

GREENPHIRE

A Quick How To Guide

WHAT IS GREENPHIRE?

- Greenphire is the name of the vendor that provides the participant payment system here at UAB.
- The system uses reloadable ClinCards to pay both clinical and research study participants.
- All studies and their associated payment schedules will be pre-loaded into the web-based Greenphire system.
- Designated users can log into the Greenphire system and add participants and make payments onto reloadable debit cards.

THE APPLICATION

UAB Greenphire ClinCard New Study Application

Study Name (lim to 250 characters): _____

IRB Number: _____ Acct Number: _____

PI Name: _____ Study's Organization Code: _____

ClinCards needed for study: _____ Projected Study End Date: _____

Study Sponsor: _____

PI's Signature: _____ Date: _____

Accountant Signature: _____ Date: _____

Study Staff and Responsibilities					
Name	E-mail	Phone	Study Coord	Approver	Reports

Study Payment Schedule (Examples: Visit 1, Initial Screening, V4, Interview, etc.)

Description: _____ Amount: _____

Description: _____ Amount: _____

Description: _____ Amount: _____

- Study Name: Name of your study
- PI: Principal Investigator
- IRB Number: Application number from IRB (must have IRB approval)
- Account Number: Funding source where payments will be coming from
- Organization: Org of PI (SON: Family or Acute)
- Number of cards needed for study
- Projected Study End-date
- Signature of PI
- Accounting Signature: Central Accounting ONLY
- Roles of Team:
 - Study Coordinator – person entering payments
 - Approvers – will always be Grace or Suzanne
 - Reports – can be anyone

SSN EXEMPTION

Application for Exception to Research Participant Payment Requirements

Federal regulations require that UAB obtain Social Security Numbers (SSNs) for all individuals paid for study participation to comply with IRS 1099 reporting requirements. For this reason, all participant payments must be made via the Greenphire system or UAB check, and must collect participants' SSNs. Any exception to this requirement must be approved in advance by central administration.

The information below should be provided for studies requesting an exception to this requirement. It is understood, however, that every effort will be made to obtain SSNs from every participant possible, even if the study exemption is granted.

Study Title: _____

IRB Number: _____

Account Number: _____

PI: _____

School/Department: _____

Maximum \$ possible to be paid to each participant: _____

Indicate the reason for the exception request:

☐ Entire study takes place in a foreign country

☐ Entire study population is non-resident (NRAs) aliens living in this country

☐ Significant % of participant population is expected to be NRAs living in this country

(Out of _____ expected participants, we project that _____ of them will not have SSNs)

☐ Other (Please explain):

By signing below, I am verifying that every effort will be made to obtain SSNs from participants and that the only reason one will not be obtained is for the reasons noted above.

PI Signature: _____ Date: _____

Chair Approval*: _____ Date: _____

*Department chair approval necessary only if required by School.

Dean's Office Approval: _____ Date: _____

Central Approval: _____ Date: _____

- In order to comply with IRS 1099 reporting requirements, UAB must obtain Social Security Numbers for all individuals paid for study participation.
- Form must be completed in entirety and signatures must be obtained from PI, Faculty Chair, and Dean's Office before being sent to Central Accounting for final approval.

ONCE YOUR APPLICATION IS DONE

- Trainings

Videos (login required)

- Greenphire Approver: How to approve a pending ClinCard payment for a study participant in the Greenphire system.
- Greenphire Site Coordinator: How to process a ClinCard payment for a study participant in the Greenphire system.

- Financial Affairs Website

- Home → Accounting → Subject/Participant Incentives

LOGGING IN

- A specific username will be assigned from Central Accounting along with a temporary password once the application is processed
- Greenphire will also send an email with upcoming trainings after noticing that you are a first-time user.

ENROLLING A PARTICIPANT

The screenshot shows the ClinCard web application interface. At the top, there is a green header with the ClinCard logo and three navigation tabs: 'REGISTER PARTICIPANT', 'LOOK UP PARTICIPANT' (which is highlighted), and 'SUPPORT'. Below the tabs, the 'Look Up Participant' section features a magnifying glass icon and the title. A 'Study' dropdown menu is set to 'All Studies'. A note states, 'Only studies with registered participants are displayed.' Below this, there are input fields for 'Name', 'Subject ID', 'Initials', 'Participant Email', and 'Last 4 Digits of ClinCard'. A green 'SEARCH' button is positioned below the email field. At the bottom of the page, a support section provides contact information: 'Support: US Toll Free: 1-844-847-0107 | US/Canada: (+1) 215-609-4378 | International Numbers Listing | For web support, visit: support.greenphire.com'.

- Before enrolling a new participant, ALWAYS look them up
- Participants must be enrolled in 00-ALL STUDY-UAB before being enrolled in your study
- All participants must have first and last name, physical address, DOB, and Social Security number (SSN – required unless exemption has been approved for study)

REGISTRATION



Participant Registration

To begin the registration process, please select a study *

oo - ALL STUDY - UAB

Study Status *

Enrolled

Subject ID

Site *

UAB All Study (Central)

Name

First Name *

Middle

Last Name *

Initials *

Tax Identification Number (TIN) ⓘ

Address

Country *

United States

Search for an address. *

Begin typing to find an address

Personal

Timezone *

US/Central (CDT)

Language

English

Date Of Birth *

ex: 31-OCT-1952

Participant Email Address

ex: name@example.com

☐ Enable Email Alerts

Participant Cell Phone

ex: 215-555-1212

☐ Enable Text Messaging

REGISTER

- If you attempt to enroll a participant without having a SSN/TIN, you will not be able to proceed. You will receive an error message.
- Participants have the option of receiving an email or text notification when funds are loaded to card along with reminders for follow up appointments
- Participants must have a Subject ID when being enrolled in your specific study. No Subject ID is required when enrolling in 00-ALL STUDY-UAB

ADDING TO STUDY

► How to Register a Subject in an Additional or Extension Study

- 1) Locate the existing “Subject Information” page through the “Look Up Subject” menu tab and clicking on the last name of the subject to open the participant’s subject information tab. (If you have just enrolled the subject in the 00-ALL STUDY UAB, you should be on the correct page.)
- 2) Click on the **Edit Subject** option in the list to the right

Look Up Subject

2 Buttons to display details

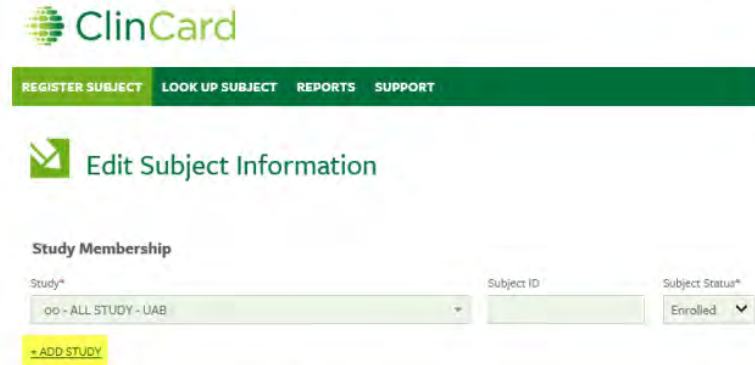
DONALD P. MONTGOMERY

SUBJECT INFORMATION		AUDIT HISTORY
Study Name 00 - ALL STUDY - UAB	Study status Enrolled	Recent Activity Cardholder: Montgomery Has enrolled in study 00 - ALL STUDY - UAB with status Enrolled Created new subject Montgomery
Subject ID —	Address —	
No card assigned.		

ASSIGN CLINICARD
MAKE SITE VISIT PAYMENT
TRAVEL REIMBURSEMENT
MANUAL SUBJECT PAYMENT
EDIT SUBJECT
SCHEDULE APPOINTMENT

ADDING TO STUDY

- 3) Click on the **Add Study** link located under the list of the subject's current study(ies)



and select your study from the drop-down menu



- 4) Enter the new **Subject ID** (this should be specific to your study) and enter or select the **Subject Status**.

Edit Subject Information

Study Membership for UAB All Study (Central)



- 5) Scroll to the bottom of the page, and click "Save."

This will enroll the subject in your study in addition to the 00-ALL STUDY UAB in which all subjects must be enrolled, first.

ASSIGNING A CLINCARD

Once you have selected an existing subject or registered a new subject, the “Subject Information” screen will open. On the right hand side of the screen, you will see options that represent all of the actions you can perform on the Subject.

Note: If the subject already has a ClinCard assigned, you should not assign another card. (You can tell the subject already has a ClinCard if the first option in the list of options to the right-hand side of the screen is “Replace ClinCard” instead of “Assign ClinCard.”)



Look Up Subject

[Return to search results](#)

RACHEL TAYLOR

SUBJECT INFORMATION

AUDIT HISTORY

Study Name

00 - ALL STUDY - UAB

Subject ID

Study status

Enrolled

Participant Code

Address

345 Pine Mountain Road
Tomball, AL 35073

No card assigned.

Timezone

US/Central

Home Phone

—

Recent Activity

Changed Rachel Taylor subject information.

Cardholder Rachel Taylor has enrolled in study 31800000 - 201907-15923001 as Subject ID 6F0079 with status Enrolled.

Changed Rachel Taylor subject information.

ASSIGN CLINCARD

REQUEST PAYMENT

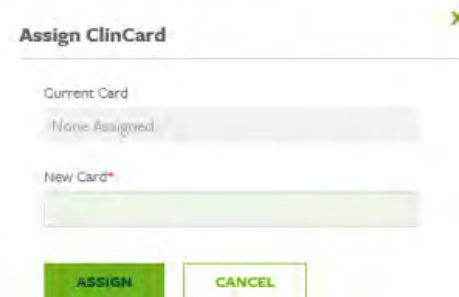
REQUEST REIMBURSEMENT

EDIT SUBJECT

SCHEDULE APPOINTMENT

ASSIGNING A CLINCARD

- 1) Click on "Assign ClinCard" and a pop-up screen will appear.



- 2) In the "New Card" field, enter the 8-digit token number visible through the window of one of the ClinCard card packages you received.

Note: There is no need to open the envelope prior to providing to the Subject.



- 3) Click on the "Assign" button
- 4) Once the card has successfully been assigned, you will receive a confirmation message at the top of the "Subject Information" screen

ASSIGNING A CLINCARD

Success! The new card has been successfully assigned to Rachel Taylor. The new card will be active within 10 minutes.

Look Up Subject

Search by name, ID, or token

RACHEL TAYLOR

SUBJECT INFORMATION AUDIT HISTORY

Study Name DO-ALL STUDY - UAB	Subject ID —	Study status Enrolled	Address —
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Recent Activity

- Assigned card X-9111 to Rachel Taylor
- Changed Rachel Taylor's subject information
- Cardholder Rachel Taylor has completed 100% of the study

- REPLACE CLINCARD
- REQUEST PAYMENT
- REQUEST REIMBURSEMENT
- EDIT SUBJECT
- SCHEDULE APPOINTMENT

- 5) Now an option to “Replace ClinCard” appears. In the event that a subject loses their card, you can replace that card for them by clicking on “Replace ClinCard,” and follow the steps above, using the 8 digit token number from a new ClinCard card package

Note: This will inactivate the lost card and automatically transfer any available/pending balance to the newly assigned ClinCard

REQUESTING PAYMENT FOR A SUBJECT

VENUE CLINICAL TRIALS

RACHEL TAYLOR

SUBJECT INFORMATION AUDIT HISTORY

Study Name
311600000 - 2013127 - 131223001

Recent Activity
Assigned card X-clip to Subject

REPLACE CLINICARD
REQUEST PAYMENT
REQUEST REIMBURSEMENT

- 2) Click on "Request Payment" and a pop-up screen will appear

Request Payment

To:
Rachel Taylor

Study*
311600000 - 2013127 - 131223001

Milestone*
--SELECT MILESTONE--

Total Payment
0.00 USD

Notes

CANCEL

- 3) Select from the dropdown box which milestone the patient is being paid, e.g., Visit 1, Visit 2, etc.

Request Payment

To:
Rachel Taylor

Study*
311600000 - 2013127 - 131223001

Milestone*
Screening: 50.00 USD
--SELECT MILESTONE--
Screening: 50.00 USD
Troubleshoot 1: 15.00 USD
Troubleshoot 2: 15.00 USD

Total Payment
50.00 USD

Notes

CANCEL

REQUESTING PAYMENT FOR A SUBJECT

4) Click on the "Pay" button.

Request Payment

To: Rachel Taylor

Study*: 311600000 - 2013127 - 131223001

Milestone*: Screening: 50.00 USD

Total Payment: 50.00 USD

Notes:

PAY MISSED N/A CANCEL

5) Once the payment has successfully been requested the "Pending Payment" area of the "Subject Information" screen will reflect the payment. It will also be reflected in your "Recent Activity"

SUBJECT INFORMATION **AUDIT HISTORY**

Study Name: 00 - ALL STUDY - UAB

Subject ID:

Study status: Enrolled

Participant Code:

Address:

Card Balance: Available: 0.00 USD

Pending Payments: 50.00 USD

Timezone: America/New_York

Home Phone:

6) Once a payment request has been approved and processed, the amount will be removed from the "Pending Payment" area and reflected in the "Available Balance" area

QUESTIONS???

