

ClinCard Admin Portal Quick Reference Guide

How to Login to www.clincard.com

- 1) Login to www.clincard.com.
- 2) Enter your login and password as provided to you. Keep in mind that your login 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 on the “Forgot username and password?” link, enter your email address, and click “Reset my password.” This will instantly send you an email with a link allowing you to reset your password.

Note: You can also call our site support team at 215-609-4378.

How to Register a Subject:

- 1) Login to www.clincard.com
- 2) Click on “Register Subject”
- 3) Enter the required information into the brief form
Note: If you would like the Subject to receive payment confirmations or appointment reminders, be sure the “Email (Enable)” and/or “Text Messaging (Enable)” checkboxes are selected
- 4) Click on the “Register” button
- 5) 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
- 6) If you have difficulty making a payment for the first time please call the ClinCard site support team at 215-609-4378 and we will be happy to walk you through it

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

- 1) Login to www.clincard.com
- 2) Click on “Look Up Subject”
- 3) Search for the Subject you want to pay by entering one of the following pieces of information and click on “Search”
 - a. First name and/or last name
 - b. Subject ID
 - c. Subject’s initials
- 4) Click on the underlined name of the Subject
- 5) You will be brought to the “Subject Information” screen where you can perform any of the actions required for the Subject, e.g., issue payment.

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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 on "Assign ClinCard" and a pop-up screen will appear
- 2) In the "New Card" field, enter the 16 digit number visible through the window of one of the ClinCard card packages you received
Note: There is no need to open the envelope prior to providing to the Subject
- 3) Click on the "Assign" button
- 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 on "Replace ClinCard," and follow the steps above, using a card number from a new ClinCard card package
Note: This will 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 a 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 on "Make Site Visit Payment" and a pop-up screen will appear
- 2) Select from the dropdown box which milestone the patient is being paid, e.g., Visit 1, Visit 2, etc.
- 3) Click on the "Pay" button
- 4) Once the payment has successfully been requested the "Pending Payment" area of the "Subject Information" screen will reflect the payment. It will also be reflected in your "Recent Activity" on the left-hand side of the screen.
- 5) Once a payment request has been approved and processed, the amount will be removed from the "Pending Payment" area and reflected in the "Available Balance" area
- 6) If the Subject has opted to receive email and/or text messages, the Subject will receive a payment confirmation communication when the payment is made

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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 patient.

- 1) Click on “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, Week 32, etc.
- 4) Click on the “Pay” button
- 5) Once a payment request has been processed, the amount will be removed from the “Pending Payment” area and reflected in the “Available Balance” area
- 6) If the Subject has opted to receive email and/or text messages, the Subject will receive a payment confirmation communication when the payment is made

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 on the “Schedule Appointment” button and a pop-up menu will appear
- 2) Using the dropdowns, enter the correct date and time of the Subject’s next appointment
- 3) Click on the “Schedule” button
- 4) The appointment has been stored and will appear at the bottom of the “Subject Information” screen under the header “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

How to Request Assistance:

If you have questions or comments about using the www.clincard.com Admin Portal, you may reach the ClinCard site support team by:

- 1) Submitting an email request through the “Support” link within the www.clincard.com website



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- 2) Directly emailing us at support@greenphire.com
- 3) Calling our site support team directly at 215-609-4378 between the hours of 8:30 am and 8:30 pm Eastern Time (Monday through Friday) in order to speak with a ClinCard team member