Greenphire Patient Payments

Edit a Registered Participant's Information

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

Steps:

1	On Greenphire Patient Payments' **Lookup Participant** page, search for the participant in question, as described in the Look Up Participant quick reference guide. The **Participant Information** page for that participant will be displayed.
2	In the right-hand list of available activities, click **Edit Participant**. The **Edit Participant Information** page for that participant will display.
3	From this page, you can do any of the following: • **Update Personal Information**. Edit details such as name, address, notification preferences and payment recipient • **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 Greenphire Patient Payments' TIN Validation Service or Greenphire Patient Payments'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. • **Edit the participant's Country of Residency**. This field is only available when Country of Residency collection is enabled for a study in which the participant is enrolled. The collection of the participant's Country of Residency will allow Suvoda to provide them with the relevant tax notices and forms. - **U.S. residents** – If the participant's Country of Residency is changed to United States, the collection of a valid TIN (Tax Identification Number) is required. - **Non-U.S. residents** – If the participant's Country of Residency is changed to a **country outside the United States**, the TIN field will not be displayed, but additional action will be required. Please see the Frequently Asked Questions section below for additional information. • **Edit Study Fields.** Update Participant Status, Subject ID, Site and DPN Attestation Fields (if enabled for the study). • **Edit DPN Attestation Fields.** These fields will only appear if DPN (Data Protection Notice) tracking has been enabled for the selected study. - If the participant already has a completed DPN attestation for that study, the DPN Attestation checkbox and date fields will appear in a view-only mode and will not be editable. - If DPN tracking was not enabled at the time the participant was added to the study, but has since been enabled, the checkbox and date fields will be editable but not required. This allows you to capture the participant's attestation at a later time, if applicable. • **Add Additional Study.** Enroll the participant in more than one study. • **Validate Address.** Ensure accuracy for the participant's or caregiver's address using the Validate Address feature, reducing manual entry errors. • **Update Notification preferences:** - **Email Alerts**. Activate payment confirmations, balance reminders and appointment reminders for the participant and caregiver. - **Text Messaging** (US only). Activate payment confirmations, balance reminders and appointment reminders via text for the participant and caregiver. Update the time zone to set the preferred delivery time. • **Manage Payment Recipient.** Choose who receives the payment – the participant or the caregiver – based on their status, as follows: - **Not a minor, not a dependent**. The participant is the payment recipient. - **Minor**. The caregiver is the payment recipient, unless the payment method is Bank Transfer, in which case the payment recipient can be either the caregiver or the minor. - **Dependent Over 18**. The payment recipient can be either the caregiver or the participant. 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.

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Related Topics:

Register a Participant

About the DPN Attestation

Understanding the Participant's Tax Status Certification Experience

Frequently Asked Questions

What if a participant doesn't want to provide the required registration field information (e.g., their 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 Greenphire Patient Payments, 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 participants in Canada and Europe, a P.O. box cannot be used. The participant's address must be a legitimate street address.
What if the address wasn't validated?	Address validation isn't required to save the record, but, if performed, it ensures the accuracy of the address.
Why am I not able to enroll the participant in another study?	As a Study Coordinator, you will only be able to register participants in studies to which you have been granted access, as reflected in your user profile.
What happens if I change the payment recipient for a ClinCard Prepaid Card (U.S.), and how do I replace the card if needed?	**ClinCard (U.S.)**: Changing the payment recipient for a ClinCard Prepaid Debit card and saving your changes will re-personalize the card with the new recipient's information. If a card replacement is necessary, in the participant's profile, click **Manage Payment Methods**. The Manage Payment Methods dashboard will display. Find the card tile you wish to replace in the Payment Methods section, click the vertical ellipsis in the top right corner of the tile, then click **Replace Card**. For virtual card replacements, you will need to provide new email information. For physical card replacements, a new token will be required to ensure payments are directed to the correct account.
What happens if I change the payment recipient for a ClinCard Prepaid Card (EU)? How do I replace the card if needed, and what are the steps for identity verification?	**ClinCard (EU)**: Changing the payment recipient will re-personalize the card with the new recipient's information. The new payment recipient must undergo the Identity Verification process to comply with the EU's digital identity regulations, which may take 1 to 3 business days. During this period, requested payments will be queued, the previous recipient and the new payment recipient will not be able to use the card. The 'Replace Card' option in the vertical ellipsis of the card tile on the Manage Payment Methods dashboard will be disabled until verification is complete.
What will happen when I change the payment recipient, and the payment method is Bank Transfer?	Changing the payment recipient will not update the account details sent to the payment processor. To update the bank account information, navigate to the **Manage Payment Methods** dashboard. Find the Bank Transfer tile you wish to update in the **Available Payment Methods** section, click the vertical ellipsis in the top right corner of the tile, then click **Update Details**. This will ensure payments are directed to the correct bank account.
What will happen when I change the payment recipient, and the payment method is Direct Deposit?	Changing the payment recipient will update the participant's profile details sent to the payment processor with the new payment recipient's information. To update the bank account information, navigate to the **Manage Payment Methods** dashboard. Find the Direct Deposit tile you wish to update in the **Available Payment Methods** section, click the vertical ellipsis in the top right corner of the tile, then click **Update Details**. This will ensure payments are directed to the correct bank account.

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Why do we collect Date of Birth? (DOB)	The collection of Date of Birth (DOB) serves multiple purposes during participant registration. • **DOB Collection Configuration** – When the "Collect Date of Birth" program configuration is enabled, you will be prompted to enter the DOB of the payment recipient (either the caregiver or the patient) during registration • **Compliance for ClinCard Payments** – If the study's payment method includes the ClinCard Prepaid Debit Card, banking regulations prohibit minors from receiving payments. To ensure compliance, you must enter the DOB of the payment recipient when assigning the card.
What action is required if a participant's Country of Residence is changed to a non-U.S. country?	Upon saving, a link to complete Form W-8BEN will be emailed to the participant if an email address has been provided. If the participant's email address has not been provided, please provide the participant with the link to complete Form W-8BEN (www.greenphire.com/taxform). The W-8BEN form is required by the IRS to determine if backup withholding should apply. **Note:** The participant will not be able to receive milestone or unsubstantiated reimbursement payments until a completed W-8BEN form has been received. For additional information, please see Understanding the Participant's Tax Status Experience.

Suvoda Support Site:

Suvoda Support

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