Greenphire 101 for Non-Clinical Programs


- **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 programs in the UPenn Greenphire system. **ClinCards are not assigned to any particular program.** 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.** Cardholders can call the Customer Service phone# with questions about balance and transactions or fraud. They also can register their card at [www.myclincard.com](http://www.myclincard.com) to see transactions.

- We require a **Subject ID#** for each participant. The field accepts numbers and letters, so you can enter an ID# or their name. This is required because when looking at reports or payments, you will not see their name, only the Subject ID#. This system was originally created for clinical studies, so the reporting information is “blind.”

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

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

- If a participant loses their **ClinCard**, you can replace it if they’re an active member of your program (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 program or any program 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 participants 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 business rate (58 cents/mile). If you would like to use a different amount, let us know.

- If you are paying all or most participants 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 dofclinc@pobox.upenn.edu to set up milestone payments. You can still make **Miscellaneous Payments**.

- Refer to **Audit History** tab in a participant’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 participant’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 dofclinc@pobox.upenn.edu, and we can temporarily raise the payment ceiling.

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