



ClinCard Quick Reference Guide

Version 7.3

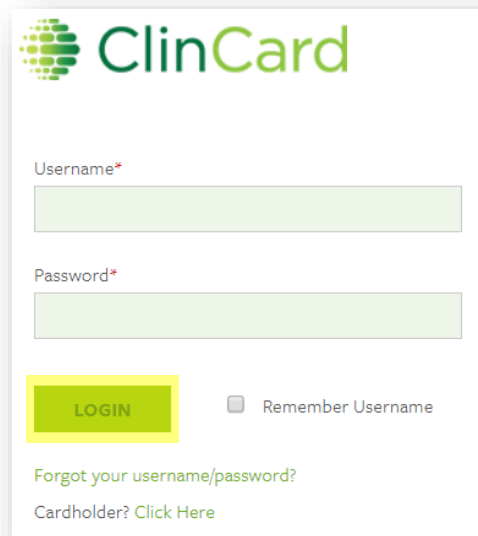
Updated: October 2019

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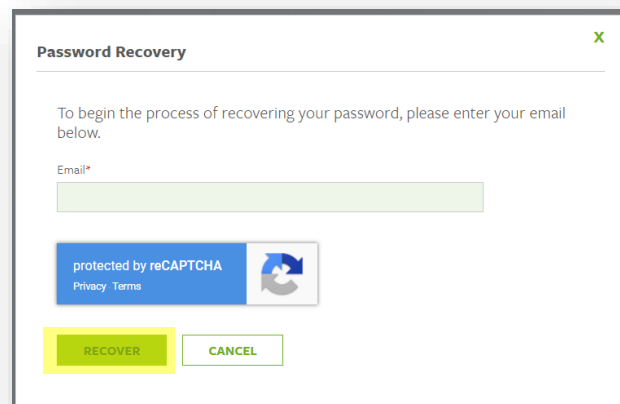
Login to ClinCard

1. Login to www.clincard.com.
2. Enter your username and password. *Your login credentials are case sensitive.



The image shows the ClinCard login page. At the top left is the ClinCard logo. Below it are two input fields: "Username*" and "Password*", both with asterisks indicating they are required. Below the password field is a yellow "LOGIN" button. To the right of the button is a checkbox labeled "Remember Username". Below the login button are two links: "Forgot your username/password?" and "Cardholder? Click Here".

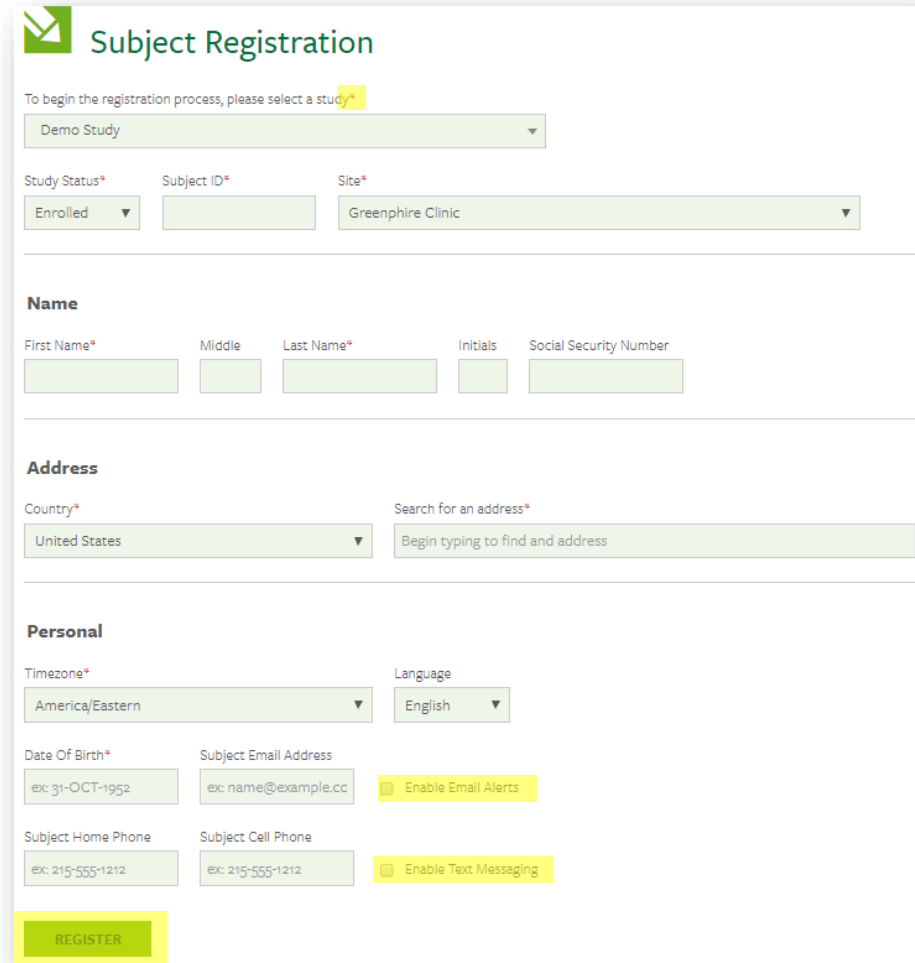
3. If you have difficulty logging in, click **Forgot your username/password?**. Enter your email address and click **Recover**.
 - a This will instantly send you an email with a link that allows you to reset your password.
 - b You can also call our site support team:
 - i Local United States/Canada: (215) 609.4378
 - ii United States Toll Free Number: (844) 847.0107



The image shows a "Password Recovery" form. At the top left is the title "Password Recovery" with a close button (X) on the right. Below the title is a message: "To begin the process of recovering your password, please enter your email below." Below this is an "Email*" input field. Below the input field is a blue button labeled "protected by reCAPTCHA" with a "Privacy Terms" link and a reCAPTCHA logo. At the bottom are two buttons: a yellow "RECOVER" button and a white "CANCEL" button.

Register a Subject

1. Login to www.clincard.com.
2. Click the **Register Subject** tab.
3. Select the appropriate Study from the drop-down menu.
4. Enter the information into the form. Fields denoted with a red asterisk (*) are required.
 - a. Please note entering a PO Box for the subject's address may result in delays in retrieving subject's PIN.



Subject Registration

To begin the registration process, please select a study*

Demo Study

Study Status* Subject ID* Site*

Enrolled [] Greenphire Clinic

Name

First Name* Middle Last Name* Initials Social Security Number

[] [] [] [] []

Address

Country* Search for an address*

United States [] Begin typing to find and address

Personal

Timezone* Language

America/Eastern [] English []

Date Of Birth* Subject Email Address

ex: 31-OCT-1952 ex: name@example.cc Enable Email Alerts

Subject Home Phone Subject Cell Phone

ex: 215-555-1212 ex: 215-555-1212 Enable Text Messaging

REGISTER

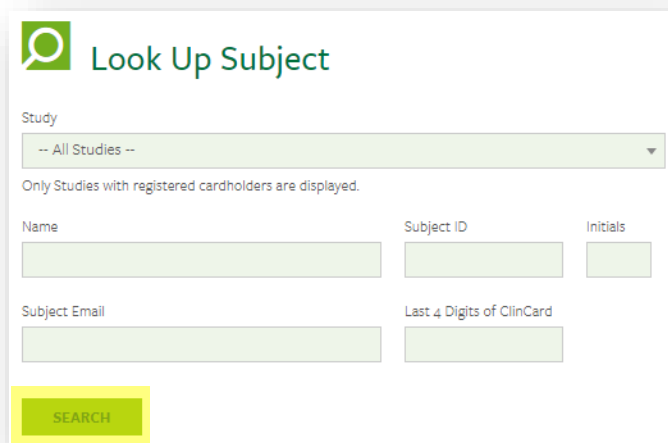
- b. If you would like the Subject to receive payment confirmations or appointment reminders, select the “Enable Email Alerts” and “Enable Text Messaging” checkboxes.
5. Click **Register**.

- You will be brought to the “Subject Information” screen where you can assign a card number, make a payment, schedule an appointment reminder, replace a ClinCard or edit a Subject’s information.

The screenshot shows the 'Subject Information' screen for a 'DEMO TESTER'. At the top, there are two tabs: 'SUBJECT INFORMATION' (highlighted in yellow) and 'AUDIT HISTORY'. The main content area is divided into three columns. The left column contains subject details: 'Study Name' (Demo Study), 'Subject ID' (789456), and 'No card assigned.'. The middle column lists various attributes: 'Study status' (Enrolled), 'Address' (630 Allendale Road, King of Prussia, PA 19406), 'Timezone' (America/New_York), 'Home Phone' (---), 'Cell Phone' (2155551212), 'Allow Text Messages' (No), and 'Allow Email' (No). The right column is a yellow sidebar with action buttons: 'ASSIGN CLINCARD', 'REQUEST PAYMENT', 'REQUEST REIMBURSEMENT', 'CREATE TRAVEL PROFILE', 'EDIT SUBJECT', and 'SCHEDULE APPOINTMENT'. A 'Recent Activity' section on the right shows: 'Cardholder Demo Tester has enrolled in study Demo Study with status Enrolled' and 'Created new subject Demo Tester'.

Look Up a Previously Registered Subject

1. Login to www.clincard.com.
2. Click the **Look Up Subject** tab.
3. Enter one of the following pieces of information:
 - a. First name and/or last name
 - b. Subject ID
 - c. Subject's initials
 - d. Subject's email
 - e. Last four (4) digits of ClinCard
4. Click **Search**.



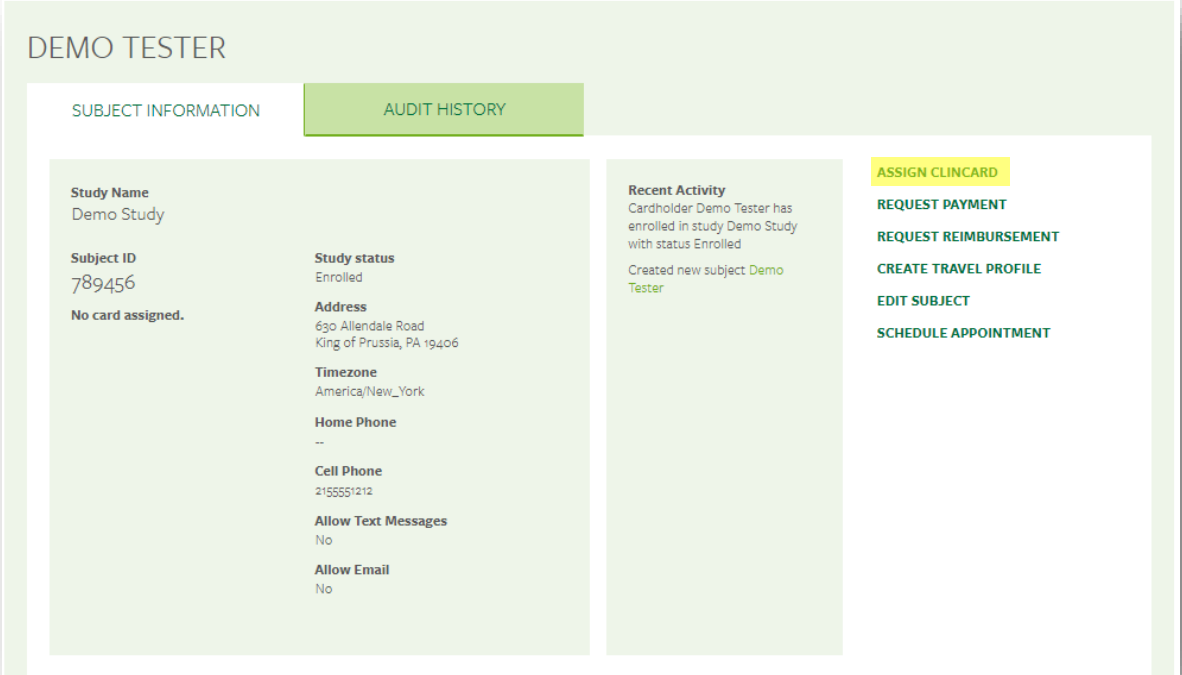
5. Results will appear below the “Search Results” header.
6. Click the hyperlink **Last Name** of the Subject.

LAST NAME	FIRST NAME	LAST FOUR	LOCATION	STUDY	ID
Tester	Demo	None	Greenphire Clinic	Demo Study	789456

Assign a ClinCard

Once you have selected an existing Subject or registered a new Subject, you will be brought to the “Subject Information” screen. On the right-hand side of the screen, you will see options that represent the actions you can perform on the Subject.

1. Click **Assign ClinCard** and a pop-up screen will appear.



DEMO TESTER

SUBJECT INFORMATION **AUDIT HISTORY**

Study Name
Demo Study

Subject ID
789456

No card assigned.

Study status
Enrolled

Address
630 Allendale Road
King of Prussia, PA 19406

Timezone
America/New_York

Home Phone
--

Cell Phone
2155551212

Allow Text Messages
No

Allow Email
No

Recent Activity
Cardholder Demo Tester has enrolled in study Demo Study with status Enrolled
Created new subject Demo Tester

ASSIGN CLINCARD

REQUEST PAYMENT

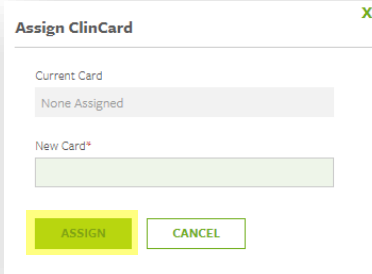
REQUEST REIMBURSEMENT

CREATE TRAVEL PROFILE

EDIT SUBJECT

SCHEDULE APPOINTMENT

2. In the “New Card” field, enter the token number visible through the window of the ClinCard card package.
 - a. Note: Do not open the envelope prior to providing to the Subject. The token number is different than the 16-digit card number.
3. Click **Assign**.



Assign ClinCard X

Current Card
None Assigned

New Card*
[Empty field]

ASSIGN **CANCEL**

4. Once the card has successfully been assigned, you will receive a confirmation message at the top of the “Subject Information” screen.

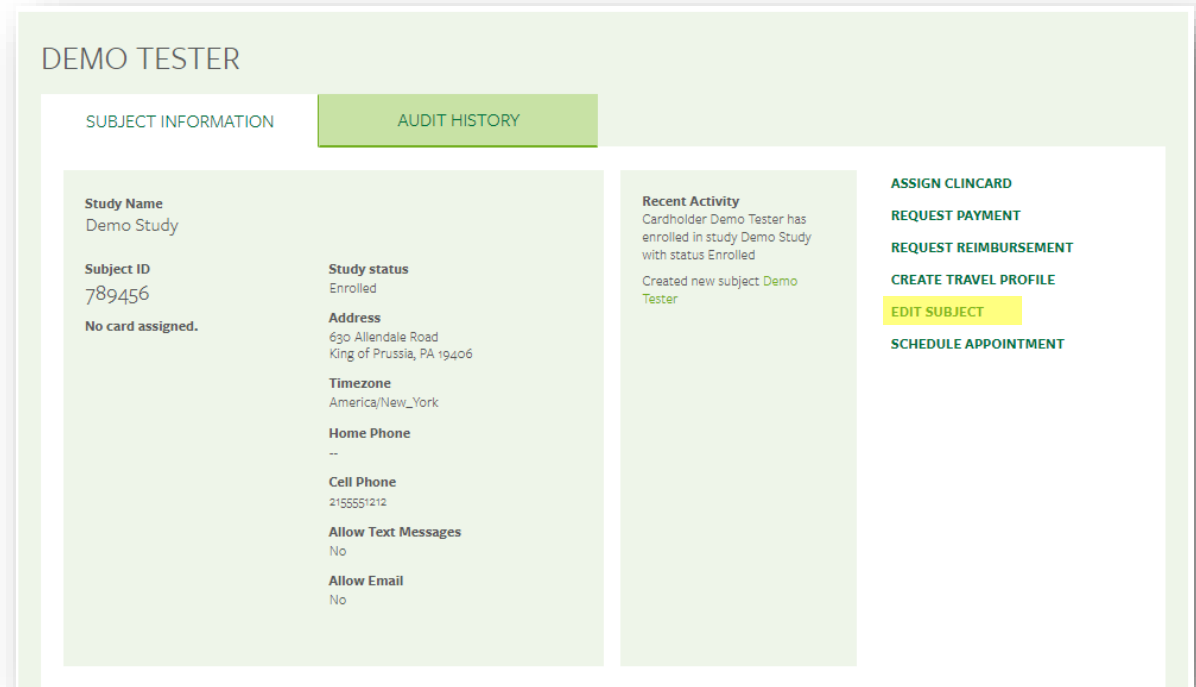
Success! The new card has been successfully assigned to Demo Tester. The new card will be active within 10 minutes. X

5. Now an option to “Replace ClinCard” appears.
6. In the event that a Subject loses their card, you can replace that card for them by clicking **Replace ClinCard**, and following the steps above, using the token number from a new ClinCard card package
 - a The “Replace ClinCard” process will immediately inactivate the lost card and automatically transfer any available/pending balance to the newly assigned ClinCard

Add a New Study to an Existing Subject

Once you have selected an existing subject in the system, you will be brought to the “Subject Information” screen. On the right-hand side of the screen, you will see options that represent all of the actions you can perform on the Subject.

1. Click **Edit Subject**.



The screenshot shows the 'DEMO TESTER' subject information screen. The 'EDIT SUBJECT' button is highlighted in yellow. The screen is divided into several sections:

- SUBJECT INFORMATION** (selected tab):
 - Study Name:** Demo Study
 - Subject ID:** 789456
 - No card assigned.**
 - Study status:** Enrolled
 - Address:** 630 Allendale Road, King of Prussia, PA 19406
 - Timezone:** America/New_York
 - Home Phone:** --
 - Cell Phone:** 2155551212
 - Allow Text Messages:** No
 - Allow Email:** No
- AUDIT HISTORY** (tab):
 - Recent Activity:** Cardholder Demo Tester has enrolled in study Demo Study with status Enrolled. Created new subject Demo Tester.
- Actions:**
 - ASSIGN CLINCARD
 - REQUEST PAYMENT
 - REQUEST REIMBURSEMENT
 - CREATE TRAVEL PROFILE
 - EDIT SUBJECT** (highlighted)
 - SCHEDULE APPOINTMENT

2. Click the **Add Study** hyperlink under the Study Membership section.

Study Membership



The screenshot shows the 'Study Membership' section with the following fields and values:

- Study*:** Demo Study (dropdown menu)
- Subject ID*:** 789456 (text input)
- Subject Status*:** Enrolled (dropdown menu)

Below the fields is a yellow button labeled **+ ADD STUDY**.

3. Select the Study from the drop-down menu, enter the new Subject ID, and select the Subject status.
4. Confirm Name, Address and all personal information.
5. Click **Save**.
 - a. When making payments for a Subject registered to multiple studies, you may be prompted to select the appropriate study before making a payment

Request a Payment

1. Click **Request Payment** and pop-up screen will appear

The screenshot shows the 'DEMO TESTER' subject information page. It has two tabs: 'SUBJECT INFORMATION' and 'AUDIT HISTORY'. The 'SUBJECT INFORMATION' tab is active and displays the following details:

- Study Name:** Demo Study
- Subject ID:** 789456
- No card assigned.**
- Study status:** Enrolled
- Address:** 630 Allendale Road, King of Prussia, PA 19406
- Timezone:** America/New_York
- Home Phone:** --
- Cell Phone:** 2155551212
- Allow Text Messages:** No
- Allow Email:** No

On the right side, there is a 'Recent Activity' section and a list of actions under 'ASSIGN CLINICARD':

- Recent Activity:** Cardholder Demo Tester has enrolled in study Demo Study with status Enrolled. Created new subject: Demo Tester.
- ASSIGN CLINICARD actions:** REQUEST PAYMENT (highlighted in yellow), REQUEST REIMBURSEMENT, CREATE TRAVEL PROFILE, EDIT SUBJECT, SCHEDULE APPOINTMENT.

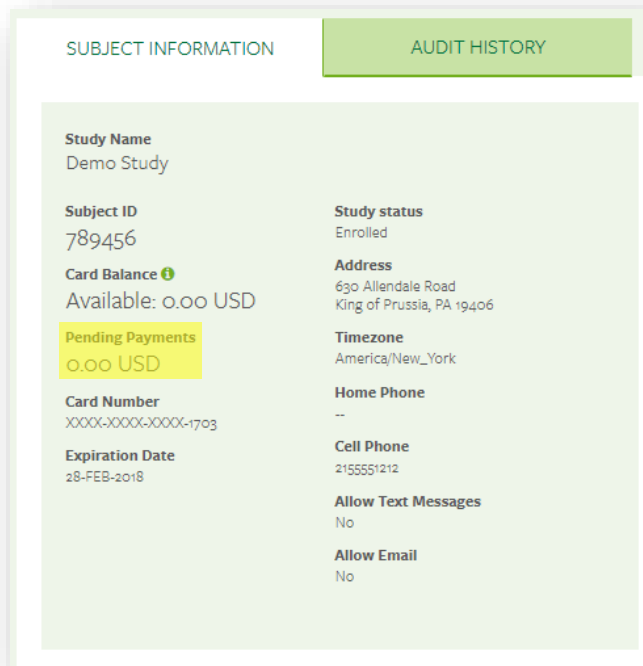
2. Select the milestone the subject is being paid.
3. Add any Notes (not required).

The screenshot shows the 'Request Payment' pop-up screen. It contains the following fields and options:

- To:** Demo Tester
- Study:** Demo Study
- Milestone:*** Screening : 5.00 USD (highlighted in yellow)
- Total Payment:** 5.00 USD
- Notes:** A text area for adding notes.
- Buttons:** PAY (highlighted in yellow), MISSED, N/A, CANCEL.

4. Click **Pay**.

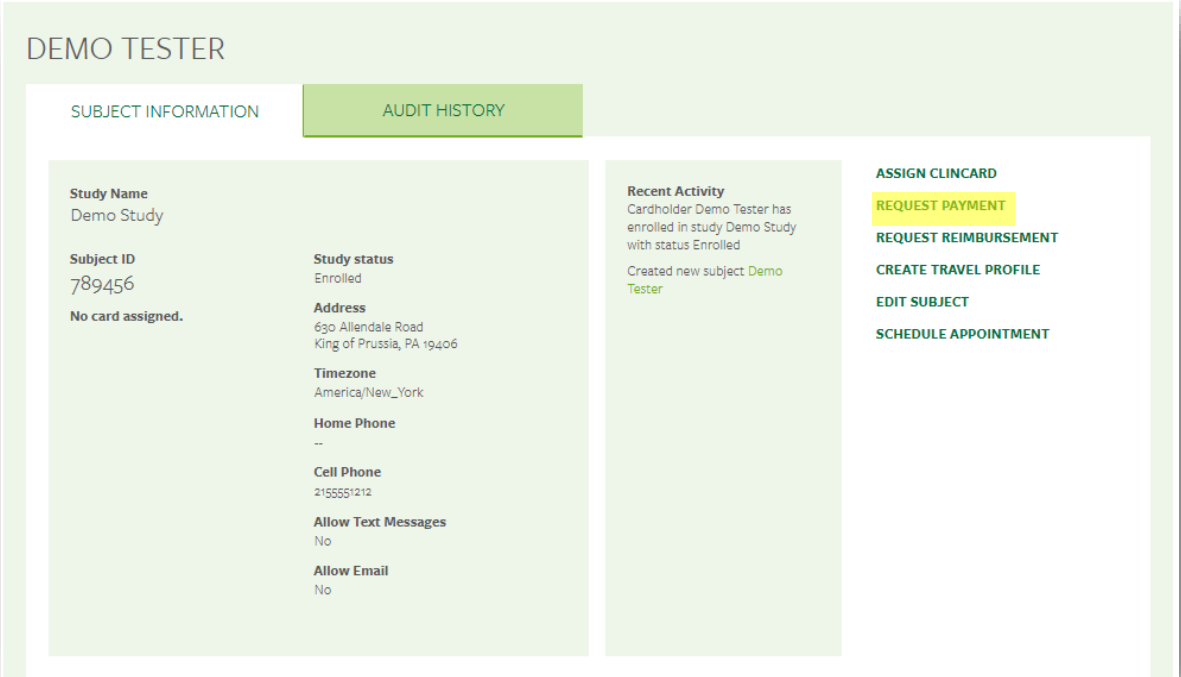
- a When a payment has successfully been requested, the “Pending Payments” area of the “Subject Information” screen will reflect the payment. It will also be reflected in your “Recent Activity” in the middle of the screen.
- b When a payment has been approved and processed, the amount will be removed from the “Pending Payments” area and will now be reflected in the “Card Balance” area.



- 5. If the Subject has opted to receive email and/or text messages, the Subject will receive a payment confirmation communication

Make a Miscellaneous Payment

1. Click **Request Payment** and a pop-up screen will appear

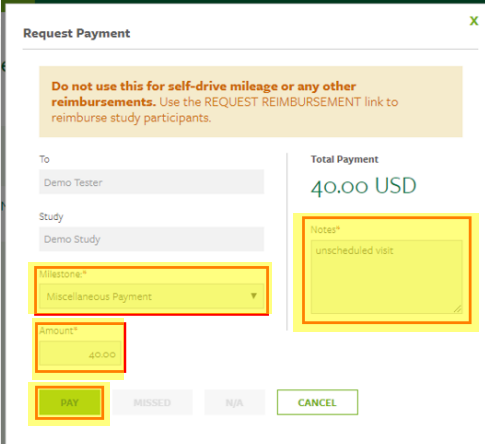


The screenshot shows the 'DEMO TESTER' subject profile page. It has two tabs: 'SUBJECT INFORMATION' and 'AUDIT HISTORY'. The 'SUBJECT INFORMATION' tab is active and displays the following details:

- Study Name:** Demo Study
- Subject ID:** 789456
- No card assigned.**
- Study status:** Enrolled
- Address:** 630 Allendale Road, King of Prussia, PA 19406
- Timezone:** America/New_York
- Home Phone:** --
- Cell Phone:** 2155551212
- Allow Text Messages:** No
- Allow Email:** No

On the right side, there is a 'RECENT ACTIVITY' section showing: 'Cardholder Demo Tester has enrolled in study Demo Study with status Enrolled' and 'Created new subject Demo Tester'. Below this is an 'ASSIGN CLINCARD' section with a list of actions: 'REQUEST PAYMENT' (highlighted in yellow), 'REQUEST REIMBURSEMENT', 'CREATE TRAVEL PROFILE', 'EDIT SUBJECT', and 'SCHEDULE APPOINTMENT'.

2. Select “**Miscellaneous Payment**” in the milestones drop-down menu.
3. Enter the payment value in the “Amount” field.
4. Add an appropriate comment in the “Note” field, e.g., *Unscheduled Visit*, etc.
5. Click **Pay**.



The screenshot shows the 'Request Payment' pop-up form. It includes a warning message: 'Do not use this for self-drive mileage or any other reimbursements. Use the REQUEST REIMBURSEMENT link to reimburse study participants.' The form fields are as follows:

- To:** Demo Tester
- Study:** Demo Study
- Milestone*:** Miscellaneous Payment (highlighted in yellow)
- Amount*:** 40.00 (highlighted in yellow)
- Total Payment:** 40.00 USD
- Notes*:** unscheduled visit (highlighted in yellow)

At the bottom, there are four buttons: 'PAY' (highlighted in yellow), 'MISSED', 'N/A', and 'CANCEL'.

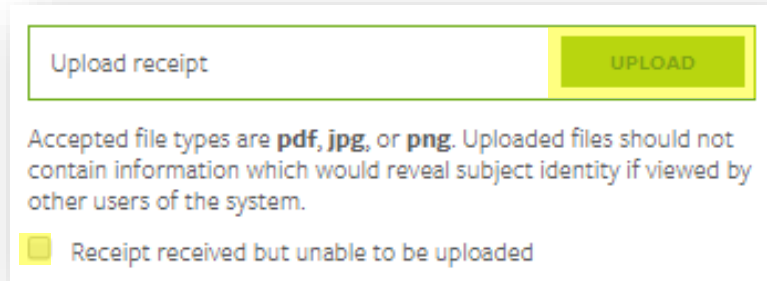
Request a Reimbursement and Receipt Upload

1. Click **Request Reimbursement** and a pop-up screen will appear.

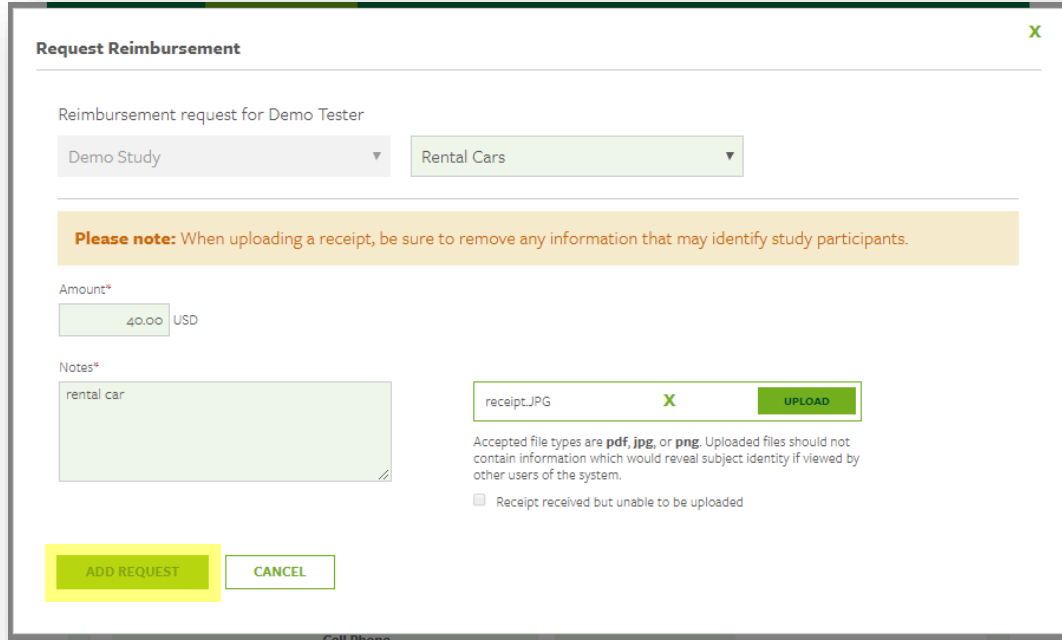
2. Select the milestone (if applicable) and reimbursement from the milestones drop-down menu.
 - a. Reimbursement options will show applicable to your study ONLY.

- b. Reimbursements can be associated with specific milestones. The list of milestones will come from the preset study payments maintained by the Study Admin or by Greenphire.

- c A milestone will display in the drop-down even if payout for the milestone payment has not yet occurred. Additionally, the same milestone can be reused to associate with multiple reimbursements.
 - d When a milestone is selected, it will be shown on the Audit History page, Payment Approvals page, and the Payment Detail Report.
3. To upload the receipt associated with this request, click **Upload**.
- a Check the box if you are unable to upload the receipt for any reason, Greenphire assumes you will keep the receipt on file for that reimbursement.



- b As soon as the file is accepted, you will see “Upload receipt” change to the file name.
4. Click **Add Request**.






5. Once all reimbursements have been entered, click **Submit Request**.

Request Reimbursement X

Reimbursement request for Demo Tester

Demo Study Select a Reimbursement Type

OTHER REIMBURSEMENT		5.00 USD 
Notes: meal	Receipt: Receipt received but unable to be uploaded	
TAXI/RIDESHARE		10.00 USD 
Notes: taxi	Receipt: Receipt received but unable to be uploaded	
RENTAL CARS		40.00 USD 
Notes: rental car	Receipt: receipt.JPG	

SUBMIT REQUEST CANCEL

TOTAL **55.00 USD**

- Once the reimbursement has been successfully submitted, you will receive a confirmation message at the top of the “Subject Information” screen.

Request Drive/Mileage Reimbursement

1. After clicking **Request Reimbursement**, selecting an associated **Milestone**, reimbursement options will show applicable to your study ONLY.

Request Reimbursement X

Reimbursement request for Test Subject

[REDACTED]

Screening Visit (if consent signed)

Drive/Mileage

Please note: Be sure to remove any information from the Notes field that may reveal the identity of the study participant.

Starting Address

Country*

United States

Search for an address (Default is home address)

123 South Broad Street Philadelphia Pennsylvania

123 South Broad Street
 Philadelphia, PA 19109
 USA

Ending Address

Country*

United States

Search for an address (Default is site address)

Begin typing to find an address

1018 West 9th Avenue
 King of Prussia, PA 19406
 USA

Travel Date

dd-M-YYYY

Round Trip

Notes*

[Empty Note Field]

The estimated travel distance is 21.9 miles

ADD REQUEST

CANCEL

2. **Starting Address** will be pre-populated with the Subject's address entered in while creating their profile. This can be changed by editing the "search for an address" line (powered by Google).
3. **Ending Address** will be pre-populated with the Site's address setup by Greenphire. This can be changed by editing the "search for an address" line (powered by Google).
4. Click **Travel Date** to enter the date of travel (Required field).
5. Enter the required note into the **Note** field.
 - a. Note: Be sure to remove any information from the Notes field that may reveal the identity of the study participant.
6. The estimated travel distance will auto-calculate (powered by Google).
 - a. Note: Per mile rate is set by the sponsor.

Request Reimbursement X

Reimbursement request for Test Subject

Screening Visit (if consent signed) ▾

Drive/Mileage ▾

Please note: Be sure to remove any information from the Notes field that may reveal the identity of the study participant.

<p>Starting Address</p> <p>Country* <input type="text" value="United States"/> ▾</p> <p>Search for an address (Default is home address) <input type="text" value="123 South Broad Street Philadelphia Pennsylvania"/></p> <p>123 South Broad Street Philadelphia, PA 19109 USA</p>	<p>Ending Address</p> <p>Country* <input type="text" value="United States"/> ▾</p> <p>Search for an address (Default is site address) <input type="text" value="1018 W. 9th Ave King of Prussia Pennsylvania"/></p> <div style="background-color: #f9e79f; padding: 5px; margin: 5px 0;"> The address provided does not directly match with the Google-verified location. The address below will be used. </div> <p>1018 West 9th Avenue King of Prussia, PA 19406 USA</p>	<p>Travel Date <input type="text" value="19-Sep-2019"/></p> <p><input checked="" type="checkbox"/> Round Trip</p> <p>Notes* <input type="text" value="Note A"/></p>
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The estimated travel distance is ▾ round trip

7. Add Request will become available to click once all required fields are entered.
8. Click **Add Request**.

Request Reimbursement X

Reimbursement request for Test Subject

Screening Visit (if consent signed) ▼

Select a Reimbursement Type ▼

DRIVE/MILEAGE 23.90 USD 🛒

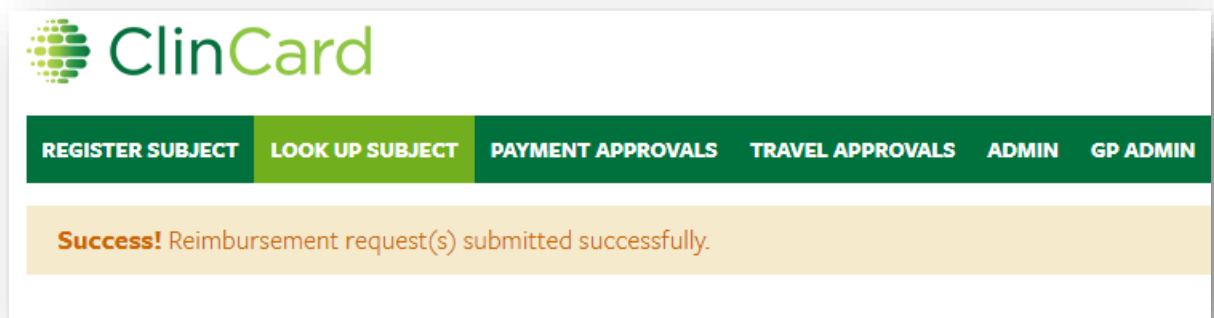
Start Address:	End Address:	Total Distance:	Appointment Date:	Milestone:	Notes:
123 South Broad Street Philadelphia, PA 19109 USA	1018 West 9th Avenue King of Prussia, PA 19406 USA	43.9 miles Roundtrip: Yes	19-SEP-2019	Screening Visit (if consent signed)	Note A

SUBMIT REQUEST

CANCEL

TOTAL **23.90 USD**

9. Once all reimbursements have been entered, click **Submit Request**.



10. Once the reimbursement has been successfully submitted, you will receive a confirmation message at the top of the “Subject Information” screen.

Setup an Appointment Reminder

1. Click **Schedule Appointment** and a pop-up menu will appear.

The screenshot shows the 'DEMO TESTER' subject information page. It features two tabs: 'SUBJECT INFORMATION' (selected) and 'AUDIT HISTORY'. The 'SUBJECT INFORMATION' tab is divided into three columns:

- Left Column:**
 - Study Name: Demo Study
 - Subject ID: 789456
 - No card assigned.
- Middle Column:**
 - Study status: Enrolled
 - Address: 630 Allendale Road, King of Prussia, PA 19406
 - Timezone: America/New_York
 - Home Phone: --
 - Cell Phone: 2155551212
 - Allow Text Messages: No
 - Allow Email: No
- Right Column:**
 - Recent Activity: Cardholder Demo Tester has enrolled in study Demo Study with status Enrolled. Created new subject Demo Tester.
 - ASSIGN CLINCARD
 - REQUEST PAYMENT
 - REQUEST REIMBURSEMENT
 - CREATE TRAVEL PROFILE
 - EDIT SUBJECT
 - SCHEDULE APPOINTMENT** (highlighted in yellow)

2. Use the date and time picker to enter the Subject's next appointment.
3. Click **Schedule**

The screenshot shows the 'Schedule Appointment' pop-up menu. It contains the following fields and options:

- Title: Schedule Appointment (with a close 'X' button)
- Text: Schedule next appointment for Demo Tester
- Study: Demo Study (dropdown menu)
- Appointment Date*: 26-Apr-2018
- Appointment Time*: 11 : 30 AM (with time pickers and AM/PM dropdown)
- Text: All times are as of the site's time zone: America/New_York
- Buttons: SCHEDULE (highlighted in yellow) and CANCEL

4. The appointment has been stored and will appear at the bottom of the "Subject Information" screen under the header "Upcoming Appointments".

Upcoming Appointments Time zone: America/New_York

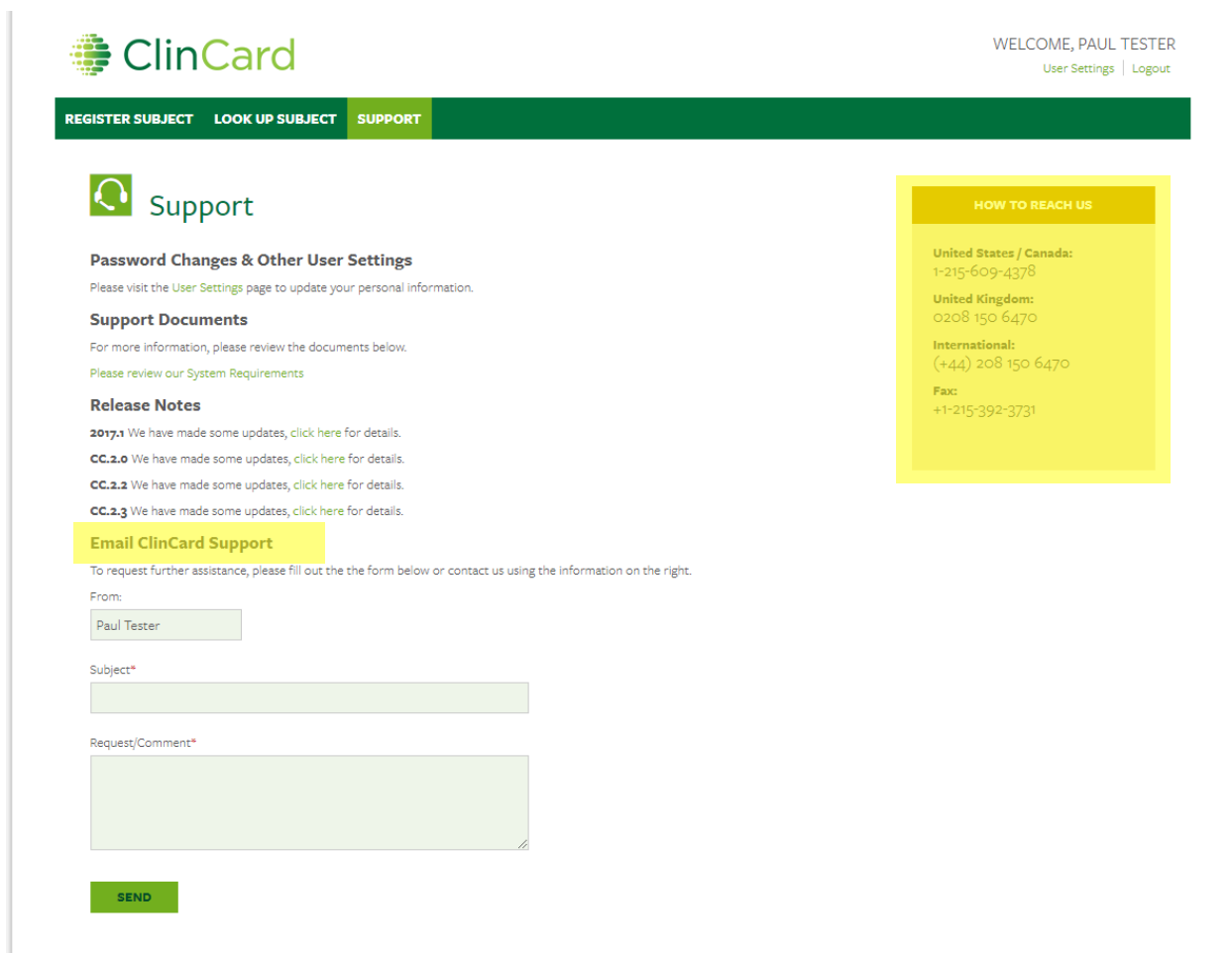
DATE	DAY	TIME	STUDY	SCHEDULED BY	
26-APR-2018	Thursday	11:30 AM	Demo Study	Paul Tester	CHANGE CANCEL

- a If the Subject has opted to receive email and/or text messages, they will receive a communication reminder three days and one day prior to the Subject's next appointment.

Request Assistance

If you have questions about using ClinCard or how it has been set up for your studies, reach out to the ClinCard Site Success team:

1. Submit an email request through the “Support” link on the ClinCard portal.
2. Email us at support@greenphire.com.
3. Call our Site Success team between the hours of 4:00AM and 10:00PM EST (Monday through Friday)
 - a. Local United States/Canada (215) 609.4378
 - b. Toll Free (844) 847.0107



The screenshot shows the ClinCard user interface. At the top left is the ClinCard logo. At the top right, it says "WELCOME, PAUL TESTER" with links for "User Settings" and "Logout". Below this is a navigation bar with three tabs: "REGISTER SUBJECT", "LOOK UP SUBJECT", and "SUPPORT" (which is highlighted). The main content area is titled "Support" with a headset icon. It contains several sections: "Password Changes & Other User Settings" with a link to update personal information; "Support Documents" with a link to system requirements; and "Release Notes" with links for versions 2017.1, CC.2.0, CC.2.2, and CC.2.3. A yellow box titled "Email ClinCard Support" contains a form with fields for "From:" (pre-filled with "Paul Tester"), "Subject*", and "Request/Comment*", and a "SEND" button. To the right of the form is a yellow box titled "HOW TO REACH US" containing contact information for the United States/Canada, United Kingdom, and International, along with a fax number.