eSMART Service: General Requests

This quick guide details the submission of an eSMART General Request. General Requests are submitted to request access and for more general study questions. Billing Requests are to correct incorrect charges/bills and modifications are for Billing Plan or Protocol updates.


**Step 1: Navigate to eSMART Service**

1. Hover your mouse over the menu bar on the left side of the eSMART Home page. The menu options will appear.
2. Select eSMART Service to initiate a Service request.
3. Initiate a New Service Request by clicking **New Request**.

**Step 2. Complete Request Basics for General Request Type**

1. Select Type dropdown.
2. Choose the most appropriate General Request from the list within the dropdown.
3. Add a brief, but descriptive, Description of the detail of the request.
4. Select **Add Associated Study** and Choose a study from Study ID dropdown. Your studies will appear in the drop-down list.
5. Select **Add Request Access Delegate** to search for a Person to add as an Access Delegate. Note: Only you can view the status of your Request unless another Study Contact is added here.
6. Select **Save and Continue** to complete Request Basics.
Step 3. Add Supporting Documents

1. Select and choose file to upload to Supporting Documents, as necessary.
2. Select the Type of Supporting Documentation, such as Charges, Claims, Reports, etc.
3. Select Version, either Final or Draft.
4. When complete, select: Save and Continue

Step 4. Review and Submit Service Request

Review the content of your Service Request for accuracy. If you need to make an edit, refer to the Progress Bar:

1. Select Request Basics to edit information entered in Step 2.
2. Select Supporting Documents to edit information entered in Step 3.
3. To complete and submit your General Request to CTBC, select: Submit Request

For general questions about eSMART email CRFSS@Vanderbilt.edu