

## Module M: ClinCard Navigation

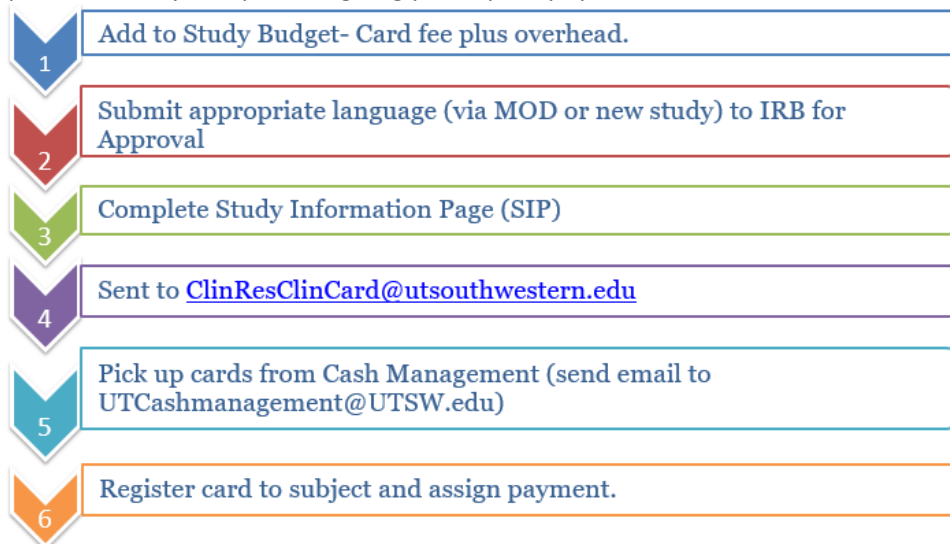
### Outline

#### A. ClinCard Overview

1. ClinCard by Greenphire is a web based tool that allows for reloadable, automated debit card reimbursement for subjects engaged in clinical trials
  - a. ClinCard saves the participant banking and ATM fees, while receiving payment quickly for site visits and travel related expenses
  - b. Study teams benefit from streamlined functionality of a web based tool to automate and manage payments rather than use gift cards or petty cash
  - c. For access, email: [ClinresClinCard@utsouthwestern.edu](mailto:ClinresClinCard@utsouthwestern.edu)

#### B. ClinCard Step by Step

1. 6 steps: From study setup to assigning participant payments



- a. The first 5 steps occur internal to UTSW, whereas registration and assigning cards to study participants occurs online via the [ClinCard Portal](#)
  - i. Participant subject ID must be Velos ID
  - ii. Entering subject's Social Security Number is not required, but it will affect IRS withholding; all participants will receive IRS Form 1099 for calendar year in which they received payments
  - iii. To assign a card, enter 16 digit code visible through window of Clincard envelope; do not open envelope

#### C. Navigating Patient Payments via the ClinCard Portal

1. Making a Site Visit Payment

- a. Click on “Make Site Visit Payment” under subject information and follow pop-up prompts. Select Milestone drop down box to indicate which visit is being paid; enter payment amount and click “pay” button.

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” on the left-hand side of the screen.

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

2. Making a Manual Subject Payment
  - a. Click the “Manual Subject Payment” option under the Subject Information menu, enter amount to pay and add appropriate comment in “Note” field, select “Pay.” A secondary site approver will be notified to approve the payment.
3. Lost or Stolen Cards
  - a. Advise subjects to call number provided in information packet **immediately**
  - b. A new card may be assigned (with the available remaining balance transferred) by:
    - i. calling a ClinCard customer support representative (incurs \$7 fee)
    - ii. via ClinCard Portal (\$4.50 activation fee)
  - c. Replacement cards will be sent through postal delivery

#### D. Helpful Tips

1. SIP (Study Information Page) templates are located on the [SPA website](#)
  - a. Individuals may **not** be granted both site coordinator and approver access
  - b. Travel reimbursement rates and milestone payments should tie to Informed Consent
2. Card fees and payments are charged to your study chart of accounts on a monthly basis
3. Located under the “Reports” tab of the ClinCard Portal, ClinCard has a variety of reports to help manage payments
4. ClinCard [FAQs](#) can be found on the SPA website’s document library
5. SPA staff responds to tickets in ServiceNow: SPAOutreach@utsouthwestern.edu