Greenphire Patient Payments

Assign or Replace a Virtual ClinCard

This quick guide pertains only to those studies for which Greenphire Patient Payments' virtual ClinCard capability has been configured.

As a **Study Coordinator**, you have the ability to assign a **Virtual ClinCard** (i.e., a digital version of a ClinCard prepaid debit card, distributed electronically) to a participant registered in a study that has virtual cards enabled.

Note that depending on the **study configuration**, you could encounter one of three different card assignment scenarios:

- **Physical Only** – This will result in the standard Greenphire Patient Payments ClinCard registration, where the token number visible through the window of the physical ClinCard card package is required when assigning a card (see the Assign or Replace a Physical ClinCard quick guide). Note that a physical study can only have a physical card assigned.
- **Virtual Only** – This will result in the Greenphire Patient Payments virtual ClinCard registration, where a virtual ClinCard will automatically be assigned. Note that a virtual study can only have a virtual card assigned.
- **Physical or Virtual** – A physical or virtual study can have either a physical or virtual card assigned at the participant level. The Study Coordinator can select, for each participant, which card type should be assigned.

Steps:

1	Select an existing participant from the **Lookup Participant** page or **register** a new participant (see the Register a Participant quick guide). The **Participant Information** page will display.
2	From the **right-hand menu** of options, click **Manage Payment Methods**. The **Manage Payment Methods** dashboard will display.
3	In the **Enrolled Studies** section at the bottom of the page, select the **checkbox** next to the study or studies in which a virtual ClinCard will be assigned.
4	After selecting the applicable studies, click the **Assign** drop-down menu in the top right-hand corner of the **Enrolled Studies** section. Select **Virtual Card**. The Assign Virtual Card slider will display.
5	In the **Recipient Date of Birth** field (Required), enter the date of birth. • If a caregiver is listed as the payment recipient, this field will capture the caregiver's date of birth. • If the date of birth was captured during the registration process, this field will be pre-filled. **Note:** The date of birth must be correctly entered into Greenphire Patient Payments in order for the participant to access their virtual card. Please ensure the date of birth matches the participant's government-issued ID before completing registration.
5	In the appropriate fields, enter **Email Address** and **Confirm Email Address** (Required). Note that: • Both the Email Address and Confirm Email Address fields must be manually entered. Cut and copy functionality is restricted. • Both the Email Address and Confirm Email Address fields must match. In the event of a mismatch, you will receive an error requiring you to correct before proceeding. • If the Participant Email Address field was entered during the participant registration step, the Email Address field will pre-populate with this data. (Please verify that the email address is correct.) • If you change the pre-populated Email Address field, the Participant Email Address field on the Participant Information page will also be updated. • If you enter an email address format that does not match the technical specification for a valid email address (e.g., a top-level domain (TLD) suffix such as .com, containing one @ symbol, etc.), you will be required to correct it before proceeding.
6	Click the **Assign** button. The participant will receive an email within 5-10 minutes containing a link to access their virtual card account. (This email is available in English and Spanish and is sent based on the language selected during participant registration.) A **confirmation message** will appear on the Assign Virtual Card slider, as follows: "Success! The Virtual Card ending in XXXX has been successfully assigned. Once the participant has been assigned a Virtual card, the Virtual Card tile will appear on the Manage Payment Methods dashboard in the Active Payment Methods section.
7	If you are asked, the participant can access their virtual ClinCard by following these steps: a. Open email and click the **Access your Card** link. b. After clicking the link, the participant will be prompted to enter their **access code**, which is their 4-digit year of birth.

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c. Once the access code is confirmed, the participant will be able to view their card information, such as the card number, expiration date and CVV.

Related Topics:

Register a Participant

Assign or Replace a Physical ClinCard

About the Available Participant Payment Methods

Frequently Asked Questions

What if the participant does not have, or is unwilling to provide, a valid email address?	A virtual card cannot be assigned without a valid participant email address. Physical cards do not require a valid email address.
What if a participant does not receive the Virtual ClinCard access email?	If a participant does not receive the Virtual ClinCard access email or deletes it in error, the participant must contact Cardholder Support at **1-866-952-3795** to re-trigger the email. Note that the Study Coordinator may also contact Cardholder Support on the participant's behalf to request that an email be re-triggered, if preferred.
Does the link to access the virtual card account expire?	The link within the email does not expire, so if the participant retains the email, they can use it at any time in the future to access their card details. They can also access card details through the cardholder website/mobile app (once they have registered online). Note that the participant will be required to verify their identity every time they access card details through the email link.
What if an incorrect (invalid or outdated) email address is entered?	At this time, the Study Coordinator does not have the ability to re-trigger a virtual card access email (with an existing/updated email address). The Study Coordinator can only assign an initial card or replace the card. Note that the Study Coordinator can either: (1) Direct the participant to contact Cardholder Support at **1-866-952-3795** to re-trigger an email (and update an invalid email address, if required), or (2) Contact Support on behalf of the participant to re-trigger an email and/or update an email address. Requests from Study Coordinators to update email addresses must come in writing via the Suvoda Support tab, and must contain the study name, Subject ID, last 4-digits of the card number and the correct email address.
What if an incorrect date of birth is entered for the participant?	If an incorrect date of birth is entered for a participant, they will not be able to access their virtual card. Please ensure the date of birth matches the participant's government-issued ID.
When will a virtual card expire?	A virtual card is valid for 36 months from the month of card creation (i.e., the date a virtual card is successfully assigned).
How do I replace a virtual card for a participant?	Replacing a virtual ClinCard follows a similar workflow to that of the physical ClinCard replacement process, i.e., clicking on the vertical ellipsis in the top right corner of the virtual card tile, then clicking Replace Card. The Replace Virtual Card slider will be displayed
Why do I see both physical and virtual card payment method options available for assignment?	For physical or virtual studies, a participant can be assigned a physical card and/or a virtual card. **Note:** If a participant changes card type, the funds will not be transferred from a physical card to a virtual card or vice versa. The original card (whether it was physical or virtual) will remain active, and all new payments will be loaded onto the new card.
Is there a limit to the number of times a participant's card type can be changed?	For physical or virtual card studies, there is no limit to the number of times a card type can be changed for a participant.

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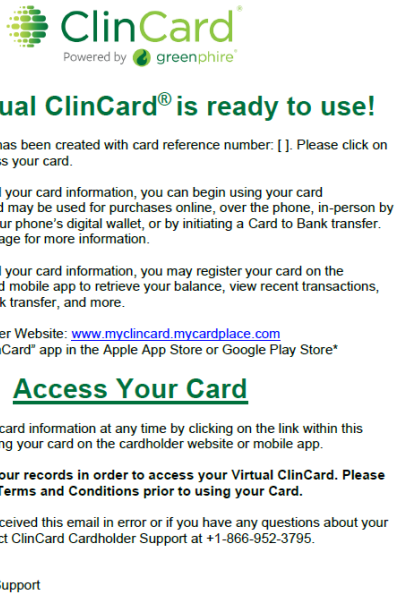
Can I assign a card to a participant located outside of the U.S.?	Cards are only authorized to be issued within the U.S. (including Puerto Rico). A participant may be registered with a non-U.S. address if their permanent address is outside the U.S. However, the participant must be physically located within the U.S. at the time they receive their virtual or physical card.
How does the participant receive cardholder materials for virtual cards?	The participant will receive all cardholder materials for virtual cards electronically. The virtual ClinCard access email (Subject: Your Virtual ClinCard has arrived!) will contain: • **Attachment**: Cardholder Agreement PDF • **Links**: Cardholder FAQ and cardholder website • **Other Info**: Reference to the My ClinCard mobile app, Cardholder Support phone number (**1-866-952-3795)**, and card details (viewable online once the participant's identity is verified)
What instructions are provided to the participant on how to activate their virtual card?	The participant receives an email with the following information and instructions:  ClinCard Powered by greenphire **Your Virtual ClinCard® is ready to use!** Your Virtual ClinCard has been created with card reference number: [ ]. Please click on the link below to access your card. Once you've accessed your card information, you can begin using your card immediately. Your card may be used for purchases online, over the phone, in-person by adding your card to your phone's digital wallet, or by initiating a Card to Bank transfer. Please see the FAQ page for more information. Once you've accessed your card information, you may register your card on the cardholder website and mobile app to retrieve your balance, view recent transactions, perform a Card to Bank transfer, and more. My ClinCard Cardholder Website: www.myclincard.mycardplace.com Download the "My ClinCard" app in the Apple App Store or Google Play Store* **Access Your Card** You may access your card information at any time by clicking on the link within this email, and by registering your card on the cardholder website or mobile app. **Keep this email for your records in order to access your Virtual ClinCard. Please review the ClinCard Terms and Conditions prior to using your Card.** If you feel you have received this email in error or if you have any questions about your account, please contact ClinCard Cardholder Support at +1-866-952-3795. Thank You, ClinCard Cardholder Support
What instructions are provided to the participant on how to replace their virtual card?	The participant receives an email similar to the one above, with the indication that this is a replacement Virtual Card and instructions the participant should follow if they did not request that their existing card be replaced.

Suvoda Support Site:

Suvoda Support

V2.1
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