

ClinCard Reference Guide: Approver

► How to login to ClinCard

- 1) Login to 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.

► How to approve a payment

- 1) Login to www.clincard.com
- 2) Click on “Payment Approvals”
 - a. If you do not have ‘coordinator’ access, you will be automatically brought to this page upon log-in
- 3) If there are payments pending your approval, you will see these listed on the page
- 4) You can review the payments on the page (if there are more details than shown, click ‘more details’), and if you would like to approve all, click ‘approve all’ at the top of the page, and then scroll to the bottom and click ‘save changes.’
- 5) If you want to approve payments one-by-one, you can select each that you want to approve, and then save. You can also choose payments to decline, if necessary.
- 6) You can include a note, if you would like, explaining why you are approving/declining the payment.

Email alerts will be sent twice daily to inform you that there are payments pending your approval. These messages are sent at 6am and 4pm EST

*Participants expect timely approval within 24 hours of visit