

ClinCard Reference Guide: Report Viewer

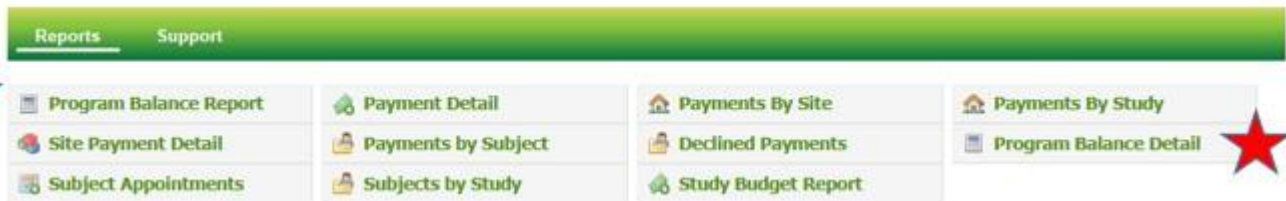
► How to Login to www.clincard.com

- 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 Review Reports

- 1) Login to www.clincard.com.
- 2) In the “Reports” screen, choose one of the following:



Note: All reports “By Site” will provide the user with data across all their BMC studies; while reports “By Study” provides the user with data on a specific BMC Study.

Reports

Payment Detail: Report will show *all* payments processed on card within the date range. Site Coordinators and Approvers will have access to this report.

Purpose: Payment Detail report will allow user to view all card loads per participant within a selected date range.

- 1) Select Program from drop down.
- 2) Choose a start and end date. The date range reflects date payments processed onto card.
- 3) Press the “Download Excel” icon to generate a report in Excel.

Payments for BMC ClinCard (Training)- 27-Sep-2014 until 27-Oct-2014

Download Excel: 

Requested Date	Transaction ID	Study	Created By	Approved By	Site #	Site Name	Card #	Subject ID	Subject Name	Approval Date	Transaction Date	Trans Type	Amount	Description	Payment Note	Approval Note
2014-10-15 09:10:06	1694997232	Ortho Surg: Stewart: H-39991 - Pilot study for SSR inhibito (ID: 0111112-6000001)	Tracy O'Connor	Tracy O'Connor	1	BMC	8018	100-300	Robert McDonald	2014-10-15 09:10:06	2014-10-15 09:04:26	ADD FUNDS	\$100.00	V2: Day 6: \$100.00		

Payments by Site: Report will show *all* payments processed on card within the date range. Site Coordinators and Approvers will have access to this report.

Purpose: Payments By Site will allow user to quickly view payment totals by site: unique subjects paid, number of payments, total payments, and average payment. Selecting hyperlink will bring user to "Site Payment Detail," for further details.

- 1) Select Program from drop down.
- 2) Choose a start and end date. The date range reflects date payments processed onto card.
- 3) Press the underlined site name to view "Site Payment Detail."
- 4) Press the "Download Excel" icon to generate a report in Excel.

Site Payment Detail Report for BMC- 27-Sep-2014 until 27-Oct-2014

Download Excel: 

Transaction Date	Transaction ID	Study	Card Number	Subject	Subject ID	Description	Amount
2014-10-15 09:06:38	1694997230	Ortho Surg: Graham: H-39992 - PhaseIV assesment of osteoclas (ID: 0111113-6000002)	1772	Sandra Rodriguez	100-200	V4: \$40.00	\$40.00

Payments by Study: Report will show *all* payments processed on card within the date range for *all* studies the user has access to. Site Coordinators and Approvers will have access to this report.

Purpose: Payments by Study report will provide the user with an overview of total payments by individual study: total subjects paid, number of payments, total payments, and average payments. Selecting hyperlink will bring user to "Site Payment Detail," for further details.

- 1) Select Site from drop down.
- 2) Choose a start and end date. The date range reflects date payments processed onto card.
- 3) Press the underlined study name for "Site Payment Detail Report."
 - a. Press the subject's name or subject's ID for "Patient Detail Report."

4) Press the “Download Excel” icon to generate a report in Excel.

Payments By Study Report for BMC- 27-Sep-2014 until 27-Oct-2014

Download Excel: 

Study	Study ID	Unique Subjects Paid	Number of Payments	Total Payments	Average Payment
Ortho Surg: Graham: H-39992 - PhaseIV assesment of osteoclas	0111113-6000002	2	6	\$175.00	\$29.17

Site Payment Detail: Report will show *all* payments processed on card within the date range for *all* studies the user has access to. Site Coordinators and Approvers will have access to this report.

Purpose: Site Payment Detail allows user to view transaction specific information for participants in corresponding studies.

- 1) Select “All Studies” or specific study for report.
- 2) Press the underlined study name for “Site Payment Detail Report”
 - a. Press the subject’s name or subject’s ID for “Patient Detail Report.”
- 3) Press the “Download Excel” icon to generate a report in Excel.

Site Payment Detail Report for BMC- 27-Sep-2014 until 27-Oct-2014

Download Excel: 

Transaction Date	Transaction ID	Study	Card Number	Subject	Subject ID	Description	Amount
2014-10-15 09:06:38	1694997230	Ortho Surg: Graham: H-39992 - PhaseIV assesment of osteoclas (ID: 0111113-6000002)	1772	Sandra Rodriguez	100-200	V4: \$40.00	\$40.00

Payments by Subject: Report will show *all* payments processed on card within the date range. Site Coordinators and Approvers will have access to this report.

Purpose: Payments by Subject allows the user to quickly view payments loaded to participant within a set date range.

- 1) Select “All Studies” or a specific study for report.
- 2) Press the underlined subject name or study ID for “Patient Detail Report.”
- 3) Press the “Download Excel” icon to generate a report in Excel.

Payments By Subject Report for BMC ClinCard (Training)- 27-Sep-2014 until 27-Oct-2014

Download Excel: 

Subject	Subject ID	Site Number	Site Name	# Payments	Total Payments	Average Payment
Sandra Rodriguez	100-200	1	BMC	4	\$125.00	\$31.25


Declined Payments: Non-applicable report because all payments are based on pre-built payment schedules and do not require additional approvals.

Subject Appointments: Name of participant will not appear in report. Site Coordinators and Approvers will have access to this report.

Purpose: Subject Appointments allows user to view upcoming appointments for respective study (ies).

- 1) Select from the “Program” drop down.
- 2) Select the start and end date of which you would like to view the payments processed on card.
- 3) Press the “Download Excel” icon to generate a report in Excel.

Subject Appointment Report for all viewable studies in BMC ClinCard (Training)- 27-Sep-2014 until 27-Nov-2014

Download Excel: 

Subject ID	Subject Name	Date Scheduled	Time Scheduled
11111111		05-Nov-2014	08:00 AM

Subjects by Study: Site Coordinators and Approvers will have access to this report.

Purpose: Subjects by study allows user to view all participants in specific study, or all studies, as well as payment totals. Select Program from drop-down

- 1) Select “Select “All Studies” or a specific study for report.
- 2) Press the “Download Excel” icon to generate a report in Excel.

Subjects By Study for all viewable studies in BMC ClinCard (Training)- until 27-Oct-2014

Download Excel: 

Subject ID	Site Name	Site Number	Date Created	Subject Name	Last Four	Card Assignment Date	First Card Assignment Date	Count Payments	Total Payments	# of Studies
100-100	BMC	1	October 15, 2014	Brian Jones	6748	October 15, 2014	October 15, 2014	1	\$10.00	1


Study Budget Report: Site Coordinators and Approvers will have access to this report.

Purpose: Study Budget Report allows user to view study budget amount remaining after payments for all studies the user has access to.

Select Program from drop-down and select “Submit Query.”

- 1) Press the “Download Excel” icon to generate a report in Excel.

Study Budget Report for BMC ClinCard (Training)- until 28-Oct-2014

Download Excel: 

Sponsor Name	Study Name	Study ID	Budget	Total Payments	Remaining Budget
BMC	Ortho Surg: Graham: H-39992 - PhaseIV assesment of osteoclas	0111113-6000002	None	\$210.00	--

★ Program Based Reporting

- ▶ **Program Balance Report and Program Balance detail are intended for central administration only, and are available to users specifically granted “Report Viewer” privileges and who provide data at the BMC company level. Program Based Reporting is the broadest reporting tool in ClinCard, intended to show the entire program’s balance: every transaction occurred on all studies and sites at BMC.**

Program Balance Report:

Purpose: Program Balance Report will depict total balance, total payments, and total subjects paid within the selected program. This can be used for quick, “high-level” reporting purposes and as a summary of Program Balance Detail. Generating a similar report for your particular study (ies) can be done through “Payments By Site.”

- 1) Select/Highlight Program(s) from text box and select “Submit.”

Program Balance Report					
Program	Balance	Total Funding	Total Payment (USD)	Number of Payments	Unique Subjects Paid
BMC ClinCard (Training) (Boston Medical Center)	\$-385.00	\$0.00	\$385.00	9	4

Program Balance Detail: Balance is shown in chronological order by “Transaction Date.” This report shows the entire program’s balance and is intended for viewing payments against issuance account in greater detail than Program Balance Report. Generating a similar report for your particular study (ies) can be done through “Payments Detail.”

Purpose: Program Balance Detail will allow user to view study balance as payments are loaded to participant cards.

- 1) Select from the “Program” drop down.
- 2) Select the start and end date of which you would like to view the payments processed on card.
- 3) Press the “Download Excel” icon to generate a report in Excel.

Program Balance Detail Report for BMC ClinCard (Training) (Boston Medical Center)- 28-Sep-2014 until 28-Oct-2014

Download Excel: 

Summary

Report Starting Balance: \$0.00
 Report Ending Balance: \$-385.00
 Number of Payments: 9
 Number of Funding Loads: 0
 Report Total Amount of Payments: \$ 385.00
 Report Total Funding Amount: \$0.00

Requested Date	Approval Date	Transaction Date	Transaction Type	Description	Payment Notes	Approver Notes	Transaction ID	Study	Study ID	Created By	Approved By	Site Name	Subject ID	Subject Name	Payment	Deposit	Balance
2014-10-15 09:05:46 EDT	2014-10-15 09:05:48 EDT	2014-10-15 09:09:27 EDT	ADD FUNDS	V1: Baseline: \$10.00			1694997226	Surg_Plast: Campbell: H- 39990 - Assessing pain management fo	0111111 - 6000000	Tracy O'Connor	Tracy O'Connor	BMC	100- 100	Brian Jones	\$10.00		\$- 385.00