

## ClinCard Reference Guide: Site Coordinator

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

- 1) Login to [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 call our site support team at 215-609-4378.**

### ► How to Register a Subject

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

### ► 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

### ► 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 Enter Bank Account Information

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 “Add Bank Account” and a pop-up screen will appear
- 2) In the blank fields enter the required bank account information.
- 3) Click on the “Submit” button
- 4) Once the card has successfully been assigned, you will receive a confirmation message at the top of the “Subject Information” screen

## ► How to Request Assistance

If you have questions or comments about using the [www.clincard.com](http://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](http://www.clincard.com) website
- 2) Directly emailing us at [support@greenphire.com](mailto: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

## ► Frequently Asked Questions

### **Q: How is the mileage total calculated for Drive Reimbursement?**

*A: Our system is configured with Google Maps, who sends us a total based on its own calculations. We cannot override this calculation. Should our total not match what the subject drove, an “Add Other” payment may be entered for the difference, or a Manual Payment, if the “Add Other” option is not available.*

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

*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 a 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 contact site support at [support@greenphire.com](mailto:support@greenphire.com) or 215-609-4378 and indicate the number of additional cards that you require. Your replenishment cards should arrive in about 3 business days.*

#### **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)*

*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](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?**

*If you have unused/unissued ClinCards, contact site support at [support@greenphire.com](mailto:support@greenphire.com) or 215-609-4378, and Greenphire will provide information accordingly.*