

ClinCard Reference Guide: Site Coordinator

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

► How to Login to www.clincard.com

- 1) Login 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 to use capital letters as necessary.
- 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 allowing you to reset your password.

Note: You can also call our site support team at 215-609-4378.

► 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) Click on the "Register" button
- 5) You will be brought to the "Subject Information" screen where you can assign a card number, make a payment or edit a Subject's information
- 6) 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
- 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 # visible through the window of one of the ClinCard card packages you received

Note: Envelope should be 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, e-mail clincard@med.cornell.edu for a replacement card

► **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 Subject 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
- Note: The study must be completely built in order to process payments. Please see administrator guide part 1 and 2.*

► **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 Subject.

- 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 Make a Travel Reimbursement**

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 “Make Travel Payment” and you will be brought to a new page that will give you 3 travel reimbursement options:
 - a. Drive (calculates the appropriate amount to reimburse a Subject for kilometers driven to/from appointment)
 - b. Meal
 - c. Hotel (for expenses incurred in getting to screening)
 - d. Flight (for expenses incurred in getting to screening)
 - e. Other
 - 2) Enter the required information into the fields that will appear in the pop-up window
 - 3) Click on the “Save” button
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- 4) When you are finished making payment requests click on the “Submit Request” button
Note: Remember to upload all receipts with ClinCard Subject ID # written on it

► How to Register a Subject in an Additional or Extension Study

- 1) Locate the existing Subject Information page through the “Look Up Subject” menu tab.
- 2) Click on the **Edit Subject** tab.
- 3) Click on the **Add Study** link located on the top right hand side of the page.
- 4) Enter the new Subject ID, select the additional study and subject status.
- 5) Scroll to the bottom of the page, and click “Save”.

This will allow the subject to receive reimbursements for any additional studies on a previously assigned ClinCard.

► How to Request Assistance

If you have questions or comments about using the www.clincard.com Admin Portal, please e-mail clincard@med.cornell.edu.

► Frequently Asked Questions

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

A: Our system is configured with Google Maps, who sends us a total based on its own calculations. We cannot override this calculation. Should our total not match what the Subject drove, an “Add Other” payment may be entered for the difference, or a Manual Payment, if the “Add Other” option is not available.

Q: How is the ClinCard used by Subjects?

A Subject can use their ClinCard for:

1. *In-Store Purchases, selecting either “Credit” or “Debit” (“Debit” option requires PIN)*
 - *Using the “Debit” option will allow Subjects to select “cash back” option*
2. *Online Purchases*
3. *Cash Withdrawals at ATMs (requires PIN)*
4. *Cash Advances at a Banks*
 - *Subject must know the available balance on the card and inform the teller of the amount they would like to withdraw. Tellers are unable to check your balance.*
 - *Subject presents the teller with their signed ClinCard and a valid government-issued photo ID*
 - *The ClinCard is accepted at all MasterCard member banks (look for a MasterCard logo on the bank window/entrance)*

Q: Is there a fee for withdrawing amounts at an ATM?

If a Subject would like the convenience of using the ClinCard at an ATM, they will be Subject to fees which vary based on location.

However, there are alternate methods that a Subject can get cash without incurring any fees: A) By presenting their ClinCard, along with a valid state ID, to a teller at a bank, or B) Selecting the “cash back” option when making an in-store “debit” purchase.

Q: Can the debit card be used as a credit card?

Yes. At the terminal a Subject may press “credit,” which allows them to sign for the transaction rather than enter a PIN. However, some terminals will automatically request a PIN once a card has been swiped. In such cases, the Subject should either press “cancel” to be able to sign or tell the cashier they want to sign for their transaction.

Q: How does a Subject activate their ClinCard?

The ClinCard is active once the first payment is loaded. The Subject 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: How do I request more ClinCards?

Please e-mail clincard@med.cornell.edu and include the ClinCard request form from the JCTO website, Researcher’s Toolbox. Include that additional cards are being ordered for an existing study.

Q: How does a Subject obtain their PIN?

The Subject needs to call Customer Service at 1-866-952-3795 and follow the prompts through the IVR:

- 1) Press 1 for English or 2 for Spanish
- 2) Press 2 (to activate card & for account information)
- 3) Enter your 16-digit card number, followed by the “#” sign
- 4) Enter 3-digit security number (located on the back of card), followed by the “#” sign
- 5) Enter a 4-digit PIN of your choosing, followed by the “#” sign
- 6) Re-enter the same 4-digit PIN as confirmation, followed by the “#” sign

Q: What happens if a Subject loses their ClinCard?

The Subject should notify the site and the study coordinator will be able to replace it for them. By replacing the card in the ClinCard Portal, the old card will automatically be inactivated, rendering it unusable. Additionally, any funds remaining on the old card will automatically be transferred onto the new card.

Alternatively, the Subject can call customer service to replace their card, however, there is a \$7.00 fee for replacement and it will take 7-10 days to receive by mail.

Q: What contact information is required to register a Subject?

We require the following data fields be populated in order to register a Subject and assign them a ClinCard:

- Subject ID
- Name
- Initials
- Address
- Date of Birth (DOB) – please e-mail clincard@med.cornell.edu if your study does not collect DOB

All Subject information is stored in a secure fashion and data is never shared with parties outside of Greenphire.

Q: What if a payment is made in error?

If a payment is made in error, immediately e-mail clincard@med.cornell.edu with the ClinCard Subject ID #, date of payment and amount. Please also let the Subject know the payment was made in error. If a payment made in error is already spent, there is no way to reverse that payment.