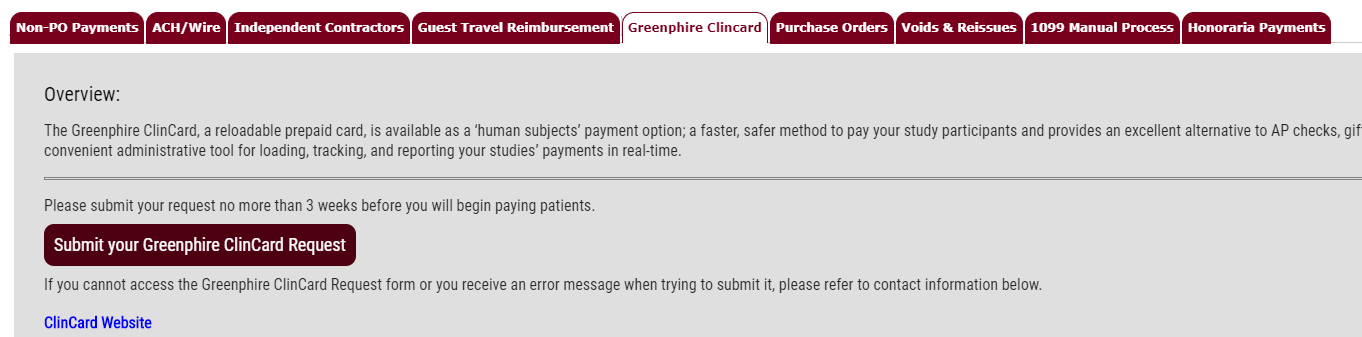
 **Department of Medicine**

Greenphire Guidance for Study Teams within DOM

\*\*Alternative to AP checks, gift cards and petty cash for subject remuneration.

**Process**

1. Requesting ClinCards
   1. An electronic request to utilize ClinCard is submitted through a link on the Accounts Payable Web-site: (<https://www.finance.upenn.edu/Disbursements-Accounts-Payable>)
   2. Greenphire can be accessed on the below “Greenphire Clincard” tab and by Submitting your Request by using the appropriate button



* 1. It is anticipated that the Study Team will be initiating the request.
     1. Requestor is required to indicate:
        + - New or Existing study
          - IRB Protocol Number
          - Study Nickname
          - # of cards being requested
          - Branded or Generic cards
          - Estimated Budget
          - Name and Email of Business Administrator  
            *(if managed by CRS- Timothy Marino /* [*timothy.marino@pennmedicine.upenn.edu*](mailto:timothy.marino@pennmedicine.upenn.edu)*)*
          - Duration of Study (in months)
     2. Requestor should be precise on the Payment Schedule (visit/milestone amount)
     3. Requestor should populate the full 26-digit for payments (and Reimbursements if utilized)
     4. To complete the form, add the following personnel who will have a role, in the Comments/Notes at the bottom of the request form:
        1. **Coordinator/s** - registers subjects in Greenphire and makes payments *(list those CRCs applicable for the study)*

**Approver (identify BA/Grants Manager)** - Any manual payment or reimbursement of $100 or more must be approved before the money is issued to the subject on their ClinCard.

**Reports-** List **Timothy Marino (DOM),** [**timothy.marino@pennmedicine.upenn.edu**](mailto:timothy.marino@pennmedicine.upenn.edu) **(Add additional business staff, as needed)**

*\*One person can have one type of access, all three, or any combination.*

* 1. Business Administrator’s name and email are required to be supplied.   
     Accounts Payable will send an email to the BA requesting s/he to authorize the request.
  2. A delegate approver will need to be identified for payments greater than $100 that are not listed within the *Payment Schedule* as part of the original request. Stipend payments that are listed on the payment schedule can be up to $700/visit/milestone. This would not require a delegate approver to authorize.
  3. Once the request receives BA approval, cards will likely be available for pick-up within 24 hours. An email will be sent to the requestor to indicate that the requested card/s are available.

1. Distributing/Loading ClinCards
   1. When distributing a ClinCard to the subject, a signed C2 form (listing the ClinCard #) and W9 will be required to be collected (current process) and submitted to Accounts Payable.
   2. Before registering and providing a subject with a ClinCard, CRC’s should search “All” to ensure that subject is not already set up and have a ClinCard for use.
   3. CRCs will be able to log-in and load money onto the subjects’ cards as visits/milestones are completed.
   4. AP will post a monthly journal to include all charges as one lump sum to each specific study. Reports are available, through Greenphire, that will break-down the lump sum and provide specific detail.
      1. Access to the system is needed for Central/BA level. CRCs will have access to this feature.

**Reporting**

1. Various reporting metrics are available through Greenphire that will provide back-up for audits. In order to run reports, access is needed.

**General Notes**

1. Foreign nationals cannot utilize this form of reimbursement.
2. **Within initial IRB application, fees/method of payment will need to be identified and described.**
   1. **An IRB modification will need to be submitted for any active study wanting to use ClinCard for their compensation mechanism.**
3. Back-up Travel documents will need to be kept by division for study related travel reimbursements paid through ClinCard.