Greenphire Welcome Information Sheet

ClinCard is a reloadable prepaid debit card available as an alternative to study teams to provide a simple, secure, and fast way to disburse study participant payments and reimbursements. The ClinCard portal helps automate, track, and report on incentive payments across all studies, and stay compliant with tax law and HIPAA regulation.

Greenphire Program Steps

1. Add Greenphire as a payment option in eIRB: Instructions for adding the ClinCard program as a payment type in eIRB are on the IRB website (JHM - Procedures for Paying Research Participants (hopkinsmedicine.org)). Since it is one of multiple permitted mechanisms, we are not currently planning to update the consent form template, although that may change in the future if the options become more restricted. The approach is to update eIRB to add this as an option and to get approval to distribute the information sheet (also on the IRB website above) to participants who agree to use ClinCard for their payments.

2. The Department or Division will need to identify two or more Coordinators for each study participating. Each study participating requires at least a primary and secondary (back up) coordinator assigned to the study. In this role, the Study Coordinator(s) will:
   i. Register study participants in Greenphire, and assign physical/plastic or virtual ClinCards to the same
   ii. Initiate established Milestone incentive payments or miscellaneous incentive payments to study participants
   iii. Submit variable study and travel reimbursements
   iv. Access departmental/divisional study-level reports with exception of 1099

3. In parallel, the Department or Division will need to identify a financial approver for all teams within that Department or Division planning to use Greenphire. Guidance on the financial approver follows: The ClinCard Financial Approver must have Department or Division level financial authority for the business unit and visibility of the portfolio. Each Department or Division requires a primary and secondary (back up) approver assignment. Examples of appropriate position authority include: Administrator, Assoc. Administrator, Asst. Administrator, DOF, Financial Manager, and Grants & Contracts Manager. In this role, the ClinCard Financial Approver will:
   i. Review, approve and forward departmental/divisional ClinCard access requests to ClinCard Administrator for study/user creation
   ii. Approve variable study and travel reimbursements
   iii. Access departmental/divisional study-level reports with exception of 1099

4. Both the study team (the two or more persons who will be processing these payments) and the financial approvers should review and familiarize themselves with the documents at: ClinCard Training Resources.

5. The financial approver(s) will need to validate that any *sponsored* Internal Order selected for the study have the following Sponsored Classes included and available: **630000** (Supplies & Materials [Pat Incent]), **641007** (Patient Subject Expenses), and **643000** (Other Expenses Excluded [fees]).

When all of those steps are completed, you can reach out to ClinCardAdmin@jh.edu naming your people (coordinators and financial approvers), asking for access to Greenphire, and requesting the form that you will need to fill in for setting up a specific study in Greenphire (that form will be filled out by the coordinator, approved by the financial approver and then sent to the ClinCardAdmin email address).

[includes attachments "**Instruction Sheet for Study Teams for Greenphire_10262021**" pdf, "**Greenphire CC Ref Guide**" pdf, "**ClinCardFastFactsPresentation**" pdf]