ClinCard Quick Reference Guide

Version 7.3
Updated: October 2019

Table of Contents
Login to ClinCard........................................................................................................1
Register a Subject ....................................................................................................... 2
Look Up a Previously Registered Subject ................................................................. 4
Assign a ClinCard ...................................................................................................... 5
Add a New Study to an Existing Subject .................................................................... 7
Request a Payment ..................................................................................................... 8
Make a Miscellaneous Payment .................................................................................. 10
Request a Reimbursement and Receipt Upload ......................................................... 11
Request Drive/Mileage Reimbursement .................................................................... 14
Set an Appointment Reminder .................................................................................... 17
Request Assistance .................................................................................................... 19
Login to ClinCard


2. Enter your username and password. *Your login credentials are case sensitive.

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
Register a Subject

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.
   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.
6. 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.
Look Up a Previously Registered Subject

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.

![Look Up Subject](image_url)
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.

2. In the “New Card” field, enter the token number visible through the window of the ClinCard card package.
   - 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**.
4. Once the card has successfully been assigned, you will receive a confirmation message at the top of the “Subject Information” screen.

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**.

![Subject Information Screen](image)

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

**Study Membership**

<table>
<thead>
<tr>
<th>Study</th>
<th>Subject ID</th>
<th>Subject Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demo Study</td>
<td>789456</td>
<td>Enrolled</td>
</tr>
</tbody>
</table>

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

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

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

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.
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.

   ![Upload receipt](image)

   - Accepted file types are `pdf`, `jpg`, or `png`. Uploaded files should not contain information which would reveal subject identity if viewed by other users of the system.
   - Receipt received but unable to be uploaded

   b. As soon as the file is accepted, you will see “Upload receipt” change to the file name.

4. Click **Add Request**.

   ![Request Reimbursement](image)

   - **Reimbursement request for Demo Tester**
   - **Demo Study**
   - **Rental Cars**

   **Please note:** When uploading a receipt, be sure to remove any information that may identify study participants.

   - **Amount:** $100.00
   - **Note:** rental car

   ![Receipt](image)

   - Accepted file types are `pdf`, `jpg`, or `png`. Uploaded files should not contain information which would reveal subject identity if viewed by other users of the system.
   - Receipt received but unable to be uploaded

5. Once all reimbursements have been entered, click **Submit Request**.
6. 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.

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

2. Use the date and time picker to enter the Subject’s next appointment.

3. Click **Schedule**

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