

ClinCard Quick Reference Guide

Please review the JCTO SOP located in the Researcher's Toolbox

► How to Login to www.clincard.com

- 1) Go 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 your capital letters are in the correct place.
- 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 that allows you to reset your password.

Note: Please e-mail clincard@med.cornell.edu if you have difficulty with your password

► How to Register a Subject

- 1) Login to www.clincard.com
- 2) Click on “Register Subject”
- 3) Enter the required information into the brief form
- 4) **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
- 6) You will be brought to the “Subject Information” screen where you can assign a card number, 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 e-mail clincard@med.cornell.edu

► How to Look Up a Subject Who Has Already Been Registered

- 1) Login to www.clincard.com
- 2) Click on “Look Up Subject”
- 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 and/or last name
 - b. Subject ID
 - c. Subject's initials
 - d. Subject's email
 - e. Last four (4) digits of ClinCard
- 4) Click on the underlined name of the Subject
- 5) You will be brought to the “Subject Information” screen where you can perform any of the actions required for the Subject, e.g., issue payment.



► How to Assign a ClinCard to a Subject

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 “Assign ClinCard” and a pop-up screen will appear
- 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: Envelop is given to the Subject sealed
- 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, please e-mail clincard@med.cornell.edu to deactivate the current card and reissue a new one.

Note: Include ClinCard Subject #, date of payment and amount of payment and notify the Subject of error in payment; if the payment has already been spent, there is no way to reverse

Note: Cards expire on the date listed in the envelope window, once the card expires the subject will need a new one.

► How to Make a Site Visit 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.

- 1) Click on “Make Site Visit Payment” and a pop-up screen will appear
- 2) Select from the dropdown box which milestone the patient is being paid, e.g., Visit 1, Visit 2, etc.
- 3) Click on the “Pay” button
- 4) 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.
- 5) 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

► How to Make a “Manual Subject Payment”

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 patient.

- 1) Click on “Manual Subject Payment” and a pop-up screen will appear
- 2) Enter the payment value that you want to pay to the Subject in the “Amount” field
- 3) Add an appropriate comment in the “Note” field, e.g., Unscheduled Visit, Week 32, etc.
- 4) Click on the “Pay” button



- 5) Once a payment request has been processed, the amount will be removed from the “Pending Payment” area and reflected in the “Available Balance” area

► How to Get Help

If you have questions about using ClinCard how it has been set up for your studies, or you have any other questions please e-mail clincard@med.cornell.edu.