

How to request reliance on an external IRB

Learn the process for requesting reliance on an external IRB within the eIRB initial application.

- 1 After successfully logging into eIRB portal you should see this landing page.

 **Guide Me**

What do you want to focus on?



eIRB

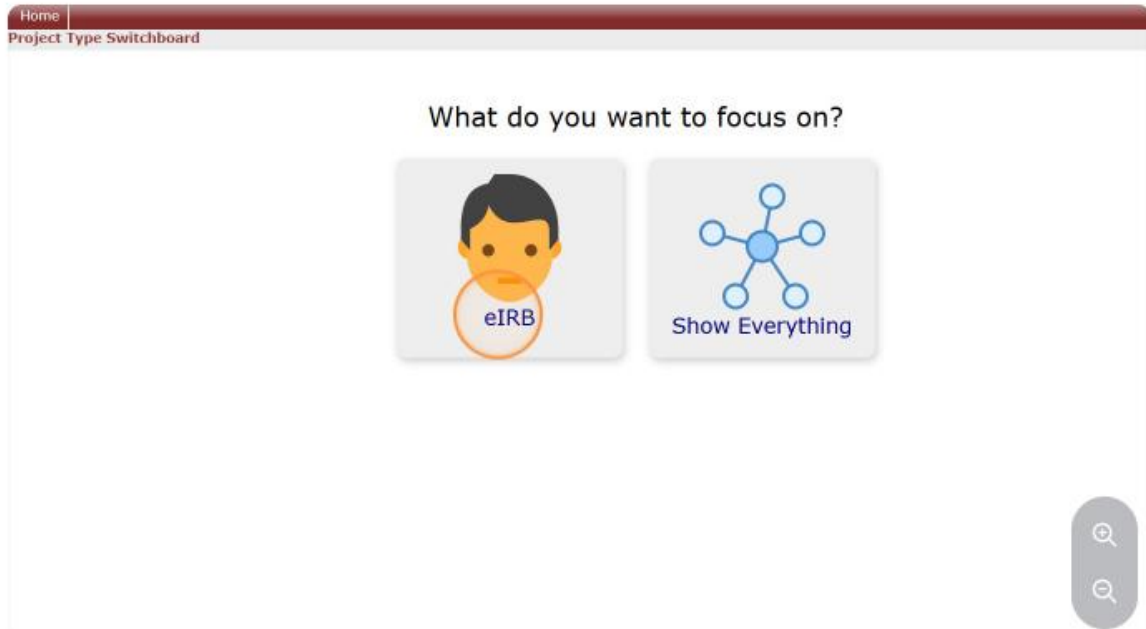


Show Everything



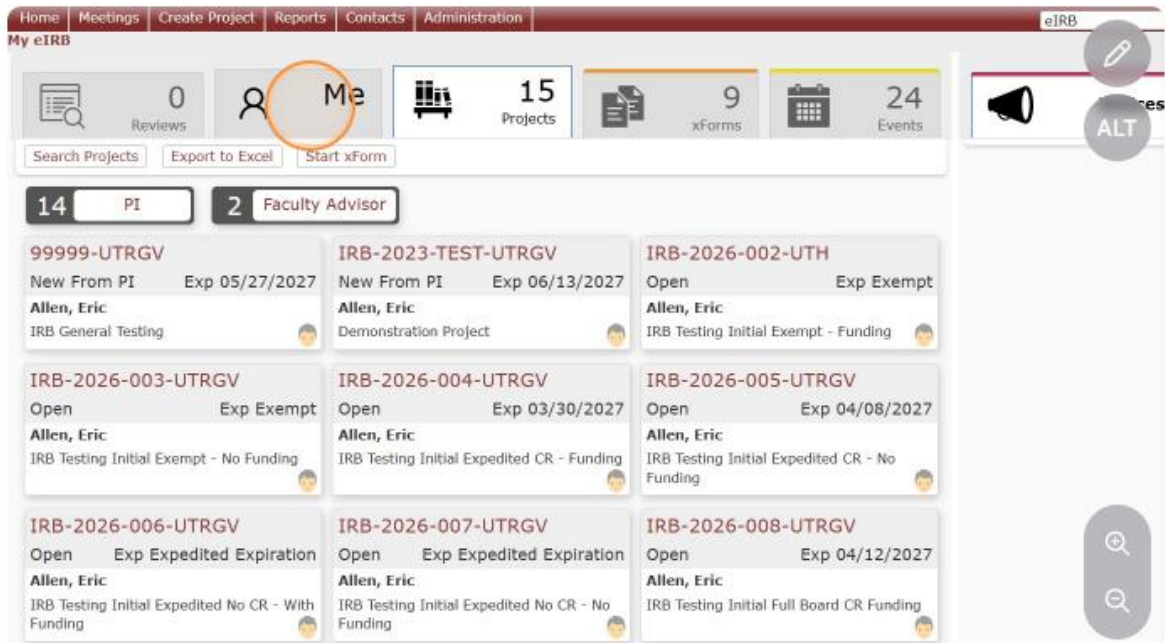
2

Click "eIRB" image.



3

Click "Me"



4 Click "Start xForm"

The screenshot shows the eIRB dashboard interface. At the top is a navigation bar with links: Home, Meetings, Create Project, Reports, Contacts, and Administration. The user's name 'Me' is displayed in the top right. Below the navigation bar, there are several summary cards: 'Reviews' (0), 'Projects' (15), 'xForms' (9), and 'Events' (24). The 'Start xForm' button is circled in orange. Below these cards, there is an 'About Me' section with the user's name 'Allen, Eric', email 'eric.allen@utrgv.edu', and last login time '06/05/2026 9:59 AM ET'. Further down, there is a section for 'IRB Meetings' (1) and a 'Future Meetings' section showing a meeting on '06/30/2026' with the agenda 'Agenda (Not Finalized)'. At the bottom, there are summary cards for 'Past Meetings' (0), 'Active Projects' (16), and 'Total Projects' (18). A search icon is visible in the bottom right corner.

5 Click "IRB Initial Application Form"

The screenshot shows the 'Start Form on User' page. At the top, there is a header with the University of Texas Rio Grande Valley logo and the text 'Start Form on User'. Below this, there is a table with the following columns: 'Action', 'Form (Click to start)', and 'Description'. The table contains one row with the link 'IRB Initial Application Form (Draft)' under the 'Form (Click to start)' column and 'IRB Initial Application Form' under the 'Description' column. The link 'IRB Initial Application Form' is circled in orange. A search icon is visible in the bottom right corner.

- 6 Scroll down to the "Main Research Site" question and select the down arrow to select "External Reliance".

The University of Texas
Rio Grande Valley

Collaborators

General Project Information

Page 1 of 10

IRB Initial Application Form -- General Project Information

Is this project funded? (Required) View Audit

☐ Yes
☐ No

Main Research Site: (Required) View Audit

External Reliance

Is this a multi-site research project? (Required)

A multi-site research study is when there are many participating sites, each institution is enrolling its own subjects and carrying out the protocol at its own site. For non-exempt human subjects research that includes multiple sites, cooperative agreements will be needed (i.e., Single IRB, or Reliance Agreement).

☐ Yes
☐ No

Is another site requesting to rely on the UTRGV IRB? (Required) View Audit

This process is known as "reliance". When another IRB relies on us it means that we will serve as the IRB that provides oversight (IRB of Record) and they do not have to conduct their own separate review of the project. This process is only applicable to non-exempt studies (expedited or full review). E.g., expedited research project approved by UTRGV where the PI is from UTRGV and will be collaborating with faculty at XYZ University.

☐ Yes
☐ No

Will any part of this study be conducted at a VA facility? (Required) View Audit

☐ Yes
☐ No

Is this international research? (Required) View Audit

☐ Yes

- 7 Address the multi-site question, for this example I clicked the "Yes".

The University of Texas
Rio Grande Valley

Collaborators

General Project Information

Page 1 of 10

IRB Initial Application Form -- General Project Information

that provides oversight (IRB of Record) and we do not have to conduct our own separate review of the project. This process is only applicable to non-exempt studies (expedited or full review). E.g., expedited research project approved by XYZ University where the PI is from XYZ university and will be collaborating with faculty from UTRGV.

Note: If the project was determined/approved as Exempt by the external institution, we cannot set up a reliance agreement because the project is exempt from federal regulations. Our researchers will need to submit their own application for exempt determination at UTRGV.

Is this a multi-site research project? (Required)

A multi-site research study is when there are many participating sites, each institution is enrolling its own subjects and carrying out the protocol at its own site. For non-exempt human subjects research that includes multiple sites, cooperative agreements will be needed (i.e., Single IRB, or Reliance Agreement).

☒ Yes
☐ No

Name of External IRB (Required) View Audit

External PI Name (Required)

Please list PI name in the following format: **first name then last name.**

External IRB FWA Number (Required)

Please attach the following:

- IRB approval letter

8 Click in the textbox and enter the appropriate name(s).

that provides oversight (IRB of Record) and we do not have to conduct our own separate review of the project. This process is only applicable to non-exempt studies (expedited or full review). E.g., expedited research project approved by XYZ University where the PI is from XYZ university and will be collaborating with faculty from UTRGV.

Note: If the project was determined/approved as Exempt by the external institution, we cannot set up a reliance agreement because the project is exempt from federal regulations. Our researchers will need to submit their own application for exempt determination at UTRGV.

Is this a multi-site research project? (Required)

A multi-site research study is when there are many participating sites, each institution is enrolling its own subjects and carrying out the protocol at its own site. For non-exempt human subjects research that includes multiple sites, cooperative agreements will be needed (i.e., Single IRB, or Reliance Agreement).

- ☒ Yes
☐ No

Please indicate the name(s) of the other site(s) that are conducting research and include the names of any site investigators. (Required)

Name of External IRB (Required)

[View Audit](#)

External PI Name (Required)

Please list PI name in the following format: **first name then last name.**

9 Click in the textbox and enter the appropriate response.

Initial Application Form -- General Project Information

A multi-site research study is when there are many participating sites, each institution is enrolling its own subjects and carrying out the protocol at its own site. For non-exempt human subjects research that includes multiple sites, cooperative agreements will be needed (i.e., Single IRB, or Reliance Agreement).

- ☒ Yes
☐ No

Please indicate the name(s) of the other site(s) that are conducting research and include the names of any site investigators. (Required)

Smart University

Name of External IRB (Required)

[View Audit](#)

External PI Name (Required)

Please list PI name in the following format: **first name then last name.**

External IRB FWA Number (Required)

Please attach the following:

- IRB approval letter
- Copy of approved IRB application
- Copy of approved materials (e.g. consent forms, recruitment materials, and data collection instruments)
- Copy of reliance agreement (if available as an attachment)

10

Click in the textbox and enter the appropriate name.

Smart University

Name of External IRB (Required) [View Audit](#)

Commercial IRB

External PI Name (Required)
Please list PI name in the following format: **first name then last name.**

External IRB FWA Number (Required)

Please attach the following:

- IRB approval letter
- Copy of approved IRB application
- Copy of approved materials (e.g. consent forms, recruitment materials, and data collection instruments)
- Copy of reliance agreement (if available as an attachment)
- Copy of request for local context from reviewing IRB
- Copy of the protocol

(Required)
[Add Attachment](#)

Is another site requesting to rely on the UTRGV IRB? (Required) [View Audit](#)

This process is known as "reliance". When another IRB relies on us it means that we will serve as the IRB that provides oversight (IRB of Record) and they do not have to conduct their own separate review of the project. This process is only

11

Click in the textbox and enter the appropriate number.

Smart University

Name of External IRB (Required) [View Audit](#)

Commercial IRB

External PI Name (Required)
Please list PI name in the following format: **first name then last name.**

Dr. Peter Smith

External IRB FWA Number (Required)

Please attach the following:

- IRB approval letter
- Copy of approved IRB application
- Copy of approved materials (e.g. consent forms, recruitment materials, and data collection instruments)
- Copy of reliance agreement (if available as an attachment)
- Copy of request for local context from reviewing IRB
- Copy of the protocol

(Required)
[Add Attachment](#)

Is another site requesting to rely on the UTRGV IRB? (Required) [View Audit](#)

This process is known as "reliance". When another IRB relies on us it means that we will serve as the IRB that provides oversight (IRB of Record) and they do not have to conduct their own separate review of the project. This process is only applicable to non-exempt studies (expedited or full review). E.g., expedited research project approved by UTRGV where the PI is from UTRGV and will be collaborating with faculty at XYZ University.

- 12 Click the "Add Attachment" button to add the required documents.

External PI Name (Required)
Please list PI name in the following format: **first name then last name.**
Dr. Peter Smith

External IRB FWA Number (Required)
00000563

Please attach the following:

- IRB approval letter
- Copy of approved IRB application
- Copy of approved materials (e.g. consent forms, recruitment materials, and data collection instruments)
- Copy of reliance agreement (if available as an attachment)
- Copy of request for local context from reviewing IRB
- Copy of the protocol

(Required)
Add Attachment

Is another site requesting to rely on the UTRGV IRB? (Required) [View Audit](#)
This process is known as "reliance". When another IRB relies on us it means that we will serve as the IRB that provides oversight (IRB of Record) and they do not have to conduct their own separate review of the project. This process is only applicable to non-exempt studies (expedited or full review). E.g., expedited research project approved by UTRGV where the PI is from UTRGV and will be collaborating with faculty at XYZ University.
☐ Yes
☐ No

Will any part of this study be conducted at a VA facility? (Required) [View Audit](#)
☐ Yes
☐ No

- 13 Click "Select files..." and add the documents one by one.

Add Attachment

Name: (leave blank to use name of uploaded file)

Type:

File(s): **My computer**  

Select files... (or drop file)

Attach **Cancel**

Is another site requesting to rely on the UTRGV IRB?

- 14 Click the down arrow and select the appropriate type of document. (e.g. approval letter).

The screenshot shows a web-based document upload interface. At the top, there is a header bar with a refresh icon and a close icon. Below this, a red 'd:' label is visible. A text input field contains the text 'f uploaded file)'. To the right of this field is a dropdown menu, which is highlighted with an orange circle and a red asterisk. Below the text field, there is a 'box' logo. At the bottom of the interface, there is a light gray bar with the text '(or drop files here to upload)'. To the right of this bar are two buttons: a 'Done' button with a checkmark icon and a button with a magnifying glass icon. The interface is enclosed in a light gray border with a close icon in the bottom left corner.

15 In this example I selected "Reliance Agreement"

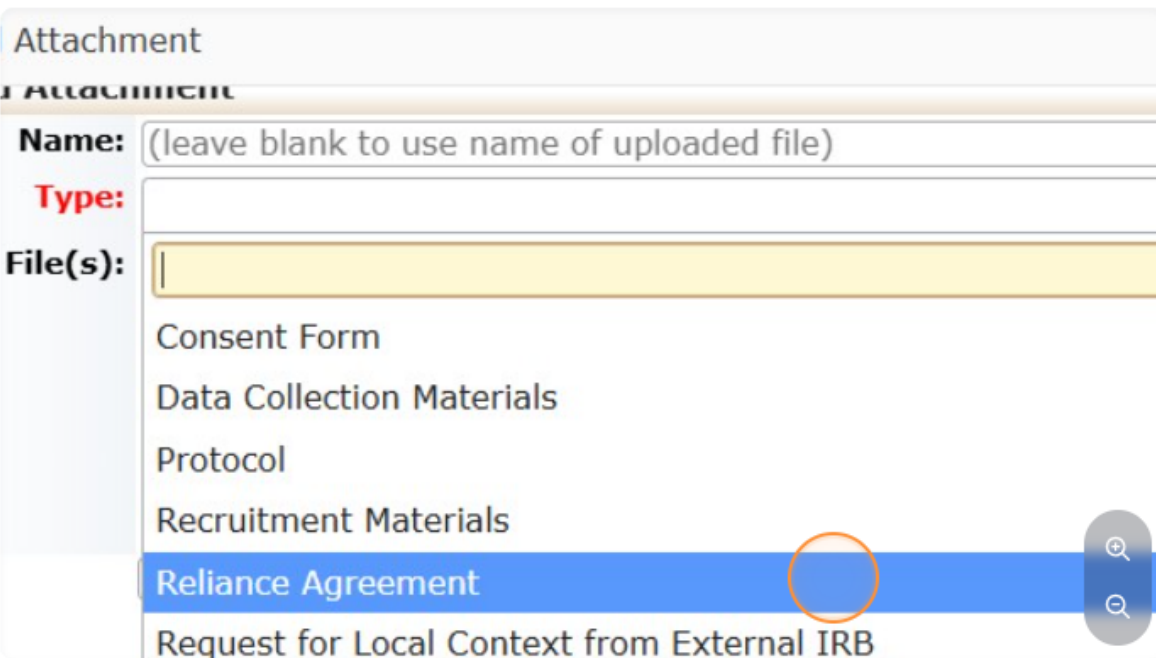
Attachment

Name: (leave blank to use name of uploaded file)

Type:

File(s):

- Consent Form
- Data Collection Materials
- Protocol
- Recruitment Materials
- Reliance Agreement**
- Request for Local Context from External IRB



16 Click "Attach"

Add Attachment

Name: (leave blank to use name of uploaded file)

Type: Reliance Agreement

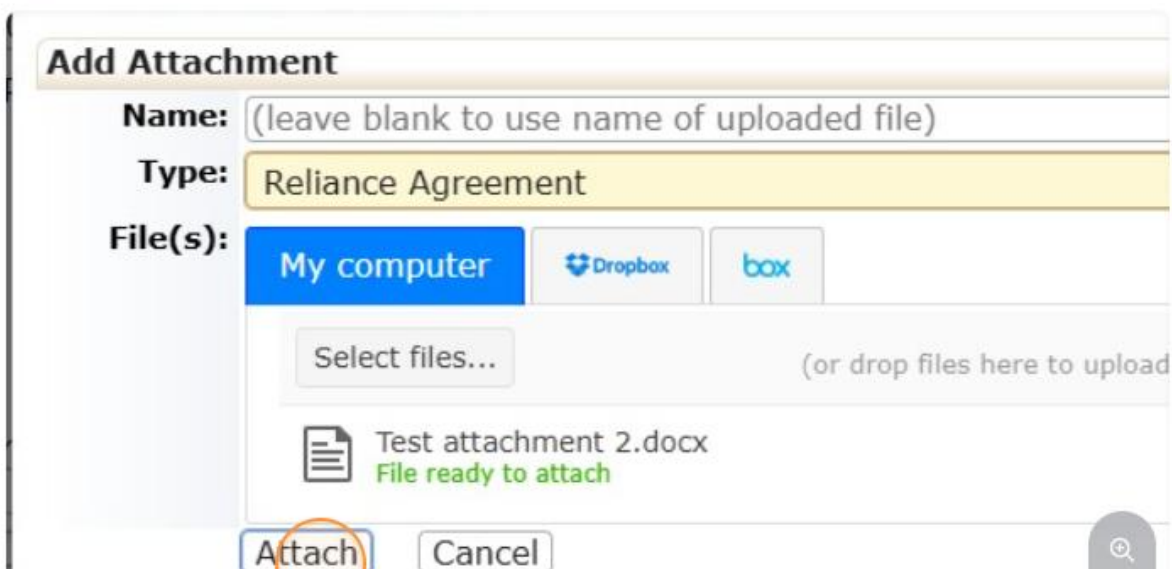
File(s):

My computer Dropbox box

Select files... (or drop files here to upload)

Test attachment 2.docx
File ready to attach

Attach Cancel



This process is known as "reliance". When another IRB relies on us it means

17

Click the appropriate response, in this example I selected "No". These are all of the questions related to reliance in the application.

Please attach the following:

- IRB approval letter
- Copy of approved IRB application
- Copy of approved materials (e.g. consent forms, recruitment materials, and data collection instruments)
- Copy of reliance agreement (if available as an attachment)
- Copy of request for local context from reviewing IRB
- Copy of the protocol

(Required)

Add Attachment

✕ 📎 Test attachment 2.docx Reliance Agreement

Is another site requesting to rely on the UTRGV IRB? (Required)

[View Audit](#)

This process is known as "reliance". When another IRB relies on us it means that we will serve as the IRB that provides oversight (IRB of Record) and they do not have to conduct their own separate review of the project. This process is only applicable to non-exempt studies (expedited or full review). E.g., expedited research project approved by UTRGV where the PI is from UTRGV and will be collaborating with faculty at XYZ University.

- ☐ Yes
- ☒ No

Will any part of this study be conducted at a VA facility? (Required)

[View Audit](#)

- ☐ Yes
- ☐ No

Is this international research? (Required)

[View Audit](#)

- ☐ Yes
- ☐ No

Human Subjects Research Determination Questions

[View Audit](#)

Please select all that apply (Required)

[Click here for definitions of the items below.](#)