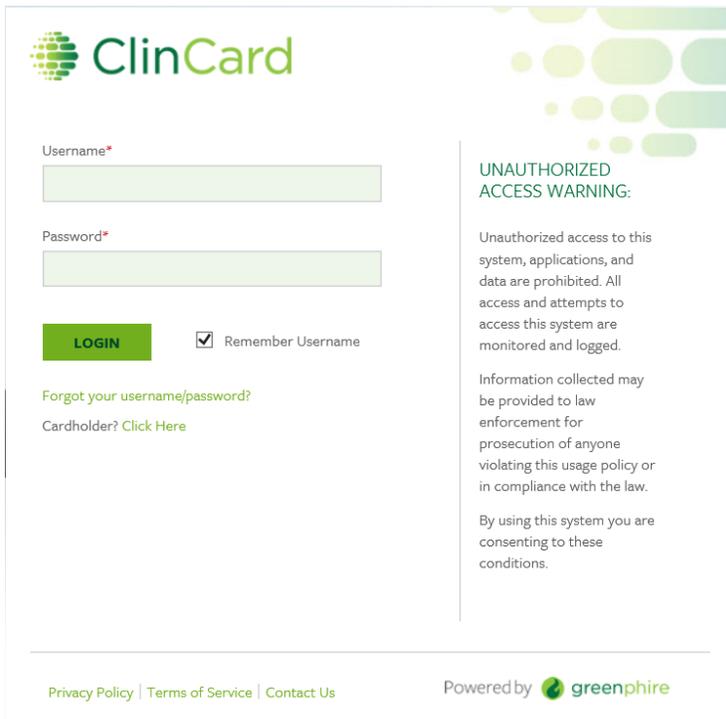


ClinCard Reference Guide: Site Coordinator

► How to Login to www.clincard.com

- 1) Login to www.clincard.com.



The screenshot shows the ClinCard login interface. On the left, there is a login form with the following elements: the ClinCard logo, a 'Username*' input field, a 'Password*' input field, a green 'LOGIN' button, and a checked checkbox for 'Remember Username'. Below the form are links for 'Forgot your username/password?' and 'Cardholder? Click Here'. On the right, there is a 'UNAUTHORIZED ACCESS WARNING' section with text stating that unauthorized access is prohibited and monitored, and that information collected may be provided to law enforcement. At the bottom, there are links for 'Privacy Policy | Terms of Service | Contact Us' and a 'Powered by greenphire' logo.

- 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 Greenphire’s site support team at 215-609-4378.

► How to Look Up a Subject - **Always Do This Step First**

- 1) Login to www.clincard.com.
- 2) If you are a Site Coordinator, the first window you see after login should be the Look Up Subject window. If not, you can click on “Look Up Subject” in the toolbar.

 Look Up Subject

Study
-- All Studies --

Only Studies with registered cardholders are displayed.

Name	Subject ID	Initials
<input type="text"/>	<input type="text"/>	<input type="text"/>
Subject Email	Last 4 Digits of ClinCard	
<input type="text"/>	<input type="text"/>	

SEARCH

- 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 or last name
 - b. Subject ID
 - c. Subject’s initials
 - d. Subject’s e-mail address
 - e. Last four digits of the ClinCard assigned to the subject

- If the subject is found, click on the highlighted name of the Subject



[REGISTER SUBJECT](#)
[LOOK UP SUBJECT](#)
[ADMIN](#)
[REPORTS](#)
[SUPPORT](#)

Look Up Subject

Study

-- All Studies --

Only Studies with registered cardholders are displayed.

Name	Subject ID	Initials
<input type="text" value="taylor"/>	<input type="text"/>	<input type="text"/>
Subject Email	Last 4 Digits of ClinCard	
<input type="text"/>	<input type="text"/>	

SEARCH

Search Results

1 records found

SEARCH:

LAST NAME	FIRST NAME	LAST FOUR	LOCATION	STUDY
Taylor	Melissa	9775	UAB All Study (Central)	00 - ALL STUDY - UAB

- The "Subject Information" screen will open where you can perform any of the actions required for the subject, e.g., add another study or issue payment.

 Look Up Subject

[Return to search results](#)

MELISSA TAYLOR

SUBJECT INFORMATION
AUDIT HISTORY

<p>Study Name oo - ALL STUDY - UAB</p> <p>Subject ID --</p> <p>Card Balance ⓘ --</p>	<p>Study status Enrolled</p> <p>Address 701 20th Street South Birmingham, AL 35233</p>	<p>Recent Activity Cardholder Melissa Taylor has enrolled in study oo - ALL STUDY - UAB with status Enrolled Created new subject Melissa Taylor :</p>	<p>REPLACE CLINCARD</p> <p>REQUEST PAYMENT</p> <p>REQUEST REIMBURSEMENT</p> <p>EDIT SUBJECT</p> <p>SCHEDULE APPOINTMENT</p>
---	--	---	--

- 6) If the subject already exists in the system and has been enrolled in the 00 - ALL STUDY - UAB, then skip to the section on “How to Register a Subject in an Additional or Extension Study.”
- 7) If the subject cannot be found, then you must follow the next steps and register that subject in the 00 - ALL STUDY - UAB, first.

► How to Register a Subject

- 1) Login to www.clincard.com.
- 2) If you have already searched for a Subject (see previous directions) and know that they are not yet in the system, click on “Register Subject” in the toolbar.



- 3) From the “Select Study” drop-down menu, choose “00 - ALL STUDY – UAB” (all UAB patients/subjects MUST be entered in this study, first).

 **Subject Registration**

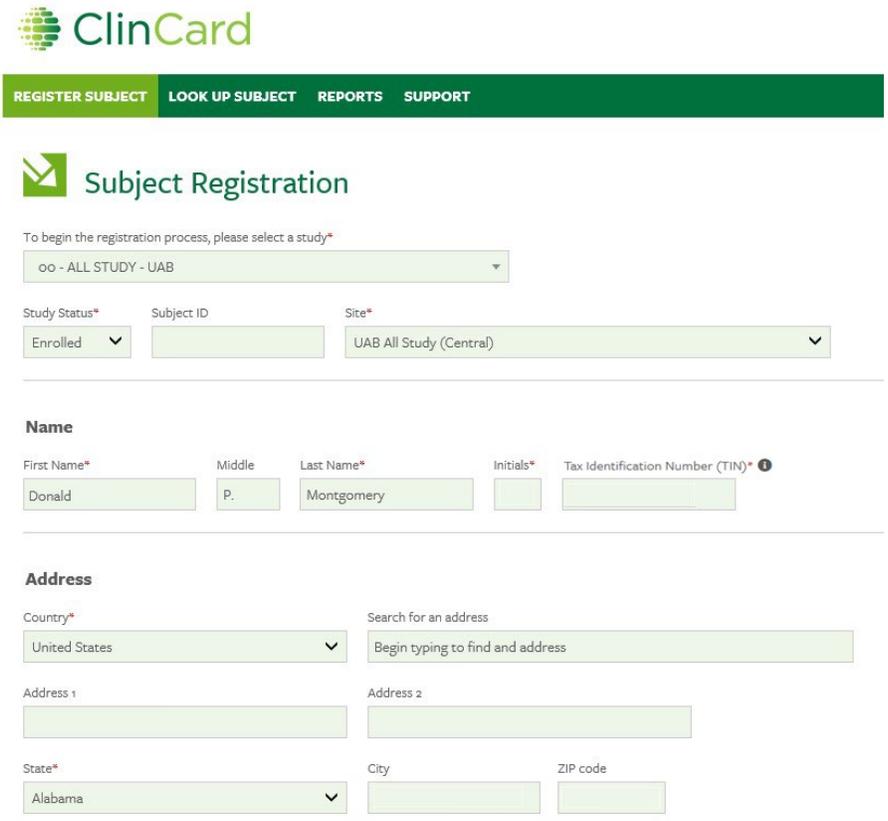
To begin the registration process, please select a study*

-- Select Study --

oo - ALL STUDY - UAB

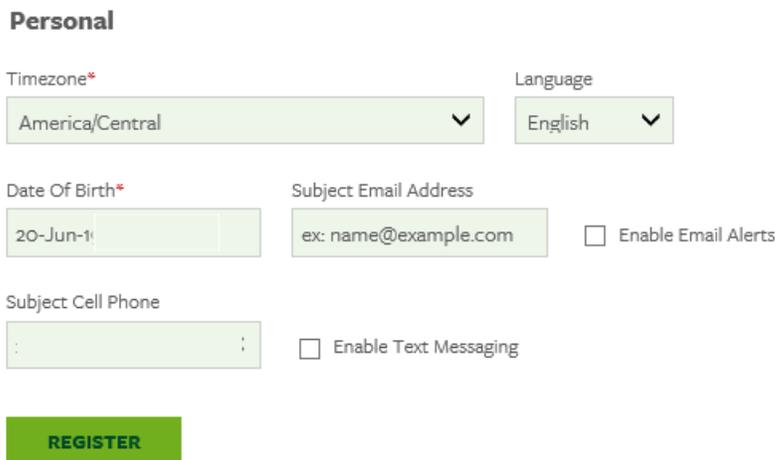
- 4) Enter the required information into the brief form. At minimum, you must include the subject’s first name, last name, initials, SSN (referred to as TIN in the system), address, and DOB. *There is no Subject ID for the 00-ALL STUDY UAB study.*

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.



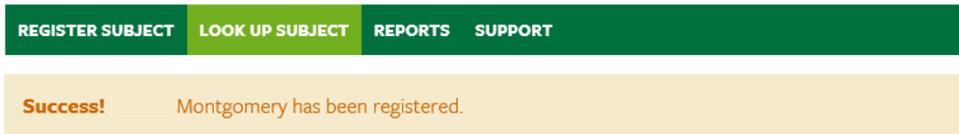
The screenshot shows the ClinCard Subject Registration page. At the top, there is a navigation bar with options: REGISTER SUBJECT, LOOK UP SUBJECT, REPORTS, and SUPPORT. Below this is the 'Subject Registration' header with a green checkmark icon. The form includes a dropdown for 'Study' (selected as '00 - ALL STUDY - UAB'), 'Study Status' (selected as 'Enrolled'), 'Subject ID' (empty), and 'Site' (selected as 'UAB All Study (Central)'). The 'Name' section has fields for First Name (Donald), Middle (P.), Last Name (Montgomery), Initials (empty), and Tax Identification Number (TIN) (empty). The 'Address' section includes Country (United States), a search bar for an address (beginning with 'Begin typing to find and address'), Address 1, Address 2, State (Alabama), City, and ZIP code.

- 5) Click on the “Register” button at the bottom of the Subject Registration page.



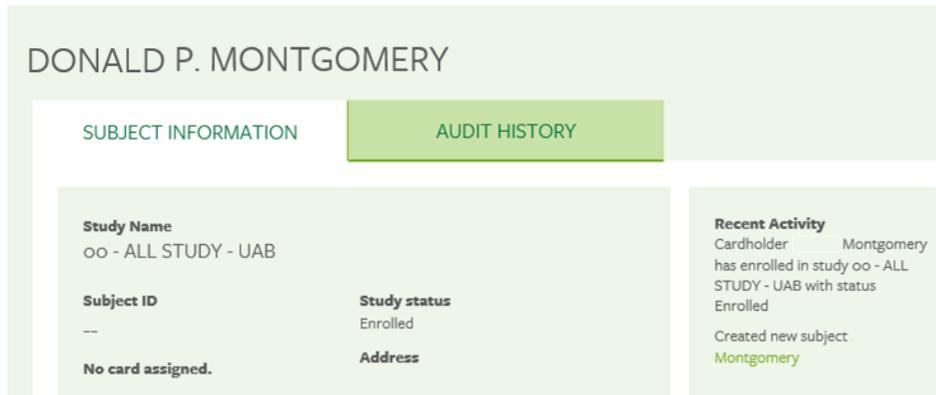
The screenshot shows the 'Personal' section of the form. It includes 'Timezone' (selected as 'America/Central') and 'Language' (selected as 'English'). Below these are 'Date Of Birth' (20-Jun-1) and 'Subject Email Address' (ex: name@example.com) with a checkbox for 'Enable Email Alerts'. The 'Subject Cell Phone' field is empty with a checkbox for 'Enable Text Messaging'. At the bottom is a green 'REGISTER' button.

- 6) The “Subject Information” screen will open where you can enroll the subject in your study, assign a ClinCard, make a payment, schedule an appointment reminder, replace a ClinCard or edit a subject’s information.



Look Up Subject

[Return to search results](#)



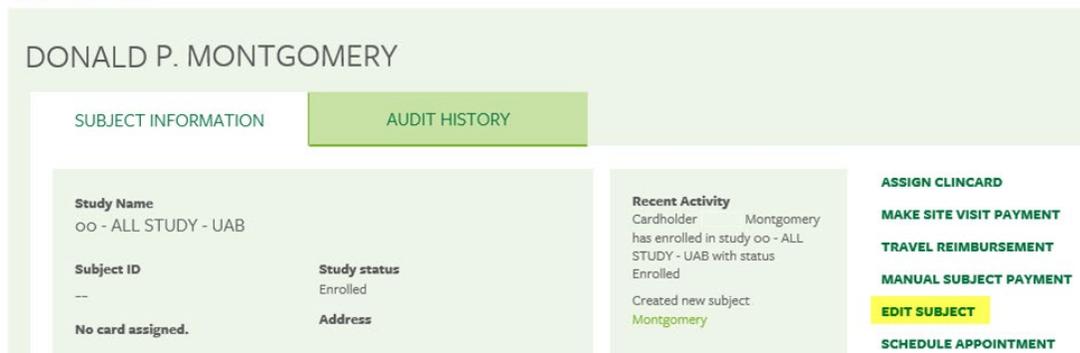
- 7) If you have difficulty making a payment for the first time please call the ClinCard site support team at 215- 609-4378 and Greenphire staff will be happy to walk you through it.

► How to Register a Subject in an Additional or Extension Study

- 1) Locate the existing “Subject Information” page through the “Look Up Subject” menu tab and clicking on the last name of the subject to open the participant’s subject information tab. (If you have just enrolled the subject in the 00-ALL STUDY UAB, you should be on the correct page.)
- 2) Click on the **Edit Subject** option in the list to the right

Look Up Subject

[Return to search results](#)



3) Click on the **Add Study** link located under the list of the subject's current study(ies)



REGISTER SUBJECT LOOK UP SUBJECT REPORTS SUPPORT

Edit Subject Information

Study Membership

Study*	Subject ID	Subject Status*
oo - ALL STUDY - UAB		Enrolled

[+ ADD STUDY](#)

and select your study from the drop-down menu

Study Membership for UAB All Study (Central)

Study*	Sut
oo - ALL STUDY - UAB	<input type="checkbox"/>
Study*	Sut
-- Select Study --	<input type="checkbox"/>
311600000 - 2013127 - 131223001	<input type="checkbox"/>
311600000 - 2014043 - 141024002	<input type="checkbox"/>
311600000 - 2015336 - 150826004	<input type="checkbox"/>
311600000 - 2017540 - 170615010	<input type="checkbox"/>

- 4) Enter the new **Subject ID** (this should be specific to your study) and enter or select the **Subject Status**.



Edit Subject Information

Study Membership for UAB All Study (Central)

Study*	Subject ID	Subject Status*
oo - ALL STUDY - UAB		Enrolled
Study*	Subject ID*	Subject Status*
311600000 - 2013127 - 131223001	AFD079	Enrolled

- 5) Scroll to the bottom of the page, and click “Save.”

This will enroll the subject in your study in addition to the 00-ALL STUDY UAB in which all subjects must be enrolled, first.

► How to Assign a ClinCard to a Subject:

Once you have selected an existing subject or registered a new subject, the “Subject Information” screen will open. On the right hand side of the screen, you will see options that represent all of the actions you can perform on the Subject.

Note: If the subject already has a ClinCard assigned, you should not assign another card. (You can tell the subject already has a ClinCard if the first option in the list of options to the right-hand side of the screen is “Replace ClinCard” instead of “Assign ClinCard.”)



Look Up Subject

[Return to search results](#)

RACHEL TAYLOR

SUBJECT INFORMATION
AUDIT HISTORY

Study Name
oo - ALL STUDY - UAB

Subject ID
--

Participant Code
--

No card assigned.

Study status
Enrolled

Address
349 Pine Mountain Road
Remlap, AL 35133

Timezone
US/Central

Home Phone
--

Recent Activity

Changed Rachel Taylor subject information

Cardholder Rachel Taylor has enrolled in study 311600000 - 2013127 - 131223001 as Subject ID AFD079 with status Enrolled

Changed Rachel Taylor subject information

ASSIGN CLINCARD

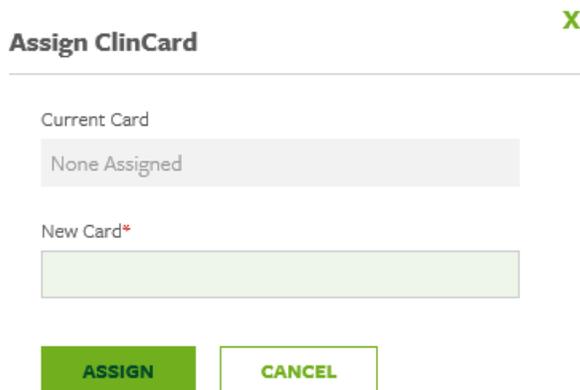
REQUEST PAYMENT

REQUEST REIMBURSEMENT

EDIT SUBJECT

SCHEDULE APPOINTMENT

- 1) Click on “Assign ClinCard” and a pop-up screen will appear.



Assign ClinCard X

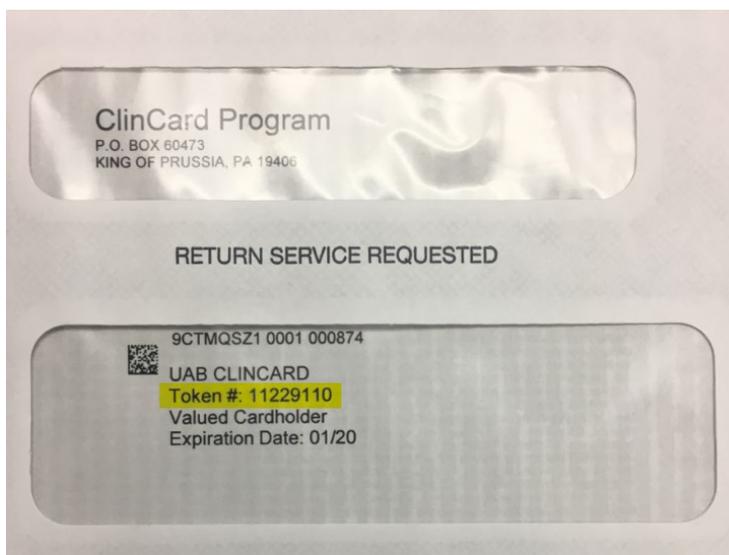
Current Card
None Assigned

New Card*

ASSIGN **CANCEL**

- 2) In the “New Card” field, enter the 8-digit token 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

Success! The new card has been successfully assigned to Rachel Taylor. The new card will be active within 10 minutes. X

 Look Up Subject

[Return to search results](#)

RACHEL TAYLOR

SUBJECT INFORMATION
AUDIT HISTORY

Study Name

00 - ALL STUDY - UAB ▼

Subject ID

Study status

Enrolled

Address

Recent Activity

Assigned card X-9110 to Rachel Taylor

Changed Rachel Taylor subject information

Cardholder Rachel Taylor has enrolled in study 31660000 -

REPLACE CLINCARD

REQUEST PAYMENT

REQUEST REIMBURSEMENT

EDIT SUBJECT

SCHEDULE APPOINTMENT

- 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 the 8 digit token 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 Request a 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.

Note: If the subject has a ClinCard assigned, follow the next steps. If the subject has no ClinCard assigned, see the previous “How to Assign a ClinCard to a Subject” instruction section.

- 1) Verify that the “Study Name” field displays the name of the study for which you wish to make a payment. If the subject is enrolled in more than one study, you may have to select your study from the “Study Name” drop-down menu

 Look Up Subject

[Return to search results](#)

RACHEL TAYLOR

SUBJECT INFORMATION
AUDIT HISTORY

Study Name

Recent Activity

Assigned card X-9110 to Rachel Taylor

[REPLACE CLINCARD](#)

REQUEST PAYMENT

[REQUEST REIMBURSEMENT](#)

2) Click on “Request Payment” and a pop-up screen will appear

Request Payment X

To

Study*

Milestone:*

Total Payment

0.00 USD

Notes

PAY
MISSED
N/A
CANCEL

3) Select from the dropdown box which milestone the patient is being paid, e.g., Visit 1, Visit 2, etc.

Request Payment X

To

Study*

Milestone:*

Screening: 50.00 USD

--SELECT MILESTONE--

Screening: 50.00 USD

Troubleshoot 1: 15.00 USD

Troubleshoot 2: 15.00 USD

Troubleshoot 3: 15.00 USD

Troubleshoot 4: 15.00 USD

6 Month: 500.00 USD

Early Termination: 100.00 USD

Total Payment

50.00 USD

Notes

PAY
MISSED
N/A
CANCEL

- Click on the "Pay" button.

Request Payment
X

To

Study*

Milestone:*

Total Payment

50.00 USD

Notes

PAY

MISSED

N/A

CANCEL

- 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"

SUBJECT INFORMATION
AUDIT HISTORY

Study Name

Subject ID

--

Participant Code

--

Card Balance ⓘ

Available: 0.00 USD

Pending Payments

50.00 USD

Study status

Enrolled

Address

Timezone

America/New_York

Home Phone

--

- 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

- 7) If the subject has opted to receive email and/or text messages, the Subject will receive a payment confirmation communication when the payment is approved and has been loaded to the card

► 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
- 2) Directly emailing us at support@greenphire.com
- 3) Calling our site support team directly at 215-609-4378 between the hours of 8:00AM and 10:00PM Eastern Time (Monday through Friday) in order to speak with a ClinCard team member

► Frequently Asked Questions

Q: How is the ClinCard used by participants?

A patient can use their ClinCard for:

1. *In-Store Purchases, selecting either “Credit” or “Debit” (“Debit” option requires PIN)*
 - *Using the “Debit” option will allow patients to select “cash back” option*
2. *Online Purchases*
3. *Cash Withdrawals at ATMs (requires PIN)*
4. *Cash Advances at Banks*
 - *Patient must know the available balance on the card and inform the teller of the amount they would like to withdraw. Tellers are unable to check your balance.*
 - *Patient presents the teller with their signed ClinCard and a valid government-issued photo ID*
 - *The ClinCard is accepted at all MasterCard member banks (look for a MasterCard logo on the bank window/entrance)*

Q: Is there a fee for withdrawing amounts at an ATM?

If a patient would like the convenience of using the ClinCard at an ATM, they will be subject to fees which vary based on location.

However, there are alternate methods that a patient can get cash without incurring any fees: A) By presenting their ClinCard, along with a valid state ID, to a teller at a bank, or B) Selecting the “cash back” option when making an in-store “debit” purchase.

Q: Can the debit card be used as a credit card?

Yes. At the terminal a patient may press “credit,” which allows them to sign for the transaction rather than enter a PIN. However, some terminals will automatically request a PIN once a card has been swiped. In such cases, the patient should either press “cancel” to be able to sign or tell the cashier they want to sign for their transaction.

Q: How does a patient activate their ClinCard?

The ClinCard is active once the first payment is loaded. The patient will need to sign the back of their card and then can immediately begin using it by selecting the “credit” option in stores or online.

Q: How do I request more ClinCards?

Please send an e-mail request with Greenphire Card Request as the subject line to Grants Accounting at FA-grantsaccting@mail.ad.uab.edu. In the body of the e-mail, be sure to include the number of cards needed as well as the 9-digit org code for the department/division/center housing the study.

Q: How does a patient obtain their PIN?

The patient needs to call Customer Service at 1-866-952-3795 and follow the prompts through the IVR:

- 1) Press 1 for English or 2 for Spanish*
- 2) Press 2 (to activate card & for account information)*
- 3) Enter your 16-digit card number, followed by the “#” sign*
- 4) Enter 3-digit security number (located on the back of card), followed by the “#” sign*
- 5) Enter a 4-digit PIN of your choosing, followed by the “#” sign*
- 6) Re-enter the same 4-digit PIN as confirmation, followed by the “#” sign*

Q: What happens if a patient loses their ClinCard?

The patient should notify the site and the study coordinator will be able to replace it for them. By replacing the card in the ClinCard Portal, the old card will automatically be inactivated, rendering it unusable. Additionally, any funds remaining on the old card will automatically be transferred onto the new card.

Alternatively, the patient can call customer service to replace their card, however, there is a \$7.00 fee for replacement and it will take 7-10 days to receive by mail.

Q: What contact information is required to register a patient?

We require the following data fields be populated in order to register a patient and assign them a ClinCard:

- *Subject ID*
- *Name*
- *Initials*
- *Address*
- *Date of Birth (DOB)*
- *Social Security Number*

However, if a patient opts-in to receive messaging, which is not required, an email address and/or cell phone number will be required, depending on the method of contact they prefer. The patient can opt-out of messaging at any time, allowing the email address and/or cell phone number to be permanently deleted from the system.

All patient information is stored in a secure fashion and data is never shared with parties outside of Greenphire. Information collected is used when booking travel and by customer service in order to securely verify a patient’s identity when calling for assistance.

Q: What if a payment is made in error?

If a payment is made in error, immediately contact site support at support@greenphire.com or 215-609-4378, and Greenphire can void the payment and remove the funds from the ClinCard. However, if the funds have already been spent, there is no way to void the payment and remove the funds.

Q: What should I do with unused/unissued ClinCards?

If you have unused/unissued ClinCards, and have no other studies in your area that could use them, please return them to Grants Accounting, AB 990.