

ROMEIO Researcher Portal

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



Thunder Bay Regional
Health Sciences
Centre

Thunder Bay Regional
Health Research
Institute



ROMEIO

Exceptional **care** for every patient, every time.

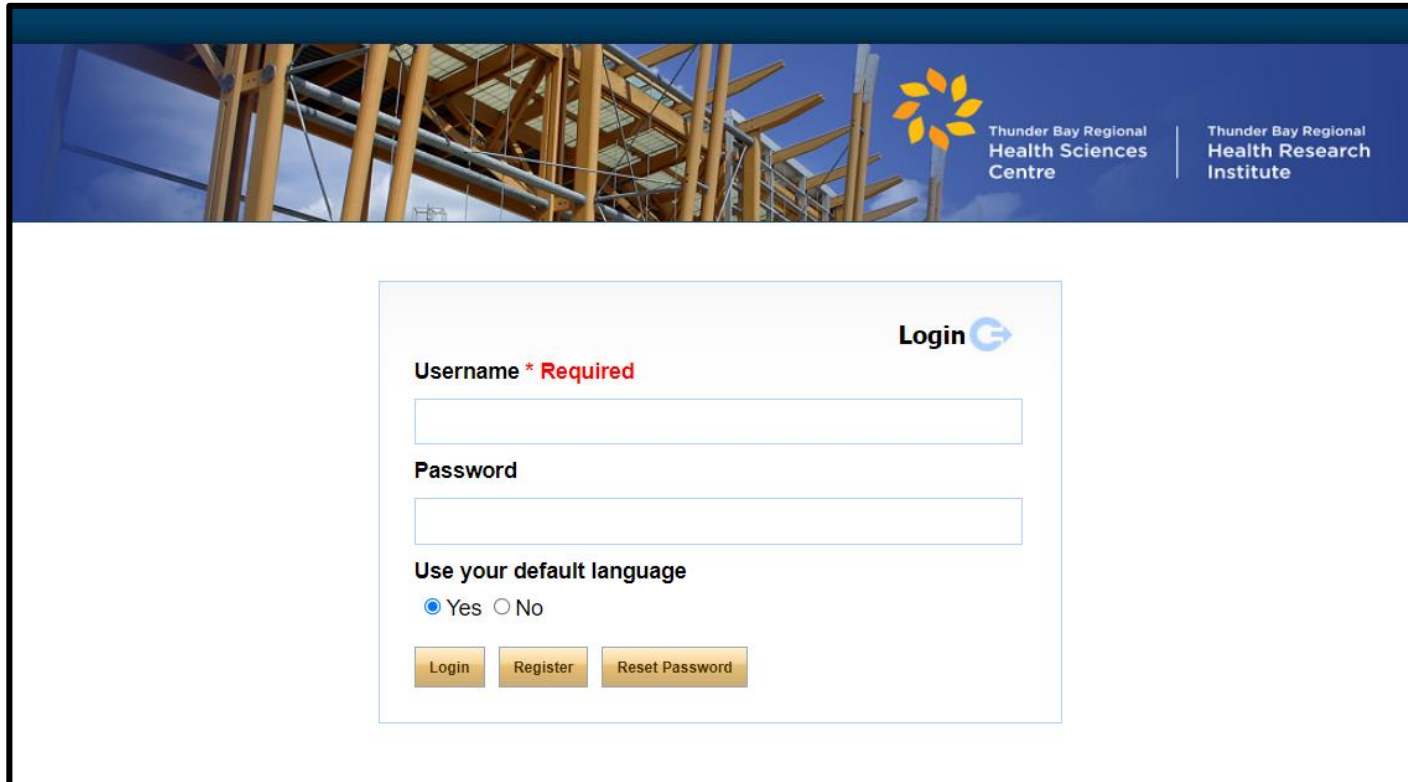
Version Date: November 2022

STRATEGIC PLAN


2026

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:



Thunder Bay Regional Health Sciences Centre | Thunder Bay Regional Health Research Institute

Login 

Username * Required

Password

Use your default language

Yes No

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

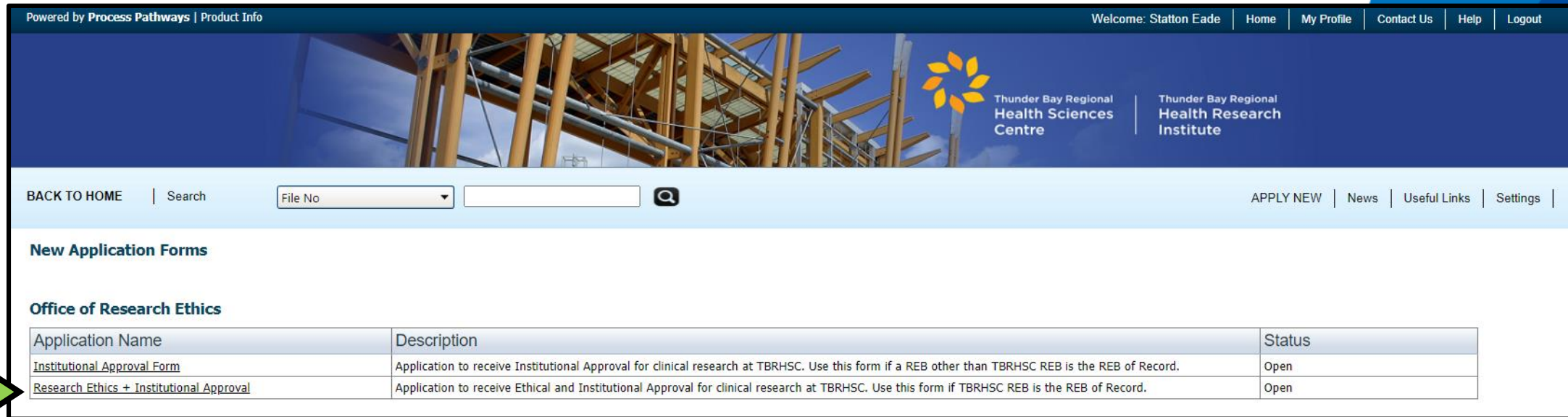
The screenshot displays the Researcher Portal interface. At the top, there is a navigation bar with the text "Powered by Process Pathways | Product Info" on the left and "Welcome: Statton Eade | Home | My Profile | Contact Us | Help | Logout" on the right. Below this is a header section with a background image of a building's wooden frame. On the left of the header is the Thunder Bay Regional Health Sciences Centre logo, and on the right is the Thunder Bay Regional Health Research Institute logo. A search bar is located below the header, containing a "File No" dropdown menu, a search input field, and a search icon. To the right of the search bar is a green button labeled "APPLY NEW", which is highlighted with a green border. Further right are links for "News", "Useful Links", and "Settings". Below the search bar is a list of application and event categories, organized by role. The first role is "Principal Investigator", and the second is "Project Team Member".

Role: Principal Investigator	
Applications: Drafts	(1)
Applications: Requiring Attention	(0)
Applications: Under Review	(2)
Applications: Post-Review	(4)
Applications: Withdrawn	(0)
Events: Drafts	(1)
Events: Requiring Attention	(0)
Reminders*	(1)
Role: Project Team Member	

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.



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[BACK TO HOME](#) | Search

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New Application Forms

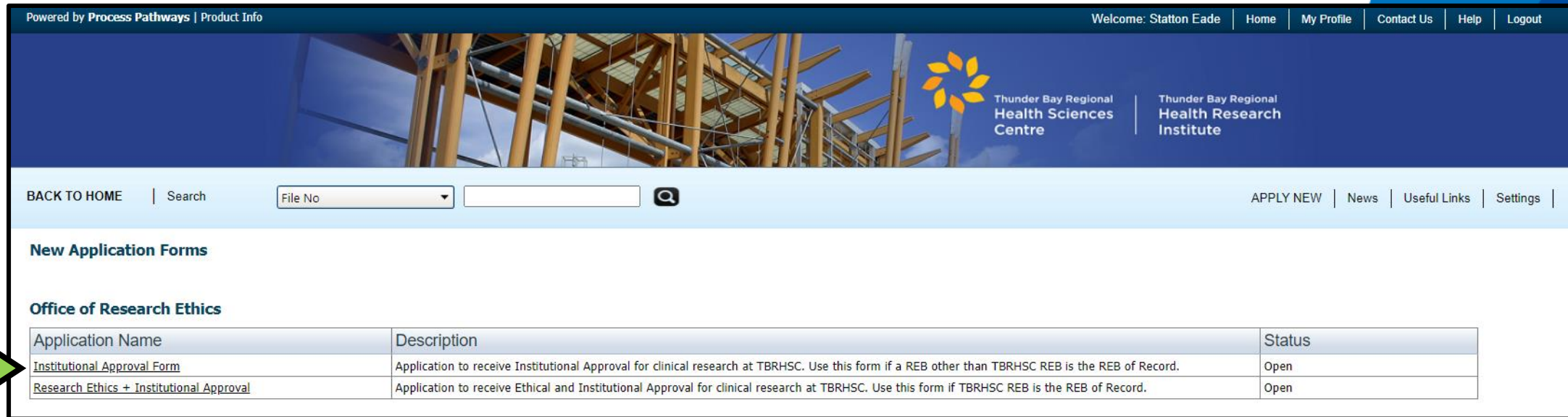
Office of Research Ethics

Application Name	Description	Status
Institutional Approval Form	Application to receive Institutional Approval for clinical research at TBRHSC. Use this form if a REB other than TBRHSC REB is the REB of Record.	Open
Research Ethics + Institutional Approval	Application to receive Ethical and Institutional Approval for clinical research at TBRHSC. Use this form if TBRHSC REB is the REB of Record.	Open

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.

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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 be able to submit your application if any of these fields are blank.

The screenshot displays a web application interface for 'Process Pathways'. At the top, it shows 'Powered by Process Pathways' and 'Welcome: Statton Eade'. The main header includes 'Application Ref No: 1374' and 'Application Form: Research Ethics + Institutional Approval'. Below this are several action buttons: Save, Close, Print, Export to Word, Export to PDF, Submit, and Withdraw. The interface features a tabbed navigation system with the following tabs: Project Info (active), Project Team Info, Research Ethics + Institutional Approval, Attachments, Approvals, Logs, and Errors. The 'Project Info' tab contains several input fields: 'Title *:' (a large text area), 'Start Date:' (a date picker), 'End Date:' (a date picker), and 'Keywords:' (a dropdown menu with an 'Add' button and a 'Clear all' button). Below these fields is a dropdown menu labeled 'Who is the REB of record? :'. The 'Related Awards' section includes a search box and a table with columns: Award File No, Title, Award Status, PI Last Name, PI First Name, Sponsors Summary, and Notes. The table currently shows 'No records to display.'

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.

Powered by Process Pathways Welcome: Statton Eade

Application Ref No: 1374 **Project Title:** **Application Form:** Research Ethics + Institutional Approval

Project Work Flow State: Pre Submission

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.

Prefix: **Last Name*:** **First Name*:**

Affiliation*:

Position: **Institution:**

Phone1: **Phone2:**

Email*: **Fax:**

Primary Address:
Alternate Address:

Preferred Address: Primary Address Alternate Address **Country:**

Comments:

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

The screenshot shows a web application interface with several tabs at the top: Project Info, Project Team Info, Research Ethics + Institutional Approval, Attachments, Approvals, Logs, and Errors. The main section is titled "Principal Investigator" and contains instructions: "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." Below the instructions are buttons for "Change PI" and "Refresh". The form fields include: Prefix (Mr.), Last Name (Eade), First Name (Statton), Affiliation (Patient Care Programs\Surgical & Ambulatory Services), Position (Administrative Staff), and Institution. The "Other Project Member Info" section includes fields for Phone1, Phone2, Email (eades@tbh.net), Fax, Primary Address, Alternate Address, Preferred Address (radio buttons for Primary and Alternate), and Country (Canada). A "Comments" field is also present. At the bottom, there is an "Add New" button highlighted with a green circle, and a table with columns for Last Name, First Name, and Role In Project. The table currently shows "No records to display."

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

Important: ROME0 does not have an automatic save feature. Users are encouraged to click **Save** after completing each tab.

The screenshot displays the ROME0 application form interface. At the top, it shows 'Powered by Process Pathways' and 'Welcome: Statton Eade'. The main header includes 'Application Ref No: 1374', 'Project Title:', and 'Application Form: Research Ethics + Institutional Approval'. Below this, there are buttons for 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', 'Submit', and 'Withdraw'. The navigation tabs include 'Project Info', 'Project Team Info', 'Research Ethics + Institutional Approval' (which is selected), 'Attachments', 'Approvals', 'Logs', and 'Errors'. The 'Research Ethics + Institutional Approval' tab is further divided into sub-tabs: '* 1: Project Description', '* 2: Research Design & Methodology', '* 3: Recruitment of Participants', '* 4: Informed Consent', '* 5: Potential Benefits and Risks', '* 6: Privacy & Confidentiality', '* 7: Funding Sources', '* 8: Clinical Trial/Medical Device Studies', '* 9: Declaration of Conflict of Interest', '* 10: Local Implementation', '* 12: Access to Personal Health Information', '* 13: Funding and Contracts', and '* Principal Investigator Attestation'. The main content area shows several questions, each with a red asterisk indicating it is mandatory. Question 3.1 asks 'Does this research project involve direct participation of human participants?' with radio buttons for 'Yes' and 'No'. Question 3.2 asks 'Does this research project involve the review of health records (electronic and/or paper charts)?' with radio buttons for 'Yes' and 'No'. Question 3.3 asks 'Estimate the number of participants to be recruited locally:' with a text input field. Question 3.4 asks 'How will potential participants be identified?' and includes a yellow highlighted box with the following text: 'Where possible, potential participants should be identified by a member of the "circle of care". Within the Hospital, the "circle of care" may include the attending physician and the health care team, for example residents, nurses, clinical clerks and employees assigned to the patient, who have the responsibility of providing care to the individual or assisting with that care.' Below this is a large text area for the answer. Question 3.5 asks 'Total number of participants to be recruited at all sites:' with a text input field.

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

Powered by Process Pathways Welcome: Statton Eade

Application Ref No: 1374 **Project Title:** **Application Form:** Research Ethics + Institutional Approval
Project Work Flow State: Pre Submission

Please attach medical licence
Please upload budget template

2019 TBRHSC REB Conflict of Interest Supplemental Form.docx

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.

Upload Attachment [X]

Description:

Upload Attachment:

Version Date:

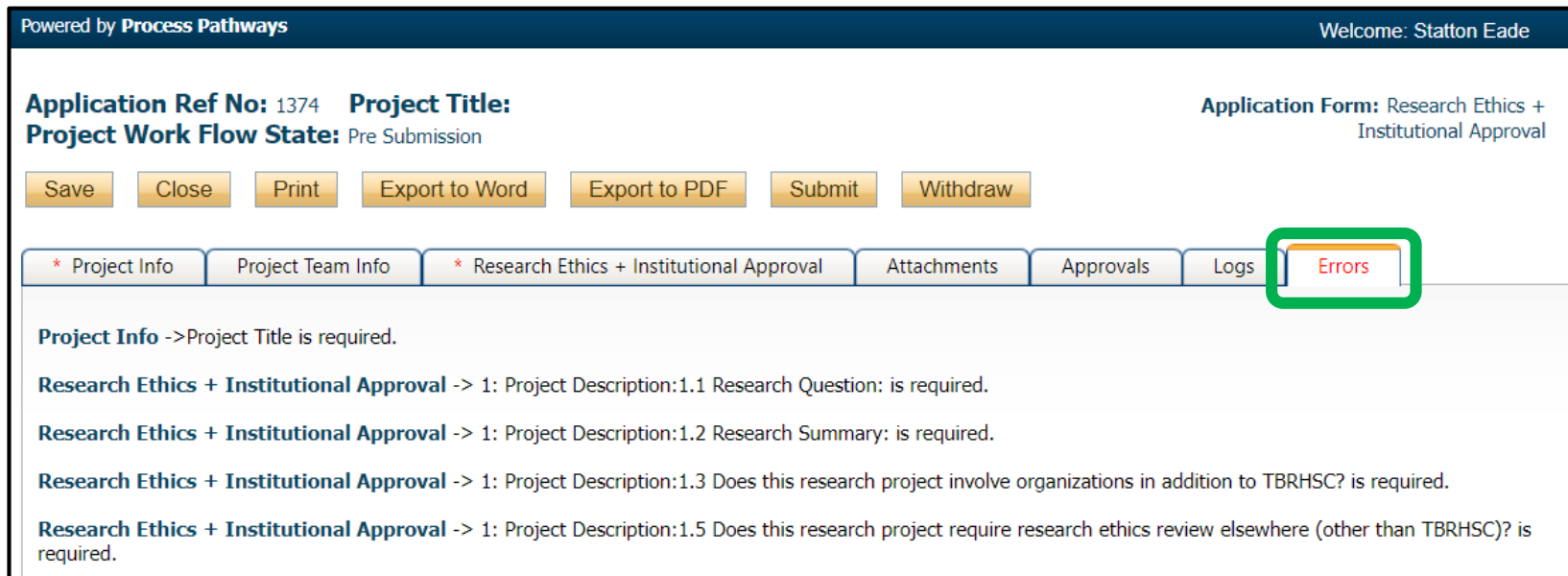
Doc Agreement:

Note: The dropdown menu for Doc Agreement is open, showing options: --Select One--, Annual Re-approval, Approval Letter, COI Form, Consent Document, Data Collection Tool, Investigator's Brochure (highlighted), Product Monograph, Project Intake Form, Study Protocol, TCPS-2 Certificate, and --Select One--.

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.



Powered by **Process Pathways** Welcome: Statton Eade

Application Ref No: 1374 **Project Title:** **Application Form:** Research Ethics + Institutional Approval
Project Work Flow State: Pre Submission

Save Close Print Export to Word Export to PDF Submit Withdraw

* Project Info Project Team Info * Research Ethics + Institutional Approval Attachments Approvals Logs **Errors**

Project Info ->Project Title is required.

Research Ethics + Institutional Approval -> 1: Project Description:1.1 Research Question: is required.

Research Ethics + Institutional Approval -> 1: Project Description:1.2 Research Summary: is required.

Research Ethics + Institutional Approval -> 1: Project Description:1.3 Does this research project involve organizations in addition to TBRHSC? is required.

Research Ethics + Institutional Approval -> 1: Project Description:1.5 Does this research project require research ethics review elsewhere (other than TBRHSC)? is required.

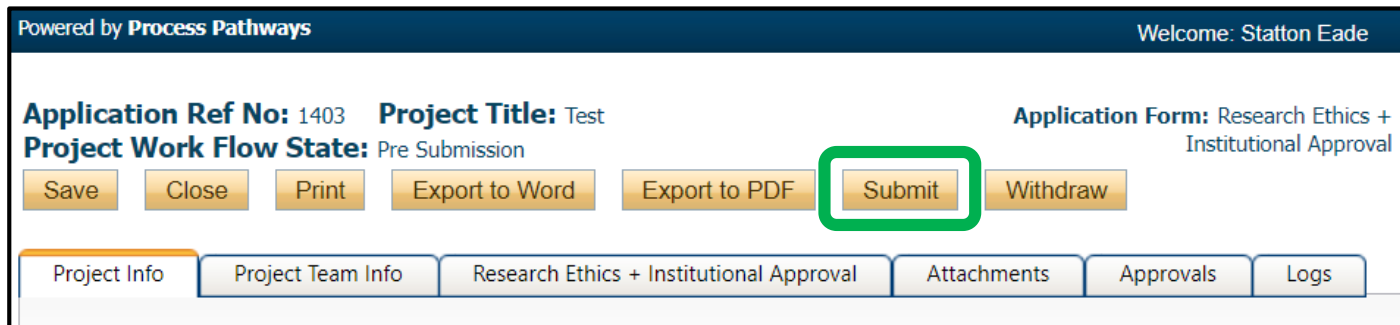
Step 5: Submitting the Application

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.



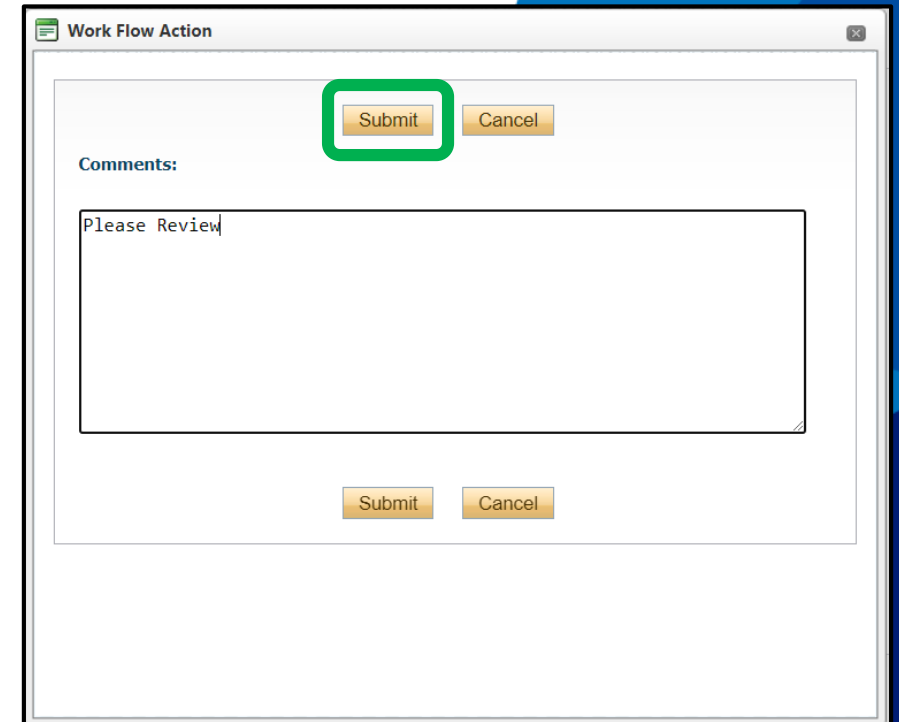
Powered by **Process Pathways** Welcome: Statton Eade

Application Ref No: 1403 **Project Title:** Test **Application Form:** Research Ethics + Institutional Approval

Project Work Flow State: Pre Submission

Save Close Print Export to Word Export to PDF **Submit** Withdraw

Project Info Project Team Info Research Ethics + Institutional Approval Attachments Approvals Logs



Work Flow Action

Submit Cancel

Comments:

Please Review

Submit Cancel

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.

The screenshot shows a web interface for an application workflow. At the top, it says "Powered by Process Pathways" and "Welcome: Statton Eade". Below this, there are fields for "File No: 100147", "Project Title: Demo Project: July 6 2022", "Project Work Flow State: ORS Review", and "Application Form: Research Ethics + Institutional Approval". There are buttons for "Close", "Print", "Export to Word", and "Export to PDF". A red message says "View mode. Changes cannot be saved." Below this is a navigation bar with tabs: "Project Info", "Project Team Info", "Research Ethics + Institutional Approval", "Attachments", "Approvals", and "Logs". The "Logs" tab is selected and highlighted with a green box. Underneath, there are radio buttons for "Application Workflow Log" (selected), "Application Log", and "Shared Communications". Below the radio buttons is a table with the following data:

Timestamp	Activity Log	Workflow State	Workflow Message	User	Role/Group
2022/07/06 10:35	New File Submitted By Researcher Project Work Flow State has been changed from Pre Submission to ORS Review	Pre Submission -> ORS Review	July 6 2022 [Action: Submit]	Statton Eade (Statton_user)	Principal Investigator

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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