

## REB Guide for Applying for Release of Funds using ROMEO

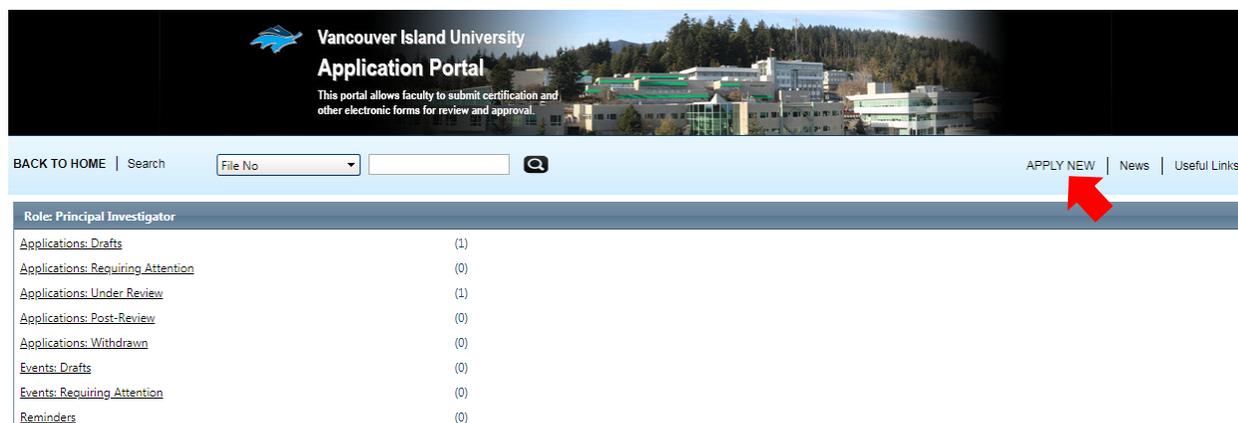
VIU withholds funding for research involving human participants until such time as Research Ethics Board (REB) approval has been granted. In some circumstances REB approval may not be possible until several months after the date of award. The Application for Release of Funds form enables researchers to request access to funding for activities not involving human participants prior to obtaining REB approval.

### Follow these steps to apply for release of funds prior to ethical review:

#### 1. Login to the Romeo Researcher Portal

Login to the Romeo Researcher Portal using your email address and ROMEO password. If you are a first time user of ROMEO, please refer to the [Registration section of VIU's ROMEO webpage](#) for information on how to register for a ROMEO account.

#### 2. On the Home Screen, click on "APPLY NEW."



Vancouver Island University  
Application Portal  
This portal allows faculty to submit certification and other electronic forms for review and approval.

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

Role: Principal Investigator

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Applications: Withdrawn	(0)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

#### 3. In the "Human Ethics" section, select "REB Application for Release of Funds."

##### Human Ethics

Application Name	Description	Status
<a href="#">REB Application for Exemption from REB Review</a>	Submit this form if you are unsure whether your project requires REB approval, or if an REB decision is required to facilitate release of funds.	Open
<a href="#">REB Application for Ethical Review</a>	Application for Ethical Review Form for Research Involving Human Participants	Open
<a href="#">REB Application for Release of Funds</a>	The purpose of this form is to enable researchers to request access to funding prior to obtaining Research Ethics Board (REB) approval.	Open

#### 4. Enter Project Information, including Project Title, Start and End dates.

Note that the "Start Date" and "End date" refer to the period during which you would like access to funding funding to support activities not involving human participants. Upon approval, the REB will adjust these dates to correspond to the date of approval. Approval of release of fund is typically valid for six month or less.

Application Ref No: 3972

Save Close Print Export to Word Export to PDF Submit Withdraw

\* Project Info | Project Team Info | \* REB Application for Release of Funds | Attachments | Approvals | Logs | Errors

Title \*: 

Start Date:  

End Date:  

Keywords:  

### 5. Add "Related Awards".

To add the VIU-administered award you are applying to access, scroll to the bottom of the "Project Infor" tab, click on the "Search" button, and select the award from the list.

**Related Awards**

If you are a student, please ignore this section and continue to the next tab.  
If you are a non-student ( e.g faculty, staff) and have applied for, or have been awarded, research funding, click 'Search' to locate and attach the related research funding. If the related research funding is not found please ignore this section and continue to the next tab.



Award File No	Title	Award Status	PI Last Name	PI First Name	Sponsors Summary	Notes
No records to display.						

### 6. Complete the Project Team tab and include all team members that are expected to be involved in the project.

To add project members:

- a) Scroll to the bottom the "project Team Info" tab
- b) In the "Other Project Member Info:" area, click on the "Add New" button

**Other Project Member Info:**  
Do not hand type data for this section. To add more project team members to this application form, click Add New to search for and select from other researcher profiles. Click [?] for more info.

	Last Name	First Name	Role In Project
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Investigator1	Test	Graduate Student Researcher

- c) Click on the "Search Profiles" and search for the registered user you would like to add.

## Project Team Member Info

Do not hand type data for this section. To add more project team members to this application form, click Add New to search for and select from other researcher profiles. Click [?] for more info.





Search for a team member by entering her/his or last name at the top of the screen and clicking on the “Search” button

Instructions : Search for and select the researcher profile you want to load to this application file. If the project team member does not have a researcher profile, contact your system administrator for guidance.

Start With  Any part

Last Name:

First Name:



**IMPORTANT:** Always use the “Search Profiles” function to add Project Team Members information. If an investigator is added to the database twice, the system will have problems properly managing communications.

d) In the “Role in Project” field, select the appropriate “Roll in Project” value, such as “Student”, or “Supervisor.”

Prefix:  Last Name:  First Name:

Affiliation:

Role In Project:  Country:

Position:  Institution:

Email:  Fax:

Phone1:  Phone2:

Primary Address:  Mailing Alternate Address:

Use Of Address:

Comments:

Role In Project dropdown menu items:

- Supervisor
- Co-Investigator
- Co-Investigator - External
- Co-Supervisor
- Emergency personnel
- External Principal Investigator
- Graduate Student
- Researcher
- Research Assistant
- Research Coordinator
- Research Staff
- Supervisor
- Technician
- Undergrad Student
- Researcher

If you are a student researcher, please designate yourself as the “Principal Investigator,” and identify your faculty supervisor as “Supervisor.”

**7. Click on the “REB Application for Release of Funds” Tab and complete questions.**

Application Ref No: 3972 Project Title: Application Form: REB Application  
Project Work Flow State: Pre-Submission

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\* Project Info Project Team Info \* REB Application for Release of Funds Attachments Approvals Logs Errors

\* Application for Release of Funds

Please attach to this application any documents that may assist the REB to assess proposed activities prior to ethical review.

1.1) \* Anticipated Date of Submission of Application for Ethical Review

1.2) \* Why is an Application for Ethical Review not yet ready to be submitted to the REB?

**8. On the “Attachments” tab, include documents that may assist the REB in assessing your application.**

Application Ref No: 3972 Project Title:  
Project Work Flow State: Pre-Submission

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Add Attachment

NOTE : The maximum individual attachment size is 5MB. All attachments larger than 5MB will stall the system, and your data may be lost. However, you may upload multiple attachments, provided that each is no larger than 5MB.

**9. The “Errors” tab indicates fields that need to be completed before the application can be successfully submitted.**

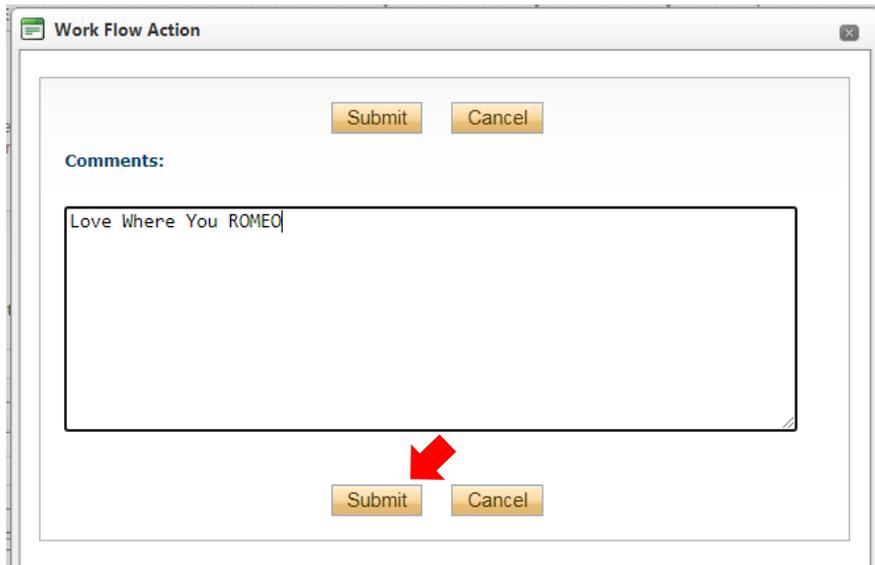
The Errors tab will disappear once all required fields have been completed, after which the application can be submitted.

Application Ref No: 1094

Save Close Print Export to Word Export to PDF Submit Withdraw

\* Project Info Project Team Info \* REB Application for Ethical Review Attachments Approvals Logs Errors

**10. Once you have completed all required information, submit your application by clicking on the “Submit” button.**



The image shows a screenshot of a software dialog box titled "Work Flow Action". At the top, there are two buttons labeled "Submit" and "Cancel". Below these is a section labeled "Comments:" followed by a large text input area. The text "Love Where You ROMEO" is entered into this field. At the bottom of the dialog, there are two more buttons labeled "Submit" and "Cancel". A red arrow points to the bottom "Submit" button.

**NOTE:** When you click the “Submit” button, a “Comments” box will appear. You must type something (anything) in this box to proceed with submission.

Once your application has been submitted, you will receive an automated email confirming that your application has been received and is under REB review.

Please contact the REB at [reb@viu.ca](mailto:reb@viu.ca) if you have questions.