

Greenphire 101 for Clinical Studies

Please refer to this link for Penn's Greenphire webpage: http://www.finance.upenn.edu/comptroller/accts_payable/Greenphire/

- There is a **"Procedures for Greenphire"** on our webpage under "References" for any questions about Greenphire or the ClinCard system. It is updated regularly, and the document is date-stamped for your reference.
- If you have any 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 webpage. To watch it all the way through takes 20 minutes.
 - 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. Just click on the section you want to watch.
- You can keep one stockpile of **ClinCards** for multiple studies in the Penn Greenphire system. **ClinCards are not assigned to any particular study.**
- We set up the **ALL Study** so that all subjects would be available to all studies in the event a subject participated in multiple studies funded by Penn. You will only find subjects in studies funded by Penn and using ClinCard through our Greenphire system. 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." Then, click on "+ADD STUDY." A new drop down box will appear, and you can select your study.
 - Please do not replace the ALL study with your study.
 - Please do not attempt to pay a subject under the ALL Study; you will receive an error message.
- If you are registering a subject, and **you want to assign them to more than one study**, you must complete the registration process with the first study and then 'Look Up' the Subject and go into their profile to add the second study (see above).
- If you have used Greenphire through a sponsored study, you may have other sites available to choose from when registering subjects. For studies that are funded by Penn, please choose the **site "UPenn."** This is very important because if you register a patient and select a sponsored site, then anyone else with access to your study will not be able to pull-up that subject because they do not have access to that site.
- After you **register a participant**, you will be able to pull up their profile and click the button **"Assign ClinCard."** Type in the **Token#** located on the front of the envelope.
- If a participant loses their **ClinCard**, you can replace it if they're an active member of your study. Pull up their profile and click **"Replace ClinCard."** Any available balance will automatically be transferred to the new ClinCard. If they are not active in your study or any study at Penn, then they need to call the customer service number on the back of the ClinCard. They can also refer to the **Cardholder Reference Guide** for any questions.
- Please issue **reimbursements** as separate payments from manual payments. Participants are held responsible for any income/compensation that is \$600 or more. We are required to send them a 1099 form at the end of the calendar year. Reimbursements are not included in this. Pay reimbursements using the **TRAVEL REIMBURSEMENT** button.
- If you know you are going to be paying all or most subjects the same type of payment and the same dollar amount, we can set up **scheduled or milestone payments** for you. When making a payment, you would click on **MAKE SITE VISIT PAYMENT** and then choose from a dropdown box to select the payment. Once the payment is made, it disappears, so you won't accidentally pay someone more than once. Please contact us to set up milestone payments.
- If you make a Manual **Payment** over \$100, you will need to **Approve** that payment before it will be loaded onto the subject's ClinCard. After you schedule the payment, the Approver has to go into the **Payment Approvals** screen to okay the payment (Coordinators can have Approver access). The max one-time payment amount is \$1,000. If you need to make a payment larger than this, please send an email to the DOFLINREQ email address, and we can temporarily raise the payment ceiling.
- When using the **mileage calculator** in Greenphire to reimburse subjects for travel, the system defaults to the IRS medical rate. If you would like your study to use the IRS business rate, please include that when you submit your request. If you already have a study set up in Greenphire, and you would like to change the reimbursement rate, please contact us. This is a decision that should be decided by your clinical team, and you can also consult with your Business Administrator.