Greenphire 101 for Clinical Studies

- **Procedures for Greenphire** located under References on our website for any questions about Greenphire or ClinCard system.

- For questions about how to process something on the Greenphire website, please see the video link (ClinCard Online Demo) at the bottom of Penn’s Greenphire website. The video is 20 minutes long, or once you hit play, you have the option to skip around. Place your mouse on the left side of the video, and an index will appear. Click on the section you want to watch.

- You can keep one stockpile of ClinCards for multiple studies in the UPenn Greenphire system. ClinCards are not assigned to any particular study. If you no longer can use your ClinCards, please return them to our office.

- The ClinCard Portal has been optimized to work best with Google Chrome and Mozilla Firefox.

- All payments to the ClinCard are considered same as cash. Subjects can call the Customer Service phone# with questions about balance and transactions or fraud. They also can register their card at www.myclincard.com to see transactions and balance.

- After you register a subject, you will be directed to their profile. Click the button Assign ClinCard and type in the Token# located on the front of the envelope.

- The ALL Study allows subjects to be available to all studies in the event a subject participates in multiple studies. You will only find subjects in studies funded by Penn and using ClinCard through the UPenn Greenphire site. With the ALL Study, the subject only needs to have one ClinCard. To add them to your study:
  - Pull up their profile in Look Up Subject, and then click on Edit Subject and click on ADD STUDY. A new drop down box will appear, and you can select your study. Scroll down and click SAVE.
  - Please do not replace the ALL Study with your study.

- If you want to pay a subject from more than one study, complete the registration process with the first study. Once you’re in their profile, add the second study (see above).

- If a subject loses their ClinCard, you can replace it if they’re an active member of your study (your discretion). Pull up their profile and click Replace ClinCard. Any available balance will automatically be transferred to the new ClinCard (may take 10 minutes). If they are not active in your study or any study at Penn, they can call the customer service number on the back of the ClinCard. They can also refer to the Cardholder FAQ for any questions.

- *If Applicable* Please issue reimbursements as separate payments from stipend payments. Each calendar year, Penn is required to report the earnings of subjects compensated $600 or more and send them a 1099 form. Reimbursements are not included in this total. Pay reimbursements using the Request Reimbursement button. Two choices: Drive (mileage calculator) and Other (flat amount). You’re not required to upload receipts. Please always click the box for Receipt received.
  - The mileage calculator defaults to the IRS medical rate (20 cents/mile). If you would like to use a different amount, let us know.

- If you’re paying all or most subjects the same type of stipend payment with the same dollar amount, we can set up milestone payments. When making a payment, you would click on Request Payment and then choose from a list to select the payment. Once the payment is made, it disappears, to prevent duplicate payments. Send an email to dofclinreq@pobox.upenn.edu to set up milestone payments. You can still make Miscellaneous Payments.

- Refer to Audit History tab in a subject’s profile to see if a payment has been processed or for information about a payment.

- If you make a Miscellaneous payment over $100, you will need to Approve that payment before it will be loaded onto the subject’s ClinCard. After loading the payment, the Approver has to go into the Payment Approvals screen to okay the payment (Coordinators can have Approver access). You can Decline a payment in this screen, too.

- The max one-time payment amount is $1,000. If you need to make a payment larger than this, please send an email to dofclinreq@pobox.upenn.edu, and we can temporarily raise the payment ceiling.

- **Update your password:** Log into www.clincard.com and click on User Settings in the top right corner. Click on Password Reset.

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