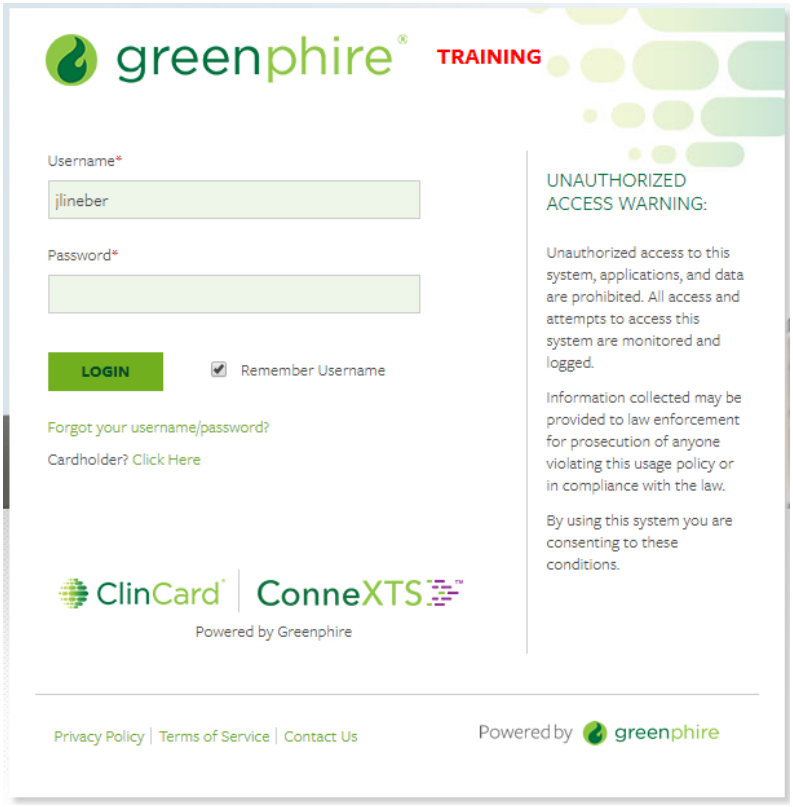
ClinCard: Registering/Managing Subjects and Making Payments

What has happened up to this point?

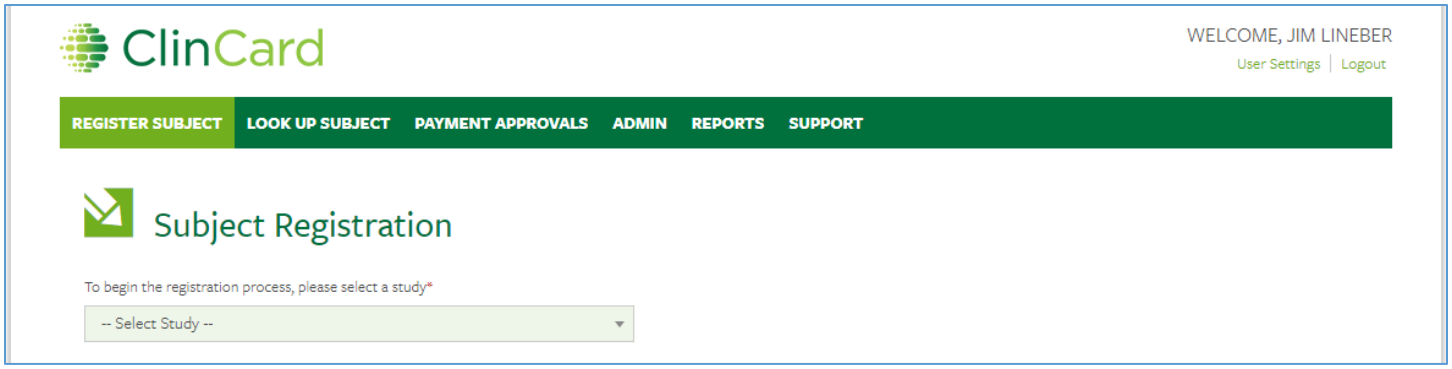
- The Study Coordinator has reviewed the WISER calendar and budget and signed off in WISER. The approved calendar and budget from WISER have been used by the OCR to create the payment schedule in ClinCard. The PI OR the PI Designee has approved the payment build via the Final PI/Designee Signoff in WISER.
- 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

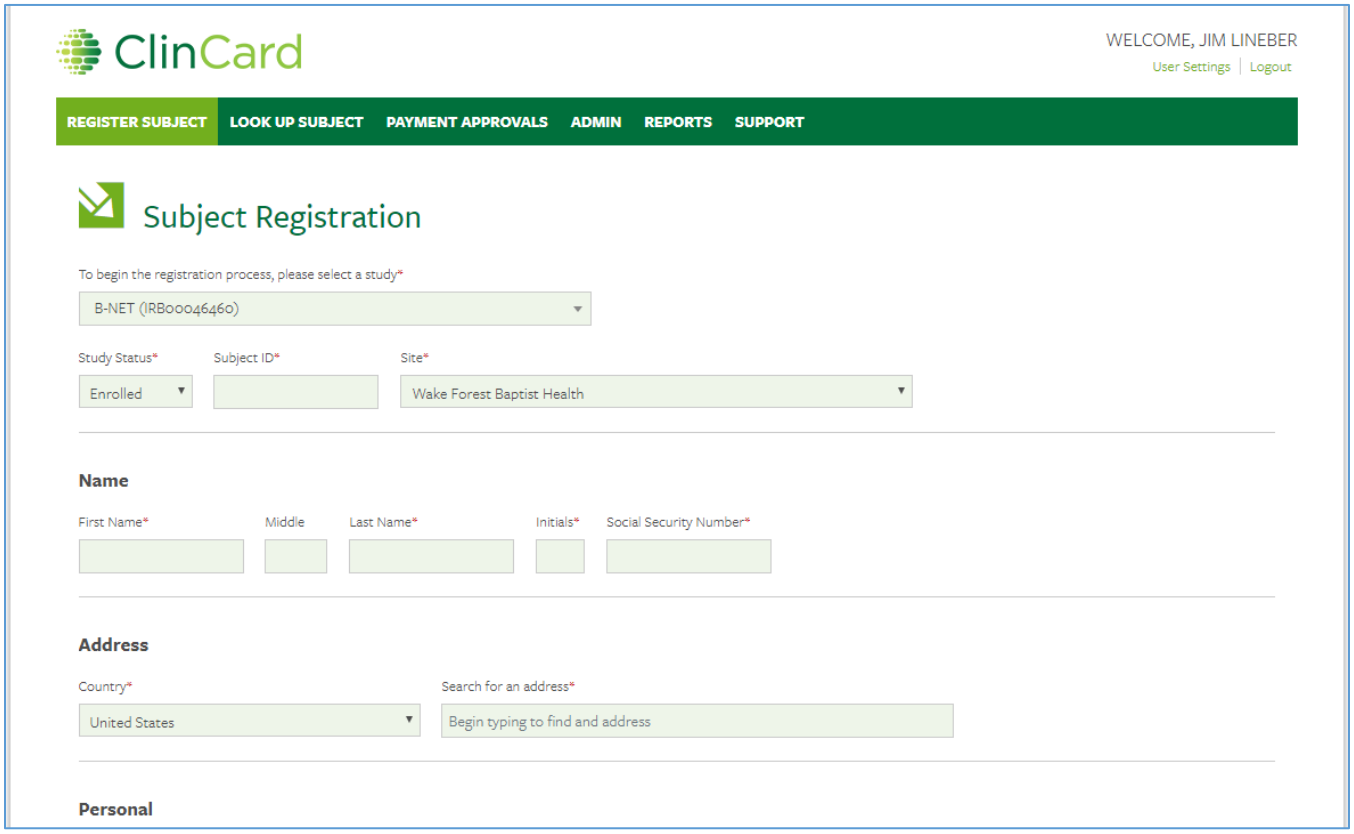
1. Login to ClinCard using the OCR-provided URL.



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



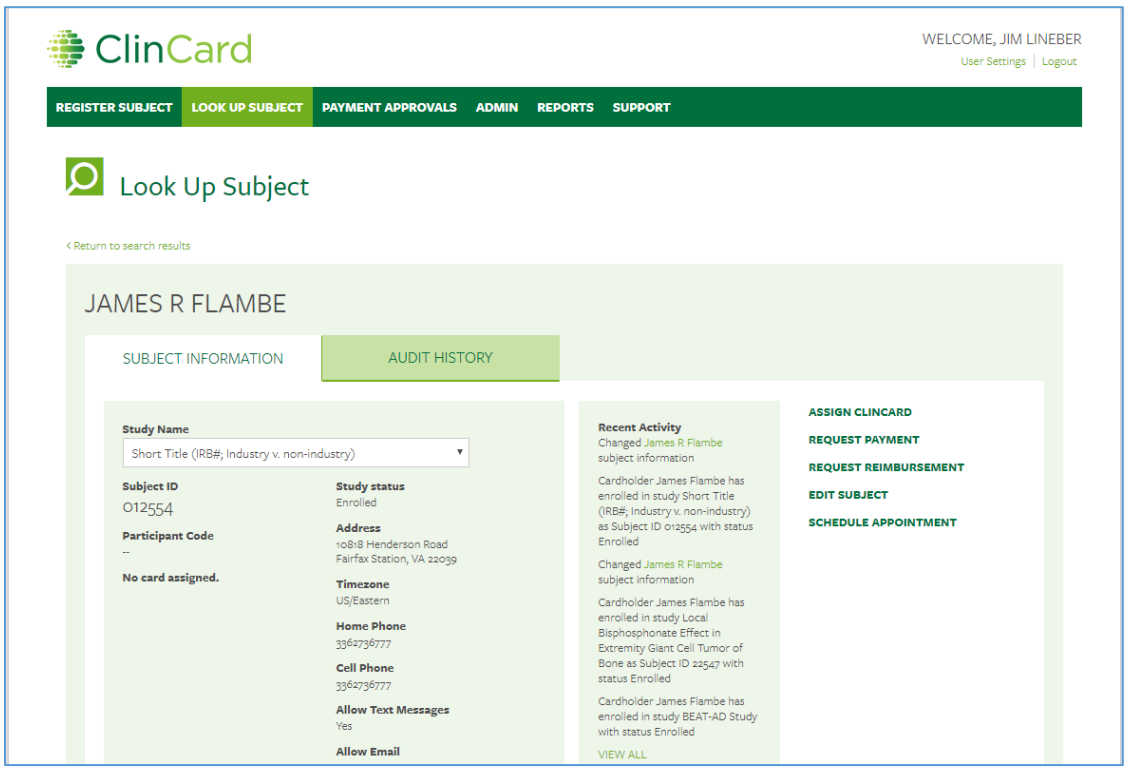
3. Enter the information into the form. Fields with an asterisk are required.



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.

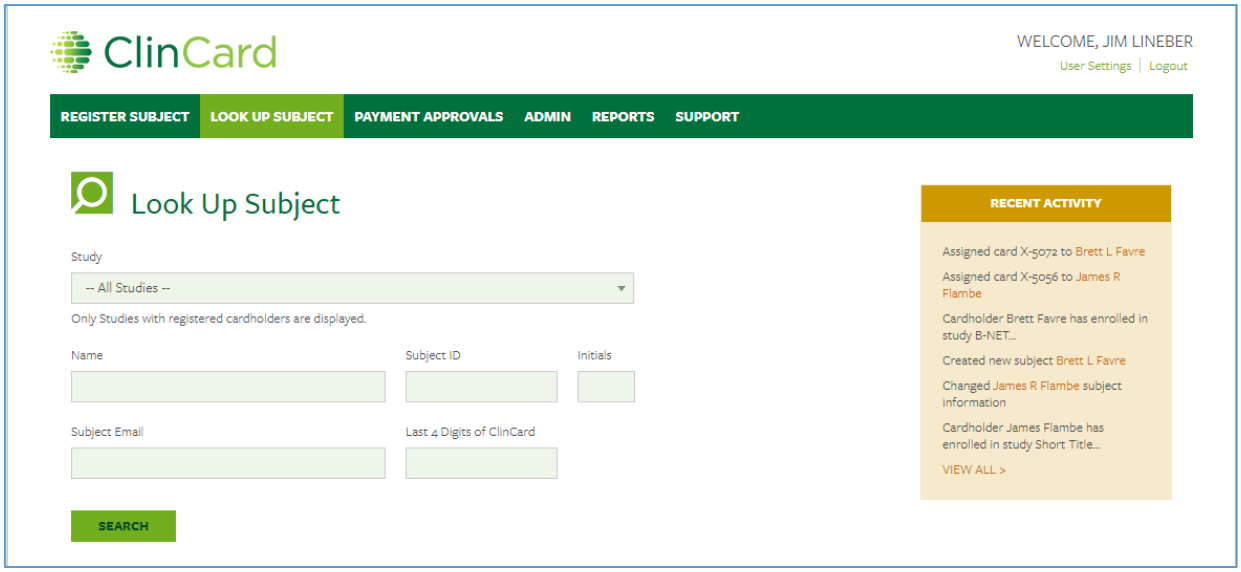
5. Click **Register** at the bottom of the page.

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.



Look Up a Previously Registered Subject

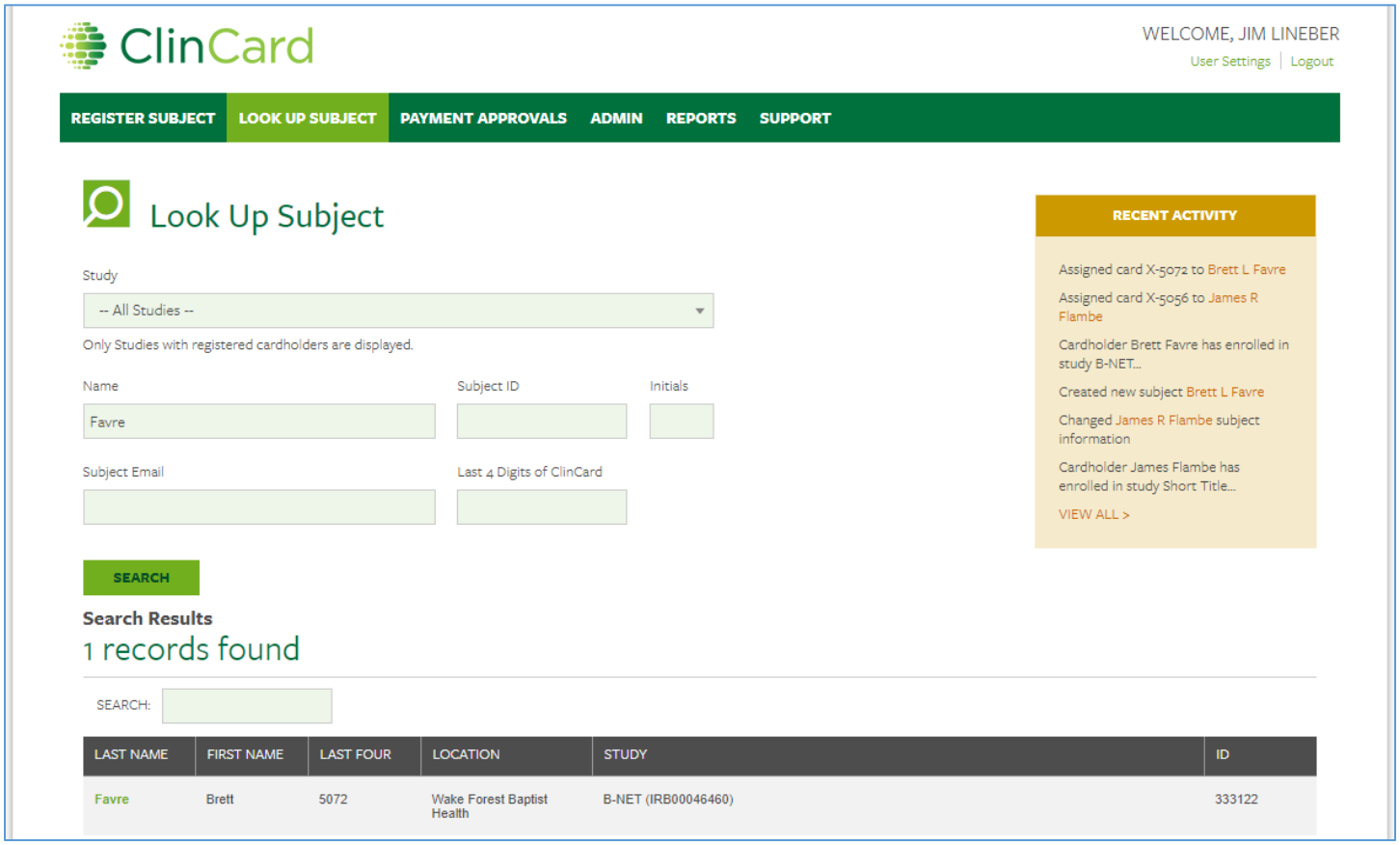
When you log in to ClinCard, the first page that displays is the **Look Up Subject** site.



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.

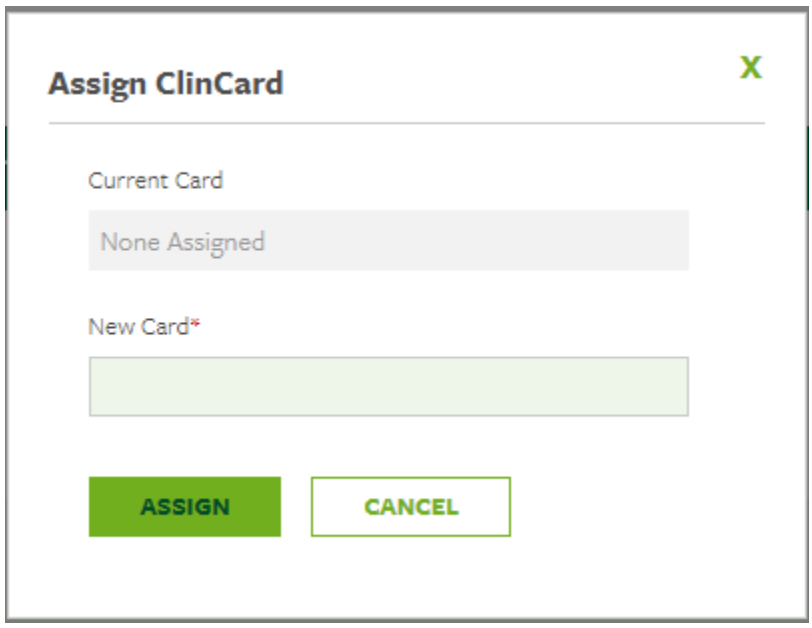
2. Click the **Last Name** hyperlink of the Subject.



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:



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.

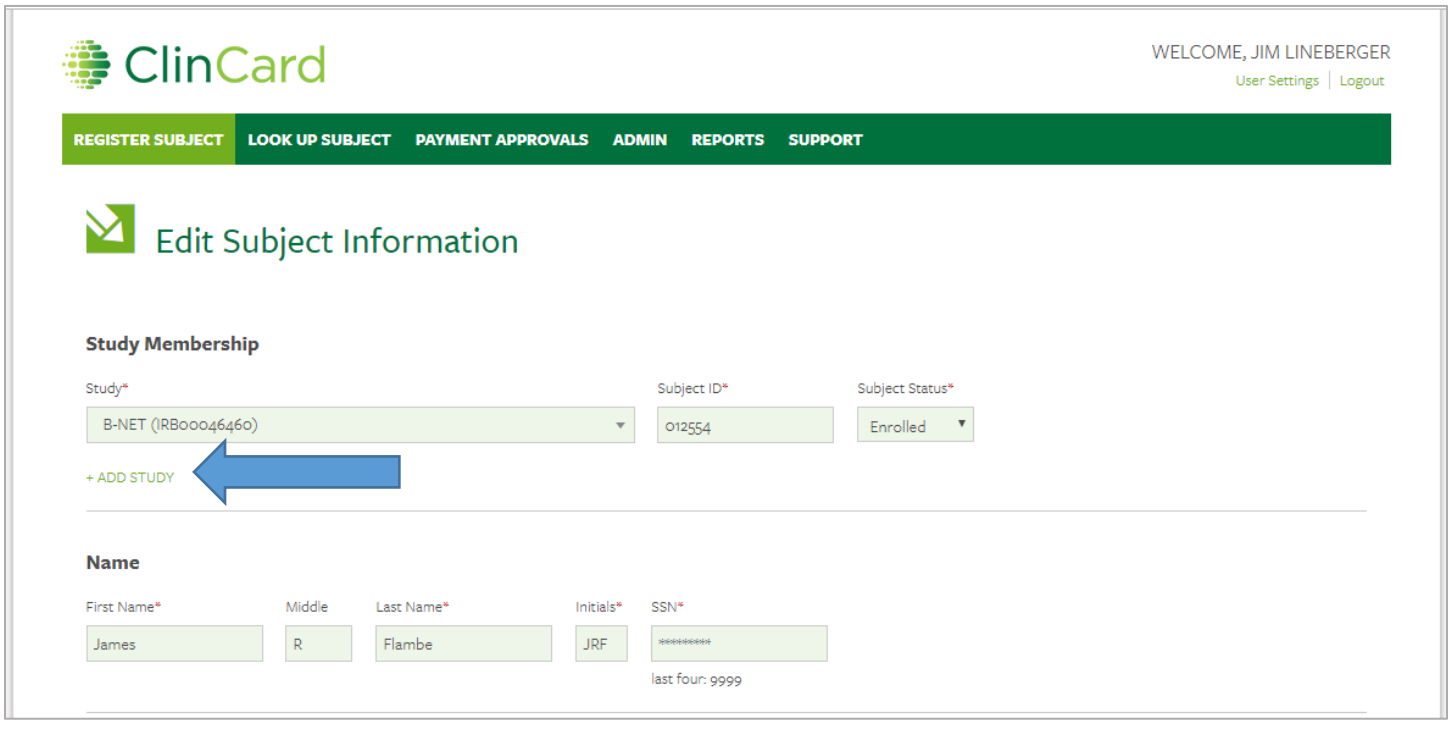
In the event that a Subject loses their card, you can replace that card for them by clicking **Replace ClinCard**, and following the steps above, using the token number from a new ClinCard card package.

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

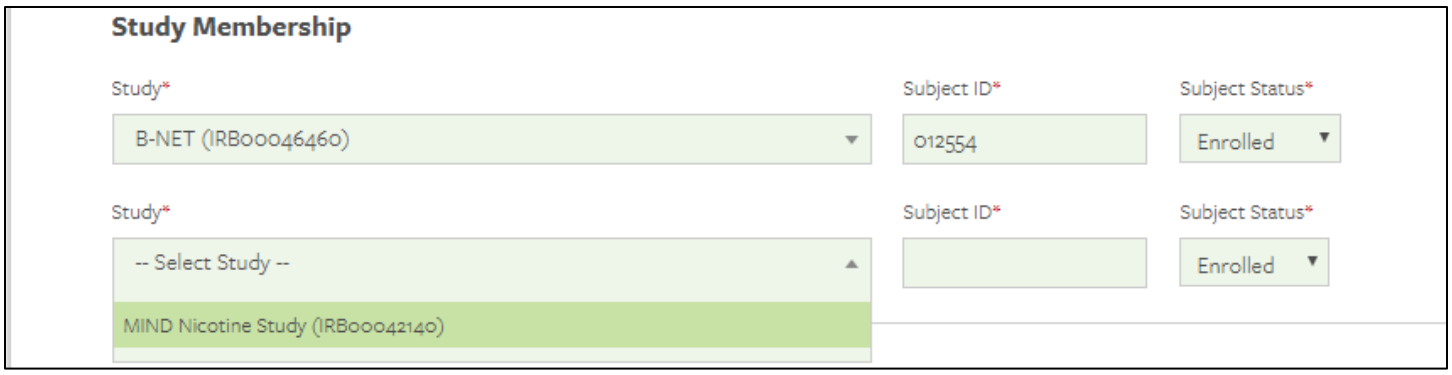
Once you have selected an existing subject in the system, you will be brought to the "Subject Information" screen. On the right-hand side of the screen, you will see options that represent all of the actions you can perform on the Subject.

1. Click **Edit Subject**.



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.



4. Confirm Name, Address and all personal information.

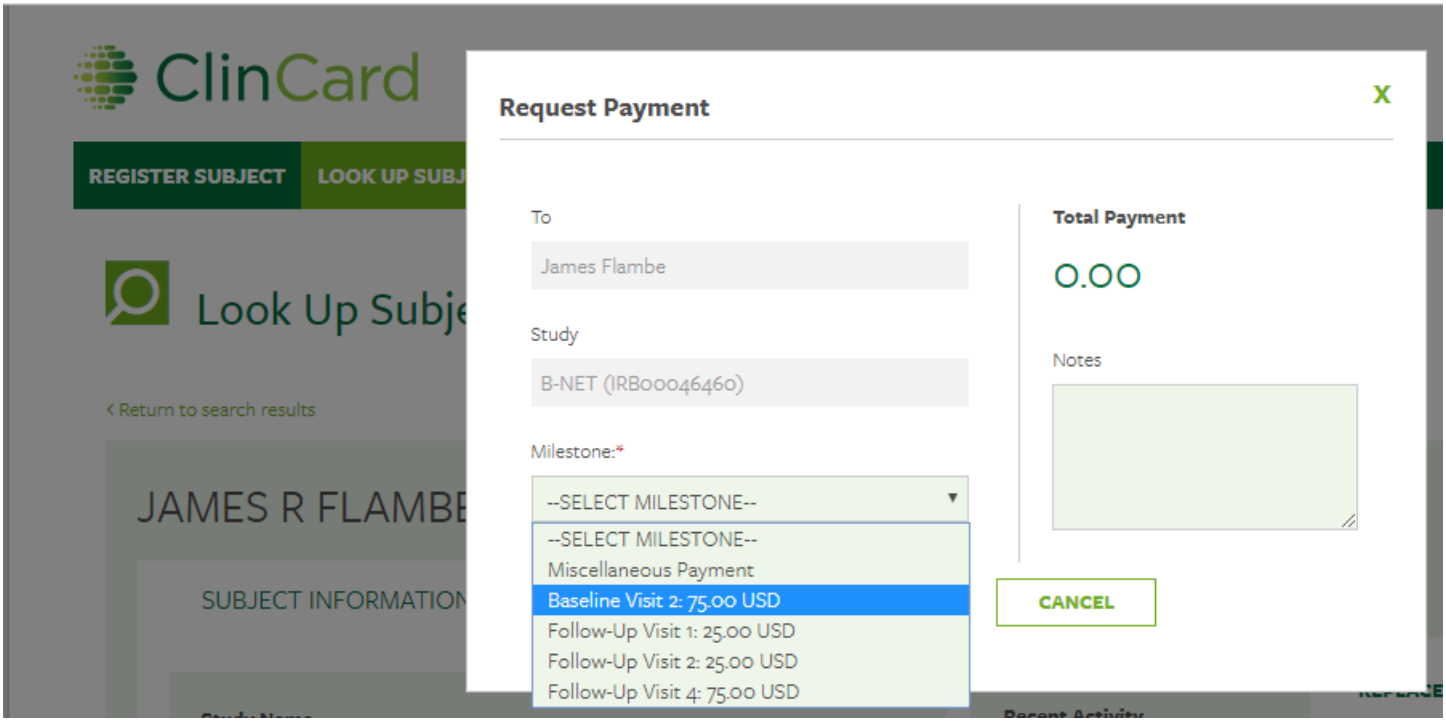
5. Click **Save**.

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.

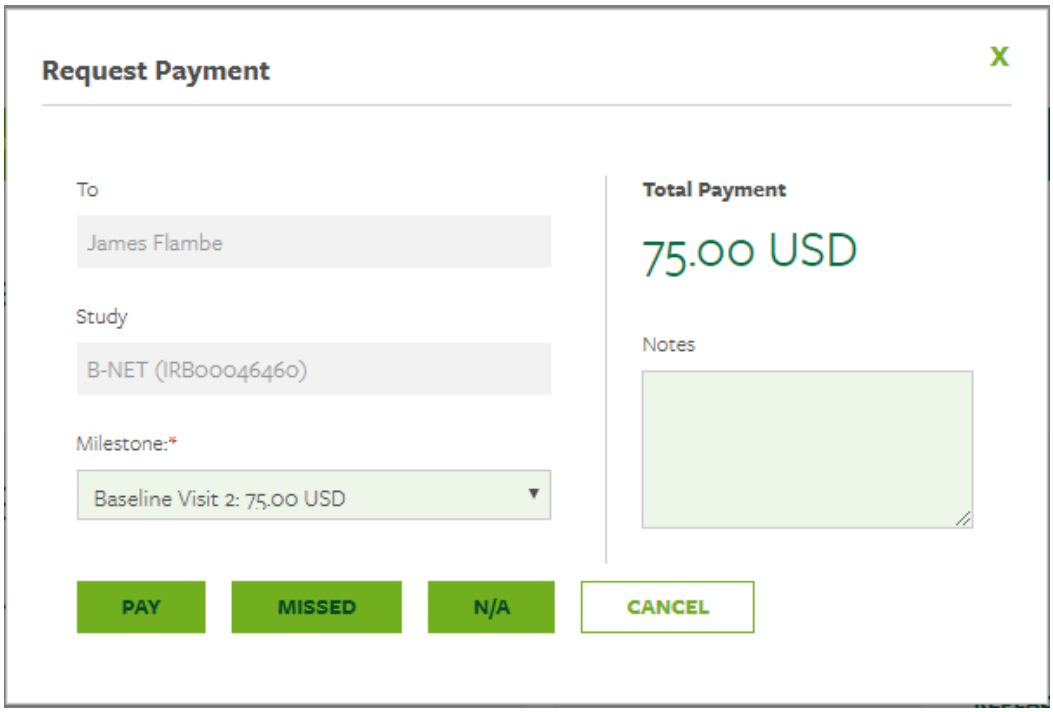
Request a Payment

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).

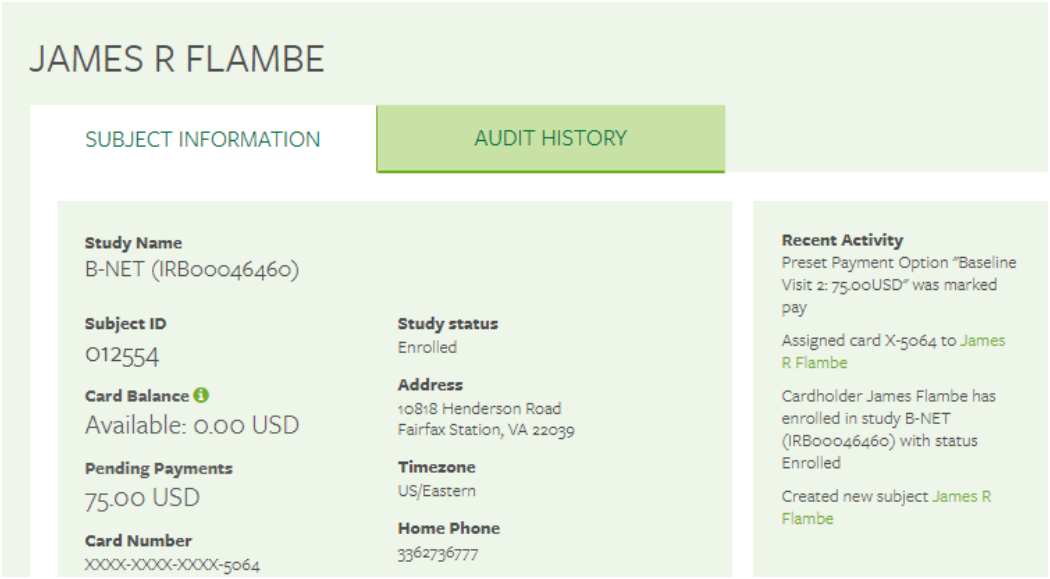


2. Add a Note (not required).

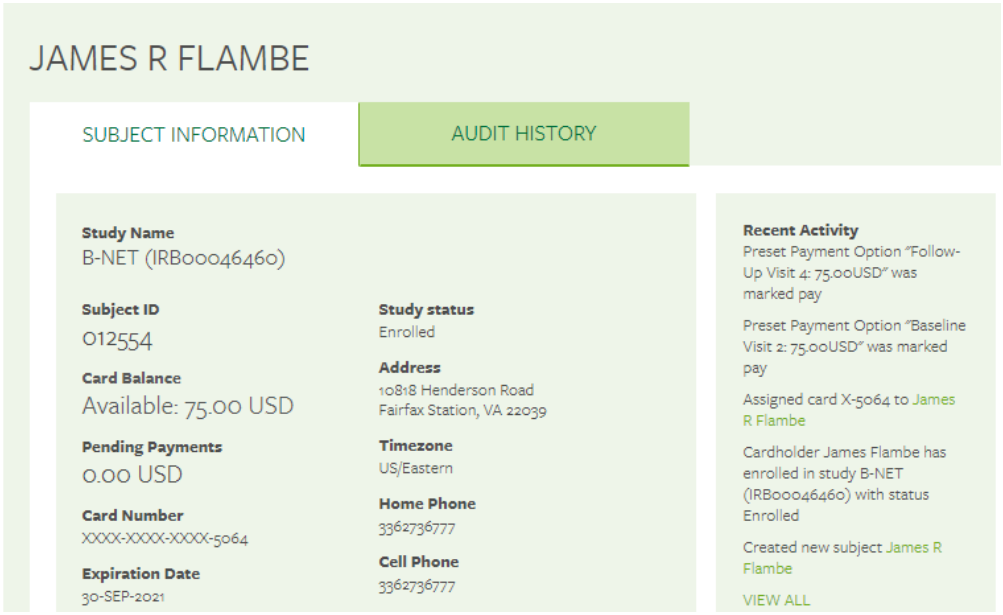


3. Click **Pay**.

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.



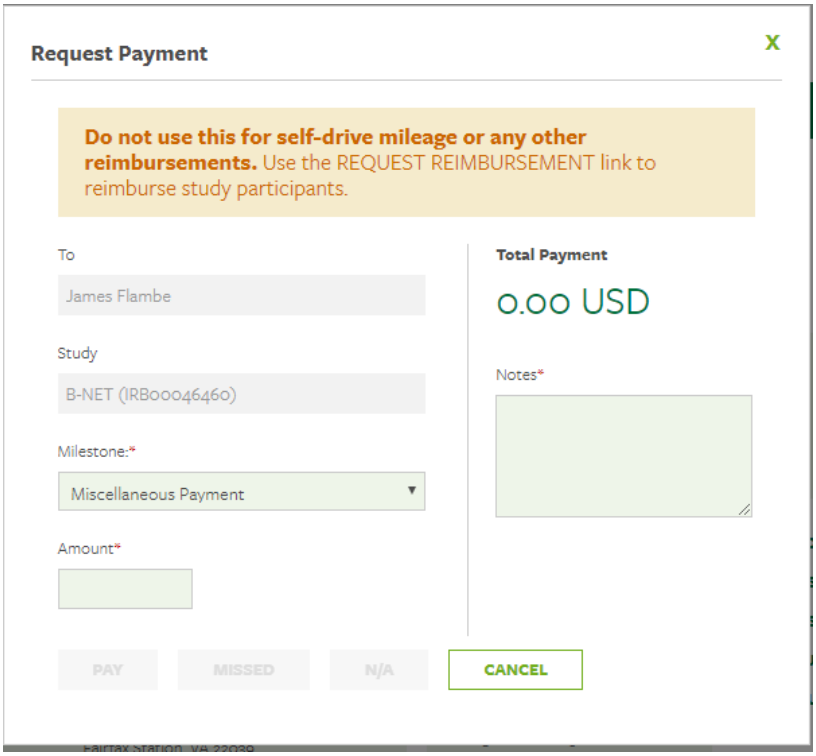
When a payment has been *approved* and processed, the amount will be removed from the "Pending Payments" area and will be reflected in the "Card Balance" area.



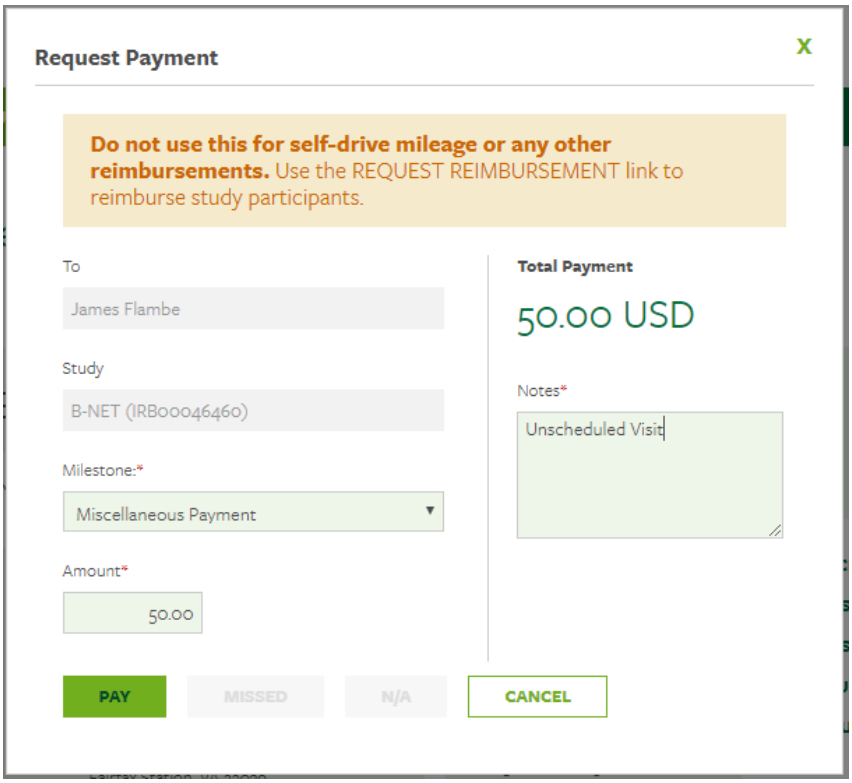
At this juncture, if the Subject has opted to receive *email and/or text messages*, they will receive a payment confirmation communication.

Make a Miscellaneous Payment

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

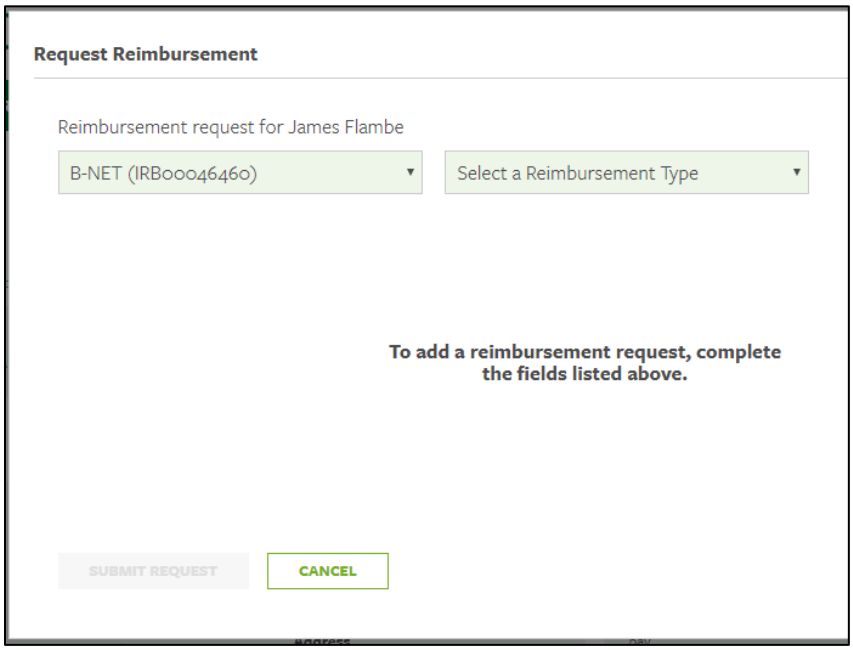


Enter the payment amount, add a comment, and click **Pay**.

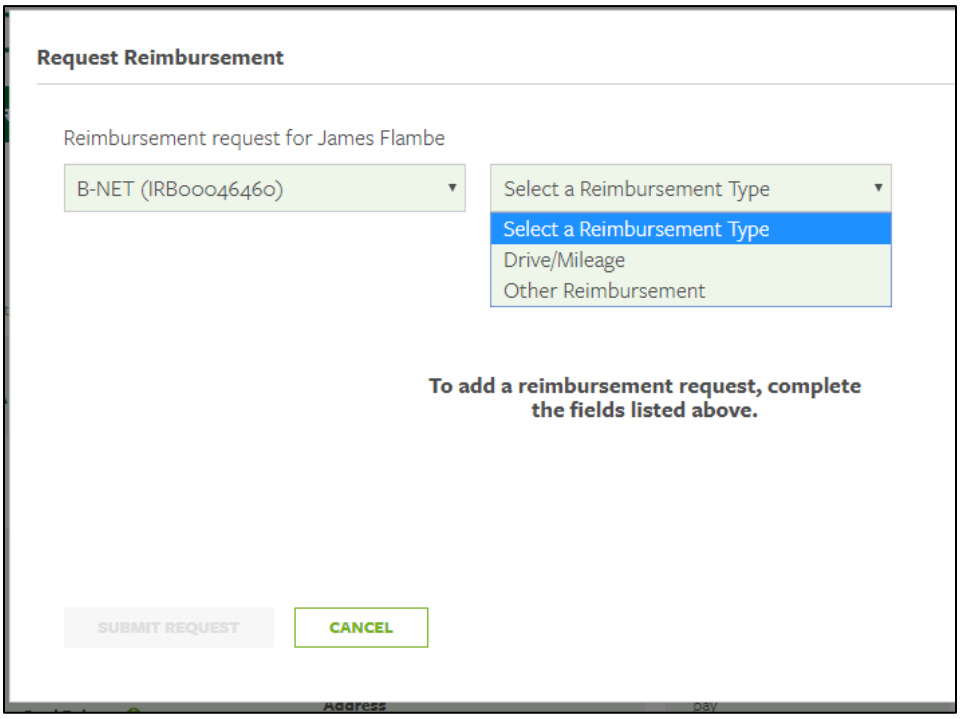


Request a Reimbursement and Upload a Receipt

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



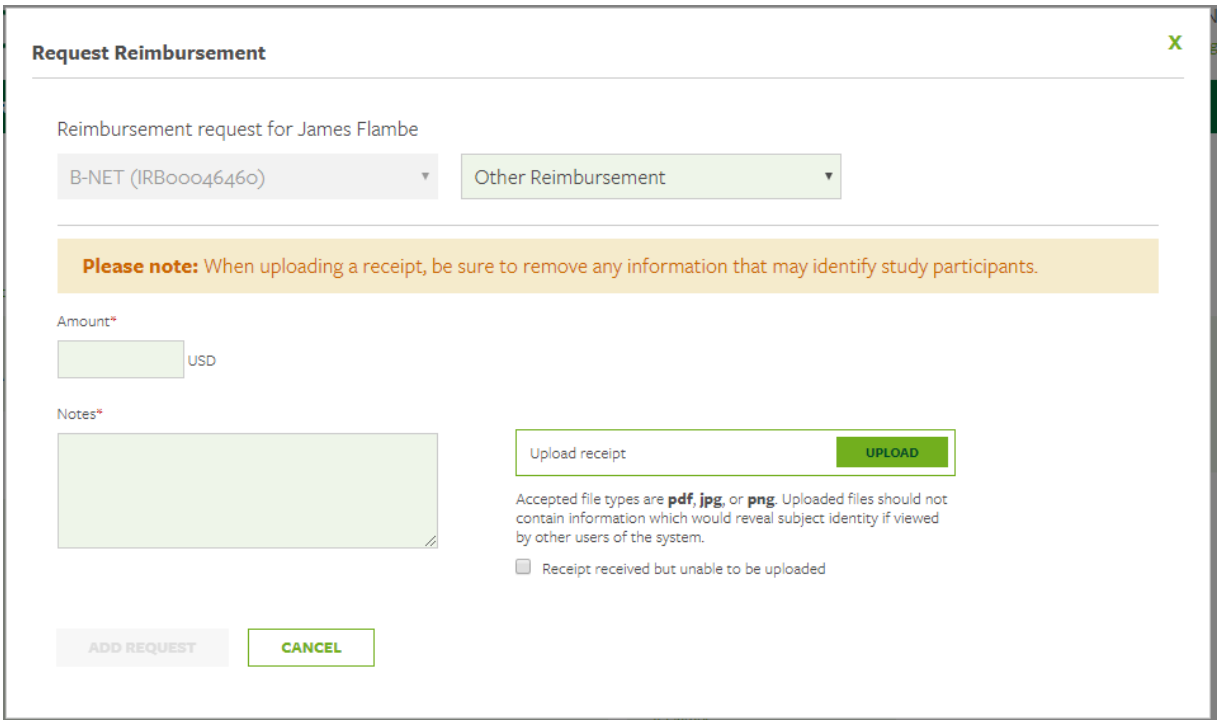
2. Select the milestone (if applicable) and reimbursement from the milestones drop-down menu.



Reimbursement options will show applicable to your study ONLY.

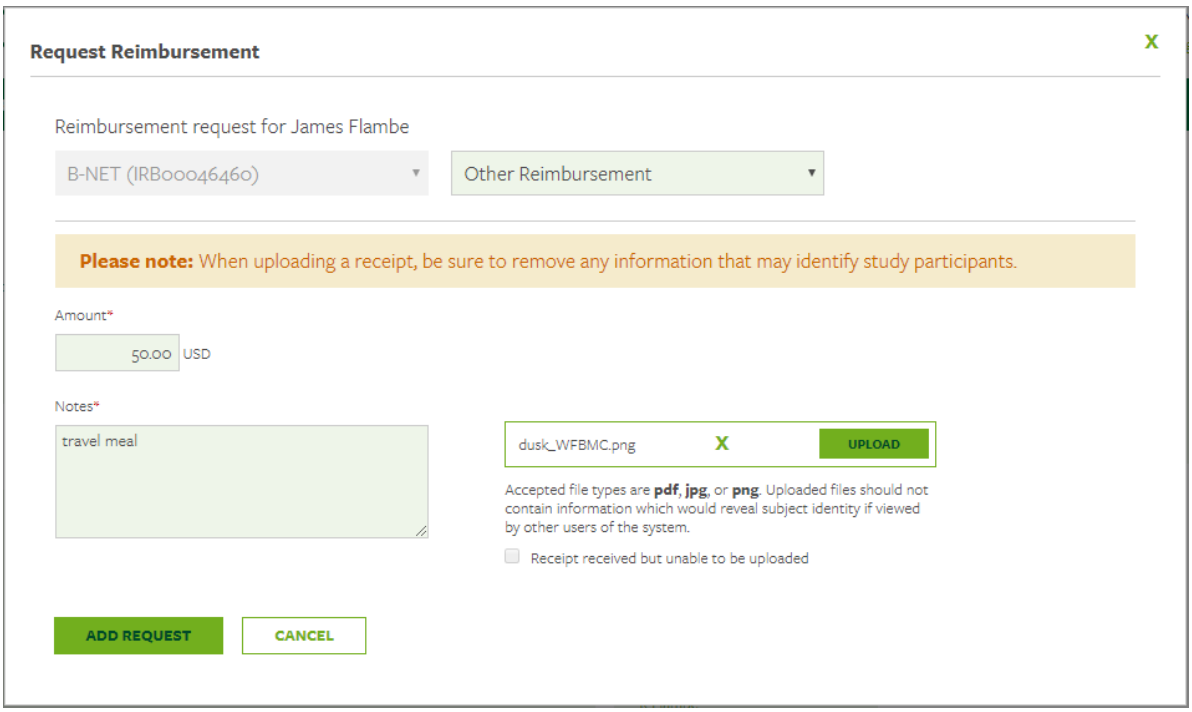
- Reimbursements can be associated with specific milestones. The list of milestones will come from the preset study payments maintained by the OCR.
- A milestone will display in the drop-down even if payout for the milestone payment has not yet occurred. Additionally, the same milestone can be reused 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.

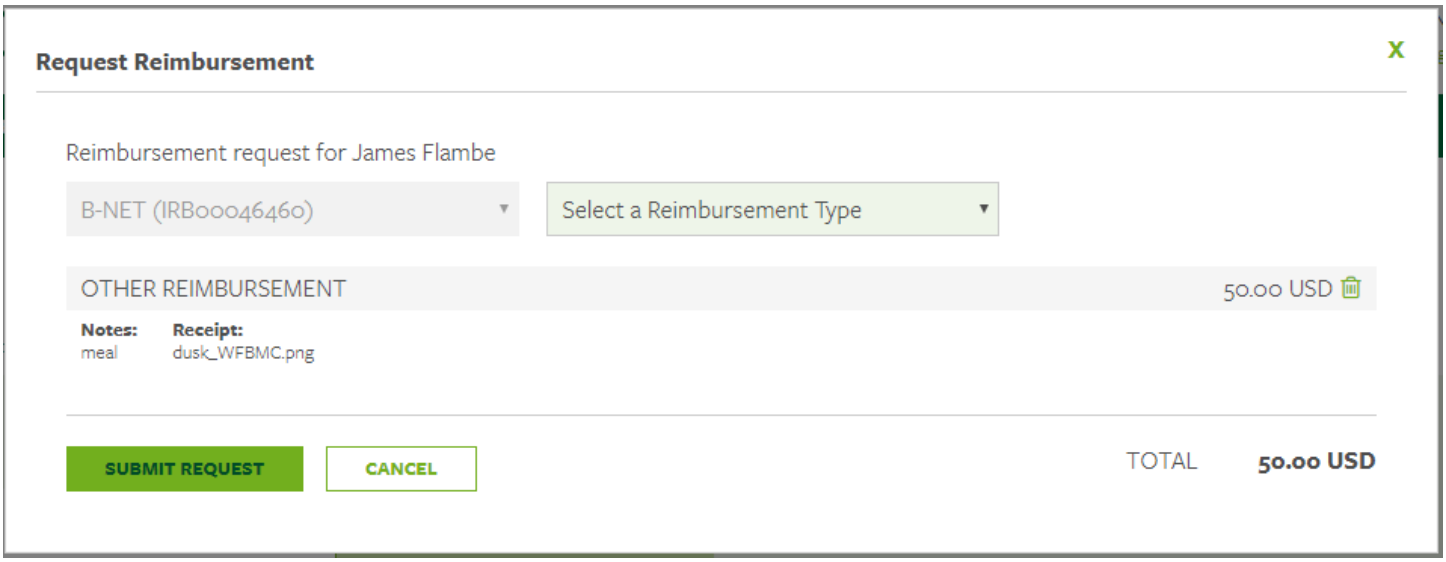


- Check the referenced checkbox if you are unable to upload the receipt for any reason. Greenphire assumes you will keep the receipt on file for that reimbursement.
- As soon as the file is accepted, you will see "Upload receipt" change to the file name.

4. Click Add Request.



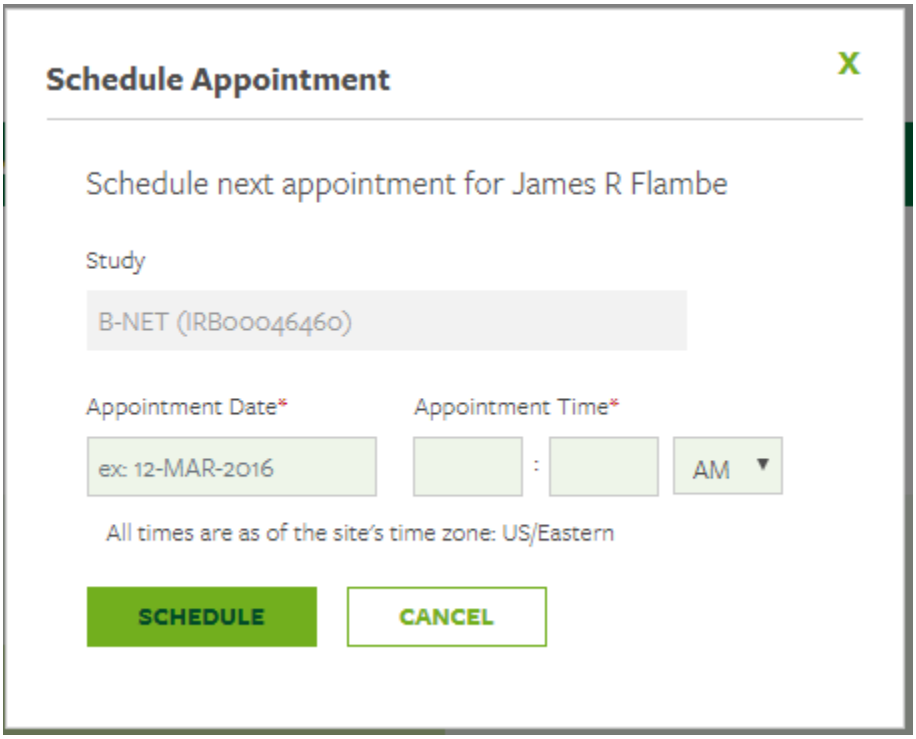
5. Once all reimbursements have been entered, click **Submit Request**.



6. Once the reimbursement has been successfully submitted, you will receive a confirmation message at the top of the "Subject Information" screen.

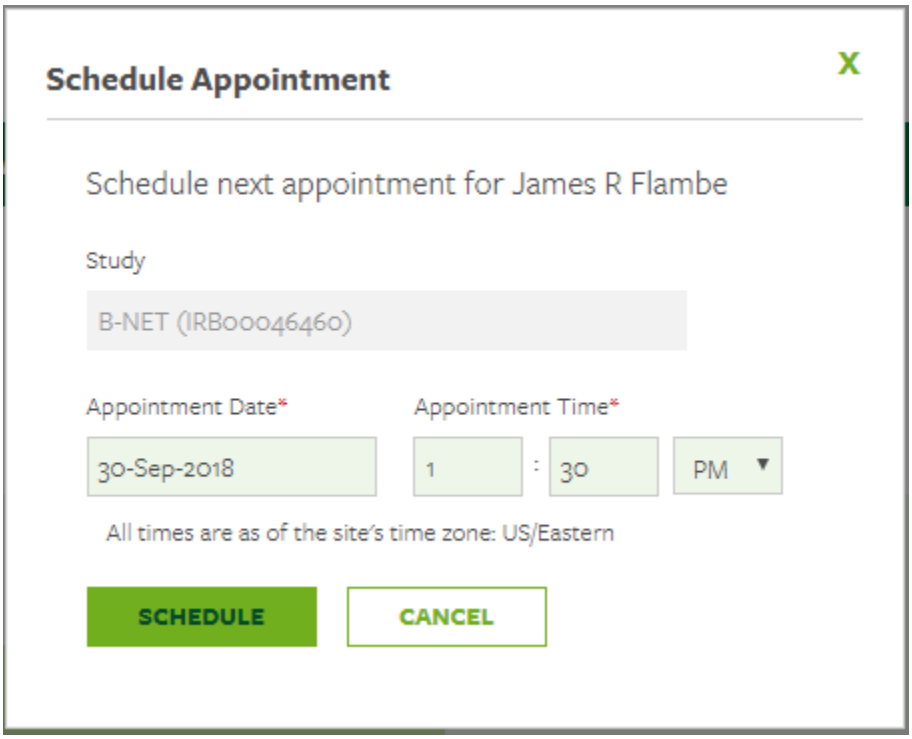
Setup an Appointment Reminder

1. Click Schedule Appointment and a pop-up menu will appear.

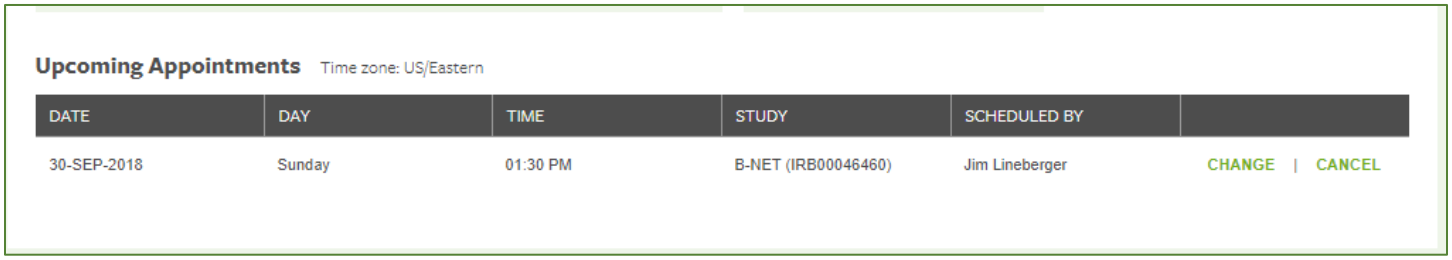


2. Use the **Appointment Date** and **Appointment Time** fields to enter the Subject's next appointment.

3. Click **Schedule**.



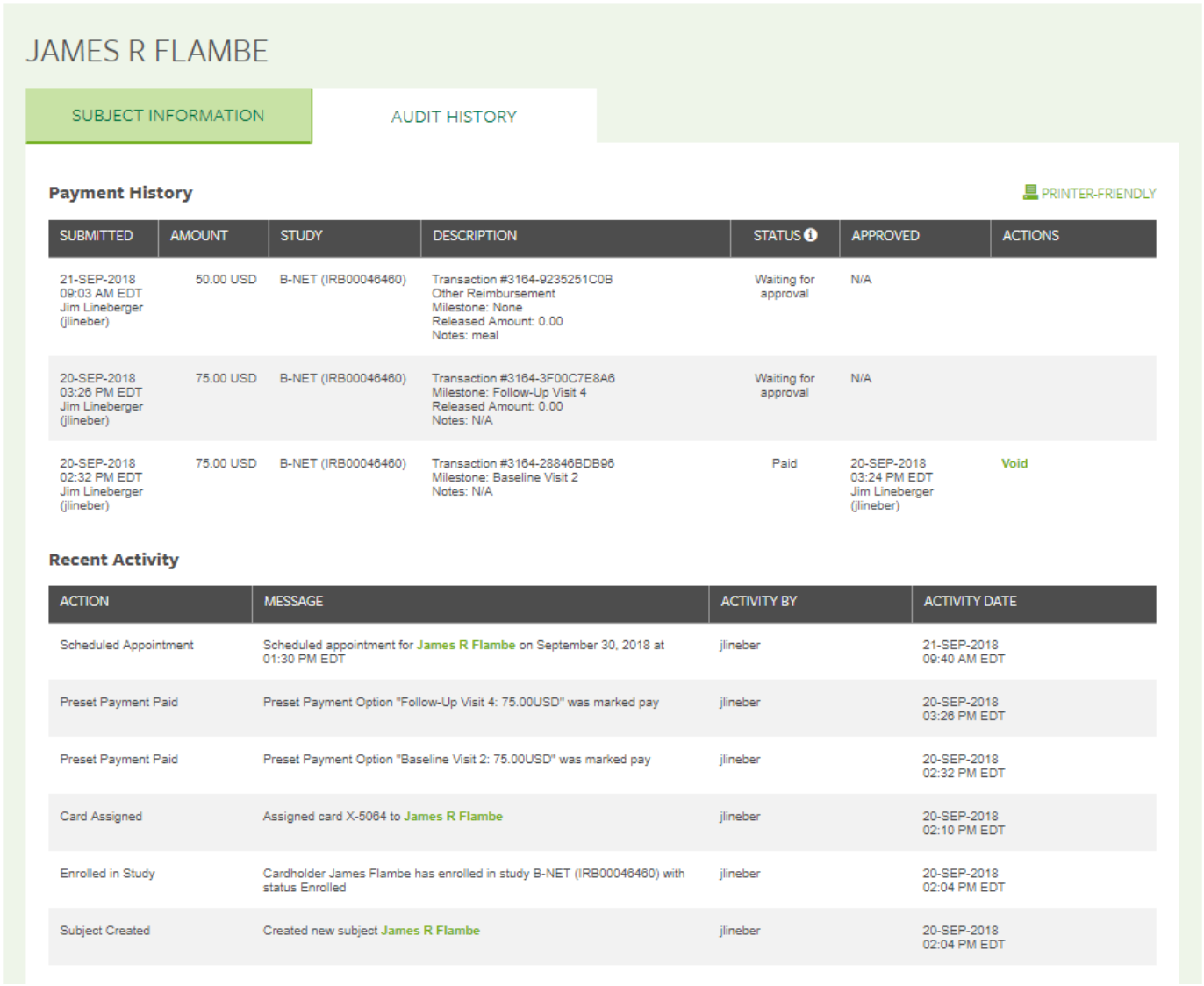
4. The appointment has been stored and will appear at the bottom of the "Subject Information" screen under the header "Upcoming Appointments".



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

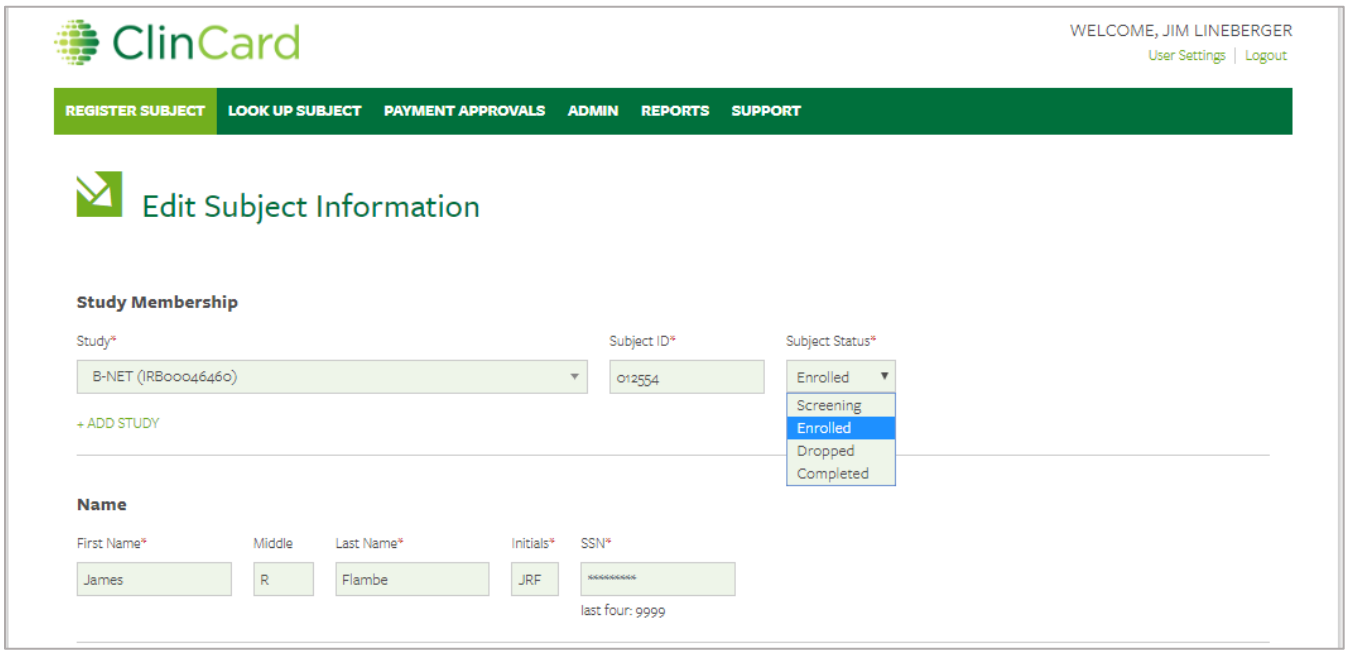
SUBMITTED	AMOUNT	STUDY	DESCRIPTION	STATUS	APPROVED	ACTIONS
21-SEP-2018 09:03 AM EDT Jim Lineberger (jlineber)	50.00 USD	B-NET (IRB00046460)	Transaction #3164-9235251C0B Other Reimbursement Milestone: None Released Amount: 0.00 Notes: meal	Waiting for approval	N/A	
20-SEP-2018 03:26 PM EDT Jim Lineberger (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 James R Flambe 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 James R Flambe	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 James R Flambe	jlineber	20-SEP-2018 02:04 PM EDT

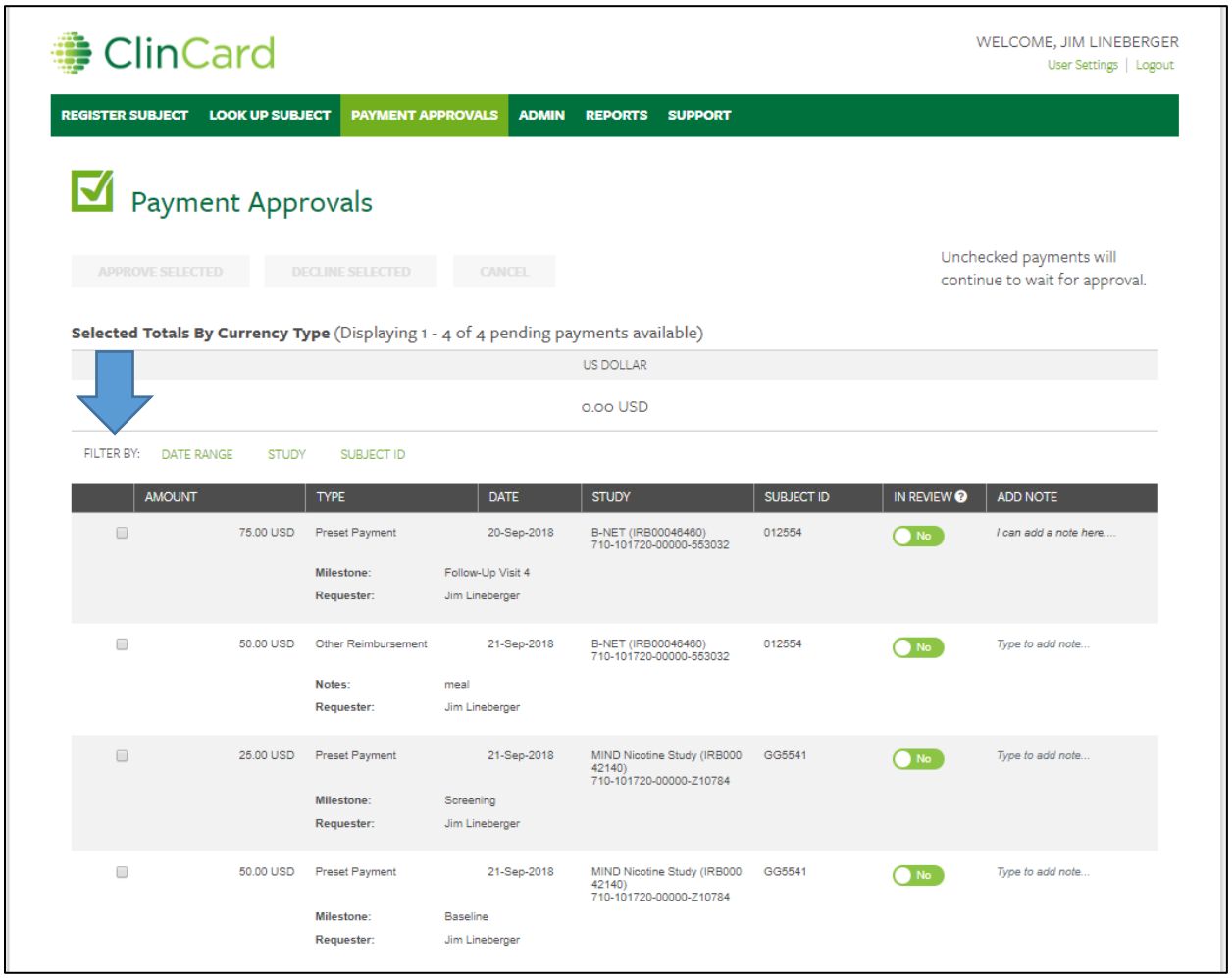
Subject Status Update

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**.



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!

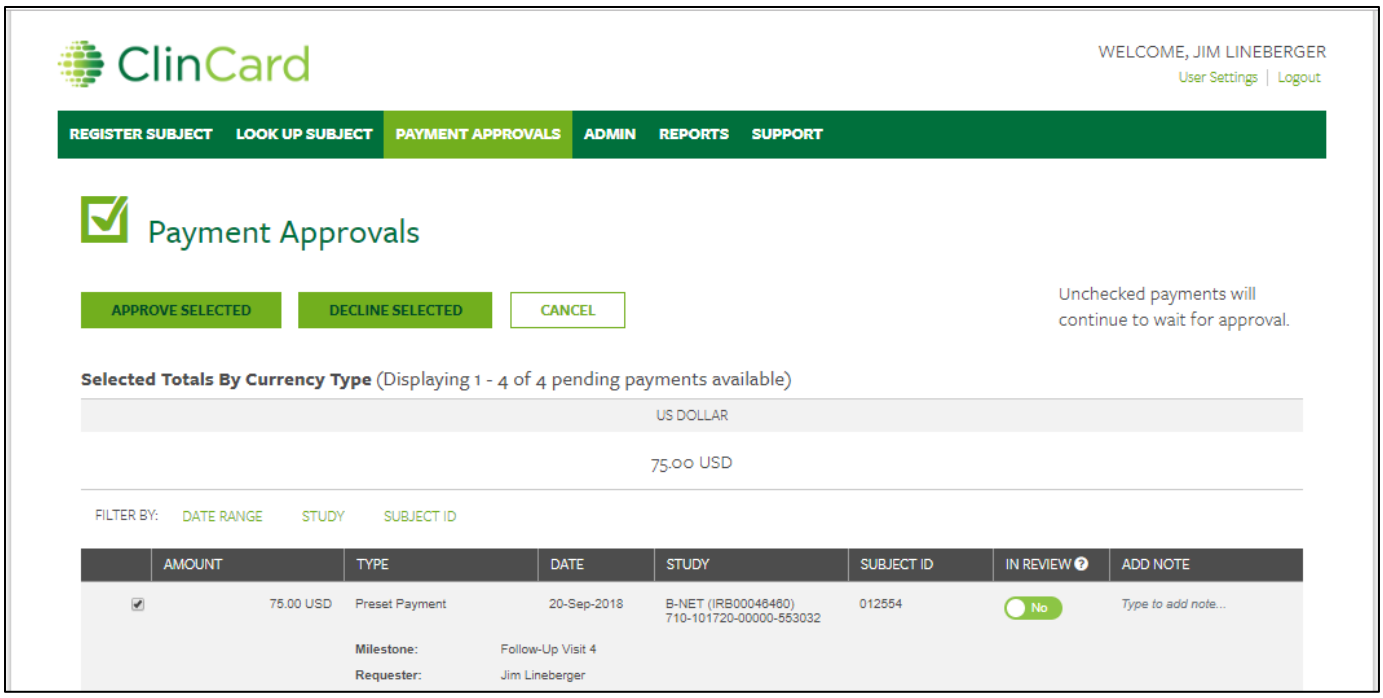


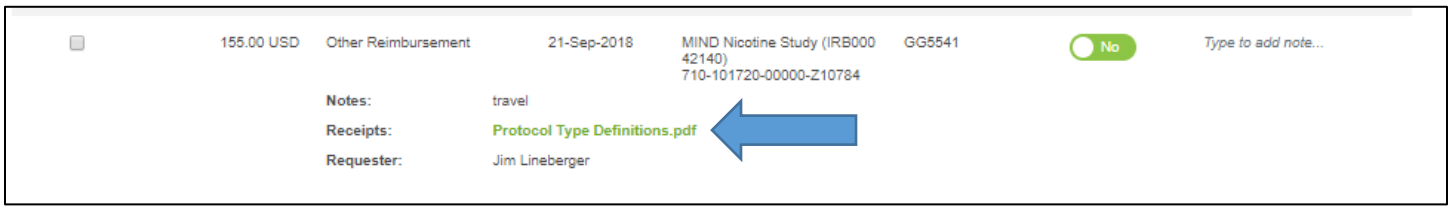
Email alerts will be sent twice daily to inform you that there are payments pending your approval. These messages are sent at 6am and 4pm EST.

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.



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.