ClinCard

ClinCard Reference Guide: *Site Coordinator + Direct Deposit*

▶ How to Login to www.clincard.com

1) Go to www.clincard.com
2) Enter your username and password. Keep in mind that your username and password are case sensitive so make sure to use capital letters as necessary
3) If you have difficulty logging into www.clincard.com, please click **Forgot your username/password?**, enter your email address and click **Recover**. This will instantly send you an email with a link that allows you to reset your password

   Note: If you continue to have difficulty logging in, please email support@greenphire.com from the email account you have on file or call our Support Team directly at 215-609-4378

▶ How to Register a Subject

1) Login to www.clincard.com
2) Click **Register Subject**
3) Select the appropriate Study from the drop-down menu
4) Enter the required information into the brief form
   a. Study Status
   b. Subject ID
   c. Site
   d. Name
   e. Address
   f. Date of Birth
   g. Email (required for travel or messaging)

Note: If you would like the Subject to receive payment confirmations or appointment reminders, be sure the "Enable Email Alerts" and/or "Enable Text Messaging" checkboxes are selected

5) Click **Register**
6) You will be brought to the "Subject Information" screen where you can assign a card, make a payment, schedule an appointment reminder, replace a ClinCard or edit a Subject's information

▶ How to Look Up a Subject Who Has Already Been Registered

1) Login to www.clincard.com
2) Click **Look Up Subject**
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) All Results will appear below the "Search Results" header
6) Click (the **green/bold**) **Last Name** of the Subject
7) You will be brought to the "Subject Information" screen where you can assign a card, make a payment, schedule an appointment reminder, replace a ClinCard or edit a Subject's information

▶ How to Assign a ClinCard to a Subject:

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 all of 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 12-digit token number visible through the window of one of the ClinCard card packages you received
    Note: Do not open the envelope prior to providing to the Subject. The 12-digit 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. 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 a card number from a new ClinCard card package
    Note: The "Replace ClinCard" process will immediately inactivate the lost card and automatically transfer any available/pending balance to the newly assigned ClinCard

▶ How to Make a Site Visit Payment:

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 all of the actions you can perform on the Subject.

1) Click **Make Site Visit Payment** and a pop-up screen will appear
2) Select from the dropdown box which milestone the Subject is being paid, e.g., Visit 1, Visit 2, etc.

3) Add any Notes (not required)
4) Click **Pay**
5) Once the 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
6) Once a payment request 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
7) If the Subject has opted to receive email and/or text messages, the Subject will receive a payment confirmation communication

▶ How to Make a Manual Subject Payment

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 all of the actions you can perform on the Subject.

1) Click **Manual Subject Payment** and a pop-up screen will appear
2) Enter the payment value that you want to pay to the Subject in the "Amount" field
3) Add an appropriate comment in the "Note" field, e.g., Unscheduled Visit, etc.
4) Click **Make Payment**
5) Once the 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
6) Once a payment request 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
7) If the Subject has opted to receive email and/or text messages, the Subject will receive a payment confirmation communication

▶ How to Setup an Appointment Reminder

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 all of the actions you can perform on the Subject.

1) Click **Schedule Appointment** and a pop-up menu will appear
2) Enter the date and time of 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"
5) If the Subject has opted to receive email and/or text messages, the Subject will receive a reminder communication 3 days and 1 day prior to the Subject's next appointment