# Greenphire ClinCard Participant Payment Process for Site Coordinators Department Instructions Last Revision Date: 03/25/2022

AP contact information Phone: 252-737-5907 Email: <u>Participant Payments@ecu.edu</u> (underscore between Participant and Payments)

Greenphire has several different roles for system access and many reports available per user role.

Greenphire ClinCard Roles and Permissions				
Role/Permission Set	Job Duties	Report Access	ECU area that handles this functionality	
ClinCard Administrator	Creates/edits studies, creates/edits milestone payments, creates/edits user access/permissions	All reports, all studies	Accounts Payable	
Approver	Approve variable/travel reimbursements	All reports except 1099's, study-level reporting only	Possible Department Manager	
Study/Site Coordinator	Registers participant, assigns Clincard, pay participant	(optional) All reports except 1099's, study- level reporting only	Possible Department Admin	
Reports Only (Finance)	Finance team who review reports and manages fundings of issuance account	All reports, all studies	REDE	

Greenphire ClinCard Reports and Role Access							
		Role Access					
Report	ClinCard Administrator	Approver	Study/Site Coordinator	Reports Only			
Program Balance	x			x			
Program Balance Detail	x			x			
Payments by Site	x			x			
Site Payment Detail	x			x			
Payments by Study	x	x	x	x			
Payments by Subject	x	x	x	x			
Payment Detail	x	x	x	x			
Declined Payments	х	x	x	x			
Subject Appointments	x	x	x	x			
Subject by Study	x	x	x	x			
Study Budget Report	x	x	x	x			
1099 Report	x			x			
User Management	x			x			
Card Inventory	x			x			

How to Login to the Greenphire ClinCard system.

- When access has been granted by Accounts Payable for an individual to use the Greenphire Clincard system, that individual will receive an email from Greenphire Clincard stating access has been granted along with the below link to log in. Individual will use his/her pirate ID and passphrase.
  - o <u>Greenphire Production Link</u>

How do I see if a study participant is already in the Greenphire Clincard system?

1. Click on Look up Subject



- 2. "All Studies" should be in Study box
- 3. Click SEARCH

Look Up Subject		
Study 2		
All Studies		~
Only Studies with registered cardholders are displayed.		
Name	Subject ID	Initials
Subject Email	Last 4 Digits of ClinCard	
SEARCH		

If study participant has their Greenphire ClinCard on hand, you can look them up via the last 4 digits of their card.

- 4. Be sure "ECU All Studies" is in Study box
- 5. Enter the last 4 digits of Greenphire ClinCard
- 6. Click SEARCH

Look Up Subject		
All Studies		•
Only Studies with registered cardholders are displayed.		
Name	Subject ID	Initials
Subject Email	Last 4 Digits of ClinCard	5
6 SEARCH	9312	X

All search results will be displayed. If your study participant is displayed in this list, you will want to edit this study participant to add your study.

7. Click on study participant's last name

Search Results 1 records found			
SEARCH:			
LAST NAME FIRST NAME LAST FOUR	LOCATION	STUDY	ID
Michael Jackson 9312	East Carolina University	testing by GP_IRB 18-001342	test-0002
		Testing for IRB 18-002502	test-0001

8. Edit Subject

ACKSON MICHAEL			
SUBJECT INFORMATION	AUDIT HISTORY		
Study Name testing by GP_IRB 18-001342 V		Recent Activity Changed Jackson Michael subject information	REPLACE CLINCARD REQUEST PAYMENT REQUEST REIMBURSEMENT
Subject ID test-0002 Participant Code  Card Balance Available: 0.00 USD	<b>Study status</b> Enrolled <b>Address</b> 3931 Lee Street Ayden, NC 28513 <b>Timezone</b> US/Eastern	Cardholder Jackson Michael has enrolled in study testing by GP_IRB 18-001342 as Subject ID test-0002 with status Enrolled Scheduled appointment for Jackson Michael on December 09, 2019 at 10:00 AM EST Assigned card X-9312 to Jackson	EDIT SUBJECT 8
Pending Payments 231.09 USD Card Number XXXX-XXXX-XXX-9312 Expiration Date 31-DEC-2021	Home Phone  Allow Email No	Michael Replaced card X-9221 with card X-9312 for Jackson Michael VIEW ALL	

9. Click on 'Add Study'

Edit Subject Information		
Study Membership for East Carolina University		
Study*	Subject ID*	Subject Status*
Testing for IRB 18-002502	test-0001	Enrolled 🗸
Study*	Subject ID*	Subject Status*
testing by GP_IRB 18-001342	test-0002	Enrolled 🗸
+ ADD STUDY 9		

10. Click on 'Select Study' drop down box and click on study to be added

# Edit Subject Information

#### Study Membership for East Carolina University

Study*	Subject ID*	Subject Status*
Testing for IRB 18-002502	test-0001	Enrolled 🗸
Study*	Subject ID*	Subject Status*
testing by GP_IRB 18-001342	test-0002	Enrolled 🗸
Study*	Subject ID*	Subject Status*
Select Study 10 🔹		Enrolled 🗸

## 11. Enter unique subject ID

Edit Subject Information			
Study Membership for East Carolina University			
Study*		Subject ID*	Subject Status*
Testing for IRB 18-002502	•	test-0001	Enrolled 🗸
Study*		Subject ID*	Subject Status*
testing by GP_IRB 18-001342	•	test-0002	Enrolled 🗸
Study*		Subject ID*	Subject Status*
ECU All Studies	•	test-0003 ×	Enrolled 🗸

Make any updates to name, address or personal information and click 'Save'.

12. New Study Name will appear in Subject Information screen.

JACKSON MICHAEL			
SUBJECT INFORMATION	AUDIT HISTORY		
22 ECU All Studies Subject ID test-0003 Participant Code  Card Balance Available: 0.00 USD Pending Payments 231.09 USD Card Number XXXX-XXXX-9312 Expiration Date 31-DEC-2021	Study status Enrolled Address 3931 Lee Street Ayden, NC 28513 Timezone America/New_York Home Phone  Allow Email No	Recent Activity Changed Jackson Michael subject information Cardholder Jackson Michael has enrolled in study ECU All Studies as Subject ID test-ooo3 with status Enrolled Changed Jackson Michael subject information Cardholder Jackson Michael has enrolled in study testing by GP_IRB 18-001342 as Subject ID test-ooo2 with status Enrolled Scheduled appointment for Jackson Michael on December og, 2019 at 10:00 AM EST VIEW ALL	REPLACE CLINCARD REQUEST PAYMENT REQUEST REIMBURSEMENT EDIT SUBJECT SCHEDULE APPOINTMENT

If my participant is not already in the Greenphire Clincard system, how do I register a new study participant?

- 1. Click on Register Subject
- 2. Select 'ECU All Studies' from drop down box and hit enter

REGISTER SUBJECT	LOOK UP SUBJECT	ADMIN	REPORTS	SUPPORT	
1 Subje	1 Subject Registration				
To begin the registration process, please select a study *					
Select Study					

- 3. Study Status: Be sure Enrolled is populated. If not, click on Enrolled
- 4. Subject ID: Enter participant unique ID (this identifies participant without use of their name)
- 5. Site: East Carolina University ClinCard should be populated

Subject Reg	gistration	
To begin the registration process, ple	ease select a study*	
ECU All Studies	·	
Study Status* Subject ID*	4 Site* 5	
Enrolled 🗸	East Carolina University	~

- 6. Name: Enter participant name (first and last are required fields). Enter TIN if applicable
- 7. Country: United Stated should be populated
- 8. Address: Enter participant address
- 9. DOB: Enter participant date of birth
- 10. Email: Enter participant email address (required for travel or messaging)
  - a. Click "Enable Email Alerts" if participant wants to receive emails regarding payment confirmations or appointment reminders
- 11. Cell phone: Enter participant cell phone number (required for messaging)
  - a. Click "Enable Text Messaging" if participant wants to receive text messages regarding payment confirmations or appointment reminders
- 12. Click REGISTER
  - a. You will be brought to the "Subject Information" screen where you can add your specific study to this participant.

Name	
First Name*	Middle Last Name* Initials
6	
Address	
Country*	Search for an address*
United States	7 V Begin typing to find and address 8
Timezone* America/Eastern	Language ► English ►
Date Of Birth*	Subject Email Address
ex: 31-OCT-1952 9	ex: name@example.com 10  Enable Email Alerts
Subject Home Phone	Subject Cell Phone
eX: 215-555-1212	ex: 215-555-1212 Enable Text Messaging
12 REGISTER	

Now that participant is in 'ECU All Studies', the participant needs to be linked directly to your study. To do this:

13. Click Edit Subject under participant's Subject Information screen.

CHRISTOPHER KRINGLE					
SUBJECT INFORMATION	AUDIT HISTORY				
Study Name ECU All Studies Subject ID test-0004 No card assigned.	Study status Enrolled Address 123 East 5th Street Greenville, NC 27858 Timezone US/Eastern Home Phone  Allow Email No	Recent Activity Cardholder Christopher Kringle has enrolled in study ECU All Studies with status Enrolled Created new subject Christopher Kringle	ASSIGN CLINCARD REQUEST PAYMENT REQUEST REIMBURSEMENT EDIT SUBJECT 3 SCHEDULE APPOINTMENT		

14. Click on 'Add Study'

Edit Subject Information			
Study Membership for East Carolina University		Subject ID*	Subject Status <b>*</b>
ECU All Studies	•	test-0004	Enrolled 🗸
+ ADD STUDY 14			

- 15. Click on drop down to select your study to add
- 16. Enter unique Subject ID

Edit Subject Information		
Study*	Subject ID*	Subject Status*
ECU All Studies	▼ test-0004	Enrolled 🗸
Study* Select Study	5 The subject ID*	Subject Status*

EC

Make any updates to name, address or personal information and click 'Save'.

How do I assign a Greenphire ClinCard to a participant?

Once you have selected an existing participant or registered a new participant, you will be brought to the "Subject Information" screen. <u>(Be sure the Study Name is the study you want to pay from, NOT ECU All Studies</u>).

1. Click Assign ClinCard on right side of screen

JACKSON MICHAEL					
SUBJECT INFORMATION	ORY				
Study Name Testing for IRB 18-002502 Subject ID test-0001 No card assigned. Tim Ame Hor 	dy status biled iress ezone erica/New_York ne Phone w Email	Recent Acti Cardholder J Michael has a study Testing 18-002502 w Enrolled Created new Jackson Mich	ivity Jackson enrolled in g for IRB iith status r subject hael	ASSIGN CLINCARD REQUEST PAYMENT REQUEST REIMBURSEMENT EDIT SUBJECT SCHEDULE APPOINTMENT	

2. Enter 12-digit token number visible through window of one of the Greenphire ClinCard packets

1

ClinCard Program P.O. BOX 60473 KING OF PRUSSIA, PA 19406 REFURN SERVICE REQUESTED	
9DWQPRZ1 0003 002871 0003 Program Name: EAST CAROLINA UNIVERSITY CLINCARD Token# 4196 9 321 Valued Cardholder Expiration Date: 07/22	

3. Click Assign

ľ

J	ACKSON MICHA	. CI			l
ľ	SUBJECT INFORMATIO	Assign Card		x	
	Study Name Testing for IRB 18-00250 Subject ID test-0001 No card assigned.	None Assigned New Card*  41969221  ASSIGN  CANCEL	×		ASSIGN CLINCARD REQUEST PAYMENT REQUEST REIMBURSEMENT EDIT SUBJECT SCHEDULE APPOINTMENT
		America/New_York Home Phone  Allow Email No			

The Subject Information screen for your participant has been updated with the assigned card information.

- 4. Shows available card balance
- 5. Shows any pending payments
- 6. Shows last four digits of debit card
- 7. Shows expiration date of debit card
- 8. Stated debit card with the last 4 digits has been assigned to participant (#6 and #8 should match)
- 9. Assign ClinCard has been replaced with Replace ClinCard for this participant.
  - a. If your study chooses to do so, a lost card can be replaced by clicking 'Replace ClinCard', and following the steps above, using a token number from a new Greenphire ClinCard card packet. (See section of replacing a lost Greenphire ClinCard for additional information)

(Note: The 'Replace ClinCard' process will immediately inactivate the lost card and automatically transfer any available/pending balance to the newly assigned Greenphire ClinCard.)

JACKSON MICHAEL						
SUBJECT INFORMATION	AUDIT HIST	TORY				
Study Name Testing for IRB 18-00250 Subject ID test-0001 Card Balance 3 Available: 0.00 USD Pending Payments 5 0.00 USD Card Number XXX-XXXX-9221 Expiration Date 7 31-DEC-2021	2 Study status Enrolled Address Timezone America/New_York Home Phone  Allow Email No	Recent Activity Assigned card X-9221 to Jackson Michael Cardholder Jackson Michael has enrolled in study Testing for IRB 18-002502 with status Enrolled Created new subject Jackson Michael	REPLACE CLINCARD 9 REQUEST PAYMENT REQUEST REIMBURSEMENT EDIT SUBJECT SCHEDULE APPOINTMENT			

Now that the study participant is in the Greenphire Clincard system, you can pay the individual via a milestone payment or a reimbursement payment.

Quick note about payment approvals: The Study Voucher Authorization Form that was completed and approved serves as the initial approval of the participant payment. The Site Coordinator's payment process serves as the second approval of the participant payment. The Approver role in Greenphire is not required for participant to receive their payment. This role acts as a verification of Site Coordinator participant payment.

How do I make a milestone payment?

1. At Subject Information screen for specific participant, click on 'Request Payment'.



2. Click on drop down box under Milestone

< Return to search resu	Request Payn	nent			x	
JACKSO	То			Total Payment		
SUBJECT	Jackson Mich	ael		0.00		
	Study					
<b>a</b> . 1 N	Testing for IR	B 18-002502		Notes		RD
Testing fo	Milestone:*		2			NT
Subject ID	SELECT MIL	ESTONE	~			г
test-00						
<b>Card Balan</b> Availabl			N/A	CANCEL	Ì	INTMENT
Pending Pa		No. No.				
o.oo USD	Ai	merica/New_York				
Card Number	н 	ome Phone				

3. A list of Milestone payments will appear. Click on the appropriate payment amount. The Request Payment screen will populate with the amount of payment. Confirm it is correct and click Pay.

< Return to search resu	Request Payment		x
JACKSO	To Jackson Michael	Total Payment 100.00 USD	
Study Nam Testing fo	Study Testing for IRB 18-002502 Milestone:*	Notes	ARD ENT
Subject ID test-00 Card Balan Availabl	Clinic Visit C1D1-Blood Samples: 100.00 USE V PAY MISSED N/A	CANCEL	T
Pending Pa 0.00 US[	) America/New_York		

Once the payment has successfully been requested, the "Pending Payments" are of the "Subject Information" screen will reflect the payment. It will also be reflected in your "Recent Activity" in the middle of the screen.

Once a payment request has been approved, the amount will be removed from the "Pending Payments" area and will now be reflected in the "Card Balance" area.

If the subject has opted to receive email and/or text messages, the Subject will receive a payment confirmation communication.



## How do I make a manual payment?

1. Click on Request Reimbursement on right side of screen

JACKSON MICHAEL			
SUBJECT INFORMATION	AUDIT HISTORY		
Study Name Testing for IRB 18-002502 Subject ID test-0001 Card Balance (*) Available: 0.00 USD Pending Payments 100.00 USD Card Number XXXX-XXXX-9221 Expiration Date 31-DEC-2021	Study status Enrolled Address 3931 Lee Street Ayden, NC 28513 Timezone America/New_York Home Phone ~ Allow Email No	Recent Activity Preset Payment Option "Clinic Visit C1D-Blood Samples: 100.00USD" was marked pay Assigned card X-9221 to Jackson Michael Cardholder Jackson Michael has enrolled in study Testing for IRB 18-002502 with status Enrolled Created new subject Jackson Michael	REPLACE CLINCARD REQUEST PAYMENT REQUEST REIMBURSEMENT EDIT SUBJECT SCHEDULE APPOINTMENT

- 2. Be sure applicable study is showing up in first block. If not, click on down arrow and click on appropriate study.
- 3. Click on "Select a Reimbursement Type" down arrow
  - a. Drive/Mileage or Other Reimbursement will appear

Request Reimbursement		x
Reimbursement request for Jackson Michael		
Testing for IRB 18-002502	Select a Reimbursement Type	
To add	d a reimbursement request, complete the fields listed above.	
SUBMIT REQUEST CANCEL		

If Drive/Mileage is selected, the following screen will appear. Enter the following:

- a. Starting address
- b. Ending address
- c. Travel date
- d. Round trip, if applicable
- e. Add Notes enter the purpose of the mileage (ex: site visit, milestone #x)
- f. Click 'Add Request'

The Greenphire Clincard system will automatically calculate the estimate travel distance via Google maps.

Reimbursement request for Jackson Micha	el	
Testing for IRB 18-002502	✓ Drive/Mileage ✓	
Please note: Be sure to remove any inf	ormation from the Notes field that may reveal the i	dentity of the study participant.
Starting Address	Ending Address b Country*	Travel Date
United States	United States	05-Dec-2019
Search for an address (Default is home address)	Search for an address (Default is site address)	
3931 Lee Street Ayden North Carolina	120 Reade Street Greenville North Carolina	Round Trip
3931 Lee Street Ayden, NC 28513 USA	The address provided does not directly match with the Google-verified location. The address below will be used.	Notes* e notes
	Reade Street 120 120 Reade St, Greenville, NC 27858 USA	
The estimated travel distance is 20.3	miles  v round trip	
ADD REQUEST CANCEL		

4. The following screen will appear showing the mileage calculation. To accept, click 'Submit Request'.

quest Reimbu	rsement					X
Reimbursement	request for Jackson Michael					
Testing for IRB	• 18-002502 V	Select a Rein	nbursement Type	~		
DRIVE/MILEAG	ε				6.09 USD 🛍	
<b>Start Address:</b> 3931 Lee Street Ayden, NC 28513 USA	<b>End Address:</b> Reade Street 120 120 Reade St, Greenville, NC 27858 USA	<b>Total Distance:</b> 20.3 miles Roundtrip: Yes	Appointment Date: 05-DEC-2019	Notes: notes		
SUBMIT REQU	IEST CANCEL				TOTAL 6.09 USE	)

The amount of pending payments will increase by the amount of mileage reimbursement.

JACKSON MICHAEL			
SUBJECT INFORMATION	AUDIT HISTORY		
Study NameTesting for IRB 18-002502Subject IDtest-0001Card Balance IAvailable: 0.00 USDPending Payments106.09 USDCard NumberXXXXXXXXXX9221Expiration Date31-DEC-2021	Study status Enrolled Address 3931 Lee Street Ayden, NC 28513 Timezone America/New_York Home Phone - Allow Email No	Recent Activity Preset Payment Option "Clinic Visit C1D1-Blood Samples: 100.00USD" was marked pay Assigned card X-9221 to Jackson Michael Cardholder Jackson Michael has enrolled in study Testing for IRB 18-002502 with status Enrolled Created new subject Jackson Michael	REPLACE CLINCARD REQUEST PAYMENT REQUEST REIMBURSEMENT EDIT SUBJECT SCHEDULE APPOINTMENT

If Other Reimbursement is selected, the following screen will appear. Enter the following:

- a. Enter amount of reimbursement
- b. Enter Notes what is purpose of reimbursement (ex: airline, hotel, parking)
- c. Upload receipt, if applicable. Receipts should be retained in department for audit purposes.
- d. Click 'Receipt received but unable to be uploaded'. Receipt should be retained in department for audit purposes.
  - a. Either 'c' or 'd' should be checked. If 'd' is **NOT** checked, do not process reimbursement without uploading receipt.
- e. Click 'Add Request'

Request Reimbursement		x
Reimbursement request for Jackson Michael Testing for IRB 18-002502 V	Other Reimbursement	
Please note: When uploading a receipt, b Amount*	be sure to remove any information that may identify study participants.	
e	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.       Image: Content of the system.         Image: Receipt received but unable to be uploaded       Image: Content of the system.       Image: Content of the system.	
ADD REQUEST CANCEL		

5. The following screen will appear showing the amount of reimbursement. To accept, click 'Submit Request'.

Request Reimbursement					2
Reimbursement request for Jackson Mi	chael				
Testing for IRB 18-002502	$\sim$	Select a Reimbursement Type	~		
OTHER REIMBURSEMENT					125.00 USD 🛍
Notes: notes					
5					
SUBMIT REQUEST CANCEL				TOTAL	125.00 USD
iration Date					

The amount of pending payments will increase by the amount of other reimbursement.

JACKSON MICHAEL			
SUBJECT INFORMATION	AUDIT HISTORY		
Study Name Testing for IRB 18-002502 Subject ID test-0001 Card Balance () Available: 0.00 USD Pending Payments 231.09 USD Card Number XXXX-XXXX-XXXX-9221 Expiration Date 31-DEC-2021	Study status Enrolled Address 3931 Lee Street Ayden, NC 28513 Timezone America/New_York Home Phone  Allow Email No	Recent Activity Preset Payment Option "Clinic Visit C1D1-Blood Samples: 10.00USD" was marked pay Assigned card X-9221 to Jackson Michael Cardholder Jackson Michael has enrolled in study Testing for IRB 18-002502 with status Enrolled Created new subject Jackson Michael	REPLACE CLINCARD REQUEST PAYMENT REQUEST REIMBURSEMENT EDIT SUBJECT SCHEDULE APPOINTMENT

Replacing a Greenphire ClinCard

There are two options when replacing a ClinCard – (1) the study can replace the Greenphire ClinCard at a cost of \$3.70 to the study or (2) the subject/participant can call Greenphire Customer Service at 1-866-952-3795 at a cost of \$7.00 to the subject/participant. Subject/participant will need to provide their name, DOB and address for verification. The existing balance on old card will be transferred to new card. Greenphire customer service will mail a new debit card to subject/participant which may take 7-10 days.

Below is how to process Option 1:

1. Click on 'Replace ClinCard' on right side of screen

JACKSON MICHAEL			
SUBJECT INFORMATION	AUDIT HISTORY		
<b>Study Name</b> Testing for IRB 18-002502		<b>Recent Activity</b> Preset Payment Option "Clinic Visit C1D1-Blood Samples:	REPLACE CLINCARD
Subject ID test-0001 Card Balance () Available: 0.00 USD	<b>Study status</b> Enrolled <b>Address</b> 3931 Lee Street Ayden, NC 28513	100.00USD" was marked pay Assigned card X-9221 to Jackson Michael Cardholder Jackson Michael has enrolled in study Testing for IRB 18-005020 with study Testing for IRB	REQUEST REIMBURSEMENT EDIT SUBJECT SCHEDULE APPOINTMENT
Pending Payments 231.09 USD Card Number	Timezone America/New_York Home Phone 	Created new subject Jackson Michael	
Expiration Date 31-DEC-2021	<b>Allow Email</b> No		

2. Enter the token number for new card

# 3. Click 'Replace'

JACKSON MICHAEL	Replace Card X	
SUBJECT INFORMATION	Current Card	
<b>Study Name</b> Testing for IRB 18-002502	New Card* 2	REPLACE CLINCARD REQUEST PAYMENT
Subject ID test-0001 Card Balance <b>()</b> Available: 0.00 USD	Study : Enrollec Addres 3931 Let Ayden, Inc 20015 18-002502 with status Enrolled	REQUEST REIMBURSEMENT EDIT SUBJECT SCHEDULE APPOINTMENT
Pending Payments 231.09 USD	Timezone         Created new subject Jackson           America/New_York         Michael	
Card Number X000X-000X-000X-9221 Expiration Date 31-DEC-2021	Home Phone  Allow Email No	

The recent activity will show the replaced card. Any balance from the former card will be forwarded to the replaced card.

JACKSON MICHAEL			
SUBJECT INFORMATION	AUDIT HISTORY		
<b>Study Name</b> Testing for IRB 18-002502		<b>Recent Activity</b> Assigned card X-9312 to Jackson Michael	REPLACE CLINCARD REQUEST PAYMENT REQUEST REIMBURSEMENT
Subject ID test-0001	Study status Enrolled	Replaced card X-9221 with card X-9312 for Jackson Michael	EDIT SUBJECT
Card Balance <b>9</b> Available: 0.00 USD	Address 3931 Lee Street Ayden, NC 28513	Preset Payment Option "Clinic Visit C1D1-Blood Samples: 100.00USD" was marked pay	SCHEDULE APPOINTMENT
Pending Payments 231.09 USD	<b>Timezone</b> America/New_York	Assigned card X-9221 to Jackson Michael Cardholder Jackson Michael has	
Card Number XXXX-XXXX-XXX-9312	Home Phone	enrolled in study Testing for IRB 18-002502 with status Enrolled	
Expiration Date 31-DEC-2021	<b>Allow Email</b> No	VIEW ALL	

Editing an existing subject/participant

1. Click on 'Edit Subject' on right side of screen

JACKSON MICHAEL			
SUBJECT INFORMATION	AUDIT HISTORY		
Study Name Testing for IRB 18-002502 Subject ID test-0001 Card Balance () Available: 0.00 USD Pending Payments 231.09 USD Card Number XXXX-XXXX-XXXX-9221 Expiration Date 31-DEC-2021	Study status Enrolled Address 3931 Lee Street Ayden, NC 28513 Timezone America/New_York Home Phone  Allow Email No	Recent Activity Assigned card X-9312 to Jackson Michael Replaced card X-9321 with card X-9312 for Jackson Michael Yeist C1D-Blood Samples: 100.00USD" was marked pay Assigned card X-9221 to Jackson Michael Cardholder Jackson Michael has enrolled in study Testing for IRB 18-002502 with status Enrolled	REPLACE CLINCARD REQUEST PAYMENT REQUEST REIMBURSEMENT EDIT SUBJECT SCHEDULE APPOINTMENT

The 'Edit Subject Information' screen will appear which allows the Site Coordinator to modify and existing subject/participant (name, address or personal information). Click 'Save' to save changes.

# Schedule an Appointment

1. Click 'Schedule Appointment' on right side of screen

CKSON MICHAEL			
SUBJECT INFORMATION	AUDIT HISTORY		
<b>Study Name</b> Testing for IRB 18-002502		Recent Activity Assigned card X-9312 to Jackson Michael	REPLACE CLINCARD REQUEST PAYMENT
Subject ID test-0001 Card Balance () Available: 0.00 USD Pending Payments	<b>Study status</b> Enrolled <b>Address</b> 3931 Lee Street Ayden, NC 28513 <b>Timezone</b>	Replaced card X-9221 with card X-9312 for Jackson Michael Preset Payment Option "Clinic Visit C1D1-Blood Samples: 100.00USD" was marked pay Assigned card X-9221 to Jackson Michael	EDIT SUBJECT SCHEDULE APPOINTMENT
231.09 USD Card Number XXXX-XXXX-9312 Expiration Date 31-DEC-2021	America/New_York Home Phone  Allow Email No	Cardholder Jackson Michael has enrolled in study Testing for IRB 18-002502 with status Enrolled VIEW ALL	

- 2. Enter Appointment Date
- 3. Enter Appointment Time
- 4. Click 'Schedule'

JACKSON MICHAEL	Schedule Appointment	x	
SUBJECT INFORMATION	Schedule next appointment for Jackson Michael		
Study Name         Testing for IRB 18-002502         Subject ID       Statement         test-0001       Enitement         Card Balance ①       Add         Available: 0.00 USD       395         Available: 0.00 USD       Arr         231.09 USD       Arr         Card Number	Testing for IRB 18-002502 Appointment Date 09-Dec-2019 Appointment Time 10 0 AM V All times are as of the site's time zone: US/Eastern SCHEDULE CANCEL		REPLACE CLINCARD REQUEST PAYMENT REQUEST REIMBURSEMENT EDIT SUBJECT SCHEDULE APPOINTMENT

The appointment will appear at the bottom of the 'Subject Information' screen under the header 'Upcoming Appointments'.

SUBJECT INFORMATION	AUDIT HISTORY		
Study Name Testing for IRB 18-002502 Subject ID test-0001 Card Balance O Available: 0.00 USD Pending Payments 231.09 USD Card Number XXXXXXXXX9312 Expiration Date 31-DEC-2021	Study status Enrolled Address 3931 Lee Street Ayden, NC 28513 Timezone America/New_York Home Phone  Allow Email No	Recent Activity Assigned card X-9312 to Jackson Michael Replaced card X-9221 with card X-9312 for Jackson Michael Preset Payment Option "Clinic Visit C1D1-Blood Samples: 100.00USD" was marked pay Assigned card X-9221 to Jackson Michael Cardholder Jackson Michael has enrolled in study Testing for IRB 18-002502 with status Enrolled VEW ALL	REPLACE CLINCARD REQUEST PAYMENT REQUEST REIMBURSEMENT EDIT SUBJECT SCHEDULE APPOINTMENT
DATE DAY 09-DEC-2019 Monda	7 TIME 7 10:00 AM	STUDY SCHEDUL Testing for IRB 18-002502 Test2 User	2 CHANGE   CANCEL

If the subject/participant has opted to receive email and/or text messages, the subject/participant will receive a reminder communication 3 days and 1 day prior to the subject's next appointment.

## Subject/Participant Audit History

This tab will show all activity related to a subject/participant. All payments will appear first followed by all other activity.

SUBJECT IN	NFORMATION	AL	JDIT HISTORY			
ayment His	tory					
SUBMITTED	AMOUNT	STUDY	DESCRIPTION	STATUS 🕄	APPROVED	ACTIONS
05-DEC-2019 04:58 PM EST Test2 User2 (tuser230)	125.00 USD	Testing for IRB 18- 002502	Transaction #4958-2782F11843 Other Reimbursement Milestone: None Released Amount: 0.00 Notes: notes	Waiting for approval	N/A	
05-DEC-2019 04:52 PM EST Test2 User2 (tuser230)	6.09 USD	Testing for IRB 18- 002502	Transaction #4958-E82F6A56B3 Drive/Mileage Reimbursement Milestone: None Released Amount: 0.00 Notes: notes	Waiting for approval	N/A	
21-NOV-2019 03:38 PM EST Test2 User2 (tuser230)	100.00 USD	Testing for IRB 18- 002502	Transaction #4958-CE0DE6F198 Milestone: Clinic Visit C1D1-Blood Released Amount: 0.00 Notes: N/A	Waiting for I Samples approval	N/A	
Recent Activ	ity					

# Greenphire Clincard Reports

Access to Greenphire Clincard reports is based on the individual's role in the study. Below is a grid showing what reports are available to what roles in the Greenphire Clincard system.

Permission Set Name	In-Portal Permissions	Non-portal Activities	Report Access
ClinCard Administrator	Create studies and milestone payment schedules, edit studies, add users, manage user permissions	Order ClinCards, manage card inventory, provide training to new users, process batch registration or milestone payments (optional)	All reports, all studies
Approver (Department Manager)	Approve variable/travel reimbursements	Review/approve ClinCard access requests from interested departments, forward access requests to ClinCard Administrator for study/user creation	All reports except 1099, study-level reporting only
Study Coordinator (Research Coordinator or Principle Investigator)	Register subject, assign ClinCard, pay subject, void payments (optional), schedule appointment reminders (optional)	Request access to ClinCard internally, educate patients on use of ClinCard	(optional) All reports except 1099, study-level reporting only
Reports Only (Finance)	Reports	Manage funding of issuance account, (optional) bill fees back to studies depending on use of ClinCard	All reports, all studies

- 1. Reports can be accessed by click on the 'REPORTS' section in top green bar.
- 2. Click drop down arrow to select a report

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REGISTER SUBJECT	LOOK UP SUBJECT	PAYMENT APPROVALS	ADMIN	REPORTS	SUPPORT
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Select a report	- <b></b>		2		

- 3. Reports can be filtered by date.
- 4. Reports can be exported to excel.

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ECU All Studies	3	•			
Payments I	oy Subject 👩		-	4	EXCEL FILE 🛛 FULLSCREEN
SEARCH:	FILTER BY:	DATE RANGE			
SUBJECT ID	SITE NUMBER	SITE NAME	# PAYMENTS	TOTAL PAYMENTS	AVERAGE PAYMENT

#### Site Coordinator's FAQ's:

Q: When do I need to obtain a W9 (SSN)?

A: Two cases – (1) if paying participant \$100 or more in one study or (2) if paying participant for multiple studies, regardless of dollar amount of each payment.

- If a study is paying a participant \$100 or more, please complete and upload a Consent to Collect, Use and Disclose Social Security Number form in Team Dynamix when submitting set up study request.
- Q: Are non-resident aliens paid via Greenphire?

A: Non-resident aliens need to be reviewed on a case by case basis. Please contact AP for assistance at 252-737-5907 or <u>participant\_payments@ecu.edu</u>. (underscore between participant and payments)

Q: Can employees be research participants?

A: Yes

Q: How is the mileage total calculated for Drive Reimbursement?

A: Greenphire is configured with Google Maps, who sends a total based on its own calculations. These calculations cannot be overridden. Should their total not match what the participant drove, a "Manual" payment may be entered for the difference.

Q: How does the participant activate their Clincard?

A: The Clincard is active once the first payment is loaded. The participant 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: What if a payment is made in error?

A: If a payment is made in error, immediately call site support at <u>support@greenphire.com</u> or call toll free 844-847-0107. 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: Does collecting information from a minor work differently?

A: Reporting payment to a minor will be reporting for tax purposed as received by the minor. However, if the minor does not have a SSN, the payment will be reported under the parent/guardian's SSN.