

# Greenphire ClinCard

## How do I get started???

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Link to Greenphire webpage: <https://financialservices.ecu.edu/greenphire/>

All of AP's Greenphire documentation is located on this webpage.

### **Step 1: Set up your study in Greenphire**

- Submit a Team Dynamix ticket – link is on AP Greenphire webpage
- Team Dynamix training guide will walk you through all steps needed to submit a request. (link to guide is on AP Greenphire webpage)
  - As part of setting up a new study in Greenphire, you will be asked for names of Site Coordinator(s) and Study Approver(s). AP will set up these individuals and grant access based on their individual roles. For explanation of roles, please refer to Greenphire Department SOP. (link to SOP is on AP Greenphire webpage)
- A completed/approved Study Voucher Authorization Form is required to be attached to each 'Set Up a New Study' request. (link to form is on AP Greenphire webpage)
- A completed/signed Consent to Collect, Use and Disclose Social Security Number form is required to be attached if participant payments are \$100 or more, or if participant is receiving payments from other studies, regardless of dollar amount of each payment. (link to form is on Greenphire webpage)
  - Note: If either the Study Voucher Authorization Form or the Consent to Collect, Use and Disclose Social Security Number form is a DocuSign document, please save first before uploading. If you do not save, the signatures/approvals will not appear in attached document.
- AP will contact you after study is created about coming to pick up cards or have them sent to you. AP is located in the Financial Services Building at 120 Reade St, Greenville, NC 27858.
  - Please bring an ID to pick up cards.

### **Step 2: Assigning ClinCards and Paying Participants**

- Before you can pay a participant, you will have to assign their ClinCard to that participant in Greenphire.
- After assignment, you can now make participant payments.
  - Instructions on how to assign and make payments are in the Greenphire Department How-To-Guide. (link to this guide is on AP Greenphire webpage)
- If processing a participant reimbursement, please either upload receipt into Greenphire or be prepared to retain receipt in department and mark reimbursement accordingly.
  - Instructions on how to process participant reimbursements are found in the Greenphire Department How-To-Guide. (link to this guide is on AP Greenphire webpage)