

THE GREENPHIRE PROCESS (Summarized)

Getting Started with Greenphire

To begin the process of getting your study or program set up in the system, please submit a request via our online form.

<https://www.finance.upenn.edu/disbursements-accounts-payable/paying-human-subjectsothers>

The **link** for the request form is highlighted in maroon.

- Under **Request Type**, *A Non-Clinical Program* is for Schools/Centers paying stipends or reimbursements to groups that are not involved in any kind of research. The *Cash Card* is the replacement for Petty Cash on campus. The majority of our users will select *Research Study* (with or without an IRB#).
- Refer to the **Procedures** document for explanation about this form and process.

We need BA/finance approval to set up a study in Greenphire. You will need to include in the form the name/email address of the BA/finance person who will approve the request. Once you hit the **Submit** button, emails of your request are sent to you, the BA/finance person, and to us. The BA/finance person can click **Reply All** in the email and let us know they approve.

Getting Access to Greenphire

You will receive an email from us when your ClinCards are ready to be picked up. Once you pick them up, we will give you access to your study in Greenphire. If you're a new user, you will receive an email from Greenphire with your username and a link to assist with logging in for the first time and setting up your password.

Paying Your Participants

The Greenphire ClinCard is a **reloadable debit card**. Please tell subjects to hold on to their ClinCard, especially if they will receive multiple payments from your study. If they participate in other studies on campus, they can be paid using the same ClinCard, as long as the study is also using the **UPenn** Greenphire ClinCard system.

To begin the process of paying your subjects, you first need to register them in the Greenphire ClinCard system. Click on the tab **REGISTER SUBJECT**. Choose the correct study, and then enter their First/Last Name, Address, and DOB.

- Refer to the **Know Your Customer** document explaining why this information is necessary.
- Also, enter the Subject ID# that you have assigned them in your study. If no Subject ID#, you can use their initials, name, etc.

You can also add the subject's cell phone and/or email address for automatic alerts when payments are loaded.

When you click the **REGISTER** button, you will be brought to the subject's profile.

Click **ASSIGN CLINCARD** and enter the 8-digit Token# on the front of the ClinCard envelope. Click **ASSIGN**.

The subject is now set up to be paid. Click **REQUEST PAYMENT** to pay a stipend.

- **Milestone Payments:** You can have the Penn Admin set up your payment schedule if all or most of your subjects will be paid the same amount for the same type of visit. When paying, just select the appropriate milestone and click **PAY**.
- **Miscellaneous Payments:** Select this and then enter the dollar amount, a brief note, and click **PAY**. A payment over \$100 will have to be double-checked for accuracy. Click on the **PAYMENT APPROVALS** tab.
 - The coordinator that loads the payment can be the same person that approves it. We just want a second look to confirm the payment amount is correct.

Participant Already Has a ClinCard

If a subject says they already have a ClinCard, you can search in the ClinCard system by their name and/or the last 4 digits of the ClinCard. Everyone has access to the **ALL Study** which allows subjects to participate in multiple studies using the same ClinCard. If you do not see them in the system, email or call Penn Admin (dofclinreq@pobox.upenn.edu), and we will look them up.

You can add their existing profile to your study:

Click **EDIT SUBJECT** and then click **+ADD STUDY** which is under the dropdown menus under the heading **Study Membership for UPenn**.

Click on the arrow to select your study and add the **Subject ID#**

Scroll down and click **SAVE**. You can update any of the info on this page as necessary.

Subjects Using the ClinCard

Once the payment is loaded to the ClinCard, the card is activated, and the subject can spend the money right away.

- The easiest way to use the card is as **Credit** (It is a MasterCard.) either in a store or online.
- The subject can also set up a PIN# and use the card as debit to make purchases and get cash back.
- The subject can go to a bank and speak with a bank teller to get cash off the ClinCard.
 - Please give each subject the **MasterCard Face-to-Face** sheet. The Penn Admin can add their name to it where it says *Dear Cardholder*.
- The subject can also go to an ATM, but they will pay the ATM fee, and a fee of \$3.50 will be deducted from the balance of the ClinCard.

Please contact us at dofclinreq@pobox.upenn.edu with any questions or issues.