



Quick Reference Guides

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Register a Participant

A **Study Coordinator** has the ability to register a participant in a study. Note that a participant can be registered in several studies simultaneously. A Study Coordinator will only be able to register participants in studies to which they have access in their user profile.

Steps:

1	From ClinCard's Study Coordinator landing page (Look Up Participant), click the Register Participant tab. You will be prompted to select a study.
2	<p>Select the desired study. The Participant Registration page will display.</p> <p>Note that this page will reflect some choices that were made during ClinCard configuration, for example:</p> <ul style="list-style-type: none"> • If the sponsor/CRO/Site Administrator has opted for notifications, this page will collect the participant's email address and cell phone number. • If a study has been configured for 1099 reports, TIN (Tax Identification Number) will be enabled, and a TIN field will display next to the Last Name field. • If the sponsor/CRO/Site Administrator has opted to use ClinCard's ConneX service, the participant's name entered here must be the exact name found on the participant's legal travel documents (e.g., passport or photo ID). (Note that ConneX is not relevant to Site/University clients.)
3	Enter First and Last Name , Address , and Date of Birth (Required). Note that for sponsor/CRO studies utilizing ClinCard's ConneX service, the first and last name must be the same as on the participant's legal travel documents. Also note that if you enter initials in the optional Initials field, they will be used. Otherwise, ClinCard will automatically calculate your initials.
4	<p>In the Study Status field (Required), enter one of the following:</p> <ul style="list-style-type: none"> • Enrolled – If the participant has been randomized and given a real Subject ID. • Screening – If the participant has not yet been randomized (since it is not yet clear that they will pass the screenings to become a participant). • Washout Period – This indicates that a milestone, such as a treatment or medication, requires that a period of time pass before the next upcoming milestone. Whether or not the participant has been randomized and issued a permanent Subject ID will depend on the study's practices.
5	In the Subject ID field (Required), enter the participant's Subject ID, patient number, etc., as per the study protocol. Please note that there may be validation on the formatting of this field.
6	In the Site field (Required), select the site from the dropdown provided.
7	<p>The TIN (Tax Identification) field (TIN is equivalent to the Social Security number in the U.S.) is required (for non-site/university clients) if, in the study configuration, the sponsor/CRO/site has opted for one or more of the following Greenphire services:</p> <ul style="list-style-type: none"> • 1099 Service • TIN Validation Service • Tax – Backup Withholding <p>Note that this is only applicable for the U.S. currently and applies to citizens and non-citizens alike.</p> <p>Also note that the TIN is not enforced when the client subscribes to the Tax Management Service alone because if no TIN is provided, backup withholding will go into effect for this participant.</p>
8	In the Country field (Required), select the country in which the participant has their primary residence (typically, the country in which the participant will be participating in the study).
9	In the Address field (required), begin typing the address and Google will provide results based on the country you specified in the Country field.
10	In the Timezone field, select the appropriate field from the dropdown list.
11	In the Language field, select the language in which all text and email payment confirmations and/or appointment reminders should be sent to this participant.
12	In the Date of Birth field (Required), enter the participant's data of birth.
13	In the Participant Email Address field (Required if you are opting for ClinCard's email messaging capabilities), enter the participant's email address. In addition, check the Enable Emails checkbox.

Register a Participant

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|----|--|
| 14 | In the Participant Cell Phone field (Required if you are opting for ClinCard's text messaging capabilities), enter the participant's cell phone number. |
| 15 | Finally, when all required and desired optional fields have been completed, click Register . The Participant Information page for the new participant will display. The right-hand panel of this page will display a menu containing all the tasks you can perform, based on the ClinCard capabilities and payment methods that were configured by the study sponsor. For example, if milestone and miscellaneous payment have been configured, the Request Payment menu item will appear. |

Related Topics

[Edit a Registered Participant's Information](#)

Frequently Asked Questions

If my sponsor/CRO/site has subscribed to the Tax Management service and we neglect to provide the participant's TIN, what will occur?	If Greenphire's Tax Service has been activated, but no TINs have been provided, taxes will be withheld from the participant's milestone and miscellaneous payments.
Is a TIN required if I will be requesting reimbursements for expenses incurred only, and not milestone or miscellaneous payments for this participant?	Reimbursements for expenses incurred never require a TIN, however, a TIN should be provided, since any unsubstantiated reimbursements (i.e. reimbursements with no receipt) are taxable.
The Address search is not finding the correct address for the participant. Is there any way to enter the address manually?	Yes. If no results are found, simply click on the message that is displayed below the Address field and fields for manual entry will appear.
What country should I select in the Country field if the participant is flying into the U.S. from Canada?	In this instance, you should select Canada, since that is where the participant resides.
Will the country I select in the Country field impact the languages in which patient-facing materials will be available?	No, country selection does not impact the languages in which patient-facing materials will be available. That language is specified in the SOW between Greenphire and the client.

Greenphire Support Site:

[Greenphire Support](#)

Greenphire Support Lines:

United States Toll Free:	1-844-847-0107	United Kingdom:	0208-150-5470
United States / Canada:	1-215-609-4378	International:	(+44) 208-150-6470

Edit a Registered Participant's Information

As a **Study Coordinator**, you can edit information for a registered participant.

Steps:

- 1 On ClinCard's **Lookup Participant** page, search for the participant in question, as described in the [Look Up Participant](#) quick guide. The **Participant Information** page for that participant will display.
- 2 In the right-hand list of available activities, click **Edit Participant**. The **Edit Participant Information** page for that participant will display.
- 3 From this page, you can do any of the following:
 - **Add or edit information** in the personal information fields.
 - **Add a Tax Identification Number (TIN)** for the participant, if needed. If your study requires your participant's TIN, a red asterisk will appear next to that field and you will be unable to save the profile without it. A TIN is mandatory, for example, if your study is configured for ClinCard's TIN Validation Service or ClinCard's Tax Management Service. In those two scenarios, the status of a participant's TIN, or any action needed with regards to the TIN, will display in a banner message at the top of the Participant Information page
 - **Enable email alerts** for the participant. The email alerts activated when this is checked are: **payment confirmations**, **balance reminders** and **appointment reminders**.
 - **Enable text messaging** for the participant. The text message alerts activated when this is checked are: **payment confirmations**, **balance reminders** and **appointment reminders**.

Note that when the participant has completed the study, you should ensure that Participant Status is changed to "Completed." Likewise, if the participant has dropped out of the study, you will need to change their participant to "Dropped." Doing so ensures that they can no longer be paid.
- 4 Click **Save**. The changes are reflected immediately.

Related Topics:

[Register a Participant](#)

Frequently Asked Questions

What if a participant doesn't want to provide the required registration fields (e.g., date of birth or their real address)?	For a bank to issue a debit card, a valid name, date of birth and address are required. Invalid data may result in the inability for the participant to receive customer service through the Support Help desk or could result in a closed card. If a participant does not consent to having their information in ClinCard, you will need to follow up with your Sponsor Study Contact.
Can a participant provide a P.O. box for an address?	For U.S. participants, a P.O. box is acceptable. For Canada and Europe, a P.O. box cannot be used. The participant's address must be a legitimate street address.

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Look Up a Participant

As a **Study Coordinator**, you can look up a previously registered participant and view their profile, which is provided on the Participant Information page.

Steps:

1	<p>On ClinCard's Look Up Participant page, (which is the Study Coordinator's landing page), enter one of the following:</p> <ul style="list-style-type: none"> • First and last name • Subject ID • Participant's initials • Participant's email • Last four (4) digits of the participant's ClinCard <p>Note that if no participants have been registered yet for a given study, the study will not appear in the Study dropdown on the Look Up Participant page.</p>
2	<p>Click Search. The list of applicable participants (if there are more than one) will populate. Note that the last name of any applicable participants will be a hyperlink.</p>
3	<p>Click the appropriate last name hyperlink. The Participant Information page for that participant will display.</p> <p>The right-hand column of this page will provide a list of activities you can perform in connection with this participant. This list will always reflect the ClinCard services to which this study is subscribed. For example, if you are a site in a Sponsor/CRO study that subscribes to ConneX (available to Sponsor/CRO studies only), you will likely see options related to travel, such as Create a Travel Profile.</p> <p>The list of possible activities includes:</p> <ul style="list-style-type: none"> • Assign/Replace ClinCard • Assign/Edit Bank Account • Request Payment • Request Reimbursement • Create Travel Profile • Edit Participant • Schedule Appointment • Request a Ride (if Rideshare is enabled) <p>Clicking on any of the displayed links will initiate that activity.</p>

Related Topics:

[Register a Participant](#)

[Edit a Registered Participant's Information](#)

Frequently Asked Questions

Why can't I find a participant I'm trying to locate?	You may not have the appropriate access for the study in which the participant is registered. Contact your Administrator or Sponsor Study Contact.
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Assign or Replace a Physical ClinCard

As a **Study Coordinator**, you have the ability to assign a physical card to a registered participant or replace a previous card.

Steps:

Assign a Card

- 1 From the **Lookup Participant** page, locate the participant, as described on the [Look Up a Participant](#) quick guide. The **Participant Information** page for that participant will display.
- 2 From the **right-hand menu** of options, click **Assign ClinCard**. The **Assign Card** modal will display.
- 3 In the **New Card** field, enter the token number visible through the window of the relevant ClinCard card package you received.
Note that you should not open this envelope prior to providing it to the participant. Also, you should never solicit this information or the security number from the participant, as this is a violation of banking rules. You should also never take or send a picture of the card.
- 4 Click **Assign**.
A **confirmation message** will appear at the top of the Participant Information page, as follows: "Success! The new card has been successfully assigned to <Participant Name>. The new card will be active within 10 minutes."
In addition, now that the participant has been assigned a card, a new option, "**Replace ClinCard**," now appears in the right-hand menu of possible actions. Should the participant lose this card in the future, you would click this option to have it replaced, as described below.

Replace a Card

- 1 From the **Lookup Participant** page, locate the participant, as described in the [Look Up a Participant](#) quick guide. The **Participant Information** page for that participant will display.
- 2 From the **right-hand menu** of options, click **Replace ClinCard**. The lost card will immediately deactivate and the **Replace ClinCard** modal will display.
- 3 In the **New Card** field, enter the **token number** on the outside of the envelope and click **Replace**.
A **confirmation message** will appear at the top of the Participant Information page, as follows: "Success! The new card has been successfully assigned to <Participant Name>. The new card will be active within 10 minutes." Once the card is active, the balance from the previous card will be available on the new card.

Related Topics:

[Look Up a Participant](#)

[Assign or Edit a Bank Account](#)

[Assign a Virtual ClinCard](#)

Frequently Asked Questions

Is the token number I need to enter the same as the number on the card?	No, the token number is unique and is not the same as the 16-digit card number.
What if the Participant Information page is missing the card number, although one was previously assigned?	If the card number is missing, please look up the participant's Audit History to confirm that Greenphire Support has replaced the card. If they have, the participant must activate the card. Activation will prompt the final four digits of the new card to populate on the Participant Information page.

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Assign a Virtual ClinCard

As a **Study Coordinator**, you have the ability to assign a **Virtual ClinCard** (i.e., a digital version of a ClinCard prepaid debit card, distributed electronically) to a participant registered in a study that has virtual cards enabled.

Note that depending on the **study configuration**, you could encounter one of three different card assignment scenarios:

- **Physical Only** – This will result in the standard ClinCard registration, where the token number visible through the window of the physical ClinCard card package is required when assigning a card (see the [Assign or Replace a Physical ClinCard](#) quick guide). Note that a physical study can only have a physical card assigned.
- **Virtual Only** – This will result in the virtual ClinCard registration, where a virtual card will automatically be assigned. Note that a virtual study can only have a virtual card assigned.
- **Physical or Virtual** – A physical or virtual study can have either a physical or virtual card assigned at the participant level. The Study Coordinator can select, for each participant, which card type should be assigned.

Steps:

1	Select an existing participant from the Lookup Participant page or register a new participant (see the Register a Participant quick guide). The Participant Information page will display. The right-hand panel of this page will display a menu containing all the tasks you can perform, based on the ClinCard capabilities and payment methods that were configured for the study.
2	Click Assign ClinCard . For physical-only or virtual-only studies, continue with Step 4 .
3	For physical or virtual studies , in which both physical cards and virtual cards can be assigned, an Assign Card modal will display. In the Card Type field (Required), select one of the following options from the dropdown list provided: <ul style="list-style-type: none">• Physical – If you would like to assign the participant a physical, plastic ClinCard prepaid debit card (provided to the participant by the Study Coordinator).• Virtual – If you would like to assign the participant a virtual ClinCard prepaid debit card (provided electronically to the participant by email).
4	Click the Assign Card button. <ul style="list-style-type: none">• If Physical Card Type is selected, follow the standard ClinCard (Physical Only) card assignment workflow, as described in the Assign or Replace a Physical ClinCard quick guide.• If Virtual Card Type is selected, the Assign Virtual Card modal will display. Continue with Steps 5 and 6.
5	In the appropriate fields, enter Email Address and Confirm Email Address (Required). Note that: <ul style="list-style-type: none">• Both the Email Address and Confirm Email Address fields must be manually entered. Cut and copy functionality is restricted.• Both the Email Address and Confirm Email Address fields must match. In the event of a mismatch, you will receive an error requiring you to correct before proceeding.• If the Participant Email Address field was entered during the participant registration step, the Email Address field will pre-populate with this data. (Please verify that the email address is correct.)• If you change the pre-populated Email Address field, the Participant Email Address field on the Participant Information page will also be updated.• If you enter an email address format that does not match the technical specification for a valid email address (e.g., a top-level domain (TLD) suffix such as .com, containing one @ symbol, etc.), you will be required to correct it before proceeding.
6	Click the Send button. The participant will receive an email within 5-10 minutes containing a link to access their virtual card account. (This email is available in English and Spanish and is sent based on the language selected during participant registration.) Note that once a participant is registered in a physical or virtual study and successfully assigned a card, the following will display on the Participant Information page: <ul style="list-style-type: none">• Card Type – “Physical” or “Virtual” (the card type field will not display for physical-only studies)• Card Number – Last 4-digits of the 16-digit card number• Expiration Date – (In the format: DD-MON-YYYY)
7	If you are asked, the participant can access their virtual ClinCard by following these steps: <ul style="list-style-type: none">a. Open email and click the “Access your Card” link.

Assign a Virtual ClinCard

- b. After clicking the link, the participant will be prompted to enter their access code, which is their 4-digit year of birth.
- c. Once the access code is confirmed, the participant will be able to view their card information, such as the card number, expiration date and CVV.

Related Topics:

[Register a Participant](#)

[Assign or Replace a Physical ClinCard](#)

Frequently Asked Questions

What if the participant does not have, or is unwilling to provide, a valid email address?	A virtual card cannot be assigned without a valid participant email address. Physical cards do not require a valid email address.
What if a participant does not receive the Virtual ClinCard access email?	<p>If a participant does not receive the Virtual ClinCard access email or deletes it in error, the participant must contact Cardholder Support at 1-866-952-3795 to re-trigger the email.</p> <p>Note that the Study Coordinator may also contact Cardholder Support on the participant's behalf to request that an email be re-triggered, if preferred.</p>
Does the link to access the virtual card account expire?	<p>The link within the email does not expire, so if the participant retains the email, they can use it at any time in the future to access their card details. They can also access card details through the cardholder website/mobile app (once they have registered online).</p> <p>Note that the participant will be required to verify their identity every time they access card details through the email link.</p>
What if an incorrect (invalid or outdated) email address is entered?	<p>At this time, the Study Coordinator does not have the ability to re-trigger a virtual card access email (with an existing/updated email address). The Study Coordinator can only assign an initial card or replace the card.</p> <p>Note that the Study Coordinator can either (1) Direct the participant to contact Cardholder Support at 1-866-952-3795 to re-trigger an email (and update an invalid email address if required), or (2) contact Support on behalf of the participants to re-trigger an email and/or update an email address.</p> <p>Requests to update email addresses from Study Coordinators must come in writing via the ClinCard Support tab, containing the study name, Subject ID, last 4-digits of the card number and the correct email address.</p>
When will a virtual card expire?	A virtual card is valid for 36 months from the month of card creation (i.e., the date a virtual card is successfully assigned).
How do I replace a virtual card?	Replacing a virtual ClinCard follows a similar workflow to that of the physical ClinCard replacement process, i.e., clicking on "Replace ClinCard" on the Participant Information page, but virtual cards require email verification rather than entry of a token number.
Can I change the card type?	<p>For physical or virtual studies, a card type can be changed from "physical" card to "virtual" card or vice versa.</p> <p>Note that the card number, and possibly expiration date, will change. However, funds will automatically be transferred to the replacement card, regardless of card type (requires card replacement to be issued to the same participant profile in ClinCard).</p>
Is there a limit to the number of times a participant's card type can be changed?	For physical or virtual studies, there is no limit to the number of times a card type can be changed for a participant.
How does the participant receive cardholder materials for virtual cards?	<p>The participant will receive all cardholder materials for virtual cards electronically. The virtual ClinCard access email (Subject: Your Virtual ClinCard has arrived!) will contain:</p> <ul style="list-style-type: none"> • Attachment: Cardholder Agreement PDF • Links: Cardholder FAQ and cardholder website



Assign a Virtual ClinCard

- **Other Info:** Reference to the My ClinCard mobile app, Cardholder Support Phone Number (**1-866-952-3795**), and card details (viewable online once the participant's identity is verified)

Can I assign a card to a participant located outside of the U.S.?

Cards are only authorized to be issued within the U.S. (including Puerto Rico). A participant may be registered with a non-U.S. address if their permanent address is outside the U.S. However, the participant must be physically located within the U.S. at the time they receive their virtual or physical card.

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Assign or Edit a Bank Account

As a **Study Coordinator**, you have the ability to assign a bank account to a registered participant who has been configured for direct deposit. You also may edit it if necessary.

This assumes that the study is configured for direct deposit into bank accounts (vs. configured for payment onto ClinCards).

Assign a Bank Account

Steps:

1	From the Lookup Participant page, locate the participant, as described in the Look Up a Participant quick guide. The Participant Information page for that participant will display.
2	From the right-hand menu of options, click Assign Bank Account . The Create Bank Account modal displays. Note that the message and fields displayed in this modal vary by country, however, the Bank Name, Bank Country and Currency fields will always appear and are required, regardless of the country.
3	Enter the required bank information – the bank name, account number, routing number, bank country and currency (or whatever variation is relevant to the country in question).
4	Click Submit . Once the bank account has been successfully assigned to the participant, a confirmation message will appear at the top of the Participant Information page, as follows: "Success! The bank account information has been successfully added." The bank account is available immediately.

Edit a Bank Account

Steps:

1	From the Lookup Participant page, locate the participant, as described on the Look Up a Participant quick guide. The Participant Information page for that participant will display.
2	From the right-hand menu of options, click Edit Bank Account . The Edit Bank Account modal will display. Note that the message and fields displayed in this modal vary by country. For non-U.S. countries, ClinCard displays explanatory information to help you correctly enter or edit the appropriate information. The Bank Name , Bank Country and Currency fields will always appear and are required, regardless of the country.
3	Edit the bank information – i.e, the bank name, account number, routing number, bank country and currency (or whatever variation is relevant to the country in question).
4	Click Submit . a. If the changed information is complete and correct, the information is immediately updated and a confirmation message will appear at the top of the Participant Information page, as follows: "Success! The bank account information has been successfully edited." The account is available immediately. b. If there is an error in the changed information (e.g., an entry has been made that is invalid for that country), an error message is displayed.

Related Topics:

[Look Up a Participant](#)

[Assign or Replace a Physical ClinCard](#)

Frequently Asked Questions

When I located the participant to which I intended to assign a new account, their Participant Information page's right-hand menu did not offer an Assign Bank Account option.	It is likely that this participant has already been assigned a bank account. If this is the case, you should see the Edit Bank Account option in the right-hand list of options. It's also possible that the bank account number was not entered correctly. Please confirm with the participant that what you have entered is accurate. You can also confirm this information if you request a deposit slip from the participant's bank.
Could a registered participant be configured for both ClinCard loads and direct deposit? (i.e. for a ClinCard and a bank account?)	No. Bank account or card is configured at the study level, therefore, a participant would either have a card or direct deposit, but not both.



Assign or Edit a Bank Account

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Request a Milestone Payment

A **Study Coordinator** has the ability to request milestone payments directly via the ClinCard portal, as described below.

Steps:

1	From the Lookup Participant tab, locate the participant for which you wish to request a milestone payment. See the Look Up a Participant quick guide for detailed instructions.
2	From the Participant Information page, click Request Payment from the right-hand menu. If no card or bank account has been assigned yet to this participant, you will see a message telling you so. Click OK . See Assign or Replace a Physical ClinCard or Assign or Edit a Bank Account , as appropriate, for detailed instructions. If a card has been assigned , the Request Payment modal displays.
3	From the Milestone dropdown menu (Required), select the milestone for which you're requesting payment. Note that the Missed or N/A options should only be clicked if the milestone was missed or is otherwise not applicable and you want to make sure that it is not accidentally paid, and/or that payment can be requested for the next milestone (if the study has been set up to only allow milestones to complete in a fixed order). See the Skip a Milestone or Reverse a Skipped Payment quick guide for more information on this process.
4	In the Notes field, add any notes that would further describe the milestone payment.
5	Click Pay . If the payment has been requested successfully, the following will occur: a. A success message will display briefly at the top of the Participant Information page. b. The Pending Payments area of the Participant Information page will reflect the payment amount if it is a payment that requires approval. c. The payment will also be reflected in the Recent Activity panel. Once payment has been approved and processed for the payment request, the amount will be removed from the Pending Payments area of the Participant Information page and will be reflected in the Card Balance on that page.

Related Topics:

[Skip a Milestone Payment or Reverse a Skipped Payment](#)

[View Pending Payments and Reimbursements](#)

Frequently Asked Questions

I am attempting to request a payment for a participant, but the Request Payment option is grayed out and I am seeing an error message.	If your study utilizes direct deposit, it is likely that for some reason, the participant's bank account has been put on hold, perhaps because it requires updating. Once the bank account has been updated, the hold will be removed, and the Request Payment link will once again be enabled. It may also be that your study is in a Completed status or your participant's status is "Completed." If this is the case, you will not be able to use the Request Payment link.
I don't see the Request Payment button, but I know my participants are being paid per visit.	It is possible that your study payments are being triggered via a data transfer from another study system (e.g., EDC, CTMS, etc.) based on data entered here. In this case, you will not see the Request Payment menu.
I selected the wrong visit. What are my options?	Contact Greenphire Support. If the amount of the payment made in error is still available on the card, they may be able to void it. Alternatively, choose the correct visit in the future, with a note indicating why they were made out of order.

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Skip a Milestone Payment or Reverse a Skipped Milestone Payment

On occasion, a milestone may need to be "missed" if, for example, a participant missed an appointment and therefore, as the **Study Coordinator**, you need to ensure that they are not paid for the missed visit or procedure. A milestone may also occasionally need to be designated as N/A. For example, if that milestone was completed before the study was using ClinCard.

Regardless of whether the milestone was missed or is N/A, the milestone is considered "skipped." It is not paid and is removed from the Milestone field dropdown on ClinCard's Request Payment modal, by following the instructions listed below.

The instructions for reversing a skipped milestone, should you need to, are also provided below.

Steps:

Skip a Milestone Payment

- 1 From the **Lookup Participant** tab, locate the participant for which you wish to request a payment. See the [Look Up a Participant](#) quick guide for detailed instructions.
- 2 From the **Participant Information** page, click **Request Payment** from the right-hand menu. The **Request Payment** modal displays.
- 3 From the **Milestone** dropdown menu (Required), select the milestone you'd like skipped, then click the **Missed** button.
- 4 Click **Submit**.
A temporary message will indicate that the "payment" was made successfully. What this means, in this case, is that the milestone was not paid and is no longer available in the Milestone dropdown menu.

Reverse a Skipped Milestone Payment

- 1 From the **Lookup Participant** tab, locate the participant for which you wish to reverse a skipped payment. See the [Look Up a Participant](#) quick guide for detailed instructions.
- 2 Click the **Audit History** tab. Any milestones that were designated as Missed or N/A will be designated as "Skipped" in the **Status** column. In the **Action** column, you will see a link to **Reverse Skip** that milestone.
- 3 Click the **Reverse Skip** link. The **Reverse Skip** modal displays.
- 4 In the **Comment field** (Required), enter a description of why the payment was skipped and then click **Reverse Payment Skip**. The milestone will once again appear in the Milestone dropdown menu.

Related Topics:

[Request a Milestone Payment](#)

[View Pending Payments & Reimbursements](#)

Frequently Asked Questions

I've marked a visit as skipped in error. What are my options?

As a Study Coordinator, you can undo a skipped payment using the instructions provided above or contact Greenphire Support to have them reverse it for you.

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International: (+44) 208-150-6470

Request a Miscellaneous Payment

Occasionally, payment is needed for an event that is not connected to the contracted study schedule. For example, a participant may be asked to come in for an unscheduled visit. That visit will need to be paid. Note that miscellaneous payments typically require secondary approval.

As a **Study Coordinator**, you can request payment for these unscheduled costs via the ClinCard portal.

Steps:

1	From the Lookup Participant tab, locate the participant for which you wish to request a miscellaneous payment. See the Look Up a Participant quick guide for detailed instructions.
2	From the Participant Information page, click Request Payment from the right-hand menu.
3	From the Milestone dropdown menu (Required), select Miscellaneous Payment . The Miscellaneous Payment modal displays. Note that if your study is configured to allow reimbursements for expenses incurred, a warning will display at the top of the modal informing you that this modal is not intended to be used for requesting a reimbursement. That is a separate process for which you would refer to the Request a Reimbursement quick guide.
4	In the Amount field (Required), enter an appropriate description for this miscellaneous payment (e.g., Unscheduled visit).
5	In the Notes field (Required), enter the payment value being requested.
6	Click Pay . If the payment has been requested successfully, the following will occur: <ul style="list-style-type: none"> a. A success confirmation message will display briefly at the top of the Participant Information page. b. The Pending Payments area of the Participant Information page will reflect the payment. c. The payment will also be reflected in the Recent Activity panel. Once payment has been approved and processed for the payment request, the amount will be removed from the Pending Payments area of the Participant Information page and will be reflected in the Card Balance on that page.

Related Topics:

[View Pending Payments and Reimbursements](#)

Frequently Asked Questions

What if there is no card assigned?	Check the participant's Audit History tab. A replacement card may already be in transit. The replacement card will need to be activated by the participant.
I am attempting to request a payment for a participant, but the Request Payment option is grayed out and I am seeing an error message.	If your study is utilizing direct deposit, it is likely that for some reason, the participant's bank account has been put on hold, perhaps because it requires updating. Once the bank account has been updated, the hold will be removed, and the Request Payment link will once again be enabled. It may also be that your study is in a Completed status or your participant's status is "Completed." If this is the case, you will not be able to use the Request Payment link.
Are miscellaneous payments taxable?	Yes, miscellaneous payments are considered income, and therefore, are taxable.

Greenphire Support Site:

[Greenphire Support](#)

Greenphire Support Lines:

United States Toll Free:	1-844-847-0107	United Kingdom:	0208-150-5470
United States / Canada:	1-215-609-4378	International:	(+44) 208-150-6470

Request a Reimbursement

Reimbursements may be requested for costs incurred, usually in association with a milestone. For example, while spending an afternoon at a clinic for a scheduled visit or procedure, a participant incurred some meal expenses. (Expenses eligible for reimbursement will have been configured during ClinCard implementation, based on the study requirements. This could include expenses associated with travel to the clinic as well.)

As a **Study Coordinator**, you may request reimbursement for any of the eligible costs.

Note that if your study requires receipts, any reimbursements for which a receipt isn't provided will be considered taxable income, so please ensure that Step 7 is completed.

Steps:

1	From the Lookup Participant tab, locate the participant for which you wish to request a reimbursement. See the Look Up a Participant quick guide for detailed instructions.
2	From the Participant Information page, click Request Reimbursement from the right-hand menu. The Request Reimbursement modal displays.
3	<p>Proceed as follows:</p> <ol style="list-style-type: none"> If the reimbursement is not associated to a milestone, proceed with Step 4. If the reimbursement is associated to a milestone, a Select a Milestone dropdown will display on the Request Reimbursement modal. Select the milestone to which this reimbursement is associated. <p>Note: When milestones are associated with reimbursements, selecting a milestone will not remove it from the Milestone dropdown. In fact, the same milestone can be reused – i.e. associated with multiple reimbursements.</p>
4	<p>In the Reimbursement Type field, select the desired reimbursement type from the dropdown menu. Note that the list in this dropdown menu represents the reimbursement types configured for this particular study by the sponsor during ClinCard implementation.</p> <p>Once the reimbursement type is selected, the Request Reimbursement page expands to display additional fields.</p>
5	In the Amount field (Required), enter the amount being requested.
6	In the Notes field (Required), enter a description of the reimbursement requested.
7	<p>If your study does not require receipts for reimbursement requests, please proceed with Step 8.</p> <p>If your study requires receipts for reimbursement requests, to upload a receipt, click Upload and select the receipt (pdf, jpg or png files are allowed). As soon as the file is accepted, "Upload Receipt" will change to the file name.</p> <p>Note: All personally identifiable information (PII) should be redacted from any receipts being uploaded.</p> <p>If a receipt exists, but cannot be uploaded, make sure to check the box indicating "Receipt received but unable to be uploaded."</p>
8	Click Add Request . The modal will now allow you to request another reimbursement. To do so, follow Steps 3-8. Otherwise, proceed with Step 9.
9	<p>Once all the desired reimbursements requests have been entered, click Submit.</p> <p>If the payment has been requested successfully, the following will occur:</p> <ol style="list-style-type: none"> A success message will display briefly at the top of the Participant Information page. The Pending Payments area of the Participant Information page will reflect the reimbursement. The payment will also be reflected in the Recent Activity panel. <p>Once payment has been approved and processed for the reimbursement request, the amount will be removed from the Pending Payments area of the Participant Information page and will be reflected in the Card Balance on that page.</p> <p>If the participant has opted to receive email and/or text messages, they will also receive a payment confirmation communication at that time.</p>

Related Topics:

[View Pending Payments and Reimbursements](#)

Frequently Asked Questions

Does a receipt need to be included?

If your study requires receipts and a receipt is not included, or the "Receipt received but unable to upload" box is not checked, the reimbursement will be taxable.

Request a Reimbursement

Is there anywhere in ClinCard where I can view whether a given milestone has been associated with reimbursements?

Yes, when a milestone has been selected in conjunction with a reimbursement, this will be displayed on the Audit History page, the Payment Approvals page and the Payment Detail Report.

I am attempting to request a reimbursement for a participant, but the Request Reimbursement option is grayed out and I am seeing an error message.

It is likely that for some reason, the participant's bank account has been put on hold, perhaps because it requires updating. Once the bank account has been updated, the hold will be removed, and the Request Reimbursement link will once again be enabled.

It may also be that your study is in a Completed status or your participant's status is "Completed." If this is the case, you will not be able to use the Request Payment link.

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[Greenphire Support](#)

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View Pending Payments and Reimbursements

As a **Study Coordinator**, you can view payments and/or reimbursements pending for a particular subject, as described below.

Steps:

- 1 From the **Lookup Participant** tab, locate the participant for which you wish to request a reimbursement. See the [Look Up a Participant](#) quick guide for detailed instructions.
- 2 From the **Participant Information** page, click the **Audit History** tab. The **Audit History** page displays.
Note that a printer-friendly version is available via the Printer Friendly link.
- 3 The **status** column will indicate if any payments or reimbursements are pending and their respective status, e.g., "Attempting to load" or "Waiting for Approval." If payments or reimbursements have been completed and a receipt was provided for a given reimbursement, the user will see the option to view the receipt.

How can I tell the status of a payment?	The status of a payment can be located on the subject's Audit History tab. Descriptions of each status can be located by hovering over the (i) icon. More information about a specific payment can be located by hovering over the (?) icon next to a payment.
If there is no card assigned to a subject, how can I tell if one has been ordered by Greenphire?	Replacement cards ordered by Greenphire will show up on the subject's Audit History tab as Assigned a new card. These cards will not show up on the Participant Profile until activated by the participant.
The payment I am viewing shows a status of "Attempting to load." What should I do?	Contact Greenphire Support, as there may be something preventing the payment from being loaded onto the participant's card.

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[Greenphire Support](#)

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Whom Do I Contact?

As a **site** participating in one or more **sponsor/CRO studies**, you will occasionally have questions or require support with Greenphire's ClinCard solution. This quick guide will help you direct your communication to the right contact for quick resolution.

Note that the following browsers result in the optimal ClinCard experience: Google Chrome™, Firefox™ and Microsoft Edge™. Internet Explorer™ is no longer supported.

For the following:	Greenphire Support	Sponsor/CRO Study Contact	Please Note:
User Access Inquiries			
Login support	✓		Use the link in the initial email for first-time setup, then set up your own password once logged in.
Password update support	✓		Use the link in the Password Reset email, and then set your own password once logged in.
New user request(s) requiring Sponsor/CRO approval	✓	✓	Please send an email to Greenphire Support detailing the sponsor/CRO's requirements for user access.
Card Order Requests			
Participant lost card	✓		Study Coordinators can replace a participant's lost card. Otherwise, please instruct the cardholder to contact Cardholder Support to request a card replacement.
New participant is scheduled for screening and card hasn't arrived	✓		
Card order replenishment – requiring sponsor/CRO approval		✓	You must provide all requirements every time the card order needs to be replenished. These include shipping contact, contact's phone number and email, card package ID and quantity.
Card order status	✓		It takes approximately 7-10 business days for delivery once a card order has been shipped.
Cardholder Inquiries			
Purchasing hold on card	✓		Please instruct the cardholder to reach out directly to Cardholder Support. A site user may not inquire about this process, per privacy regulations.
Expired card	✓		The cardholder may reach out to Cardholder Support.
Card fees	✓		Card fees are outlined in the cardholder agreement that is attached to every ClinCard in the sealed envelope provided.
Payment Status (Reimbursement or Visit/Procedure Milestone)			
Payment status	✓		Before contacting Greenphire Support, please review the participant's Audit History to ensure your payment is not awaiting approval. Additionally, please see the info (i) icon for a description of the payment.
Declined Payment		✓	Payments are approved and declined by the sponsor/CRO.
Voiding payments	✓		Please submit this request in writing. A valid reason for the void is required, along with the last 4 digits of the card, the Subject ID, Amount and Transaction ID.
ClinCard Technology Issues			
Payment delays	✓	✓	Please check on your browser, issuance balance and participant profile prior to reporting a payment delay to Greenphire Support.

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