

# ClinCard Admin Portal Quick Reference Guide

## How to Login to [www.clincard.com](http://www.clincard.com)

- 1) Login to [www.clincard.com](http://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](http://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 call our site support team at 215-609-4378.**

## How to Register a Subject:

- 1) Login to [www.clincard.com](http://www.clincard.com)
- 2) Click on “Register Subject”
- 3) Enter the required information (information with red asterisk (\*) into the brief form
- 4) **Note: do not enter any of the subject’s personal information in any field. Although you are required to enter information in some fields, please use the following protocol:**
  - **Name: Enter “Subject” as first name. Enter the subject ID # to be assigned as the subject’s last name (e.g. 0001).**
  - **Address: Enter the VA’s address: 3710 SW US Veterans Hospital Road, Portland, OR 97239**
  - **Date of Birth: Enter the date of registration - Do NOT enter the subject’s date of birth.**

**The only accurate information entered in ClinCard should be the subject ID # for each subject.**

- 5) Click on the “Register” button
- 6) You will be brought to the “Subject Information” screen where you can assign a card number, make a payment, schedule an appointment reminder, replace a ClinCard or edit a Subject’s information
- 7) If you have difficulty making a payment for the first time please call the ClinCard site support team at 215-609-4378 and we will be happy to walk you through it

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## How to Look Up a Subject Who Has Already Been Registered:

- 1) Login to [www.clincard.com](http://www.clincard.com)
- 2) Click on “Look Up Subject”
- 3) Search for the Subject you want to pay by entering the Subject ID and click on “Search”
- 4) Click on the underlined Subject ID of the Subject
- 5) You will be brought to the “Subject Information” screen where you can perform any of the actions required for the Subject, e.g., issue payment.

## How to Assign a ClinCard to a 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) Now an option to “Replace ClinCard” appears. 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  
**Note:** 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 from the dropdown box which milestone the patient is being paid, e.g., Visit 1, Visit 2, etc.
- 3) Click on the “Pay” button

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- 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, the amount will be removed from the “Pending Payment” area and reflected in the “Available Balance” area
- 6) Click on “Make Site Visit Payment” and a pop-up screen will appear
- 7) Select from the dropdown box which milestone the patient is being paid, e.g., Visit 1, Visit 2, etc.
- 8) Click on the “Pay” button
- 9) 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.
- 10) Once a payment request has been approved and processed, the amount will be removed from the “Pending Payment” area and reflected in the “Available Balance” area

## How to Make a “Manual Subject Payment:”

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 patient.

- 1) Click on “Manual Subject Payment” and a pop-up screen will appear
- 2) Enter the payment value that you want to pay to the Subject in the “Amount” field
- 3) Add an appropriate comment in the “Note” field, e.g., Unscheduled Visit, Week 32, etc.
- 4) Click on the “Pay” button
- 5) Once a payment request has been processed, the amount will be removed from the “Pending Payment” area and reflected in the “Available Balance” area

## How to Request Assistance:

If you have questions or comments about using the [www.clincard.com](http://www.clincard.com) Admin Portal, you may reach the ClinCard site support team by:

- 1) Submitting an email request through the “Support” link within the [www.clincard.com](http://www.clincard.com) website
- 2) Directly emailing [support@greenphire.com](mailto:support@greenphire.com)
- 3) Calling the site support team directly at 215-609-4378 (Monday – Friday between 8:30am and 8:30pm Eastern Time)