



# ClinCard Quick Reference Guide

---

Version 7.0

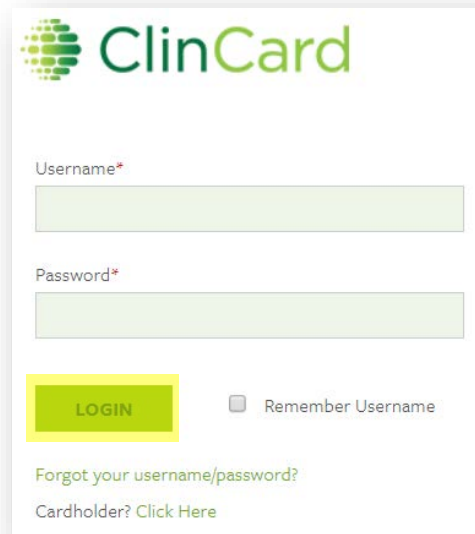
Updated: June 2018

## 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
Enter Bank Account Information .....	14
Setup an Appointment Reminder .....	15
Create a Travel Profile.....	17
Request Assistance .....	20

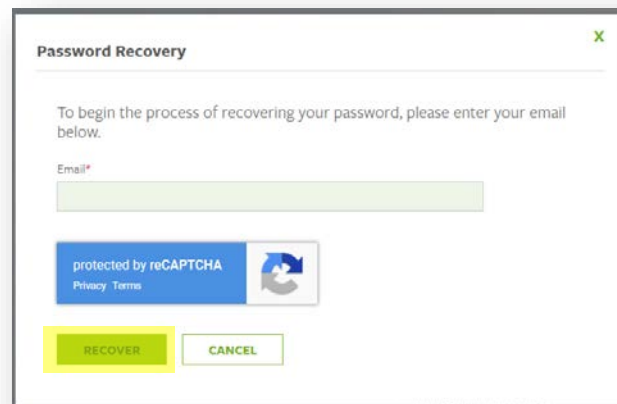
## Login to ClinCard

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\*'. To the right of the password field is a checkbox labeled 'Remember Username'. Below the input fields is a yellow 'LOGIN' button. At the bottom of the form are two links: 'Forgot your username/password?' and 'Cardholder? Click Here'.

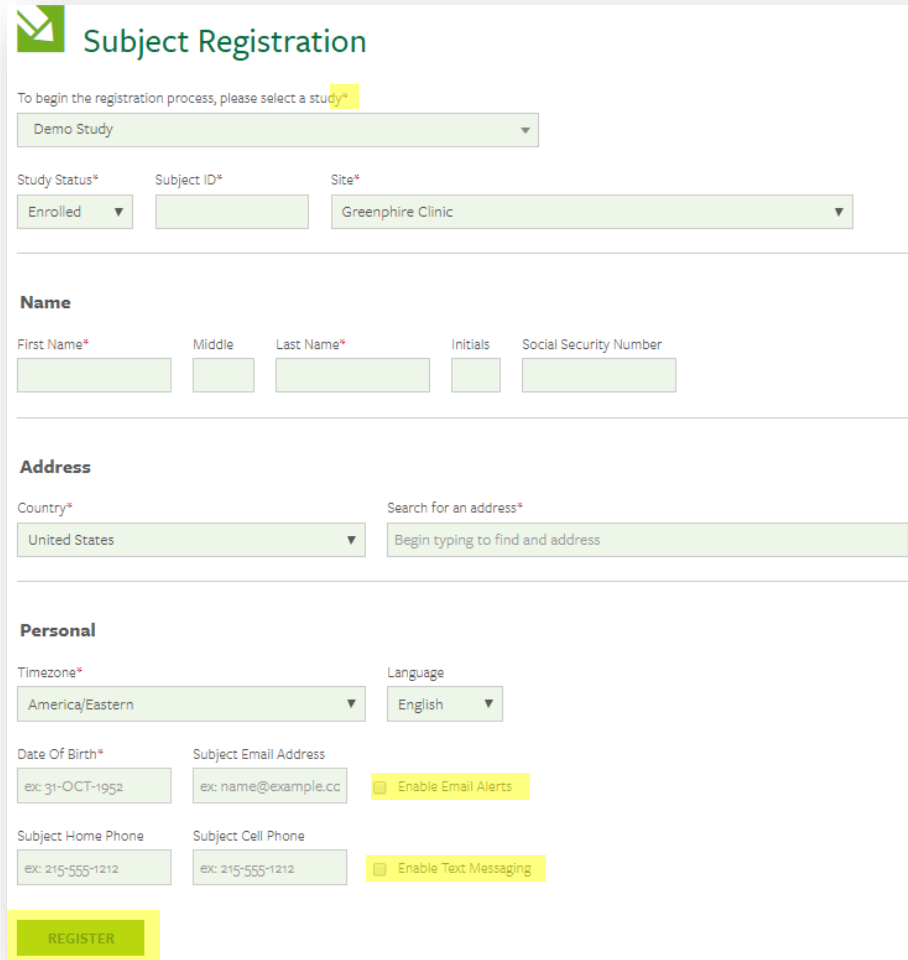
3. If you have difficulty logging in, click **Forgot your username/password?**. Enter your email address and click **Recover**.
  - a This will instantly send you an email with a link that allows you to reset your password.
  - b You can also call our site support team:
    - i Local United States/Canada: (215) 609.4378
    - ii United States Toll Free Number: (844) 847.0107



The image shows a 'Password Recovery' dialog box. It has a title bar with a close button (X). The main text says 'To begin the process of recovering your password, please enter your email below.' Below this is an 'Email\*' input field. At the bottom left is a blue box with the text 'protected by reCAPTCHA' and a link to 'Privacy Terms'. To the right of this is a reCAPTCHA image. At the bottom 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.



**Subject Registration**

To begin the registration process, please select a study\*

Demo Study

Study Status\*      Subject ID\*      Site\*

Enrolled           Greenphire Clinic

**Name**

First Name\*      Middle      Last Name\*      Initials      Social Security Number

Address

Country\*      Search for an address\*

United States      Begin typing to find and address

**Personal**

Timezone\*      Language

America/Eastern      English

Date Of Birth\*      Subject Email Address

ex: 31-OCT-1952      ex: name@example.cc       Enable Email Alerts

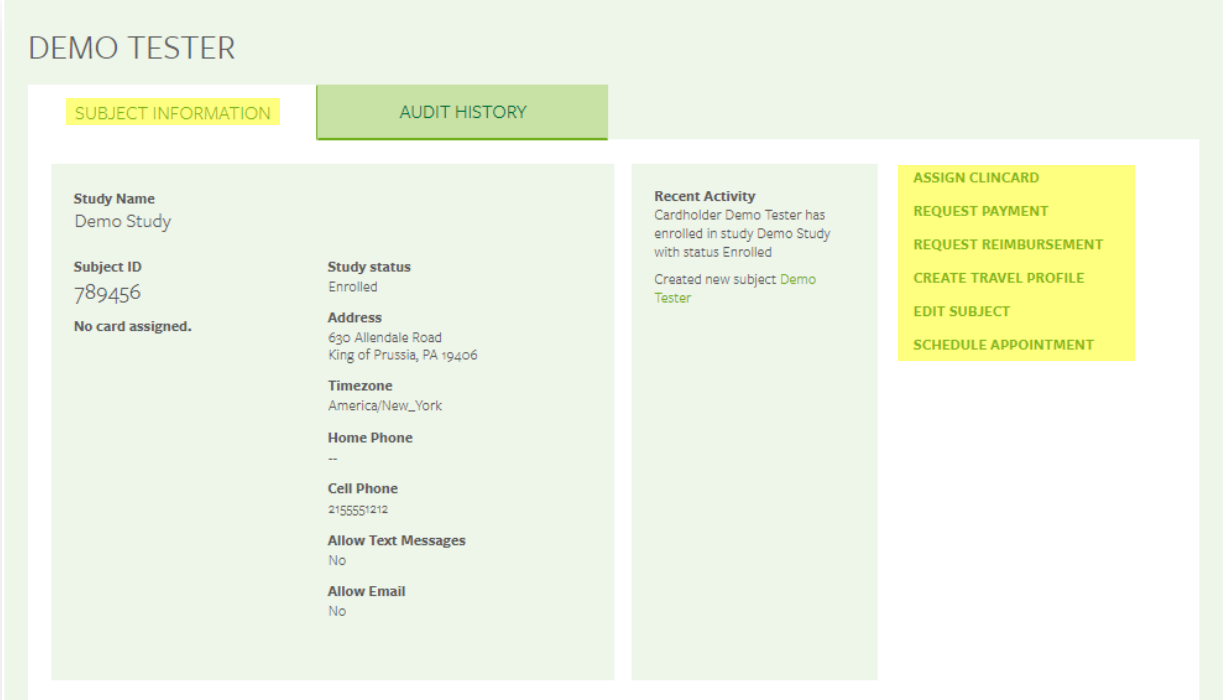
Subject Home Phone      Subject Cell Phone

ex: 215-555-1212      ex: 215-555-1212       Enable Text Messaging

**REGISTER**

- 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**.

- 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.



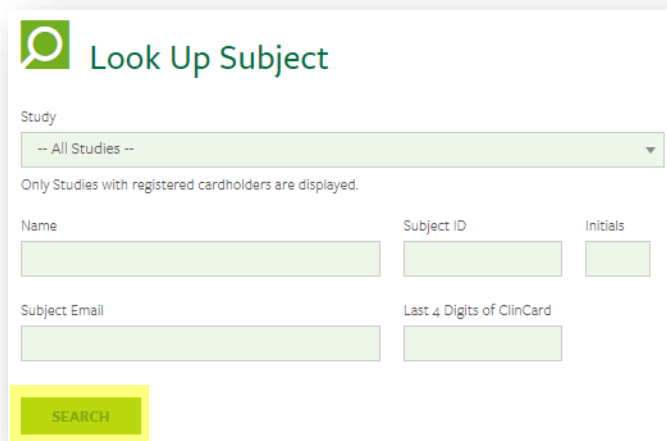
The screenshot shows the "Subject Information" screen for a subject named "DEMO TESTER". At the top, there are two tabs: "SUBJECT INFORMATION" (highlighted in yellow) and "AUDIT HISTORY". The main content area is divided into three columns. The left column contains subject details: Study Name (Demo Study), Subject ID (789456), and a note that no card is assigned. The middle column lists personal and contact information: Study status (Enrolled), Address (630 Allendale Road, King of Prussia, PA 19406), Timezone (America/New\_York), Home Phone (none), Cell Phone (2155551212), and preferences for text and email messages (both set to No). The right column, titled "Recent Activity", shows that the cardholder has been enrolled in the study and a new subject profile was created. To the right of the main content area is a vertical yellow sidebar with five action buttons: "ASSIGN CLINCARD", "REQUEST PAYMENT", "REQUEST REIMBURSEMENT", "CREATE TRAVEL PROFILE", and "EDIT SUBJECT".

SUBJECT INFORMATION		AUDIT HISTORY
<b>Study Name</b> Demo Study		
<b>Subject ID</b> 789456	<b>Study status</b> Enrolled	<b>Recent Activity</b> Cardholder Demo Tester has enrolled in study Demo Study with status Enrolled
<b>No card assigned.</b>	<b>Address</b> 630 Allendale Road King of Prussia, PA 19406	Created new subject Demo Tester
	<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	

- 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**.



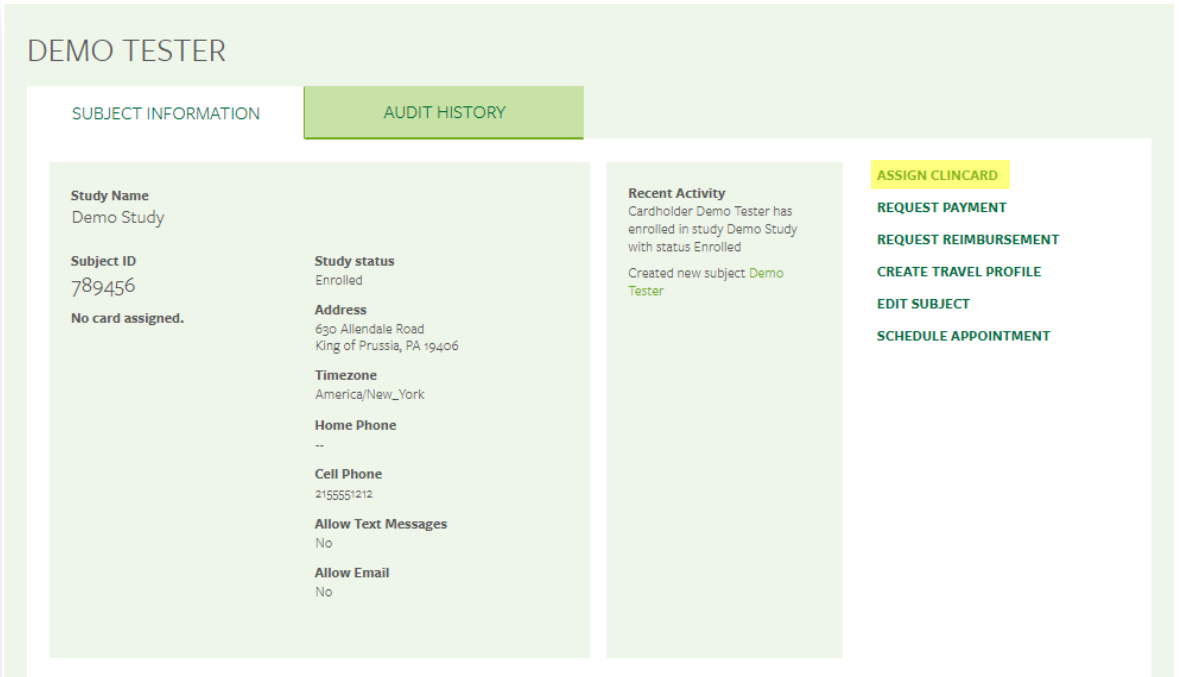
5. Results will appear below the “Search Results” header.
6. Click the hyperlink **Last Name** of the Subject.

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.

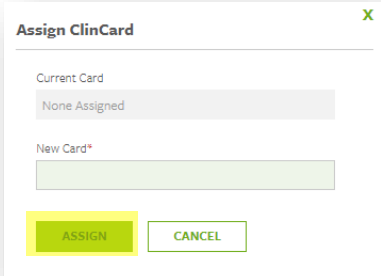


**DEMO TESTER**

SUBJECT INFORMATION    **AUDIT HISTORY**

<b>Study Name</b> Demo Study  <b>Subject ID</b> 789456  <b>No card assigned.</b>	<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> <b>SCHEDULE APPOINTMENT</b>
--	---	--	--

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\*  
[Input 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.

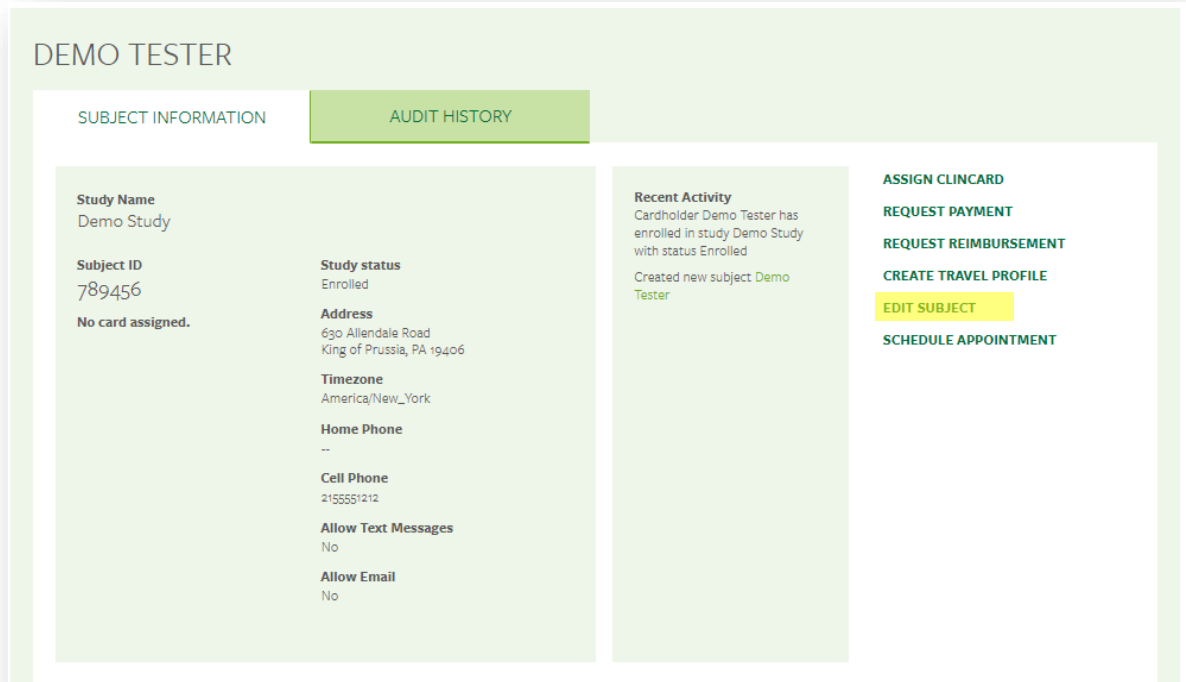
**Success!** The new card has been successfully assigned to Demo Tester. The new card will be active within 10 minutes. X

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  <b>No card assigned.</b>	<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 ▼

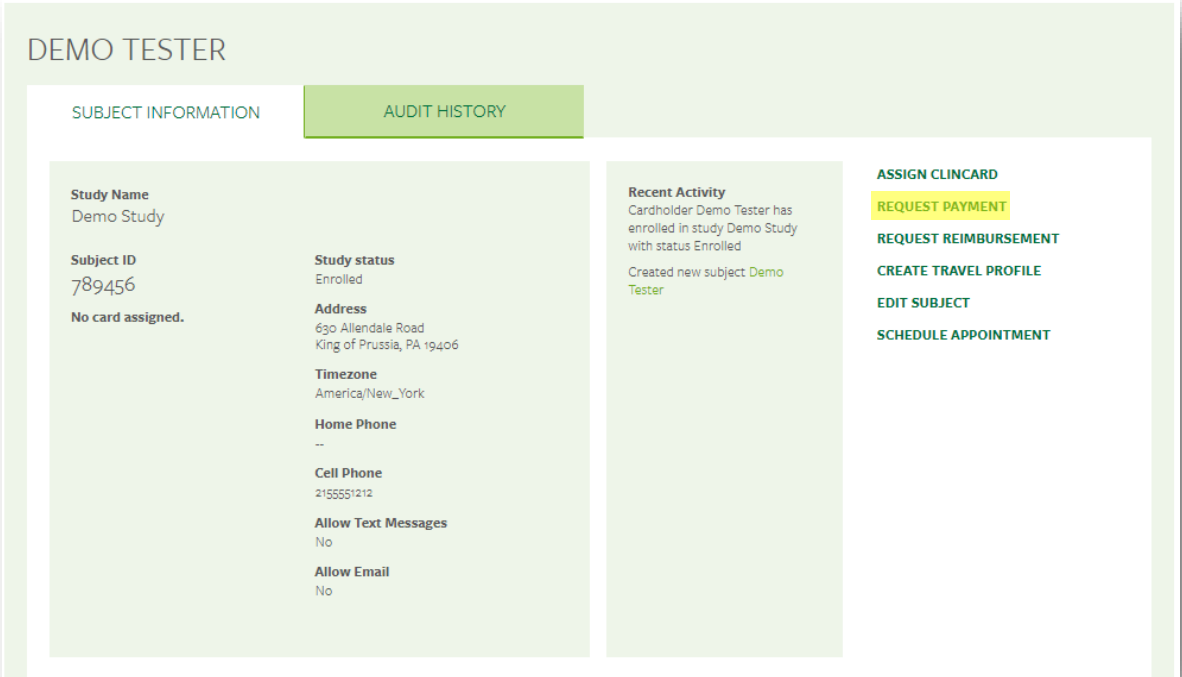
**+ ADD STUDY**

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

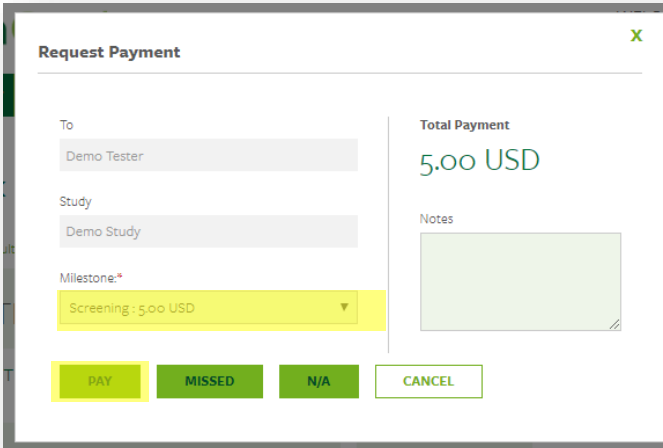


The screenshot shows a user interface for a subject named 'DEMO TESTER'. It features two tabs: 'SUBJECT INFORMATION' and 'AUDIT HISTORY'. The 'SUBJECT INFORMATION' tab is active and displays the following details:

- 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
- Recent Activity:** Cardholder Demo Tester has enrolled in study Demo Study with status Enrolled. Created new subject Demo Tester.

On the right side, there is a section titled 'ASSIGN CLINCARD' with a list of actions: **REQUEST PAYMENT** (highlighted in yellow), **REQUEST REIMBURSEMENT**, **CREATE TRAVEL PROFILE**, **EDIT SUBJECT**, and **SCHEDULE APPOINTMENT**.

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



The screenshot shows a 'Request Payment' pop-up window. It 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:** A text area for adding notes.
- Buttons:** PAY (highlighted in yellow), MISSED, N/A, and CANCEL.

4. Click **Pay**.

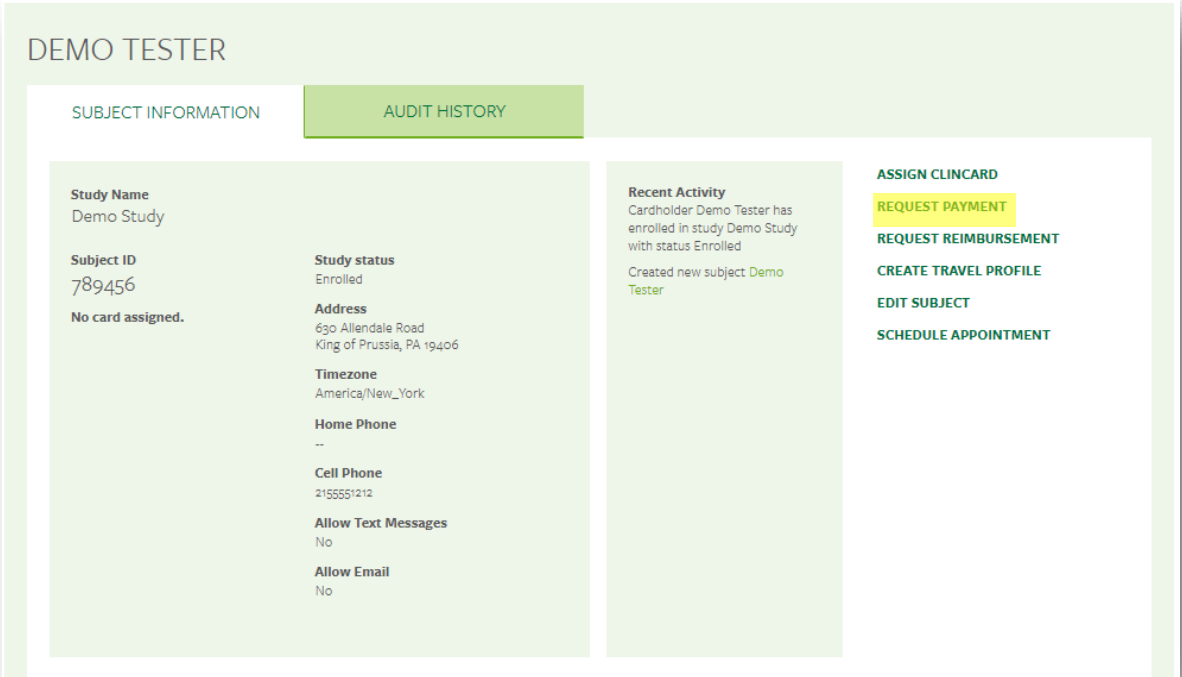
- a When a payment has successfully been requested, the “Pending Payments” area of the “Subject Information” screen will reflect the payment. It will also be reflected in your “Recent Activity” in the middle of the screen.
- b When a payment has been approved and processed, the amount will be removed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

SUBJECT INFORMATION	AUDIT HISTORY
<b>Study Name</b> Demo Study	
<b>Subject ID</b> 789456	<b>Study status</b> Enrolled
<b>Card Balance</b> ⓘ Available: 0.00 USD	<b>Address</b> 630 Allendale Road King of Prussia, PA 19406
<b>Pending Payments</b> 0.00 USD	<b>Timezone</b> America/New_York
<b>Card Number</b> XXXX-XXXX-XXXX-1703	<b>Home Phone</b> --
<b>Expiration Date</b> 28-FEB-2018	<b>Cell Phone</b> 2155551212
	<b>Allow Text Messages</b> No
	<b>Allow Email</b> No

- 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

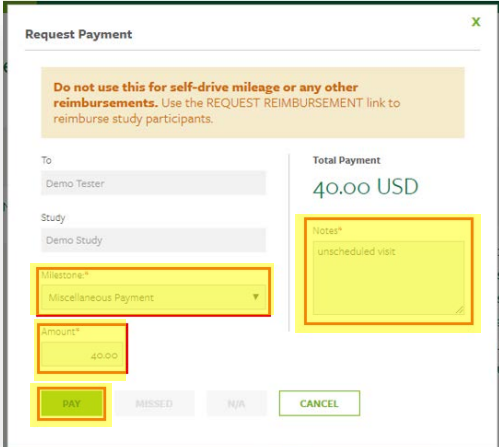
1. Click **Request Payment** and a pop-up screen will appear



The screenshot shows the 'DEMO TESTER' subject information 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
- 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 **“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**.

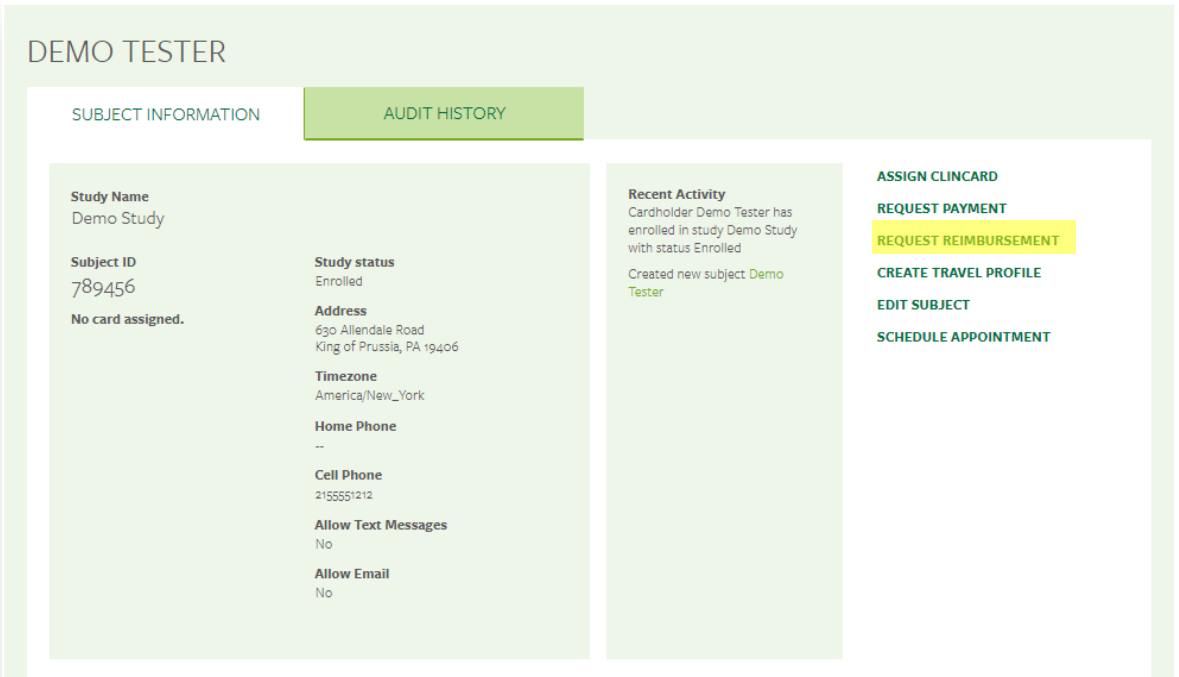


The screenshot shows the 'Request Payment' pop-up form. It includes a warning message: "Do not use this for self-drive mileage or any other reimbursements. Use the REQUEST REIMBURSEMENT link to reimburse study participants." The form fields are as follows:

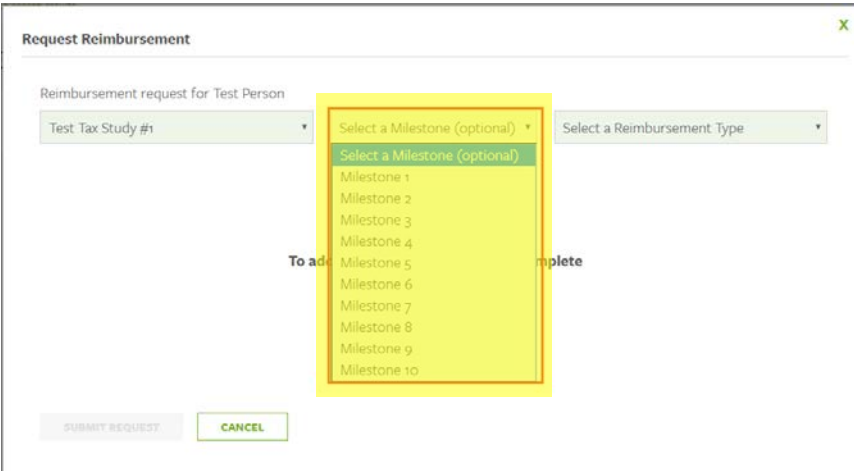
- To:** Demo Tester
- Study:** Demo Study
- Milestone\*:** Miscellaneous Payment (highlighted in yellow)
- Amount\*:** 40.00 (highlighted in yellow)
- Total Payment:** 40.00 USD
- Notes\*:** Unscheduled visit (highlighted in yellow)
- Buttons:** PAY (highlighted in yellow), MISSED, N/A, CANCEL

## Request a Reimbursement and Receipt Upload

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

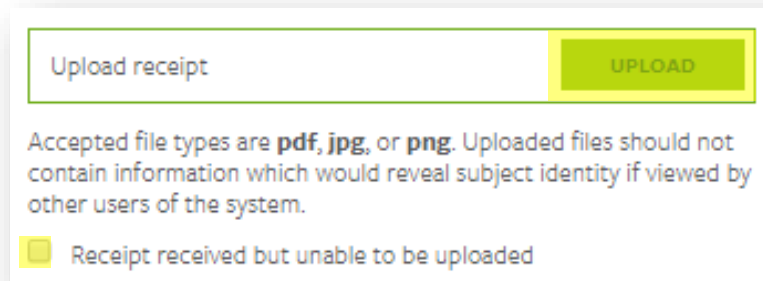


2. Select the milestone (if applicable) and reimbursement from the milestones drop-down menu.
  - a. Reimbursement options will show applicable to your study ONLY.



- 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.

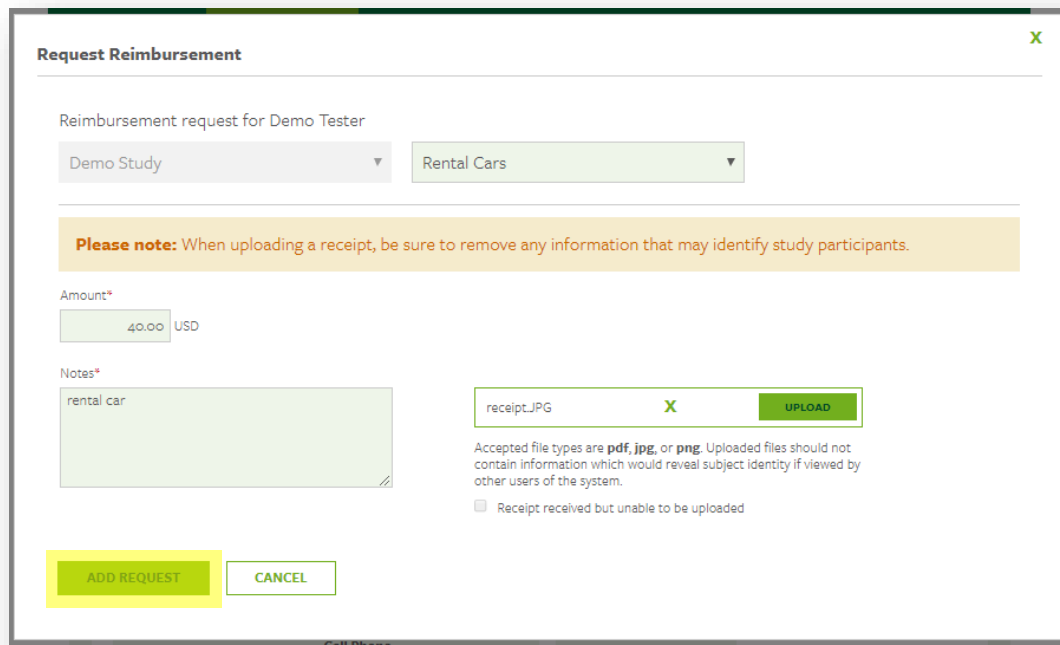


Upload receipt UPLOAD

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** X

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\*  
40.00 USD

Notes\*  
rental car

receipt.JPG X UPLOAD

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

ADD REQUEST CANCEL

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

**Request Reimbursement** X

Reimbursement request for Demo Tester

Demo Study Select a Reimbursement Type

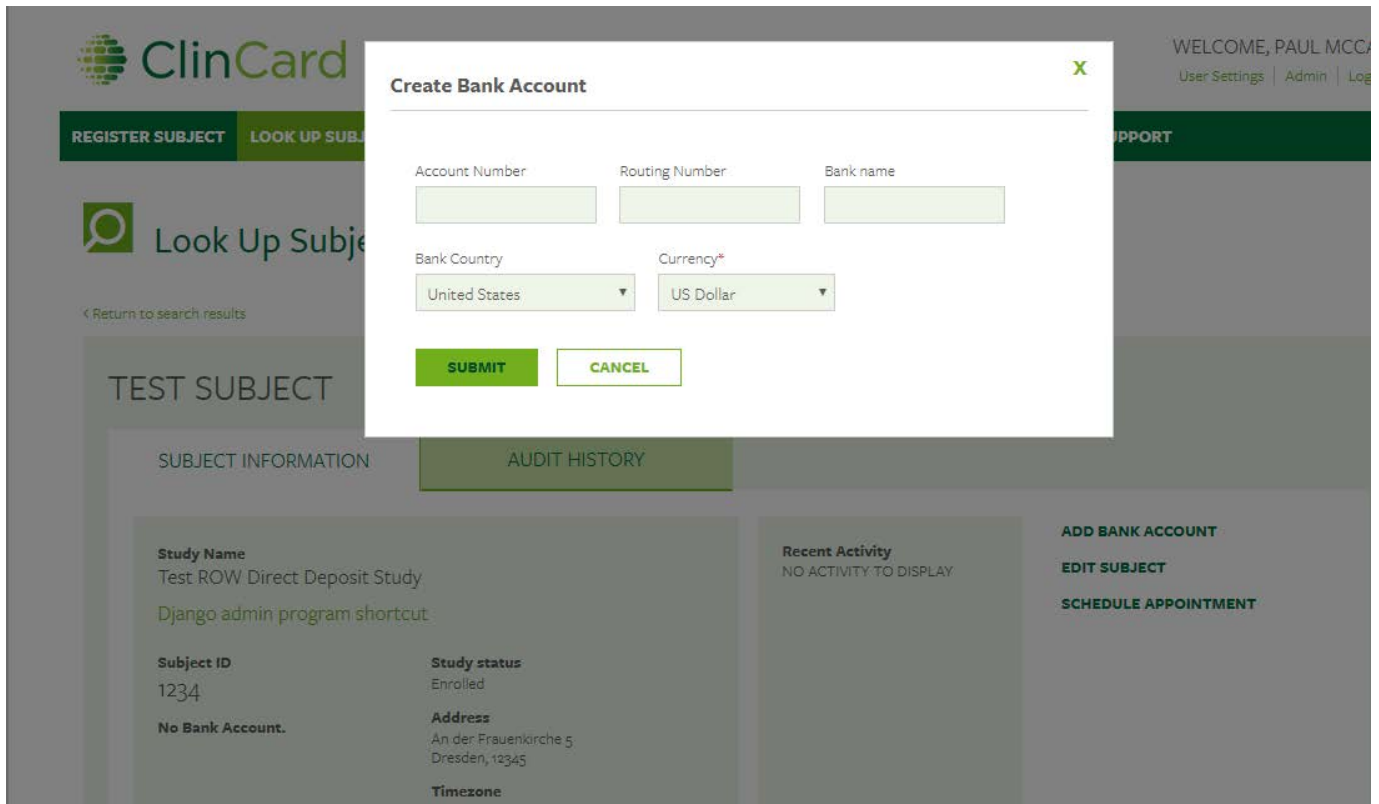
OTHER REIMBURSEMENT		5.00 USD
<b>Notes:</b> meal	<b>Receipt:</b> Receipt received but unable to be uploaded	
TAXI/RIDESHARE		10.00 USD
<b>Notes:</b> taxi	<b>Receipt:</b> Receipt received but unable to be uploaded	
RENTAL CARS		40.00 USD
<b>Notes:</b> rental car	<b>Receipt:</b> receipt.JPG	

**SUBMIT REQUEST** **CANCEL** TOTAL **55.00 USD**

- 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.



**Create Bank Account** X

Account Number      Routing Number      Bank name

Bank Country      Currency\*

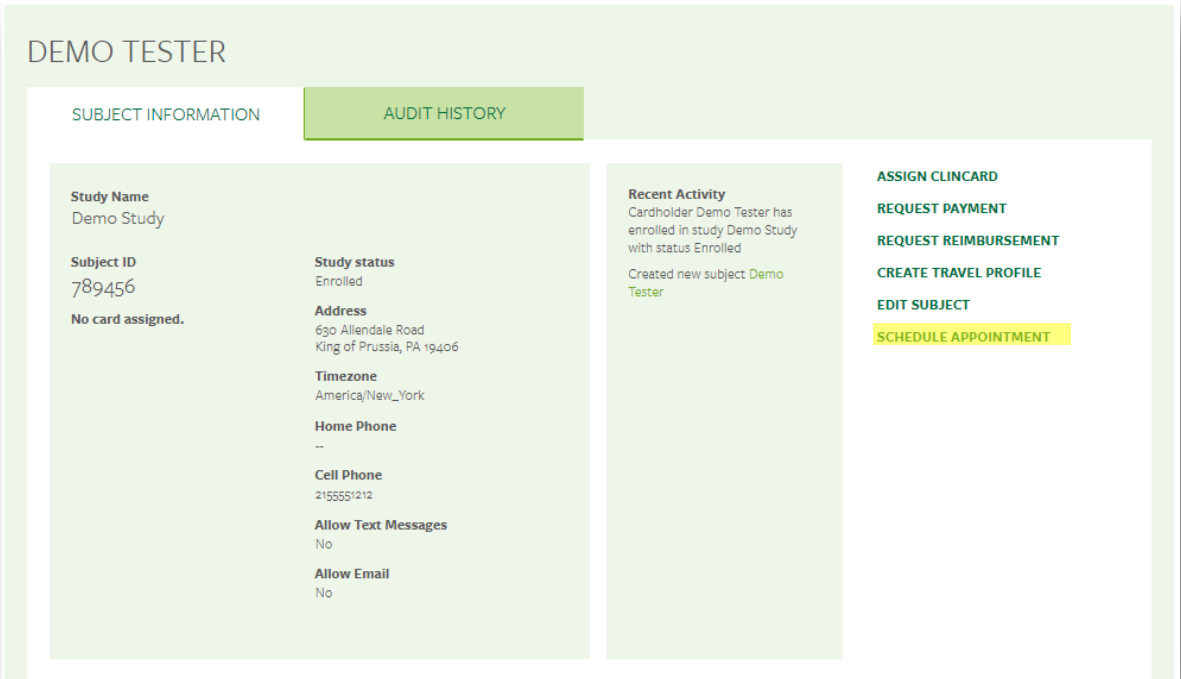
United States      US Dollar

**SUBMIT**      **CANCEL**

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.



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**

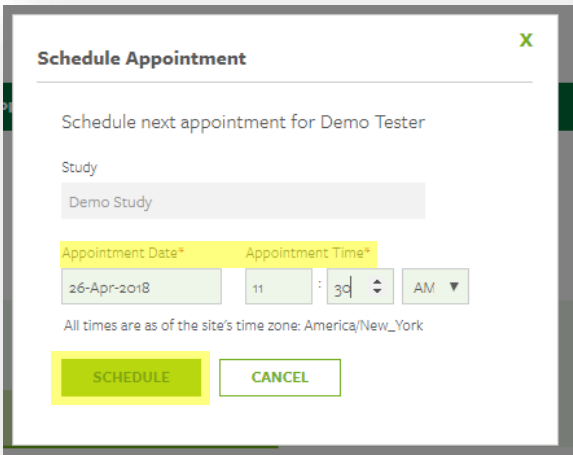
**REQUEST REIMBURSEMENT**

**CREATE TRAVEL PROFILE**

**EDIT SUBJECT**

**SCHEDULE APPOINTMENT**

2. Use the date and time picker to enter the Subject's next appointment.
3. Click **Schedule**



**Schedule Appointment** X

Schedule next appointment for Demo Tester

Study  
Demo Study

**Appointment Date\***    **Appointment Time\***

26-Apr-2018    11 : 30 AM

All times are as of the site's time zone: America/New\_York

**SCHEDULE**    **CANCEL**

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



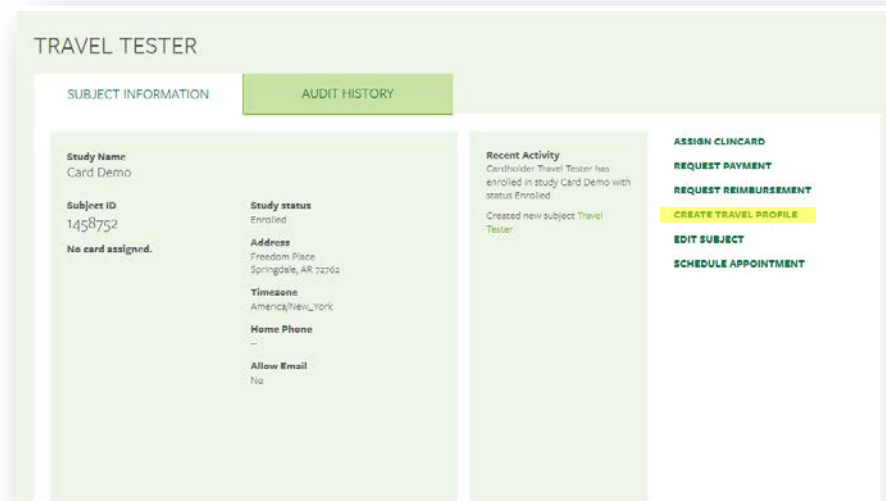
**Upcoming Appointments** Time zone: America/New\_York

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>

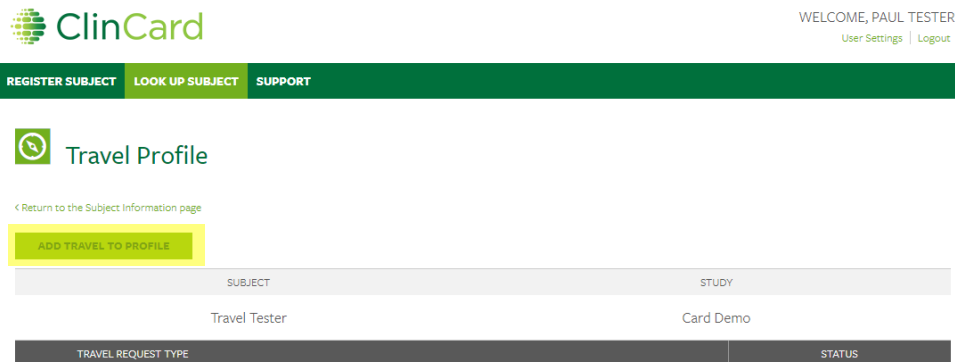
- a If the Subject has opted to receive email and/or text messages, they will receive a communication reminder three days and one day prior to the Subject's next appointment.

## Create a Travel Profile

1. Click **Create Travel Profile**.

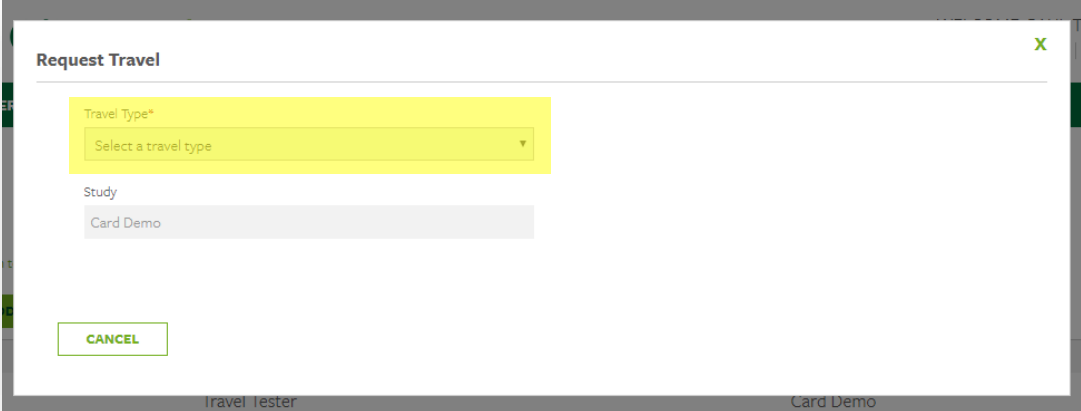


2. Click **Add Travel to Profile**.



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.



**Request Travel** X

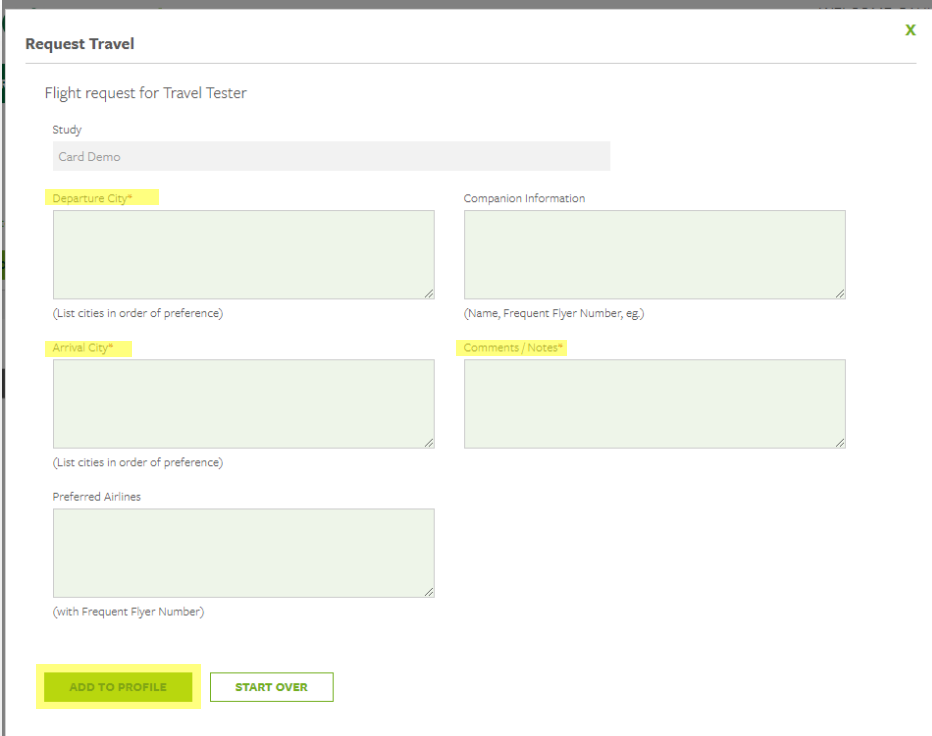
Travel Type\*  
 Select a travel type ▼

Study  
 Card Demo

**CANCEL**

Travel Tester Card Demo

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**.



**Request Travel** X

Flight request for Travel Tester

Study  
 Card Demo

**Departure City\*** Companion Information

(List cities in order of preference) (Name, Frequent Flyer Number, eg.)

**Arrival City\*** Comments / Notes\*

(List cities in order of preference)

Preferred Airlines

(with Frequent Flyer Number)

**ADD TO PROFILE** **START OVER**

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** X

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

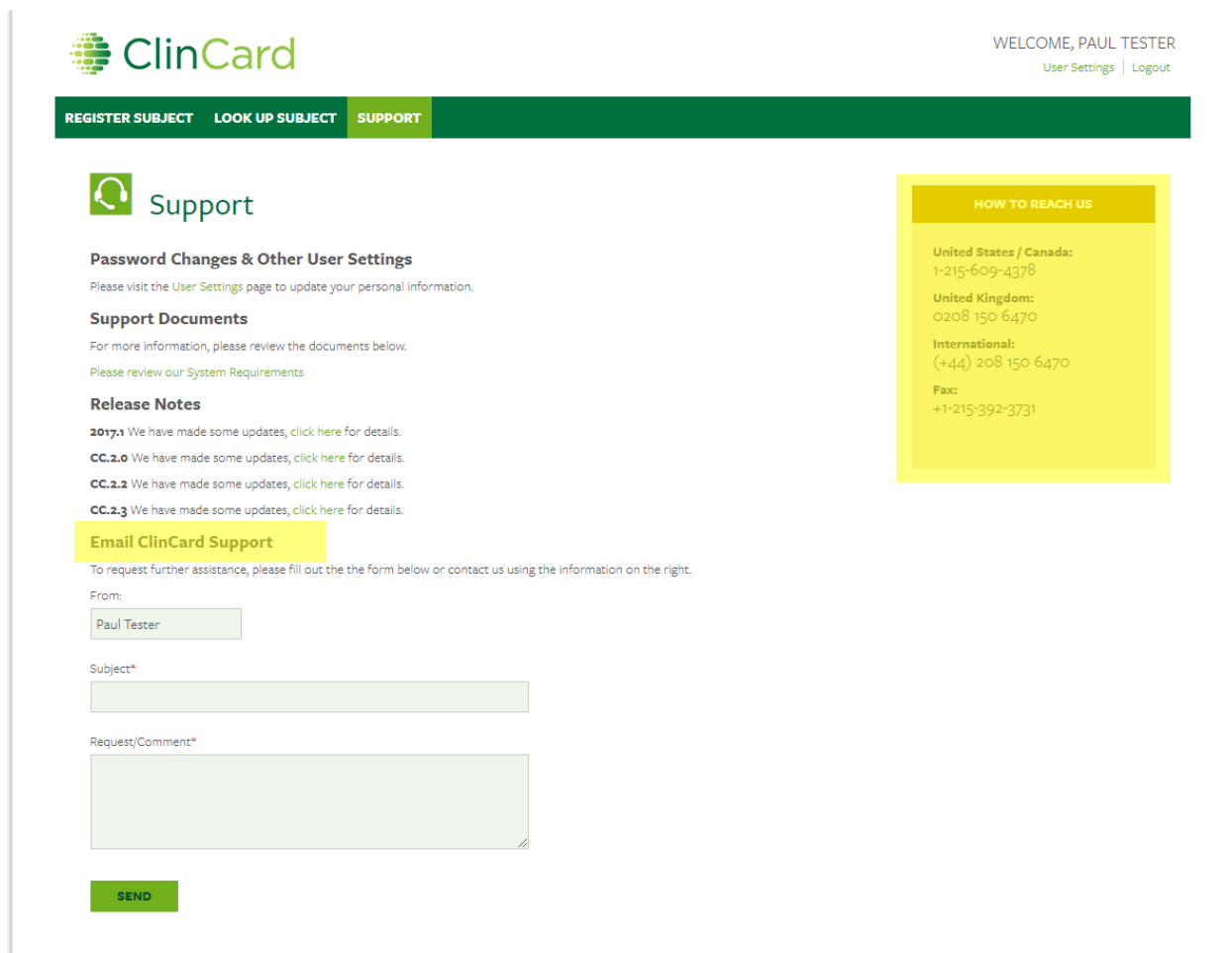
SUBJECT	STUDY
Travel Tester	Card Demo

TRAVEL REQUEST TYPE	STATUS
<div style="display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">+</span> Flight Request         </div>	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". Below this is a navigation bar with three tabs: "REGISTER SUBJECT", "LOOK UP SUBJECT", and "SUPPORT" (which is highlighted). The main content area is titled "Support" with a headset icon. It contains several sections: "Password Changes & Other User Settings" with a link to the User Settings page; "Support Documents" with a link to System Requirements; and "Release Notes" with links for versions 2017.1, CC.2.0, CC.2.2, and CC.2.3. A yellow box highlights the "Email ClinCard Support" section, which includes a form with fields for "From:" (pre-filled with "Paul Tester"), "Subject\*", and "Request/Comment\*", and a "SEND" button. To the right of the form is a yellow box titled "HOW TO REACH US" containing contact information for the United States/Canada, United Kingdom, International, and Fax.