

**INSTRUCTIONS FOR USE OF THE
ETSU/BALLAD COLLABORATIVE RESEARCH
DATA TRANSFER AND USE AGREEMENT TEMPLATES**

All fields contained in this template are required unless otherwise noted, and must be completely filled out for this template to be valid. You may add additional sections to this template as necessary, but you should not delete any statements (other than those bracketed in red or as otherwise instructed) contained herein.

Each Template contains the following **required** Attachments:

- I. Attachment 1: Project Specific Information
- II. Attachment 2: Data-specific Terms and Conditions
- III. Attachment 3: Identification of Permitted Third Parties (if any)
- IV. Attachment 4: Additional Terms and Conditions

These attachments are specific to the type of transfer and use occurring and have different provisions based on the type of data your project involves.

When choosing which template to use you must determine:

- What type of transfer is occurring. The One-Way Data Use templates should be used when there is one-way sharing of data between 2 (two) parties. The Reciprocal Data Use templates should be used when there is two-way sharing of data between 2 (two) parties.
- What type of data does your project involve. The template options include:
 - De-Identified Human Subjects Data
 - Limited Data Set*
 - Personally Identifiable Information – Common Rule
 - Personally Identifiable Information – HIPAA*
 - Personally Identifiable Information – FERPA**

*If you have HIPAA related questions please contact hipaa@etsu.edu

**If you have FERPA related questions please contact williamslk@etsu.edu

If your project involves data that you do not think falls within one of these categories contact research@etsu.edu for assistance.

All fields that require attention appear in **RED**. For each section that requires attention, please carefully read the additional instructional information that follows that particular field in **[bracketed red]**. This information may help you determine what to include for each field.

When you complete this form for submission to the IRB, you should have:

- ✓ Filled out all fields appearing in **RED** and changed the text color to black;
- ✓ Deleted all the instructions that appear in **[bracketed red]**;
- ✓ Deleted any optional language that appears in **RED**; and
- ✓ Deleted this instruction page