

SOP number: SOP CW AHC 251	SOP Name: Greenphire ClinCard Payment
Location: *Company-Wide Policies	Responsible Department: Research Finance
SOP Owner/Executive Owner: Director, Research Finance	Original Creation Date 7/1/2022
Effective Date 08/22/2022	Review Date 8/17/2022

- I. **SCOPE:** This standard operating procedure (SOP) applies to all employees and agents of AdventHealth.
- II. **PURPOSE:** This SOP describes the procedures, internal controls, and confidentiality of information for the establishment and use of Greenphire ClinCard Program for approved AdventHealth payment programs.
- III. **QUALIFIED PERSONNEL:** Employees and agents of AdventHealth who have been trained in the use of Greenphire ClinCard Program system.
- IV. **TRAINING:** Greenphire ClinCard Program training specific for user roles described below.
- V. **SUPPLIES & EQUIPMENT:** Not applicable
- VI. **PROCESS/PROCEDURE:**
 - A. Greenphire ClinCard Program user roles are assigned based on the following permissions and responsibilities:

Permission Set Name	In-Portal Permissions	Non-portal Activities	Report Access
Administrator	Create studies and milestone payment schedules, edit studies, add users, manage user permissions Reports	Order ClinCards, manage card inventory, provide training to new users, process batch registration or milestone payments Manage funding of issuance account, bill fees back to studies depending on use of ClinCard	All reports, all studies
Study Coordinator	Register subject, assign ClinCard, pay subject, void payments	Request access to ClinCard internally, educate patients on use of ClinCard	

- B. Greenphire ClinCard Program user management
 - 1. Operational leaders are responsible for requesting new users or updates to existing

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- users by emailing Research Finance at CFD.Research.Finance@AdventHealth.com and providing the following information:
- a) Name(s) (as it/they appear in AdventHealth)
 - b) OPID(s)
 - c) Department(s)
 - d) User role(s)
2. Research Finance is responsible for:
- a) Creating new or updating existing Greenphire ClinCard Program user profiles
 - b) Assigning the following roles:
 - i. Administrator
 - ii. Study coordinator
- C. Individuals designated as study coordinators are responsible for creating payees and assigning them to studies within their access privileges.
- D. Card Management
1. Research Finance is responsible for:
 - a) Requesting payment cards from the vendor.
 - b) Assigning cards to departments.
 - c) Inventory of unassigned cards.
 - d) Charge back to departments for card costs.
 2. The study team is responsible for:
 - a) Requesting payment cards from Research Finance emailing CFD-S.Research.Finance@AdventHealth.com with a cc to Amanda.Carter@AdventHealth.com. Email subject line **must** have “Greenphire ClinCard Request” for proper routing and timely distribution.
 - b) Inventory of assigned cards.
 - c) Payee management.
 3. Greenphire ClinCard Program cards must be tracked and maintained in a secure location.
- E. Study and milestone payment management. Research Finance team is responsible for:
1. Funding and monitoring the balance in the system
 2. Ordering and shipping cards to study coordinators
 3. Creating studies
 4. Building the milestone payment schedule(s)
 5. Adding studies to new users
 6. Posting Greenphire ClinCard Program expenses to the general ledger
 7. W2/1099 tracking and reporting
- F. Payee Management
1. All payees **must** be created in the system, associated to a study, and assigned a card.
 2. The study coordinators are responsible for:
 - a) Creating a payee and assigning to a study.
 - i. A completed W-9 **must** be obtained from the payee prior to disbursement of
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- ii. funds. W-9s **must** be stored in a secured platform.
 - ii. The Greenphire ClinCard Program platform automatically checks the Social Security Number against the IRS database for validity.
 - b) Providing participant-facing information related to Greenphire ClinCard Program use prior to card distribution.
 - c) Assigning physical or virtual cards to payees and providing Greenphire ClinCard Program terms and conditions in person or by mail; terms and conditions will be emailed to participants by Greenphire ClinCard Program if a virtual card is assigned. If the card is mailed to the payee, receipt of the card must be confirmed by the study coordinator via a phone call prior to disbursement of funds.
 - d) Confirming remuneration amount prior to disbursement of funds. A reversal window is available to correct errors that may occur during disbursement of funds. Reversals can only be completed if funds have not been exhausted. Reversals generate an associated transaction cost and will be assessed to the department.
 - e) Notifying payees that text and email notifications are available and selecting these options in Greenphire ClinCard Program when the participant opts-in for such notifications.
 - i. An email address or mobile phone number **must** be provided to opt-in to text/email notifications.
 - ii. Text/email preference can be updated for a participant at any time in payee management.
 - f) For step-by-step instructions in payee management, refer to Greenphire ClinCard Program Knowledge Center found on the Greenphire ClinCard Program website.
3. The Payee is responsible for:
- a) Providing and completing all required forms prior to participating in the Greenphire ClinCard Program.
 - b) Understanding the content of the Greenphire ClinCard Program terms and conditions.
- G. Greenphire ClinCard Program costs: All costs associated with the payment card including cost of card, transaction load, and reversal fees, and remuneration are the responsibility of associated department.

VII. **DEFINITION(S):**

ClinCard: The physical card used to provide remuneration to participants.

Greenphire ClinCard Knowledge Center: This can be accessed by clicking on the book icon on the bottom right corner of the Greenphire ClinCard Program website.

Greenphire ClinCard Program: An activity, project, or program administered by AdventHealth that requires payments to individuals outside of a traditional Accounts Payable vendor structure. Currently, this is the only approved type of program at AdventHealth.

Participants: A set of payees that are reimbursed (compensation and/or expense) for

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participating in a study.

- VIII. EXCEPTION(S):** Not applicable
- IX. REFERENCE(S):** Not applicable
- X. RELATED DOCUMENT(S) / ATTACHMENT(S):**
CW AHC 250 Greenphire Research Participant Remuneration

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