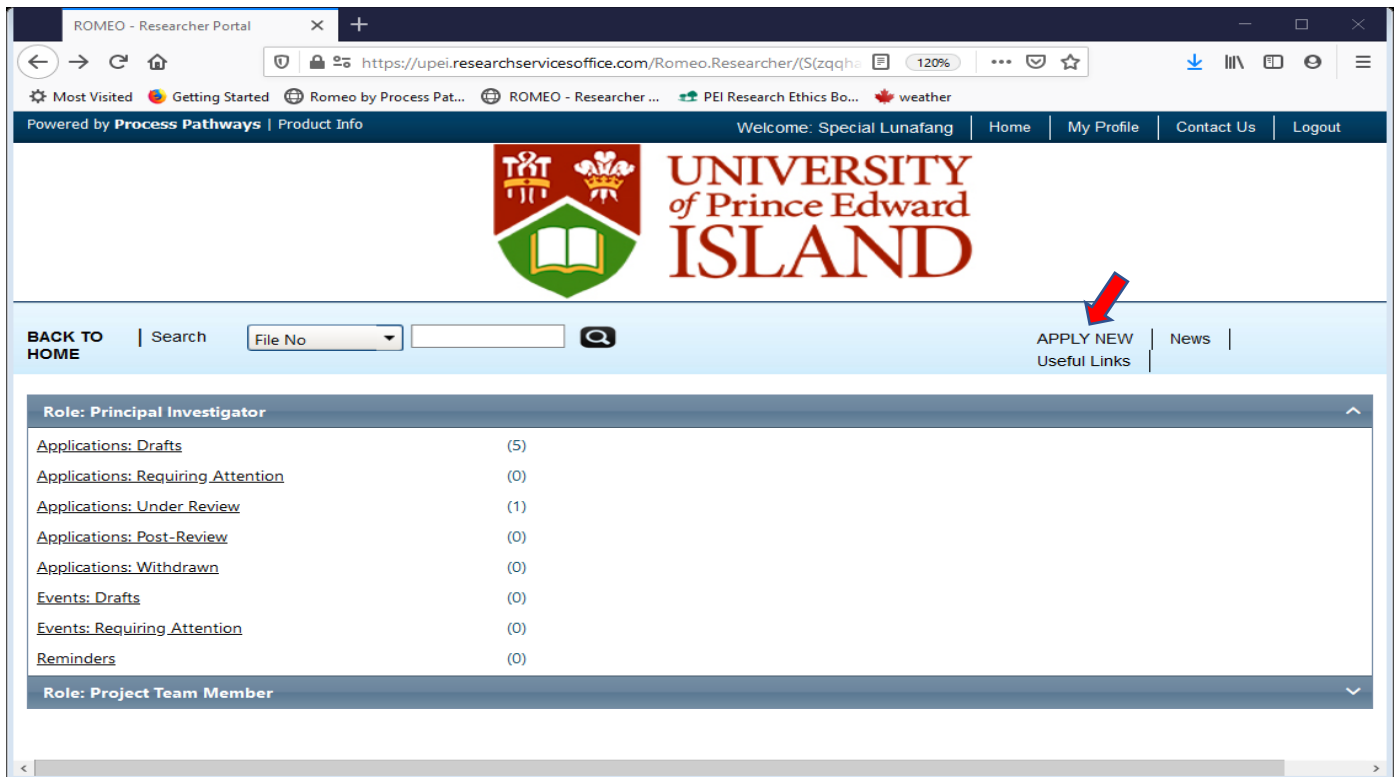**RESEARCHER INSTRUCTIONS FOR SUBMISSION OF APPLICATIONS**

This document includes instructions for the completion and submission of certification applications, as well as research related grants, contracts, agreement forms etc.

The directions for submitting renewal or amendment applications and/or submitting additional funding related documents to already approved funding applications are slightly different from the directions below. Please see the document entitled 'How to complete event forms' for how to submit additional documents to already approved files.

Please note: Users are strongly encouraged to select the SAVE button after completing each tab, or more **frequently**, and before leaving the application for an extended period of time. If you encounter any problems or have questions please contact Research Services at researcherportal@upei.ca or 902-620-5104.

1. Log into the UPEI Researcher Portal at
   https://upei.researchservicesoffice.com/Romeo.Researcher/
2. On the Home page, click on 'Apply New' to access the available application forms.

3. The applications are grouped in 4 categories:
   o Office of Research Services (for grant, contract and other related applications);
   o Animal Use Protocols (AUP);
   o Biosafety Protocols (IBC);
   o Research Ethics Board Protocols (REB).

New Application Forms

Animal Care Committee

Application Name	Description	Status
AUP Research Form	Protocols are due the 1st Friday of every month.	Open
AUP Teaching Form	Protocols are due the 1st Friday of every month.	Open
AUP Service Form	Protocols are due the 1st Friday of every month.	Open
AUP Secondary Data Protocol	Protocols are due the first Friday of every month.	Open

Biosafety Committee

Application Name	Description	Status
Application for Biosafety Permit	Biosafety applications are due the last Friday of each month.	Open

Office of Research Development

Application Name	Description	Status
Transfer of Funds/New Faculty Start Up Funds		Open
Request to Open a Term Research Account		Open
Research Funding Administrative Approvals Form for GRANT applications	This form is required when submitting GRANTS and LETTERS OF INTENT. A copy of the Grant or Letter of Intent must be attached under the attachment tab.	Open
Research Funding Administrative Approvals Form for CONTRACTS	This form is required when submitting all types of CONTRACTS. A copy of the contract must be attached under the attachments tab.	Open

Research Ethics Board

Application Name	Description	Status
Research Ethics Board protocol submission form	The following documents must be completed and submitted with the REB protocol submission form: a. participant form/s including consent form/s, letter/s of information, etc ; b. all research instruments; c. certificate of completion for the TCPS 2 tutorial. Applications must be submitted by a faculty member or another person who is otherwise approved by the REB to hold a Research Ethics Board permit.	Open

4. Click on the Application Name you want to apply for. A screen similar to the screen below will open:

5. On the first tab, the *Project Info* tab, enter the **Project Title** (research project title, etc.). Use the drop down menus to select your anticipated **Start Date** and **End Date.** Adding keywords is not required. If you wish to add one or more keywords then please select them from the drop down menu.

6. Fields marked with a **red asterisk** (*****) are mandatory.

7. If this application is associated with any certification permits, then this information must be included in the 'Related Certifications' section at the bottom of this page. Click 'Add New' to add the associated certification file/s.

8. Remember to select <mark>Save</mark> at the top of the page.

9. Proceed to the 2nd tab, *Project Team Info*. The Principal Investigator Info section will auto-populate with the profile of the person who started the file. For system security and data integrity purposes, email addresses and affiliations can only be edited or updated by the Researcher Portal administrator. Contact Research Services at researcherportal@upei.ca or 902-6205104 if the profile information is incorrect or out of date. It is important to remember that while any project team member can create and complete an application form, the PI must be

the one to click the **Submit** button so that file is attributed to the correct person. Click 'Change PI' in this tab and select the PI name if/as necessary. Once you have transferred the role of PI then you must add yourself as a team member to avoid an error message and loss of the file. **The PI must be UPEI Faculty member.**

10. *Affiliation* will determine which department your application is forwarded to for online approval (workflow). If you are associated with multiple departments, select the **blue arrow** across from Affiliation. Each department should be listed. Select the appropriate department for which you want THIS application forwarded to for approval (your Department Chair). If the appropriate department is not listed then contact Research Services at researcherportal@upei.ca or 902-6205104.

11. Scroll down to 'Other Project Member Info' and click 'Add New' to add team members. Click Search Profiles to bring up the Investigator List to search for the team member. Important: Do not enter Team Member information manually. If you are unable to locate the team member name then please contact researcherportal@upei.ca or 902-620-5104 for help.

12. The 3rd tab is the *Project Sponsor* tab. Click on 'Add New' to open this tab. Click on the 'Agency' button to select the name of the agency/industry associated with this application. Select the program from the options provided. If the agency/industry name and relevant program are not listed then contact Research Services at researcherportal@upei.ca or 902-6205104. **Do not add**

Start and End Dates or click the 'Generate' button. Research Services will add this information to the application. Click **Save** and move to the next tab.

13. The 4th tab will be labelled with the name of the application that you are submitting (i.e., ('Research Funding Administrative Approvals Form for GRANT applications'). Click on this tab to open an additional set of tabs (such as 'Investigators, Constellations, Special Requirements, etc.). The titles will be different for each application, but the process is the same. See the example below.

14. Enter all requested information in all application tabs. Remember that fields marked with a **red asterisk** (*****) are mandatory.

15. The 5th tab, *Attachments*, is where you can upload any required attachments to the application (i.e., copy of grant/contract/NDA, or other documents relevant to the application that is being submitted). Some documents may already be attached in this tab for your convenience. These documents can be downloaded, completed, and re-attached to the application if they are relevant to your application.
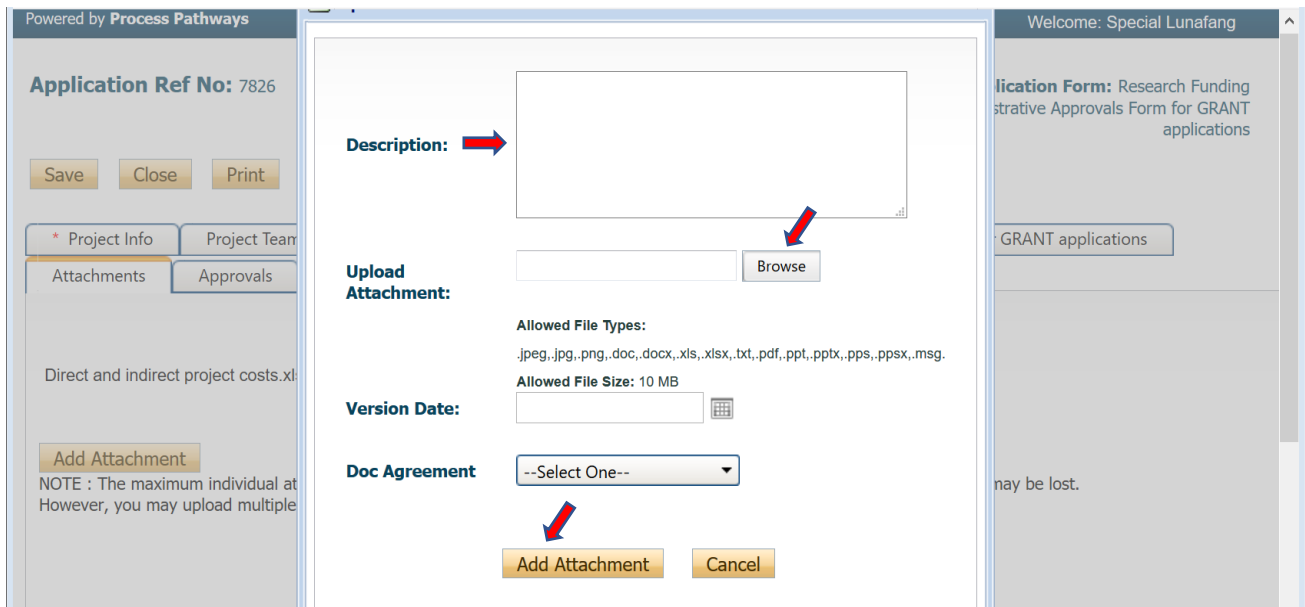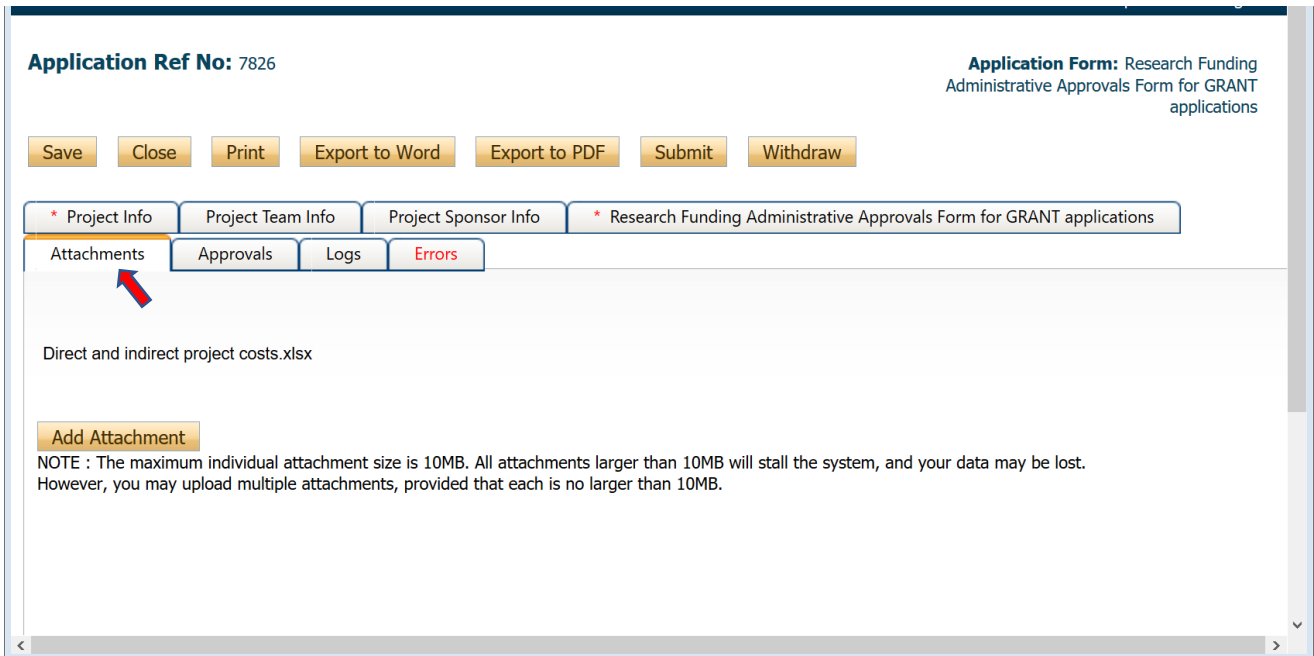
16. Click on the Browse button to find and select the file that you wish to attach. Then click on the Add Attachment button to upload the file. Adding a brief description of the file in the top box ('Description') may be helpful but it is not required. **Note: The maximum file size that can be uploaded is 10 MB**. Remember to click <mark>Save</mark>.

17. The last tab in the application is *Errors*. An application cannot be submitted until all mandatory fields are filled in. The Errors tab provides a list of mandatory fields that were not filled in. When all mandatory fields have been completed this tab will disappear.

18. At any time during the application process, you can **Save**, **Print**, **Close**, **Export to Word** and **Export to PDF,** but an application can only be submitted when the application is free from errors.

19. Select **Submit** to send the application through the on-line approval process (workflow). The application will automatically be forwarded to your Chair/Dean for review and approval. Once it has been approved by the Chair/Dean, it will automatically be forwarded to the Office of Research Services. You will receive confirming emails each time the application is forwarded and approved through the workflow. At any time, if further clarification is required, you will receive an email indicating this.

20. Once you select **Submit** you may add any relevant comments about the application for the Chair/Dean (i.e., 'Please review and approve'). Any comments entered in this tab will be

displayed with the application and are housed under the **Logs** tab (**Application Workflow Log**). The Logs tab tracks all data entry and workflow activities.

21. You can view the status of your application at any time under 'Applications: Under Review'. Select View to enter the application.

If you encounter any problems or have any questions about using the Researcher Portal then please contact Research Services at researcherportal@upei.ca or 902-620-5104.