How to Login to www.clincard.com

1) Login to www.clincard.com.

2) Enter your login and password as provided to you. Keep in mind that your login and password are case sensitive so make sure to use capital letters as necessary.

3) If you have difficulty logging into www.clincard.com, please click on the “Forgot username and password?” link, enter your email address, and click “Reset my password.” This will instantly send you an email with a link allowing you to reset your password.

Note: You can also call Greenphire’s site support team at 215-609-4378.
How to Look Up a Subject - Always Do This Step First

1) Login to www.clincard.com.
2) If you are a Site Coordinator, the first window you see after login should be the Look Up Subject window. If not, you can click on “Look Up Subject” in the toolbar.

3) Search for the subject you want to pay by entering one of the following pieces of information and click on “Search”
   a. First name or last name
   b. Subject ID
   c. Subject’s initials
   d. Subject’s e-mail address
   e. Last four digits of the ClinCard assigned to the subject
4) If the subject is found, click on the highlighted name of the Subject

5) The “Subject Information” screen will open where you can perform any of the actions required for the subject, e.g., add another study or issue payment.
6) If the subject already exists in the system and has been enrolled in the 00 - ALL STUDY - UAB, then skip to the section on “How to Register a Subject in an Additional or Extension Study.”

7) If the subject cannot be found, then you must follow the next steps and register that subject in the 00 - ALL STUDY - UAB, first.

▶ How to Register a Subject

1) Login to [www.clincard.com](http://www.clincard.com).

2) If you have already searched for a Subject (see previous directions) and know that they are not yet in the system, click on “Register Subject” in the toolbar.

3) From the “Select Study” drop-down menu, choose “00 - ALL STUDY – UAB” (all UAB patients/subjects MUST be entered in this study, first).
4) Enter the required information into the brief form. At minimum, you must include the subject’s first name, last name, initials, SSN, address, and DOB. **Note:** If you would like the Subject to receive payment confirmations or appointment reminders, be sure the “Email (Enable)” and/or “Text Messaging (Enable)” checkboxes are selected.

5) Click on the “Register” button at the bottom of the Subject Registration page.
6) The “Subject Information” screen will open where you can enroll the subject in your study, assign a ClinCard, make a payment, schedule an appointment reminder, replace a ClinCard or edit a subject’s information.

7) If you have difficulty making a payment for the first time please call the ClinCard site support team at 215- 609-4378 and Greenphire staff will be happy to walk you through it.

How to Register a Subject in an Additional or Extension Study

1) Locate the existing “Subject Information” page through the “Look Up Subject” menu tab and clicking on the last name of the subject to open the participant’s subject information tab. (If you have just enrolled the subject in the 00-ALL STUDY UAB, you should be on the correct page.)

2) Click on the Edit Subject option in the list to the right
3) Click on the **Add Study** link located under the list of the subject’s current study(ies)

![ClinCard](image)

**Edit Subject Information**

**Study Membership**

<table>
<thead>
<tr>
<th>Study</th>
<th>Subject ID</th>
<th>Subject Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>00 - ALL STUDY - UAB</td>
<td></td>
<td>Enrolled</td>
</tr>
</tbody>
</table>

- **ADD STUDY**

and select your study from the drop-down menu

**Study Membership for UAB All Study (Central)**

<table>
<thead>
<tr>
<th>Study</th>
<th>Sul</th>
</tr>
</thead>
<tbody>
<tr>
<td>00 - ALL STUDY - UAB</td>
<td></td>
</tr>
</tbody>
</table>

-- Select Study --

311600000 - 2013127 - 131223001
311600000 - 2014043 - 141024002
311600000 - 2015336 - 150826004
311600000 - 2017540 - 170615010
4) Enter the new **Subject ID** (this should be specific to your study) and enter or select the **Subject Status**.

![Edit Subject Information]

**Study Membership for UAB All Study (Central)**

<table>
<thead>
<tr>
<th>Study ID</th>
<th>Subject ID</th>
<th>Subject Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>00 - ALL STUDY - UAB</td>
<td>-</td>
<td>Enrolled</td>
</tr>
<tr>
<td>311600000 - 201327 - 13123001</td>
<td>AFD079</td>
<td>Enrolled</td>
</tr>
</tbody>
</table>

5) Scroll to the bottom of the page, and click “Save.”

This will enroll the subject in your study in addition to the 00-ALL STUDY UAB in which all subjects must be enrolled, first.

**How to Assign a ClinCard to a Subject:**

Once you have selected an existing subject or registered a new subject, the “Subject Information” screen will open. On the right hand side of the screen, you will see options that represent all of the actions you can perform on the Subject.

**Note:** If the subject already has a ClinCard assigned, you should not assign another card. (You can tell the subject already has a ClinCard if the first option in the list of options to the right-hand side of the screen is “Replace ClinCard” instead of “Assign ClinCard.”)
1) Click on “Assign ClinCard” and a pop-up screen will appear.

![Assign ClinCard](image)

2) In the “New Card” field, enter the 8-digit token number visible through the window of one of the ClinCard card packages you received.

**Note:** There is no need to open the envelope prior to providing to the Subject.

![ClinCard Image](image)

3) Click on the “Assign” button

4) Once the card has successfully been assigned, you will receive a confirmation message at the top of the “Subject Information” screen
5) Now an option to “Replace ClinCard” appears. In the event that a subject loses their card, you can replace that card for them by clicking on “Replace ClinCard,” and follow the steps above, using the 8 digit token number from a new ClinCard card package

**Note:** This will inactivate the lost card and automatically transfer any available/pending balance to the newly assigned ClinCard

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**How to Request a Payment:**

Once you have selected a subject or registered a new subject, 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.

**Note:** If the subject has a ClinCard assigned, follow the next steps. If the subject has no ClinCard assigned, see the previous “How to Assign a ClinCard to a Subject” instruction section.

1) Verify that the “Study Name” field displays the name of the study for which you wish to make a payment. If the subject is enrolled in more than one study, you may have to select your study from the “Study Name” drop-down menu
2) Click on “Request Payment” and a pop-up screen will appear

3) Select from the dropdown box which milestone the patient is being paid, e.g., Visit 1, Visit 2, etc.
4) Click on the “Pay” button.

5) Once the payment has successfully been requested the “Pending Payment” area of the “Subject Information” screen will reflect the payment. It will also be reflected in your “Recent Activity”

6) Once a payment request has been approved and processed, the amount will be removed from the “Pending Payment” area and reflected in the “Available Balance” area
7) If the subject has opted to receive email and/or text messages, the Subject will receive a payment confirmation communication when the payment is approved and has been loaded to the card.

How to Setup an Appointment Reminder

Once you have selected an existing Subject or registered a new Subject, 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 on the “Schedule Appointment” button and a pop-up menu will appear
2) Using the dropdowns, enter the correct date and time of the Subject’s next appointment
3) Click on the “Schedule” button
4) The appointment has been stored and will appear at the bottom of the “Subject Information” screen under the header “Appointments”
5) If the subject has opted to receive email and/or text messages, the subject will receive a reminder communication 3 days and 1 day prior to the subject’s next appointment

How to Request Assistance

If you have questions or comments about using the www.clincard.com Admin Portal, you may reach the ClinCard site support team by:

1) Submitting an email request through the “Support” link within the www.clincard.com website
2) Directly emailing us at support@greenphire.com
3) Calling our site support team directly at 215-609-4378 between the hours of 8:00AM and 10:00PM Eastern Time (Monday through Friday) in order to speak with a ClinCard team member
Frequently Asked Questions

Q: How is the ClinCard used by patients?

A patient can use their ClinCard for:

1. **In-Store Purchases**, selecting either “Credit” or “Debit” (“Debit” option requires PIN)
   - Using the “Debit” option will allow patients to select “cash back” option
2. **Online Purchases**
3. **Cash Withdrawals at ATMs** (requires PIN)
4. **Cash Advances at Banks**
   - Patient must know the available balance on the card and inform the teller of the amount they would like to withdraw. Tellers are unable to check your balance.
   - Patient presents the teller with their signed ClinCard and a valid government-issued photo ID
   - The ClinCard is accepted at all MasterCard member banks (look for a MasterCard logo on the bank window/entrance)

Q: Is there a fee for withdrawing amounts at an ATM?

If a patient would like the convenience of using the ClinCard at an ATM, they will be subject to fees which vary based on location.

However, there are alternate methods that a patient can get cash without incurring any fees: A) By presenting their ClinCard, along with a valid state ID, to a teller at a bank, or B) Selecting the “cash back” option when making an in-store “debit” purchase.

Q: Can the debit card be used as a credit card?

Yes. At the terminal a patient may press “credit,” which allows them to sign for the transaction rather than enter a PIN. However, some terminals will automatically request a PIN once a card has been swiped. In such cases, the patient should either press “cancel” to be able to sign or tell the cashier they want to sign for their transaction.

Q: How does a patient activate their ClinCard?

The ClinCard is active once the first payment is loaded. The patient will need to sign the back of their card and then can immediately begin using it by selecting the “credit” option in stores or online.

Q: How do I request more ClinCards?

Please send an e-mail request with Greenphire Card Request as the subject line to Grants Accounting at FA-grantsaccting@mail.ad.uab.edu. In the body of the e-mail, be sure to include the number of cards needed as well as the 9-digit org code for the department/division/center housing the study.
Q: How does a patient obtain their PIN?

The patient needs to call Customer Service at 1-866-952-3795 and follow the prompts through the IVR:

1) Press 1 for English or 2 for Spanish
2) Press 2 (to activate card & for account information)
3) Enter your 16-digit card number, followed by the “#” sign
4) Enter 3-digit security number (located on the back of card), followed by the “#” sign
5) Enter a 4-digit PIN of your choosing, followed by the “#” sign
6) Re-enter the same 4-digit PIN as confirmation, followed by the “#” sign

Q: What happens if a patient loses their ClinCard?

The patient should notify the site and the study coordinator will be able to replace it 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.

Q: What contact information is required to register a patient?

We require the following data fields be populated in order to register a patient and assign them a ClinCard:

- Subject ID
- Name
- Initials
- Address
- Date of Birth (DOB)
- Social Security Number

However, if a patient opts-in to receive messaging, which is not required, an email address and/or cell phone number will be required, depending on the method of contact they prefer. The patient can opt-out of messaging at any time, allowing the email address and/or cell phone number to be permanently deleted from the system.

All patient information is stored in a secure fashion and data is never shared with parties outside of Greenphire. Information collected is used when booking travel and by customer service in order to securely verify a patient’s identity when calling for assistance.

Q: What if a payment is made in error?

If a payment is made in error, immediately contact site support at support@greenphire.com or 215-609-4378, and Greenphire can void the payment and remove the funds from the ClinCard. However, if the funds have already been spent, there is no way to void the payment and remove the funds.

Q: What should I do with unused/unissued ClinCards?

If you have unused/unissued ClinCards, and have no other studies in your area that could use them, please return them to Grants Accounting, AB 990.