



Edit a Registered Participant's Information

As a **Study Coordinator**, you can edit information for a registered participant.

Steps:

- 1 On ClinCard's **Lookup Participant** page, search for the participant in question, as described in the Look Up Participant quick guide. The **Participant Information** page for that participant will display.
 - 2 In the right-hand list of available activities, click **Edit Participant**. The **Edit Participant Information** page for that participant will display.
- From this page, you can do any of the following:
- **Add or edit information** in the personal information fields.
 - **Add a Tax Identification Number (TIN)** for the participant, if needed. If your study requires your participant's TIN, a red asterisk will appear next to that field, and you will be unable to save the profile without it. A TIN is mandatory, for example, if your study is configured for ClinCard's TIN Validation Service or ClinCard's Tax Management Service. In those two scenarios, the status of a participant's TIN, or any action needed with regards to the TIN, will display in a banner message at the top of the Participant Information page
- 3
 - **Enable email alerts** for the participant. The email alerts activated when this is checked are: **payment confirmations, balance reminders and appointment reminders.**
 - **Enable text messaging** for the participant. The text message alerts activated when this is checked are: **payment confirmations, balance reminders and appointment reminders.** (U.S. only)

Note that when the participant has completed the study, you should ensure that Participant Status is changed to "Completed." Likewise, if the participant has dropped out of the study, you will need to change the value in the Participant Status field to "Dropped." Doing so ensures that they can no longer be paid.
 - 4 Click **Save**. The changes are reflected immediately.

Frequently Asked Questions

What if a participant doesn't want to provide the required registration fields (e.g., date of birth or their real address)?	For a bank to issue a debit card, a valid name, date of birth and address are required. Invalid data may result in the inability for the participant to receive customer service through the Support Help desk or could result in a closed card. If a participant does not consent to having their information in ClinCard, you will need to follow up with your Sponsor Study Contact, or, if you are a site/university client, you will need to reach out to your Site Administrator.
Can a participant provide a P.O. box for an address?	For U.S. participants, a P.O. box is acceptable. For Canada and Europe, a P.O. box cannot be used. The participant's address must be a legitimate street address.

Greenphire Support Site:

[Greenphire Support](#)

Greenphire Support Lines:

United States Toll Free:	1-844-847-0107	United Kingdom:	0208-150-5470
United States / Canada:	1-215-609-4378	International:	(+44) 208-150-6470