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ClinCard®

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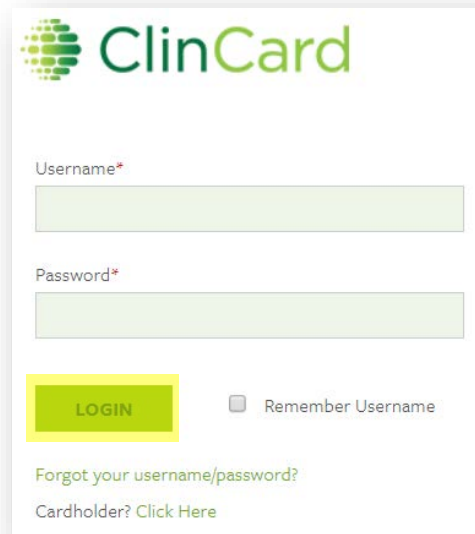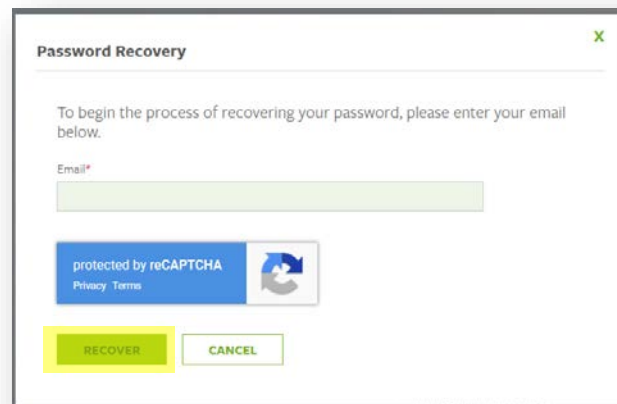# ClinCard Quick Reference Guide

Version 7.0
Updated: June 2018

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Login to ClinCard

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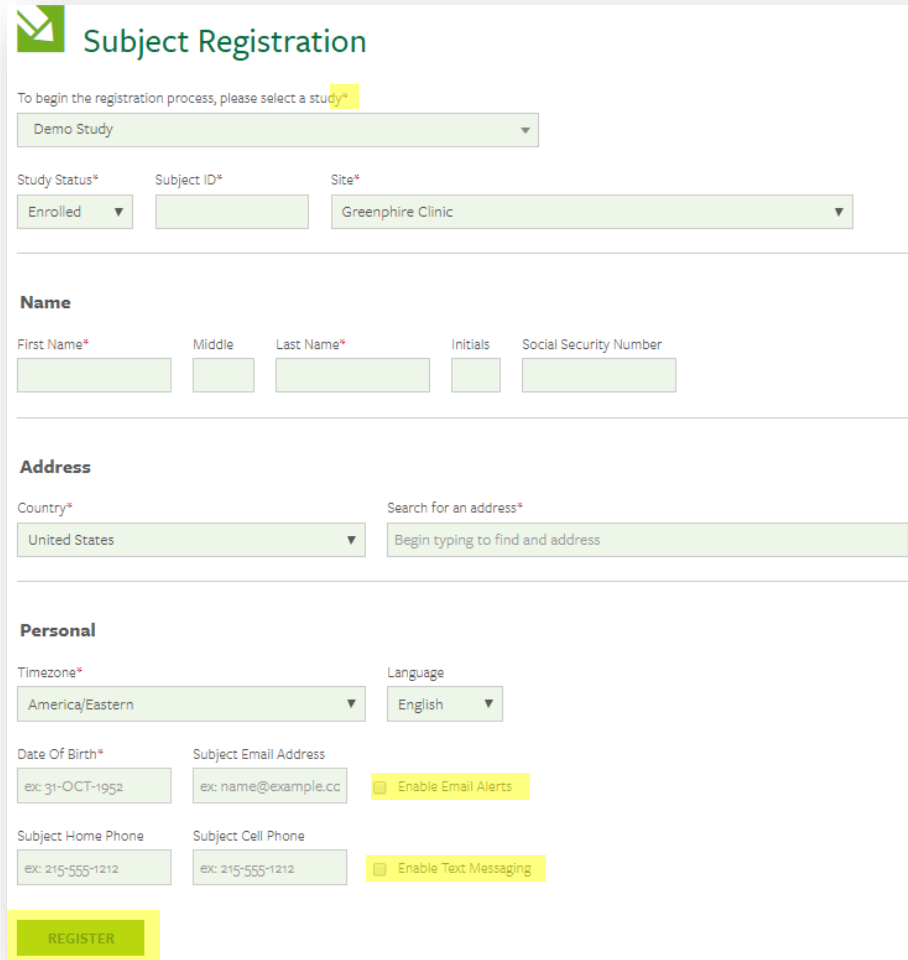   2. Enter your username and password. *****Your login credentials are case sensitive.

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

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. 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.
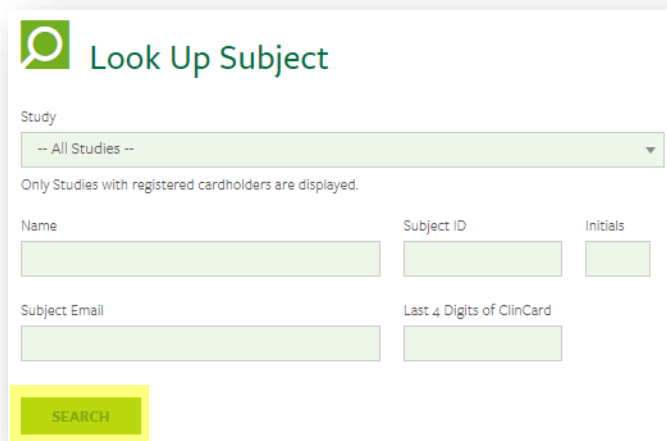
Look Up a Previously Registered Subject

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
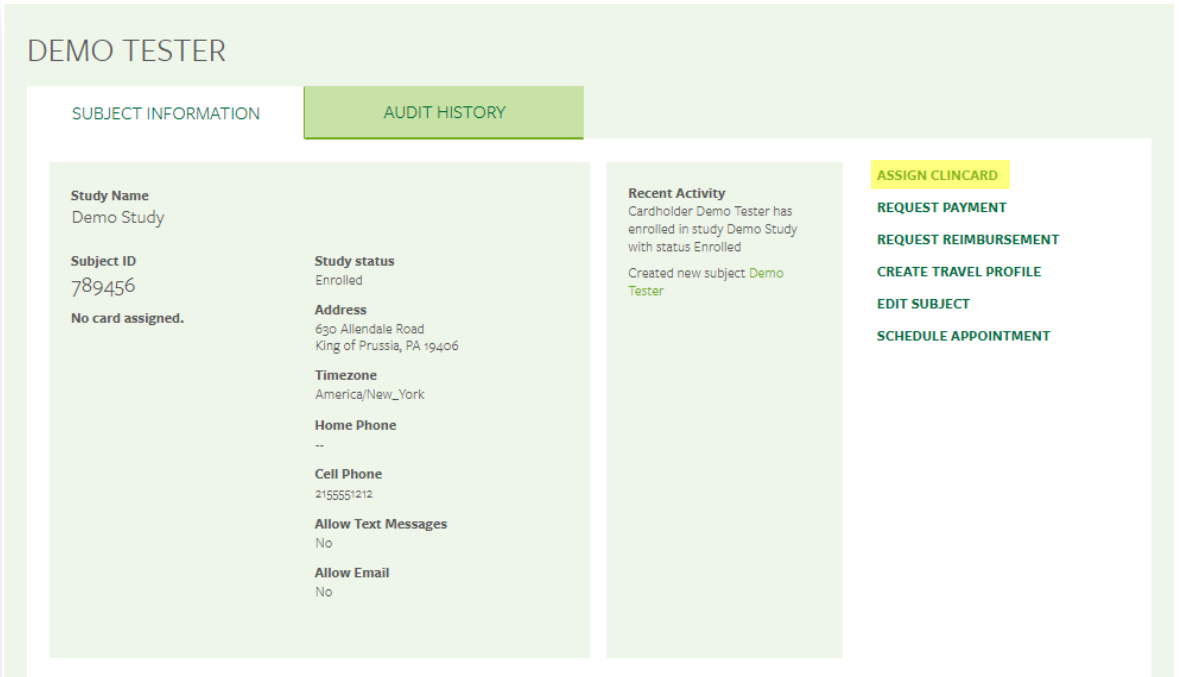   e. Last four (4) digits of ClinCard
4. Click **Search.**

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.

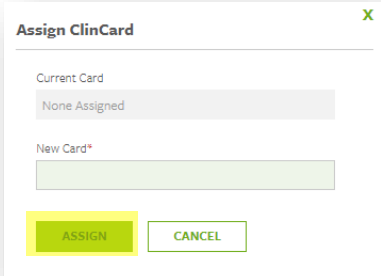1. Click **Assign ClinCard** and a pop-up screen will appear.

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.**

4. Once the card has successfully been assigned, you will receive a confirmation message at the top of the "Subject Information" screen.
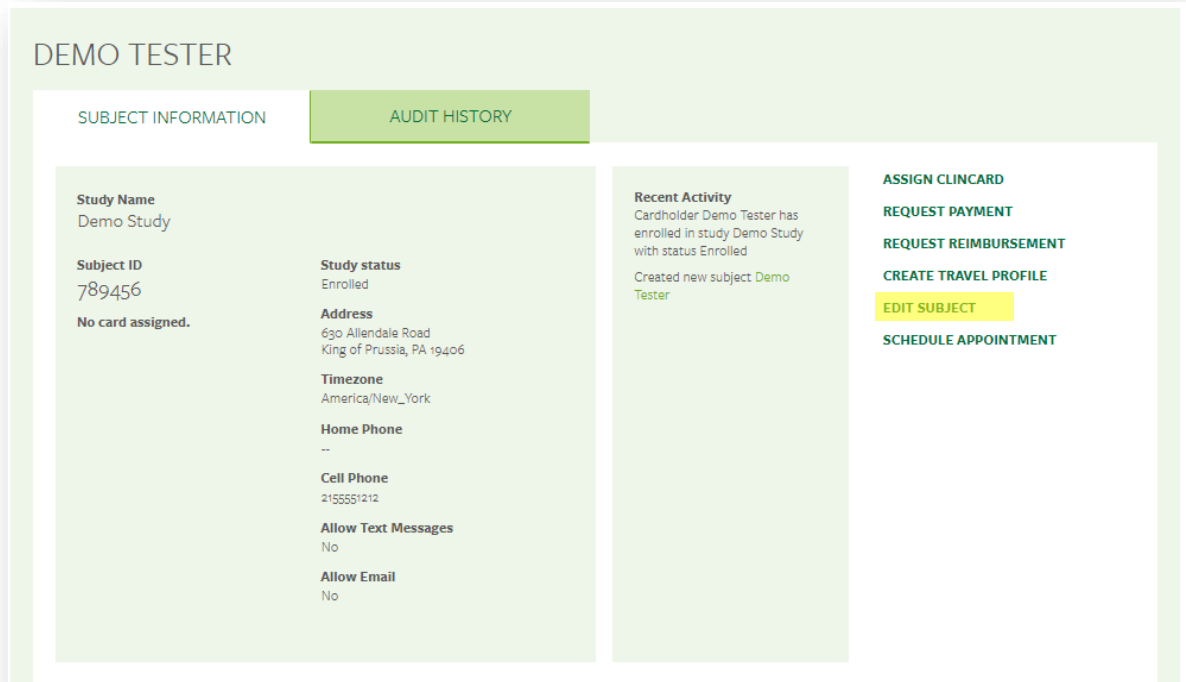
Success! The new card has been successfully assigned to Demo Tester. The new card will be active within 10 minutes.   **X**

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**.

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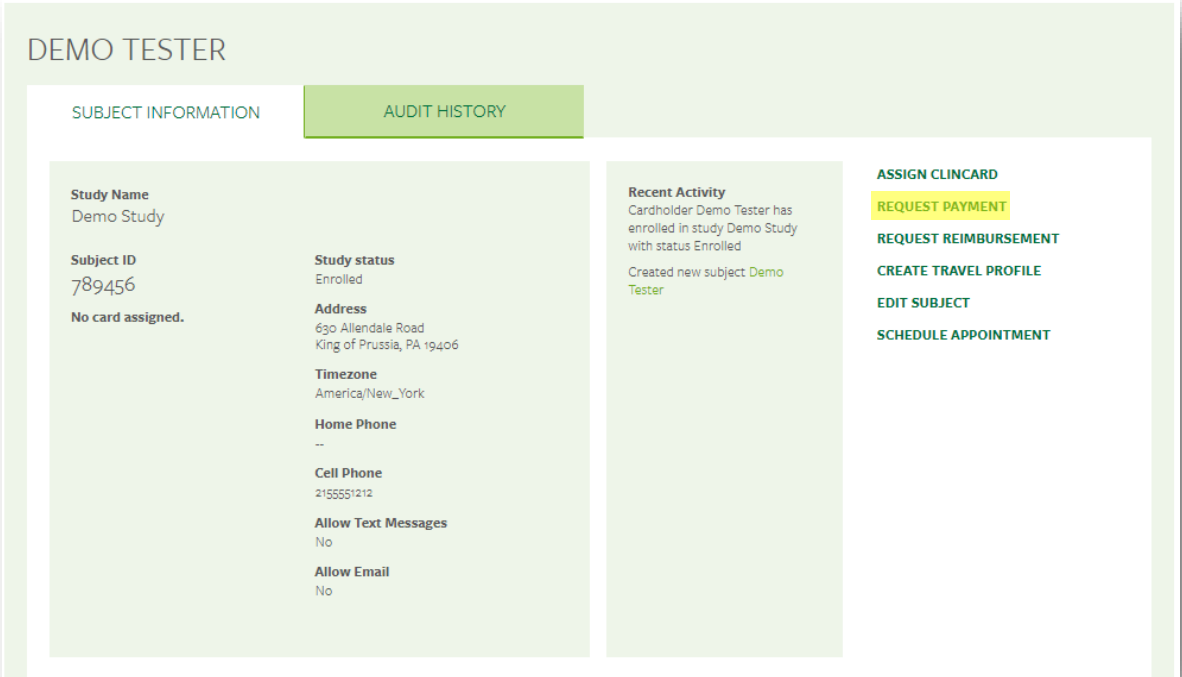

3. Select the Study from the drop-down menu, enter the new Subject ID, and select the Subject status.
4. Confirm Name, Address and all personal information.
5. Click **Save.**
   a. When making payments for a Subject registered to multiple studies, you may be prompted to select the appropriate study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

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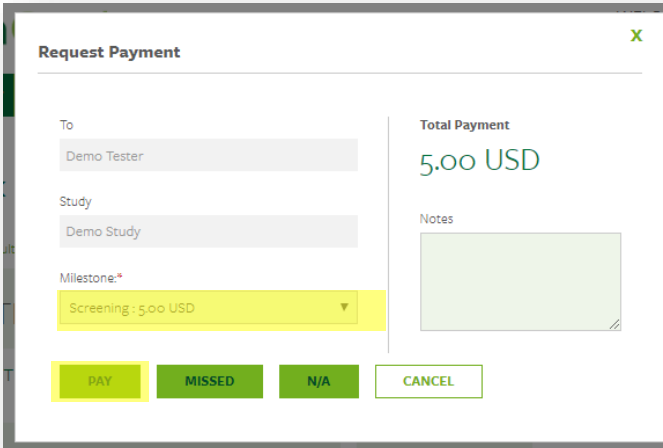
1. Click **Request Payment** and pop-up screen will appear

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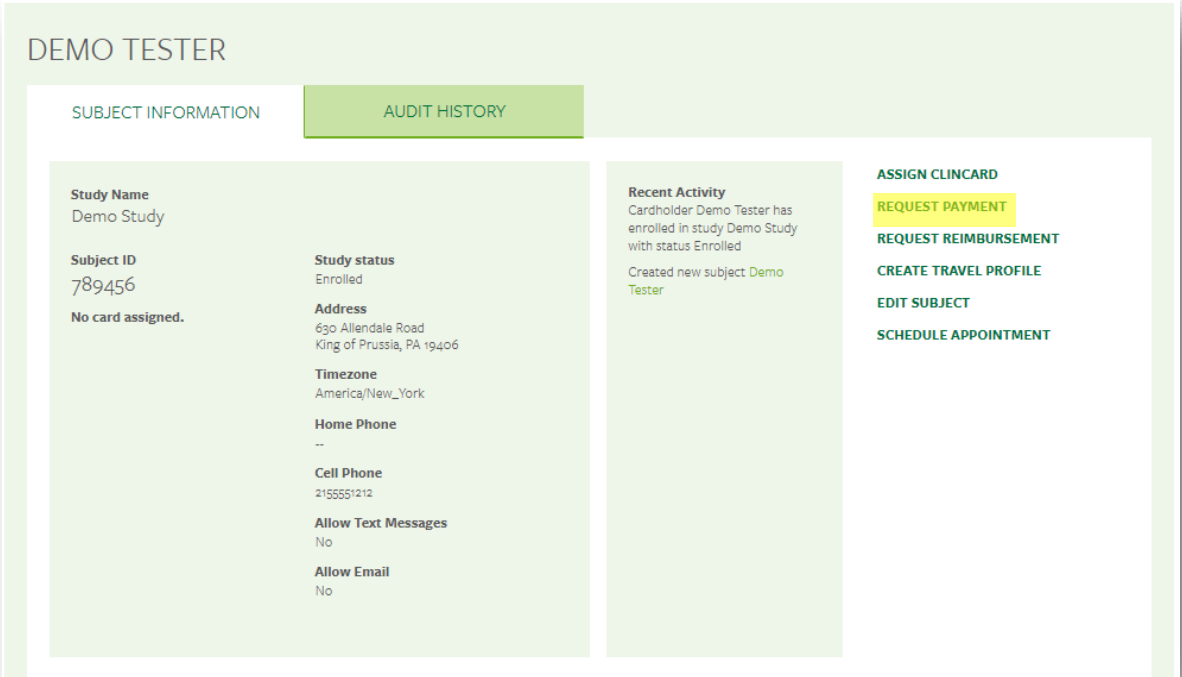3. Add any Notes (not required).

4. Click **Pay.**

a   When a payment has successfully been <u>requested</u>, 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 <u>approved</u> and <u>processed</u>, 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
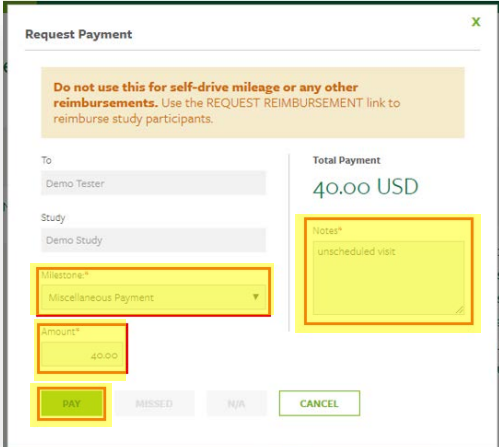
Make a Miscellaneous Payment

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.
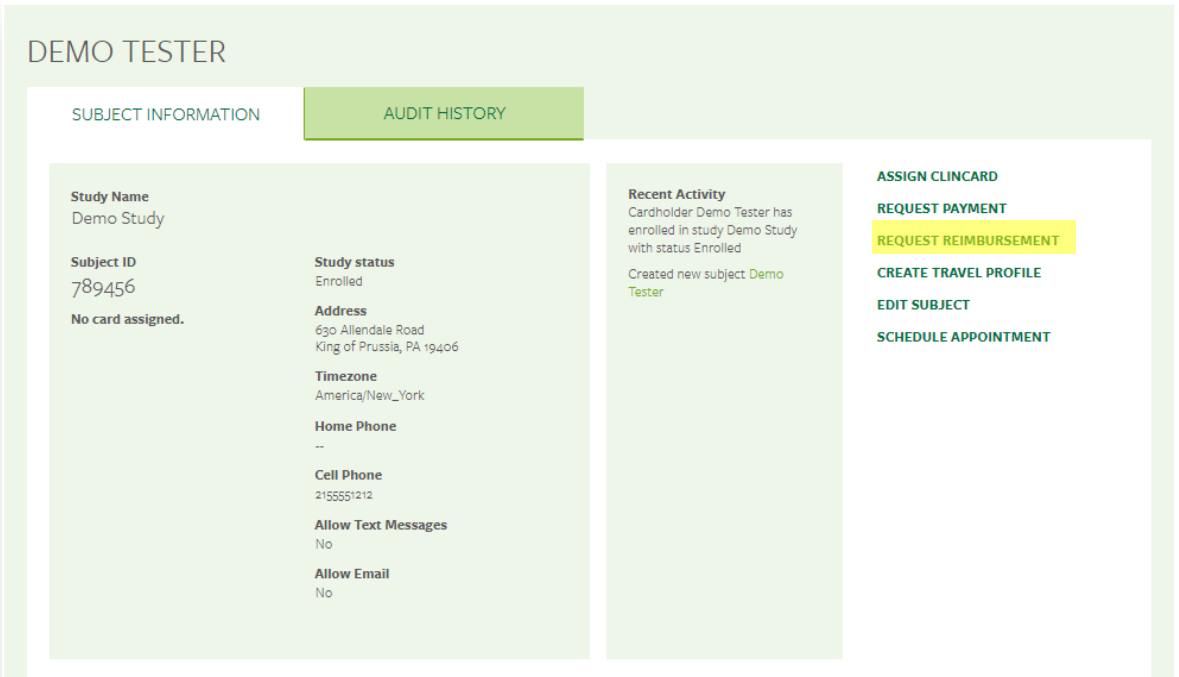4. Add an appropriate comment in the "Note" field, e.g., Unscheduled Visit, etc.
5. Click **Pay.**
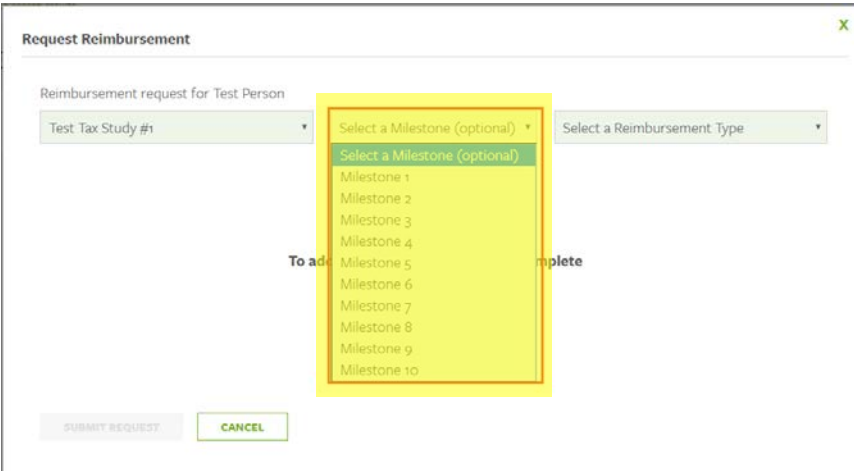
Request a Reimbursement and Receipt Upload

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.
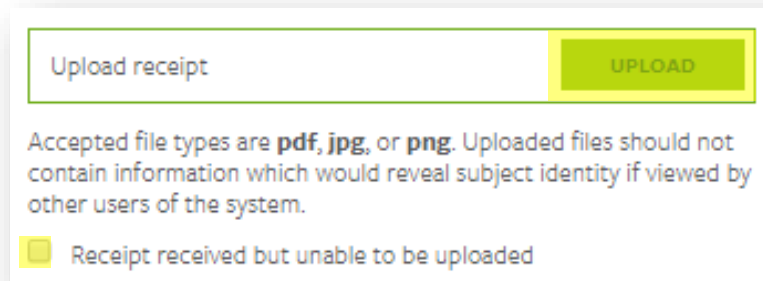
   a   Reimbursement options will show applicable to your study ONLY.

   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.
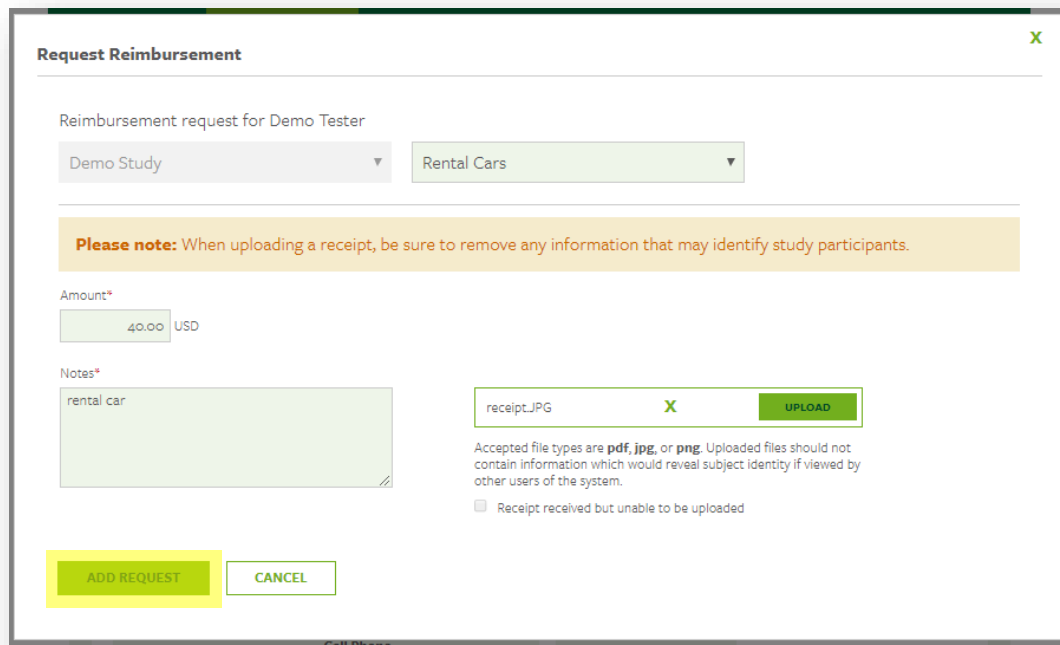

    b   As soon as the file is accepted, you will see "Upload receipt" change to the file name.

4.   Click **Add Request.**

5.   Once all reimbursements have been entered, click **Submit Request.**
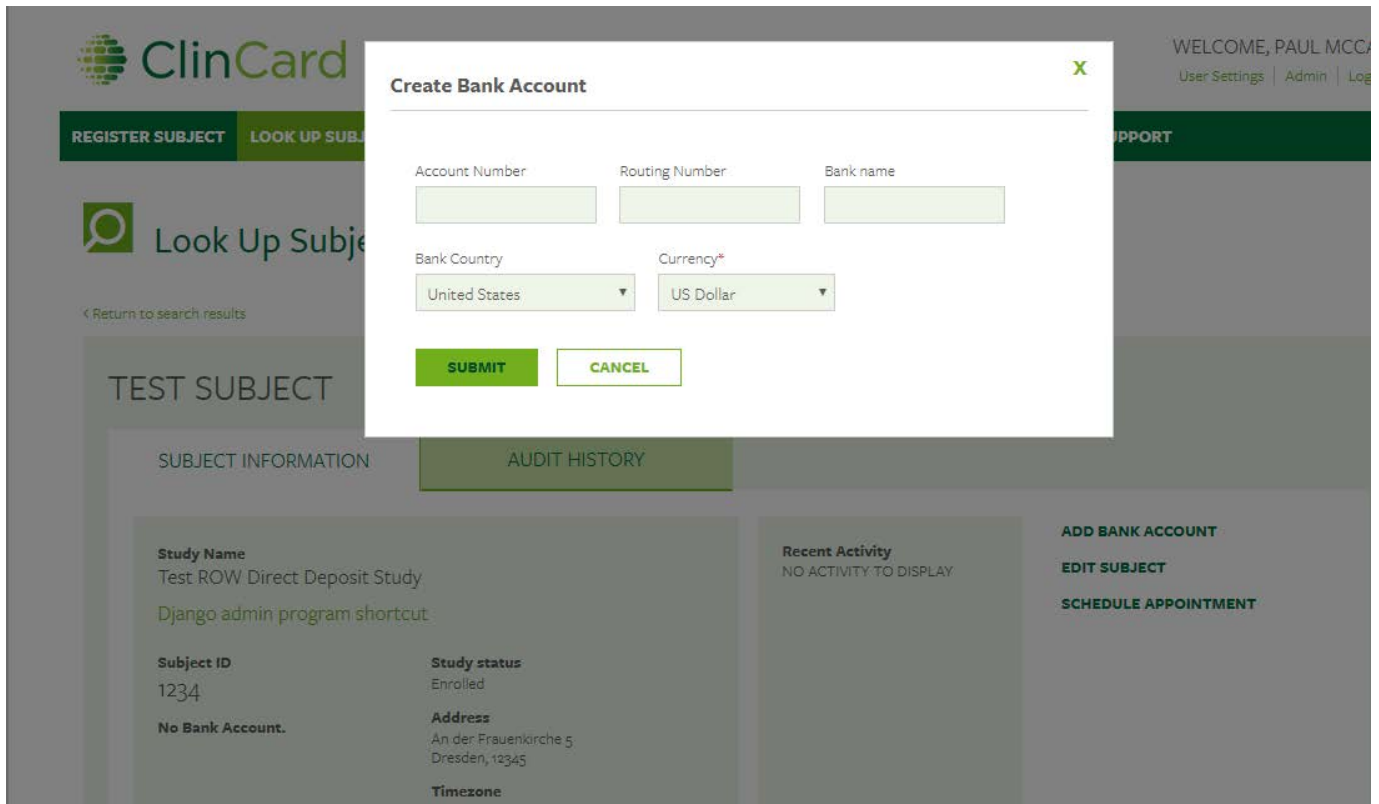
6. Once the reimbursement has been successfully submitted, you will receive a confirmation message at the top of the "Subject Information" screen.

Enter Bank Account Information

1. Click **Add Bank Account** and a pop-up screen will appear.
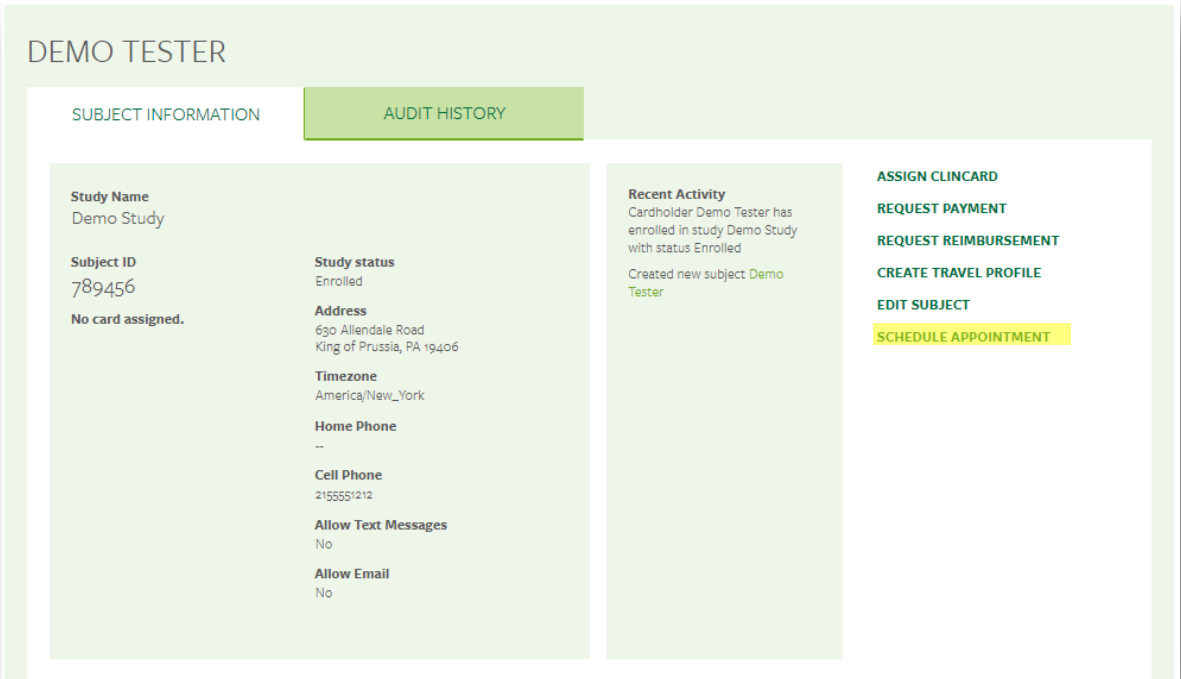
2. Enter the required bank account information.
3. Click **Submit.**
4. Once the card has successfully been assigned, you will receive a confirmation message at the top of the "Subject Information" screen.

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".

| 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.

Create a Travel Profile

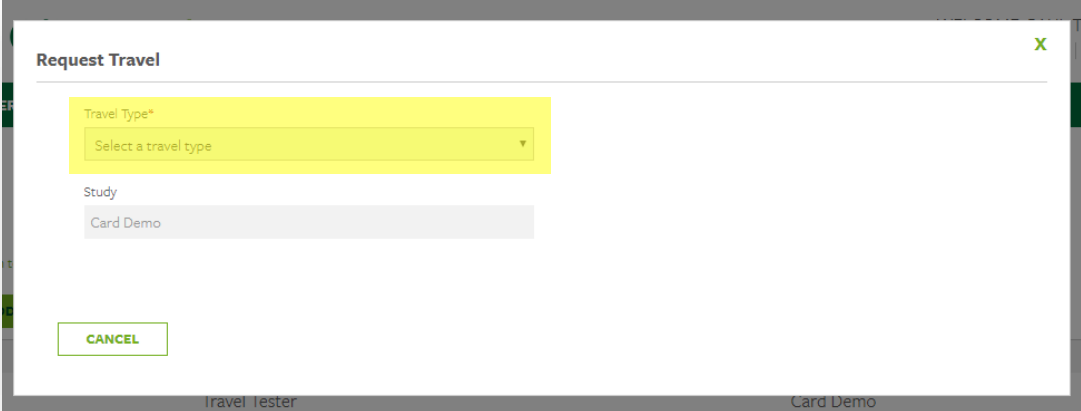1. Click **Create Travel Profile.**
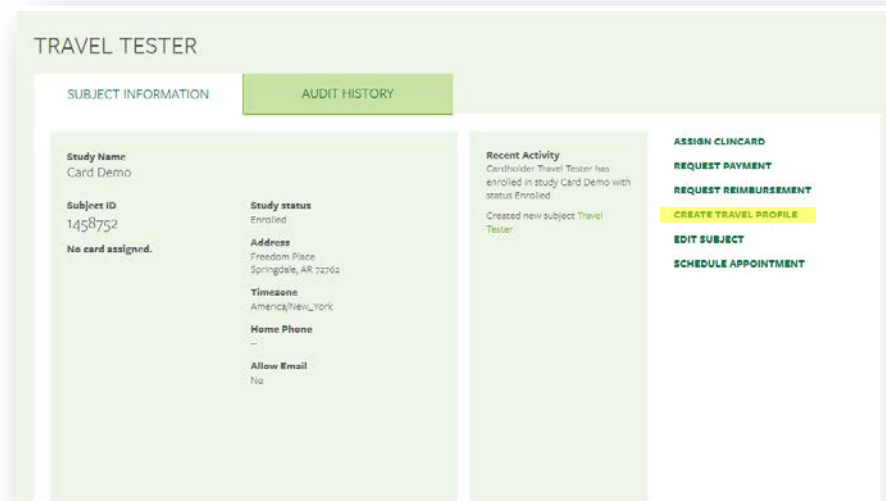
2. Click **Add Travel to Profile.**
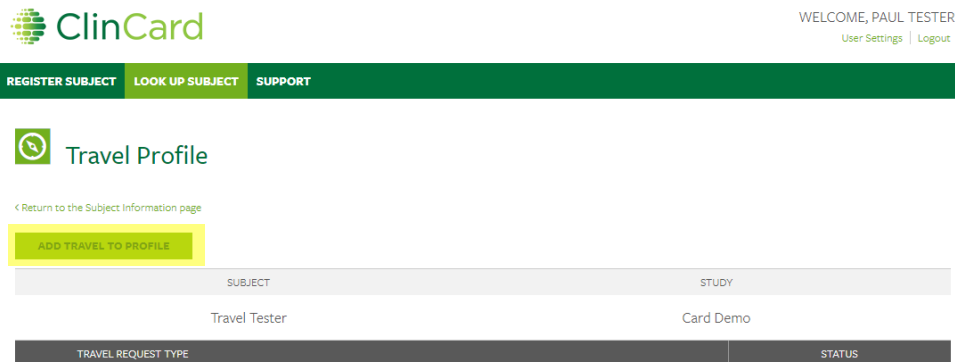
A travel profile has not been created for this subject in this study.

3. Select "Travel Type" from drop down menu.
    a. You will be brought to a new screen where you will be required to enter information regarding the selected Travel Type.
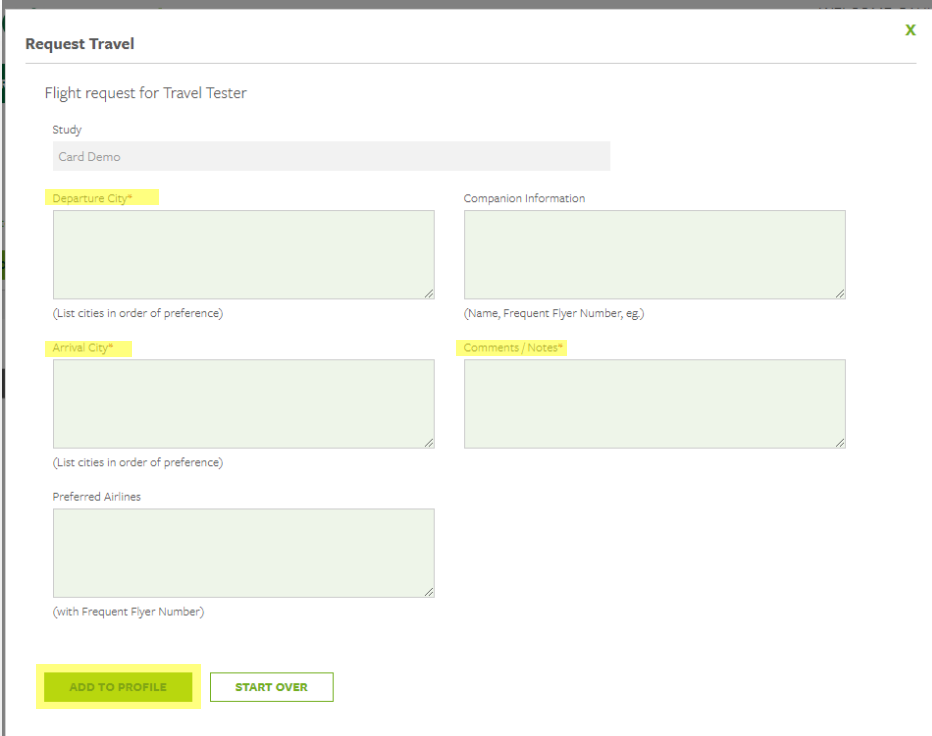
4. Complete the required fields and add any other necessary information, notes, etc. within this screen.
   a. IMPORTANT NOTE: The Subject Name entered into ClinCard needs to be the exact name found on their legal, travel documents (ex. Photo ID, Passport.)
5. Click **Add to Profile.**

6. Click **Submit Request** to finalize.

a. The Site Coordinator or Subject should contact the Travel Partner to complete the booking process

b. IMPORTANT NOTE: No travel arrangement will be booked until the Subject or Site Coordinator contacts the Travel Partner with specific dates and times
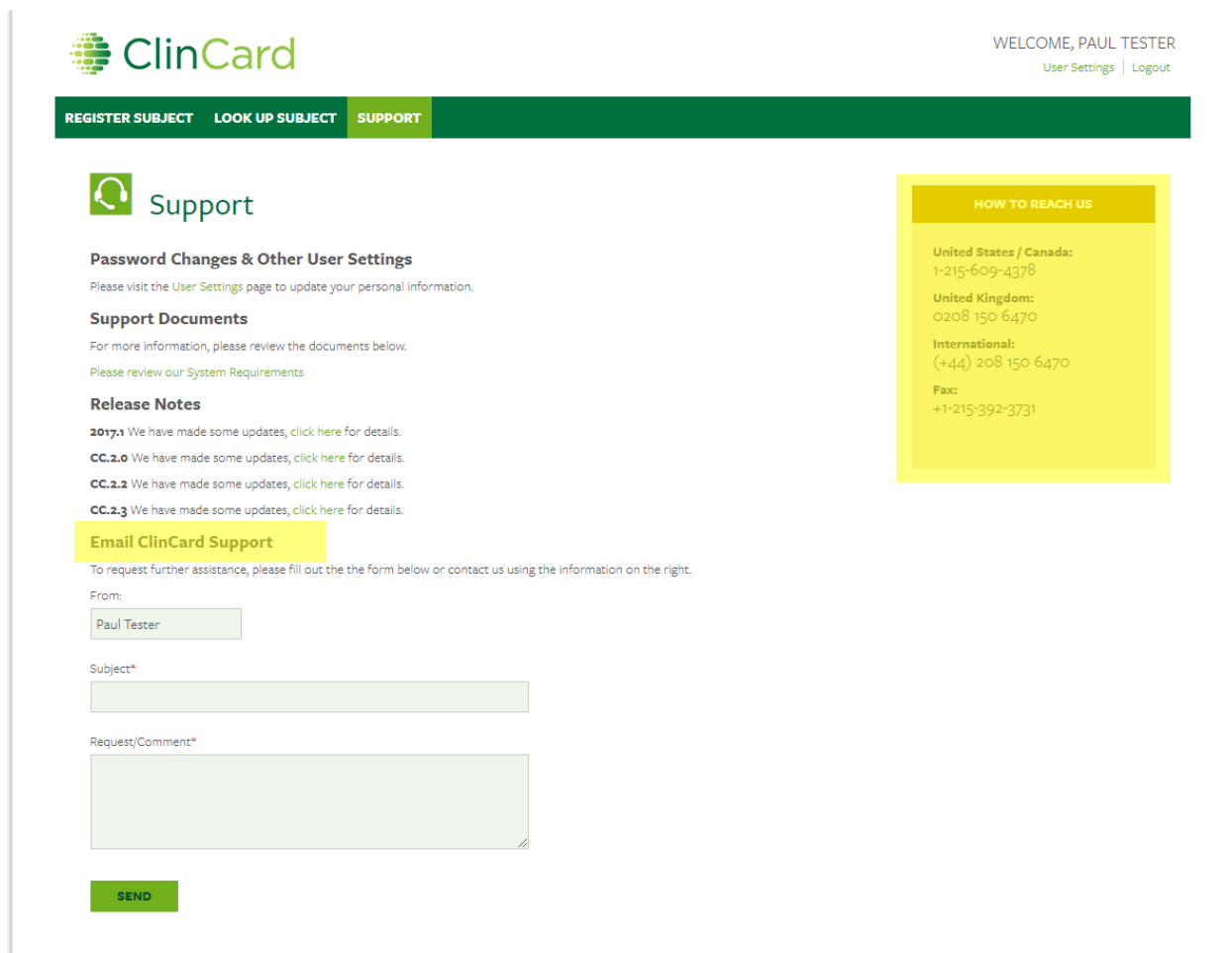
Request Assistance

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