PURPOSE and SCOPE:
The purpose of this policy is to describe the requirements and procedures for the establishment and use of the Greenphire ClinCard. This document applies to all research studies using the Greenphire ClinCard for research subjects/participants.

This document is not a user guide. For specific guidance for using the ClinCard system refer to ClinCard: Using the ClinCard System.

INTRODUCTION:
The Greenphire ClinCard program has been established to provide an efficient alternative for study teams to provide compensation and reimbursements to study subjects participating in Brown’s IRB-approved studies. The ClinCard is a reloadable prepaid card available to research coordinators as a payment option for human subjects. The ClinCard allows for direct, on-site disbursement which helps to increase participant retention. The card offers a faster and safer method of paying your study participants and will provide an excellent alternative to AP checks, gift cards, and petty cash. In addition, Greenphire supplies a convenient administrative tool for loading, tracking, and reporting your studies’ payments.

BENEFITS:
- Direct, on-site disbursement to study subjects
- Reduced payment administration
- Improved funds workflow security/approval
- Enhanced processing/tracking/reporting
- Increased participant retention
- Central accounting and tax reporting support

COST:
ClinCards cost $3.90 per card. The card can be used by a participant for three years and can be used for multiple payments as well as another study.

Each payment/load costs $1.15.

CLINCARD ROLES and RESPONSIBILITIES:
The following are ClinCard defined roles. These role names may differ from the functional job titles of the system users.

- **Administrators:** Accounts Payable will upload the studies into the ClinCard portal and upload the payment schedules. Upon loading the studies into the portal, Accounts Payable will assign studies to the designated Research Coordinators. By keeping the Administrator permission
limited, other users will not be able to edit the study and/or the study budget. Accounts Payable also maintains the unassigned inventory of ClinCards.

- **Approvers:** Approvers are designated at the study level to approve payments. The team for each study will determine who they want to have Approver access. The Coordinator that schedules the payment cannot be the same person that approves the payment.

- **Coordinators:** Coordinators will have access to all of their designated studies. They will be responsible for registering subjects into the ClinCard system, assigning ClinCards, as well as submitting payments to the subjects. Prior to registering a subject, they should search the “ALL” study to ensure the subject is not already set up. (Access to “ALL” does not provide access to study details, just the names of individuals who are receiving ClinCard payments.

- **Report Viewing:** Report viewing is available at the Administrator/University level, or it may be limited to a Study-Specific level. When report viewing is provided at a study level, users will only receive data that pertains to their designated studies; therefore, they will be unable to view reports that includes other study data.

**CLINCARD REQUEST**

Before submitting a request for your study be set up in Greenphire, please consider the following with your team:

- Who will be the main contact for the study and submit the online request? (This person must be a Cost Center Manager and/or Grant Manager)
- Who will need access to Greenphire, and what kind of access does each person need: Coordinator, Approver, Reports?
  - The person that loads the payment cannot be the same person that approves the payment. Study Coordinators typically load the payments.
  - We encourage each Department to develop a plan for the approval process for all studies in ClinCard before submitting a study in the online request.

**Procedures**

1) The main contact for the study submits a request form for ClinCard payments. You will be asked for the following information:

**User Information**
- Name of Requestor
- Name of Study Coordinator
- Name of Approver
- Name Reports

**Request Details**
- Principal Investigator (PI)
- IRB protocol number
- Study Name
- Number of ClinCards needed (you do not need to order cards for the entire duration of the study: you can replenish cards as the study progresses)
- Subject payment budget
- Duration of study (beginning and end date)
- Payment schedule throughout the study
- Accounting Worktags
Please enter the period of time that your study team plans to process payments for the study, from your first payment to the first patient until the last payment to the last patient. We will never close a study until we confirm with the main contact. To prevent fraud, we want to make sure studies do not stay open longer than necessary, especially if they have money available in their budget.

Accounts Payable front-loads the money to pay your subjects. We charge each study/department (using the worktags you supply us) via a journal entry one month in arrears. In Greenphire, one study is linked to one series of worktags. If you have multiple worktags, you need to set up multiple studies. The study nickname can be used to help you differentiate between studies/budget codes. You must submit a separate request for each study.

2) Accounts Payable Review

Accounts Payable reviews the ClinCard request, ensuring the user information and request details are complete and appropriate. Accounts Payable will confirm the study details via email to the Principal Investigator, Requestor and Study Coordinator.

3) ClinCards

Accounts Payable disburses ClinCards and manages the ClinCard inventory. Research Coordinators will receive an email when ClinCards are ready for pick-up. ClinCards are picked up in Accounts Payable, 4th Floor, South Street Landing. The Coordinator will sign an acknowledgment form with the last 4 digits of the cards picked up at the time of pick-up. ClinCards expire after three years.

4) ClinCard System Access

Accounts Payable creates the study in the ClinCard and assigns appropriate access level. Once ClinCards are picked-up access will be granted to the ClinCard system and an email notification will be sent to Research Coordinator containing access information. If this is your first study we will set you up with user access and you will receive an email from Greenphire, the ClinCard parent company, with your user ID and instructions on how to log in.


CARD SECURITY AND RECORD KEEPING REQUIREMENTS

Once you pick-up your ClinCards, you are responsible for their safekeeping.

- Keep the ClinCards that have not yet been distributed to subjects/participants in a secure location, such as a locked draw or safe, and limit the number of people who have access to them (one person per study is strongly recommended).
- Maintain a ClinCard log that lists cards picked-up and cards issued.
- Do not photocopy the ClinCards.
- Do not share the ClinCard system log-in information with anyone.
LOST OR STOLEN CARDS
If a participant loses their card or has their card stolen, and they are still an active member of a Brown University study, they should contact their Study Coordinator immediately. The Coordinator will be able to cancel the original card and reissue them a new one. Any funds on the original card that were fraudulently removed/spent cannot be replaced. If the Study Coordinator needs to order a new card from Accounts Payable, the study will be charged for the card.

If the participant calls Greenphire/the bank directly, they will pay a $7 replacement fee which is deducted from the available balance.

TAX INFORMATION AND YEAR END 1099
Compensation for participating in a study is taxable income. Social Security numbers are not required when registering a participant in the ClinCard system. However, if an individual’s cumulative payments are $600 or more in a calendar year, a Social Security number will be necessary as Brown is required to issue the participant a Form 1099. Accounts Payable monitors payment totals and will notify Study Coordinators when social security numbers are required.

RESOURCES
- CLINCARD SYSTEM REQUEST FORM
- CLINCARD: USING THE CLINCARD SYSTEM