



ClinCard Quick Reference Guide

Site Coordinator + Direct Deposit

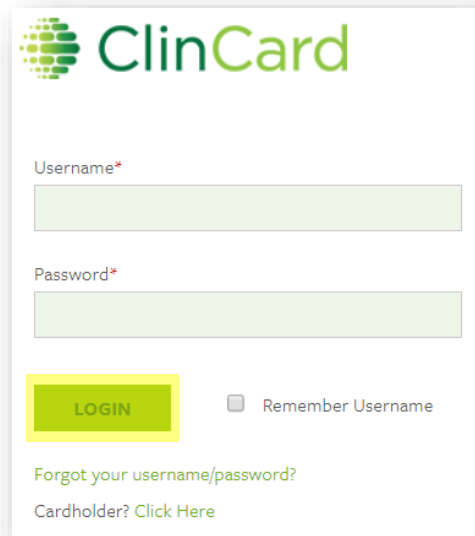
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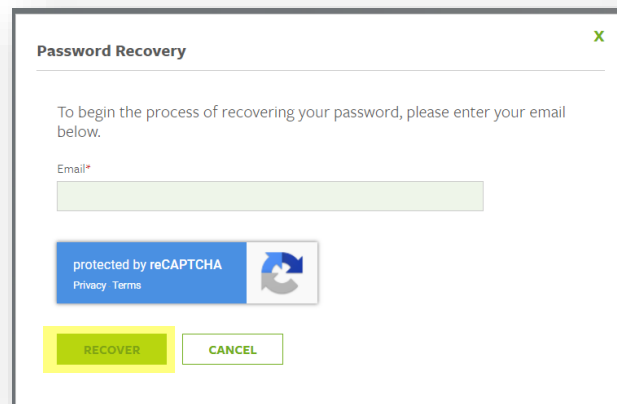
Login to ClinCard

1. Login to www.clincard.com.
2. Enter your username and password. *Your login credentials are case sensitive.



The image shows the ClinCard login page. At the top left is the ClinCard logo. Below it are two input fields: 'Username*' and 'Password*'. To the right of the password field is a checkbox labeled 'Remember Username'. Below the input fields is a yellow 'LOGIN' button. Underneath the button are two links: 'Forgot your username/password?' and 'Cardholder? Click Here'.

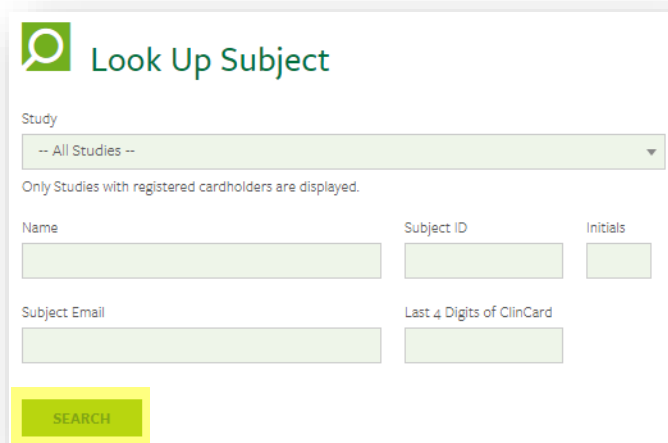
3. If you have difficulty logging in, click **Forgot your username/password?**. Enter your email address and click **Recover**.
 - a This will instantly send you an email with a link that allows you to reset your password.
 - b You can also call our site support team:
 - i Local United States/Canada: (215) 609.4378
 - ii United States Toll Free Number: (844) 847.0107



The image shows a 'Password Recovery' dialog box. It has a title bar with 'Password Recovery' and a close button (X). The main text says 'To begin the process of recovering your password, please enter your email below.' Below this is an 'Email*' input field. At the bottom left is a blue box with 'protected by reCAPTCHA' and 'Privacy Terms' next to a reCAPTCHA logo. At the bottom are two buttons: a yellow 'RECOVER' button and a white 'CANCEL' button.

Look Up a Previously Registered Subject

1. Login to www.clincard.com.
2. Click the **Look Up Subject** tab.
3. Enter one of the following pieces of information:
 - a. First name and/or last name
 - b. Subject ID
 - c. Subject's initials
 - d. Subject's email
 - e. Last four (4) digits of ClinCard
4. Click **Search**.

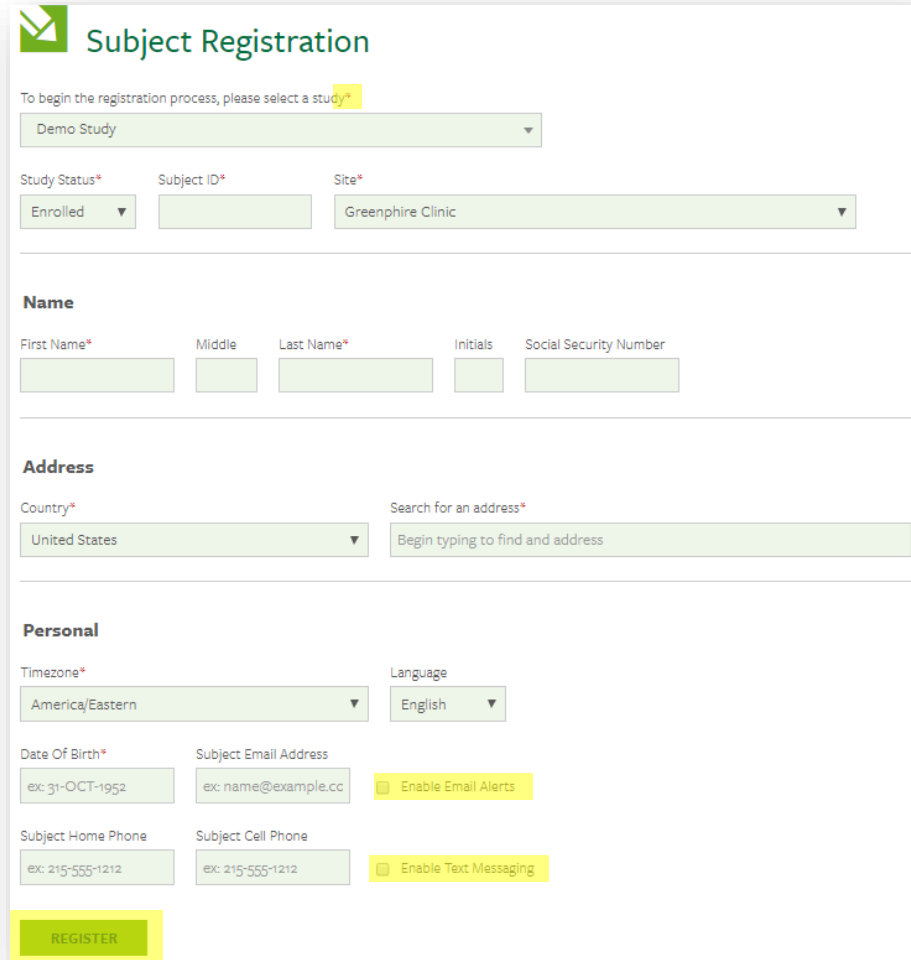


5. Results will appear below the “Search Results” header.
6. Click the hyperlink **Last Name** of the Subject.

LAST NAME	FIRST NAME	LAST FOUR	LOCATION	STUDY	ID
Tester	Demo	None	Greenphire Clinic	Demo Study	789456

Register a Subject

1. Login to www.clincard.com.
2. Click the **Register Subject** tab.
3. Select the appropriate Study from the drop-down menu.
4. Enter the information into the form. Fields denoted with a red asterisk (*) are required.



Subject Registration

To begin the registration process, please select a study*

Demo Study

Study Status* Subject ID* Site*

Enrolled Greenphire Clinic

Name

First Name* Middle Last Name* Initials Social Security Number

Address

Country* Search for an address*

United States Begin typing to find and address

Personal

Timezone* Language

America/Eastern English

Date Of Birth* Subject Email Address Enable Email Alerts

ex: 31-OCT-1952 ex: name@example.cc

Subject Home Phone Subject Cell Phone Enable Text Messaging

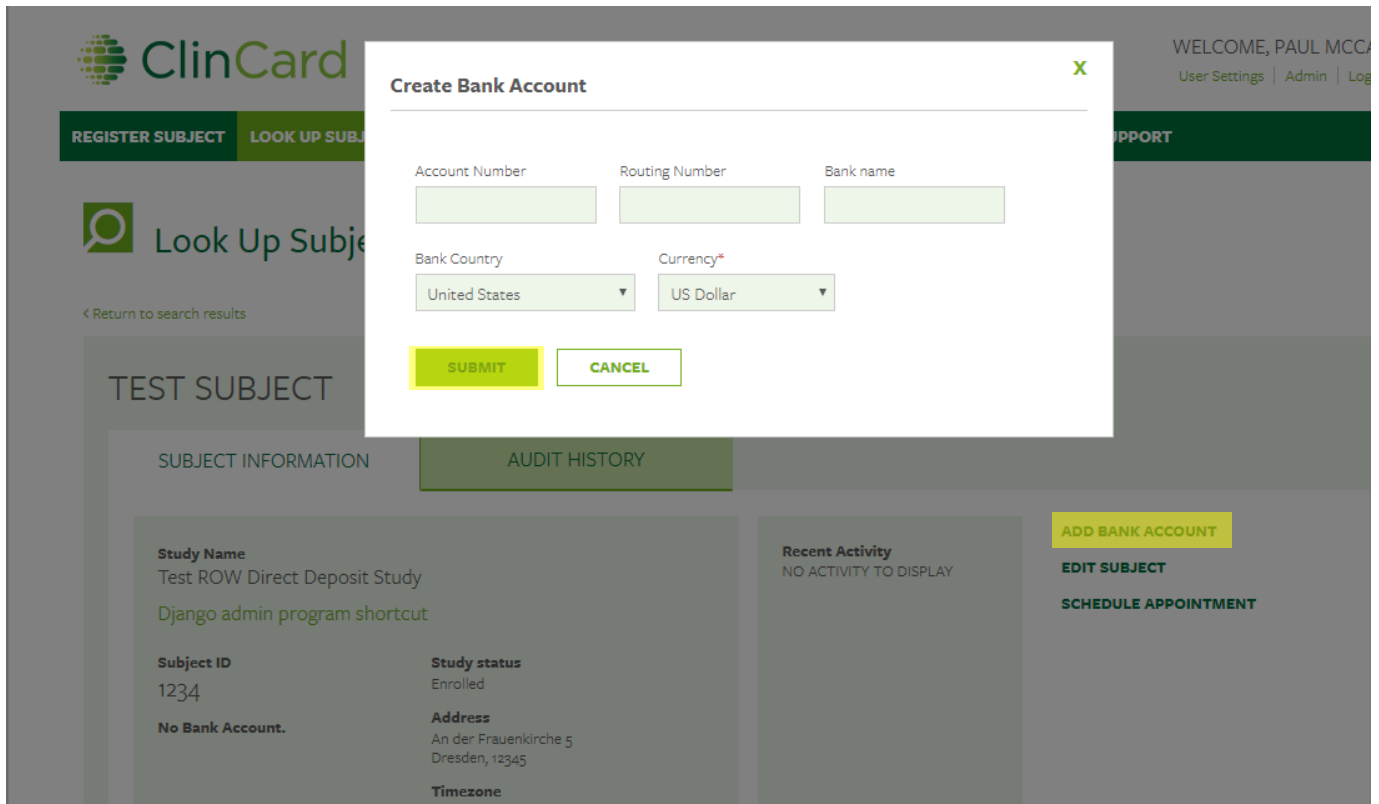
ex: 215-555-1212 ex: 215-555-1212

REGISTER

- a. If you would like the Subject to receive payment confirmations or appointment Reminders, select the “Enable Email Alerts” and “Enable Text Messaging” checkboxes.
5. Click **Register**.

Enter Bank Account Information

1. Click **Add Bank Account** and a pop-up screen will appear.



Create Bank Account X

Account Number Routing Number Bank name

Bank Country Currency*

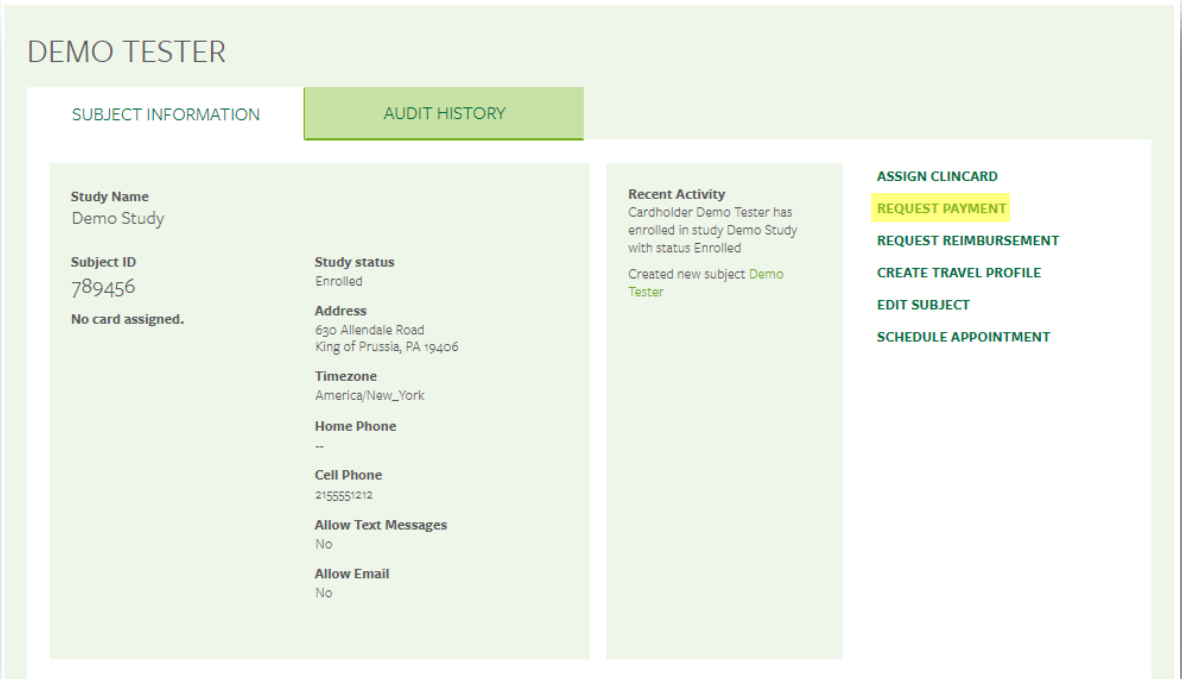
United States US Dollar

SUBMIT **CANCEL**

2. Enter the required bank account information.
3. Click **Submit**.
4. Once the card has successfully been assigned, you will receive a confirmation message at the top of the “Subject Information” screen.

Request a Payment

1. Click **Request Payment** and pop-up screen will appear

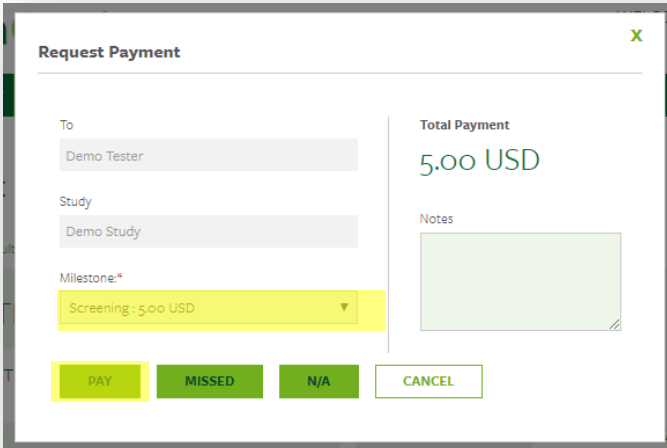


The screenshot shows a user interface for a subject named 'DEMO TESTER'. It features two tabs: 'SUBJECT INFORMATION' and 'AUDIT HISTORY'. The 'SUBJECT INFORMATION' tab is active and displays the following details:

- Study Name:** Demo Study
- Subject ID:** 789456
- No card assigned.**
- Study status:** Enrolled
- Address:** 630 Allendale Road, King of Prussia, PA 19406
- Timezone:** America/New_York
- Home Phone:** --
- Cell Phone:** 2155551212
- Allow Text Messages:** No
- Allow Email:** No
- Recent Activity:** Cardholder Demo Tester has enrolled in study Demo Study with status Enrolled. Created new subject Demo Tester.

On the right side, there is a section titled 'ASSIGN CLINCARD' with a list of actions: 'REQUEST PAYMENT' (highlighted in yellow), 'REQUEST REIMBURSEMENT', 'CREATE TRAVEL PROFILE', 'EDIT SUBJECT', and 'SCHEDULE APPOINTMENT'.

2. Select the milestone the subject is being paid.
3. Add any Notes (not required).

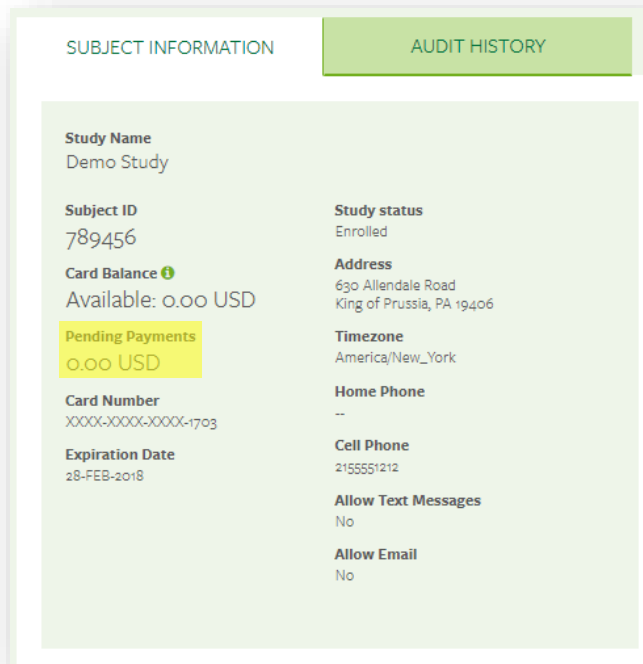


The screenshot shows a 'Request Payment' pop-up window. It contains the following fields and options:

- To:** Demo Tester
- Study:** Demo Study
- Milestone:*** Screening - 5.00 USD (selected)
- Total Payment:** 5.00 USD
- Notes:** A text area for adding notes.
- Buttons:** PAY (highlighted in yellow), MISSED, N/A, and CANCEL.

4. Click **Pay**.

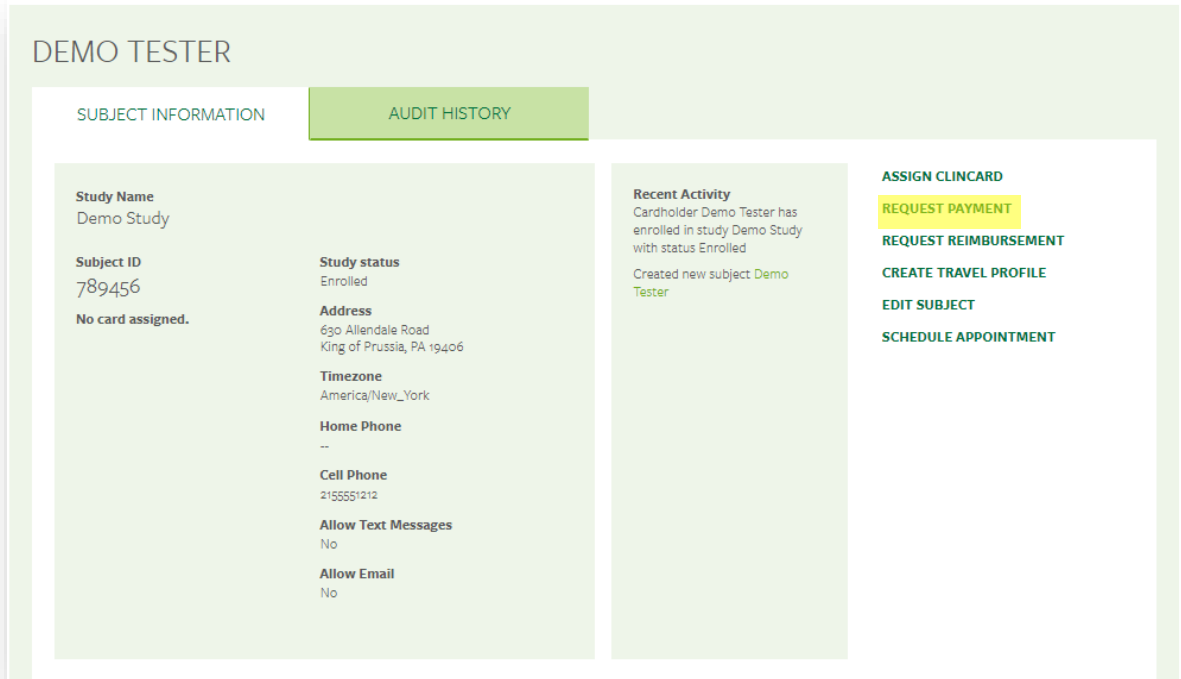
- a When a payment has successfully been requested, the “Pending Payments” area of the “Subject Information” screen will reflect the payment. It will also be reflected in your “Recent Activity” in the middle of the screen.
- b When a payment has been approved and processed, the amount will be removed from the “Pending Payments” area and will now be reflected in the “Card Balance” area.



- 5. If the Subject has opted to receive email and/or text messages, the Subject will receive a payment confirmation communication

Make a Miscellaneous Payment

1. Click **Request Payment** and a pop-up screen will appear



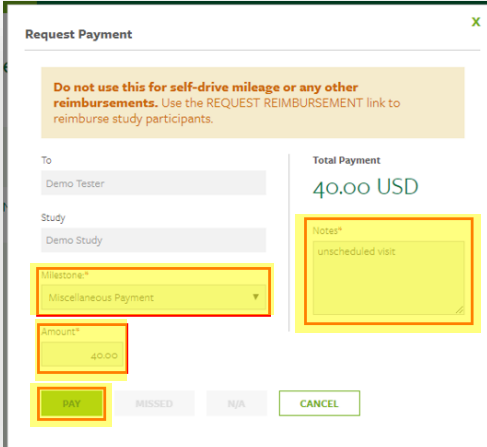
The screenshot shows the 'DEMO TESTER' subject information page. It has two tabs: 'SUBJECT INFORMATION' and 'AUDIT HISTORY'. The 'SUBJECT INFORMATION' tab is active and displays the following details:

- Study Name:** Demo Study
- Subject ID:** 789456
- No card assigned.**
- Study status:** Enrolled
- Address:** 630 Allendale Road, King of Prussia, PA 19406
- Timezone:** America/New_York
- Home Phone:** --
- Cell Phone:** 2155551212
- Allow Text Messages:** No
- Allow Email:** No
- Recent Activity:** Cardholder Demo Tester has enrolled in study Demo Study with status Enrolled. Created new subject Demo Tester.

On the right side, there is a list of actions under the heading 'ASSIGN CLINCARD':

- REQUEST PAYMENT** (highlighted in yellow)
- REQUEST REIMBURSEMENT
- CREATE TRAVEL PROFILE
- EDIT SUBJECT
- SCHEDULE APPOINTMENT

2. Select **“Miscellaneous Payment”** in the milestones drop-down menu.
3. Enter the payment value in the **“Amount”** field.
4. Add an appropriate comment in the **“Note”** field, e.g., **Unscheduled Visit**, etc.
5. Click **Pay**.



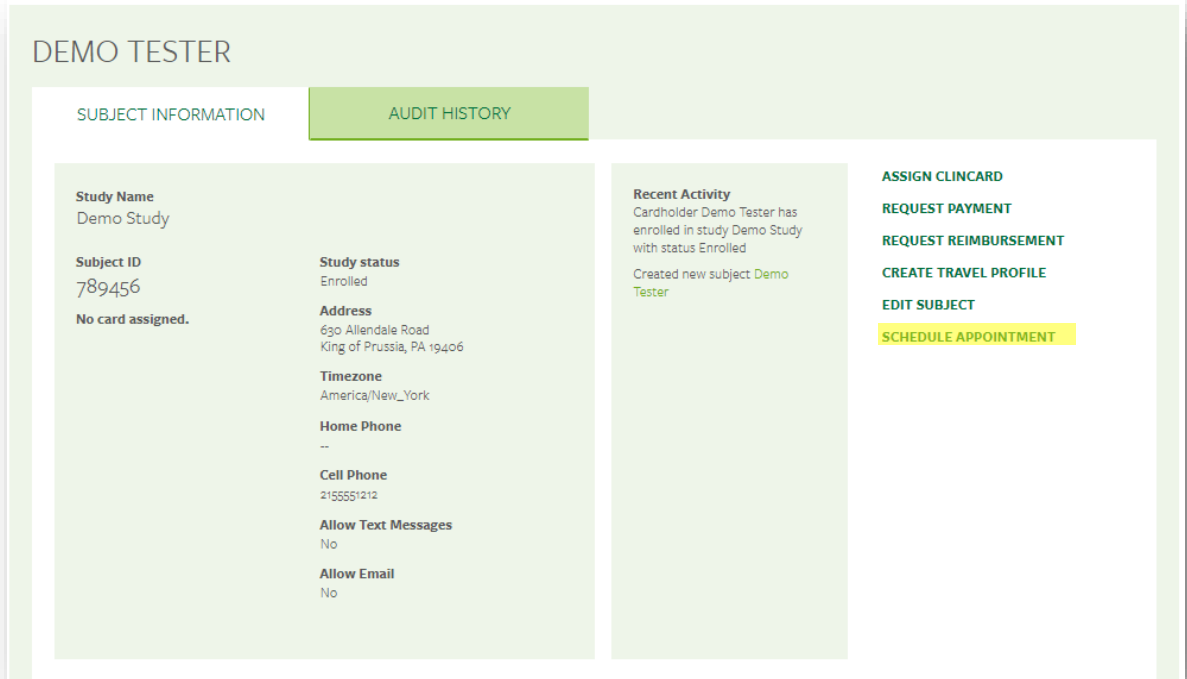
The 'Request Payment' pop-up form contains the following fields and options:

- To:** Demo Tester
- Study:** Demo Study
- Milestone*:** Miscellaneous Payment (highlighted in yellow)
- Amount*:** 40.00 (highlighted in yellow)
- Total Payment:** 40.00 USD
- Notes*:** Unscheduled visit (highlighted in yellow)
- Buttons:** PAY (highlighted in yellow), MISSED, N/A, CANCEL

A warning message at the top states: "Do not use this for self-drive mileage or any other reimbursements. Use the REQUEST REIMBURSEMENT link to reimburse study participants."

Setup an Appointment Reminder

1. Click **Schedule Appointment** and a pop-up menu will appear.



DEMO TESTER

SUBJECT INFORMATION AUDIT HISTORY

Study Name
Demo Study

Subject ID
789456

No card assigned.

Study status
Enrolled

Address
630 Allendale Road
King of Prussia, PA 19406

Timezone
America/New_York

Home Phone
--

Cell Phone
2155551212

Allow Text Messages
No

Allow Email
No

Recent Activity
Cardholder Demo Tester has enrolled in study Demo Study with status Enrolled
Created new subject Demo Tester

ASSIGN CLINCARD

REQUEST PAYMENT

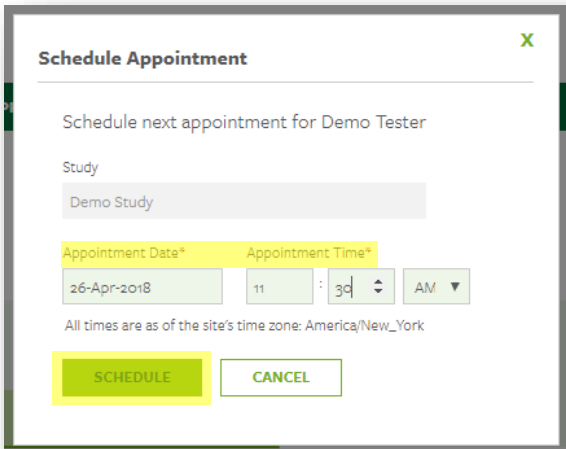
REQUEST REIMBURSEMENT

CREATE TRAVEL PROFILE

EDIT SUBJECT

SCHEDULE APPOINTMENT

2. Use the date and time picker to enter the Subject's next appointment.
3. Click **Schedule**



Schedule Appointment X

Schedule next appointment for Demo Tester

Study
Demo Study

Appointment Date* Appointment Time*

26-Apr-2018 11 : 30 AM

All times are as of the site's time zone: America/New_York

SCHEDULE CANCEL

4. The appointment has been stored and will appear at the bottom of the "Subject Information" screen under the header "Upcoming Appointments".

Upcoming Appointments Time zone: America/New_York

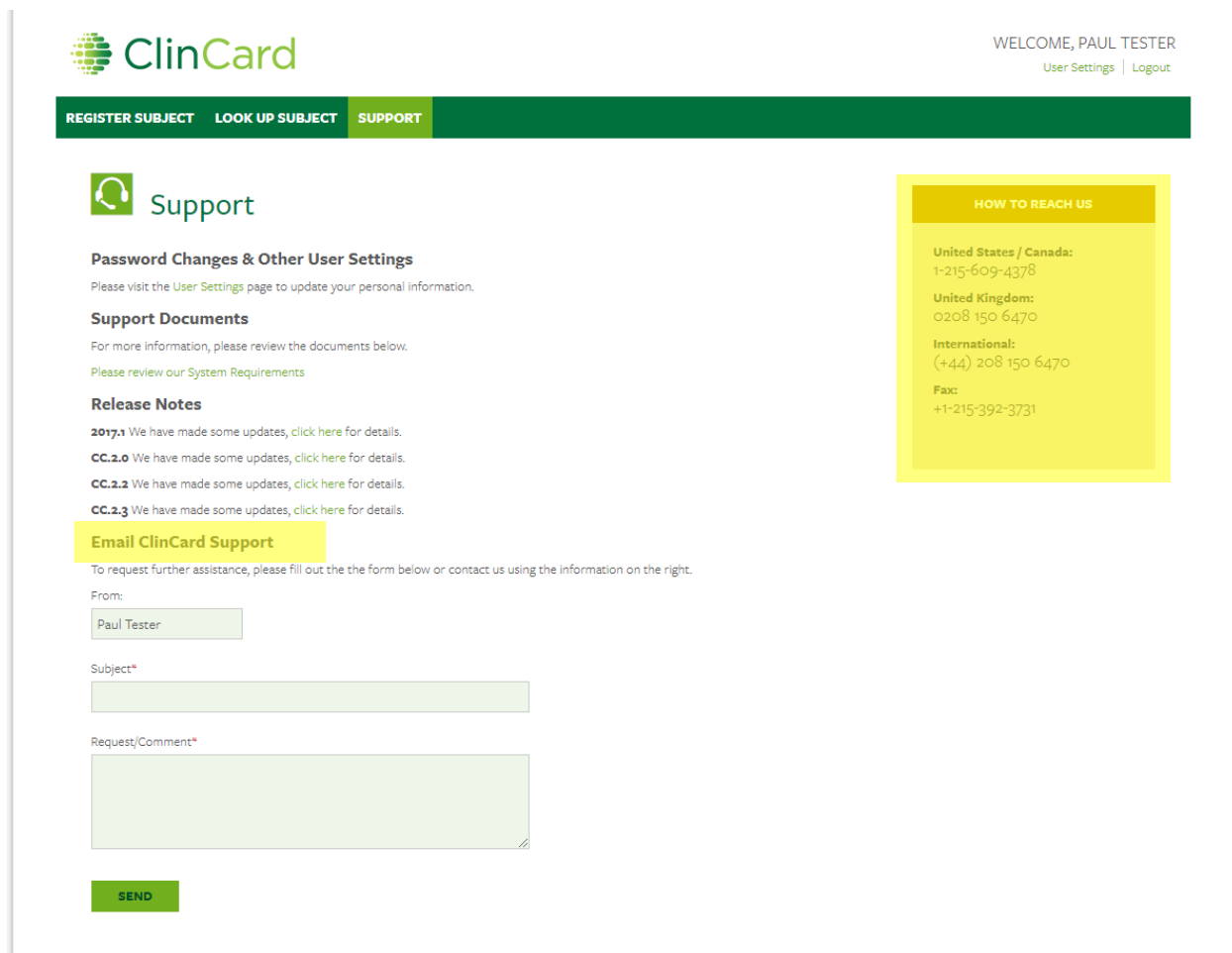
DATE	DAY	TIME	STUDY	SCHEDULED BY	
26-APR-2018	Thursday	11:30 AM	Demo Study	Paul Tester	CHANGE CANCEL

- a If the Subject has opted to receive email and/or text messages, they will receive a communication reminder three day and one day prior to the Subject's next appointment.

Request Assistance

If you have questions about using ClinCard or how it has been set up for your studies, reach out to the ClinCard Site Success team:

1. Submit an email request through the “Support” link on the ClinCard portal.
2. Email us at support@greenphire.com.
3. Call our Site Success team between the hours of 4:00AM and 10:00PM EST (Monday through Friday)
 - a. Local United States/Canada (215) 609.4378
 - b. Toll Free (844) 847.0107



The screenshot shows the ClinCard user interface. At the top left is the ClinCard logo. At the top right, it says "WELCOME, PAUL TESTER" with links for "User Settings" and "Logout". Below this is a navigation bar with three tabs: "REGISTER SUBJECT", "LOOK UP SUBJECT", and "SUPPORT" (which is highlighted). The main content area is titled "Support" with a headset icon. It contains several sections: "Password Changes & Other User Settings" with a link to the User Settings page; "Support Documents" with a link to System Requirements; and "Release Notes" with links for versions 2017.1, CC.2.0, CC.2.2, and CC.2.3. A yellow box highlights the "Email ClinCard Support" section, which includes a form with fields for "From:" (pre-filled with "Paul Tester"), "Subject*", and "Request/Comment*", and a "SEND" button. To the right of the form is a yellow box titled "HOW TO REACH US" containing contact information for the United States/Canada, United Kingdom, International, and Fax.