**CLINCARD**

1. Submit request through the Compass Grants Forms ClinCard Request:

* Login to [Compass](https://compass-login.emory.edu)
* Go to Navigator ˃ Emory Custom ˃ Grants ˃ Grants Forms ˃ ClinCard Request
* Complete and Submit the Grants Form - **ClinCard Request** (for instructions, [click here](http://online.flipbuilder.com/qsea/mkck/mobile/index.html#p=1))

***Supporting Documentation Required***

* IRB Approval
* Informed Consent
* Payment Schedule
* Electronic Notification of Award - eNOA (if applicable)

1. Request will be routed for approval and set up on ClinCard site - [Greenphire](https://greenphire.com)

* 48 hr. turnaround time (*Emory cash management timeline*)
* Email notification will be sent when cards are ready for pick-up from the **lobby at** **1599 Clifton RD** *(pick-up at your convenience)*

1. To assign a ClinCard to a subject:

* Register subject by login into [www.clincard.com](http://www.clincard.com) (*using credentials received from Greenphire*)
* For registration instructions, [click here](http://online.flipbuilder.com/qsea/fgcl/mobile/index.html)
* For support email [support@greenphire.com](mailto:support@greenphire.com) or call support team at 215-609-4378

1. To close out a ClinCard account:

* Email [cashmgt@emory.edu](mailto:cashmgt@emory.edu)

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**Pros**

* ClinCard is the University’s preferred method of payment to participants of both Sponsor-Funded and Non-Sponsor Funded research studies.
* Eliminates cash and checks/ Removes risk of fraud
* Saves time and effort for site staff
* Card is reloadable
* Non-loaded cards can be mailed to participant (this is up to the studies discretion) and active/load it once confirmation of receipt has been made (the department/study will be absorbing the cost of postage and handling, along with the cost of the ClinCards).
* 1-500 cards can be ordered without any issues. Over 500 requires some advance notice of a week lead time
* Enhances patient engagement and retention
* Ensures IRS tax and HIPPA compliance (Subjects have to provide social security # if reimbursement is over $600)

**Cons**

* Fees associated with ClinCard
* Cost of card - $2.85 per card
* Cost to load card each time you put money on it - $1.15 per card
* Replacement card if the patient calls ClinCard helpdesk to get one - $15.00
* Replacement card if the study provides from their stockpile- $2.85
* Currently requires manual pick up unless existing research subject already has an actual ClinCard in hand
* Cards with loaded funds cannot be mailed as they are active and legal tender at that point. In cases of a lost card that the participant has already activated, it is a $15.00 fee if they get a replacement card through Greenphire. If the study provides them a replacement card, it would come from the studies existing stock.

**DIRECT DEPOSIT**

1. Have the subject complete the [Supplier Information Form (SIF)](https://finance.emory.edu/home/_includes/documents/sections/sif-form-emory-university-v2-10-27-2020.xlsx) before you begin your request (*if participant doesn’t have means to complete the form, the coordinator may do so on their behalf*).

* Have the participant select Individual in the drop-down box rather than Study Participant
* Ensure that participants are clear on their routing and account numbers

1. Once the completed SIF is received, submit a **New Supplier Request** via Emory Express

* Login to [Emory Express](https://www.finance.emory.edu/home/index.html)
* Go to Shop ˃ Shopping ˃ Popular Forms˃ **Supplier Request**
* Complete and submit supplier request Form (*for instructions,* [*click here*](http://online.flipbuilder.com/qsea/selz/mobile/index.html)*)*
* The form will be routed to procurement services for approval and setup

1. Follow your procurement request in **Express**

* 48-72 hours to setup vendor in system.

1. Once the payee has been set up in Emory Express, submit a **Payment Request** via Compass

* Login to [Compass](https://compass-login.emory.edu)
* Go to Navigator ˃ Employee Self-Service ˃ **Payment Request Center**
* Complete and Submit form to enter the payment request for approval (*for instructions,* [*click here*](http://online.flipbuilder.com/qsea/bcsh/#p=1))
* Once approved, funds will be deposited into subject’s bank account (ACH processes daily)
* Payments are typically approved within 3-5 business days

**\*For additional help, please contact the Finance Support Center:**

**Online:** [**https://eufinancesupportcenter.force.com/login**](https://eufinancesupportcenter.force.com/login)**?**

**Phone: 404-727-7000**

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* Please note – to gain access to Emory Express & Compass, register for Emory Express training and Compass training via the [Emory Learning Management system (ELMS)](http://www.emory.edu/elms-training/learner/facultystaff.html)
* Step 2 (New Supplier Request) is done only once for each subject
* Make sure the project is open prior to submission as this could lead to delays in timely processing of payments
* Submit Payment Requests after each visit rather than after the completion of the study

**Pros**

* Partcipants receive payment faster

**CHECK**

1. Submit a **New Supplier Request** via Emory Express

* Login to [Emory Express](https://www.finance.emory.edu/home/index.html)
* Go to Shop > Shopping > Popular Forms > **Supplier Request**
* Complete and submit supplier request form (*for instructions,* [*click here*](http://online.flipbuilder.com/qsea/selz/mobile/index.html)*)*
* The form will be routed to procurement services for approval and setup

1. Follow your procurement request in **Express**

* 48-72 hours to setup vendor in system.

1. Once the payee has been set up in Emory Express, submit a **Payment Request** via Compass

* Login to [Compass](https://compass-login.emory.edu)
* Go to Navigator ˃ Employee Self-Service ˃ **Payment Request Center**
* Complete and Submit form to enter the payment request for approval (*for instructions,* [*click here*](http://online.flipbuilder.com/qsea/bcsh/#p=1)*)*

1. Once approved, check will be mailed to the address provided by participant *(Please ensure that you submitted the participant’s proper mailing address as well as their business name)*

* Payments request are typically approved within 3-5 business days

**\*Please note that checks are cut once a week on Thursdays. No checks can be held for pickup due to pandemic\***

**\*For additional help, please contact the Finance Support Center:**

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**Phone: 404-727-7000**

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* Please note – to gain access to Emory Express & Compass, register for Emory Express training and Compass training via [the Emory Learning Management system (ELMS)](http://www.emory.edu/elms-training/learner/facultystaff.html)
* Check request in Emory Express for vendors only. Individuals have to be paid via Compass
* Make sure the project is open prior to submission as this could lead to delays in timely processing of payments
* Please ensure that you include the participant’s proper mailing address as well as their business name
* Submit Payment Requests after each visit rather than after the completion of the study

**Cons**

* Checks are only cut once a week, so this can be delayed; depends on what is submitted and when

**E- GIFT CARD**

1. Submit e-gift card request through the punch-out supplier, **National Gift Card (NGC)**

* Login to [Emory Express](https://www.finance.emory.edu/home/index.html)
* Go to Shopping > Shopping Home > **NGC –Gift Cards**
* Submit Request *(When completing the requisition, you must include the IRB protocol number in the internal notes section on the requisition in order to prevent delays when ordering)*

1. Once order is processed and ready, you will receive email with info to access link/eCode to distribute to the participant

**For additional help, please contact:** [customerservice@ngc-group.com](mailto:customerservice@ngc-group.com)

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* Please note – to gain access to Emory Express, register for Emory Express training via the [Emory Learning Management system (ELMS)](http://www.emory.edu/elms-training/learner/facultystaff.html)

**Pros**

* The eCode platform from NGC severely limits the chance of fraudulent activity
* E-Gift Card-Visa can be used everywhere Visa cards are accepted in the U.S
* The following e-gift cards never expire: Amazon, Starbucks, Target, Walmart and Regal
* There is no cost associated with e-gift cards (There is a fee for plastic cards; costs are listed in NGC)

**Cons**

* Visa E-Gift Card: there is an expiration date. Expired cards cannot be turned in for unexpired cards if you fail to enroll as expected.