UT Dallas ClinCard Site Coordinator FAQ

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I. Getting Started

UT Dallas uses the GreenPhire system to distribute human research subject payments via a pre-paid MasterCard (a “ClinCard”).

To set up a study in GreenPhire, submit a completed Schedule of Human Subject Payments form and IRB approval letter to clincard@utdallas.edu. No requisition is required to obtain cards or study budget.

The Bursar’s office issues ClinCard stock to the PIs (or their delegate) after a study is set up in the GreenPhire system. Cards are signed out from the Bursar’s safe. The study PI is ultimately responsible for control and safekeeping of ClinCard stock.

Site coordinators first register a subject, then assign a card, and finally load their card with funds via scheduled Site Visit Payments and unscheduled Manual Payments. Re-use of cards is encouraged for returning subjects.

The www.clincard.com site portal is used to register subjects, load payments, and report activity. You can also replace lost or damaged cards using www.clincard.com. For login credentials (or any questions about portal use) please contact clincard@utdallas.edu.

When a study using ClinCards is completed, closed, or canceled, it must be closed-out. Close-out ensures that funds and cards assigned to a study are released.

Please email clincard@utdallas.edu with any questions or concerns about ClinCards.
II. Register a Subject

1. Log in to www.clincard.com and
2. Click Register Subject in the upper left corner, and select your study from the pull-down.

3. At the Subject Registration screen (below), specify a Subject ID unique to this subject and this study (any string can be used).
4. Populate the Subject ID, Site, and Date of Birth fields as shown below, and click Register.

   **NOTES: Always specify January 1, 2001 (01/01/2001) in the “Date Of Birth” field. Inform the cardholder that their card “system” birth date is 01/01/01.**

   The subject is now registered, and you may assign them a ClinCard.
III. Find a Registered Subject

1. To find a subject, click **Look Up Subject**, select your study from the pulldown, and click **Search**.
2. In the **Search Results**, click on the subject for whom you’d like to assign a card or load funds.

3. The **Subject Information** tab appears (see next section). From this tab, you can assign a ClinCard, and make scheduled Site Visit Payments and unscheduled Manual Payments.
IV. Assign ClinCard

1. Find your subject as shown in Section III above.
2. The Subject Information tab (below) appears. Click Assign ClinCard on the right:

3. At the Assign ClinCard pop-up (below right), input the Token # from the envelope containing the subject’s ClinCard, and click Assign:

The subject has now been assigned this card in the GreenPhire system, and you can load funds. Funds can be loaded via scheduled Site Visit Payments, or unscheduled Manual Payments (see next section).
V. Load Funds: Site Visit Payments (Scheduled)

Site visit payments are scheduled and approved when a study is set up in GreenPhire (via the Schedule of Planned Subject Payments form). Scheduled payments do not require approval after loading.

Make a site visit payment as follows:

1. Navigate to the subject you’d like to pay as shown in section III above.
2. At the Subject Information tab, click Make Site Visit Payment:

   ![Make Site Visit Payment](image1)

3. At the Make Site Visit Payment pop-up (below), select the Milestone associated with the payment, make any optional Notes, and click Pay:

   ![Make Site Visit Payment](image2)

The selected payment is loaded on the subject’s card and available for use within an hour or so.
VI. Load Funds: Manual Payments (Unscheduled)

Manual subject payments can be for any amount, and require approval in the GreenPhire system before the subject can use the funds.

Make a manual site visit payment as follows:

1. Navigate to the subject you’d like to pay as shown in section III above.
2. At the Subject Information tab (below), click Manual Subject Payment:
3. At the **Manual Subject Payment** dialog (below), specify an **Amount**, note additional information for the approver in the **Note** field, and click **Make Payment**:

![Manual Subject Payment dialog](image)

Study approvers receive an email notification to approve manual payments in clincard.com. Payments must be approved before being available for use on the ClinCard.

4. To approve manual subject payments, log into clincard.com and navigate to **Payment Approvals** (or click the link in the notification email).
5. In the Payment Approvals screen (below), check the box next to the payment(s) you want to approve or decline.

![Payment Approvals Screen](image)

6. Make any optional notes relating to the approval in the Add Notes field.

7. Click the Approve Selected or Decline Selected button to approve or decline the payment(s).

Approved payment(s) are loaded on the subject’s card, and are available for use within an hour or so. Declined payments are canceled and cannot be approved later.

VII. Study Close-Out

When a study using ClinCards is completed, closed, or canceled, it must be closed-out in GreenPhire. Any unused ClinCards must be returned at the completion of the study. This close-out ensures that any remaining study funds are released, and unused ClinCards can be re-assigned to another study.

To close out a ClinCard GreenPhire study, complete the Close/Cancel ClinCard Subject Payments form, available on the Office of Contracts web site.

The completed Close/Cancel ClinCard Subject Payments form should be returned with any unused ClinCards, to the Office of Contracts and Special Projects, AD 2.408, Mailstop AD31.
VIII  Notes

- Cardholders MUST know the date of birth associated with their card to check card balance via phone, or set up a PIN for use as a debit card. Specify 01/01/2001 as the Date of Birth for ALL cardholders.

- Cardholder documents assume 01/01/2001 as the Date of Birth. Using a different Date of Birth value will result in cardholder support calls to the site coordinator.

- Encourage the cardholder to use the full balance on the card immediately, most easily via making a credit card purchase for the full card value, or by requesting the full balance in cash from a bank teller.

- In case of loss/damage, UT Dallas site coordinators can replace cards for up to 6 months after the last funding. Replacement deactivates the old card, transferring any remaining balance to the new card. After 6 months, or in case of theft, the cardholder must call ClinCard support at 1-866-952-3795.

IX  Other Resources

- Using Your UT Dallas ClinCard is a short guide for subjects on the easiest ways to use their ClinCard. Distribute this to subjects, and you will receive fewer calls!

- The UT Dallas ClinCard Cardholder FAQ contains detailed instructions for subjects on ClinCard use, and registering the card at www.myclincard.com to view card balance and purchase history.

- Refer to UTDBP3036 – Policy on Payment of Research Subjects for the requirements and process for human subject payments, including confidentiality, IRS requirements, and accounting.


- The Office of Contracts Administration is available to help and support Principal Investigator, Site Coordinators, and department personnel with ClinCard questions at clincard@utdallas.edu.