



Assign or Replace a Physical ClinCard

As a **Study Coordinator**, you have the ability to assign a physical card to a registered participant or replace a previous card.

Steps:

Assign a Card

- 1 From the **Lookup Participant** page, locate the participant, as described on the Look Up a Participant quick guide. The **Participant Information** page for that participant will display.
- 2 From the **right-hand menu** of options, click **Assign ClinCard**. The **Assign Card** modal will display.
- 3 In the **New Card** field, enter the token number visible through the window of the relevant ClinCard card package you received.
Note that you should not open this envelope prior to providing it to the participant. Also, you should never solicit this information or the security number from the participant, as this is a violation of banking rules. You should also never take or send a picture of the card.
- 4 Click **Assign**.
A **confirmation message** will appear at the top of the Participant Information page, as follows: "Success! The new card has been successfully assigned to <Participant Name>. The new card will be active within 10 minutes."
In addition, now that the participant has been assigned a card, a new option, "**Replace ClinCard**," now appears in the right-hand menu of possible actions. Should the participant lose this card in the future, you would click this option to have it replaced, as described below.

Replace a Card

- 1 From the **Lookup Participant** page, locate the participant, as described in the Look Up a Participant quick guide. The **Participant Information** page for that participant will display.
- 2 From the **right-hand menu** of options, click **Replace ClinCard**. The lost card will immediately deactivate and the **Replace ClinCard** modal will display.
- 3 In the New Card field, enter the **token number** on the outside of the envelope and click **Replace**.
A **confirmation message** will appear at the top of the Participant Information page, as follows: "Success! The new card has been successfully assigned to <Participant Name>. The new card will be active within 10 minutes." Once the card is active, the balance from the previous card will be available on the new card.

Frequently Asked Questions

Is the token number I need to enter the same as the number on the card?	No, the token number is unique and is not the same as the 16-digit card number.
What if the Participant Information page is missing the card number, although one was previously assigned?	If the card number is missing, please look up the participant's Audit History to confirm that Greenphire Support has replaced the card. If they have, the participant must activate the card. Activation will prompt the final four digits of the new card to populate on the Participant Information page.

Greenphire Support Site:

[Greenphire Support](#)

Greenphire Support Lines:



Assign or Replace a Physical ClinCard

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