

ClinCard Reference Guide: Adding and Maintaining Studies

► How to Add a Study

- 1) Login to www.clincard.com
- 2) Click on "Admin"
- 3) Click on "Add Study" button
- 4) Make sure appropriate Program is selected in drop-down box
- 5) Type name of Study in "Name" field
- 6) Click on applicable checkboxes (if SSN, Subject Initials, Subject ID are required fields)
- 7) Click "Submit"

NOTE: This will automatically assign you, the study creator, as a Site Coordinator for this study. However, to assign this study to any other Site Coordinators/Approvers, you will need to go into "Maintain Study Roles"

► How to Maintain Study Payments

In order to create new site payments or modify an existing payment structure:

- 1) Login to www.clincard.com
- 2) Click on "Admin"
- 3) Click on "Maintain Study Payments" button
- 4) Select the study from the drop-down list and click "Edit Study Payment Options"
- 5) Click "Add Option" and a pop-up window will appear, populate "Name" and "Amount" text fields before clicking "Submit"

NOTE: Repeat step for each additional payment

- 6) Once all payments are added, review the order in which they display as this is the same order in which they will appear in the drop-down box

NOTE: You can click on "Up" and "Down" in the third column to adjust the order of a particular payment

- 7) Once all payments are added and appear in the correct order, click "Save Changes"

► How to Maintain Study Role

In order to assign existing users as a Site Coordinator/Approver for particular studies:

- 1) Login to www.clincard.com
- 2) Click on "Admin"
- 3) Click on "Maintain Study Roles" button
- 4) Select appropriate study from the drop-down box and click "Select Study"
- 5) Click on applicable checkboxes for appropriate Site Coordinators/Approvers to be assigned to study
- 6) Click "Save Changes"