



## **ORIS ROMEO RPI**



Login to the portal through the appropriate link.

1. [Internal User \(Dalhousie NetID\)](#)
2. [External User](#)

On the right side of the homepage, click Apply New.

Select the protocol form.



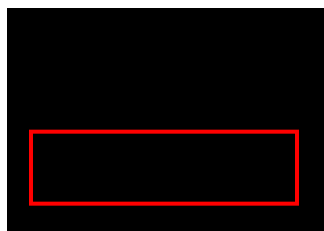
Investigator details are automatically populated under the **PI** tab. By default, whoever starts the application is listed as the Principal Investigator. If the person is not actually the PI, they can still complete the protocol form, but the PI must be the one to click Submit, as the equivalent of their electronic signature. [Click here for instructions on how to change the PI.](#)

The screenshot shows the 'Principal Investigator' section of a web application. At the top, there are tabs for 'Affiliation', 'Project Info', 'PI', 'Project Team', 'Form A: Animal Care Research Protocol Form', and 'Animal Use'. The 'PI' tab is active. Below the tabs, the text 'Principal Investigator (PI) section default populates with the research Instructions : Do not hand type data for this section. The F' is visible. There are two buttons: 'Change PI' and 'Default'. Below these, there is a dropdown menu for 'Affiliation\*' with the value 'VP, Research (Dalhousie)\Office of Research Services'. Below that, there is a dropdown menu for 'Institution' with the value 'Dalhousie University'. There is also a dropdown menu for 'Position' with the value 'Research Staff'.

To add project team members, scroll to the bottom of the Project Team Info tab and click Add New.

The screenshot shows the 'Other Project Member Info' section of a web application. The text 'do not hand type data for this se' is visible. There is a button labeled 'Add New' highlighted with a red box.

Click Search Profiles.





The custom form tab will produce a number of sub-tabs, with questions related to the protocol.

The **Abb** is where the Purpose of Animal Use and Category of Inv~~er~~14-2. (n4(s w)1-2. (g( an)2(v14( an)2e)1. (s) Tw 60









Search for PI's name in the white boxes. If nothing appears, try the first or last name separately (name might include hyphens, initials, etc.)

Select the PI's name.

In order to save their work, and still have access to the file, the delegate needs to add themselves back in as a Project Team Member (scroll to the bottom of the Project Team Info tab).

Click Add New.

Click Search Profiles to look up and select their name.

Save and close out of the file. When the application is ready to be submitted, inform the PI so that they can login to ROMEO and click the Submit button.