**Reliance Walkthrough Updated**

0:00  
In this video, I will be detailing how to submit a Reliance request and the floor Reliance request review process through issuing a determination letter.

0:08  
To begin, navigate to the Reliance System homepage and select Login.

0:13  
If you do not have a current verified user account, select Register at this process selecting Login.

0:20  
Use the current method that you selected at the sign Up process to log into the Reliance System.

0:27  
Once you are logged in as a user, you will come to the Global View landing page.

0:32  
Here I am logged in as a site admin.

0:35  
There are two user roles within the Reliance system that can submit Reliance request.

0:39  
A general user, which is someone who may be a part of a study team, for example, a study coordinator or a site investigator, they can submit a Reliance request.

0:50  
And a site admin who is a point of contact of an institution can also submit a Reliance request.

0:56  
To start this process, navigate to the left hand navigation and select all requests underneath Reliance.

1:04  
Here we come to the Reliance dashboard where a user will be able to see all of the Reliance requests that they have either submitted or where they are listed as a research personnel.

1:14  
For a site admin, they'll be able to see all the requests that are associated with the institution that they are affiliated with and the requests where they are listed as research personnel.

1:24  
Selecting at the top right hand corner.

1:27  
The new reliance request navigates us to the study details portion where we can enter in the principal investigator of the home institution.

1:35  
Please note that a home institution and a reviewing RB of a request must be on the Smart RB Agreement version 3 in order to submit this request successfully.

1:46  
Once you enter in the Principal Investigators information here, you will be able to go ahead and select save and continue.

1:56  
A phone number and degrees are not required, but if you do have this information, you can enter it in here.

2:02  
At this time we navigate to the next page, which is study information.

2:08  
On this page, we have the title of the research study and the study description that is placed here.

2:15  
This description needs to be very brief, and you can also go ahead and mark the requested reviewing RB.

2:22  
This can either be the home institution or another institution that you select for this video.

2:29  
I'll be showing it as the home institution being listed as the requested reviewing RB.

2:34  
The protocol number and NCT number are not currently required.

2:38  
If you have this information, a user can place it here.

2:41  
At this time, what is required is marking the reason for requesting this institution.

2:47  
Once this has been marked, you can go ahead and select Save and continue as a user.

2:52  
If at any point within filling out this request you do not have the information as acquired or you just want to save your progress, you can select Save, Draft and Exit.

3:01  
This will navigate the user to the Reliance dashboard and that request will populate on their dashboard in the Draft status.

3:09  
When you are ready to edit again, underneath the Actions column, you can select the vertical...

3:15  
and select Edit Request.

3:17  
Once this is selected, you will start back at the study details portion where you'll be able to enter in any information.

3:25  
Now we can go to upload documents.

3:28  
A research protocol is required for each Reliance request.

3:32  
All documents must be uploaded in the PDF format and smaller than 10 megabytes.

3:41  
Once we have uploaded at least one research protocol, we can save and continue to the next section.

3:47  
Here we have the funding source section.

3:49  
If this is applicable to your study and you have this information, you can insert it here.

3:54  
One of the things that you can do within the reliance request is add a site at any time.

3:59  
So whether the request is submitted or it is in the reviewing IRB identified state or even at reliance reach, a user can enter in another site at any point within this process.

4:11  
Here we already see detailed the sample university, which is the home institution of this request.

4:16  
It is marked with this home institution icon and cannot be deleted.

4:20  
We're going to go ahead and add another institution on this request because two institutions are required in order for the submission of a request here.

4:33  
We're going to go ahead and mark another site investigator and place a current e-mail address for them.

4:40  
This is going to help for this particular reliance request to also populate on their reliance dashboard.

4:47  
Similar to the other sections, a phone number I degree are not required, but if you do have that information, you can place it here.

4:56  
Once you Scroll down a little bit further as a user, you can mark save and the list of sites page will update with the information here.

5:04  
You notice that we have the ability to delete this site.

5:07  
If a user would like to delete the site, they can select this trash can icon and a text box will populate asking them for the reason that they would like to delete this site and any additional comments that they would like to populate.

5:20  
Once they enter in anything here, they will select remove and then the site will be removed.

5:28  
If we are ready to move on to the next step of entering site details, the user can select Save and continue.

5:34  
Moving to this page, we see that this is broken up into two sections.

5:38  
The top section is for research personnel.

5:41  
Here we can add any personnel that we would like to be notified of this reliance request.

5:47  
When we select add a person, we go ahead and we have the roll drop down that signifies either site investigator, study coordinator, regulatory coordinator or other study personnel.

6:05  
We can enter in an e-mail address and this is going to help for the user to be able to have access to this Reliance request on the Reliance Dashboard.

6:17  
You will notice on this page as well that the site investigator, similar to the home institution will not able to be deleted from this page.

6:25  
You do have the option to delete any added personnel using the delete icon.

6:30  
You can also make edits using the edit icon here.

6:36  
When we are finished with adding research personnel, we can scroll to the second-half of the site's detail, where we're able to add research participants and activities.

6:45  
It is required to make a selection at each of these sections in order to move to the next site to enter in their request activities and move on to our second site, which is Sample University 2.

7:03  
Here on the Request summary page, we are able to see an expanded view of everything that we have inputted within this reliance request.

7:11  
Each of these sections are collapsible and expandable.

7:14  
When you are ready to submit, you can go ahead and select Submit Request at the bottom of the Reliance request.

7:23  
Selecting Submit takes the user back to the Reliance dashboard page where they're going to see their request in the under Review status.

7:31  
Under Review status is the status of the Reliance request that has been submitted.

7:36  
Now, since I am still logged in as the site admin of the home institution, I can go ahead and select the Expand option underneath the Actions column.

7:45  
I am ready now to mark my Reliance pre-check decision here.

7:49  
Underneath request activity is the Reliance Pre-check.

7:53  
Once this is selected as the home institution, I can go ahead and mark whether this request is eligible to move forward in the Reliance request process.

8:01  
If I mark eligible for reliance, the request then goes to an eligible state.

8:09  
We can see that state from the Request activity page where overall status is eligible or from the Reliance dashboard now that we have marked our Reliance pre-check decision.

8:19  
Since I am the home institution of this request, I also have the 1st right of refusal.

8:24  
Going by that actions column again and pressing the expand button, I can now make a Reviewing RB decision.

8:31  
Selecting Reviewing RB underneath the request details, I come to the Reviewing RB decision page.

8:37  
Once I mark yes, I can go ahead and select Make a Decision and officially mark my decision.

8:46  
This will change the overall status of the request to Reviewing RB Identified.

8:52  
I am currently logged in as the site admin of Sample University 2.

8:57  
If I am ready to make my Sites Reliance decision, I click the expand button from the Actions column and I go under Sites Reliance.

9:06  
I will also as a site be able to go to the Request activity page and see the overall site status along with a graphic that details who is awaiting response and all of the listed sites here.

9:19  
When I'm ready to mark my site's reliance, I go to the Sample University 2 page which is the name of my institution and I will come up on the Institution reliance form here.

9:31  
I can mark yes or no to this section.

9:36  
Once I'm ready, I select Submit and I officially submit my decision.

9:41  
Now I'm logged in as the site admin of the home institution and reviewing IRB sample.

9:47  
University 2 has already marked that they are willing to rely and the overall request goes into Reliance form submitted.

9:55  
Once I'm ready to issue a determination letter, I select the Expand option underneath the Actions column here.

10:04  
I select Request Activity and I'm ready to go ahead and make a determination for Sample University 2 here as the site admitted the reviewing RBI, select Accept or Deny.

10:20  
Once selected, it will open up an e-mail box that will be able to show me the full e-mail template that will go out to the relying site here.

10:31  
Once I select Edit, there are three fields that are editable on this e-mail template, the CC line I can add any additional emails here, and the blind copy line I can also add other emails.

10:44  
I also have the option to add any additional comments.

10:48  
Once I'm ready, I can go ahead and select Accept Determination and here the overall Reliance request status will update to Reliance Reach and the graphic will show all the sites that are relying.

11:01  
We'll also see an update to the request history.

11:04  
To view other videos and directions, navigate to the User Guides page.