

## ClinCard Reference Guide: Site Coordinator

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### ► How to Login to [www.clincard.com](http://www.clincard.com)

- 1) Visit [www.clincard.com](http://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](http://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 email Research Business Information Systems ([RBI@bmc.org](mailto:RBI@bmc.org)) for user login assistance, or contact ClinCard site support at 215-609-4378.

### ► How to Search for and/or Register a Subject/Participant

#### I. Check if the Participant has already been registered in ClinCard:

- 1) Login to [www.clincard.com](http://www.clincard.com)
- 2) In the “Lookup Subject” screen, search for the Participant by filling out any of the following fields:
  - a. First name and/or last name
  - b. Subject ID
  - c. Subject’s initials
  - d. Subject e-mail
  - e. Last 4 digits of ClinCard

**[Note:** All registered participants will be part of one central study named “1\_BMC Participants”]

- 3) Click ‘Search’:
  - a. If the participant **is not found**, continue to part II ‘Register a new Participant...’ to register them in the central study “1\_BMC Participants”.
  - b. **If found**, continue to part III ‘Add a Study to a Registered Participant...’

#### II. Register a new Participant in “1\_BMC Participants”:

- 1) Collect the completed ClinCard Participant Information Form (CPIF) from the Participant
- 2) Click on “Register Subject”
- 3) You will be brought to the ‘Subject Registration Page’
- 4) Fill out the four fields at the top of the page :
  - a. Subject ID : If participant is registered in VelosCT, use the VCT # (helps reconciliation of payments and completed events); otherwise, fill in a generic study Subject ID (e.g. ‘Participant Initials\_001’)
  - b. Study ID : Choose the central study titled “1\_BMC Participants”
  - c. Subject Status : Select ‘Enrolled’
  - d. Site: Select ‘BMC’
- 5) Then complete the remaining participant demographic fields and click the ‘Register’ button:
  - a. **Note:** If the Participant wants to receive payment confirmations or appointment reminders, be sure the “Email (Enable)” and/or “Text Messaging (Enable)” checkboxes are selected.
- 6) You will now add your study to register the participant, please see part III ‘Add a Study to a Registered Participant...’ **steps 2-7**.

### III. Add a Study to a Registered Participant

- 1) Once the participant **is found**, click on their underlined last name.
- 2) You are now on the “Subject Information” screen. Click on the ‘Edit Subject’ button on the right.
- 3) You will be brought to a new page to add the participant to your study.
- 4) Click on the ‘Add Study’ link in the right corner and three new fields will now appear under ‘Study Membership’:
  - a. Subject ID : **Fill in applicable Study Subject ID (Used for tracking on this Study)**
  - b. Study ID : **Choose your study from the drop down menu**
    - i. Note: Only your assigned studies will be visible selections.
  - c. Subject Status : **Select ‘Enrolled’**
- 5) Scroll to the bottom of the page and click ‘Save’.
- 6) You will be brought back to the “Subject Information” screen where you can now see your new study added for the participant under ‘Study Info’. From here you can also assign a card number, make a payment, schedule an appointment reminder or replace a ClinCard.
- 7) If you have difficulty making a payment for the first time please contact your Senior Clinical Trial Financial Analyst in the [BMC Clinical Trial Office \(CTO\)](#) first. Additional assistance is also available via ClinCard site support at 215-609-4378

### ► How to Assign a ClinCard to a Participant/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) Give the new ClinCard to the Participant and make sure the CPIF attestation boxes 1 and 2 are checked. Include a copy of the [ClinCard FAQ](#)
- 6) **Note:** 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.  
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 the applicable milestone from the dropdown box for which the Participant 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 by designated Approver within your department, the amount will be removed from the “Pending Payment” area and reflected in the “Available Balance” area (Participants expect timely approval within 24 hours of visit).
- 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.

**Note:** If the Participant will not be compensated for some of the milestones, you should remove those from their payment schedule:

- a) Go to the Subject Information Screen, click on “Make Site Visit Payment”
- b) Choose the applicable milestone From the ‘Milestone’ drop down
- c) Click either the ‘Missed’ or ‘N/A’ button
- d) This will mark the payment as ‘skipped’ and remove it from the drop down. (this transaction is also viewable in the ‘Audit History’ tab in the Participants’ profile)

### ► **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](http://www.clincard.com) Admin Portal, please contact your Senior Clinical Trial Financial Analyst in the [BMC Clinical Trial Office \(CTO\)](#) for help. You may also contact BMC Research Business Information Systems at [RBI@bmc.org](mailto:RBI@bmc.org) for user account setup related issues.

## ► Frequently Asked Questions

### **Q: How is the ClinCard used by participants?**

*A participant can use their ClinCard for:*

1. *In-Store Purchases, selecting either “Credit” or “Debit” (“Debit” option requires PIN)*
  - *Using the “Debit” option will allow participants to select “cash back” option*
2. *Online Purchases*
3. *Cash Withdrawals at ATMs (requires PIN)*
4. *Cash Advances at a Banks*
  - *Participant 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.*
  - *Participant 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 participant 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 participant 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 participant 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 participant should either press “cancel” to be able to sign or tell the cashier they want to sign for their transaction.*

### **Q: How does a participant activate their ClinCard?**

*The ClinCard is active once the first payment is loaded. The participant 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 contact your Senior Clinical Trial Financial Analyst in the [BMC Clinical Trial Office \(CTO\)](#)*

**Q: How does a participant obtain their PIN?**

*The participant 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 participant loses their ClinCard?**

*The participant 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 participant 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 participant?**

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

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

*\* required if cumulative payments to the participant are expected to be  $\geq$  \$400 in Calendar Year*

*However, if a participant 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 participant 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 participant information is stored in a secure fashion and data is never shared with parties outside of Greenphire (ClinCard). Information collected is used by customer service in order to securely verify a participant’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](mailto: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?**

*Please contact your Senior Clinical Trial Financial Analyst in the [BMC Clinical Trial Office \(CTO\)](#)*

**Q: Is there a way to view ClinCard study transactions for my Participant?**

*Yes. Any of the Participant activity, **related to your ClinCard assigned studies only**, which includes Participant creation, payment loads and card assignments is viewable within the Participants' profile under the 'Audit History' tab.*