Queen's ROMEO e-System

Applying for Human Ethics Certification

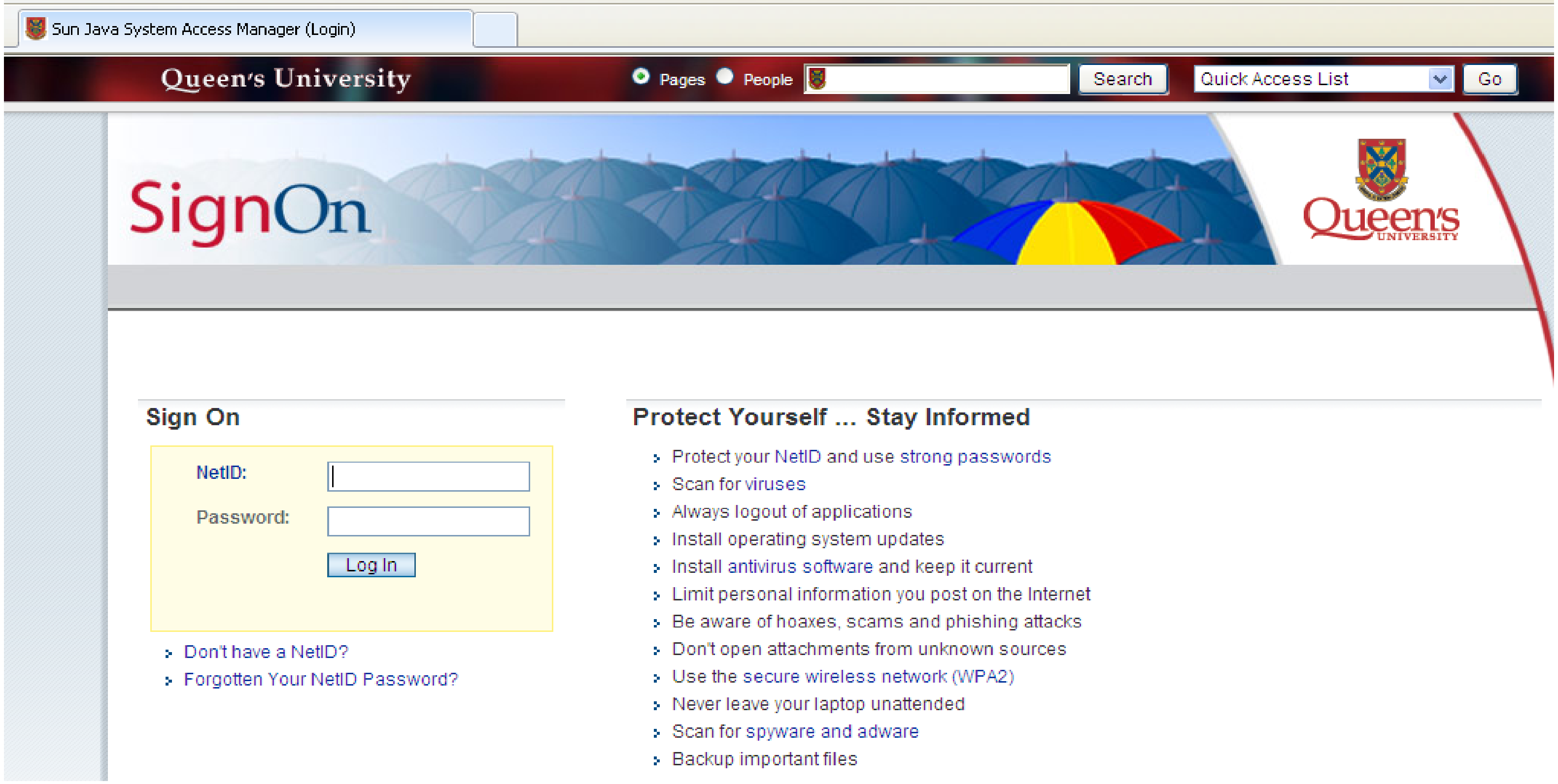
Health Sciences and General Ethics Research Boards (HSREB & GREB)

Research Coordinator's User Manual

January 2013

Accessing the Researcher's Portal

The Researcher's Portal is available through the Single SignOn at the following URL: https://eservices.queensu.ca/romeo_researcher/ or through the Office of Research Services website:
http://www.queensu.ca/ors/researchethics/queensethicsromeo/registrationlogin.html



- Queen's faculty and staff should use their regular Queen's NetID and strong* password to log into the Researcher's Portal through the Single SignOn.

- Queen's students and external users, trying to log in for the **first time**, will need to complete the Self Registration Form before they can access the Researcher's Portal. Once you have registered, you will receive an automatic email with instructions on setting up your own password. From then on, you will access the Researcher's Portal through the Post-Registration Login Site.

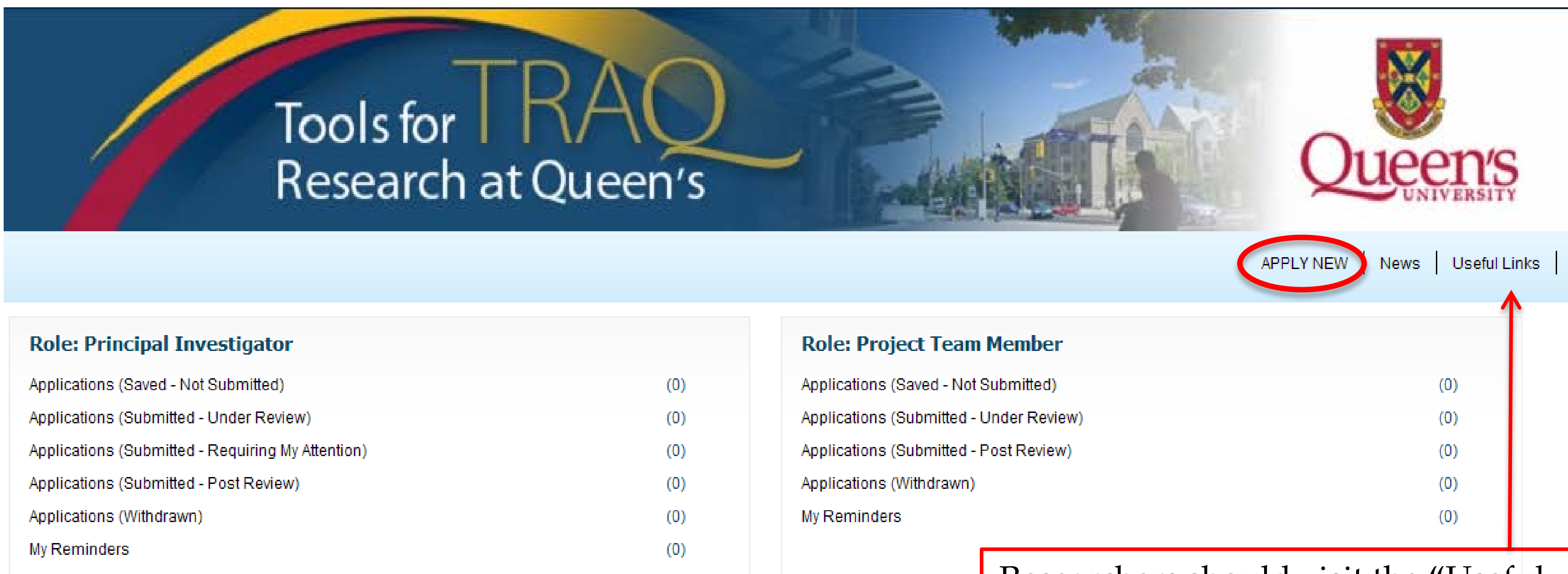
- For more details regarding access to ROMEO Ethics, please visit the ORS website: http://www.queensu.ca/ors/researchethics/queensethicsromeo/registrationlogin.html

- All users should know how to safeguard their electronics (computers, smartphones, etc.) and be familiar with the Queen's University Computer User Code of Ethics as well as the *Freedom of Information and Protection of Privacy Act* (FIPPA) at Queen's.

**Information regarding managing your Queen's NetID and the strong password is available on the ITS website.*

Researcher’s Home Page

You are now in the Researcher’s Home Page! To access the GREB and HSREB application forms, click on “APPLY NEW”



Researchers should visit the “Useful Links” section every now and then for helpful tips and hints!

Select Proper Ethics Form

APPLY NEW | News | Useful Links | Settings

Any research project involving human participants, **whether funded or not**, must receive ethics approval of one of the Ethics Boards prior to the start of the project.

- Non-Health Sciences (Social Sciences) submit to the General Research Ethics Board (GREB)
- Health Sciences and affiliated teaching hospitals submit to Health Sciences Research Ethics Board (HSREB)

New Application Forms

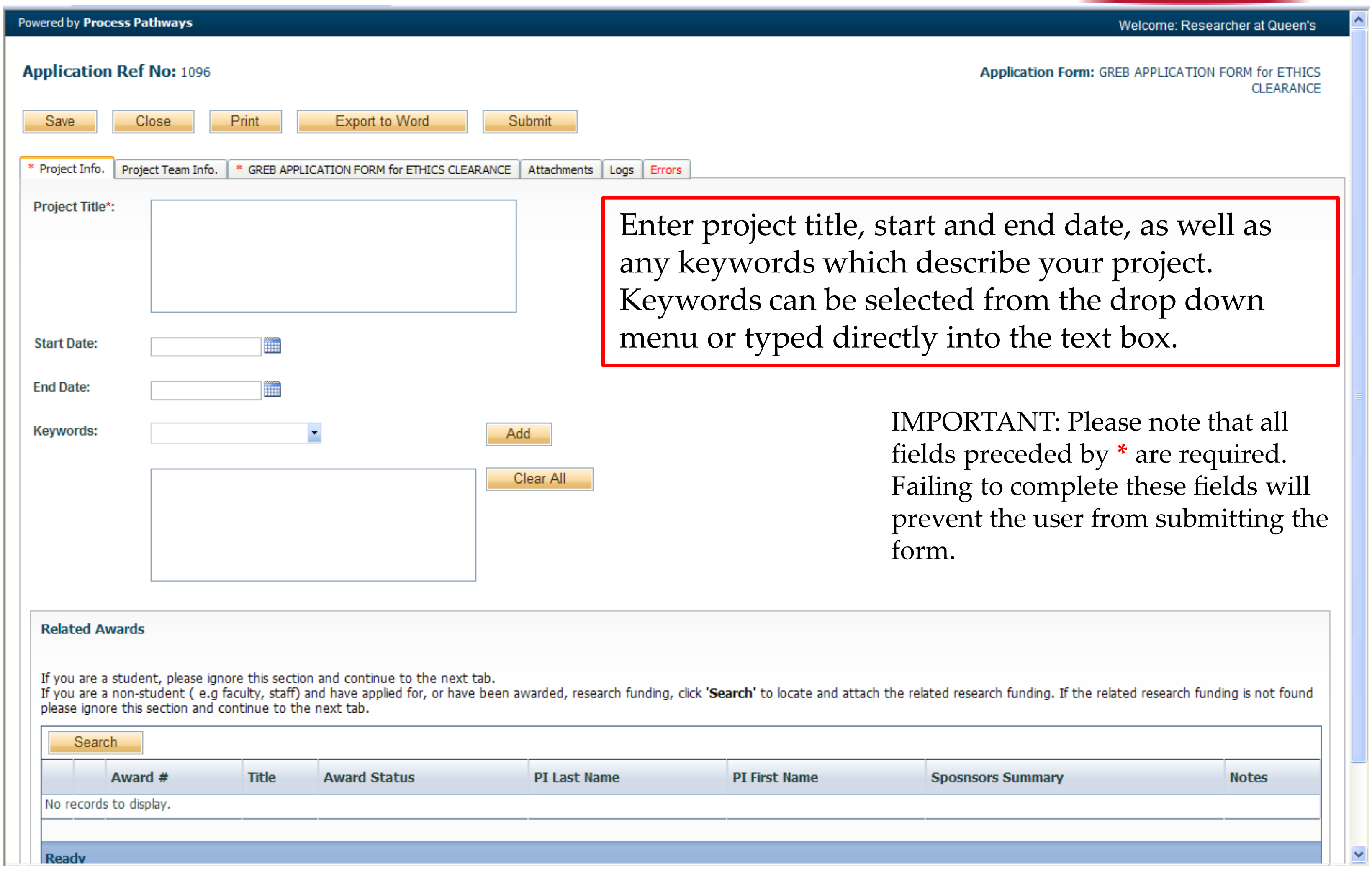
GREB

Application Name	Description	Status
GENERAL RESEARCH ETHICS BOARD APPLICATION FORM for ETHICS CLEARANCE (Social Sciences)	New updated form - November 2012	Open

HSREB

Application Name	Description	Status
HEALTH SCIENCES RESEARCH ETHICS BOARD APPLICATION FORM for ETHICS CLEARANCE	HSREB form - updated November 2012	Open
Health Sciences Research Ethics Board Short Form for Critical Enquiry, Chart reviews, Questionnaires, Surveys	To be used for: chart review, critical enquiry etc.	Open

Project Info Tab

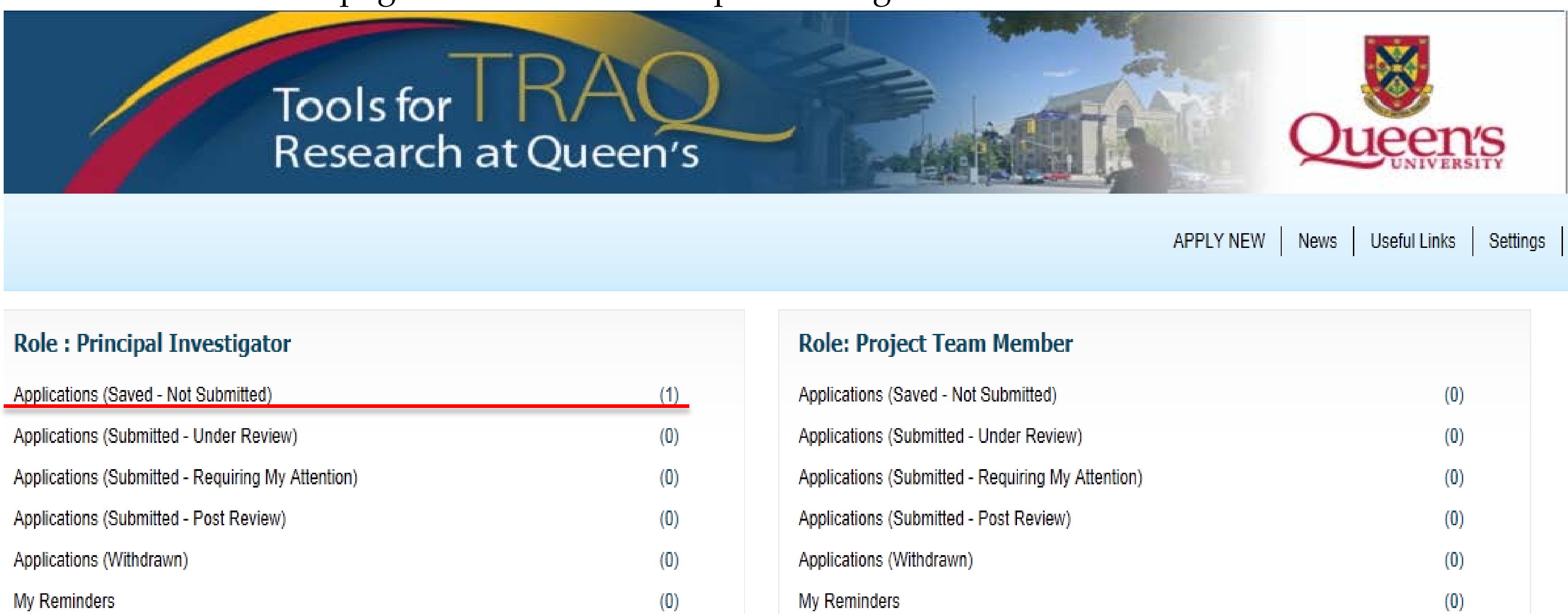


Enter project title, start and end date, as well as any keywords which describe your project. Keywords can be selected from the drop down menu or typed directly into the text box.

IMPORTANT: Please note that all fields preceded by * are required. Failing to complete these fields will prevent the user from submitting the form.

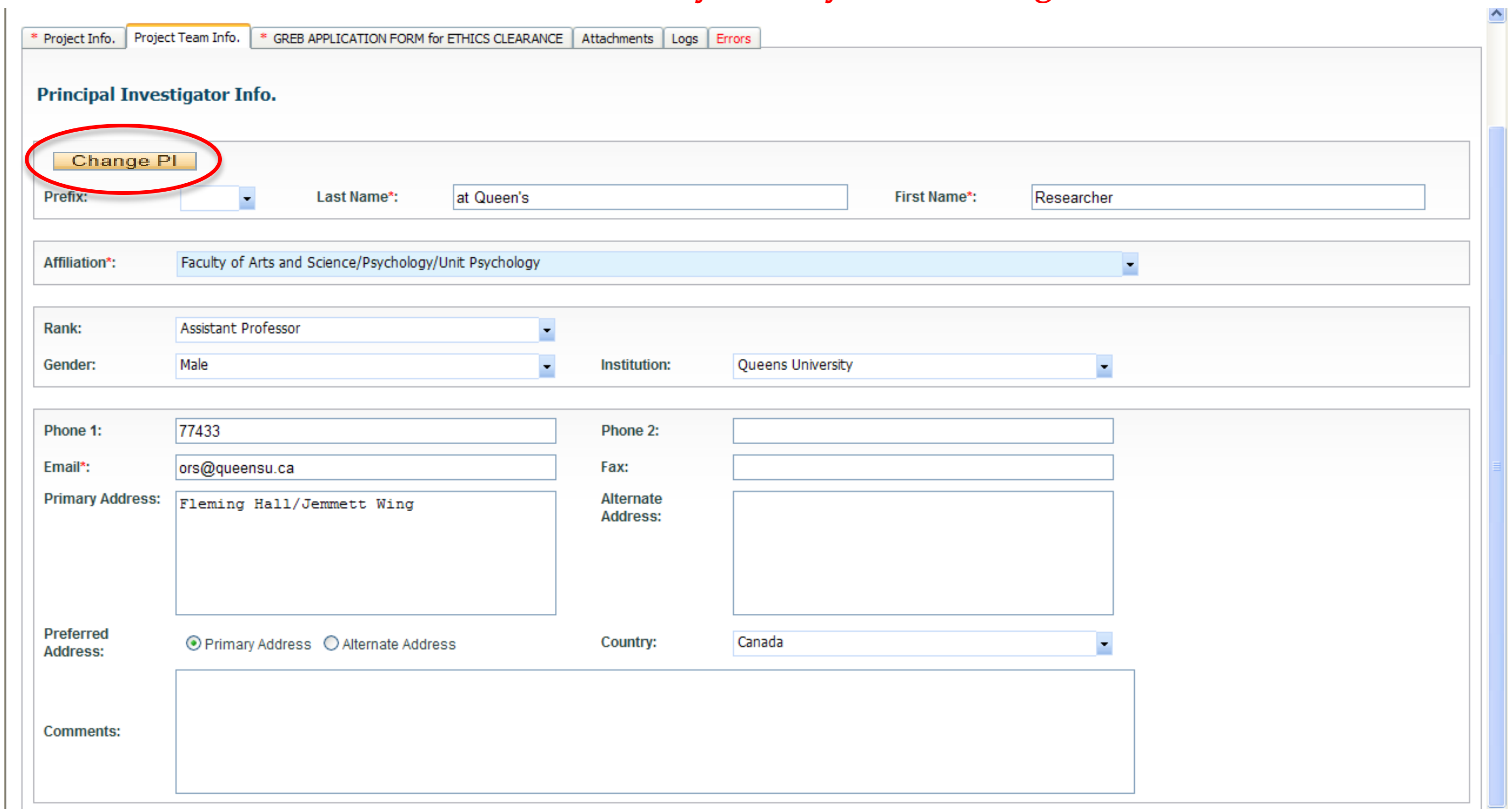
P.I. Role versus Project Team Member Role

- At this point, the applicant (person completing application on behalf of the P.I.) will automatically be designated as P.I. on the application.
- The role of the applicant from P.I. to Project Team Member will need to be modified to ensure the application will follow the proper process. This can be done at any point during the completion of the form.
- As long as the applicant remains P.I. the application will continue to be accessible from the Researcher's home page under "Role: Principal Investigator".



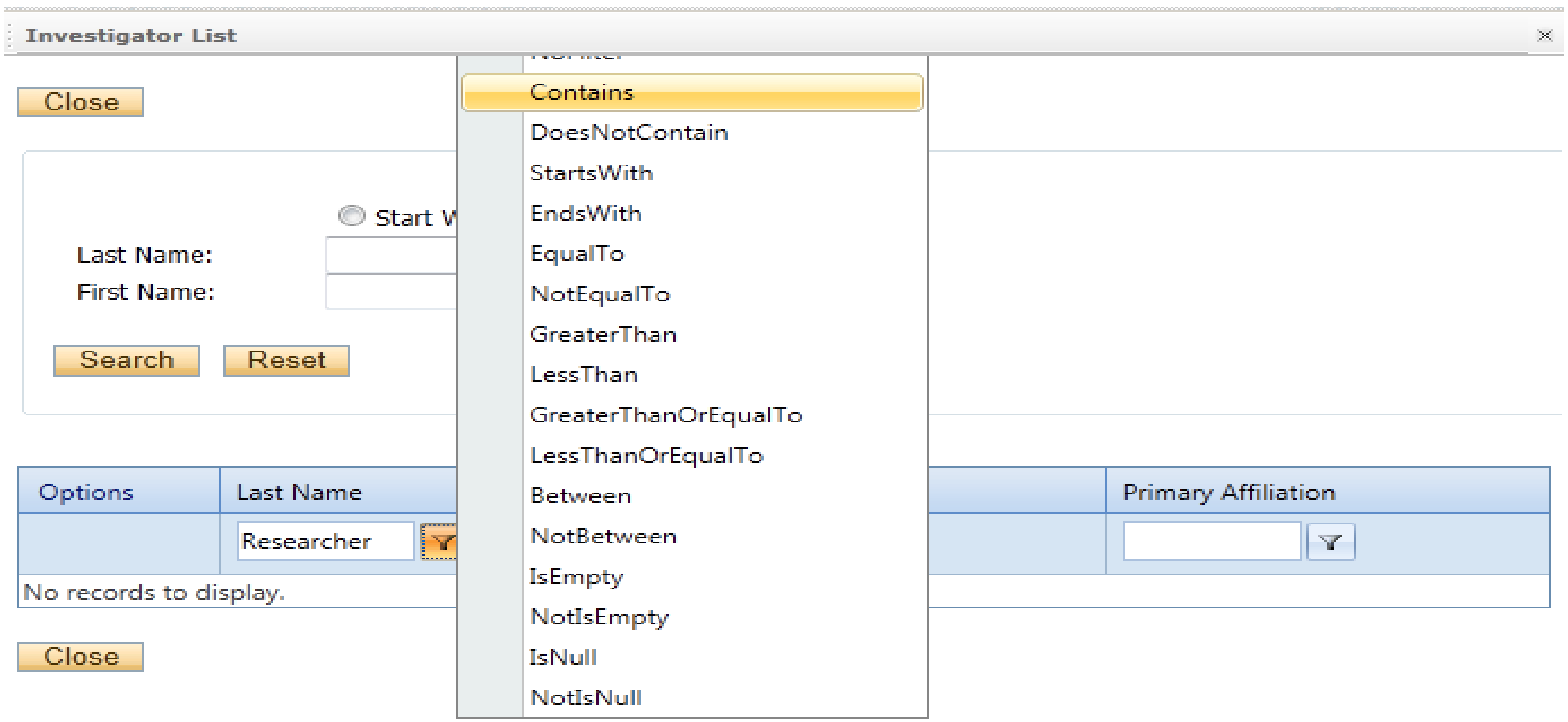
Project Team Info Tab

- Project Team Info tab is automatically filled out with applicant's info. To change the role of P.I. over to another researcher, click on "Change PI". **Important: DO NOT change P.I.'s "Last Name" and "First Name" manually – always use "Change PI" feature.**



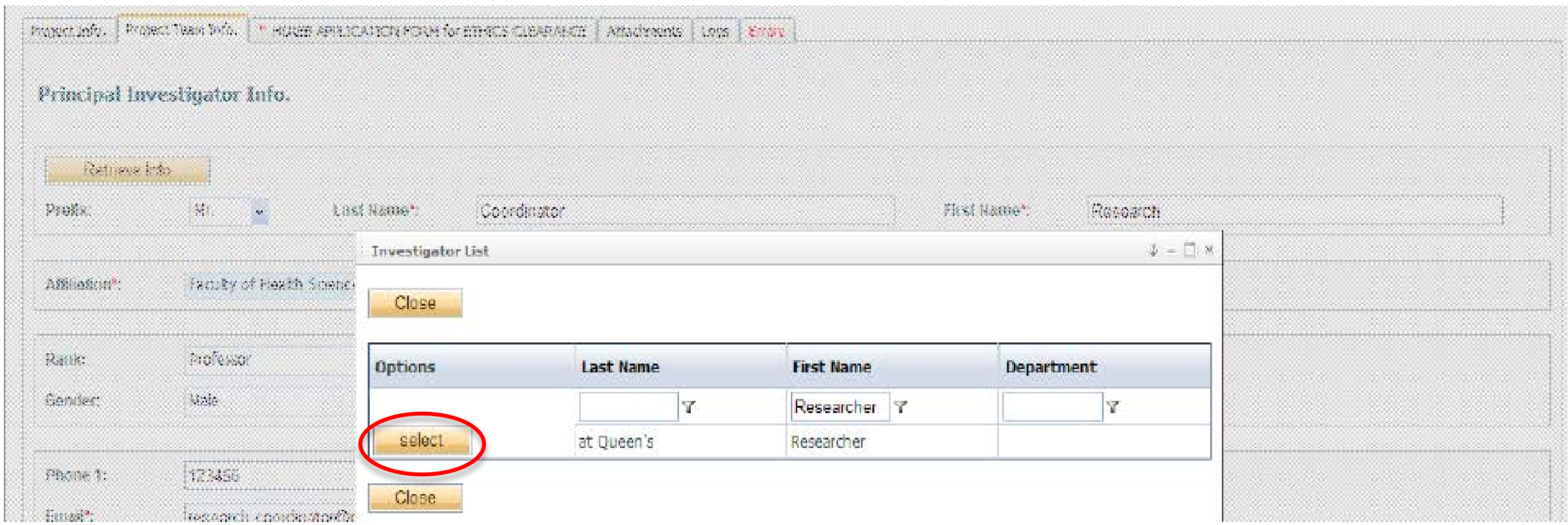
Transferring P.I. Role to Another Researche

- Once you click “Change PI”, you can search the Investigator List for the name of the person to be assigned as P.I. The list can be searched in a variety of ways, i.e. type the last name of the person in the “Last Name” field, use the filter beside it to select a search criteria such as “EqualTo” or “Contains”.



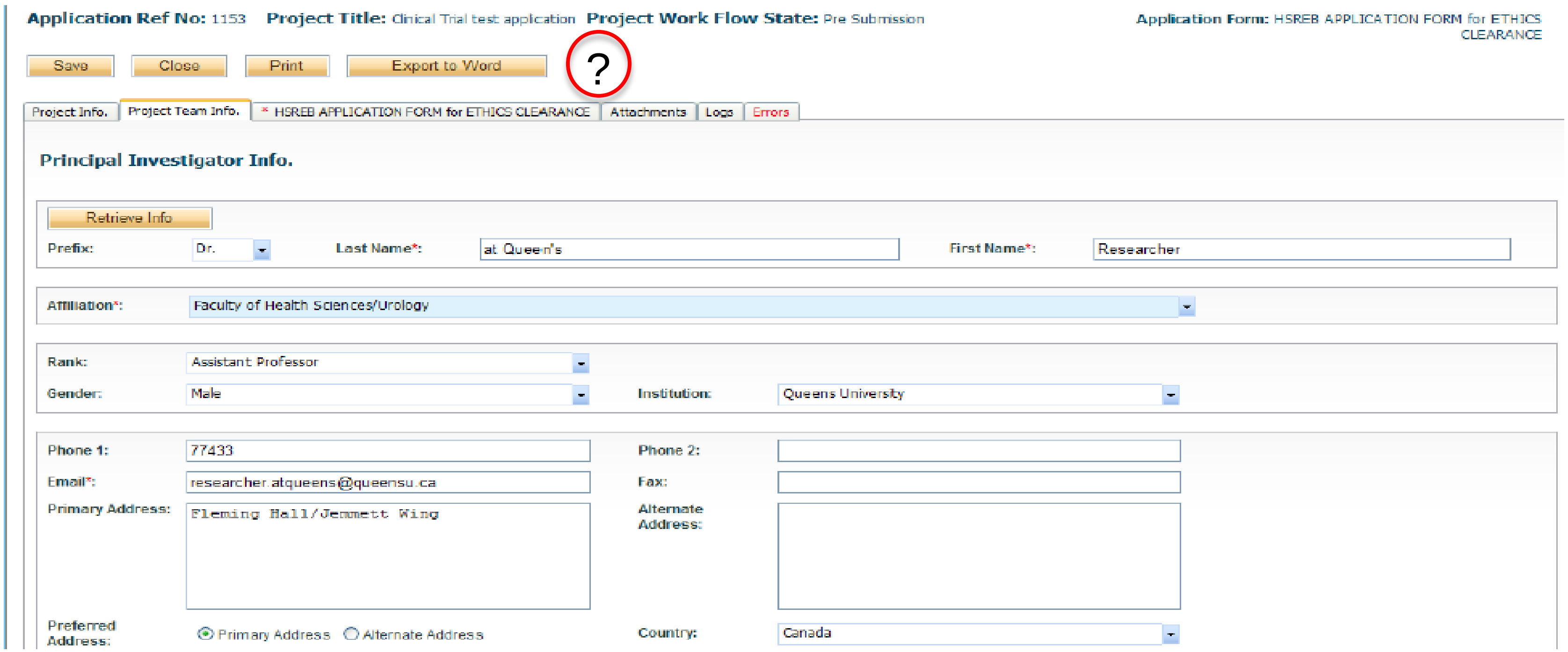
Transferring P.I. Role to Another Researcher

- Once you've identified your P.I. – click on "select".



- If you are unable to identify the person you are looking for from the investigators list, please email the TRAQ Helpdesk (traq@queensu.ca). Your email should include the person's full name, title, business address and email address. You will be notified as soon as the person has been added to the investigators list and will then be able to transfer the P.I. role over to them.

- Project Team Info will automatically be updated with P.I.'s information.
- At this point, you will also notice that the "Submit" button, previously located at the top of the form, has disappeared.
- Important: the next step is to add yourself to the application as a team member. <u>This must be done before you close the application.</u> Failing to do so will result in you losing access to the application.



Application Ref No: 1153 **Project Title:** Clinical Trial test application **Project Work Flow State:** Pre Submission **Application Form:** HSREB APPLICATION FORM for ETHICS CLEARANCE

Save | Close | Print | Export to Word | ?

Project Info. | Project Team Info. | * HSREB APPLICATION FORM for ETHICS CLEARANCE | Attachments | Logs | Errors

Principal Investigator Info.

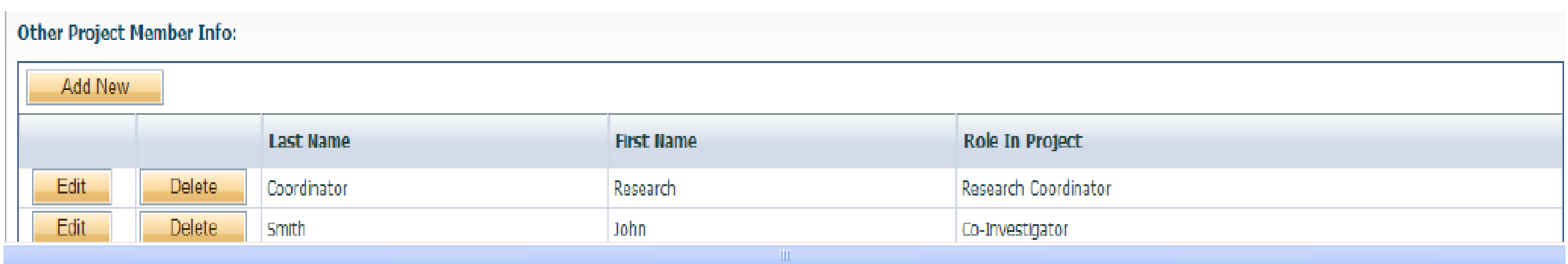
Retrieve Info

Prefix:	Dr.	Last Name*:	at Queen's	First Name*:	Researcher
Affiliation*:	Faculty of Health Sciences/Urology				
Rank:	Assistant Professor				
Gender:	Male	Institution:	Queens University		
Phone 1:	77433	Phone 2:			
Email*:	researcher.atqueens@queensu.ca	Fax:			
Primary Address:	Fleming Hall/Jemmett Wing	Alternate Address:			
Preferred Address:	Primary Address / Alternate Address	Country:	Canada		

Adding Team Members

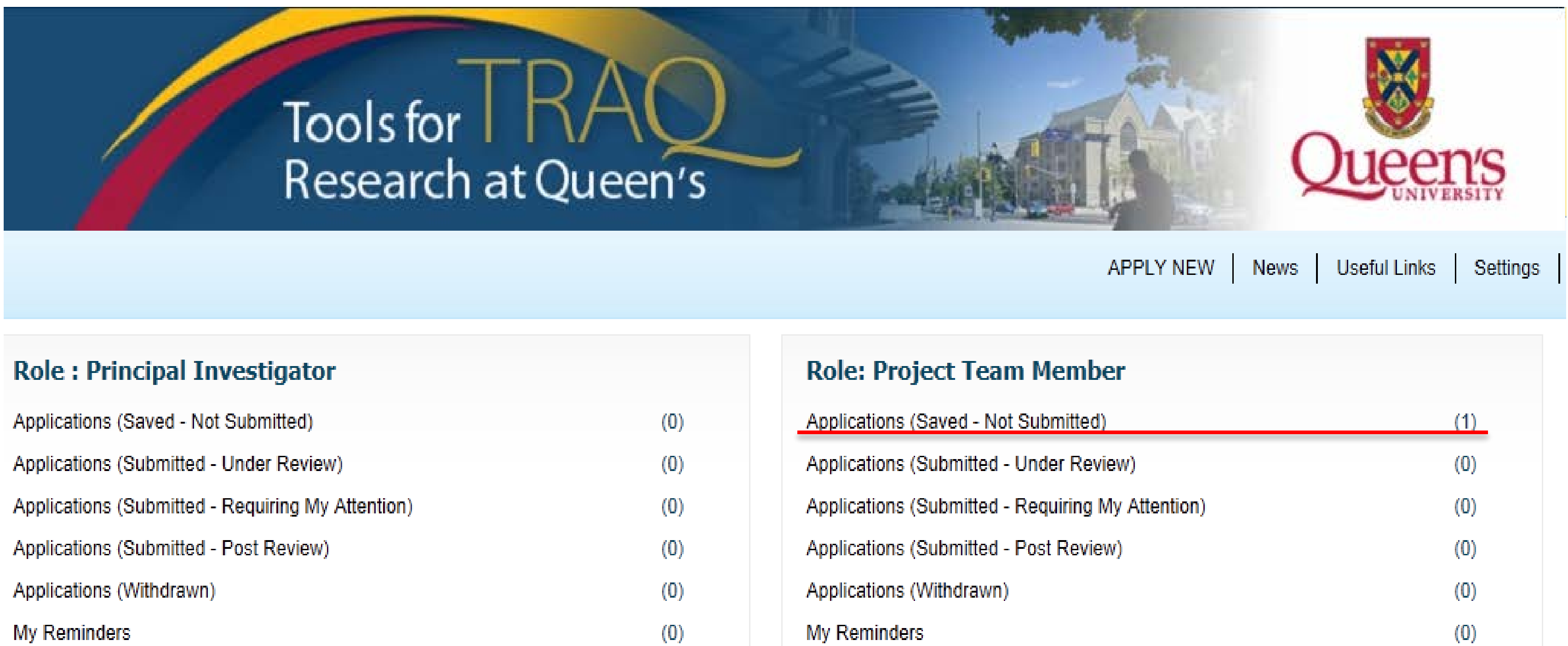
- Scroll down to “Other Project Member Info” on the Project Team Info tab - click “Add New” > “Add/Edit” and repeat the search process, this time assigning yourself to the team and selecting your role in the study from the drop down menu under “Role In Project” data field.

- Applicants may add as many team members as required by clicking “Add New”, team member information can be edited or deleted as required. Again, please contact the TRAQ Helpdesk by email if you are unable to locate the team member in the investigators list.



P.I. Role versus Project Team Member Role

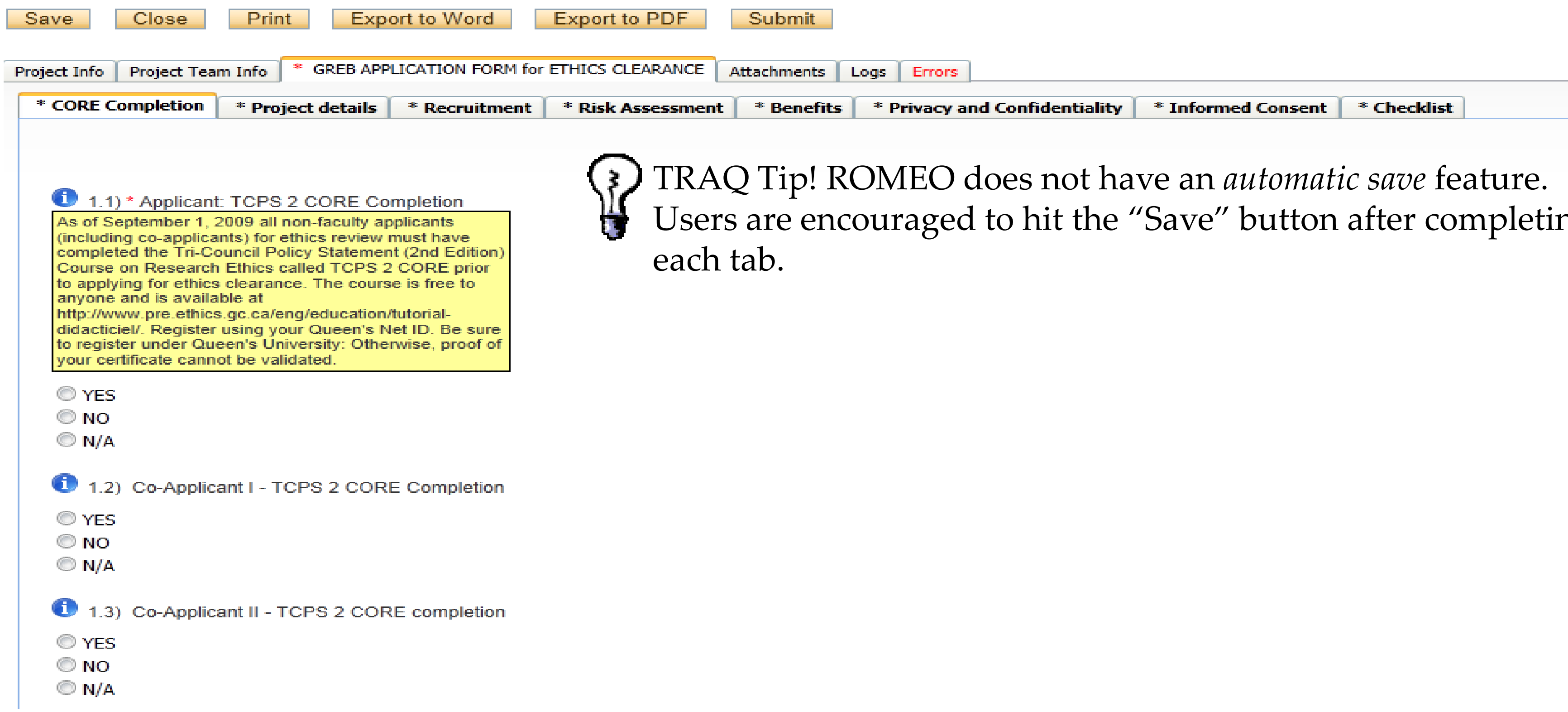
- Once the change has been made on the "Project Team Info" tab, the application will be accessible to the Research Coordinator and to the other team members from the Researcher's Home Page under "Role: Project Team Member".
- The P.I. is the only person who can submit the application once it has been completed by the Research Coordinator.



Ethics Clearance Tab

(GREB applicants only, HSREB applicants choose HSREB form)

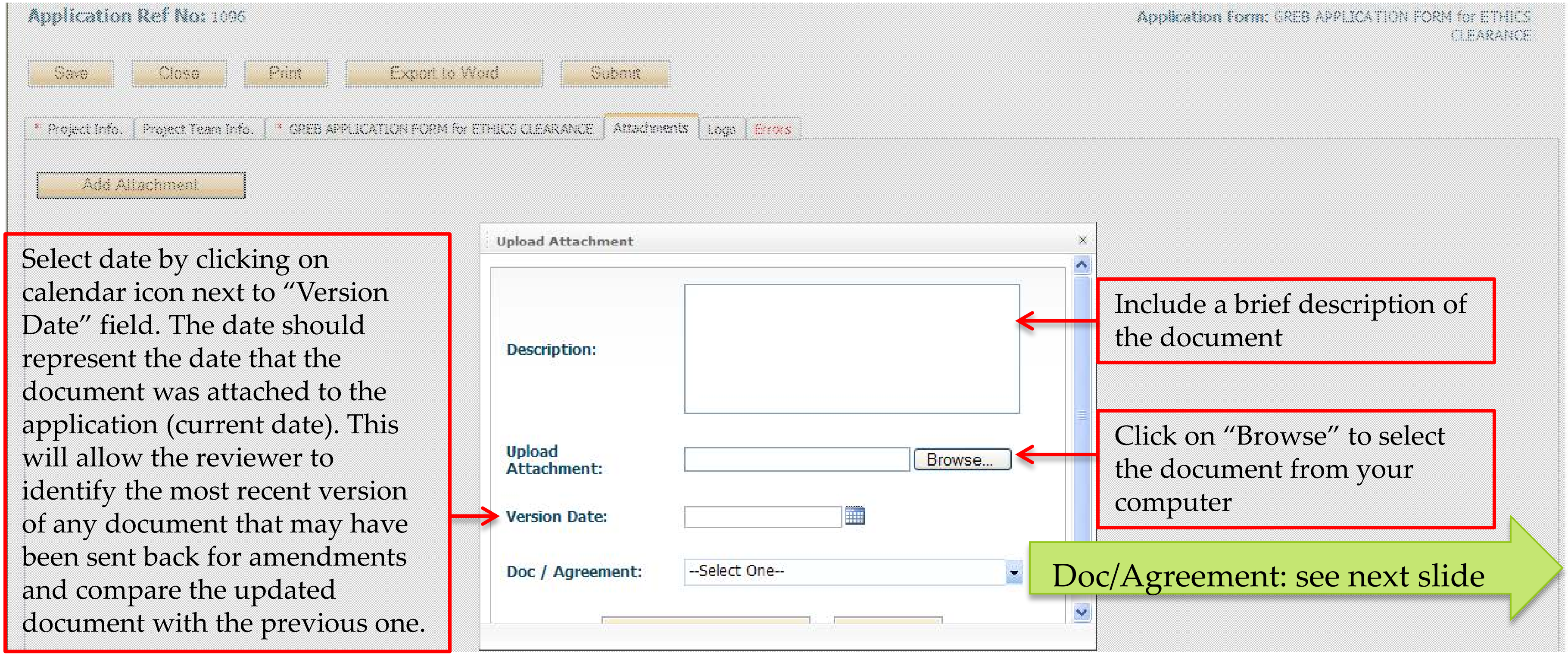
- The Ethics Form tab has several sub-tabs all of which contain required questions. If you are unsure how to answer a question, try clicking on additional information may be available as seen in the screenshot below!



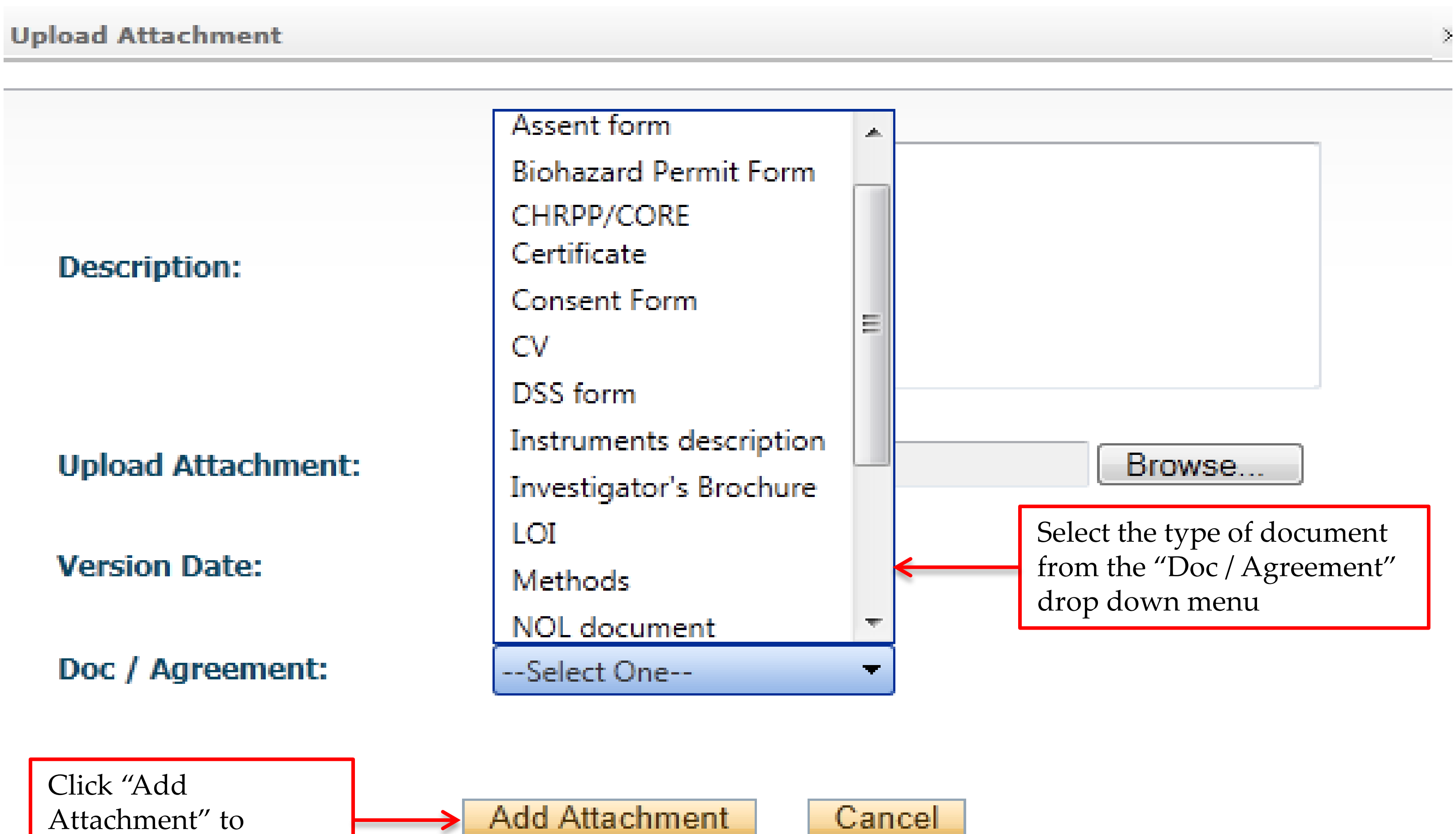
TRAQ Tip! ROMEO does not have an *automatic save* feature. Users are encouraged to hit the “Save” button after completing each tab.

Attachments Tab

- Applicant should attach any document(s) identified on the Checklist sub-tab of the Ethics Form. Users may upload multiple attachments, provided that each is no larger than 5MB. Attachments may be word files, spreadsheets, jpeg files, pdfs, etc.



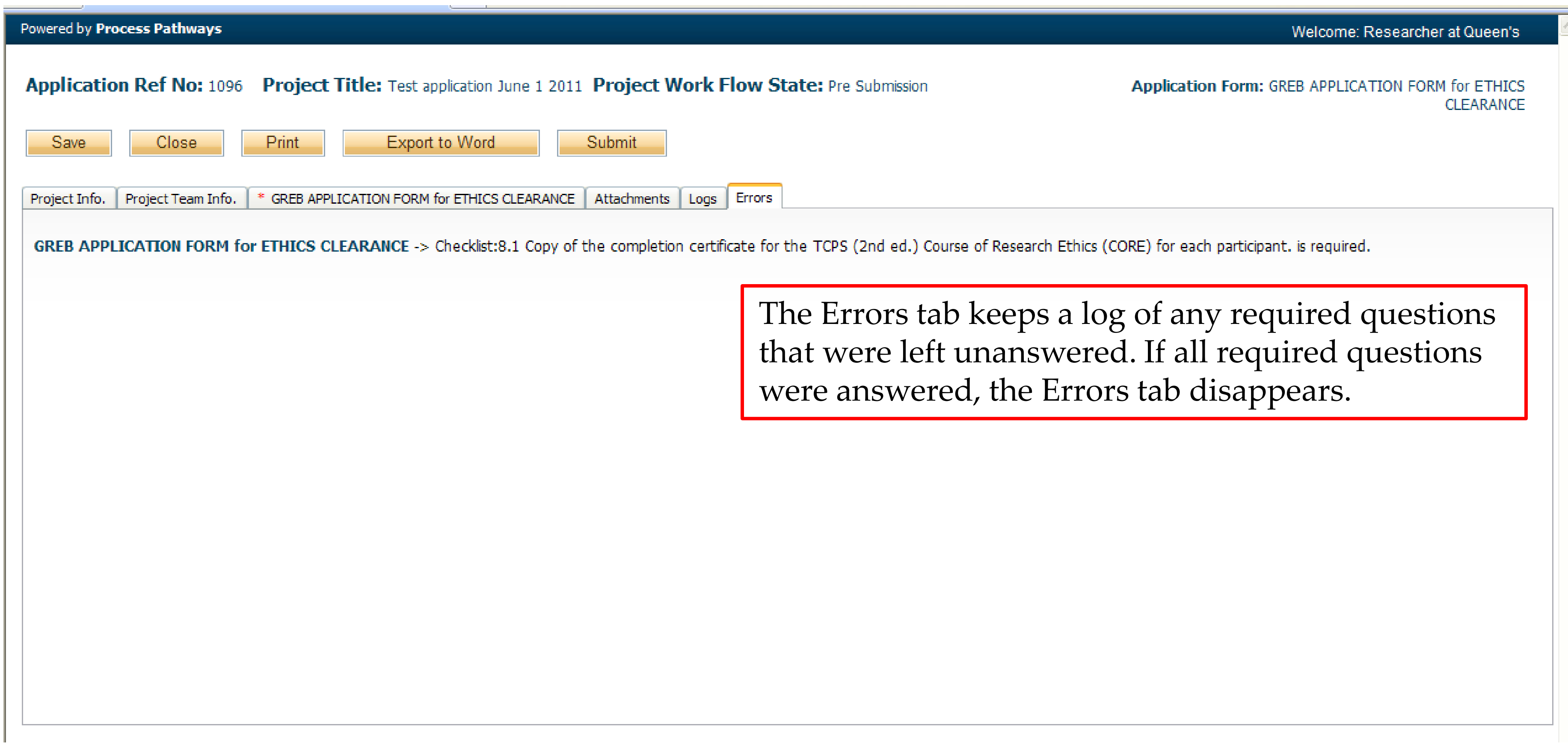
Attachments Tab (Continued…)



Select the type of document from the "Doc / Agreement" drop down menu

Click "Add Attachment" to complete the process

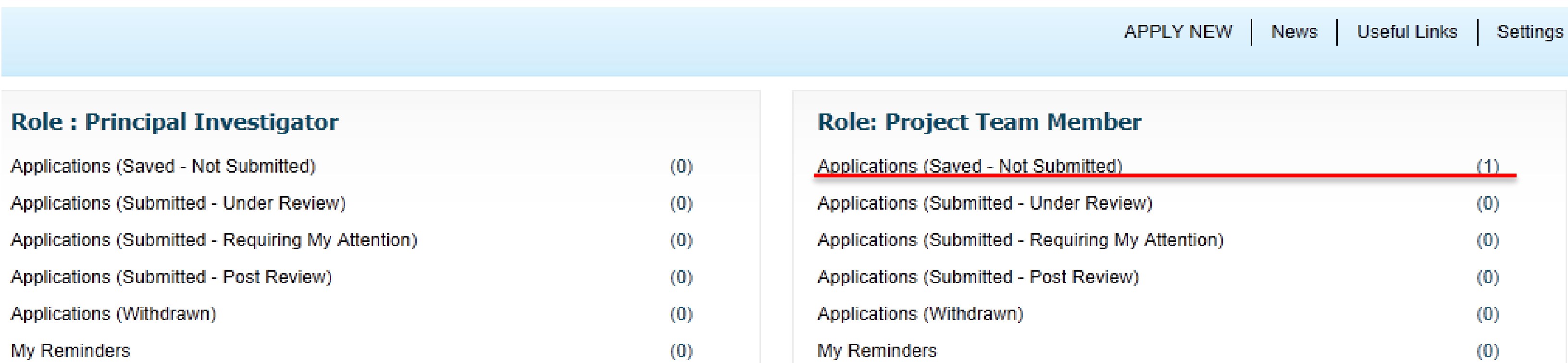
Errors Tab



The Errors tab keeps a log of any required questions that were left unanswered. If all required questions were answered, the Errors tab disappears.

Save and Continue…

- At any point in the process, the applicant may "Save" and "Close" the application and complete it at a later date. The information entered will be saved and the user can access it again through their Researcher's home page under "Applications (Saved – Not Submitted)". Important: Do not close that application by clicking the X at the top of your browser, doing so will result in the application being "locked" preventing other team members from accessing it.



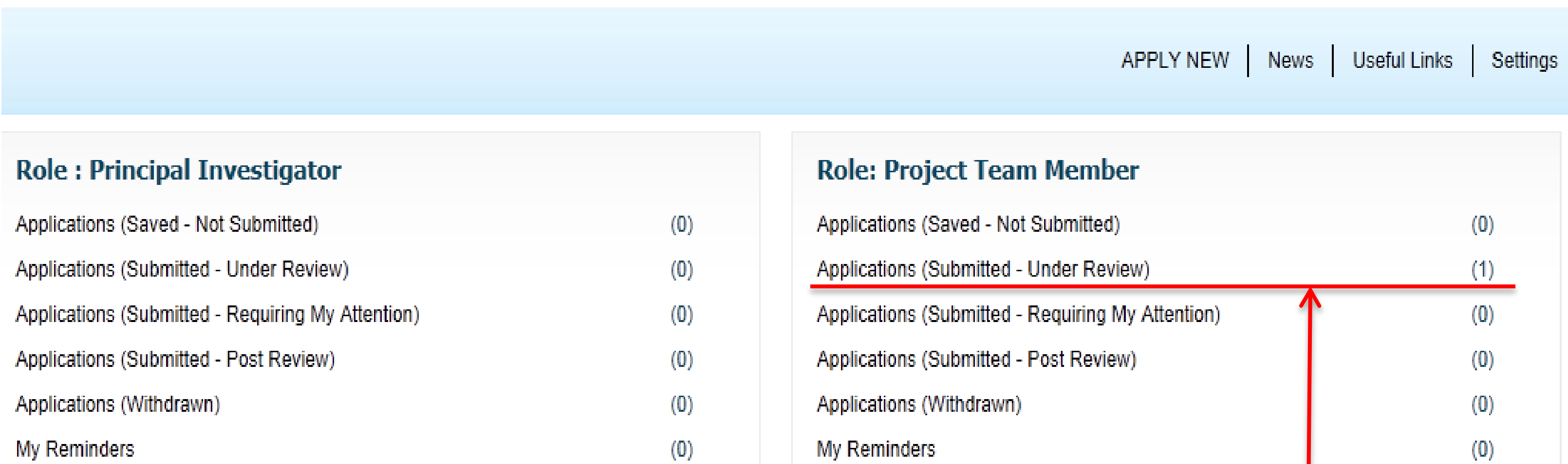
TRAQ Tip! Though ROMEO has no *automatic save* feature, it does have a *time out* feature! If you need to step away from your computer, you should always hit "Save" and "Close" as a precautionary measure. Failing to do so could result in information being lost and the application being "locked". The user responsible for "locking" the application is able to "unlock" it by accessing it again and exiting properly. All other team members, who find themselves "locked out" of the application, can either contact the user who "locked" it or the TRAQ team for support (ext. 77433; email: traq@queensu.ca).

Submitting the Application

- From the moment you assign another P.I. and team members to the project, they will be able to view and edit the application.
- The P.I. is the only person who can submit the application, this cannot be done on their behalf.
- The team member responsible for completing the application should notify the P.I. when the application is ready to be reviewed and submitted.
- Once the application has been submitted, the P.I. will receive an email confirming the reception of your application – any team member associated with the application will be copied on the correspondence.

Applications Under Review

- Once the P.I. has submitted the application for review, you will receive an email confirming the reception of your application – any team member associated with the application will be copied on the correspondence. At this stage, you will not be allowed to make any changes to the application. However, it is still available for viewing under "Applications (Submitted – Under Review)".



Click on "Applications (Submitted – Under Review)" to see the work flow state of your applications.

Work Flow State of Applications Under Review

- Check the status of your application(s) under review under the "Work Flow State" column.

	Project Title	Principal Investigator	File No	Application Form Name	Work Flow State	Last Saved	Message
View Clone	Testing Tom and Ingrid	Ingrid Gagnon	6005482	HSREB Application Form for Ethics Clearance - new (Certification\Human Ethics)	ORS Review		Changes made as requested [Action: Re-Submit]

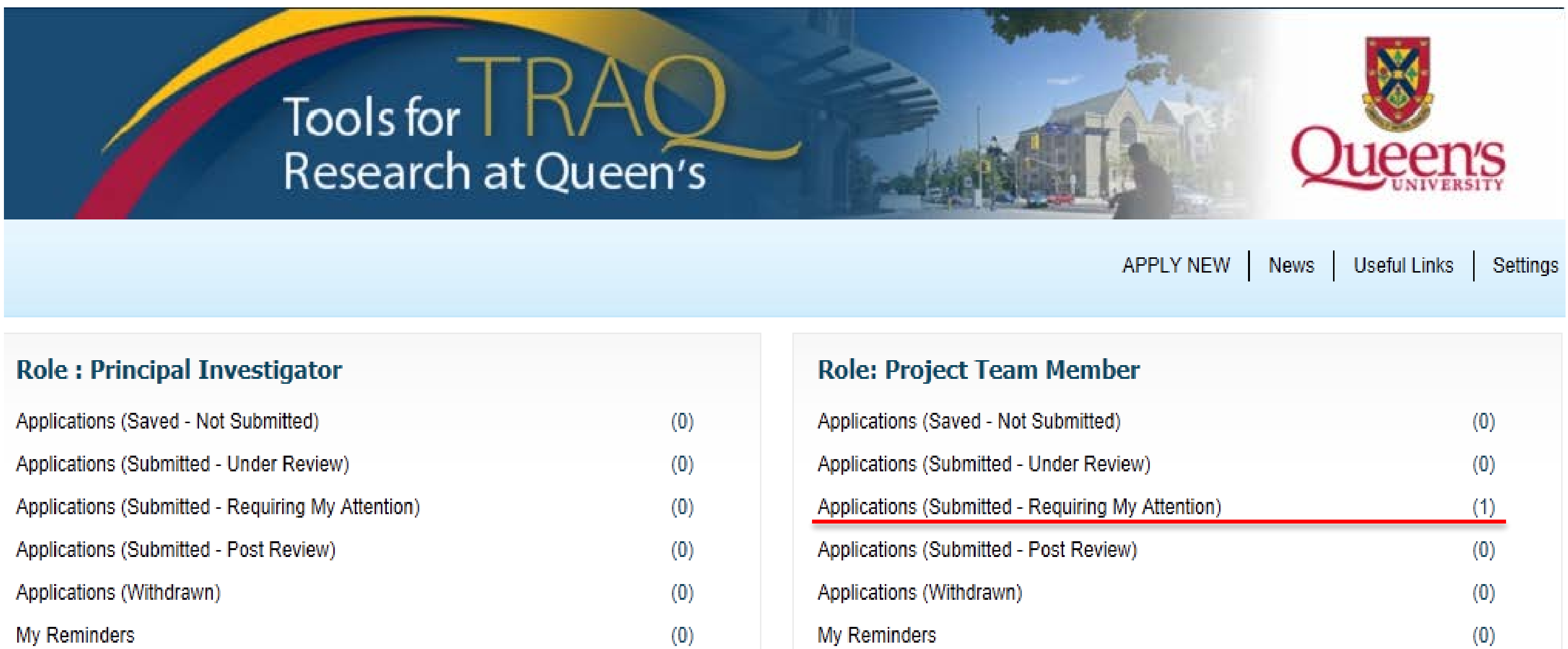
***GREB Applicants Only*:**

- If you are an applicant from one of these departments: School of Business, Cultural Studies, Education, Gender Studies, Geography, Global Development Studies, Kinesiology and Health Studies, Music, Policy Studies, Political Studies, Psychology, Sociology, Urban and Regional Planning, your application will initially be reviewed by the Unit REB.

- All other applications will go straight to the General Research Ethics Board for review

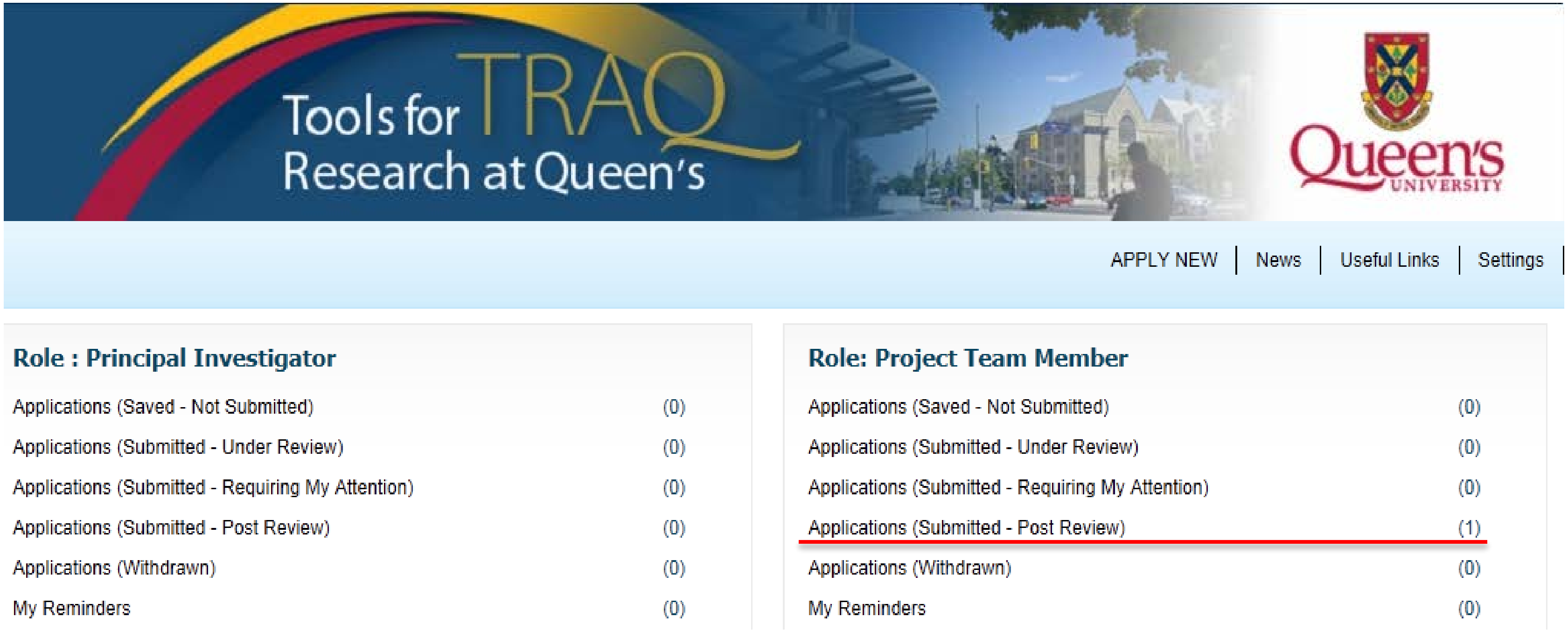
Applications Requiring Revisions

- If the reviewer(s) require any revisions, the application will be pushed back to the applicant(s). At this stage, you will be able to edit the application by clicking on this link: “Applications (Submitted – Requiring my Attention)”. Remember that if you are making the revisions on behalf of the P.I., you will need to let them know when the revisions are completed so that they may re-submit the application.



Approved Applications

- Once the application has been approved, the P.I., Research Coordinator and Supervisor will receive a formal approval letter and email. The application can no longer be modified but is available for viewing under “Applications (Submitted – Post Review)”.



Logs Tab – Workflow Logs

- The Logs tab is a useful tool that allows the applicant(s), reviewer(s) and the Ethics Office to track the history of the application and communicate with one another. Text in blue font represents most recent updates.

- The “Workflow Logs” tracks and time stamps approvals and messages.

Close | Print | Export to Word | Export to PDF

NOTE:You are in view only mode, and changes cannot be saved.

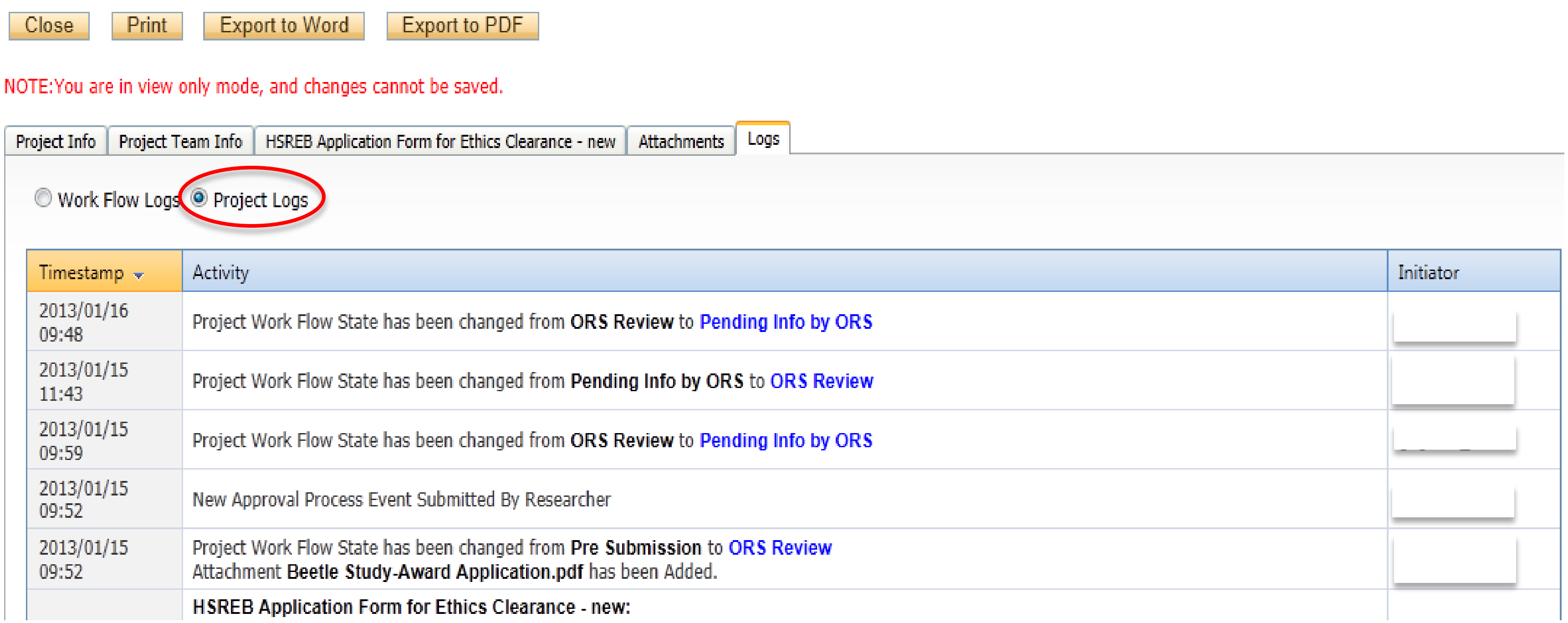
Project Info | Project Team Info | HSREB Application Form for Ethics Clearance - new | Attachments | Logs

Work Flow Logs | Project Logs

Timestamp	Log	Work Flow State	Message	User	Role/Group
16/01/2013 09:48	Project Work Flow State has been changed from **ORS Review** to **Pending Info by ORS**	**ORS Review** -> **Pending Info by ORS**	Consent Form still missing.		Office of Research Ethics
15/01/2013 11:43	Project Work Flow State has been changed from **Pending Info by ORS** to **ORS Review**	**Pending Info by ORS** -> **ORS Review**	Changes made as requested [Action: Re-Submit]		Principal Investigator
15/01/2013 09:59	Project Work Flow State has been changed from **ORS Review** to **Pending Info by ORS**	**ORS Review** -> **Pending Info by ORS**	Dear Dr Gagnon & Dr Herra, Your application went through review board - reviewer requires clarification from researcher. Revised consent form needed. Jan. 15, 2013 Please submit revisions within 2 business days. Regards, Kathy		Office of Research Ethics

Logs Tab – Project Logs

- The "Project Logs" tracks and time stamps every action taken on the application.



Need assistance/have a question?

Contact the TRAQ Helpdesk

(613) 533-6000, ext. 77433

Email: traq@queensu.ca