ClinCard Checklist for Study Teams			
Payment Executer Workflow			
1	☐	Review and approve the build of the study's payment schedule in WISER [via Final PI/Designee Signoff], or confirm participant payment schedule if study is not in WISER.	
2	☐	Come to Office of Clinical Research (1st Floor Meads Hall) to pick up ClinCards (requires in-person signature)	
3	☐	Open study to accrual in WISER; recruit participants for the study	
Have you given the participant a WF ClinCard from a previous study?			
4a		If YES, the participant already has a ClinCard, then proceed to steps 5-5c and then step 7:	
4b		If NO, the participant does NOT already have a ClinCard, then proceed to steps 6-6g and then step 7:	
5	☐	Log into ClinCard using MedCenter credentials	See page 4 of the ClinCard Quick Reference Guide
5a	☐	Find the participant's record in ClinCard and confirm the participant's SSN (if required)	
5b	☐	Link the participant to the study in the ClinCard system, which should activate their existing ClinCard for your new study	See page 7 of the ClinCard Quick Reference Guide
5c	☐	Generate the visit payment to the participant via the ClinCard System. If this is a reimbursement, then go to step 7.	See pages 8-9 of the ClinCard Quick Reference Guide
6	☐	Log into ClinCard using MedCenter credentials	See page 2 of the ClinCard Quick Reference Guide
6a	☐	Generate the participant's record in the ClinCard system	
6b	☐	Obtain SSN from the participant (if required) and register them in the ClinCard system.	
6c	☐	Obtain a completed W-9 from the participant. W-9s should be provided directly to Accounts Payable.	See Participant Compensation and Reimbursement for Human Subjects Research SOP
6d	☐	Log the Token Number from the card given to the participant in ClinCard (DO NOT OPEN THE ENVELOPE)	See pages 5-6 of the ClinCard Quick Reference Guide
6e	☐	Link the participant to the study in the ClinCard system	See page 7 of the ClinCard Quick Reference Guide
6f	☐	Hand the card to the participant and answer any questions they may have (Please see FAQ sheet)	
6g	☐	Generate the visit payment to the participant via the ClinCard System. If this is a reimbursement, then go to step 7.	See pages 8-9 of the ClinCard Quick Reference Guide
7	☐	IF THE PAYMENT IS A REIMBURSEMENT, then follow the instructions on pages 11-13 of the ClinCard Quick Reference Guide and upload the receipts/documentation in ClinCard.	See pages 11-13 of the ClinCard Quick Reference Guide
Payment Approver Workflow			
1	☐	You will receive a system-generated notification via outlook that a payment is awaiting your approval in ClinCard.	
2	☐	Log into ClinCard using MedCenter credentials	See page 1 of the ClinCard Quick Reference Guide - Approver Role
3	☐	Review pending payment and confirm if it should be released.	See page 2 of the ClinCard Quick Reference Guide - Approver Role
4	☐	Approve/deny payments. If payment will be denied, then provide justification in ClinCard. See page 2 of the ClinCard Quick Reference Guide - Approver Role.	
Study Close-Out Workflow			
1	☐	Log into ClinCard using MedCenter credentials	See page 1 of the ClinCard Quick Reference Guide - Approver Role
2	☐	Compare occurred visits in WISER to completed payments in ClinCard to ensure all participants were paid appropriately.	
3	☐	Verify that a W-9 was provided to Accounts Payable for every participant.	
4	☐	After the study is closed in eIRB, then you will gather all unused, un-opened ClinCards.	
5	☐	Go to the Office of Clinical Research (1st floor Meads Hall) to return the unused, un-opened ClinCards (requires in-person signature).	

*For additional information on ClinCard and ClinCard Reference Guides, please visit the CTSI's website: https://ctsi.wakehealth.edu/ClinCard