



Clincards eForms

Version Date: September 16, 2025

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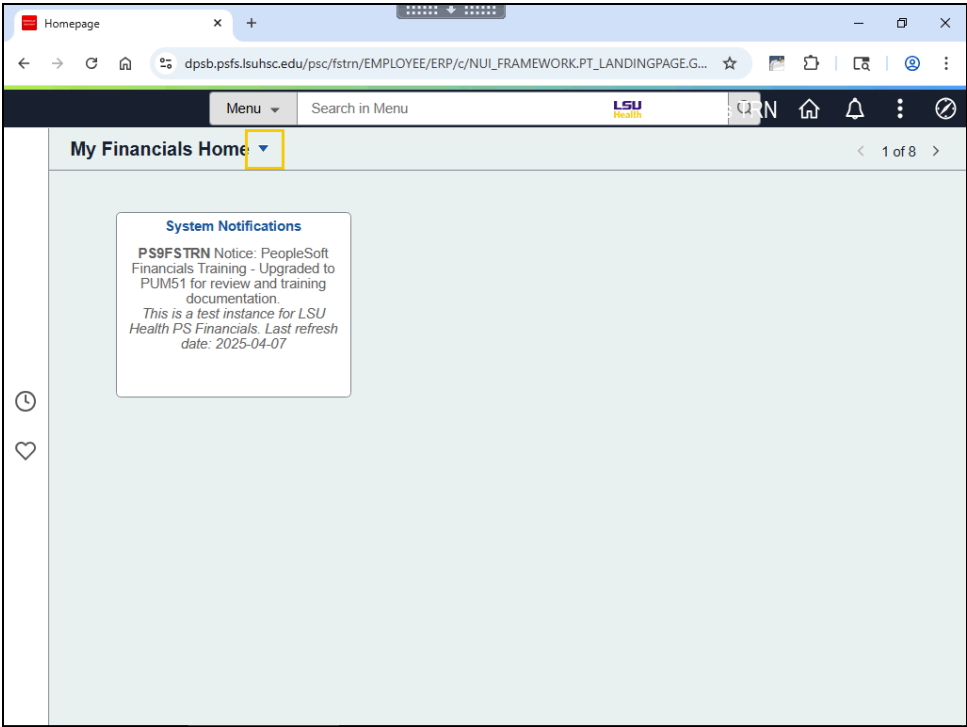
Clincards eForms

Clincard Requests

Submit a Request

Procedure

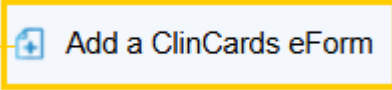
In this topic you will learn to [Submit a Request for Clincards](#).

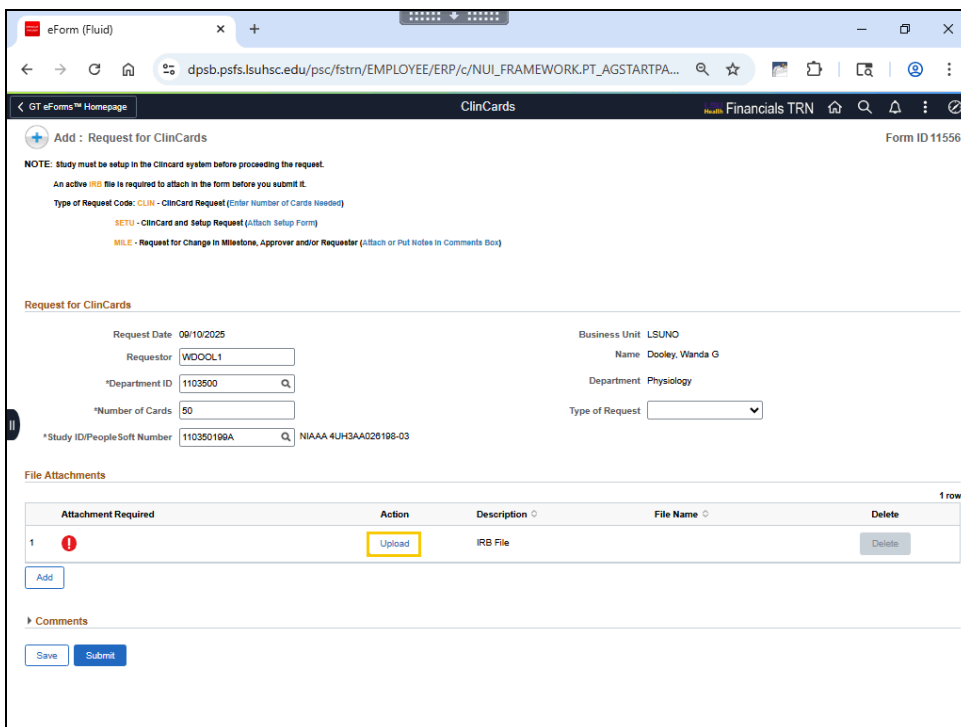


Step	Action
1.	This process allows a streamlined form submission, electronic approvals and recording of the Clincard Requests with department visibility on the form status. Click the button to the right of the My Financials Home field. 
2.	Click the Down button of the scrollbar. 

Training Guide

ClinCards eForms

Step	Action
3.	Click the GT eForms Homepage link. 
4.	Click the ClinCards eForms tile.
5.	Click the Add a ClinCards eForm link. 



eForm (Fluid)

dpsb.psf.slsuhsc.edu/psc/fstny/EMPLOYEE/ERP/c/NUI_FRAMEWORK.PT_AGSTARTPA...

GT eForms™ Homepage ClinCards Financials TRN

Form ID 11556

Add : Request for ClinCards

NOTE: Study must be setup in the ClinCard system before proceeding the request.
An active IRB file is required to attach in the form before you submit it.

Type of Request Code: **CLIN** - ClinCard Request (Enter Number of Cards Needed)
SETU - ClinCard and Setup Request (Attach Setup Form)
MILE - Request for Change in Milestone, Approver and/or Requester (Attach or Put Notes in Comments Box)

Request for ClinCards

Request Date: 09/10/2025
Requestor: WDOOL1
*Department ID: 1103500
*Number of Cards: 50
*Study ID/PeopleSoft Number: 110350199A NIAAA 4UH3AA020198-03
Business Unit: LSUNO
Name: Dooley, Wanda G
Department: Physiology
Type of Request: [v]

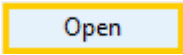
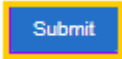
File Attachments

Attachment Required	Action	Description	File Name	Delete
1	Upload	IRB File		Delete

Comments

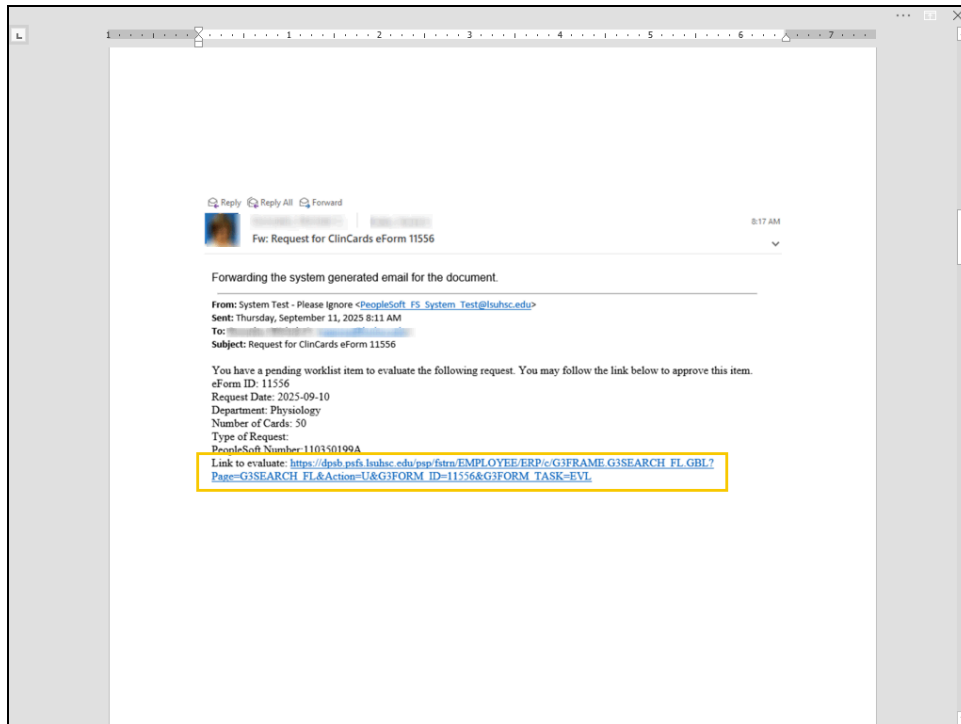
Save Submit

Step	Action
6.	<u>Populate the required data fields:</u> • Department ID • Number of cards • Study ID/Peoplesoft Number (project#) • Attach the IRB • Add comments (optional) Click the Upload button. 

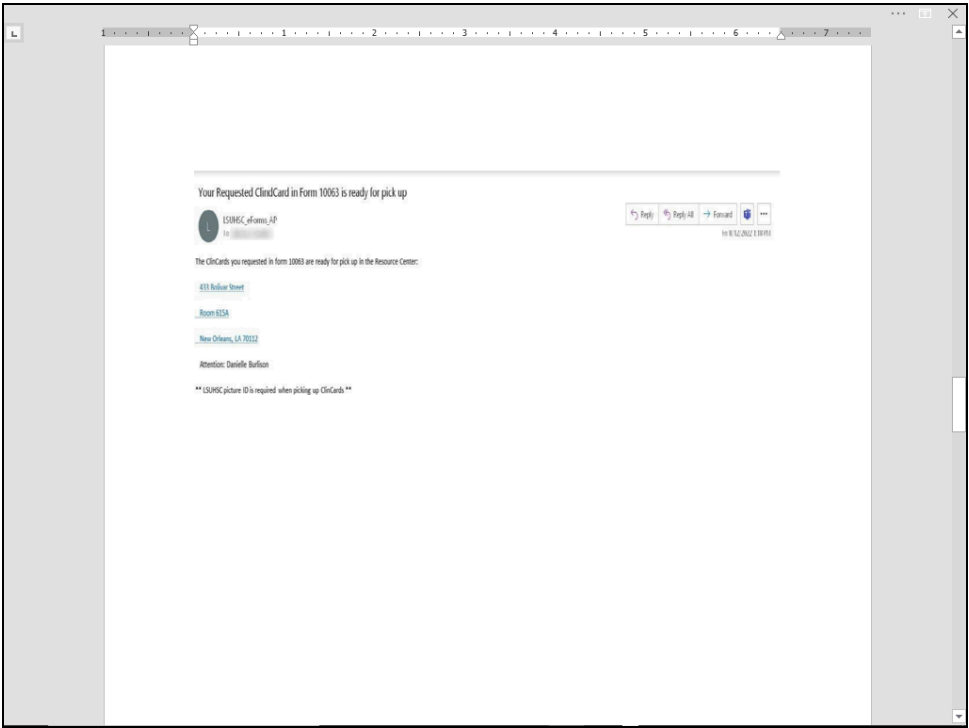
Step	Action
7.	Click the My Device button. 
8.	Click the Desired File link. 
9.	Click the Open button. 
10.	Click the Upload button. 
11.	Click the Done button. 
12.	Adding Comments is optional. If the user would like to add comments, click the Comments link. Click the Submit button. 
13.	The confirmation page displays.

Training Guide

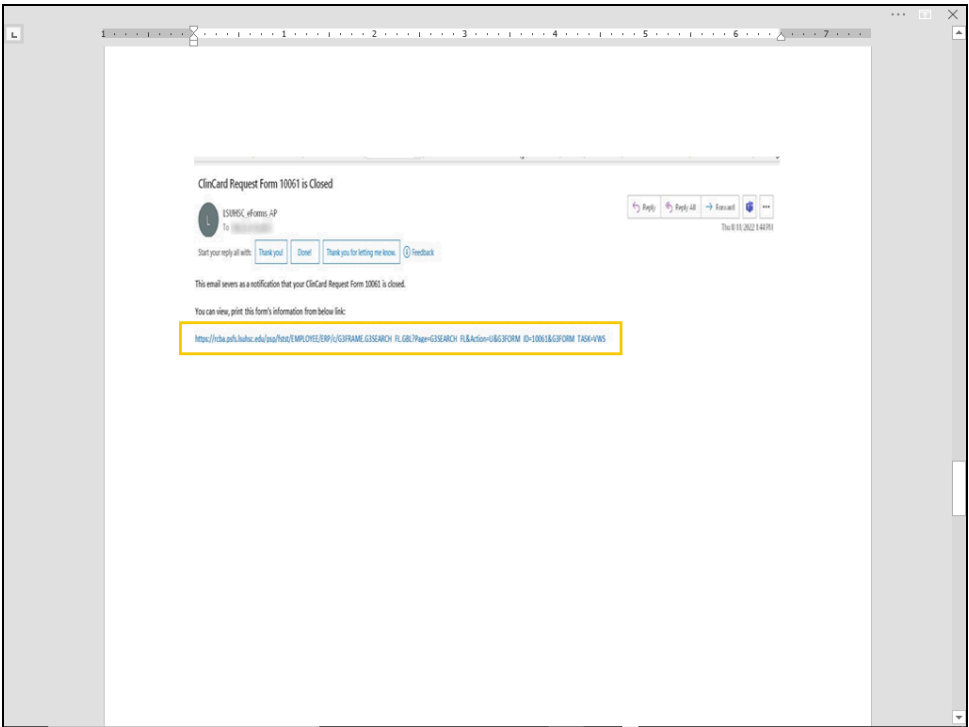
ClinCards eForms



Step	Action
14.	An example of an email notification. Once submitted, the form enters the approval workflow (there are three steps). The Department approver will receive an email and link to approve the request NOTES: Once approved by the department, the form will route to Sponsored Projects Accounting (SPA) for review and approval. Once approved by SPA, the form will route to Accounts Payable for card assignment and disbursement. An email will be sent to the requestor with a notification that the cards are available for pickup in the Resource Center. Click the Link to evaluate link.



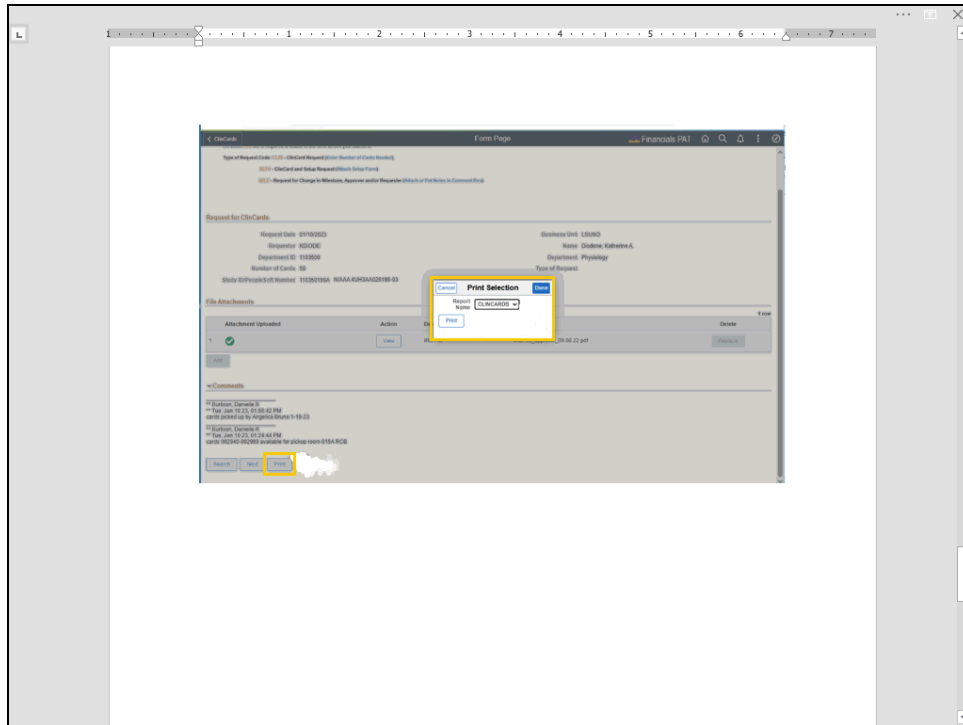
Step	Action
15.	Once the cards are picked up, an email will be generated with a link to print the completed form and approval workflow steps.



Training Guide

Clincards eForms

Step	Action
16.	Click the link in the email to print the form.



Step	Action
17.	Click the Print button in the lower left corner of the screen. The Print Selection box will appear. Select Report Name “CLINCARDS” Click the Print button.

Request for ClinCards

Form ID: 10059 Report Date: 8/8/25

Person Requesting ClinCards KDIODE - Diodene, Katherine A.

Department 1103500 - Physiology

Number of Cards 50

Type of Request

Study ID/PeopleSoft Number 110350199A

Approval Logs

Date	User	Action
2023-01-10-12.06.19.000000	Diodene, Katherine A.	Submitted
2023-01-10-12.09.22.000000	Diodene, Katherine A.	Approved
2023-01-10-12.15.27.000000	Berry Brown, Gloria	Approved
2023-01-10-13.24.44.000000	Burlison, Danielle R	Placed on Hold
2023-01-10-13.56.43.000000	Burlison, Danielle R	Authorized
2023-01-10-13.57.02.000000		Executed

Comments

** Burlison, Danielle R
** Tue, Jan 10 23, 01:56:42 PM
cards picked up by Angelica Bruno 1-10-23

** Burlison, Danielle R
** Tue, Jan 10 23, 01:24:44 PM
cards 002940-002989 available for pickup room 615A RCB

Step	Action
18.	An example of the completed form.

Form Result Financials TRN

Evaluate : Result Form ID 11556

You have successfully approved your eForm.
The eForm has been routed to the next approval step.
multiple approvers.

[View Approval Route](#)

Transaction / Signature Log

Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed
09/10/2025 6:02:02PM	Initiated	WDOOL1	Dooly, Wanda G	Submit	
09/11/2025 8:11:51AM	Resubmitted	MOONZA	Gonzales, Michele S	Resubmit	14 hours 9 minutes
09/11/2025 8:15:13AM	AP_DEPT_HEAD_CLINCARDS	MOONZA	Gonzales, Michele S	Approve	3 minutes

[Refresh Log](#)

[Print](#)

Training Guide

Clincards eForms

Step	Action
19.	Clincard Evaluate Result screen.
20.	This completes <i>Submit a Request for Clincards</i> . End of Procedure.