



# ClinCard Quick Reference Guide

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## Version 7.3

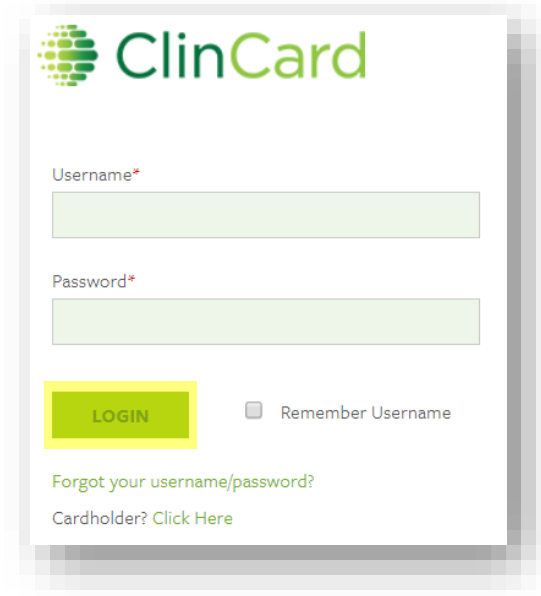
Updated: October 2019

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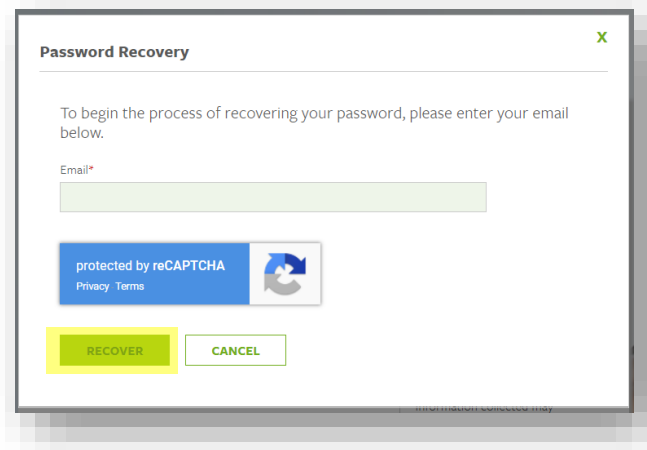
## Login to ClinCard

1. Login to [www.clincard.com](http://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 section 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 the "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 box with the text "protected by reCAPTCHA" and a reCAPTCHA logo. Below the reCAPTCHA box are two buttons: a yellow "RECOVER" button and a white "CANCEL" button.

## Register a Subject

1. Login to [www.clincard.com](http://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.

The screenshot shows the 'Subject Registration' form. At the top, there is a green checkmark icon and the title 'Subject Registration'. Below the title, a text prompt says 'To begin the registration process, please select a study\*'. A dropdown menu is set to 'Demo Study'. Below this, there are three fields: 'Study Status\*' (dropdown set to 'Enrolled'), 'Subject ID\*' (empty text box), and 'Site\*' (dropdown set to 'Greenphire Clinic').

The form is divided into sections: 'Name', 'Address', and 'Personal'.  
- **Name**: Includes fields for 'First Name\*', 'Middle', 'Last Name\*', 'Initials', and 'Social Security Number'.  
- **Address**: Includes 'Country\*' (dropdown set to 'United States') and a search box for an address with the placeholder text 'Search for an address\*' and 'Begin typing to find and address'.  
- **Personal**: Includes 'Timezone\*' (dropdown set to 'America/Eastern') and 'Language' (dropdown set to 'English'). Below these are 'Date Of Birth\*' (text box with 'ex: 31-OCT-1952'), 'Subject Email Address' (text box with 'ex: name@example.cc'), and 'Subject Home Phone' (text box with 'ex: 215-555-1212'). There are two checkboxes: 'Enable Email Alerts' and 'Enable Text Messaging', both currently unchecked.

At the bottom left of the form is a yellow 'REGISTER' button.

- 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.

## 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**

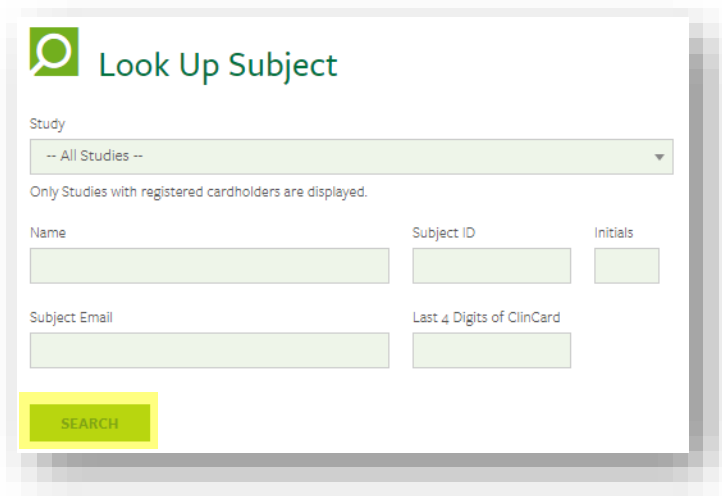
**CREATE TRAVEL PROFILE**

**EDIT SUBJECT**

**SCHEDULE APPOINTMENT**

## Look Up a Previously Registered Subject

1. Login to [www.clincard.com](http://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**.



**Look Up Subject**

Study  
 -- All Studies --

Only Studies with registered cardholders are displayed.

Name  Subject ID  Initials

Subject Email  Last 4 Digits of ClinCard

**SEARCH**

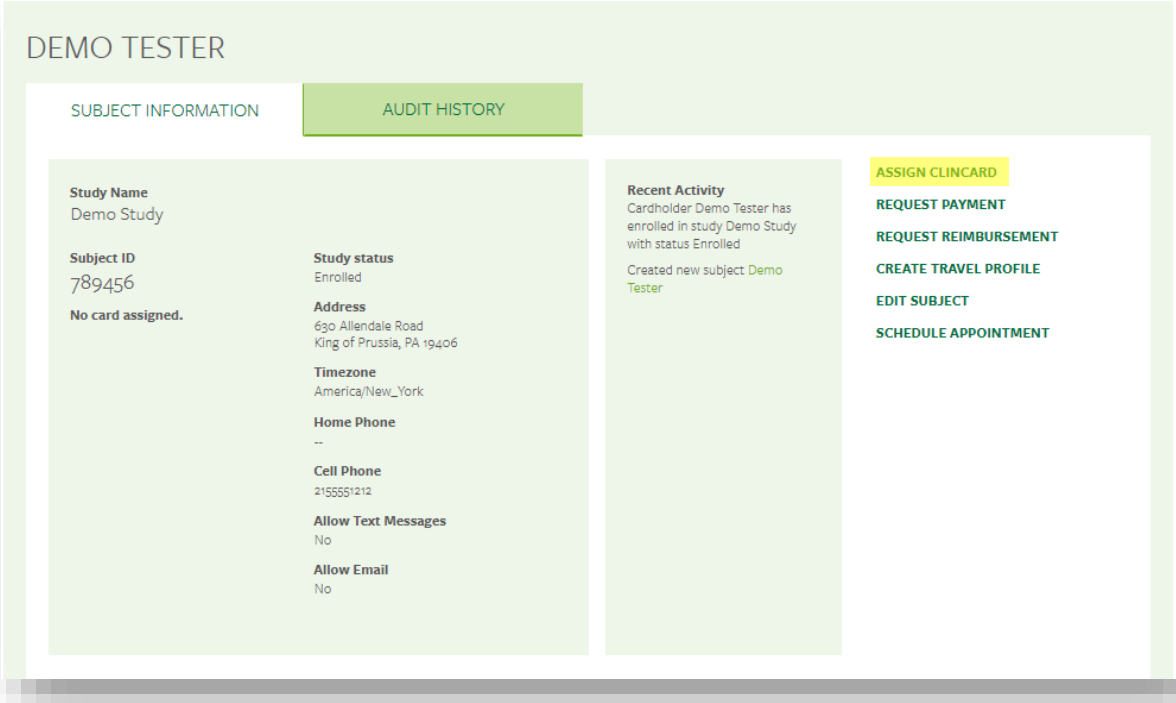
5. Results will appear below the “Search Results” header.
6. Click the hyperlink **Last Name** of the Subject.

LAST NAME	FIRST NAME	LAST FOUR	LOCATION	STUDY	ID
<a href="#">Tester</a>	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**

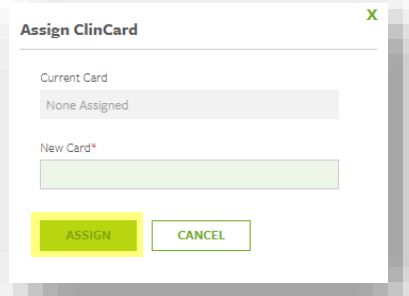
**REQUEST REIMBURSEMENT**

**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.

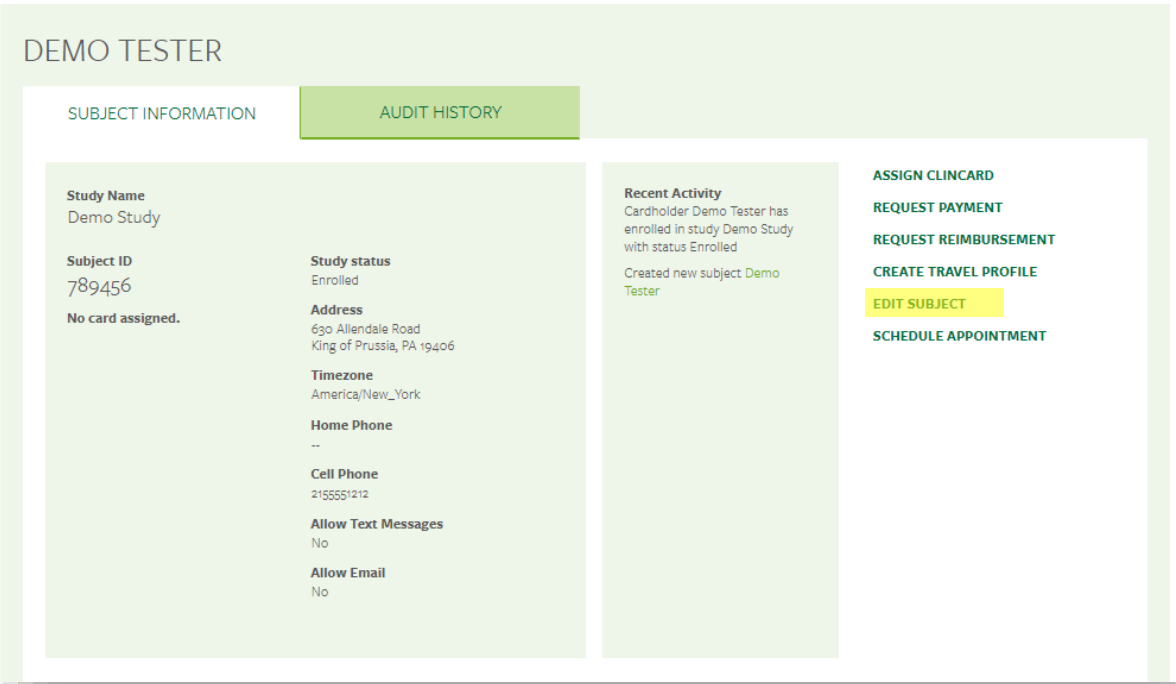
**Success!** The new card has been successfully assigned to Demo Tester. The new card will be active within 10 minutes. **X**

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**.



**DEMO TESTER**

SUBJECT INFORMATION    **AUDIT HISTORY**

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

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

### Study Membership

Study*	Subject ID*	Subject Status*
Demo Study ▼	789456	Enrolled ▼
<b>+ ADD STUDY</b>		

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' (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** (highlighted in yellow)
  - REQUEST REIMBURSEMENT
  - CREATE TRAVEL PROFILE
  - EDIT SUBJECT
  - SCHEDULE APPOINTMENT

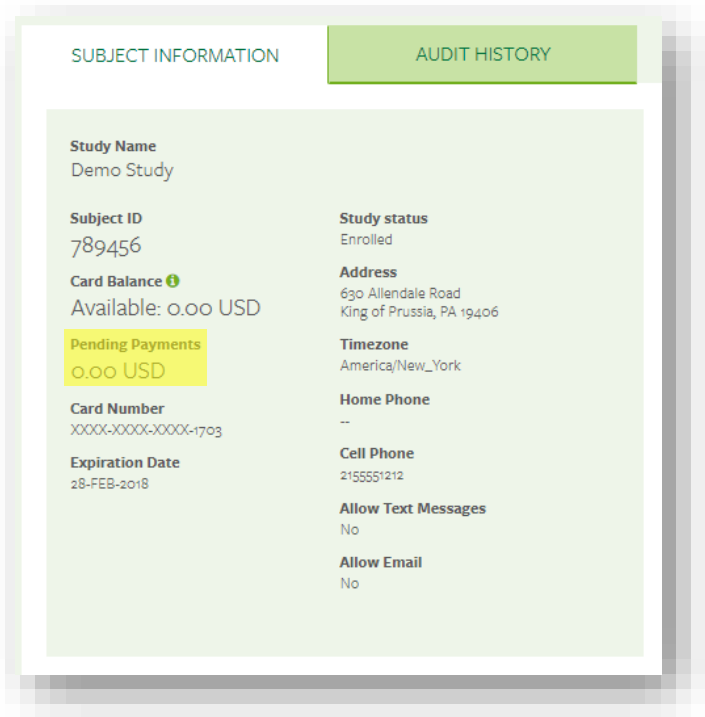
2. Select the milestone the subject is being paid.
3. Add any Notes (not required).

The 'Request Payment' pop-up screen 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:** (Empty text area)
- Buttons:** PAY (highlighted in yellow), MISSED, N/A, CANCEL

4. Click **Pay**.

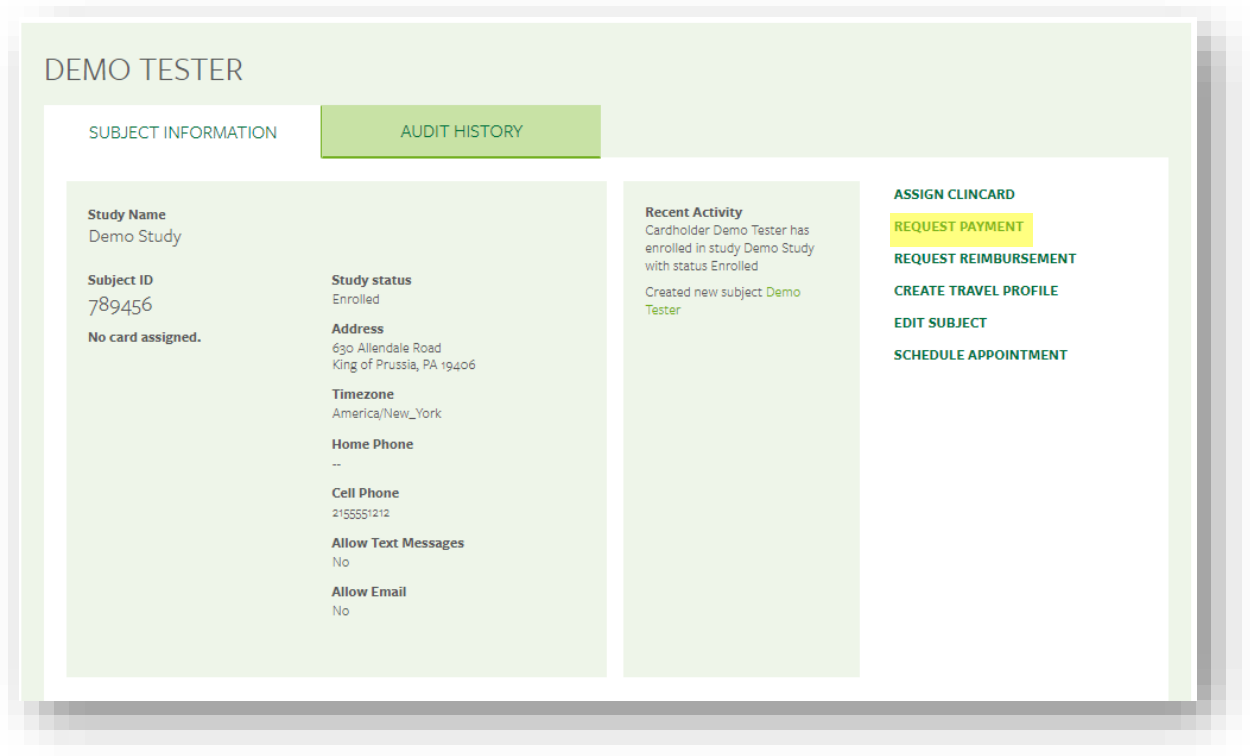
- a When a payment has successfully been requested, the “Pending Payments” area of the “Subject Information” screen will reflect the payment. It will also be reflected in your “Recent Activity” in the middle of the screen.
- b When a payment has been approved and processed, the amount will be removed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

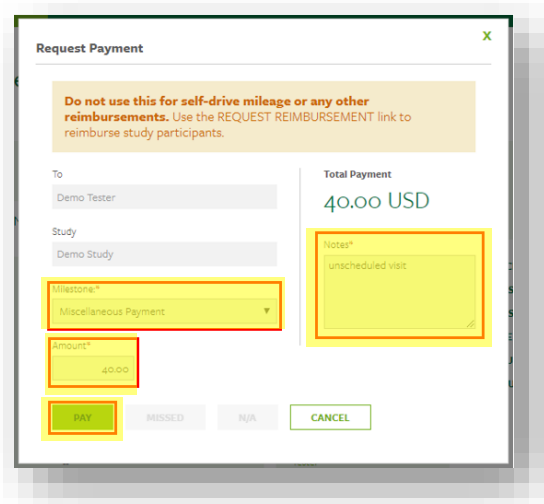


The screenshot shows the 'DEMO TESTER' subject profile page. It has two tabs: 'SUBJECT INFORMATION' and 'AUDIT HISTORY'. The 'SUBJECT INFORMATION' tab is active and displays the following details:

- 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**.



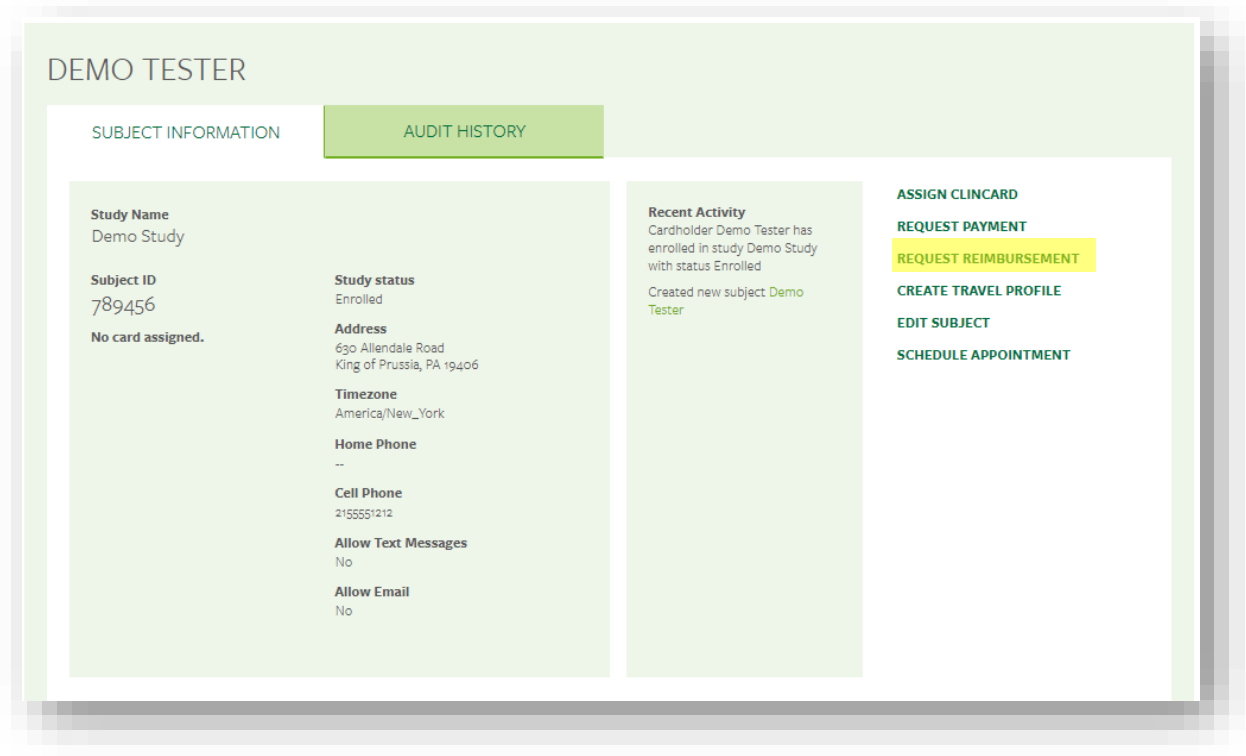
The screenshot shows the 'Request Payment' pop-up form. It includes a warning message: 'Do not use this for self-drive mileage or any other reimbursements. Use the REQUEST REIMBURSEMENT link to reimburse study participants.' The form fields are as follows:

- 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)

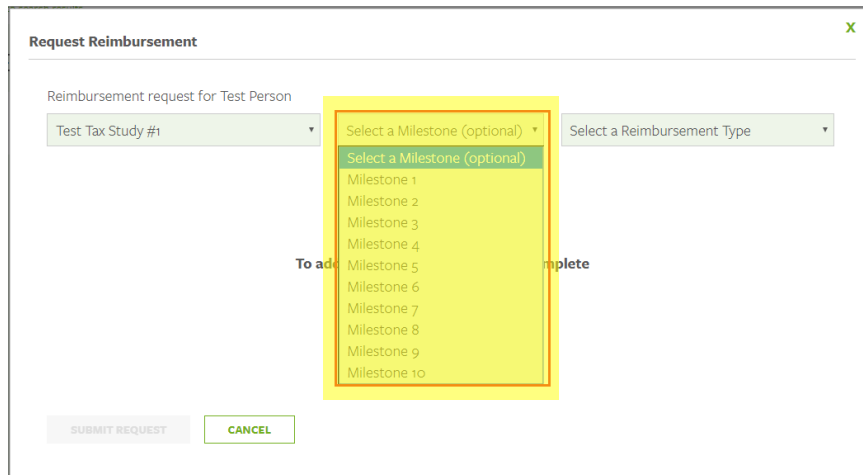
At the bottom, there are four buttons: 'PAY' (highlighted in yellow), 'MISSED', 'N/A', and 'CANCEL'.

## Request a Reimbursement and Receipt Upload

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

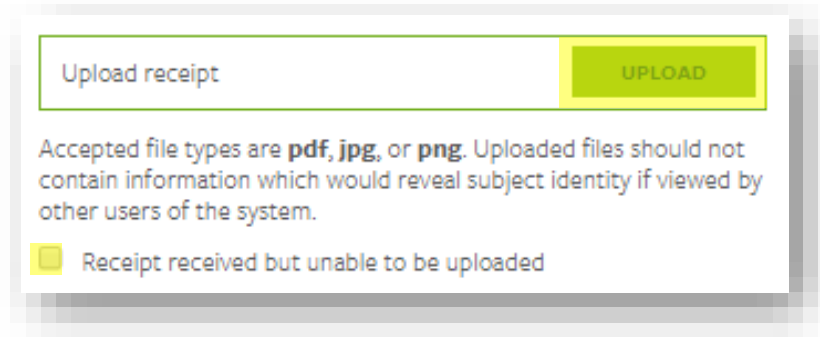


2. Select the milestone (if applicable) and reimbursement from the milestones drop-down menu.
  - a Reimbursement options will show applicable to your study ONLY.

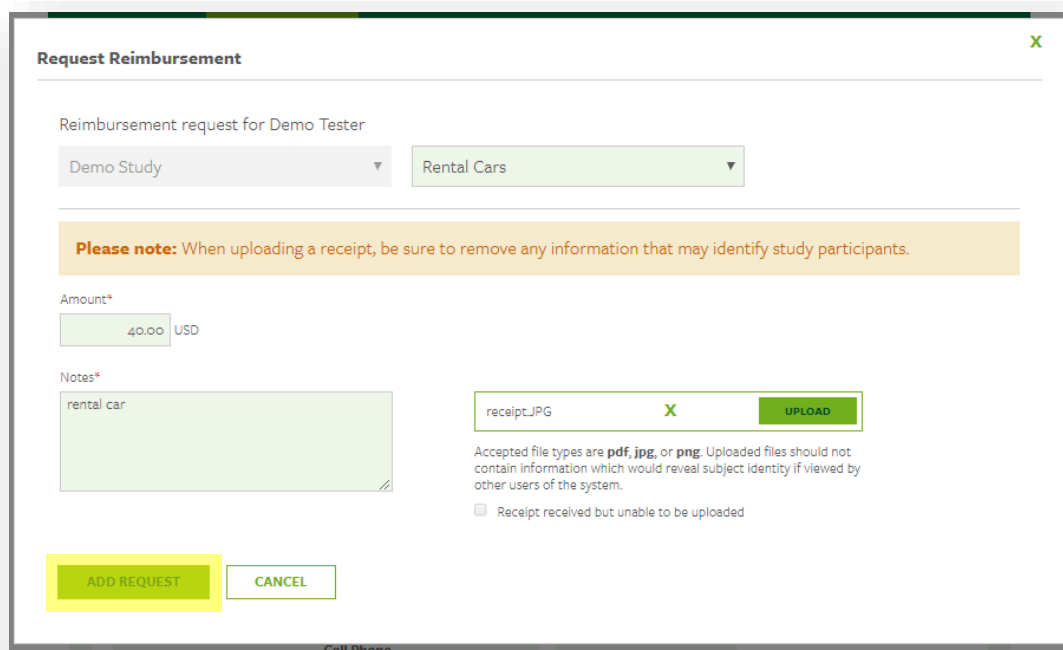


- b Reimbursements can be associated with specific milestones. The list of milestones will come from the preset study payments maintained by the Study Admin or by Greenphire.

- 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

Category	Amount
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**

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.

**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.

<p><b>Starting Address</b></p> <p>Country* United States ▼</p> <p>Search for an address (Default is home address) 123 South Broad Street Philadelphia Pennsylvania</p> <p>123 South Broad Street Philadelphia, PA 19109 USA</p>	<p><b>Ending Address</b></p> <p>Country* United States ▼</p> <p>Search for an address (Default is site address) Begin typing to find and address</p> <p>1018 West 9th Avenue King of Prussia, PA 19406 USA</p>	<p><b>Travel Date</b> dd-M-YYYY</p> <p><b>Round Trip</b></p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #fff9c4;"> <p>Notes*</p> <div style="border: 1px solid #ccc; height: 40px;"></div> </div>
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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)

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

**Starting Address**

Country\*

Search for an address (Default is home address)

123 South Broad Street  
 Philadelphia, PA 19109  
 USA

**Ending Address**

Country\*

Search for an address (Default is site address)

The address provided does not directly match with the Google-verified location. The address below will be used.

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

Travel Date

Round Trip

Notes\*

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

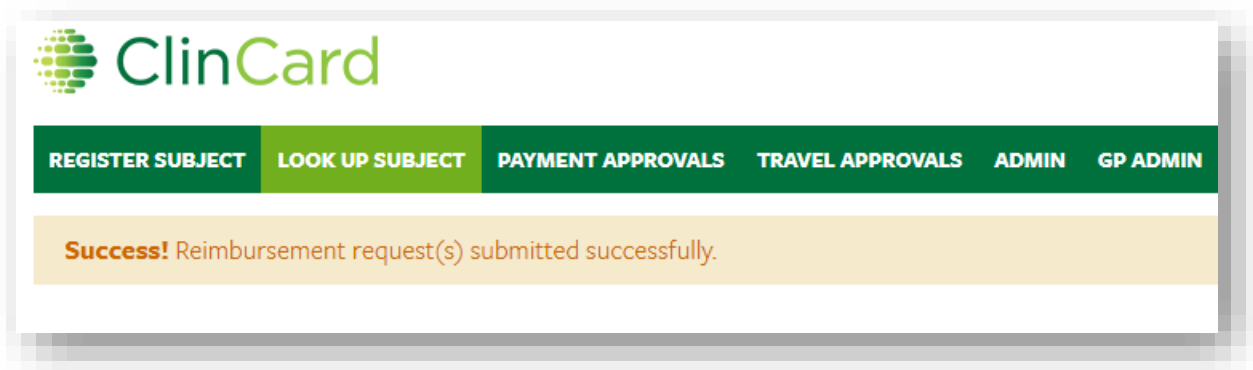
<b>Start Address:</b> 123 South Broad Street Philadelphia, PA 19109 USA	<b>End Address:</b> 1018 West 9th Avenue King of Prussia, PA 19406 USA	<b>Total Distance:</b> 43.9 miles Roundtrip: Yes	<b>Appointment Date:</b> 19-SEP-2019	<b>Milestone:</b> Screening Visit (if consent signed)	<b>Notes:</b> Note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

## Enter Bank Account Information

1. Click **Add Bank Account** and a pop-up screen will appear.

The screenshot shows the ClinCard interface with a 'Create Bank Account' modal form open. The background page displays 'TEST SUBJECT' information, including 'Study Name: Test ROW Direct Deposit Study', 'Subject ID: 1234', and 'Address: An der Frauenkirche 5, Dresden, 12345'. The modal form contains the following fields:

- Account Number:
- Routing Number:
- Bank name:
- Bank Country:
- Currency\*:

At the bottom of the modal are two buttons: **SUBMIT** and **CANCEL**. The background page also shows a navigation bar with 'REGISTER SUBJECT' and 'LOOK UP SUBJECT', and a sidebar with 'ADD BANK ACCOUNT', 'EDIT SUBJECT', and 'SCHEDULE APPOINTMENT' options.

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”.

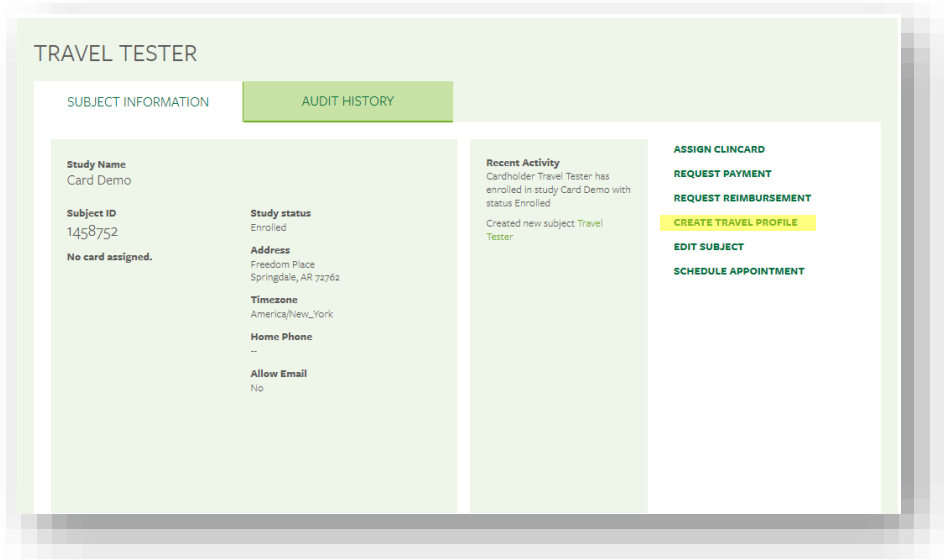
**Upcoming Appointments** Time zone: America/New\_York

DATE	DAY	TIME	STUDY	SCHEDULED BY	
26-APR-2018	Thursday	11:30 AM	Demo Study	Paul Tester	<a href="#">CHANGE</a>   <a href="#">CANCEL</a>

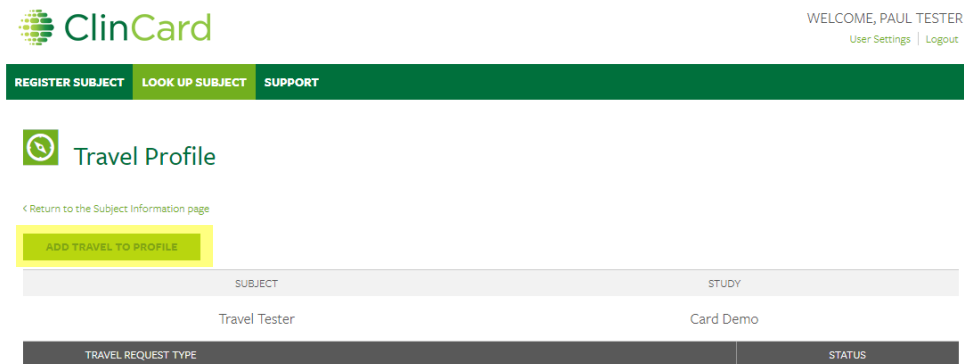
- a If the Subject has opted to receive email and/or text messages, they will receive a communication reminder three days and one day prior to the Subject's next appointment.

## 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.

### Request Travel

Flight request for Travel Tester

Study  
Card Demo

Departure City\*  
Philadelphia

(List cities in order of preference)

Arrival City\*  
Denver

(List cities in order of preference)

Preferred Airlines

(with Frequent Flyer Number)

ADD TO PROFILE
START OVER

### Note

To finalize the travel bookings, please contact the travel partner.

SUBMIT REQUEST

- 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

X

**Success!** Your flight request for Travel Tester has been successfully submitted.

↻ **Travel Profile**

[Return to the Subject Information page](#)

ADD TRAVEL TO PROFILE

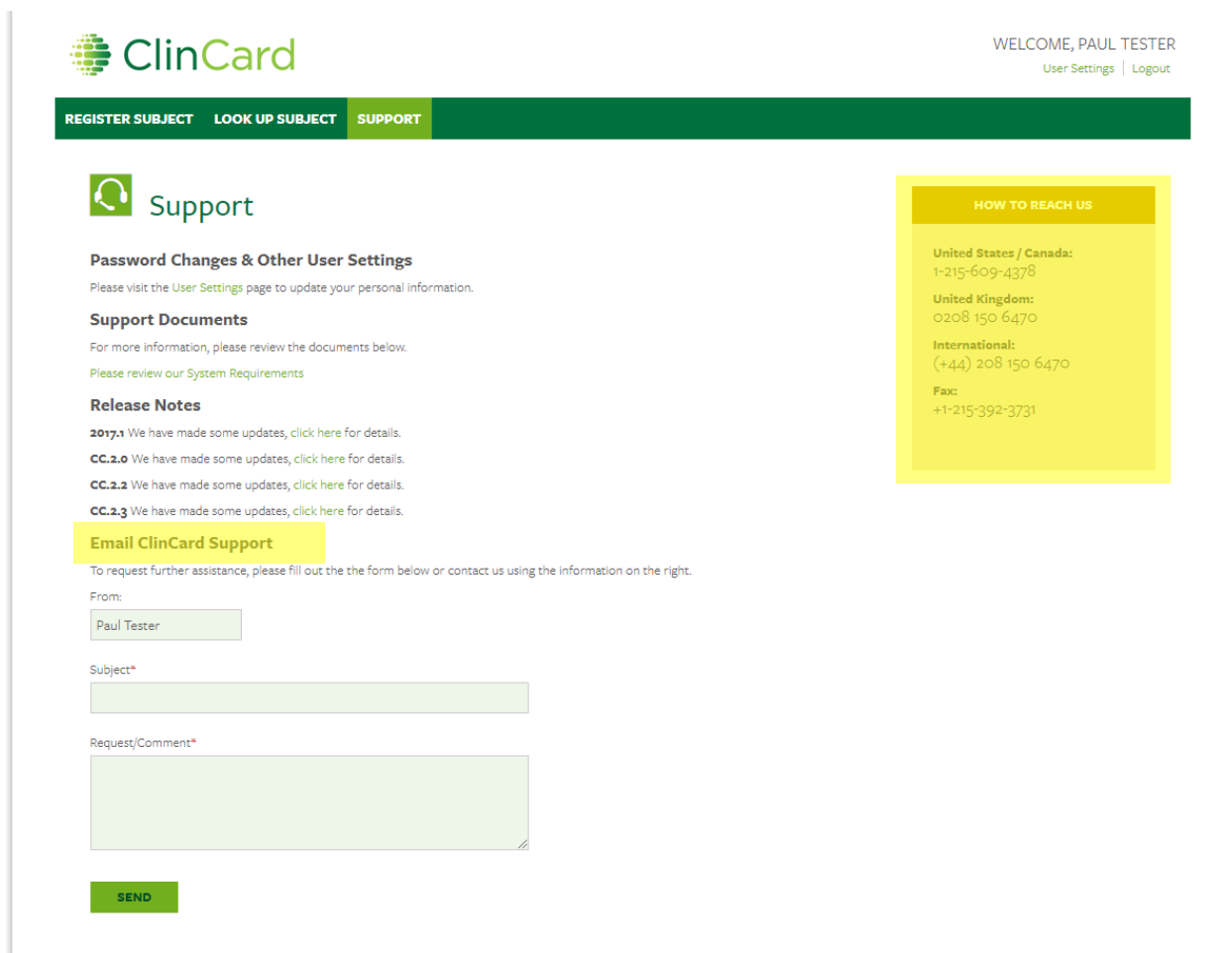
SUBJECT	STUDY
Travel Tester	Card Demo

TRAVEL REQUEST TYPE	STATUS
<span style="color: #4CAF50; font-size: 20px;">+</span> Flight Request	Awaiting approval from sponsor

## 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](mailto: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". A green navigation bar contains "REGISTER SUBJECT", "LOOK UP SUBJECT", and "SUPPORT". The "Support" section features a "Support" icon and title. Below this are sections for "Password Changes & Other User Settings", "Support Documents", and "Release Notes". 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, a yellow box titled "HOW TO REACH US" lists contact information for the United States/Canada, United Kingdom, and International.

**WELCOME, PAUL TESTER**  
User Settings | Logout

**REGISTER SUBJECT** **LOOK UP SUBJECT** **SUPPORT**

**Support**

**Password Changes & Other User Settings**  
Please visit the User Settings page to update your personal information.

**Support Documents**  
For more information, please review the documents below.  
Please review our System Requirements

**Release Notes**  
**2017.1** We have made some updates, [click here](#) for details.  
**CC.2.0** We have made some updates, [click here](#) for details.  
**CC.2.2** We have made some updates, [click here](#) for details.  
**CC.2.3** We have made some updates, [click here](#) for details.

**Email ClinCard Support**  
To request further assistance, please fill out the the form below or contact us using the information on the right.

From:  
Paul Tester

Subject\*

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