ROMEO Researcher Portal

How to Apply for Ethics and Institutional Authorization through the ROMEO Researcher Portal

Thunder Bay Regional Health Sciences Centre

Thunder Bay Regional Health Research Institute

ROMEO

Exceptional care for every patient, every time.

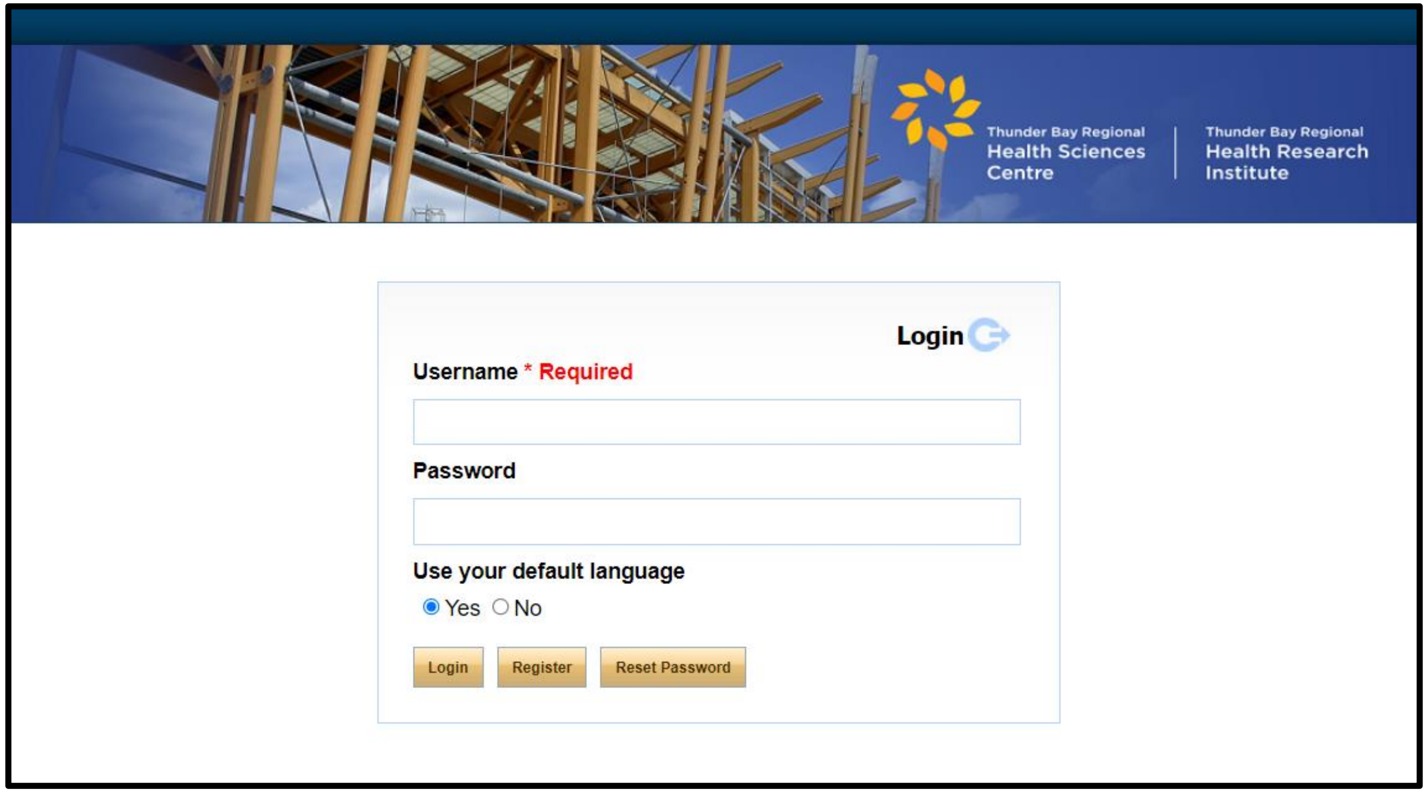
STRATEGIC PLAN 2026

Version Date: November 2022

Step 1: Logging into the ROMEO Research Portal

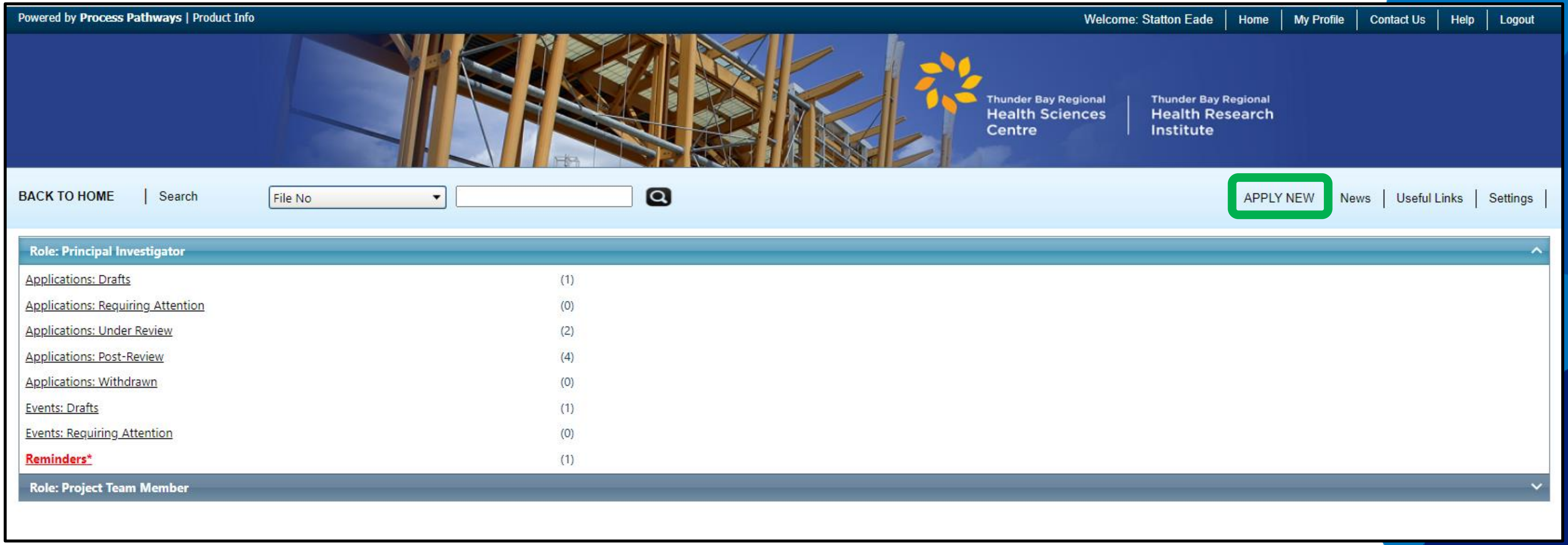
- The **Researcher Portal** is available through the following link: https://tbrhsc-tbrhri.researchservicesoffice.com/Romeo.Researcher
- For TBRHSC staff, it is also accessible through the **ZENworks** under this icon:

ROMEO



Step 2: Accessing List of Applications

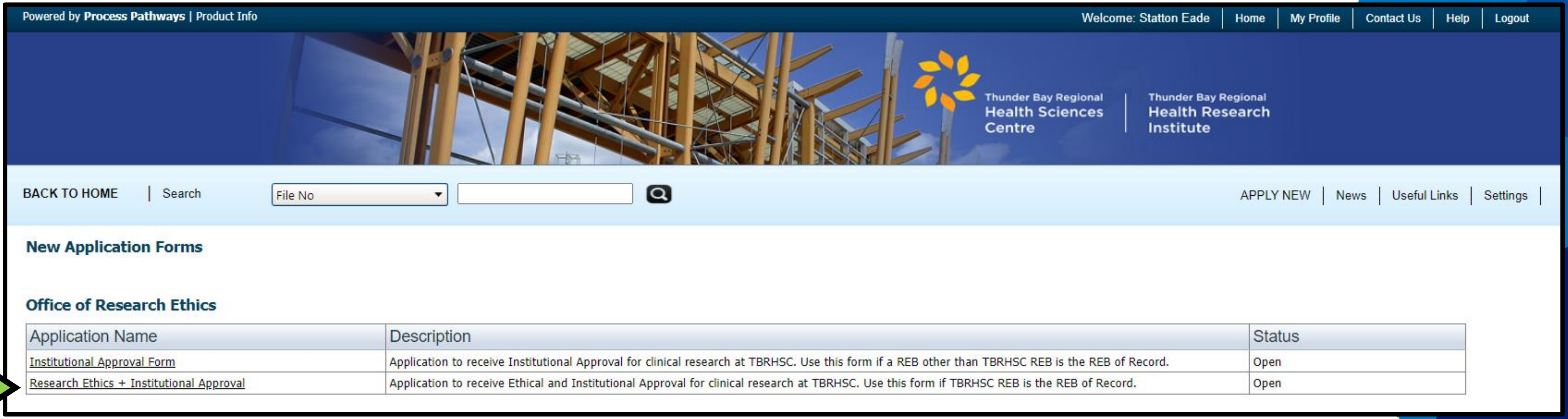
- Select “**APPLY NEW**” from the upper right section of your home page to access the list of currently active applications in the Researcher Portal



Step 3: Select the Appropriate Application

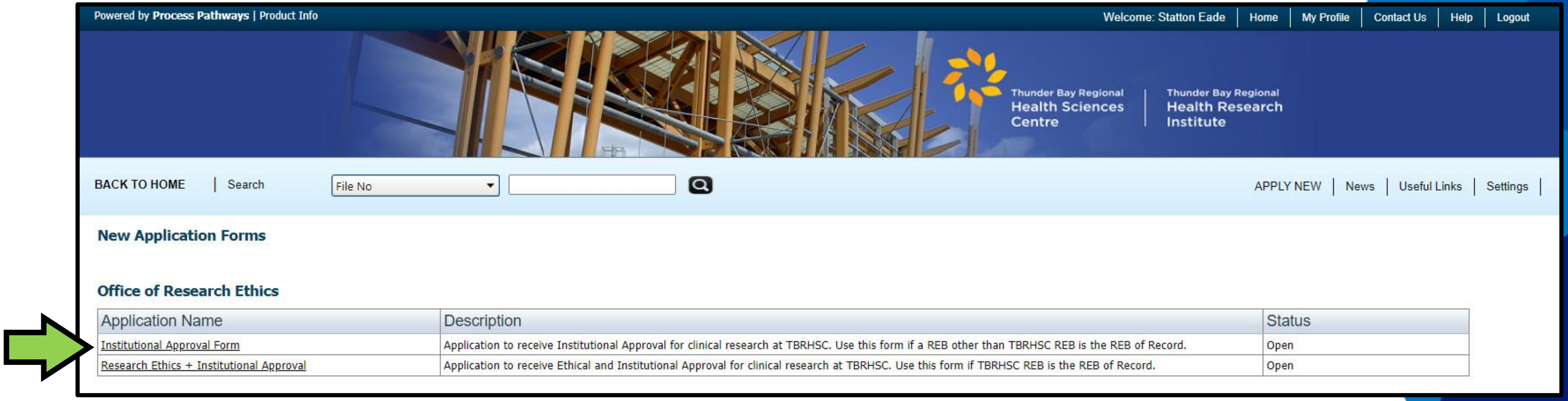
- If you are applying for REB approval and TBRHSC is the REB of Record, use the form titled "**Research Ethics + Institutional Approval**"

NOTE: Ensure you have submitted a Project Intake form prior to filling out or submitting an application.



Step 3: Select the Appropriate Application

- If you are applying *only* for Institutional Approval (research where another institution is the REB of Record), use the form titled "**Institutional Approval Form**". This form should be used when Lakehead University or a Clinical Trials Ontario REB is the REB of record for your project.

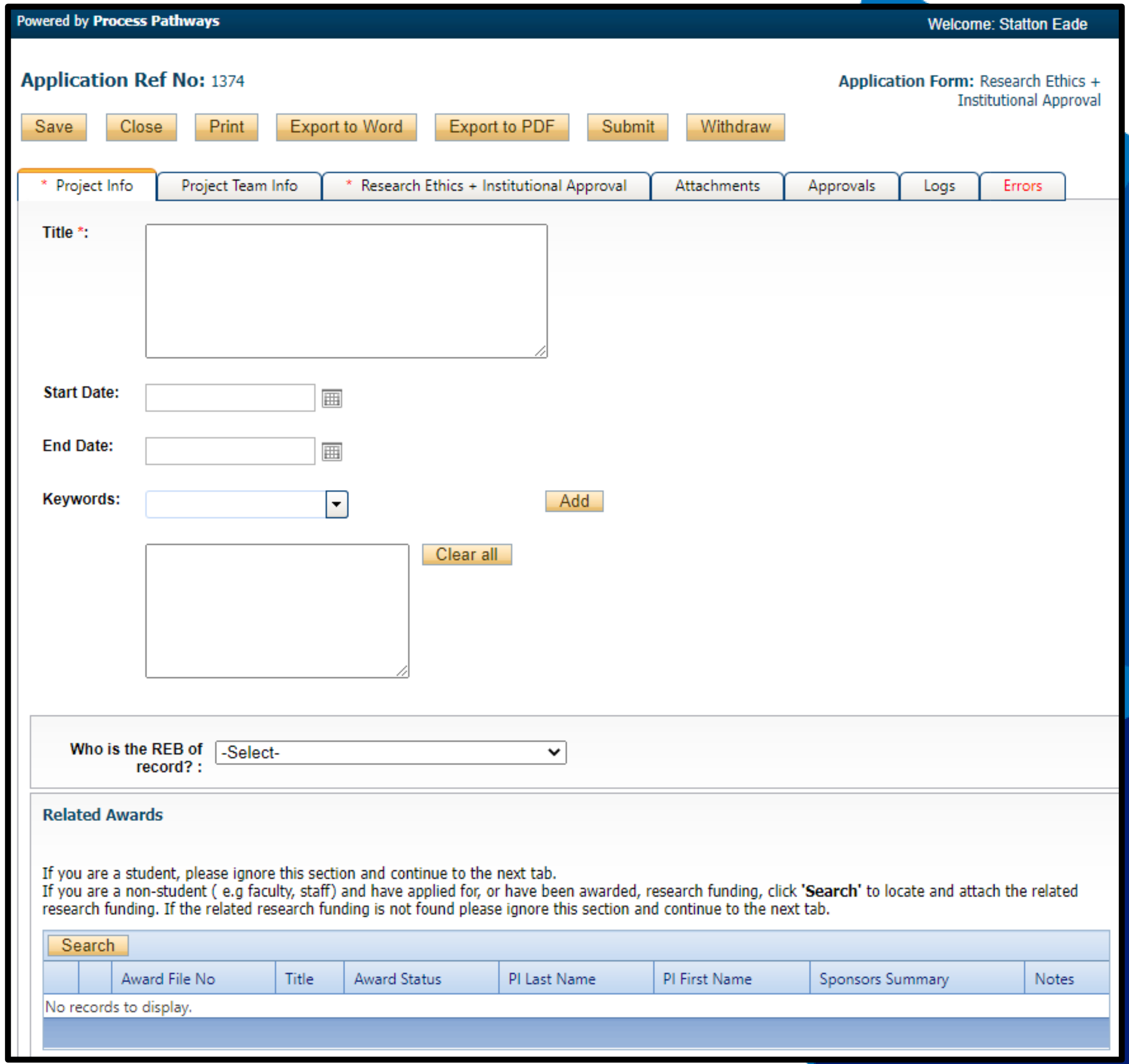


Step 4: Completing the Application

Project Info Tab

- All project team members can contribute to the content of the application prior to submission, but only the Principal Investigator (PI) will be able to submit the completed form.
- Please note that ‘Start Date’ and ‘End Date’ are used for administrative purposes and will be entered by RE&A Office staff. Please leave these fields blank.
- The “Related Awards” section can be skipped.

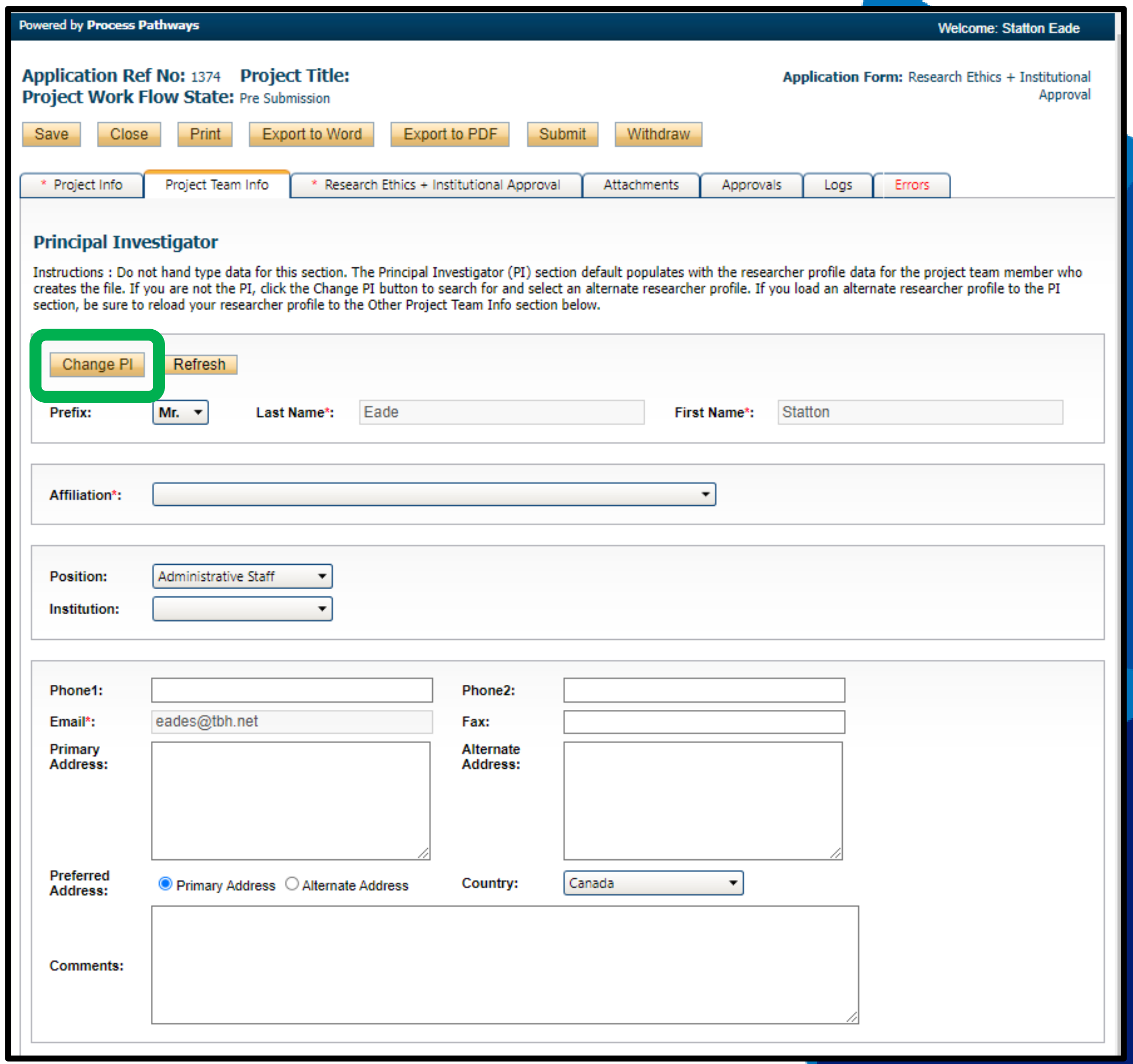
- **NOTE**: Fields marked with a red asterisk (*) are mandatory. You will not abe able to submit your application if any of these fields are blank.



Step 4: Completing the Application

Changing the Principal Investigator:

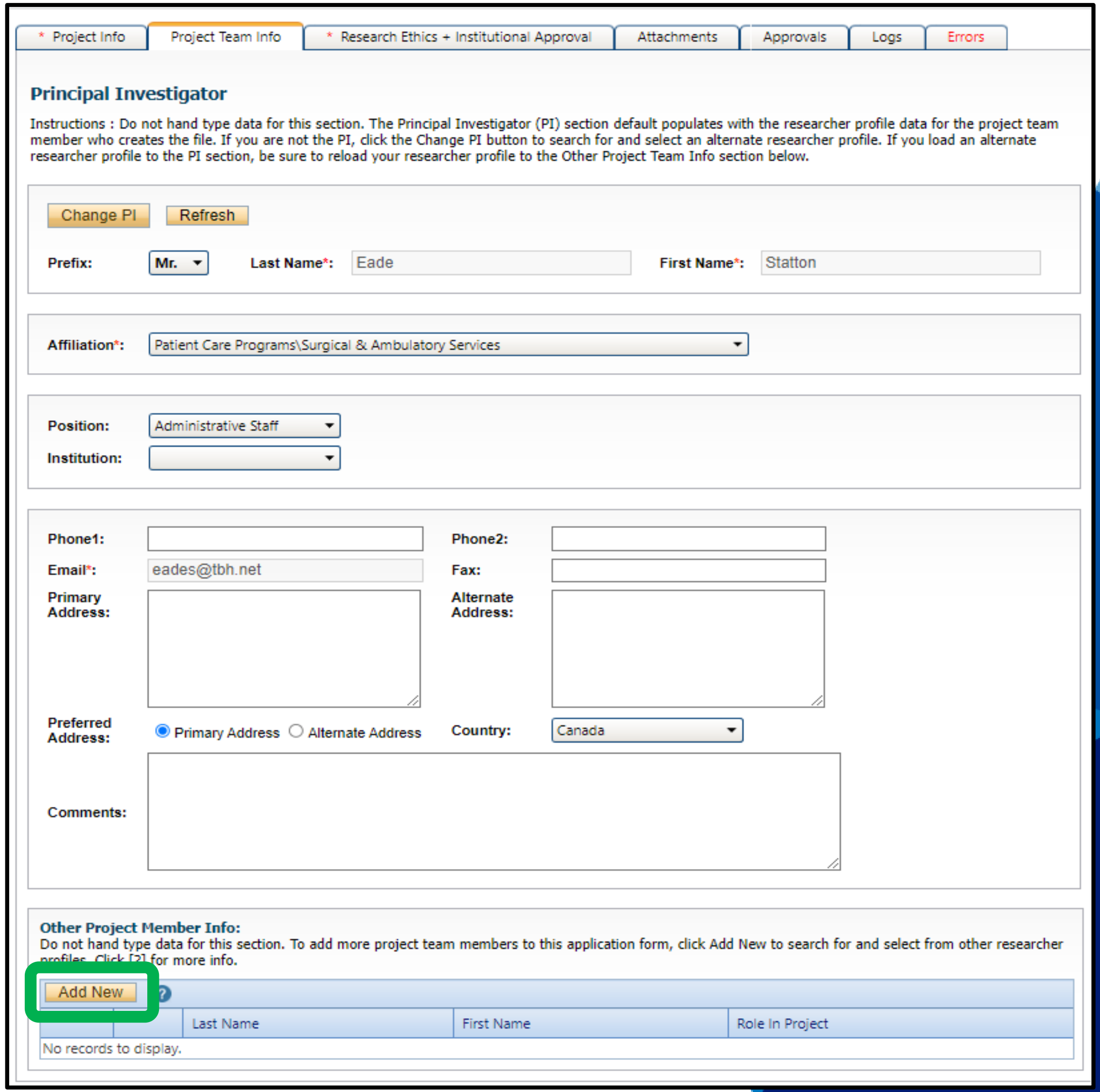
- The Principal Investigator info section will automatically populate with your profile information. If you are not the Principal Investigator, select “**Change PI**” and search for the correct Investigator.
- Selecting Change PI will open up a search window with all registered investigators at TBRHSC. Search for the user by name and click **Select** beside their name to assign them as the PI. If you don’t see their name, they will need to register for the portal before being added.
- **Important:** DO NOT change the PI’s “Last Name” and “First Name” manually. Always use the **Change PI** feature and search by name.



Step 4: Completing the Application

Adding Team Members:

- **Important:** If the PI role has been updated, the current applicant must be added as a Team Member prior to closing the application. Failing to do so will result in you losing access to the application form once you exit the application.
- To add additional Team Members, click on **Add New** under **Other Project Member Info**. If they are already in the database, you can search for them by their name. Select **Search Profiles** and type in the last name of the member you would like to add, then click Search. Click **Select** for the desired researcher and their information will be populated.
- **DO NOT MANUALLY INPUT DATA FOR THIS SECTION**. If the Researcher is not in the database, they must self-register for the portal from the login page. Contact the system administrator (Statton.Eade@tbh.net) if assistance is required to register.
- The Role of each Team Member will be defaulted to Best Contact. Ensure Role in Project (Best Contact, Co-Investigator, Team Member) is correctly selected for each Team Member

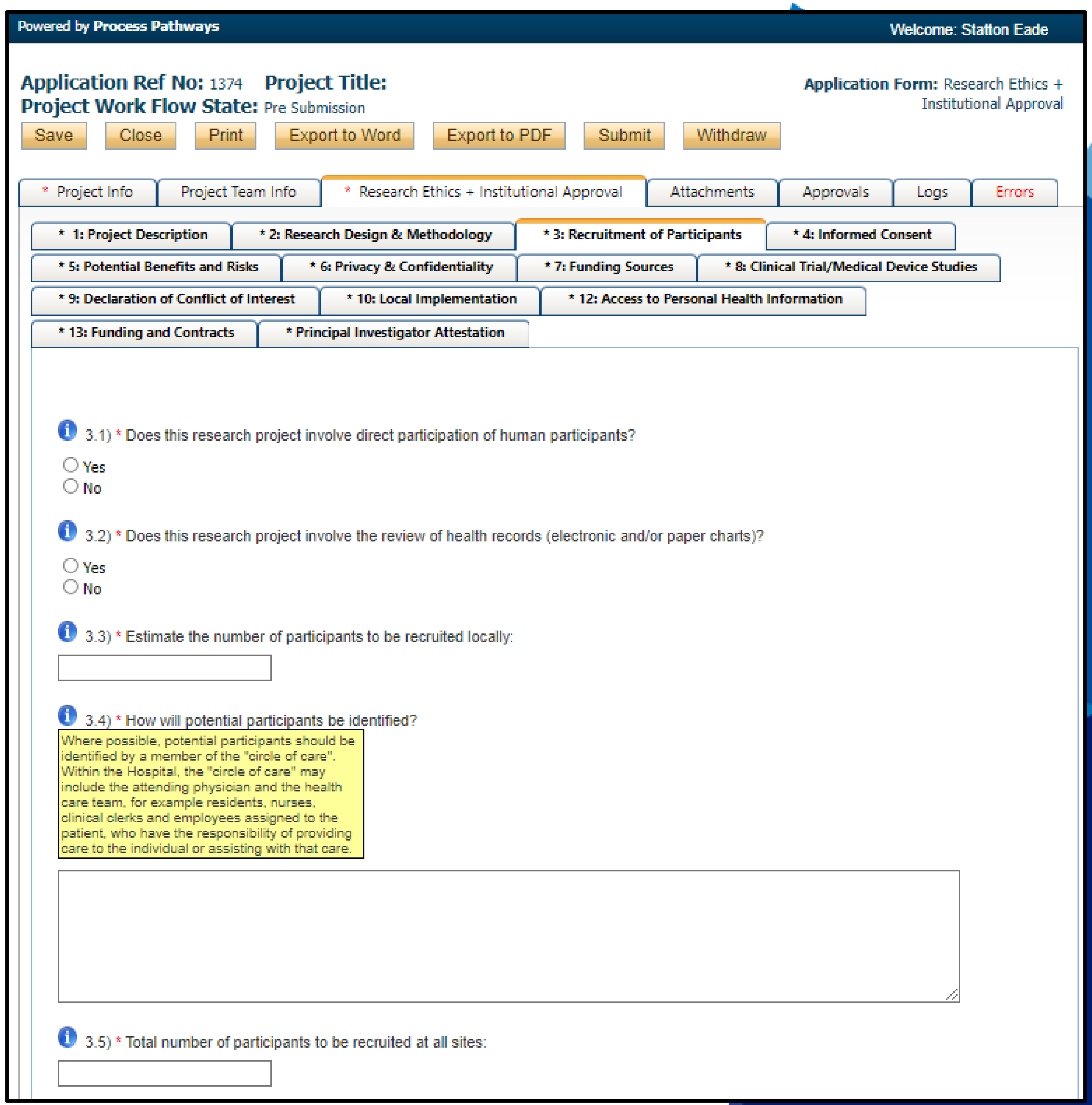


Step 4: Completing the Application

Filling out the Ethics Application Form:

- The third tab, Research Ethics + Institutional Authorization, contains several sub-tabs all of which contain the questions and content of the REB application. Some questions will have additional information or guidance
- Complete all required and/or applicable fields for your project
- Reminder that fields marked with a red asterisk (*) are mandatory

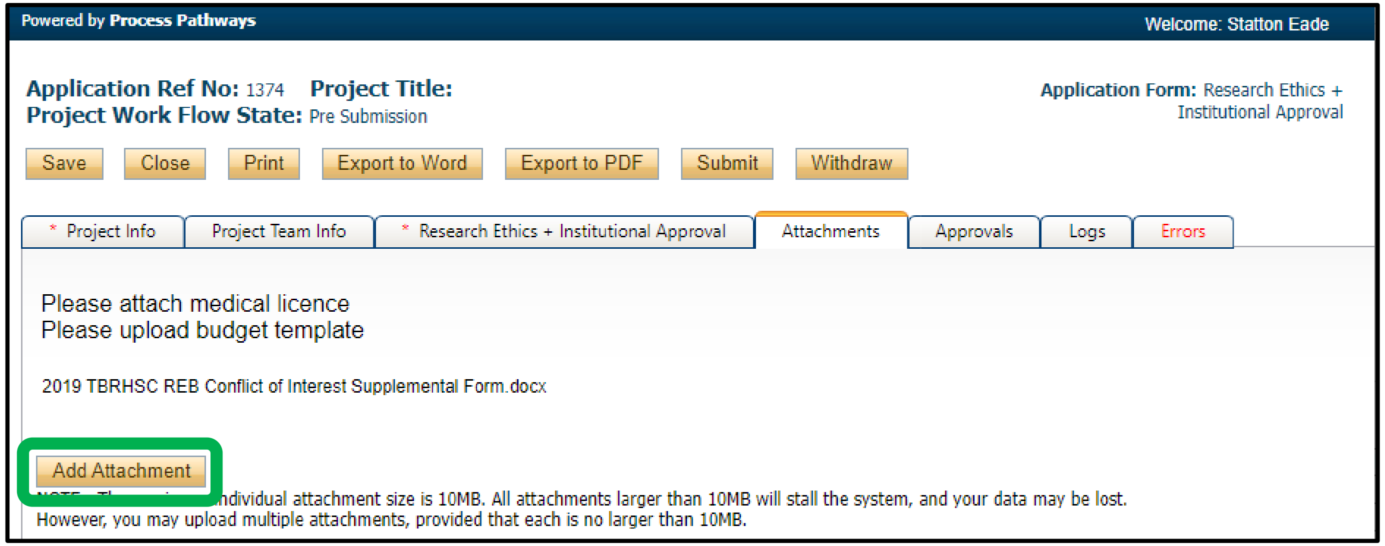
<u>Important:</u> ROMEO does not have an automatic save feature. Users are encouraged to click **Save** after completing each tab.

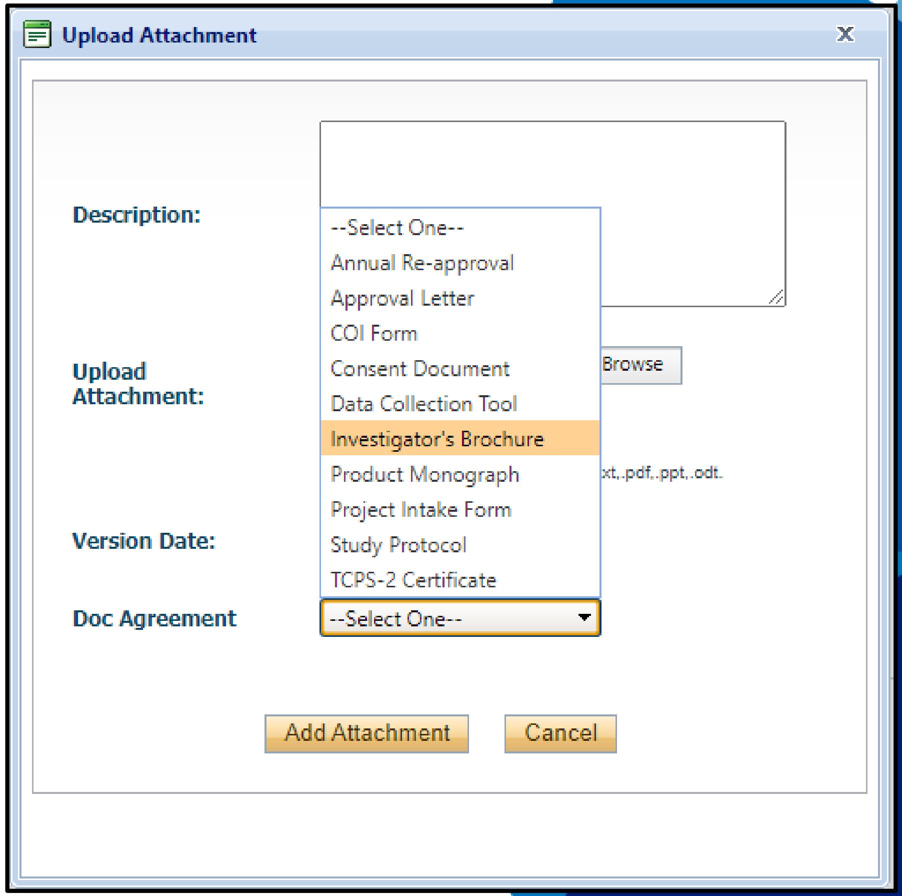


Step 4: Completing the Application

Add Attachments to your Application:

- Under the attachments tab, attach all documentation related to the project by clicking **Add Attachment**
- For each attachment, indicate the version date and appropriate type of attachment from the drop-down list

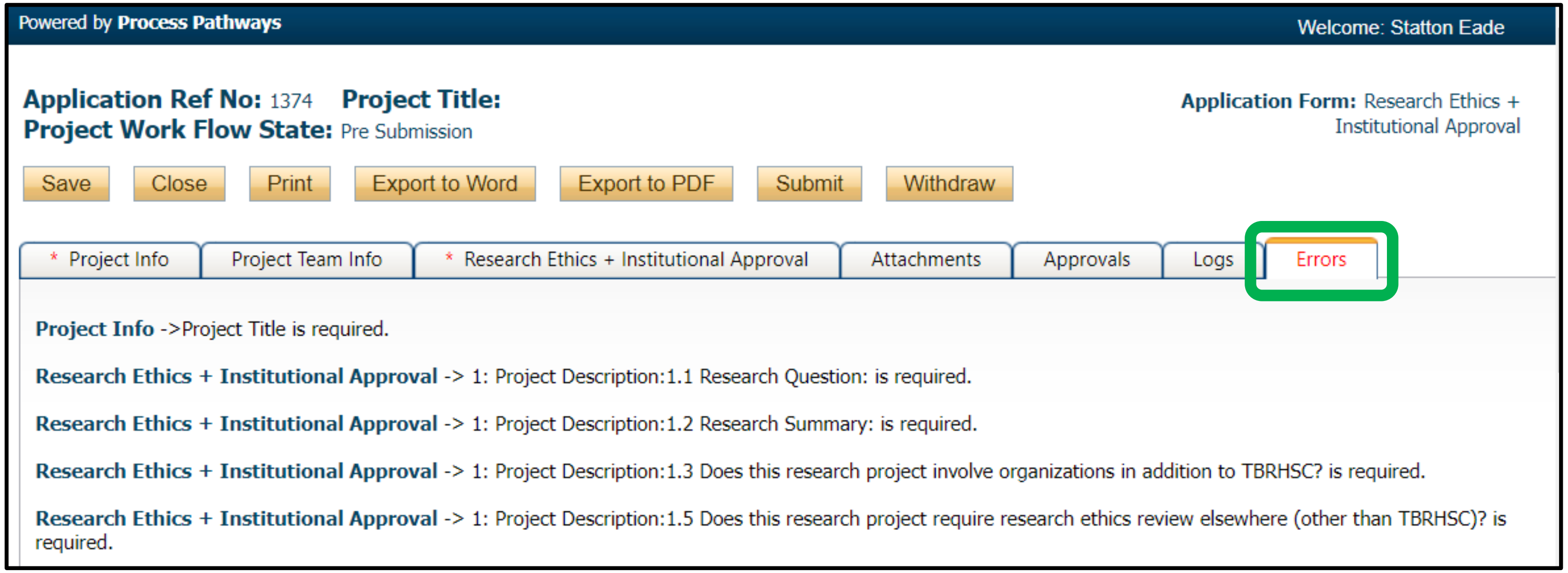




Step 4: Completing the Application

Errors Tab:

If all mandatory fields are NOT complete, there will be a final tab called 'Errors'. Click on the 'Errors' tab to see a list of all incomplete fields. An application cannot be submitted until all mandatory fields are filled in. When all mandatory fields have a valid response, the 'Errors' tab will disappear and the application can be submitted.



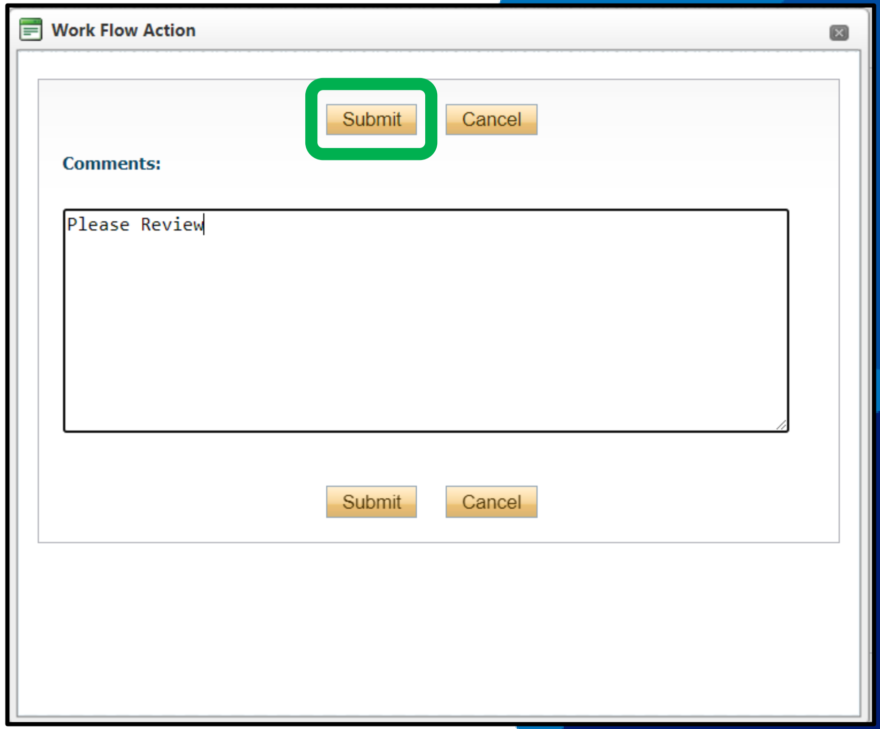
Step 5: Submitting the Application

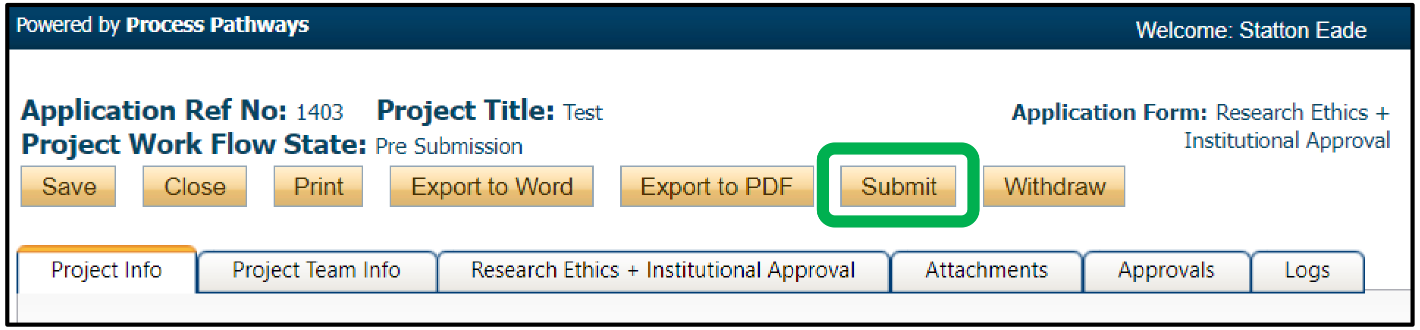
Final Steps:

To submit the application, select the yellow '**Submit**' button. This option will only be available to the **Principal Investigator** listed on the project.

Include a message with your submission in the Work Flow Action box that appears after you select 'Submit'.

Your application will now automatically be routed to the Director of the Department/Program of the listed **Affiliation** for the Principal Investigator (for TBRHSC staff only). They will approve the application before it is routed to the Research Ethics & Authorization Office for full review.





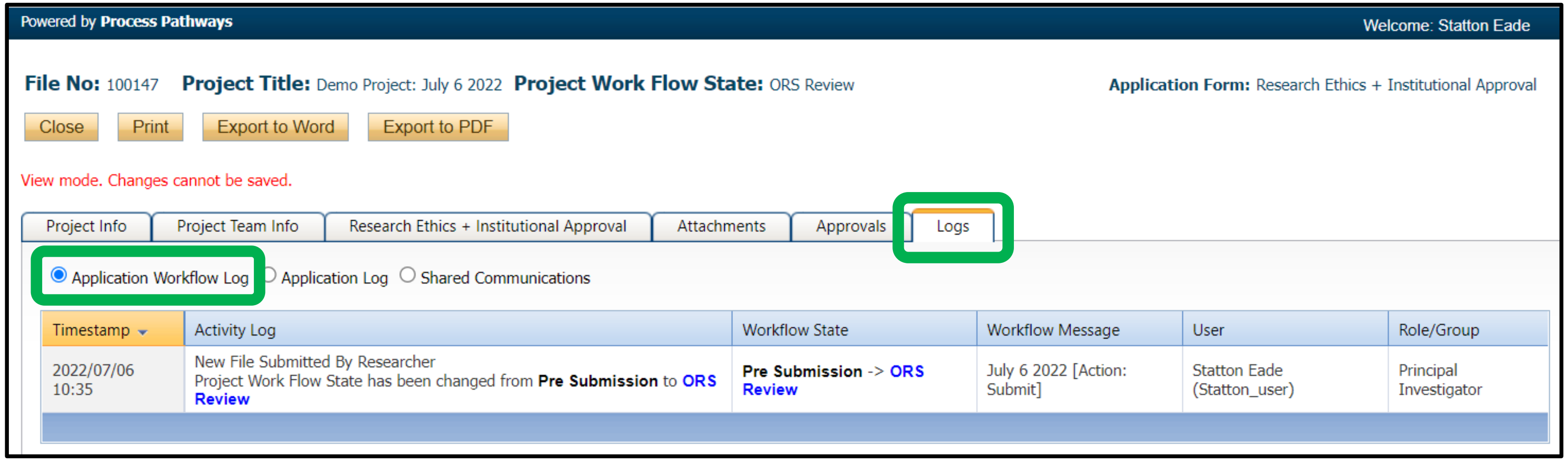
Step 5: Submitting the Application

Post-Submission:

Once your project has been submitted, you will receive a confirmation email from research@tbh.net. You will also receive notification each time the application is approved through the workflow and is routed to the next stage of review.

At any time, you can view the status of your application by logging into the Researcher Portal and selecting the '**Applications: Under Review'** quick link.

In the application, look under the '**Logs**' tab, select '**Application Workflow Log**' and you will see a log of any action taken on the project.



If you encounter any problems or have questions about the review process, please contact the Research Ethics & Authorization Coordinator, Statton Eade, at 807-684-6359 or Statton.Eade@tbh.net

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