

ClinCard Reference Guide: Site Administrator

The Admin role is available to selected users provided by the Client. Admin users have the ability to add new studies, edit existing studies, assign site users to studies, add new site and admin users, and approve payments if applicable. Additionally, Admin users may have access to view funding reports.

► How to Add a Study

To create a new study for your program:

- 1) Login to www.clincard.com
- 2) Click on “Admin”
- 3) Click on “Add Study” button
- 4) Make sure appropriate Program is selected in drop-down box
- 5) Type name of Study in “Name” field
- 6) Select the appropriate SSN Requirement from the drop-down box
- 7) Click on applicable checkboxes (if Subject Initials , Subject ID are required fields)
- 8) Select Sponsor from the drop-down box
NOTE: If the Sponsor is not in the drop-down please email support@greenphire.com to add the Sponsor. This is not a required field so you may proceed with setting up the study and ‘Edit Study’ at a later time to add the Sponsor
- 9) If Manual payments are being used select the appropriate tax option that applies only to Manual payments:
 1. Always – all Manual payments will be considered taxable on 1099 reporting
 2. Never – Manual payments will never be considered taxable on 1099 reporting
 3. Default taxable – Manual payments will be taxable unless the non-taxable checkbox is checked when requesting payment
 4. Default not taxable – Manual payments will not be taxable unless the taxable checkbox is checked when requesting payment
- 10) Enter in the total budget for the study, if applicable. This field should only be completed in the event you would like payments to stop being processed when the budget amount is hit.
- 11) Put a check in the checkbox next to the site(s) name and enter the Investigator name if there are multiple Investigator’s at the site.
Note: If no investigator is entered then it will default to the main Investigator to the site if provided at setup or no investigator
- 12) Choose a mileage rate if ‘Travel’ payments are being used for the program
 1. IRS Medical and IRS Business will default to the current IRS rates and will update automatically when the rate changes
 2. Select ‘Other’ if a unique mileage rate applies and type the amount in the ‘Mileage Rate’ field. If the amount is a flat amount per drive and not per mile check the ‘Check if flat rate’ checkbox.
- 13) Click “Submit”
NOTE: This will automatically assign you, the study creator, as a Site Coordinator and Approver if applicable for this study. However, to assign this study to any other Site Coordinators/Approvers, you will need to go into “Maintain Study Roles”

► How to Edit Study

In order to edit an existing study's requirements or setup:

- 1) Login to www.clincard.com
- 2) Click on "Edit Study"
- 3) Make sure appropriate program is selected in the drop-down box
- 4) Select the study from the drop-down list and click "Submit"
- 5) Make appropriate changes and click "Submit"

► How to Maintain Study Payments

In order to create new site payments or modify an existing payment structure:

- 1) Login to www.clincard.com
- 2) Click on "Admin"
- 3) Click on "Maintain Study Payments" button
- 4) Select the program from the drop-down list and click then select the study from the dropdown and click "Select Study"
- 5) Click "Add Option" and a pop-up window will appear, populate "Name" and "Amount" text fields before clicking "Submit"

NOTE: Repeat step for each additional payment

- 6) Once all payments are added, review the order in which they display as this is the same order in which they will appear in the drop-down box
- 7) Once all payments are added and appear in the correct order, click "Save Changes"

NOTE: You can click on "Up" and "Down" in the third column to adjust the order of a particular payment and you can delete a payment by clicking "delete"

► How to Maintain Study Roles

In order to assign existing users as a Site Coordinator/Approver for particular studies:

- 1) Login to www.clincard.com
- 2) Click on "Admin"
- 3) Click on "Maintain Study Roles" button
- 4) Select appropriate study from the drop-down box and click "Select Study"
- 5) Click on applicable checkboxes for appropriate Site Coordinators/Approvers to be assigned to study
- 6) Click "Save Changes"

Note: You will not see your name in the list of users because the admin user setting up the study automatically defaults to an approver and coordinator