Greenphire ClinCard
Team Dynamix ticket requests
Last revision date: 08/04/2022

Entering a Team Dynamix ticket request is the first step to setting up your study in Greenphire. This request process will also be the mechanism you will use for changes to your study in Greenphire, changes to users in Greenphire or making a request for additional cards.
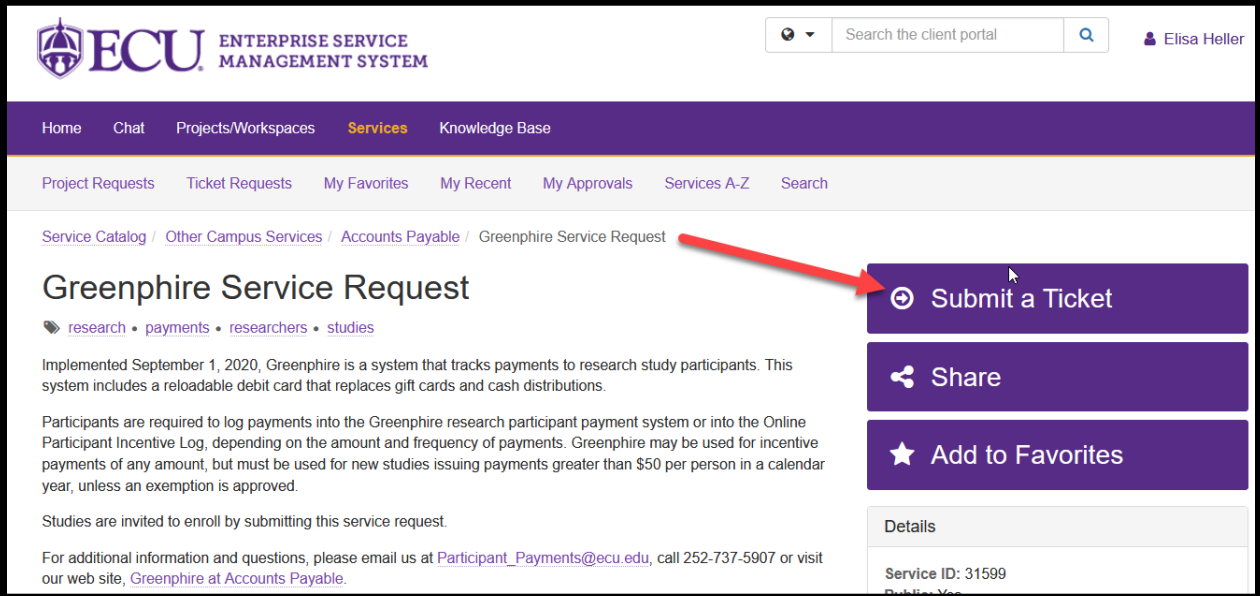
The below link is the link to use for all requests in Greenphire:

https://ecu.teamdynamix.com/TDClient/Requests/ServiceDet?ID=31599

To start, click on above link
The below screen will appear
- Click on 'Submit a Ticket'

The below screen will appear
- Requestor and Acct/Dept should be auto-populated
- Enter Callback Number
- Click on drop down arrow for Request Type

The below drop-down box will appear

- You will have the following options to choose from:
    - Set up a new study
    - Change an existing study
    - Add a new user to a study
    - Request additional cards
    - Other

Set Up a New Study

After clicking on Set up a new study, the below screens will appear
The fields with a red asterisk are required to be populated.

Request Type *

Set Up a New Study

Description * ?

Enter General Ticket Description, Description of Changes, etc.

Study Start Date *

Study End Date (Estimated Study End Date) *

Date Needed By

Study Budget is asking for the total amount of participant payments for entire study.
Participant Payment has a drop-down field.

Study IRB# *

Department FOAP * ?

Fund-Organization-Account-Program-(Optional Activity Code): ######-######-#####-####
Greenphire can only accept one FOAP.

Study Sponsor *

Study Budget *

Participant Payment *

Start typing...

Choose one payment or more than one payment.
If you click on One payment, another field will appear asking for the payment amount.

If you click on More than one payment, please attach a milestone schedule to your request.

|
One payment
More than one payment (Attach Milestone Schedule)
Start typing...

Participant Payment *

One payment

Payment Amount *

Will mileage be reimbursed? *

Start typing...

Start typing...

|
No
Yes

For mileage reimbursement, click on the drop-down box and answer either yes or no.

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Will mileage be reimbursed? *

Yes

Mileage calculation

Start typing...

Flat Rate

Per Mile

Flat rate means you will enter the mileage rate at the time you make a participant payment.
If you click on per mile, the below screen will appear.

What rate per mile?

PI Name, Email and Phone # *

Enter the Principal Investigator's name, Email and Phone #.

Study Coordinator Name, Email & Phone *

Study Coordinators are responsible for registering participants, assigning ClinicCards, and paying participants. Please list name, email and phone number of each study coordinator. Limited to 2 Study Coordinators.

Study Approver Name, Email & Phone *

Study Approvers approve payments (either before or after participant is paid). Study approvers do not have ability to register or pay a participant.

Any additional users? ⦾

List each user's name, email, phone # and role needed.

# of cards needed for first 90 days or initial setup *

# of cards needed for the life of the study

Additional Comments

A Study Voucher Authorization Form is required for ALL studies and must be attached. AP will not add your study to Greenphire without this completed/approved form.

If your participants will be paid $100 or more, or if participant is receiving payments from other studies, regardless of dollar amount of each payment, you will also need to attach a completed/signed Consent to Collect, Use and Disclose Social Security Number form.

Note: If either of these forms are a DocuSign document, please save first before uploading. (If you do not save before uploading, signatures/approvals will not appear in attachment).

These two forms are on the Greenphire webpage – below is a link to this webpage:
https://financialservices.ecu.edu/greenphire/

Once form(s) are attached, click REQUEST. This will complete and submit your request to AP.

Attachment ⍰

REQUIRED: Please attach the completed and approved Study Voucher Authorization Form AND list of Milestone Payments (ex: initial screening, labs, etc...). These are MANDATORY for Setting Up a New Study.

Consent to Collect, Use and Disclose Social Security Number form is REQUIRED for participant payments of $100 or more.

Browse...	No file chosen

Request

<u>Change an Existing Study</u>

After clicking on Change an Existing Study, the below screens will appear.

The fields with a red asterisk are required to be completed.

All 4 types of changes require the completion of fields on the next two screen shots.

Request Type *

Change an Existing Study

Type of change(s) needed *

☐ Change in Milestones
☐ Change in Study
☐ Change in User Role
☐ Other

Description * ⍰

Enter General Ticket Description, Description of Changes, etc.

Effective date of change *

Study IRB# *

Attachment ❓

REQUIRED: Please attach the completed and approved Study Voucher Authorization Form AND list of Milestone Payments (ex: initial screening, labs, etc...). These are MANDATORY for Setting Up a New Study.

Consent to Collect, Use and Disclose Social Security Number form is REQUIRED for participant payments of $100 or more.

Browse...   No file chosen

Request

If you click on 'Change in User Role', you will have to complete two more fields – see below:

Type of change(s) needed *

☐ Change in Milestones
☐ Change in Study
☑ Change in User Role
☐ Other

User's Name, Email & Phone *

Permission(s) Needed *

☐ Add
☐ Modify
☐ Delete

Clicking REQUEST at end of form will complete and submit your request to AP.

Add a New User to a Study

After clicking on Add a New User to a Study, the below screens will appear.
The fields with a red asterisk are required to be completed.
All 3 types of roles require the completion of fields on the next two screens.
Click on the type of role.

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Request Type *

Add a New User to a Study

Description * ❓

Enter General Ticket Description, Description of Changes, etc.

User's Name, Email & Phone *

User Role *

☐ Study Approver

☐ Study Coordinator

☐ Other

Study IRB #s * ❓

Please list all Studies IRBs that individual needs to have access to.

Attachment ❓

REQUIRED: Please attach the completed and approved Study Voucher Authorization Form AND list of Milestone Payments (ex: initial screening, labs, etc...). These are MANDATORY for Setting Up a New Study.

Consent to Collect, Use and Disclose Social Security Number form is REQUIRED for participant payments of $100 or more.

Browse...   No file chosen

Request

If you click on 'Other' role, another field will appear that requires completion.

Clicking REQUEST at end for form will complete and submit your request to AP.

Request Additional Cards

After clicking on Request Additional Cards, the below screens will appear.
The fields with a red asterisk are required to be completed.

Clicking REQUEST at end for form will complete and submit your request to AP.

Other

After clicking on Other, the below screen will appear.
The fields with a red asterisk are required to be completed.

Clicking REQUEST at end for form will complete and submit your request to AP.