

# Navigating Memorial’s Researcher Portal: Tips for HSS Applicants

For Researchers in Memorial’s Faculty of Humanities and Social Sciences who are submitting research grant applications, contracts or agreements for review and signatures through Memorial’s [ROMEO](#) (Researcher Portal) platform.

---

## Contents:

<a href="#">Tip 1:</a> Starting a New RP file.....	1
<a href="#">Tip 2:</a> Confirm your faculty and department affiliation are correct.....	2
<a href="#">Tip 3:</a> Add these mandatory “team members” to every file.....	2
<a href="#">Tip 4:</a> If a Memorial ICEHR, HREB or IACC certification has been secured for the project, link the RP file to it .....	3
<a href="#">Tip 5:</a> Select the correct funding agency and program from the RP’s database.....	3
<a href="#">Tip 6:</a> Attach all relevant documents before submitting.....	3
<a href="#">Tip 7:</a> The “All Applications” tab must be completed to submit.....	4
<a href="#">Tip 8:</a> Press “Submit” by the HSS internal deadline.....	4
<a href="#">Tip 9:</a> Quirks about the RP .....	4
<a href="#">Tip 10:</a> Opportunities that do NOT use the RP.....	5
<a href="#">Tip 11:</a> Changes or additions to existing RP files require an “event” .....	5
<a href="#">Tip 12:</a> RP support Services.....	6

---

## 1. Starting a New RP file

- Log in to the [Researcher Portal](#) using your Memorial login ID.
- On the home screen, click on “APPLY NEW” in the upper, right hand side of the screen.
- This will take you to a new screen where you should press “General Use Application”.
- Fill out the information and answer the questions in each tab. In particular, please be sure to add both HSS Grants Facilitators as “Team Members” so the Dean’s Office is able to view, review, and approve the RP file (see #3, below).

## 2. Confirm your faculty and department affiliation are accurate

- It is crucial that the first tab you check after you start a new RP file is the “Project Team Info” tab. Ensure your faculty and department affiliations are correct. This controls where the file will be routed for approvals after you press “Submit.”

- Researchers with multiple affiliations may select the appropriate one for a specific funding opportunity. If you need to make changes or updates to your affiliation, submit an [Update My Account Information](#) form.

### 3. Add these mandatory “team members” to every file (and there could be additional team members!)

- Within the “Project Team Info” tab, you MUST add several people as “team members” to every RP file you create: 1) the “Workflow Coordinator,” 2) “Heather C. O’Brien (Grants Facilitator),” and 3) “Matthew Milner (Grants Facilitator)”. For some files you may need to add other HSS or RGCS administrators (a Grants Facilitator or RGCS will inform you if this applies to your file) and/or your department’s administrative staff (check with your department). Additional team members are necessary so RGCS and HSS are able to review and approve the file prior to submission to the funding agency (most agencies require institutional signatures to submit an application).
- Here are the steps to add team members to a RP file:
  - i. Scroll to the bottom of the “Project Team Info” tab and click “Add New”.
  - ii. Click “Search Profiles” then type “Workflow” in the “Last Name” search box located within the “Investigator List.”
  - iii. Click “Search.” Within the “Options” table, press “Select” for the “RGCS Workflow Coordinator”.
    - **NOTE:** You *MUST* “Search Profiles” to add a Team Member; you *CANNOT* add anyone to your file by filling in the boxes you see in the “Project Team Member Edit” window.
  - iv. You will be taken to a window called “Project Team Member Edit.” You should now choose from the “Role in Project” drop-down menu; select “RGCS Workflow Coordinator” then press “Save” at the bottom of the screen .
  - v. Now add the next mandatory team members, “Heather C. O’Brien (Grants Facilitator)” and “Matthew Milner (Grants Facilitator)” in the same manner as above. Choose “Grant Facilitator” for “Role in Project.”
    - **NOTE:** although both HSS Grants Facilitators are added to every file, one GF will be the primary reviewer and contact for your application. The GF reviewing your file will be assigned on a workflow-basis; you will be informed as to who is handling your file.
  - vi. Lastly, add *partners* and *co-investigators* as team members (this is mandatory) and anyone else who you would like to be able to view your RP file such as collaborators, staff, departmental administrative staff, etc. Please be aware that anyone you add as a team member can view AND also edit the file but *CANNOT* submit on your behalf.
- **NOTE:** Within the “Project Team Info” tab, if you want to/need to add a team member and want them to be able to view and/or edit the file, the person *MUST* have a RP account. You may [request an account](#) be set up on their behalf, but they will have to answer a verification e-mail through their own e-mail account for it to be opened. The team member may also request an account for themselves.
- Team members listed on your application/proposal who do *not* have a RP account (such as colleagues who are external to Memorial) should be added to the “Comments” box of the “Project Team Info” tab. Collaborators can be listed here as well – they do *NOT* need to be added as team members.
- If you would like to or if you need to add team members but do not want them to be able to view or edit the file, you will have to make a request to have them added to the RP profiles database (called the Investigatory Master Record, IMR). You should submit a [help ticket](#) to request that they be added to the IMR. In the request you should include their name, affiliation, and e-mail address.

Once they are in the IMR, you will be able to add them as team members but they will not be able to view or edit the RP file.

- The RGCS Workflow Coordinator may add team members from RGCS to your file as they deem necessary, such as a Contracts Officers, Grants Coordinators, and/or administrative staff.

#### **4. If a Memorial ICEHR, HREP or IACC certification has been secured for the project, link your RP file to it**

- Memorial's ROMEO ethics files and grant application files are NOT linked. Officers is RGCS and officers in ICEHR, for example, are not able to access files across all sections of ROMEO for confidentially reasons. Therefore, you must link existing ethics application(s) to new RP files in the "Project Info" tab. To do so, follow these steps:
  - i. At the bottom of the "Project Info" tab, click "Search."
  - ii. Hit "select" on the ethics file that is related to the project you are creating the new RP file for
- For applications not yet approved by an ethics board or other types of certifications or permits, you have an opportunity to address these scenerios in sub-tab 5 of the "General Use Applications" tab.

#### **5. Select the correct funding agency and program from the RP's database**

- Within the "Project Sponsor Info" tab, it is mandatory to choose the funding agency from the agency list. Here are the steps to add the funding agency and program to your file:
  - i. Click on the "Project Sponsor Info" tab
  - ii. Click "Add New"
  - iii. Click "Agency" and then search for the funding agency's name and "Select" it
  - iv. Choose the opportunity you are applying for from the "Program" drop-down menu (Please do NOT complete/generate the "disbursement table" found at the bottom of this "Sponsor Info" window!)
  - v. Click "Save"
- If the agency or program is not listed, you will have to get it added to the RP database by submitting a ["Sponsor/Program Request Form"](#).

#### **6. Attach all relevant documents before submitting**

- Before pressing "Submit," all documents related to the opportunity's application must be uploaded to the "Attachments" tab. This includes:
  - i. A complete copy of the proposal/funding agency's application
  - ii. A copy of the budget and budget justification
  - iii. Required ethics/permits/certification approval letters (if already obtained)
  - iv. E-mails or letters that support confirmed in-kind or cash contributions (see the document: [Documenting Cash and In-kind Contributions](#) to know which types of supporting documentation are necessary for the various types of contributions)
  - v. Any other attachments as required by the funding agency's instructions
  - vi. Faculty Sign-off forms for co-applicants, if relevant
- To attach a file, click "Add Attachment" then either drag and drop the file to the "Upload Attachment" comment box, or you can browse and find the file on your computer. Click "Add Attachment".
- Note:
  - i. You *do not* have to fill out the "Description" text box or select a "doc agreement" type; these are optional but is helpful to reviewers and team members if you do complete them.

- ii. Filenames cannot exceed 128 characters or include these: " , # % & \* : < > ? / { | } ~
- iii. The maximum attachment size is 10 MB. If your file is larger, you will have to break it into parts.

## 7. The “All Applications” tab must be completed to submit

- Most of these questions are similar to the legacy “HSS Signatory Form.” All of the questions with an asterisks (\*) must be answered in order for you to be able to press “Submit”.
- Start with sub-tab #1 “\*\*\*START HERE\*\*\*”.
- If there are confirmed in-kind or cash contributions, these must be stated and the monetary value included, in sub-tab 6: Institutional Commitments and Other Resources AND the supporting documentation confirming these contributions must be uploaded to the “Attachments” tab.
- TIP: ensure the answers to all questions match the information contained in your proposal/application. If you have any questions about how to complete these sub-tabs, please contact an HSS Grants Facilitator.

## 8. Press “Submit” by the HSS internal deadline

- Pressing “Submit” is, essentially, handing-in a final, complete, application for review. You should press “Submit” by the HSS deadline, as appropriate for the opportunity (consult the [HSS Research Funding Tracker](#) for deadlines). Of note:
  - You must complete all mandatory tabs and subtabs in order to “Submit” the file. An “Errors” tab will be present until all questions have been answered; once everything has been completed in the file, the “Errors” tab will disappear and you will be able to “Submit.”
  - Before submitting, it is a good idea to check the “Logs” tab. Here, click the “Application Log” option to see the latest activity on the file. You want to ensure a team member has not made revisions to the file that you are unaware of before you submit.
  - When you press the “Submit” button, you MUST write a comment in the pop-up window in order to complete the submission. Please be aware that EVERYONE who has signing authority or who is a team member can see this comment. We recommend simply stating “Please approve” although if there are caveats or things to note regarding the file, you may add other comments.
- Pressing “Submit” locks your file from further edits and pushes it to your Department Head (they will receive an automatically-generated e-mail) who then logs in to their RP account, reviews your file, and then “Approves” it. Once the Department Head approves, the file is routed to the HSS Dean’s Office for approval. The Grants Facilitator who is handling your file will begin the HSS administrative review of the file and application. If this review generates any feedback or need for revisions, the Grants Facilitator will contact you via e-mail.
- Once the Dean’s Office approves the RP file, it is routed to RGCS for the final institutional compliance review and approval.
- If at any point an “Approver” (e.g. the Department Head, HSS Dean’s Office, or RGCS) require edits to the RP file and/or its attachments, they can return the file to the researcher thus unlocking it. The researcher makes the necessary changes and then presses “Re-submit”.
- **Note about internal deadlines:** RGCS have imposed a strict deadline policy – they will not accept RP files after [RGCS’s posted deadline](#). Therefore, HSS cannot guarantee completion of an administrative review for application files that are incomplete and/or are submitted after the HSS deadline (we need adequate time to review the RP file and application in order to submit to RGCS on time). For more detailed submission instructions and

information, please consult the [HSS Research Support Services](#) website and the [HSS Research Funding Tracker](#).

## 9. Quirks about the RP

- **Press “Save” often** (yellow button at the top left)! The RP does *not* save automatically.
- Do *not* exit by simply closing your browser – this “locks” the file from all activity. Instead, ***always exit the file by pressing the yellow “Close” button at the top of the file.***
- **RP is *not* compatible with Safari.** At all. Use Chrome instead.
- **Do *not* have multiple RP windows open** at the same time.
- Do *not* use these symbols *anywhere* in the RP file because they do not play nice with ROMEO: < >
- Be aware of space limits in text boxes. If you need more space, make a note in the text box that there is an attachment and then upload the entire response in the Attachments tab.
- You should not simply copy and paste from Word or other document programs into comment boxes in the RP. Instead, “copy” the Word document text and then right click in the RP comment box and “paste as plain text” OR, alternatively, copy and paste into “Note Pad” or a similar program, and then copy and paste that into the comment box. If you simply copy and paste, you may be carrying over invisible formatting and an error message may be triggered if the amount of text you are pasting exceeds the space limit of the text box.
- Do *not* press your browser’s “back” button – instead, navigate within the RP.

## 10. Opportunities that do *not* use the RP

- There are several Memorial, internal opportunities that currently do not get submitted through the RP and do not require an HSS administrative review or Dean’s Office signature prior to submission. These grants, however, *do* require an RP file be completed if you are awarded (this is so that an account can be opened to receive the funds). These include:
  - ISER Research Grants
  - Smallwood Research Grants
- Other internal Memorial opportunities do not go through the RP but require a Dean’s Office signature. For these, you will have to complete an HSS Signatory Form which asks the same questions as in the RP. You can obtain a form from an HSS Grants Facilitator. For these opportunities, there is an HSS internal deadline to ensure adequate time to complete an HSS administrative review and to obtain necessary signatures. Once the review is complete and you have all necessary signatures, you must submit your proposal directly to the funding unit either through their portal or by e-mail (consult the opportunity’s deadlines). These opportunities include:
  - Harris Centre research grants
  - Public Engagement grants
  - VPR Conference Fund
  - VPA Cross-Campus Initiatives Fund
  - Ocean Frontier Institute Vitamin Research Fund
  - Salary-Based Research Grants Program
  - Aging Research Centre Research Grants

## 11. Changes or additions to existing RP files require an “Event”

- Any post-review activities, such as: a request for transferring funds to an external team member’s institution; adding agreements or contracts; an amendment to the file, which might include a project team change (addition or deletion), a time frame extension, budgetary changes, or scope of work changes; etc., can be submitted using an Event.
- Anyone listed on the original RP file as a team member can submit an Event.

- If you would like to add a team member to an RP file, this request must be submitted by an existing team member as an event.
- To launch an Event against one of your RP files, you should:
  - i. Find the original RP file that you want to launch the Event against.
    - TIP: if you know the eight-digit RP file number, you can search for it from the home screen.
    - Otherwise, you can browse your RP account to find it. Depending on your role in the project, it could be located in either the block “Role: Principal Investigator” or “Role: project Team Member.”
    - Depending on whether the grant has been awarded or not, in each block you may find the file under “Applications: Under Review” or “Applications: Post-Review.”
  - ii. Hit the yellow “Events” button.
    - Note: if there is no Events button present, contact an HSS Grants Facilitator. They can request that RGCS make the file “eventable” for you.
  - iii. In the new “Create New Event” window, choose which event type best fits what you want to convey to RGCS; there are descriptions listed beside each event type. The options are:
    - RGCS-Agreement
    - RGCS-Amendment
    - RGCS-Request to Transfer Funds to External Team Member’s Institution
    - RGCS- Other Documents
    - RGCS-Certification Verification
  - iv. Complete the tabs in the Event, upload the necessary documents, and hit “Submit”.
- When you press “Submit”, the Event will go directly to RGCS, bypassing Department Heads and the Assoc. Dean; therefore, if relevant, obtain necessary department and/or faculty approvals and upload them as attachments before pressing “Submit” in the event. These could be copies of e-mails or official letters, for example.

## 12. RP support Services

- RGCS has several on-going support services available for the Researcher Portal:
  - General information: <https://rpresources.mun.ca/awards/>
  - FAQs: <https://rpresources.mun.ca/help-2/faq/>
  - Training sessions (either online or in-person): <https://rpresources.mun.ca/training-session-calendar/>
  - Training manual (created by RGCS) for creating a new RP file: <https://rpresources.mun.ca/wp-content/uploads/2018/10/25.10.2018-Creating-a-New-Application-RGCS.pdf>
  - Post-award training manual (created by RGCS): <https://rpresources.mun.ca/wp-content/uploads/2017/12/24.11.2017-Creating-and-Managing-Events.pdf>
  - Training videos (created by RGCS): <https://rpresources.mun.ca/human-ethics/videos/>
  - Request a Memorial Researcher Portal account: <https://rpresources.mun.ca/request-romeo-account/>
  - Update my Account Information: <https://rpresources.mun.ca/request-romeo-account/update-research-portal-account/>
  - Submit a help ticket: <https://rpresources.mun.ca/help-2/help/>
  - Sponsor/Program Request Form: <https://rpresources.mun.ca/sponsor-program-request-form/>
  - Email RP support: [RPsupport@mun.ca](mailto:RPsupport@mun.ca)
  - Phone RP support: 864-3771

- HSS can also offer support through its Grants Facilitators:
  - Heather C. O’Brien: [HSSResearchAdmin@mun.ca](mailto:HSSResearchAdmin@mun.ca), 864-8603
  - Matthew Milner: [HSSResearchGrants@mun.ca](mailto:HSSResearchGrants@mun.ca), 864-8050

## Other Useful Links

Links to useful information:	URL
HSS Research Support Services website	<a href="https://www.mun.ca/hss/research/information/">https://www.mun.ca/hss/research/information/</a>
HSS Research Opportunities Database	<a href="https://www.hss.mun.ca/funding/dashboard">https://www.hss.mun.ca/funding/dashboard</a>
Guidelines for cash and in-kind contributions	<a href="https://www.mun.ca/hss/research/information/documents/FAQ_cash_in-kind_2018-09-18.pdf">https://www.mun.ca/hss/research/information/documents/FAQ_cash_in-kind_2018-09-18.pdf</a>
RGCS Research Project Management	<a href="https://research-tools.mun.ca/rpm/">https://research-tools.mun.ca/rpm/</a>
Memorial’s Human ethics	<a href="https://rresources.mun.ca/human-ethics/">https://rresources.mun.ca/human-ethics/</a>
Memorial’s Animal care	<a href="https://rresources.mun.ca/animal-care/">https://rresources.mun.ca/animal-care/</a>
RGCS pre-award services	<a href="https://research-tools.mun.ca/rgcs/rgcs/">https://research-tools.mun.ca/rgcs/rgcs/</a>