ClinCard FAQ for UAB Departments

What is Greenphire?
Greenphire is the name of the vendor providing the new study participant payment system for UAB. The system uses reloadable ClinCards to pay both clinical and research study participants. This payment system will replace petty cash and the Visa gift card payment methods currently used by many studies. If you pay your participants via check, you will have the option of continuing to do so or using the Greenphire system.

How does it work?
All of your studies and their associated payment schedules will be pre-loaded into the web-based Greenphire system. Users that you select will have the ability to log into that system in order to add participants to your study and to make payments to those participants on their reloadable debit cards.

What participant information will we need to start using the Greenphire system?
At the very least, you must have the participant's name, address, date of birth, and social security number. You will also have the option of entering the participant's cell phone number or e-mail address if they would like to receive notification when a study payment has been loaded on their card.

> **What if a participant does not have a social security number?**
> Unless your study has been granted an exception*, social security numbers are required of all participants.

> **What if a participant does not have an address?**
> If a participant is homeless, you should ask if there is a relative's address that they can use. If this is not possible, then you should ask if there is a shelter where they sleep.

What are the costs to the department of using this system?
From now until at least 09/30/19, the University will absorb all costs associated with implementing and using this system. Each time a payment is loaded onto a participant's card, UAB will be charged $1.15 by Greenphire. The university is absorbing this cost until 09/30/19 in order to give you time to include these load fees into the next budget period of your study.

Do I have to amend my informed consent form?
If your informed consent form specifies a method of participant payment, then you will need to amend the form and have it reviewed for approval by IRB. If you are using the IRB-recommended template that specifies that a participant will be paid but does not specify a method of payment, no amended form is needed.

Can I give my participants the card holder FAQ provided by Greenphire?
Yes. UAB's IRB has stated that this FAQ can be given to your participants.

Does Greenphire's data security meet UAB's IRB data security requirements?
Yes.

We offer participants travel reimbursement; will this be available in the Greenphire system?
Not at this time. The Greenphire system is not capable of handling the UAB approval process for participant travel reimbursement. If you are offering travel reimbursement, you will have to process that as a payment request in the Oracle system.

What if one of my participants loses his/her card?
The participant should notify the study coordinator who will be able to replace if 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.

How do I get a new study entered into the Greenphire system?
As we convert to this new system, the studies in your area will be pre-loaded into the Greenphire system. After that, any new study will be entered based on the information provided in the new study application.

How do I request the ClinCards for my study?
When your area receives training on how to use the system, you will receive an initial supply of ClinCards for use in your department. When the supply begins to run low, you can request more cards by sending an e-mail to FA-grantsaccting@mail.ad.uab.edu with **GREENPHIRE – Cards Needed** in the subject line. In the body of the e-mail, include your 9-digit org code and the number of cards needed (we recommend that you keep no more than one-month's supply on hand). You will be notified via return e-mail when the cards are ready for pick-up in AB 990.

What if we want to add or remove an employee who has access to our studies in Greenphire?
If you need to make any changes to the information you provided when your study was set up in Greenphire (study staff, participant payment descriptions or amounts, account number, etc.), please send an e-mail to FA-grantsaccting@mail.ad.uab.edu with GREENPHIRE in the subject line. In the body of the e-mail, include the study name and IRB number and any changes needed.

What if we want to add, remove, or edit the study information found in Greenphire?
If you need to make any changes to the information you provided when your study was set up in Greenphire (study staff, participant payment descriptions or amounts, account number, etc.), please send an e-mail to FA-grantsaccting@mail.ad.uab.edu with GREENPHIRE in the subject line. In the body of the e-mail, include the study name and IRB and any changes needed.

What reports are available from the Greenphire system?
There are a number of reports available in the Greenphire system, all of which are downloadable to Excel. The most useful of these is detailed below. Access to view reports for your area is assigned to each person when he/she is set up as a user. If you do not have access to reports, please contact the appropriate person in your department to request this access.

Payment Detail Report displays the finite details of each payment that has been made for all studies to which you have access. This report can be filtered by date range and is the most comprehensive report you will have access to. Within this report you will see the following:

        Date participant payment was requested

        Transaction ID – unique number assigned by the Greenphire system

        Study name – as assigned to your study (ex: 31-Pulm ALIAS 100000612)

        Name of user who requested the payment

        Name of user who approved the payment

        Site number – Not in use by UAB at this time

        Site Name – Should be UAB All Study (Central)

        Last four digits of the participant's ClinCard number

        Subject ID – participant's unique study number assigned by you

        Date payment was approved

        Transaction date – date funds were added to participant's ClinCard

        Transaction type – will usually be ADD FUNDS

        Amount – dollar amount paid to participant for this transaction

        Description – denotes milestone (ex: Visit 1, Follow-Up, Survey Completion, etc.)

        Payment Notes – any notes entered by the coordinator will display here

        Approval Note – any notes entered by the approver will display here

        Study ID – Account number associated with study in the Oracle system

Payments by Study provides an overview of all payments for studies you have permission to access. This report can be filtered by date range or study status. For each study you have access to, this report will show you the following:

        Study name – as assigned to your study (ex: 31-Pulm ALIAS 100000612)

        Study status – Active, Completed, or Canceled (No Activity)

        Study ID – Account number associated with study in the Oracle system

        Study creation date – Date study was set up in the Greenphire system

        Number of unique participants paid

        Number of payments made

        Total payments – sum of all dollars paid to participants

        Average payment – total payments / number of payments

Payments by Subject provides a payment overview for each subject. This report can be filtered by study and by date range. This report will show you the following:

        Subject ID – participant's unique study number assigned by you (clicking on the Subject

                ID hyperlink will re-direct you to the Patient Detail Report)

        Site number – Not in use by UAB at this time

        Site name – Should be UAB All Study (Central)

        # payments – total number of payments made to specific participant

        Total payments – sum of all dollars paid to participant

        Average payment – total payments / number of payments

Patient Detail Report provides a detailed breakdown of each payment made to a specified participant. Please note that this report may only be accessed via the Subject ID hyperlink available within the Payments by Subject report. This report will show you the following:

- Subject ID – participant's unique study number assigned by you
- Transaction ID – unique number assigned by the Greenphire system
- Site Coordinator – name of user who requested the payment
- Amount – dollar amount of payment
- Transaction date – date payment applied to ClinCard
- Payment description - denotes milestone (ex: Visit 1, Survey Completion, etc.)
- Notes - any notes entered by the coordinator will display here