Register a Participant

A **Study Coordinator** has the ability to register a participant in a study. Note that a participant can be registered in several studies simultaneously. A Study Coordinator will only be able to register participants in studies to which they have access in their user profile.

Steps:

1	From ClinCard's Study Coordinator **landing page** (Look Up Participant), click the **Register Participant** tab. You will be prompted to select a study.
2	Select the desired **study**. The **Participant Registration** page will display. Note that this page will reflect some choices that were made during ClinCard configuration, for example: • If the sponsor/CRO/Site Administrator has opted for notifications, this page will collect the participant's email address and cell phone number. • If a study has been configured for 1099 reports, TIN (Tax Identification Number) will be enabled, and a TIN field will display next to the Last Name field. • If the sponsor/CRO/Site Administrator has opted to use ClinCard's ConneX service, the participant's name entered here must be the exact name found on the participant's legal travel documents (e.g., passport or photo ID). (Note that ConneX is not relevant to Site/University clients.)
3	In the **Study Status** field (Required), enter one of the following: • **Enrolled** – If the participant has been randomized and given a real Subject ID. • **Screening** – If the participant has not yet been randomized (since it is not yet clear that they will pass the screenings to become a participant). • **Washout Period** – This indicates that a milestone, such as a treatment or medication, requires that a period of time pass before the next upcoming milestone. Whether or not the participant has been randomized and issued a permanent Subject ID will depend on the study's practices.
4	In the **Subject ID** field (Required), enter the participant's Subject ID, patient number, etc., as per the study protocol. Please note that there may be validation on the formatting of this field.
5	In the **Site** field (Required), select the site from the dropdown provided.
6	In the **Consent Date** field (Required if this field appears, i.e., if it was configured for this study), enter the **date** the participant signed the form **indicating consent** to participate in the study.
7	Enter **First** and **Last Name** (Required). Note that for sponsor/CRO studies utilizing ClinCard's ConneX service, the first and last name must be the same as on the participant's legal travel documents. Also note that if your study is configured for initials, and you enter initials in the optional Initials field, those initials will be used. Otherwise, ClinCard will automatically calculate your initials. **Note**: When registering a minor under the age of 18, instead of the participant's name, address and date of birth, make sure to enter the **parent's or caregiver's name, address and date of birth**.
8	The **TIN** (Tax Identification) field (TIN is equivalent to the Social Security number in the U.S.) is required (for non-Site/University clients) if, in the study configuration, the sponsor/CRO/site has opted for one or more of the following Greenphire services: • **1099** Service • **TIN Validation** Service • **Tax – Backup Withholding** Note that this is only applicable for the U.S. currently and applies to citizens and non-citizens alike. Also note that the TIN is not enforced when the client subscribes to the Tax Management Service alone because if no TIN is provided, backup withholding will go into effect for this participant.
9	In the **Country** field (Required), select the country in which the participant has their primary residence (typically, the country in which the participant will be participating in the study).
10	In the **Address** field (required), begin typing the address and Google will provide results based on the country you specified in the Country field.
11	In the **Timezone** field, select the appropriate field from the dropdown list.

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12	In the **Language** field, select the language in which all text and email payment confirmations and/or appointment reminders should be sent to this participant.
13	In the **Date of Birth** field (Required), enter the participant's date of birth.
14	In the **Participant Email Address** field (Required if you are opting for ClinCard's email messaging capabilities), enter the participant's email address. In addition, check the **Enable Emails** checkbox.
15	In the **Participant Cell Phone** field (Required if you are opting for ClinCard's text messaging capabilities), enter the participant's cell phone number.
16	Finally, when all required and desired optional fields have been completed, click **Register**. The **Participant Information** page for the new participant will display. The right-hand panel of this page will display a menu containing all the tasks you can perform, based on the ClinCard capabilities and payment methods that were configured by the study sponsor. For example, if milestone and miscellaneous payments have been configured, the Request Payment menu item will appear.

Frequently Asked Questions

If my sponsor/CRO/site has subscribed to the Tax Management service and we neglect to provide the participant's TIN, what will occur?	If Greenphire's Tax Service has been activated, but no TINs have been provided, taxes will be withheld from the participant's milestone and miscellaneous payments.
Will providing a TIN always be required?	No, as described in Step 8, above, it depends on the Greenphire services subscribed to, and therefore, will vary on a study-by-study basis.
The Address search is not finding the correct address for the participant. Is there any way to enter the address manually?	Yes. If no results are found, simply click on the message that is displayed below the Address field and fields for manual entry will appear.
What country should I select in the Country field if the participant is flying into the U.S. from Canada?	In this instance, you should select Canada, since that is where the participant resides.
Will the country I select in the Country field impact the languages in which patient-facing materials will be available?	No, country selection does not impact the languages in which patient-facing materials will be available. That language is specified in the SOW between Greenphire and the client.
What Subject ID should I use when providing the caregiver information when registering a minor?	You should use the participant's Subject ID or the participant's Subject ID with "CG" after it to indicate that a caregiver has been registered. Whether or not the "CG" should be included depends on the preference of the sponsor/CRO.

Greenphire Support Site:

[Greenphire Support](#)

Greenphire Support Lines:

United States Toll Free:	1-844-847-0107	**United Kingdom:**	0208-150-5470
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