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

AP contact information
Phone:  252-737-5907
Email:  Participant_Payments@ecu.edu (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 | x | 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.
  - Greenphire Production Link

How do I see if a study participant is already in the Greenphire Clincard system?
1. Click on Look up Subject
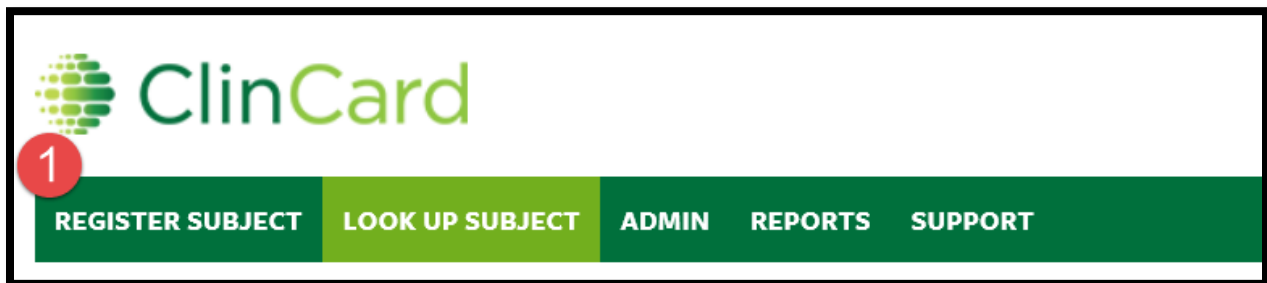


2. "All Studies" should be in Study box
3. Click SEARCH

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

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



    8.   Edit Subject

## JACKSON MICHAEL

| SUBJECT INFORMATION | AUDIT HISTORY |
|---|---|

**Study Name**
testing by GP_IRB 18-001342 ▼

**Subject ID**
test-0002

**Participant Code**
--

**Card Balance** ⓘ
Available: 0.00 USD

**Pending Payments**
231.09 USD

**Card Number**
XXXX-XXXX-XXXX-9312

**Expiration Date**
31-DEC-2021

**Study status**
Enrolled

**Address**
3931 Lee Street
Ayden, NC 28513

**Timezone**
US/Eastern

**Home Phone**
--

**Allow Email**
No

**Recent Activity**
Changed Jackson Michael subject information

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 Michael

Replaced card X-9221 with card X-9312 for Jackson Michael

VIEW ALL

**REPLACE CLINCARD**

**REQUEST PAYMENT**

**REQUEST REIMBURSEMENT**

**EDIT SUBJECT** 8

**SCHEDULE APPOINTMENT**

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 ▼ |
| 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

11. Enter unique subject ID



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

**Study Name** (12)
ECU All Studies ▾

**Subject ID**
test-0003

**Participant Code**
--

**Card Balance** ⓘ
Available: 0.00 USD

**Pending Payments**
231.09 USD

**Card Number**
XXXX-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-0003 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-0002 with status Enrolled

Scheduled appointment for Jackson Michael on December 09, 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



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

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 |



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**Address**

Country*

United States ⑦ ˅

Search for an address*

Begin typing to find and address ⑧

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**Personal**

Timezone*

America/Eastern ˅

Language

English ˅

Date Of Birth*

ex: 31-OCT-1952 ⑨

Subject Email Address

ex: name@example.com ⑩  ☐ Enable Email Alerts

Subject Home Phone

ex: 215-555-1212

Subject Cell Phone

ex: 215-555-1212 ⑪  ☐ 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** 13

**SCHEDULE APPOINTMENT**

14. Click on 'Add Study'

## Edit Subject Information

**Study Membership for East Carolina University**

| Study* | Subject ID* | Subject Status* |
| 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 Membership for East Carolina University**

| Study* | Subject ID* | Subject Status* |
| ECU All Studies | test-0004 | Enrolled |

| Study* | Subject ID* | Subject Status* |
| -- Select Study -- 15 | 16 | Enrolled |

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. **(Be sure the Study Name is the study you want to pay from, NOT ECU All Studies**).

1. Click Assign ClinCard on right side of screen



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



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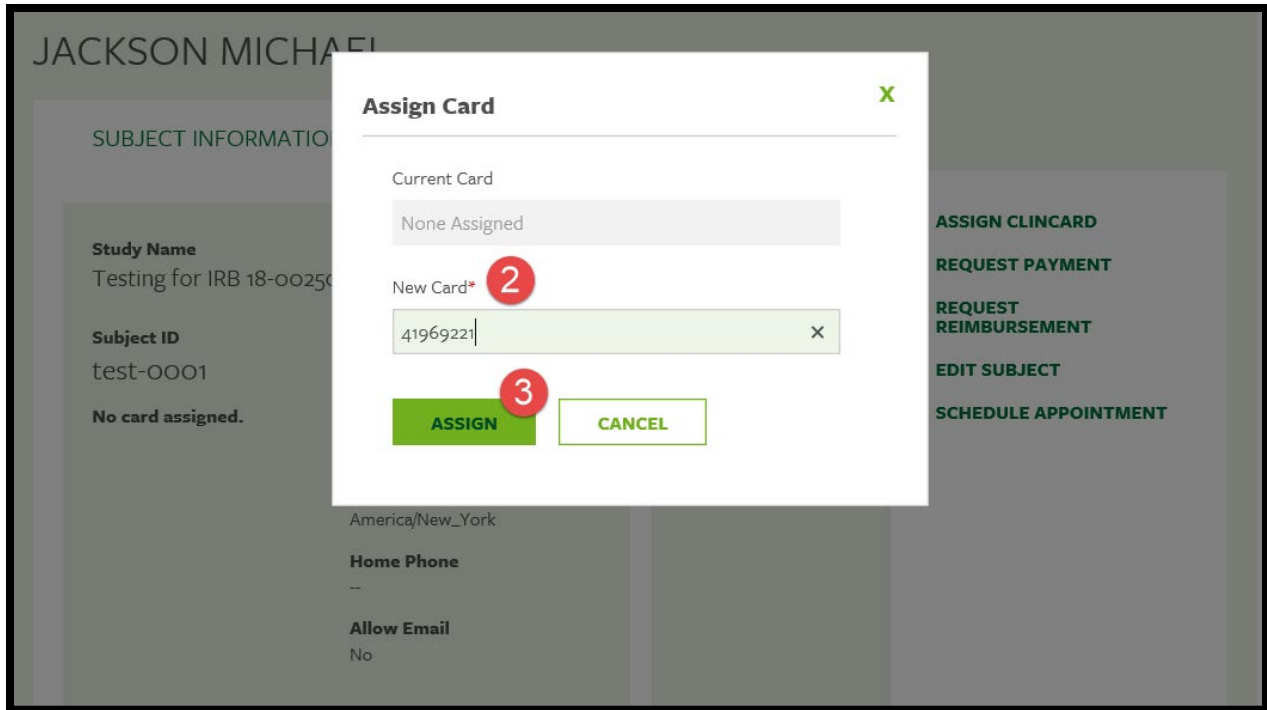
The Subject Information screen for your participant has been updated with the assigned card information.

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.)*

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



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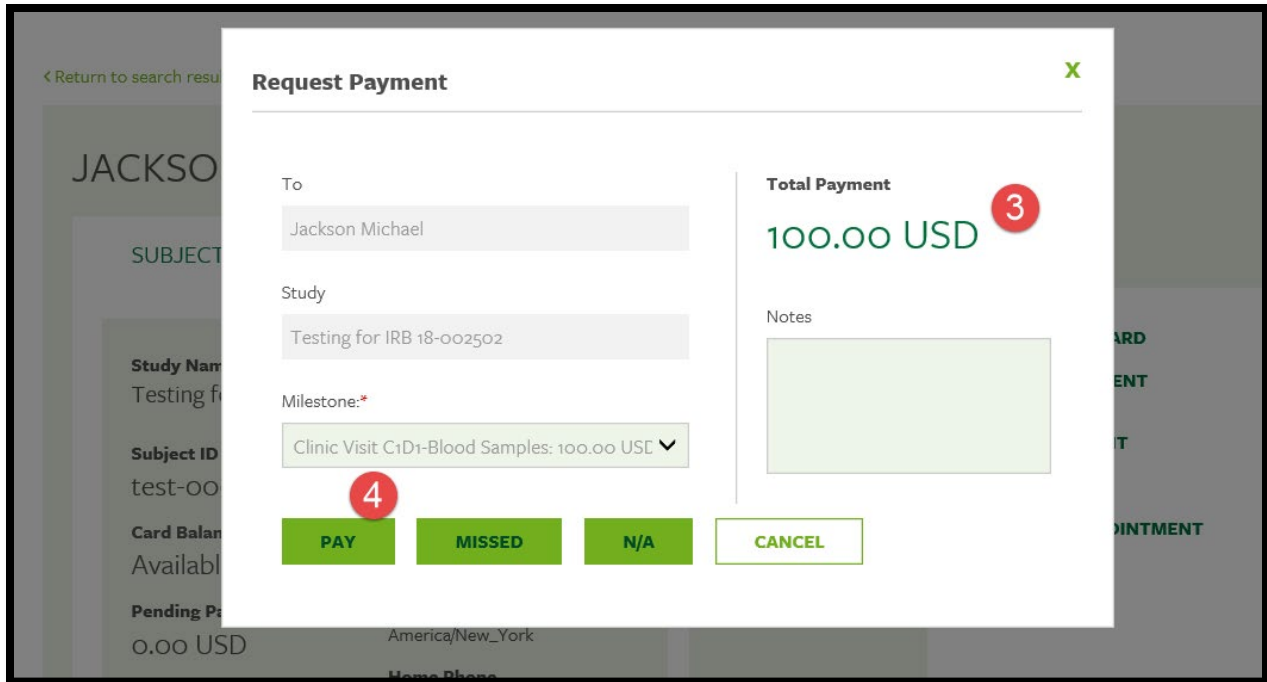
Once the payment has successfully been requested, the "Pending Payments" are of the "Subject Information" screen will reflect the payment.  It will also be reflected in your "Recent Activity" in the middle of the screen.

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



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

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 Michael

Testing for IRB 18-002502 ▾    Drive/Mileage ▾

**Please note:** Be sure to remove any information from the Notes field that may reveal the identity of the study participant.

**Starting Address** (a)
Country*
United States ▾

Search for an address (Default is home address)
3931 Lee Street Ayden North Carolina

3931 Lee Street
Ayden, NC 28513
USA

**Ending Address** (b)
Country*
United States ▾

Search for an address (Default is site address)
120 Reade Street Greenville North Carolina

The address provided does not directly match with the Google-verified location. The address below will be used.

Reade Street 120
120 Reade St, Greenville, NC 27858
USA

Travel Date (c)
05-Dec-2019

☑ Round Trip (d)

Notes* (e)
notes

The estimated travel distance is  20.3   miles ▾  round trip

(f)
ADD REQUEST    CANCEL

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



**Request Reimbursement**                                                X

Reimbursement request for Jackson Michael

Testing for IRB 18-002502 ▾    Select a Reimbursement Type ▾

DRIVE/MILEAGE                                                6.09 USD 🗑

| **Start Address:** | **End Address:** | **Total Distance:** | **Appointment Date:** | **Notes:** |
| 3931 Lee Street | Reade Street 120 | 20.3 miles | 05-DEC-2019 | notes |
| Ayden, NC 28513 | 120 Reade St, Greenville, NC 27858 | Roundtrip: Yes | | |
| USA | USA | | | |

(4)
SUBMIT REQUEST    CANCEL                          TOTAL    **6.09 USD**

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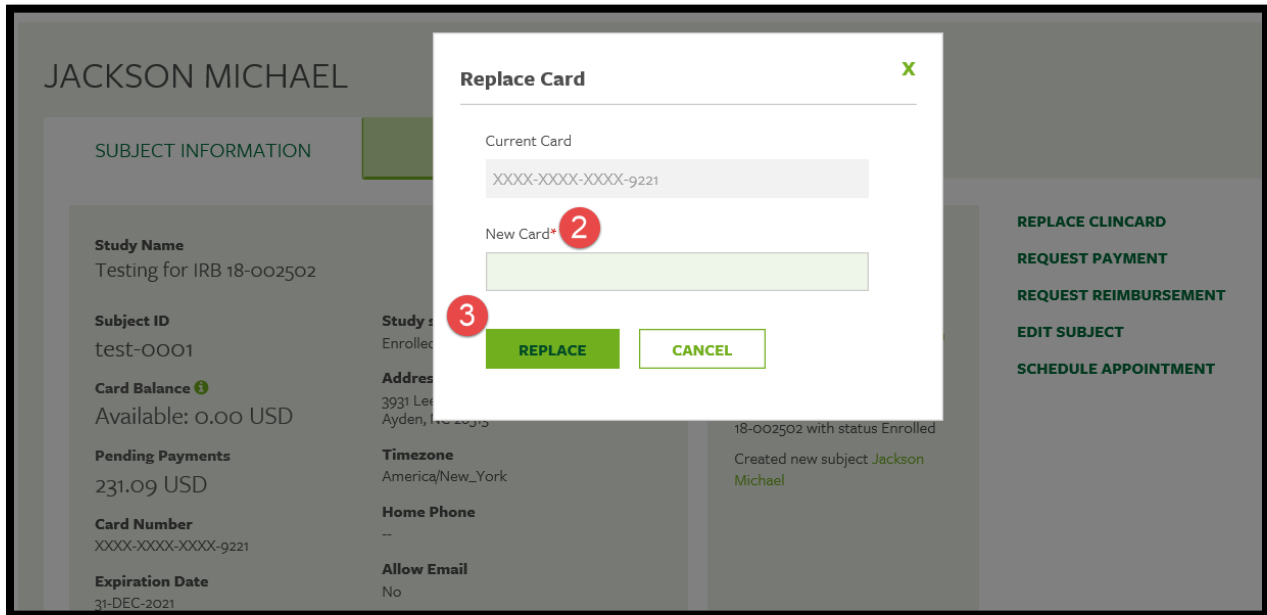
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JACKSON MICHAEL

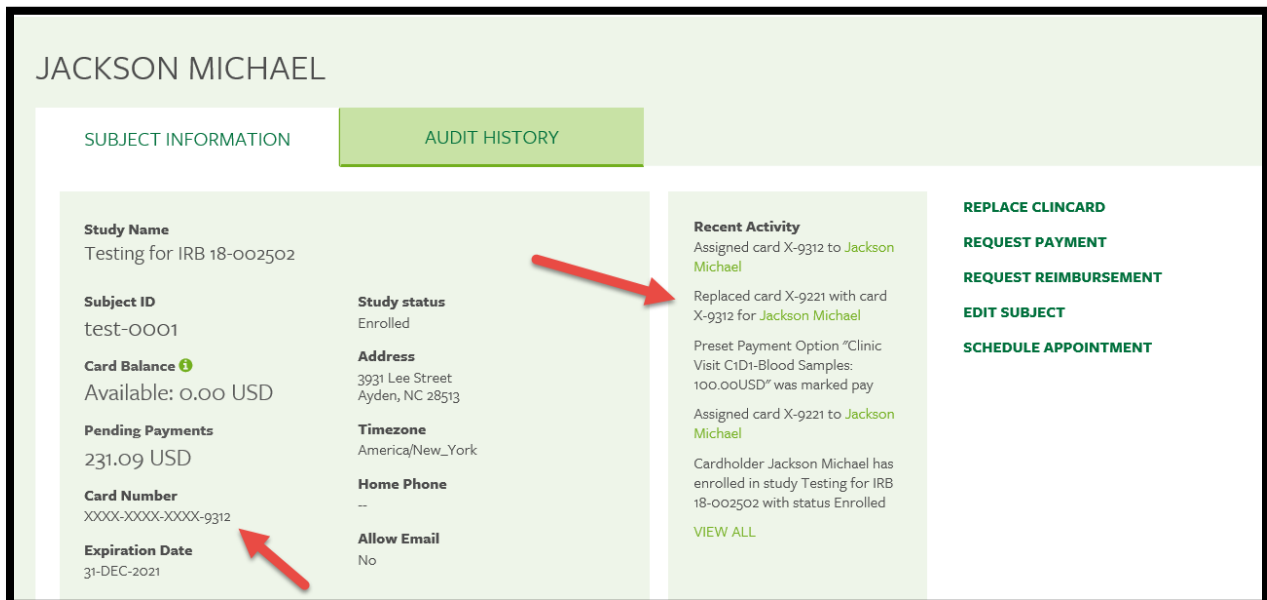SUBJECT INFORMATION     AUDIT HISTORY

**Study Name**
Testing for IRB 18-002502

**Subject ID**
test-0001

**Card Balance** ⓘ
Available: 0.00 USD

**Pending Payments**
106.09 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: 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'

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



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

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



2. Enter the token number for new card

3. Click 'Replace'



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



Editing an existing subject/participant
1. Click on 'Edit Subject' on right side of screen

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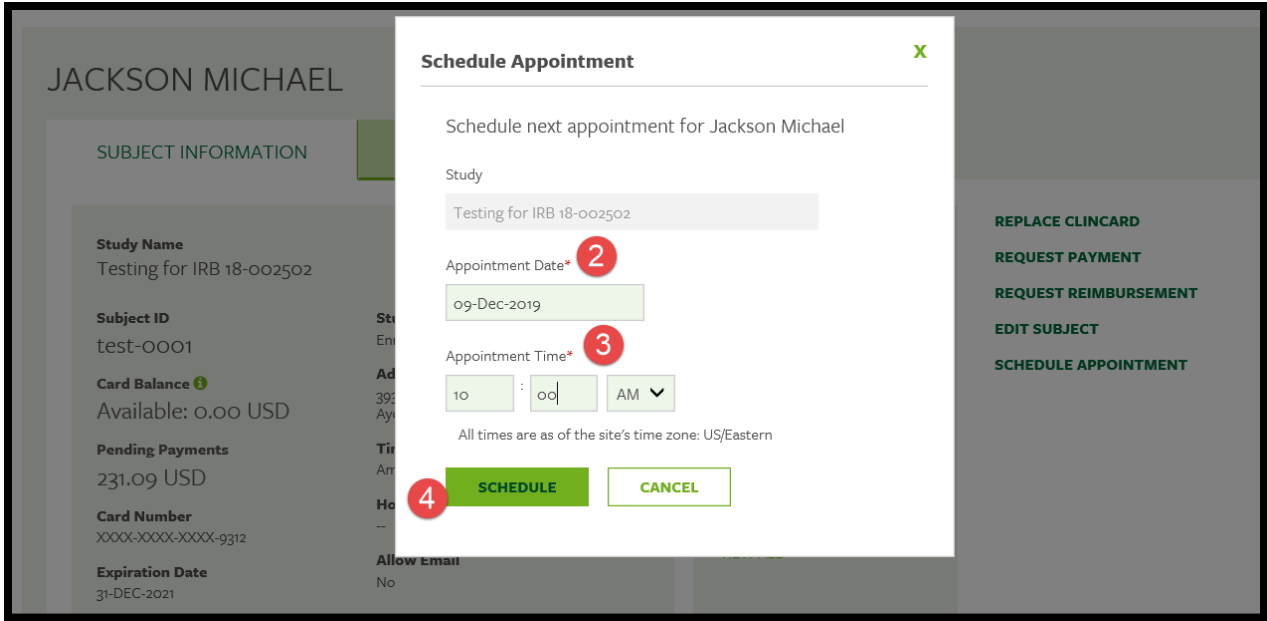
Schedule an Appointment
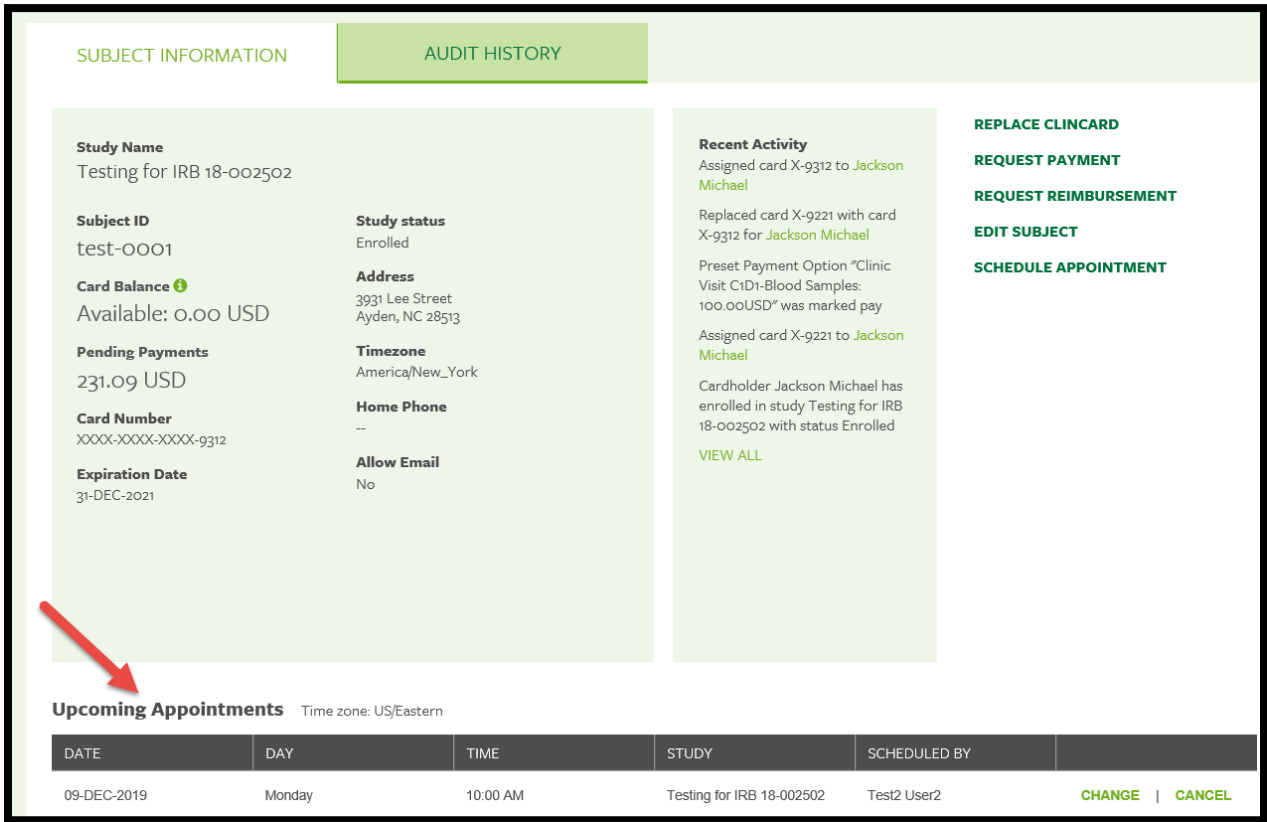1.  Click 'Schedule Appointment' on right side of screen



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

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



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.



## 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
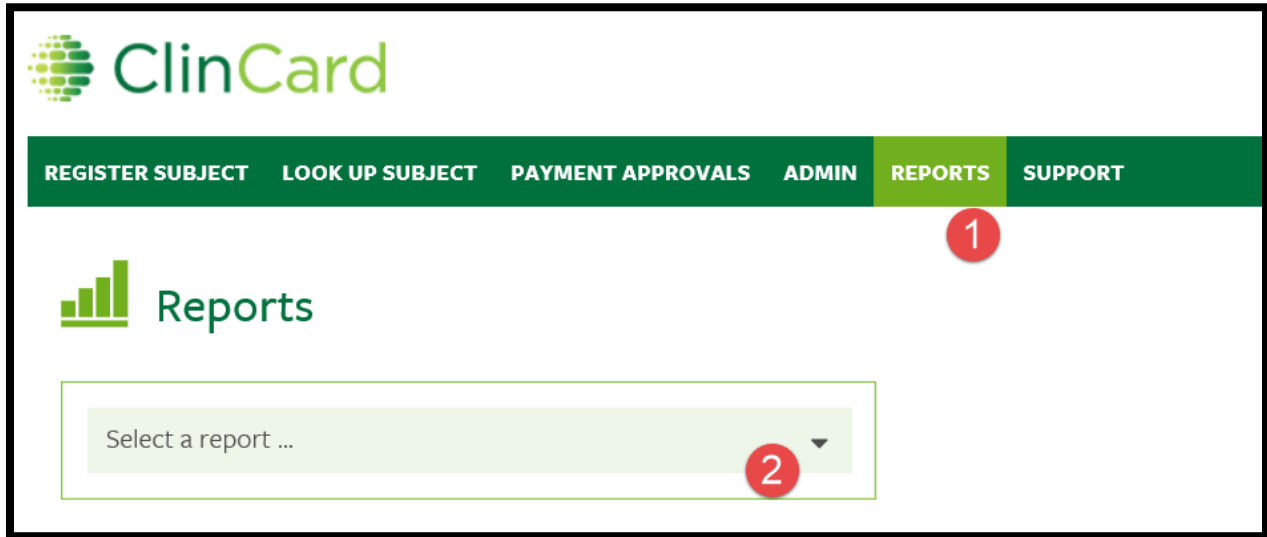


3. Reports can be filtered by date.
4. Reports can be exported to excel.
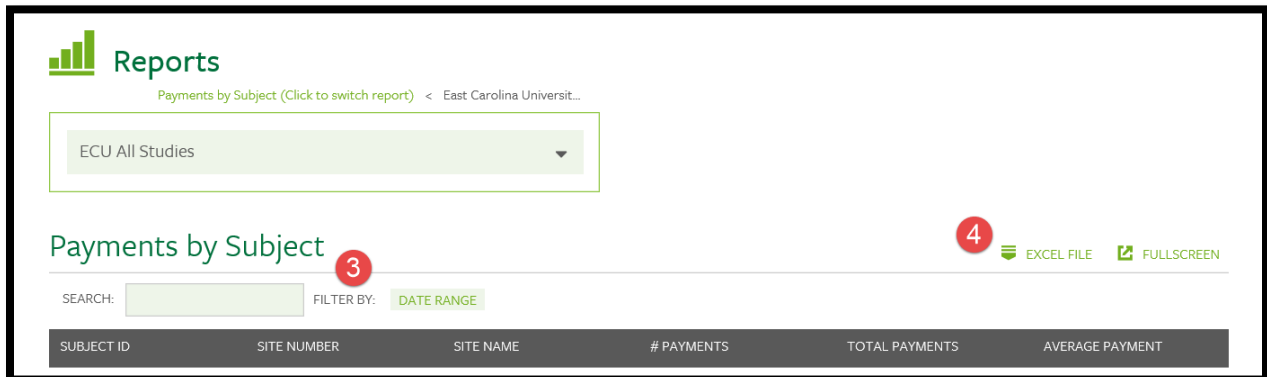


**Site Coordinator's FAQ's:**

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 participant_payments@ecu.edu. (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 [support@greenphire.com](mailto:support@greenphire.com) 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.