Quick Reference Guide

▶ How to Login to www.clincard.com

1) Visit www.clincard.com.
2) Enter your login and password as provided to you. Keep in mind that your login and password are case sensitive so make sure to use capital letters as necessary.
3) If you have difficulty logging into www.clincard.com, please click on the "Forgot username and password?" link, enter your email address, and click "Reset my password." This will instantly send you an email with a link allowing you to reset your password.
   Note: You can also email Research Business Information Systems (RBI@bmc.org) for user login assistance, or contact ClinCard site support at 215-609-4378.

▶ How to Search for and/or Register a Subject/Participant

I. Check if the Participant has already been registered in ClinCard:

1) Login to www.clincard.com
2) In the "Lookup Subject" screen, search for the Participant by filling out any of the following fields:
   a. First name and/or last name
   b. Subject ID
   c. Subject's initials
   d. Subject e-mail
   e. Last 4 digits of ClinCard

   [Note: All registered participants will be part of one central study named "1_BMC Participants"]
3) Click 'Search':
   a. If the participant **is not found**, continue to part II *'Register a new Participant…'* to register them in the central study "1_BMC Participants".
   b. **If found,** continue to part III *'Add a Study to a Registered Participant…'*

II. Register a **new** Participant in "1_BMC Participants":

1) Collect the completed ClinCard Participant Information Form (CPIF) from the Participant
2) Click on "Register Subject"
3) You will be brought to the 'Subject Registration Page'
4) Fill out the four fields at the top of the page :
   a. Subject ID : **If participant is registered in VelosCT, use the VCT # (helps reconciliation of payments and completed events); otherwise, fill in a generic study Subject ID (e.g. 'Participant Initials_001')**
   b. Study ID : **Choose the central study titled "1_BMC Participants"**
   c. Subject Status : **Select 'Enrolled'**
   d. Site: **Select 'BMC'**
5) Then complete the remaining participant demographic fields and click the 'Register' button:
   a. **Note:** If the Participant wants to receive payment confirmations or appointment reminders, be sure the "Email (Enable)" and/or "Text Messaging (Enable)" checkboxes are selected.
6) You will now add your specific study to the newly registered participant. See part III *'Add a Study to a Registered Participant…'* **steps 2-7**.

III. Add a Study to a Registered Participant

1) Once the participant **is found**, click on their underlined last name.
2) You are now on the "Subject Information" screen. Click on the 'Edit Subject' button on the right.
3) You will be brought to a new page to add the participant to your study.
4) Click on the 'Add Study' link in the right corner and three new fields will now appear under 'Study Membership':
    a. Subject ID : **Fill in applicable Study Subject ID (Used for tracking on this Study)**
    b. Study ID : **Choose your study from the drop down menu**
        i. Note: Only your assigned studies will be visible selections.
    c. Subject Status : **Select 'Enrolled'**
5) Scroll to the bottom of the page and click 'Save'.
6) You will be brought back to the "Subject Information" screen where you can now see your new study added to the participant record under 'Study Info'. From here you can also assign a card number, make a payment, schedule an appointment reminder or replace a ClinCard.
7) If you have difficulty making a payment for the first time please contact your Senior Clinical Trial Financial Analyst in the BMC Clinical Trial Office (CTO) first. Additional assistance is also available via ClinCard site support at 215-609-4378

▶ How to Assign a ClinCard to a Participant/Subject:

Once you have selected an existing Subject or registered a new Subject, you will be brought to the "Subject Information" screen. On the right hand side of the screen, you will see options that represent all of the actions you can perform on the Subject.

1) Click on "Assign ClinCard" and a pop-up screen will appear
2) In the "New Card" field, enter the 16 digit 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
5) Give the new ClinCard to the Participant and make sure the CPIF attestation boxes 1 and 2 are checked.
6) **Note**: An option to "Replace ClinCard" appears for all participants that have a ClinCard registered to them. 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 a card number from a new ClinCard card package.
    This will inactivate the lost card and automatically transfer any available/pending balance to the newly assigned ClinCard.

▶ How to **Make a Site Visit Payment:**

Once you have selected a Subject or registered a new Subject, you will be brought to the "Subject Information" screen. On the right hand side of the screen, you will see options that represent all of the actions you can perform on the Subject.

1) Click on "Make Site Visit Payment" and a pop-up screen will appear
2) Select the applicable milestone from the dropdown box for which the Participant is being paid (e.g., Visit 1, Visit 2, etc.)
3) Click on the "Pay" button.
4) 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" on the left-hand side of the screen.
5) Once a payment request has been approved and processed by the designated Approver within your department, the amount will be removed from the "Pending Payment" area and reflected in the "Available Balance" area (Participants expect timely approval within 24 hours of visit).
6) If the Subject has opted to receive email and/or text messages, the Subject will receive a payment confirmation communication when the payment is made.

   Note: If the Participant will not be compensated for some of the milestones, you should remove those from their payment schedule:
   a) Go to the Subject Information Screen, click on "Make Site Visit Payment"
   b) Choose the applicable milestone From the 'Milestone' drop down
   c) Click either the 'Missed' or 'N/A' button
   d) This will mark the payment as 'skipped' and remove it from the drop down. (this transaction is also viewable in the 'Audit History' tab in the Participants' profile)

▶ How to Setup an Appointment Reminder

Once you have selected an existing Subject or registered a new Subject, you will be brought to the "Subject Information" screen. On the right hand side of the screen, you will see options that represent all of the actions you can perform on the Subject.

1) Click on the "Schedule Appointment" button and a pop-up menu will appear
2) Using the dropdowns, enter the correct date and time of the Subject's next appointment
3) Click on the "Schedule" button
4) The appointment has been stored and will appear at the bottom of the "Subject Information" screen under the header "Appointments"
5) If the Subject has opted to receive email and/or text messages, the Subject will receive a reminder communication 3 days and 1 day prior to the Subject's next appointment

▶ How to Get Help

If you have questions or comments about using the www.clincard.com Admin Portal, please contact your Senior Clinical Trial Financial Analyst in the BMC Clinical Trial Office (CTO) for help. You may also contact BMC Research Business Information Systems at RBI@bmc.org for user account setup related issues.