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Ensure your  
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Handouts: 1

Training Handout.pdf

Questions

[Enter a question for staff]

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Screenshot

Webinar ID: 873-688-707

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# Greenphire ClinCard Participant Payment Solution

University of Cincinnati & UC Health

*The presentation will start shortly!*

Use the 'Questions' box at any time



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Please complete the survey at the end of the training

The session will be recorded and distributed later today



A graphic of a dense, branching red structure, resembling a network or a tree, set against a black background. The branches are thin and numerous, with a few thicker, more prominent ones extending towards the right side of the frame.

**Office of Clinical Research  
Lunch & Learn**

**Greenphire ClinCard Participant Payment Solution**

**Thursday, June 16<sup>th</sup>, 2022**

# June 2022 Study of the Month #1

## Do you have Depression with Sleep Problems?

Are you currently taking an antidepressant?

### What

A research study to evaluate the safety and effectiveness of an investigational medicine in people who have depression with sleep problems.

### Who

Adults 18-74 with depression who are currently taking an antidepressant medication, and are experiencing difficulty falling asleep or staying asleep, or do not feel rested the next day.

### Pay

Participants will be paid \$52 per visit for time and travel costs related to the study.

### Details

For more information, contact Emily Rummelhoff at (513) 558-4295 or [Emily.rummelhoff@uc.edu](mailto:Emily.rummelhoff@uc.edu).

 **Health.**

23-21 888 # 2020-0595



# June 2022 Study of the Month #2

## Do You Have Anxiety?

### Anxiety Study for Adults

#### What

The purpose of this clinical research study is to evaluate which patients respond best to which medication treatment for anxiety and to understand long-term recovery from anxiety disorders.

#### Who

Adults 18 to 50 years old may be eligible to participate. Common anxiety symptoms include uncontrollable worrying, restlessness, discomfort in social situations, irritability, panic attacks, and sleep difficulties.

#### Pay

Participants will receive payment for time and travel for each completed study visit. All study visits, tests, procedures, and medication will be provided at no cost to participants.

#### Details

For more information, please contact Ashley Specht at 513-558-2868 or [huckabam@mail.uc.edu](mailto:huckabam@mail.uc.edu) or Heidi Schroeder at 513-558-4422 or [heysehk@mail.uc.edu](mailto:heysehk@mail.uc.edu).



## **Informed Consent Form (ICF) for Research upload to EPIC** **UPDATE:**

The workflow for upload of signed informed consent forms (ICFs) was recently updated with a common mailbox to which PDFs of scanned ICFs could be sent for upload.

### **UPDATE:**

- Due to security issues, the mailbox ([UCMC-Scanning@UCHealth.com](mailto:UCMC-Scanning@UCHealth.com)) is no longer being monitored, nor active as of June 3<sup>rd</sup>, 2022
- **Any documents to be scanned/uploaded into the patient's medical record must be faxed to the appropriate fax number:**
  - **UCMC:** 513-584-4295
  - **WC Hospital:** 513-298-7981
  - **WC Hospital Based Clinics:** 513-298-7988
  - **Daniel Drake Center:** 513-584-3543

## **New Resource: UC Regulatory Channel:**

This chat channel was created with the goal of unifying the regulatory communities and specialists at UC/UCH. There are many ways of handling regulatory duties, and this chat is designed to create an open community where any question, suggestion, or inquiry is welcomed. This channel will can provide the following to all who join:

- Aid or advice to new regulatory staff members at UC/UCH
- Potential demo/training opportunities of new systems, regulatory procedures, or submissions
- Discussion or feedback relating to regulatory submissions/approval processes for studies using UC IRB, CIRBs, or external IRBs
- Sharing of regulatory guidance documents and knowledge as it relates to FDA/ICH guidelines or OCR/IRB SOPs and Policies
- A way for regulatory staff to unify and share ideas or create innovative workflows aiding the regulatory processes

For anyone interested in joining this chat channel, please send an email to Kalen Butcher ([butchekn@ucmail.uc.edu](mailto:butchekn@ucmail.uc.edu)) to be added or have your team members added.



# SOCRA CRP CERTIFICATION EXAMINATION

## Hosted by CCHMC

### Tuesday, August 9<sup>th</sup>, 2022

Please visit the [SOCRA website](#) for more details.

**The Registration Deadline is Tuesday, June 28<sup>th</sup>, 2022**

[Register Here](#)

#### **Open review sessions hosted by CCHMC CRP:**

- Study Review Session 1: **Thursday, July 14, 2022, 10am:** [Click here to join the meeting](#)
- Study Review Session 2: **Friday, July 22, 2022, 1pm:** [Click here to join the meeting](#)

Both review sessions will contain the same content.

For any questions or further information, please contact the CCHMC CRP Group at [CRP@cchmc.org](mailto:CRP@cchmc.org) or Nate Harris at [harrisnl@ucmail.uc.edu](mailto:harrisnl@ucmail.uc.edu)



**The July 2022 First Friday is CANCELLED**  
**Due to the Holiday Weekend.**

**Enjoy your Independence Day / 4<sup>th</sup> of July Weekend!!!**



# **Today's Presentation:** **Greenphire ClinCard** **Participant Payment Solution**

UC/UC Health's preferred participant payment solution for clinical trials- ClinCard!

ClinCard is the industry standard in participant payment automation that eliminates the administrative burdens that can distract from the pursuit of research by allowing you to pay your participants with a few short clicks in the payment website.

ClinCard allows participants to receive their payments in a quick and easy way while providing a full audit history, for the coordinator's benefit.

**Lacey Kuberiet**  
**Team Lead, Product Training**  
**Greenphire Clinical Trial Finance Solutions**

**Greenphire ClinCard Participant  
Payment Solution  
University of Cincinnati  
&  
UC Health**

## UC Health (UCH) Greenphire and University of Cincinnati (UC) Greenphire Key Differences

### UC Health (UCH) Greenphire:

- For Historical Industry Sponsored Clinical Trials (**Prior to 7/1/2021**)
- Submissions are made to the UC Health Redcap submission system at the following link:
- [UC Health Greenphire Online Request Form](#)
- **PeopleSoft Account string**
  - Specifically the T-Number in the following format:
    - F00-0000-**T0000000**-000000000000-0000-00000-000

### University of Cincinnati (UC) Greenphire:

- Federally or Grant funded Research
  - **AND Industry Sponsored Clinical Trials (After 7/1/2021)**
- Submissions are made to
- [GreenphireClinCard@ucmail.uc.edu](mailto:GreenphireClinCard@ucmail.uc.edu)
- **UCFlex Account string:**
  - A minimum of a Fund# (seven digit with one alpha and six numeric)
    - Fund numbers can begin with alpha characters of A, D, E, F, or G. (G fund are for traditional grants and now also include the industry clinical trials contracted through UC.)
  - Cost Center (ten digit numeric only)
  - And Functional Area (one digit numeric only.)
    - **G000000-00000000000-0-0000000.**

## **UCH and UC Greenphire programs are separate, but both under the Global Greenphire platform:**

**One is NOT able to utilize the same user information (Email address specifically) for both programs**

### **If you have studies in both the UCH and UC Greenphire:**

- You will need separate email addresses in order to login to UCH and UC Greenphire
- It is recommended that a user with studies in both UCH and UC Greenphire:
  - Use your **UCH email address** for **UCH Greenphire**
  - Use your **UC email address** for **UC Greenphire**
    - Most CRPs and Coordinators are UC Employees
    - If you have studies in both UCH and UC Greenphire, but do not have a UCH email account, use the alias version of your UC email address as the second email address:
      - [parkerpb@ucmail.uc.edu](mailto:parkerpb@ucmail.uc.edu)
      - [peter.parker@uc.edu](mailto:peter.parker@uc.edu)

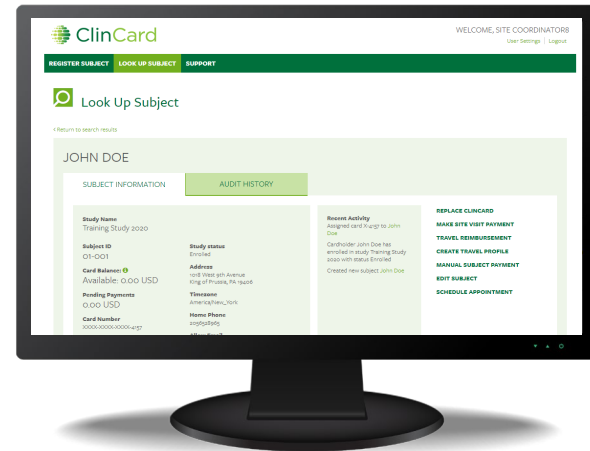
## Greenphire User Roles:

### User Roles:

- Coordinator
- Approver
- **In both UCH and UC Greenphire, it is not allowed for a single user to maintain both Coordinator and Approver roles for any one study**
  - Exceptions are made in rare circumstances for very specific reasons upon request.

# The ClinCard Solution

- Solution designed to help sites pay & reimburse participants more efficiently
- Reloadable debit card tied to an online portal that allows immediate payments to participants





# Sample ClinCard Packet



<Program Name: (data field 36-39)>  
<Token # (data field 51)>  
<Valued Cardholder>  
<Expiration Date: (data field 30)>

Questions? We're here to help!  
Live 24/7 Customer Service

Online:  
[www.consumercardaccess.com/myclincard](http://www.consumercardaccess.com/myclincard)

By Phone:  
1-866-952-3795

The card may be used anywhere  
Debit Mastercard is accepted.

## Get started with your ClinCard with these easy steps. The card may be used anywhere Debit Mastercard is accepted:

- 1 Your ClinCard Prepaid Mastercard<sup>®</sup> is active once registered to you. It can immediately be used once funds are loaded onto the card.
- 2 Your ClinCard does not come with a pre-set PIN. In order to use your ClinCard at an ATM location or to make a purchase using the "debit" option in stores, please call **1-866-952-3795** to set your PIN.
- 3 Your card can be used:
  - At any merchant that accepts Mastercard
  - For online purchases
  - To get cash at banks. Go to any Mastercard member bank and ask for an over the counter (bank teller) cash withdrawal for up to the total balance on your card
- 4 Please do not discard the prepaid Mastercard as this is a reloadable card and additional funds may be credited. The card is only reloadable by the program sponsor and as the cardholder, you do not have the ability to add additional funds to this card. Card funds do not expire.
- 5 You may view your available balance, review transactions and manage your card at [www.consumercardaccess.com/myclincard](http://www.consumercardaccess.com/myclincard) or by calling **1-866-952-3795**.



## Tips on using your ClinCard

- To make purchases, you may select "Credit" or "Debit". If you select Credit, you will be prompted for your signature. If you select Debit, you may be prompted to enter your PIN.
- Know your available balance when making a purchase
- Get balance updates online or at select ATM locations
- For use at fuel stations, a requested amount of your available balance should be provided to an attendant and not at the self-service pump
- As a prepaid card, your ClinCard can only be used for purchases up to the amount of your available balance. If your total is more than your card balance, pay the difference with another form of payment first and then use this card. Note that merchants are unable to check your balance or transaction history

## Important Card Information

- Sign the back of your card immediately
- Your card is NOT a credit card and does not build credit
- Always keep your card and PIN secure
- Monitor your account for suspicious activity
- Immediately report suspicious activity to Customer Service
- If you have forgotten your PIN or need to reset your PIN, please visit the cardholder website or call customer service and follow the prompts to retrieve and/or change your PIN
- The date which appears on your card is the expiration date. Once the card has expired, you must request a replacement to use the remaining balance. See provided FAQ for replacement process information

## ClinCard Admin

### In-Portal Permissions:

- Add Studies
- Edit Studies
- Manage Study Payments
- Manage Study Roles
- Create/Manage Users

*(optional - configured by GP)*

### Non-Portal Activities:

- Order ClinCards
- Manage card inventory
- Provide training to new user

### Reports Access:

- Program level - all studies  
(must be granted additionally)

## Study Coordinator

### In-Portal Permissions:

- Register participant
- Assign ClinCard
- Pay participant
- Schedule appointment reminders *(if applicable)*

### Non-Portal Activities:

- Request access to ClinCard through internal process
- Educate participants on the use of ClinCard

### Reports Access:

- Study level only – optional and must be granted additionally

## Approver

### In-Portal Permissions:

- Approve reimbursements & milestone payments

### Non-Portal Activities:

- Forward access requests to ClinCard Administrator for study/user creation  
(optional)

### Reports Access:

- Study level only – optional and must be granted additionally

## Reports

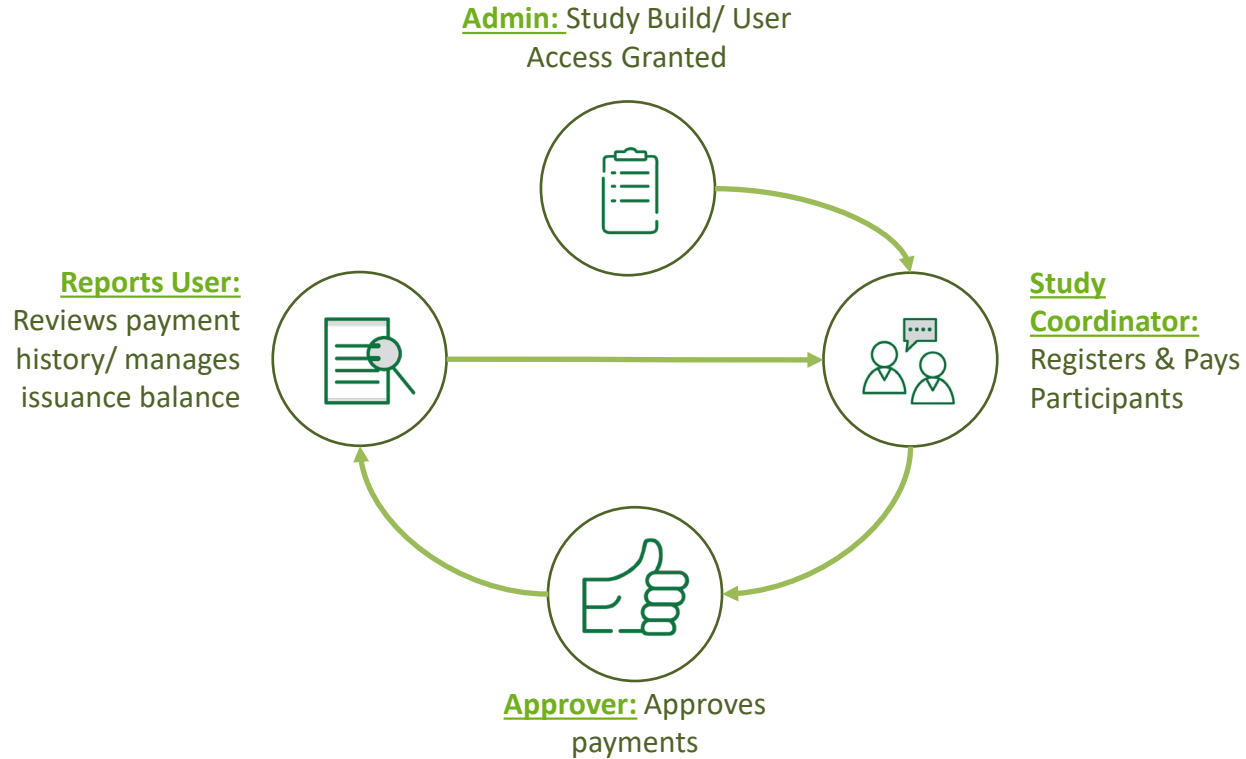
### In-Portal Permissions:

- View reports on payment info at a study level, or a program level- all studies + program balance report

### Reports Access:

- User's access must specify if it is 'study level' or 'program level'
- *Access to 1099 reporting must be configured by GP*

# How It Works



# Recurring Site Training Sessions

- New users will be invited to live instructor-led training which includes:
  - Detailed overview of ClinCard
  - Detailed demonstration
  - Q & A
- Recording will be sent to all attendees and those who registered but could not attend.
- Users can attend more than once
  - Links will continuously have dates added to them.

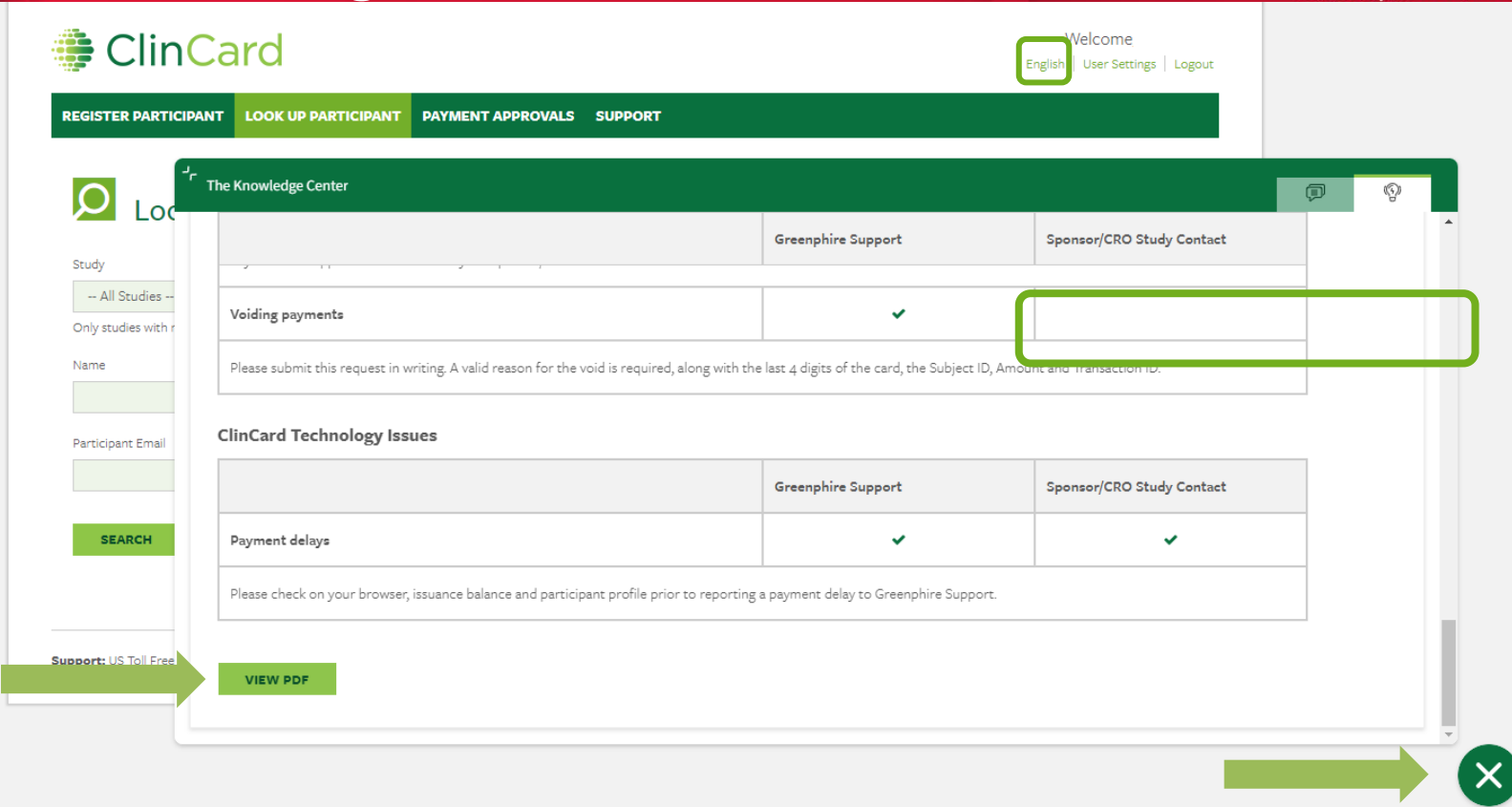


**Register Now!**

Click the button below to register for one of our upcoming sessions, open to both new and existing customers.

[Register Now](#)

Time	2 <sup>nd</sup> & 4 <sup>th</sup> Wednesday
1pm EST	ClinCard- Admins
3pm EST	ClinCard- Coordinators



The screenshot shows the ClinCard Knowledge Center interface. At the top, there is a navigation bar with the ClinCard logo on the left and a user profile area on the right containing a 'Welcome' message, 'English' language selection, and links for 'User Settings' and 'Logout'. Below this is a dark green navigation menu with four items: 'REGISTER PARTICIPANT', 'LOOK UP PARTICIPANT', 'PAYMENT APPROVALS', and 'SUPPORT'. The main content area is titled 'The Knowledge Center' and features a search sidebar on the left with fields for 'Study', 'Name', and 'Participant Email', along with a 'SEARCH' button. The main content is divided into two sections: 'Voiding payments' and 'ClinCard Technology Issues'. Each section contains a table with columns for 'Greenphire Support' and 'Sponsor/CRO Study Contact'. The 'Voiding payments' section has a green checkmark in the 'Greenphire Support' column and a red 'X' in the 'Sponsor/CRO Study Contact' column. The 'ClinCard Technology Issues' section has green checkmarks in both columns. A green box highlights the 'English' language selection, and another green box highlights the red 'X' in the 'Voiding payments' table. A green arrow points from the 'Support: US Toll Free' text to a 'VIEW PDF' button. A green arrow points from the bottom right towards a red 'X' icon.

English | User Settings | Logout

REGISTER PARTICIPANT | LOOK UP PARTICIPANT | PAYMENT APPROVALS | SUPPORT

The Knowledge Center

	Greenphire Support	Sponsor/CRO Study Contact
Voiding payments	✓	✗

Please submit this request in writing. A valid reason for the void is required, along with the last 4 digits of the card, the Subject ID, Amount and transaction ID.

**ClinCard Technology Issues**

	Greenphire Support	Sponsor/CRO Study Contact
Payment delays	✓	✓

Please check on your browser, issuance balance and participant profile prior to reporting a payment delay to Greenphire Support.

Support: US Toll Free

VIEW PDF

# Demo

# THANK YOU

