

# 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](mailto:clincard@utdallas.edu). No requisition is required to obtain cards or study budget information.

The *Schedule of Human Subject Payments* form and other ClinCard resources are available at <https://www.utdallas.edu/contract/clincard-payments/> and via [clincard@utdallas.edu](mailto:clincard@utdallas.edu).

The Office of Contract Administration issues ClinCards to PIs (or a delegate) after an approved study is set up in [clincard.com](http://clincard.com). Cards are generally signed out from the reception desk on the 2<sup>nd</sup> floor of SP2 or delivered to sites via campus mail. The study PI is ultimately responsible for control of ClinCard loads.

Site coordinators first register a subject with a subject ID, then assign a card to the subject ID, and finally load the card with funds via scheduled Site Visit Payments (of pre-determined amounts) and unscheduled Miscellaneous Payments (amounts determined at time of distribution). Re-use of cards for returning subjects is encouraged.

Use the [www.clincard.com](http://www.clincard.com) site portal to register subjects, assign cards, load payments, and report activity. You can also replace lost or damaged cards using [www.clincard.com](http://www.clincard.com). For login credentials (or any questions about portal use) please contact [clincard@utdallas.edu](mailto: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. This can be accomplished by submitting a completed *Close/Cancel ClinCard Subject Payments* form to [clincard@utdallas.edu](mailto:clincard@utdallas.edu).

Please email [clincard@utdallas.edu](mailto:clincard@utdallas.edu) with any questions or concerns about ClinCards.

## II Register a Subject

1. Log in to [www.clincard.com](http://www.clincard.com), and
2. Click **Register Subject** in the upper left corner, and select your study from the pull-down.

The screenshot shows the 'Subject Registration' page. At the top, there is a green navigation bar with the following links: REGISTER SUBJECT, LOOK UP SUBJECT, PAYMENT APPROVALS, ADMIN, REPORTS, and SUPPORT. The 'REGISTER SUBJECT' link is highlighted with a red box. Below the navigation bar, there is a green box with a checkmark icon and the text 'Subject Registration'. Below this, there is a message: 'To begin the registration process, please select a study\*'. Below the message is a dropdown menu with the text '-- Select Study --'. The dropdown is open, showing a list of studies. The study 'Admin Test Live Card' is highlighted with a red box. Other studies listed include 'Acoustic Variability and Perception of Children's Speech', 'Affordable Breath Analyses for Monitoring of Diabetes', 'Aging, working memory and attentional processes', 'A Longitudinal Assessment of Recreational Marijuana Users', and 'Altered Neutrophil Function in Ventricular Assist Devices'.

3. At the **Subject Registration** screen (below), specify a **Subject ID** unique to this subject and this study (any string can be used). Do not use personally identifiable info in the **Subject ID**.

4. Populate the **Subject ID**, **Site**, and **Date of Birth** fields exactly 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 screenshot shows the 'Subject Registration' web form. At the top is a green navigation bar with links: REGISTER SUBJECT, LOOK UP SUBJECT, PAYMENT APPROVALS, ADMIN, REPORTS, and SUPPORT. Below the navigation bar is a green checkmark icon and the title 'Subject Registration'. The form contains several fields: a dropdown for 'To begin the registration process, please select a study\*' with 'Admin Test Live Card' selected; 'Study Status\*' with 'Enrolled' selected; 'Subject ID\*' with a red box containing the text 'UNIQUE ID'; 'Site\*' with a dropdown menu showing 'University of Texas at Dallas' and a red box around the field; 'Personal' section with 'Timezone\*' set to 'America/Eastern' and 'Language' set to 'English'; and 'Date Of Birth\*' with '01-Jan-2001' entered and a large red box containing the text 'SPECIFY 01/01/2001 FOR ALL CARDS'. A green 'REGISTER' button is at the bottom.

5. Click **Register**.

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.

REGISTER SUBJECT **LOOK UP SUBJECT** PAYMENT APPROVALS ADMIN REPORTS SUPPORT

## Look Up Subject

Study  
Admin Test Live Card

Only Studies with registered cardholders are displayed.

Name Subject ID Initials

Subject Email Last 4 Digits of ClinCard

**SEARCH**

**Search Results**  
20 records found

SEARCH:

LAST NAME	FIRST NAME	LAST FOUR	LOCATION	STUDY	ID
Cardholder	Valued	5429	University of Texas at Dallas	Admin Test Live Card	test live
Cardholder	Valued	None	University of Texas at Dallas	Admin Test Live Card	Admin live test subject 2

**RECENT ACTIVITY**

- Approved payment of \$50.00 for Valued Cardholder: Manual...
- Declined payment \$98.86 for Valued Cardholder: declined
- Submitted a manual payment of \$98.86 for Valued Cardholder: ...
- Changed Valued Cardholder subject information
- Approved payment of \$200.00 for Valued Cardholder: Manual...
- Cardholder Valued Cardholder has enrolled in study Admin Test Live...

[VIEW ALL >](#)

3. The **Subject Information** tab appears (see next section). From this tab, you can assign a ClinCard, make scheduled Site Visit Payments (Milestone Payments) of pre-determined amounts, and request unscheduled Miscellaneous Payments of amounts specified at time of request.

## IV. Assign ClinCard

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

The screenshot shows the 'Look Up Subject' interface. At the top, there is a 'Look Up Subject' header with a magnifying glass icon. Below it is a '< Return to search results' link. The main content area is titled 'VALUED CARDHOLDER' and has two tabs: 'SUBJECT INFORMATION' (selected) and 'AUDIT HISTORY'. Under 'SUBJECT INFORMATION', there are three columns of data: 'Study Name' (Admin Test Live Card), 'Subject ID' (UNIQUE ID 40), and 'No card assigned.'; 'Study status' (Enrolled), 'Address' (800 W. Campbell Road, Richardson, TX 75080), and 'Timezone' (America/Chicago); and 'Recent Activity' (Cardholder Valued Cardholder has enrolled in study Admin Test Live Card with status Enrolled, Created new subject Valued Cardholder). On the right side, there is a vertical list of action buttons: 'ASSIGN CLINCARD' (highlighted with a red box), 'REQUEST PAYMENT', 'REQUEST REIMBURSEMENT', 'EDIT SUBJECT', and 'SCHEDULE APPOINTMENT'.

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

The screenshot shows a pop-up window titled 'Assign ClinCard' with a close button (X) in the top right corner. On the left, there is a simulated ClinCard envelope with the following text: '9CK877Z1 0001 000631', 'UT DALLAS CLINCARD', 'Token #: [redacted]', 'Valued Cardholder', and 'Expiration Date: 05/19'. A red arrow points from the 'Token #' field on the envelope to the 'New Card\*' input field in the pop-up. The 'New Card\*' field contains the text 'CARD TOKEN NUMBER'. Below this field are two buttons: 'ASSIGN' (highlighted with a red box) and 'CANCEL'.

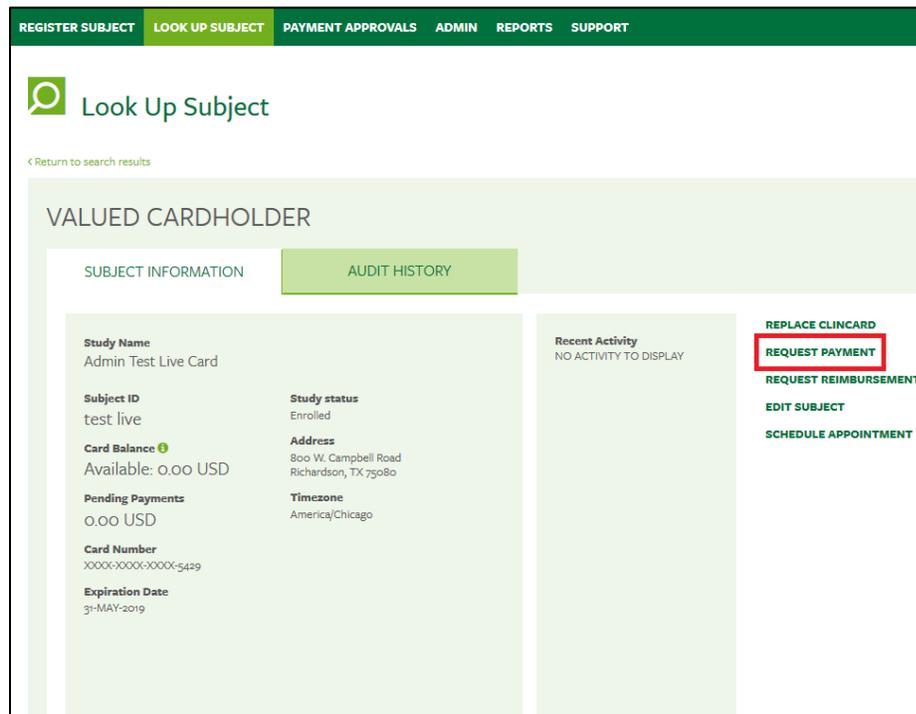
The Subject ID has now been assigned this card in the GreenPhire system, and you can load funds. Site Coordinators can load funds via Scheduled Milestone Payments or Unscheduled Miscellaneous Payments.

## V. Load Funds: Milestone Payments (Scheduled)

Site visit payment amounts are scheduled and approved when a study is set up (from information provided on the *Schedule of Planned Subject Payments* form). Scheduled site visit payments do not require approval after loading, and are immediately available for use on the card.

Load a scheduled milestone payment as follows:

- I. Navigate to the subject you would like to pay as shown in section III above.
- II. At the **Subject Information** tab, click **Request Payment**:



The screenshot displays the 'Look Up Subject' interface. At the top, there is a navigation bar with tabs: REGISTER SUBJECT, LOOK UP SUBJECT (highlighted), PAYMENT APPROVALS, ADMIN, REPORTS, and SUPPORT. Below the navigation bar, the page title is 'Look Up Subject' with a magnifying glass icon. A link '< Return to search results' is visible. The main content area is titled 'VALUED CARDHOLDER' and has two tabs: 'SUBJECT INFORMATION' (selected) and 'AUDIT HISTORY'. The 'SUBJECT INFORMATION' tab shows the following details:

<b>Study Name</b> Admin Test Live Card	<b>Study status</b> Enrolled	<b>REPLACE CLINCARD</b> <b>REQUEST PAYMENT</b> (highlighted in red) <b>REQUEST REIMBURSEMENT</b> <b>EDIT SUBJECT</b> <b>SCHEDULE APPOINTMENT</b>
<b>Subject ID</b> test live	<b>Address</b> 800 W. Campbell Road Richardson, TX 75080	
<b>Card Balance</b> ⓘ Available: 0.00 USD	<b>Timezone</b> America/Chicago	
<b>Pending Payments</b> 0.00 USD		
<b>Card Number</b> XXXX-XXXX-XXXX-5429		
<b>Expiration Date</b> 31-MAY-2019		

Recent Activity: NO ACTIVITY TO DISPLAY

- III. At the **Request Payment** pop-up (below), select the **Milestone** associated with the payment, and make any optional **Notes**:

**Request Payment** X

To  
Valued Cardholder

Study  
Admin Test Live Card

Milestone:\*  
Milestone 3 Description: 5.00 USD

**Total Payment**  
**5.00 USD**

Notes  
Make any notes about this payment in this field.

**PAY** **MISSED** **N/A** **CANCEL**

- IV. Click **Pay**.

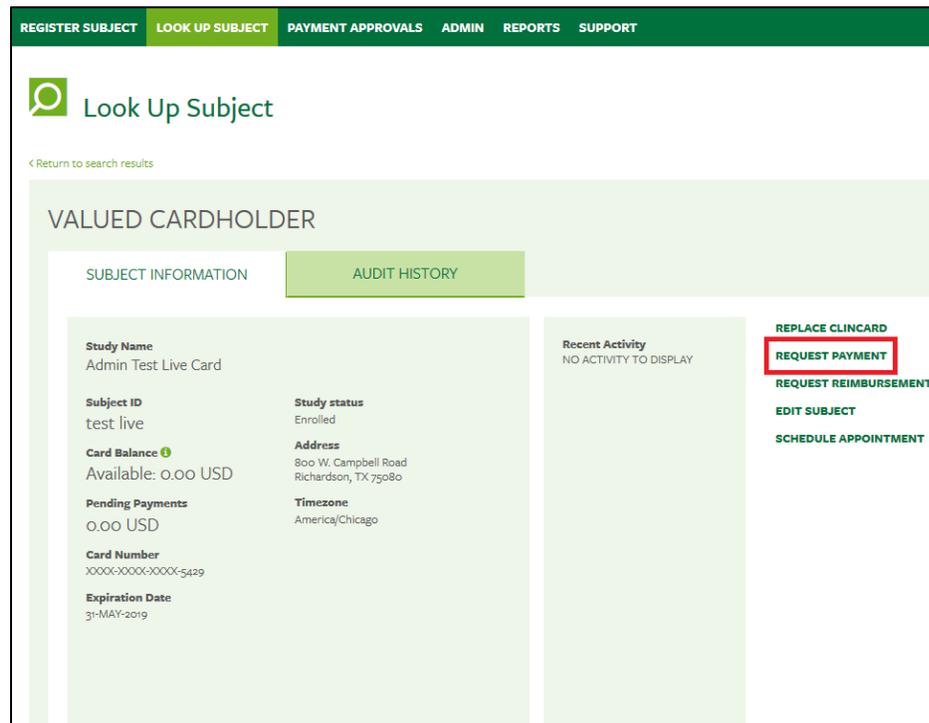
The selected payment is loaded on the subject's card and available for use within several minutes.

## VI. Load Funds: Miscellaneous Payments (Unscheduled)

Miscellaneous subject payments (formerly “manual payments”) can be for any amount, and require approval in the ClinCard system before the subject can use the funds.

Request a miscellaneous 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 **Request Payment**:



The screenshot shows the ClinCard interface for a subject. The top navigation bar includes: REGISTER SUBJECT, LOOK UP SUBJECT (active), PAYMENT APPROVALS, ADMIN, REPORTS, and SUPPORT. The main heading is 'Look Up Subject' with a magnifying glass icon. Below it is a link '< Return to search results'. The subject is identified as 'VALUED CARDHOLDER'. There are two tabs: 'SUBJECT INFORMATION' (active) and 'AUDIT HISTORY'. The 'SUBJECT INFORMATION' tab displays the following details:

<b>Study Name</b> Admin Test Live Card	<b>Study status</b> Enrolled	<b>REPLACE CLINCARD</b> <b>REQUEST PAYMENT</b> (highlighted with a red box) <b>REQUEST REIMBURSEMENT</b> <b>EDIT SUBJECT</b> <b>SCHEDULE APPOINTMENT</b>
<b>Subject ID</b> test live	<b>Address</b> 800 W. Campbell Road Richardson, TX 75080	
<b>Card Balance</b> ⓘ Available: 0.00 USD	<b>Timezone</b> America/Chicago	
<b>Pending Payments</b> 0.00 USD		
<b>Card Number</b> XXXX-XXXX-XXXX-5429		
<b>Expiration Date</b> 31-MAY-2019		

On the right side of the 'SUBJECT INFORMATION' tab, there is a 'Recent Activity' section with the text 'NO ACTIVITY TO DISPLAY'.

The **Request Payment** dialog appears.

At the **Request Payment** dialog (below), select **Miscellaneous Payment** in the dropdown menu:

The screenshot shows the 'Request Payment' dialog with the following fields and options:

- To:** Valued Cardholder
- Study:** Admin Test Live Card
- Milestone\*:** A dropdown menu is open, showing options: --SELECT MILESTONE--, Miscellaneous Payment (highlighted with a red box), Milestone 3 Description: 5.00 USD, Milestone 4 Description: 5.00 USD, Milestone 5 Description: 5.00 USD, Milestone 5 Description: 5.00 USD, and Milestone 6 Description: 5.00 USD.
- Total Payment:** 0.00
- Notes:** An empty text area.
- Buttons:** CANCEL, and a partially visible REQUEST button.
- Recent Activity:** Preset Payment Option, \*Milestone 2 Description: 5.00USD\* was marked pay.

3. Specify the **Amount** and document the reason for payment in the **Notes** field (required).

The screenshot shows the 'Request Payment' dialog with the following fields and options:

- To:** Valued Cardholder
- Study:** Admin Test Live Card
- Milestone\*:** Miscellaneous Payment
- Amount\*:** 5.00 (highlighted with a red box)
- Total Payment:** 5.00 USD
- Notes\*:** Make any notes about this payment. (highlighted with a red box)
- Buttons:** PAY (highlighted with a red box), MISSED, N/A, and CANCEL.

4. Click **Pay**.
5. Study approvers specified on the *Schedule of Human Subject Payments* form receive an email notification requesting approval. Miscellaneous payments must be approved via [clincard.com](http://clincard.com) before becoming available for use on the ClinCard.

## A. Approvals:

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

REGISTER SUBJECT LOOK UP SUBJECT **PAYMENT APPROVALS** ADMIN REPORTS SUPPORT

Payment Approvals

**APPROVE SELECTED** **DECLINE SELECTED** CANCEL

Unchecked payments will continue to wait for approval.

**Selected Totals By Currency Type** (Displaying 1 - 1 of 1 pending payment available)

US DOLLAR

2.00 USD

FILTER BY: DATE RANGE STUDY SUBJECT ID

AMOUNT	TYPE	DATE	STUDY	SUBJECT ID	IN REVIEW	ADD NOTE
<input checked="" type="checkbox"/>	2.00 USD Miscellaneous Payment	09-Oct-2018	Admin Test Live Card	test live	<span>No</span>	Type to add note...
	Notes:	Reimbursement for travel to site.				
	Requester:	Erin Jordan				

3. Make any optional notes relating to the approval in the **Add Notes** field.
4. 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. Processing Errors

Errors made by site personnel during the course of a study in the areas of subject registration, payments, and approvals cannot be corrected retroactively. While some payments and fees may be reversed upon PI request to [clincard@utdallas.edu](mailto:clincard@utdallas.edu), the UT Dallas ClinCard system is set up to ensure compliance via separation of duties, which limits the abilities of ClinCard administrators. ClinCard administrators have no access to reverse, override, delete, or change time/user stamps recorded for ClinCard activity.

## VIII. 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, subject payment data is locked for integrity and unused ClinCards can be re-assigned to another study.

To close out a ClinCard study, complete the *Close/Cancel ClinCard Subject Payments* form, available on the Office of Contracts web site at <https://www.utdallas.edu/contract/clincard-payments/>.

Return the completed *Close/Cancel ClinCard Subject Payments* form with any unused ClinCards to the Office of Contracts and Special Projects, SP2, Mailstop 22.

## IX. Notes

- Specify 01/01/2001 as the date of birth for ALL cardholders.
- **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.**
- **Cardholder documents assume 01/01/2001 as the Date of Birth. A date of Birth value other than 01/01/2001 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.**

## X. Other Resources

- The *UT Dallas ClinCard Cardholder FAQ* contains detailed instructions for subjects on ClinCard use, and registering the card at [www.myclincard.com](http://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 *GreenPhire/ClinCard Procedures* document contains detailed instructions on GreenPhire ClinCard setup, use, and administration.
- The Office of Contracts Administration is available to help and support site and department personnel with ClinCard questions at [clincard@utdallas.edu](mailto:clincard@utdallas.edu).