Q2. How do I get my study set up with ClinCard

Once a Chart of Accounts (COA) has been established for the study, then a Study Information Page (SIP) form may be filled out and submitted to clinresclincard@utsouthwestern.edu.

- The Study Information Plan Template is in the SPA Document Library under the Tools & Resources tab.
- The ClinCard by Greenphire SOP and training aid is also in the SPA Document Library.

ClinCard by Greenphire SOP	Indirect Cost (IDC) Matrix Guide	Set Up Award – Top Questions & Answers
Clinical Trial Agreement (CTA) Submission Guide	J	Sponsor Request Form
Clinical Trial Budget Tool Tip Sheet	Just In Time (JIT) Business Process	Study Information Plan (SIP) Template

Study Information Page

Information on this sheet provides data to the other forms in the ClinCard Workbook

Please fill out sheet in its entirety

Study Information

IRB STU#	
Study Velos #	
Department Name	
Sponsor Name (if applicable)	
Study Name (Short Name)/Reference Name	
MAX # of Participants for this study	
Projected Start Date	
Estimated Length of Study	
General Ledger Business Unit	
Operating Unit	
Account	
Department	
Fund Type	
Source	
Function	
PC Business Unit	
Project ID	
Activity	
Principal Investigator	

** Full Chart of Account string required**

Staffing Plan   * Access for PIs is limited / Maximum amount of approvers is 4

Role	Name	Email Address	Phone Number	Approver of Manual Payments (Y/N)	Site Coordinators -regular payments (Y/N) (Milestone Payments)	Needs Access to Study Reports for Reconcilation? (Y/N)	Completed Clincard Training/Training must be completed to be added to Greenphire
Primary Site Coordinator							
Back-up Site Coordinator							

**Please note approver of manual payments is for manual only. Preset payments can be authorized by site coordinator.

You cannot have both approver and site coordinator access. You are a site coordinator if the approver field is N. Approver of manual is for off payments.

all users must complete training

Payment Details

Payment Description (Visit Name)**	Payment Amount*	Visit Order
		1
		2
		3
		4
		5
		6
		7
		8
		9
		10
		11
		12
		13
		14
		15
		16
		17
		18
		19
		20

* An automatic tax witholding amount of 24% (2019 IRB Rate) will be deducted if SSN is not provided*

** Travel reimbursement payments must be completed through the proper reimbursement process. Manual payments are not to be used for travel reimbursements**

Studies subjected to an automatic business mileage rate of $0.56 (2021 rate), set by the IRS. If a different mileage needs to be set-up, please complete per below

For additional resources, please visit the [SPA Education and Training website](#) for links to the following modules:

Introduction to ClinCard by Greenphire

[(Module M)](#) ↗

This module teaches the clinical research community the ClinCard by Greenphire system. ClinCard is a web-based platform that allows users to manage clinical research participant payments. Once you complete this training, you can access the system, navigate ClinCard, and use essential contact information for usage assistance.

[Reference Guide](#)

ClinCard Compliance and Best Practices

[(Module N)](#) ↗

This module provides best practices on how to use the ClinCard system to ensure compliance.

[Reference Guide](#)