

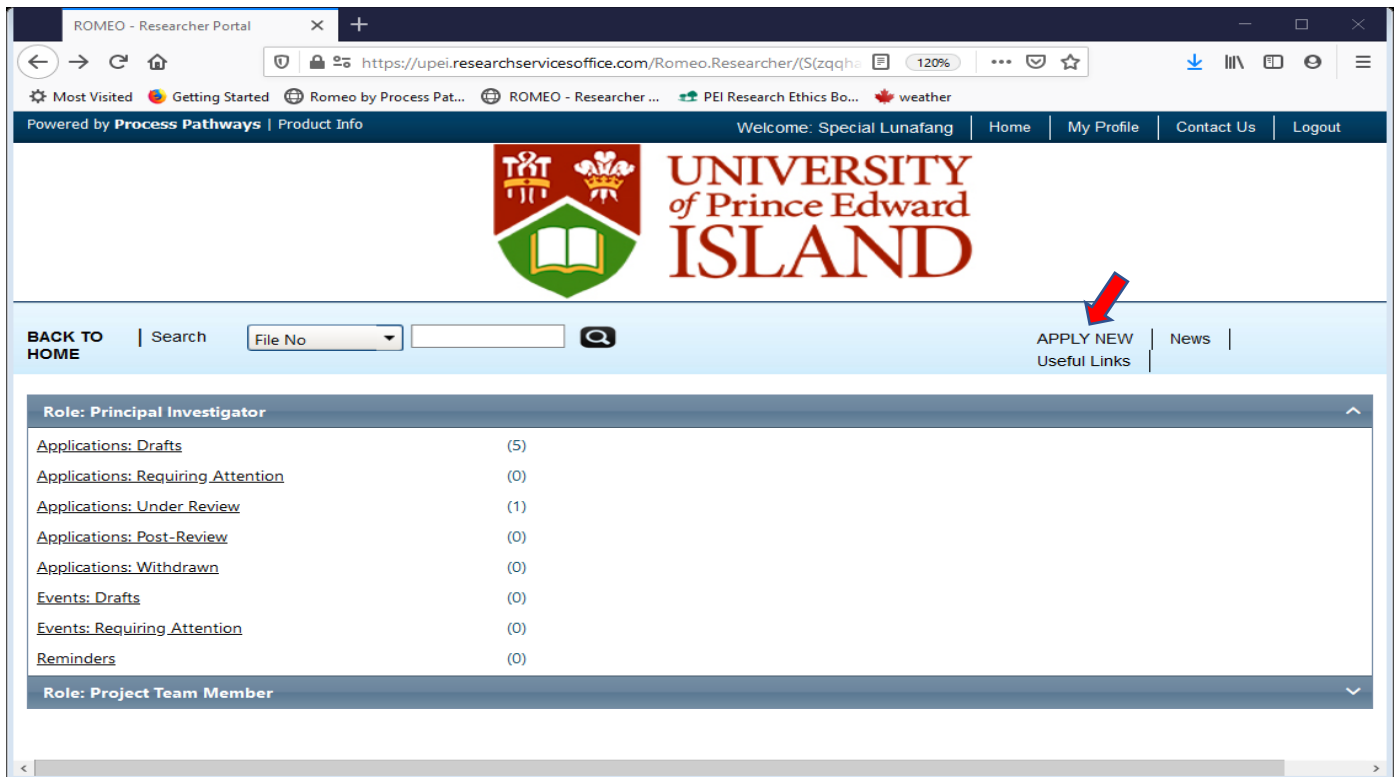
## RESEARCHER INSTRUCTIONS FOR SUBMISSION OF APPLICATIONS

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](mailto: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.



The screenshot shows the UPEI Researcher Portal interface. At the top, there is a navigation bar with links for Home, My Profile, Contact Us, and Logout. Below this is the University of Prince Edward Island logo. A search bar is located in the middle of the page. On the right side, there is a red arrow pointing to the 'APPLY NEW' button. Below the search bar, there is a list of application categories for a Principal Investigator role.

Role: Principal Investigator	
Applications: Drafts	(5)
Applications: Requiring Attention	(0)
Applications: Under Review	(1)
Applications: Post-Review	(0)
Applications: Withdrawn	(0)
Events: Drafts	(0)
Events: Requiring Attention	(0)
Reminders	(0)

Below the list, there is a section for 'Role: Project Team Member'.

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

New Application Forms		
<b>Animal Care Committee</b>		
Application Name	Description	Status
<a href="#">AUP Research Form</a>	Protocols are due the 1st Friday of every month.	Open
<a href="#">AUP Teaching Form</a>	Protocols are due the 1st Friday of every month.	Open
<a href="#">AUP Service Form</a>	Protocols are due the 1st Friday of every month.	Open
<a href="#">AUP Secondary Data Protocol</a>	Protocols are due the first Friday of every month.	Open
<b>Biosafety Committee</b>		
Application Name	Description	Status
<a href="#">Application for Biosafety Permit</a>	Biosafety applications are due the last Friday of each month.	Open
<b>Office of Research Development</b>		
Application Name	Description	Status
<a href="#">Transfer of Funds/New Faculty Start Up Funds</a>		Open
<a href="#">Request to Open a Term Research Account</a>		Open
<a href="#">Research Funding Administrative Approvals Form for GRANT applications</a>	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
<a href="#">Research Funding Administrative Approvals Form for CONTRACTS</a>	This form is required when submitting all types of CONTRACTS. A copy of the contract must be attached under the attachments tab.	Open
<b>Research Ethics Board</b>		
Application Name	Description	Status
<a href="#">Research Ethics Board protocol submission form</a>	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

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

Powered by Process Pathways Welcome: Special Lunafang

Application Ref No: 7826 Application Form: Research Funding Administrative Approvals Form for GRANT applications

Save Close Print Export to Word Export to PDF Submit Withdraw

\* Project Info Project Team Info Project Sponsor Info \* Research Funding Administrative Approvals Form for GRANT applications

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
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- 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.
- Fields marked with a **red asterisk (\*)** are mandatory.
- 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.
- Remember to select **Save** at the top of the page.
- Proceed to the 2<sup>nd</sup> 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](mailto: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](mailto:researcherportal@upei.ca) or 902-6205104.

**Application Ref No:** 7826 **Application Form:** Research Funding Administrative Approvals Form for GRANT applications

Save Close Print Export to Word Export to PDF Submit Withdraw

Project Info Project Team Info Project Sponsor Info \* Research Funding Administrative Approvals Form for GRANT applications

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: [v] Last Name\*: Lunafang First Name\*: Special

Affiliation\*: Atlantic Veterinary College\Animal Resources

Position: Graduate Student

Institution: University of Prince Edward

Phone1: [ ] Phone2: [ ]

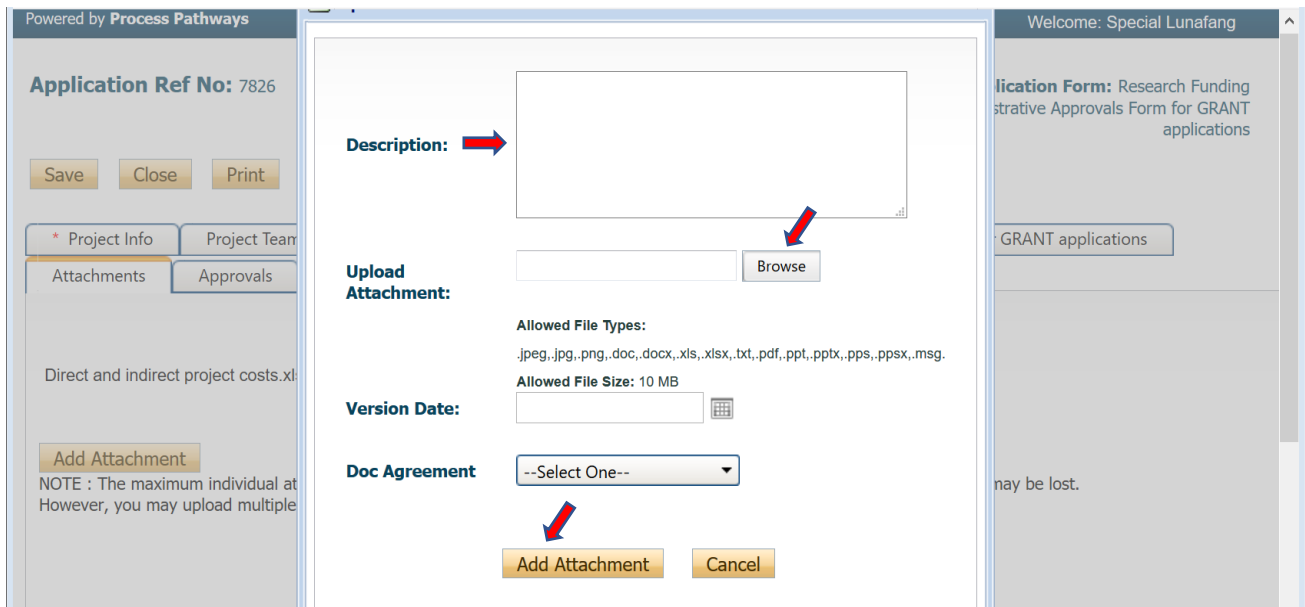
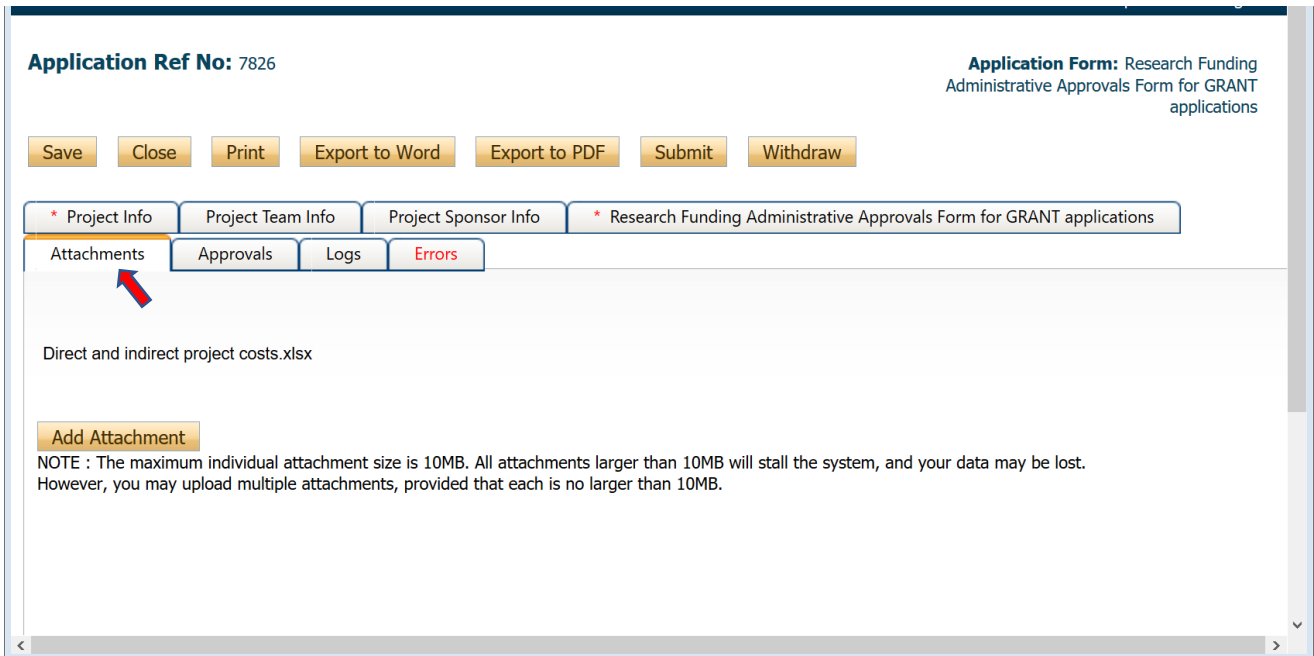
Email\*: knightmj481@gmail.com Fax: [ ]

Primary Address: [ ] Alternate Address: [ ]

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](mailto:researcherportal@upei.ca) or 902-620-5104 for help.
12. The 3<sup>rd</sup> 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](mailto: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.

- The 4<sup>th</sup> 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.
- Enter all requested information in all application tabs. Remember that fields marked with a **red asterisk (\*)** are mandatory.
- The 5<sup>th</sup> 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 **Save**.
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.

The screenshot shows a web application interface for 'Research Funding Administrative Approvals Form for GRANT applications'. The top navigation bar includes 'Powered by Process Pathways' and 'Welcome: Special Lunafang'. The application reference number is 7826. A red arrow points to the 'Submit' button in the top action bar, which also contains 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', and 'Withdraw'. Below the navigation tabs, the 'Errors' tab is selected. The main form area contains fields for 'Title', 'Start Date', 'End Date', and 'Keywords', along with 'Add' and 'Clear all' buttons. At the bottom, there is a 'Related Certifications' section with instructions and 'Add New' and 'Search' buttons, and a table with columns for Certification Category, File No, Status, Renewal Date, and Notes.

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.

UNIVERSITY of Prince Edward ISLAND

BACK TO HOME | Search | File No | [ ] | [ ] | APPLY NEW Useful Links | News |

Role: Principal Investigator

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Applications: Post-Review	(0)
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