

You will need to collect the following information for each card recipient:

- Social Security Number
- First Name
- Last Name
- Address
- Date of Birth (used to verify identity if the card holders call Greenphire)

You can chose to utilize the IRS form W-9 to collect this data. If W-9's are collected, send them to Campus Box 38 Attn: Kristie Courtney once the recipient has been set up in the Greenphire system.

Register a Subject

1. Login to www.clincard.com.
2. Click the **Register Subject** tab.
3. Select the appropriate Study from the drop-down menu.
4. Enter the information into the form. Fields denoted with a red asterisk (*) are required.

REGISTER SUBJECT LOOK UP SUBJECT PAYMENT APPROVALS ADMIN REPORTS SUPPORT

Please note that Greenphire has moved offices from 630 Allendale Road Suite #250, King of Prussia PA 19406 to 1018 W. 9th Ave., Suite 200, King of Prussia, PA 19406 effective immediately.

Subject Registration

To begin the registration process, please select a study*

Study Status* Subject ID* Site*

Enrolled [] []

Name

First Name* Middle Last Name* Initials* Social Security Number*

[] [] [] [] []

Address

Country* Search for an address*

United States []

Personal

Timezone* Language

America/Eastern English

Date Of Birth* Subject Email Address Enable Email Alerts

ex: 31-OCT-1952 ex: name@example.com

Subject Cell Phone Enable Text Messaging

ex: 215-555-1212

REGISTER

*If you would like the Subject to receive payment confirmations or appointment reminders, select the “Enable Email Alerts” and “Enable Text Messaging” checkboxes.

5. Click **Register**.

6. You will be brought to the “Subject Information” screen where you can assign a card number, make a payment, replace a ClinCard or edit a Subject’s information.

The screenshot shows a web interface for a 'DEMO TESTER' subject. At the top, there are two tabs: 'SUBJECT INFORMATION' (highlighted in yellow) and 'AUDIT HISTORY'. The main content area is divided into three columns. The left column contains subject details: 'Study Name' (Demo Study), 'Subject ID' (789456), and 'No card assigned.'. The middle column contains contact and status information: 'Study status' (Enrolled), 'Address' (630 Allendale Road, King of Prussia, PA 19406), 'Timezone' (America/New_York), 'Home Phone' (---), 'Cell Phone' (2158551212), 'Allow Text Messages' (No), and 'Allow Email' (No). The right column contains a 'Recent Activity' log showing 'Cardholder Demo Tester has enrolled in study Demo Study with status Enrolled' and 'Created new subject Demo Tester'. To the right of the main content is a vertical yellow sidebar with a list of actions: 'ASSIGN CLINCARD', 'REQUEST PAYMENT', 'REQUEST REIMBURSEMENT', 'CREATE TRAVEL PROFILE', 'EDIT SUBJECT', and 'SCHEDULE APPOINTMENT'.

DEMO TESTER

SUBJECT INFORMATION **AUDIT HISTORY**

Study Name
Demo Study

Subject ID
789456

No card assigned.

Study status
Enrolled

Address
630 Allendale Road
King of Prussia, PA 19406

Timezone
America/New_York

Home Phone

Cell Phone
2158551212

Allow Text Messages
No

Allow Email
No

Recent Activity
Cardholder Demo Tester has enrolled in study Demo Study with status Enrolled
Created new subject Demo Tester

ASSIGN CLINCARD
REQUEST PAYMENT
REQUEST REIMBURSEMENT
CREATE TRAVEL PROFILE
EDIT SUBJECT
SCHEDULE APPOINTMENT

Assign a ClinCard

1. 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 the actions you can perform on the Subject.
2. Click **Assign ClinCard** and a pop-up screen will appear.

The screenshot shows the 'Subject Information' screen for a subject named 'DEMO TESTER'. The screen is divided into two tabs: 'SUBJECT INFORMATION' (selected) and 'AUDIT HISTORY'. The 'SUBJECT INFORMATION' tab displays the following details:

- Study Name:** Demo Study
- Subject ID:** 789456
- Recent Activity:** Cardholder Demo Tester has enrolled in study Demo Study with status Enrolled. Created new subject Demo Tester.
- Study status:** Enrolled
- Address:** 890 Allendale Road, King of Prussia, PA 19406
- Timezone:** America/New_York
- Home Phone:** --
- Cell Phone:** 2155551212
- Allow Text Messages:** No
- Allow Email:** No

On the right side of the screen, there is a vertical list of action buttons: **ASSIGN CLINCARD** (highlighted in yellow), **REQUEST PAYMENT**, **REQUEST REIMBURSEMENT**, **CREATE TRAVEL PROFILE**, **EDIT SUBJECT**, and **SCHEDULE APPOINTMENT**.

[Pop-up screen]

The screenshot shows the 'Assign ClinCard' pop-up screen. It has a title bar with 'Assign ClinCard' and a close button (X). The screen contains two input fields:

- Current Card:** A text field containing 'None Assigned'.
- New Card⁺:** An empty text field.

At the bottom of the screen, there are two buttons: **ASSIGN** (highlighted in yellow) and **CANCEL**.

3. In the “New Card” field, enter the token number visible through the window of the ClinCard card package.
 - a. Note: Do not open the envelope prior to providing to the Subject. The token number is different than the 16-digit card number.
4. Click **Assign**.
5. Once the card has successfully been assigned, you will receive a confirmation message at the top of the “Subject Information” screen.

The screenshot shows a success message in a yellow box with a black border. The message reads: **Success!** The new card has been successfully assigned to Demo Tester. The new card will be active within 10 minutes. There is a close button (X) in the top right corner of the box.

Request a Payment

1. Click **Request Payment** and pop-up screen will appear

DEMO TESTER

SUBJECT INFORMATION AUDIT HISTORY

Study Name
Demo Study

Subject ID
789456

No card assigned.

Study status
Enrolled

Address
690 Allendale Road
King of Prussia, PA 19406

Timezone
America/New_York

Home Phone
--

Cell Phone
2155551212

Allow Text Messages
No

Allow Email
No

Recent Activity
Cardholder Demo Tester has enrolled in study Demo Study with status Enrolled
Created new subject Demo Tester

ASSIGN CLINCARD
REQUEST PAYMENT
REQUEST REIMBURSEMENT
CREATE TRAVEL PROFILE
EDIT SUBJECT
SCHEDULE APPOINTMENT

[Pop-up screen]

Request Payment X

To
Demo Tester

Study
Demo Study

Milestone: +
Screening: 5,000 USD

Total Payment
5.00 USD

Notes

PAY MISSED N/A CANCEL

2. Select the milestone the subject is being paid.
3. Add any Notes (not required).
4. Click **Pay**.
 - a. When a payment has successfully been requested, the “Pending Payments” area of the “Subject Information” screen will reflect the payment. It will also be reflected in your “Recent Activity” in the middle of the screen.
 - b. When a payment has been approved and processed, the amount will be removed from the “Pending Payments” area and will now be reflected in the “Card Balance” area.

SUBJECT INFORMATION

AUDIT HISTORY

Study Name

Demo Study

Subject ID

789456

Card Balance ⓘ

Available: 0.00 USD

Pending Payments

0.00 USD

Card Number

XXXX-XXXX-XXXX-1703

Expiration Date

28-FEB-2018

Study status

Enrolled

Address

630 Allendale Road
King of Prussia, PA 19406

Timezone

America/New_York

Home Phone

--

Cell Phone

2155551212

Allow Text Messages

No

Allow Email

No

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

Make a Miscellaneous Payment

1. Click **Request Payment** and a pop-up screen will appear

The screenshot shows a user interface for a subject named 'DEMO TESTER'. At the top, there are two tabs: 'SUBJECT INFORMATION' and 'AUDIT HISTORY'. The 'SUBJECT INFORMATION' tab is active. Below the tabs, there are several sections:

- Study Name:** Demo Study
- Subject ID:** 789456
- No card assigned.**
- Study status:** Enrolled
- Address:** 890 Allendale Road, King of Prussia, PA 19406
- Timezone:** America/New_York
- Home Phone:** --
- Cell Phone:** 2155551212
- Allow Text Messages:** No
- Allow Email:** No

On the right side, there is a 'RECENT ACTIVITY' section and a list of actions:

- RECENT ACTIVITY:** Cardholder Demo Tester has enrolled in study Demo Study with status Enrolled. Created new subject Demo Tester.
- ACTION LIST:** ASSIGN CLINCARD, REQUEST PAYMENT (highlighted in yellow), REQUEST REIMBURSEMENT, CREATE TRAVEL PROFILE, EDIT SUBJECT, SCHEDULE APPOINTMENT.

[Pop-up screen]

The screenshot shows a 'Request Payment' pop-up screen. It has a title bar with a close button (X). The form contains the following fields and elements:

- To:** Demo Tester
- Study:** Demo Study
- Milestone:** A dropdown menu with 'Miscellaneous Payment' selected and highlighted in yellow.
- Amount:** A text input field containing '40.00' and highlighted in yellow.
- Note:** A text area containing 'unscheduled visit' and highlighted in yellow.
- Total Payment:** 40.00 USD
- Buttons:** PAY (highlighted in yellow), MISSED, N/A, and CANCEL.

2. Select **"Miscellaneous Payment"** in the milestones drop-down menu.
3. Enter the payment value in the "Amount" field.
4. Add an appropriate comment in the "Note" field, e.g., Unscheduled Visit, etc.
5. Click **Pay**.