Greenphire Patient Payments

Register a Participant

A **Study Coordinator** can register a participant in a study.

Note that a participant can be registered in several studies simultaneously. Also note that a Study Coordinator will only be able to register participants in studies to which they have access in their user profile.

Steps:

1	From Greenphire Patient Payments' Study Coordinator **landing page,** click the **Register Participant** tab to enter the participant's information.
2	On the **Register Participant** page, in the **Participant Information** section, enter the participant's **First Name** and **Last Name** (Required) fields. The First and Last Name entered must match those on the participant's government-issued ID. **Note:** These fields are intended for participant information only. If the participant has a caregiver, additional fields for the caregiver's details will be available in the caregiver sections of the form (refer to **Step 8** in this guide).
3	**In the Associated Studies** section, complete the following fields as described below. Note that the options displayed in the Associated Studies section are determined by the configuration settings chosen during Greenphire Patient Payments setup. Additional fields may appear and be required based on the selected options. • **In the Study** field (Required), select the appropriate study from the dropdown menu provided. You can start typing to narrow the search. • In the **Site** field (Required), select the site from the dropdown provided • In the **Study Status** field (Required), select one of the following values: - **Enrolled** – The participant has been randomized and given a real Subject ID. - **Screening** – The participant has not yet been randomized, and it's still uncertain whether they will pass the screenings to become a participant. - **Washout Period** – Refers to a required time interval between milestones, such as treatments or medications, before proceeding to the next milestone. The assignment of a permanent Subject ID and participant randomization will depend on the specific practices of the study. • In the **Subject ID** field (Required), enter the participant's **Subject ID, patient number**, etc., as dictated by the study's protocol**.** Note that there may be additional validation and formatting requirements for this field. • In the **DPN Attestation** field (Required), check the box to confirm that the participant has consented to participate in the study and that the information entered is accurate to the best of your knowledge. This checkbox is required before you can proceed. • In the **DPN Attestation Date** field (Required), enter the date the attestation was completed. This typically corresponds to the date the participant was enrolled or consented. Use the calendar icon or enter the date in DD-MM-YYYY format. **Note:** The Attestation fields are required for compliance tracking and may be used for audit purposes. Be sure to enter the attestation accurately. Once the above fields have been completed, click **Add Study**. You will be navigated back to the **Participant Registration** page.
4	Next, complete the **Participant Details Required for Tax Purposes** section**.** • The study configuration(s) in which the participant is being enrolled will determine if the **TIN f**ield and/or **Country of Residency** field are displayed in the Participant Details Required for Tax Purposes section. • If applicable, complete the **TIN** field. The **TIN** (Tax Identification Number, equivalent to the Social Security number in the US.) field applies to US and non-US citizens alike. TIN is required if, during study configuration, the sponsor, CRO or site opted for one or more of the following Suvoda services: - **1099 Tax Management Service** - **TIN Validation Service** - **Tax – Backup Withholding** **Note:** If the client is subscribed **only to the 1099 Tax Management Service**, TIN collection is not enforced. In this scenario, if a TIN is not provided, backup withholding will automatically go into effect for this participant. • Complete the **Country of Residency** field**. Country of Residency** is a required field when Country of Residency collection is enabled for a study in which the participant is enrolled. Collection of the participant's Country of Residency will allow Suvoda to provide them with the relevant tax notices and forms.

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	- **US residents**: If the participant is registered with the **United States** selected, the collection of a valid TIN (Tax Identification Number) is required. - **Non-US residents**: If the participant is registered with a **country outside the United States**, the TIN field will not be displayed, but additional action will be required. Please see the Frequently Asked Questions section below for additional information**.**
5	Next, complete the **Participant Address** section**.** • In the **Country** field (Required), please select a country where the participant has their primary residence, typically, a country where the participant will be participating in the study. • In the **Address 1** field (Required), begin typing the address and the Autocomplete service will provide results based on the country specified in the Country field. You may select an address from the list of available options or enter the address manually in the required fields. Note that Address Autocomplete improves the granularity of US-based addresses by capturing details like apartment numbers, buildings, and suite information while increasing the accuracy of international addresses. Validating the address for the US and its territories enhances accuracy and reduces errors by correcting, standardizing, and verifying the input. The validation status displayed allows quick assessment of the accuracy of the address.
6	Complete the **Participant Contact Information**. If the participant would like to opt-in to receive either **email** or **text message** notifications for payment confirmations, balance reminders, and appointment reminders, check the corresponding box(es) and make selections based on the notification preferences. • Enter the **email address and/or primary phone number** • Select a l**anguage** from the dropdown in which the participant would prefer to receive alerts. (Required for text messaging and email notifications) • Select a **time zone** in which the participant resides (Required for text messaging)
7	Complete the **Payment Designee Details**. • From the dropdown, select the option for who will be designated as the payment recipient: - Selecting **Not a minor, not a dependent** will designate the participant as the payment recipient. - Selecting **Minor** will designate the caregiver as the payment recipient by default unless the payment method is a Direct deposit, then the payment recipient can be either the caregiver or the minor. - Selecting **Dependent Over 18** allows the payment recipient to be either the caregiver or the participant.
8	**Date of Birth (DOB) Collection**. The collection of Date of Birth (DOB) serves multiple purposes during participant registration: • **DOB Collection Configuration** – When the "Collect Date of Birth" program configuration is enabled, you will be prompted to enter the DOB of the payment recipient (either the caregiver or the patient) during registration. • **Compliance for ClinCard Payments** – If the study's payment method includes the ClinCard Prepaid Debit Card, banking regulations prohibit minors from receiving payments. To ensure compliance, you must enter the DOB of the payment recipient when assigning the card.
9	If the Caregiver option was selected, the following information should be provided: • **Caregiver Name.** Enter the Caregiver's **First Name** and **Last Name** (both are Required fields). • **Caregiver Address.** If the address is the same as the participant's, check the **Same address as participant** option; otherwise, follow the steps to enter the address as described in **Step 5,** starting at the Address 1 section. • **Caregiver Contact Information.** If the caregiver would like to opt-in to receive either **email** or **text message** notifications for payment confirmations, balance reminders and appointment reminders, check the corresponding box(es) and make selections based on the notification preferences, as described in **Step 6.**
10	**GreenSpace Enrollment and opt-in** GreenSpace is a Suvoda mobile application that enables the payment recipient to submit study-related expense receipts for reimbursements.

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	To opt the recipient into receiving the GreenSpace invitation, check the **Enroll in GreenSpace** option. If an email was not previously provided, you will be prompted to enter one, as it is required for the opt-in process. **Note:** The opt-in section is displayed only for studies that are configured for GreenSpace. Minors are not eligible for enrollment.
11	Once all required and optional fields have been completed, click the **Register Participant** button. The **Participant Information** page for the new participant will be displayed. The right-hand panel of this page will display a menu containing all the tasks you can perform, based on the Greenphire Patient Payments capabilities and the payment methods that were configured by the study sponsor. For example, if milestone and miscellaneous payments have been configured, the **Request Payment** menu item will appear.

Related Topics

Edit a Registered Participant's Information

About the DPN Attestation

Understanding the Participant's Tax Status Certification Experience

Frequently Asked Questions

If my sponsor/CRO/site has subscribed to the Tax Management service and we neglect to provide the participant's TIN, what will occur?	If Suvoda's Tax Service has been activated, but no TINs have been provided, taxes will be withheld from the participant's milestone and miscellaneous payments.
Will providing a TIN always be required?	No, as described in Step 6, above, it depends on the Suvoda services subscribed to, and therefore, will vary on a study-by-study basis.
What action is required if a participant is registered with a non-US Country of Residence?	Upon registration, a link to complete the W-8BEN form will be emailed to the participant if an email address has been provided. If the participant's email address has not been provided, please provide the participant with the link to complete the W-8BEN form (www.greenphire.com/taxform). The W-8BEN form is required by the IRS to determine if backup withholding should apply. **Note:** Milestone and unsubstantiated reimbursement requests will be declined and must be resubmitted after the tax form workflow has been completed. For additional information, please see the Understanding the Participant's Tax Status Certification Experience quick reference guide.
What country should I select in the Country field if the participant is flying into the US from Canada?	In this instance, you should select Canada, since that is where the participant resides.
Will the country I select in the Country field impact the languages in which participant-facing materials will be available?	No, country selection does not impact the languages in which participant-facing materials will be available. That language is specified in the SOW between Suvoda and the client.
What Subject ID should I use when providing the caregiver information when registering a minor?	You should use the participant's Subject ID or the participant's Subject ID with "CG" after it to indicate that a caregiver has been registered. Whether or not the "CG" should be included depends on the preference of the sponsor/CRO.
What if the address wasn't validated?	Address validation isn't required to save the record, but it ensures its accuracy.

Suvoda Support Site:

Suvoda Support

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