



## **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.](#)

Principal Investigator (PI) section default populates with the research Instructions : Do not hand type data for this section. The F

Affiliation\*: VP, Research (Dalhousie)\Office of Research Services

Position: Research Staff, Research Staff

Institution: Dalhousie University

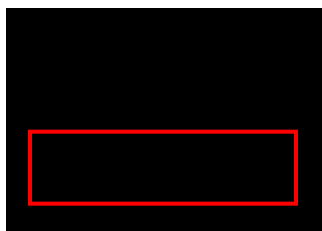
To add project team members, scroll to the bottom of the Project Team Info tab and click Add New.

Other Project Member Info

do not hand type data for this section

Add New

Click Search Profiles.





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

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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.