

# ClinCard: Registering/Managing Subjects and Making Payments

## What has happened up to this point?

- The Study Coordinator has reviewed the WISER calendar and budget and signed off in WISER. The approved calendar and budget from WISER have been used by the OCR to create the payment schedule in ClinCard. The PI OR the PI Designee has approved the payment build via the Final PI/Designee Signoff in WISER.
- The OCR adds the Chartfield number into ClinCard, and then signs out the needed number of ClinCards to the Study Coordinator based on the anticipated number of Subjects in the "RC Total Accrual Goal (Upper)" data field in WISER. The OCR retains a log of the distributed cards.
- The Study Coordinator opens the study to accrual in WISER and begins recruiting. Once a Subject is accrued, they can be registered in ClinCard.

## Register a New Subject

1. Login to ClinCard using the OCR-provided URL.

greenphire® TRAINING

Username\*

jlineber

Password\*

LOGIN  Remember Username

[Forgot your username/password?](#)

[Cardholder? Click Here](#)

UNAUTHORIZED ACCESS WARNING:

Unauthorized access to this system, applications, and data are prohibited. All access and attempts to access this system are monitored and logged.

Information collected may be provided to law enforcement for prosecution of anyone violating this usage policy or in compliance with the law.

By using this system you are consenting to these conditions.

ClinCard | ConneXTS™  
Powered by Greenphire

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2. Click the **Register Subject** tab and select your Study from the drop-down menu.



## Subject Registration

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

-- Select Study --

3. Enter the information into the form. Fields with an asterisk are required.



## Subject Registration

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

B-NET (IRB00046460)

Study Status\*

Enrolled

Subject ID\*

Site\*

Wake Forest Baptist Health

### Name

First Name\*

Middle

Last Name\*

Initials\*

Social Security Number\*

### Address

Country\*

United States

Search for an address\*

Begin typing to find an address

### Personal

4. Be sure to ask the Subject whether they want to receive notifications by text, email, or both, and select the "Enable Email Alerts" and "Enable Text Messaging" checkboxes as applicable.
5. Click **Register** at the bottom of the page.

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 ClinCard interface for a user named Jim Lineber. The top navigation bar includes 'REGISTER SUBJECT', 'LOOK UP SUBJECT', 'PAYMENT APPROVALS', 'ADMIN', 'REPORTS', and 'SUPPORT'. The 'Look Up Subject' page displays the profile for 'JAMES R FLAMBE'. It features two tabs: 'SUBJECT INFORMATION' and 'AUDIT HISTORY'. The 'SUBJECT INFORMATION' tab is active, showing a dropdown for 'Study Name' (Short Title (IRB#, Industry v. non-industry)), 'Subject ID' (O12554), 'Participant Code' (..), and 'No card assigned.'. It also lists contact information: 'Address' (10818 Henderson Road, Fairfax Station, VA 22039), 'Timezone' (US/Eastern), 'Home Phone' (3364736777), 'Cell Phone' (3364736777), 'Allow Text Messages' (Yes), and 'Allow Email'. The 'AUDIT HISTORY' tab shows a list of recent activities, including 'Changed James R Flambe subject information' and 'Cardholder James Flambe has enrolled in study Short Title (IRB#, Industry v. non-industry) as Subject ID 012554 with status Enrolled'. On the right side, there are several action buttons: 'ASSIGN CLINCARD', 'REQUEST PAYMENT', 'REQUEST REIMBURSEMENT', 'EDIT SUBJECT', and 'SCHEDULE APPOINTMENT'.

## Look Up a Previously Registered Subject

When you log in to ClinCard, the first page that displays is the Look Up Subject site.

The screenshot shows the ClinCard interface for a user named Jim Lineber. The top navigation bar includes 'REGISTER SUBJECT', 'LOOK UP SUBJECT', 'PAYMENT APPROVALS', 'ADMIN', 'REPORTS', and 'SUPPORT'. The 'Look Up Subject' page displays a search form for finding a previously registered subject. The search criteria include 'Study' (a dropdown menu with '-- All Studies --'), 'Name', 'Subject ID', 'Initials', 'Subject Email', and 'Last 4 Digits of ClinCard'. A 'SEARCH' button is located at the bottom left. On the right side, there is a 'RECENT ACTIVITY' section with a list of actions: 'Assigned card X-5072 to Brett L Favre', 'Assigned card X-5056 to James R Flambe', 'Cardholder Brett Favre has enrolled in study B-NET...', 'Created new subject Brett L Favre', 'Changed James R Flambe subject information', and 'Cardholder James Flambe has enrolled in study Short Title...'. A 'VIEW ALL >' link is at the bottom of the activity list.

If you're in another site in ClinCard, the **Look Up Subject** tab will always be displayed for selection at the top of the page.

1. Enter data in one or more of the search fields and click **Search** to view the results.
2. Click the **Last Name** hyperlink of the Subject.

**ClinCard** WELCOME, JIM LINEBER  
User Settings | Logout

REGISTER SUBJECT **LOOK UP SUBJECT** PAYMENT APPROVALS ADMIN REPORTS SUPPORT

## Look Up Subject

Study  
-- All Studies --

Only Studies with registered cardholders are displayed.

Name: Favre Subject ID: Initials: [ ]

Subject Email: Last 4 Digits of ClinCard: [ ]

**SEARCH**

**Search Results**  
1 records found

SEARCH: [ ]

LAST NAME	FIRST NAME	LAST FOUR	LOCATION	STUDY	ID
<a href="#">Favre</a>	Brett	5072	Wake Forest Baptist Health	B-NET (IRB00046460)	333122

**RECENT ACTIVITY**

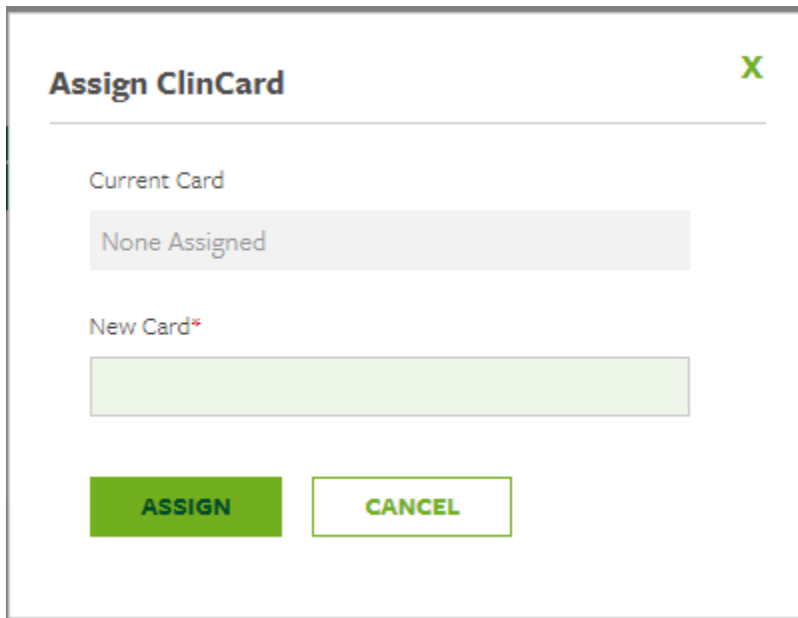
- Assigned card X-5072 to **Brett L Favre**
- Assigned card X-5056 to **James R Flambe**
- Cardholder Brett Favre has enrolled in study B-NET...
- Created new subject **Brett L Favre**
- Changed **James R Flambe** subject information
- Cardholder James Flambe has enrolled in study Short Title...

[VIEW ALL >](#)

## Assign a ClinCard

Once you have selected an existing Subject or registered a new Subject, you will be brought to the "Subject Information" page. On the right-hand side you will see the options you can select for this Subject.

1. Click **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 token number visible through the window of the ClinCard card package.

**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**.
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 James Flambe. The new card will be active within 10 minutes.

5. Now an option to “Replace ClinCard” appears in the Subject Menu.

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.

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**.

**ClinCard** WELCOME, JIM LINEBERGER  
User Settings | Logout

REGISTER SUBJECT LOOK UP SUBJECT PAYMENT APPROVALS ADMIN REPORTS SUPPORT

### Edit Subject Information

**Study Membership**

Study\* Subject ID\* Subject Status\*

B-NET (IRB00046460) 012554 Enrolled

+ ADD STUDY

**Name**

First Name\* Middle Last Name\* Initials\* SSN\*

James R Flambe JRF \*\*\*\*\*

last four: 9999

2. Click the **Add Study** hyperlink under the Study Membership section.

3. Select the Study from the drop-down menu, enter the new Subject ID, and select or accept the Subject status.

### Study Membership

Study*	Subject ID*	Subject Status*
B-NET (IRB00046460)	012554	Enrolled
Study*	Subject ID*	Subject Status*
-- Select Study --		Enrolled
MIND Nicotine Study (IRB00042140)		

4. Confirm Name, Address and all personal information.

5. Click **Save**.

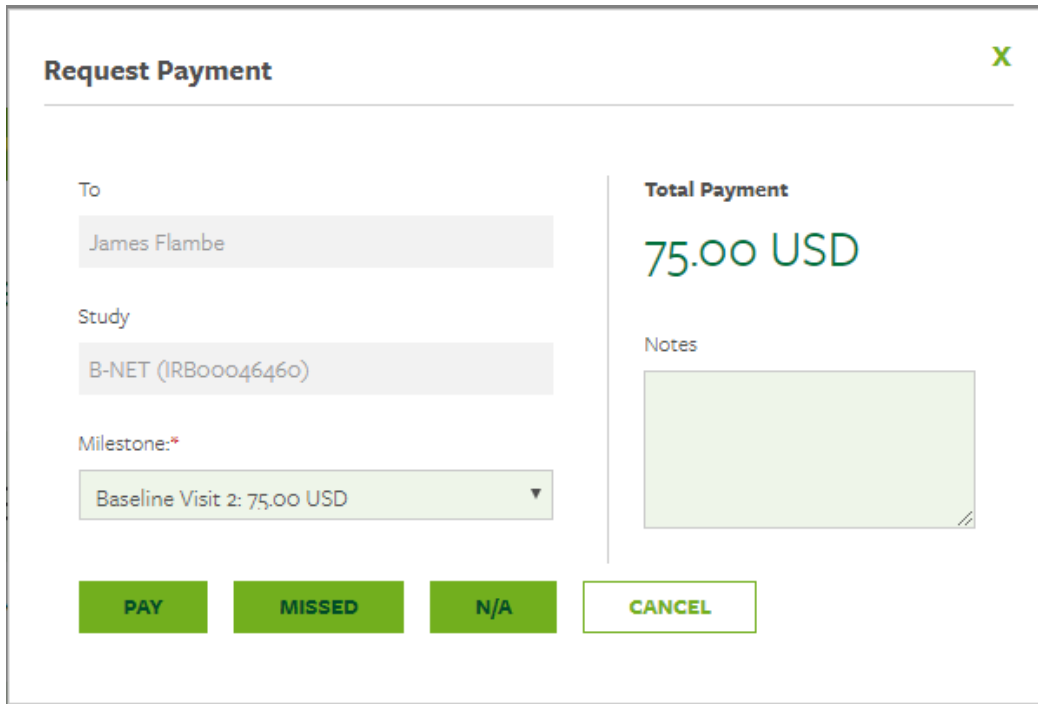
NOTE: When making payments for a Subject registered to multiple studies, you may be prompted to select the appropriate study in order to enter the payment.

## [Request a Payment](#)

1. Click **Request Payment** on the Subject Information page and a pop-up screen will appear.

2. Select the Milestone the subject is being paid (see the following section if “Miscellaneous Payment” will be selected).

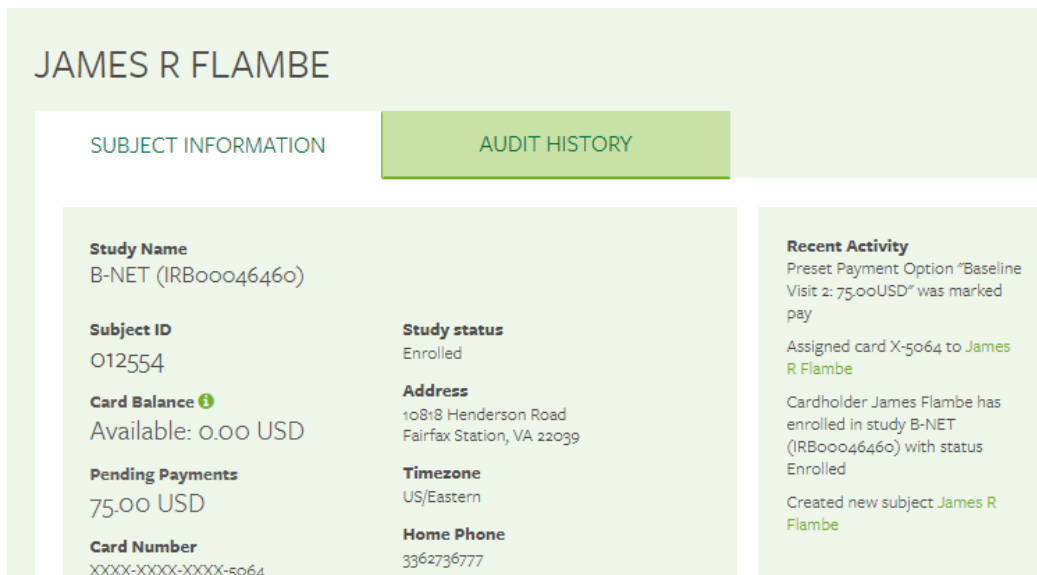
2. Add a Note (not required).



The image shows a 'Request Payment' form. On the left, there are input fields for 'To' (James Flambe), 'Study' (B-NET (IRB00046460)), and 'Milestone:\*' (Baseline Visit 2: 75.00 USD). On the right, the 'Total Payment' is displayed as 75.00 USD, and there is a 'Notes' text area. At the bottom, there are four buttons: 'PAY', 'MISSED', 'N/A', and 'CANCEL'.

3. Click Pay.

When a payment has successfully been requested, the "Pending Payments" area of the "Subject Information" page will reflect the payment (although you may need to refresh the Subject Information page to see this). It will also be reflected in your "Recent Activity" in the middle of the screen.



The image shows the 'Subject Information' page for James R Flambe. The page has two tabs: 'SUBJECT INFORMATION' and 'AUDIT HISTORY'. The 'SUBJECT INFORMATION' tab is active. It displays the following information:

<b>Study Name</b> B-NET (IRB00046460)	<b>Subject ID</b> 012554	<b>Study status</b> Enrolled	<b>Recent Activity</b> Preset Payment Option "Baseline Visit 2: 75.00USD" was marked pay Assigned card X-5064 to James R Flambe Cardholder James Flambe has enrolled in study B-NET (IRB00046460) with status Enrolled Created new subject James R Flambe
<b>Card Balance</b> ⓘ Available: 0.00 USD	<b>Address</b> 10818 Henderson Road Fairfax Station, VA 22039	<b>Timezone</b> US/Eastern	
<b>Pending Payments</b> 75.00 USD	<b>Home Phone</b> 3362736777		
<b>Card Number</b> XXXX-XXXX-XXXX-5064			



When a payment has been *approved* and processed, the amount will be removed from the "Pending Payments" area and will be reflected in the "Card Balance" area.

## JAMES R FLAMBE

SUBJECT INFORMATION    AUDIT HISTORY

<b>Study Name</b> B-NET (IRB00046460)	<b>Study status</b> Enrolled	<b>Recent Activity</b> Preset Payment Option "Follow-Up Visit 4: 75.00USD" was marked pay Preset Payment Option "Baseline Visit 2: 75.00USD" was marked pay Assigned card X-5064 to <b>James R Flambe</b> Cardholder James Flambe has enrolled in study B-NET (IRB00046460) with status Enrolled Created new subject <b>James R Flambe</b> <a href="#">VIEW ALL</a>
<b>Subject ID</b> 012554	<b>Address</b> 10818 Henderson Road Fairfax Station, VA 22039	
<b>Card Balance</b> Available: 75.00 USD	<b>Timezone</b> US/Eastern	
<b>Pending Payments</b> 0.00 USD	<b>Home Phone</b> 3362736777	
<b>Card Number</b> XXXX-XXXX-XXXX-5064	<b>Cell Phone</b> 3362736777	
<b>Expiration Date</b> 30-SEP-2021		

At this juncture, if the Subject has opted to receive *email and/or text messages*, they will receive a payment confirmation communication.

## [Make a Miscellaneous Payment](#)

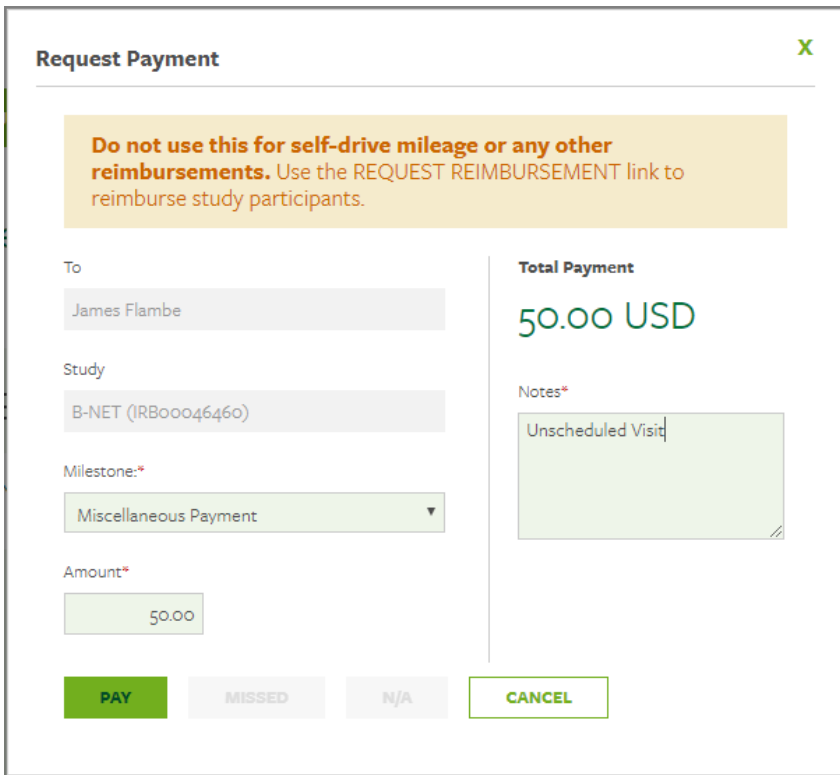
If you choose **Miscellaneous Payment** when you Request a Payment, the following form will display:

### Request Payment X

**Do not use this for self-drive mileage or any other reimbursements.** Use the REQUEST REIMBURSEMENT link to reimburse study participants.

<b>To</b> James Flambe	<b>Total Payment</b> 0.00 USD
<b>Study</b> B-NET (IRB00046460)	<b>Notes*</b> <div></div>
<b>Milestone:*</b> Miscellaneous Payment	
<b>Amount*</b> <div></div>	

Enter the payment amount, add a comment, and click **Pay**.



**Request Payment** X

**Do not use this for self-drive mileage or any other reimbursements.** Use the REQUEST REIMBURSEMENT link to reimburse study participants.

To: James Flambe

Study: B-NET (IRB00046460)

Milestone\*: Miscellaneous Payment

Amount\*: 50.00

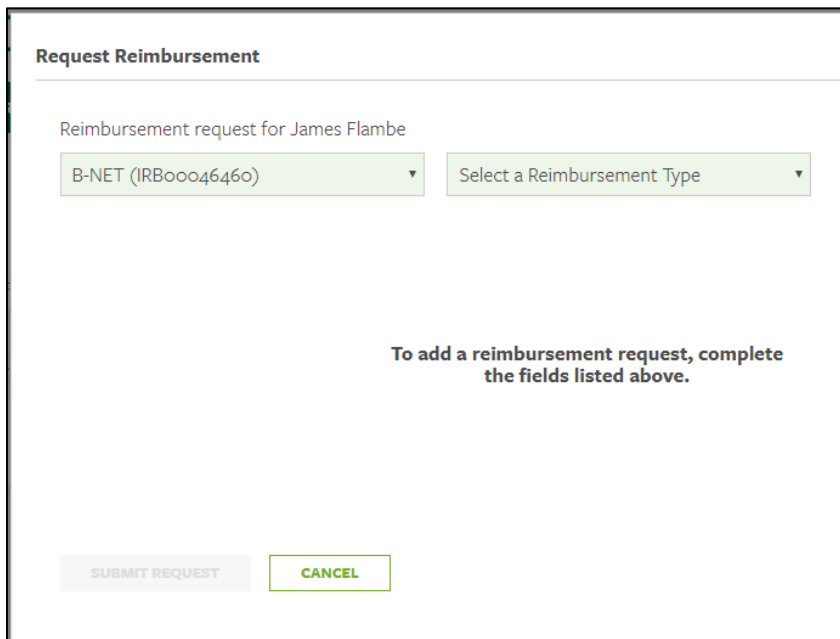
**Total Payment**  
**50.00 USD**

Notes\*:  
Unscheduled Visit

**PAY** **MISSED** **N/A** **CANCEL**

## [Request a Reimbursement and Upload a Receipt](#)

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



**Request Reimbursement**

Reimbursement request for James Flambe

B-NET (IRB00046460) Select a Reimbursement Type

**To add a reimbursement request, complete the fields listed above.**

**SUBMIT REQUEST** **CANCEL**

2. Select the milestone (if applicable) and reimbursement from the milestones drop-down menu.

**Request Reimbursement**

Reimbursement request for James Flambe

B-NET (IRB00046460) ▼

Select a Reimbursement Type ▼

Select a Reimbursement Type

Drive/Mileage

Other Reimbursement

**To add a reimbursement request, complete the fields listed above.**

SUBMIT REQUEST CANCEL

Reimbursement options will show applicable to your study ONLY.

- Reimbursements can be associated with specific milestones. The list of milestones will come from the preset study payments maintained by the OCR.
- 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.
- 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**.

**Request Reimbursement** X

---

Reimbursement request for James Flambe

B-NET (IRB00046460) Other Reimbursement

---

**Please note:** When uploading a receipt, be sure to remove any information that may identify study participants.

Amount\*  
 USD

Notes\*

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

ADD REQUEST CANCEL

- Check the referenced checkbox if you are unable to upload the receipt for any reason. Greenphire assumes you will keep the receipt on file for that reimbursement.
- 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 James Flambe

B-NET (IRB00046460) Other Reimbursement

---

**Please note:** When uploading a receipt, be sure to remove any information that may identify study participants.

Amount\*  
 USD

Notes\*

dusk\_WFBMC.png 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**.

The screenshot shows a web form titled "Request Reimbursement" with a close button (X) in the top right corner. The form content includes: "Reimbursement request for James Flambe", a dropdown menu for "B-NET (IRB00046460)", and another dropdown menu for "Select a Reimbursement Type". Below these is a summary row for "OTHER REIMBURSEMENT" with a value of "50.00 USD" and a trash icon. Underneath, there are sections for "Notes:" (containing "meal") and "Receipt:" (containing "dusk\_WFBMC.png"). At the bottom, there are two buttons: "SUBMIT REQUEST" (green) and "CANCEL" (white with green border). On the right side, there is a "TOTAL" label followed by "50.00 USD".

6. Once the reimbursement has been successfully submitted, 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.

The screenshot shows a web form titled "Schedule Appointment" with a close button (X) in the top right corner. The form content includes: "Schedule next appointment for James R Flambe", a "Study" dropdown menu with "B-NET (IRB00046460)" selected, and two required fields: "Appointment Date\*" (with an example "ex: 12-MAR-2016") and "Appointment Time\*" (with a time selection dropdown set to "AM"). Below these fields is a note: "All times are as of the site's time zone: US/Eastern". At the bottom, there are two buttons: "SCHEDULE" (green) and "CANCEL" (white with green border).

2. Use the **Appointment Date** and **Appointment Time** fields to enter the Subject's next appointment.
3. Click **Schedule**.

### Schedule Appointment X

---

Schedule next appointment for James R Flambe

Study

B-NET (IRB00046460)

Appointment Date\*      Appointment Time\*

30-Sep-2018

1

:

30

PM ▼

All times are as of the site's time zone: US/Eastern

**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: US/Eastern

DATE	DAY	TIME	STUDY	SCHEDULED BY	
30-SEP-2018	Sunday	01:30 PM	B-NET (IRB00046460)	Jim Lineberger	<a href="#" style="color: green; text-decoration: none;">CHANGE</a>   <a href="#" style="color: green; text-decoration: none;">CANCEL</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.

## Audit History


While viewing the Subject Information, you may select the adjacent **Audit History** tab to view an all-inclusive/detailed history of actions and activities.


### JAMES R FLAMBE

SUBJECT INFORMATION

AUDIT HISTORY

#### Payment History

 PRINTER-FRIENDLY

SUBMITTED	AMOUNT	STUDY	DESCRIPTION	STATUS 	APPROVED	ACTIONS
21-SEP-2018 09:03 AM EDT Jim Lineberger (jlineber)	50.00 USD	B-NET (IRB00046460)	Transaction #3164-9235251C0B Other Reimbursement Milestone: None Released Amount: 0.00 Notes: meal	Waiting for approval	N/A	
20-SEP-2018 03:26 PM EDT Jim Lineberger (jlineber)	75.00 USD	B-NET (IRB00046460)	Transaction #3164-3F00C7E8A6 Milestone: Follow-Up Visit 4 Released Amount: 0.00 Notes: N/A	Waiting for approval	N/A	
20-SEP-2018 02:32 PM EDT Jim Lineberger (jlineber)	75.00 USD	B-NET (IRB00046460)	Transaction #3164-28846BDB96 Milestone: Baseline Visit 2 Notes: N/A	Paid	20-SEP-2018 03:24 PM EDT Jim Lineberger (jlineber)	Void

#### Recent Activity

ACTION	MESSAGE	ACTIVITY BY	ACTIVITY DATE
Scheduled Appointment	Scheduled appointment for <b>James R Flambe</b> on September 30, 2018 at 01:30 PM EDT	jlineber	21-SEP-2018 09:40 AM EDT
Preset Payment Paid	Preset Payment Option "Follow-Up Visit 4: 75.00USD" was marked pay	jlineber	20-SEP-2018 03:26 PM EDT
Preset Payment Paid	Preset Payment Option "Baseline Visit 2: 75.00USD" was marked pay	jlineber	20-SEP-2018 02:32 PM EDT
Card Assigned	Assigned card X-5064 to <b>James R Flambe</b>	jlineber	20-SEP-2018 02:10 PM EDT
Enrolled in Study	Cardholder James Flambe has enrolled in study B-NET (IRB00046460) with status Enrolled	jlineber	20-SEP-2018 02:04 PM EDT
Subject Created	Created new subject <b>James R Flambe</b>	jlineber	20-SEP-2018 02:04 PM EDT

## Subject Status Update

To update the status of a Subject, you will use the **Look Up Subject** to locate and open the Subject Information page and then select **Edit Subject**. Use the Subject Status reference list to designate the new status, and then click **Save**.

**ClinCard** WELCOME, JIM LINEBERGER  
User Settings | Logout

REGISTER SUBJECT LOOK UP SUBJECT PAYMENT APPROVALS ADMIN REPORTS SUPPORT

### Edit Subject Information

**Study Membership**

Study\* Subject ID\* Subject Status\*

B-NET (IRB00046460) 012554 Enrolled

+ ADD STUDY

Screening  
Enrolled  
Dropped  
Completed

**Name**

First Name\* Middle Last Name\* Initials\* SSN\*

James R Flambe JRF \*\*\*\*\*

last four: 9999



## Payment Approvals

If you are the Payment Approver for one or more studies, you will select the **Payment Approvals** tab to see the pending payments. Please note that a **Site Coordinator** (who has the ability to enter payments) cannot be the **Approver** for the same clinical study!

WELCOME, JIM LINEBERGER  
User Settings | Logout

REGISTER SUBJECT LOOK UP SUBJECT **PAYMENT APPROVALS** ADMIN REPORTS SUPPORT

### Payment Approvals

APPROVE SELECTED DECLINE SELECTED CANCEL

Unchecked payments will continue to wait for approval.

**Selected Totals By Currency Type** (Displaying 1 - 4 of 4 pending payments available)

US DOLLAR  
0.00 USD

FILTER BY: DATE RANGE STUDY SUBJECT ID

	AMOUNT	TYPE	DATE	STUDY	SUBJECT ID	IN REVIEW ?	ADD NOTE
<input type="checkbox"/>	75.00 USD	Preset Payment	20-Sep-2018	B-NET (IRB00046460) 710-101720-00000-653032	012554	<input type="radio"/> No	I can add a note here...
		Milestone: Follow-Up Visit 4 Requester: Jim Lineberger					
<input type="checkbox"/>	50.00 USD	Other Reimbursement	21-Sep-2018	B-NET (IRB00046460) 710-101720-00000-653032	012554	<input type="radio"/> No	Type to add note...
		Notes: meal Requester: Jim Lineberger					
<input type="checkbox"/>	25.00 USD	Preset Payment	21-Sep-2018	MIND Nicotine Study (IRB000 42140) 710-101720-00000-Z10784	GG5541	<input type="radio"/> No	Type to add note...
		Milestone: Screening Requester: Jim Lineberger					
<input type="checkbox"/>	50.00 USD	Preset Payment	21-Sep-2018	MIND Nicotine Study (IRB000 42140) 710-101720-00000-Z10784	GG5541	<input type="radio"/> No	Type to add note...
		Milestone: Baseline Requester: Jim Lineberger					

Email alerts will be sent twice daily to inform you that there are payments pending your approval. These messages are sent at 6am and 4pm EST.

1. If you need to filter the list, you may utilize one or more of the FILTER BY selections of Date Range, Study, and/or Subject ID.
2. Once you select the checkbox(es) for one or more payments, the **Approve Selected**, **Decline Selected**, and **Cancel** buttons are activated for use.

Note: If you would like to approve all payments in the list, check the box to the left of "Amount" to select all, and then click the **Approve Selected** button. You may also **Decline** all via the same steps.

## Payment Approvals

APPROVE SELECTED

DECLINE SELECTED

CANCEL

Unchecked payments will continue to wait for approval.

### Selected Totals By Currency Type (Displaying 1 - 4 of 4 pending payments available)

US DOLLAR

75.00 USD

FILTER BY: [DATE RANGE](#)   [STUDY](#)   [SUBJECT ID](#)

	AMOUNT	TYPE	DATE	STUDY	SUBJECT ID	IN REVIEW	ADD NOTE
<input checked="" type="checkbox"/>	75.00 USD	Preset Payment	20-Sep-2018	B-NET (IRB00046460) 710-101720-00000-553032	012554	<input type="radio"/> No	Type to add note...
		Milestone:	Follow-Up Visit 4				
		Requester:	Jim Lineberger				

3. If you decline a payment, you may also want to enter a note under the "Add Note" column.

4. If there is a *receipt* added to a pending payment, it will be accessible within the payment detail.

<input type="checkbox"/>	155.00 USD	Other Reimbursement	21-Sep-2018	MIND Nicotine Study (IRB000 42140) 710-101720-00000-Z10784	GG5541	<input type="radio"/> No	Type to add note...
		Notes:	travel				
		Receipts:	<a href="#">Protocol Type Definitions.pdf</a>				
		Requester:	Jim Lineberger				