



ClinCard New Study Registration

Please email completed form to: Lydia Zantout at lxz327@miami.edu. 305-284-3953.
or: RA Participant Payments at participantpayments@miami.edu.

TODAY'S DATE:			
Requestor Information			
Name			
Title			
Department			
Phone No.		UM Email	
Building & Room #			
Study Details			
Study Name (complete name)			
Study Nickname for website / Acronym – 1-2 words			
Study Start Date		Study End Date	
Estimated date of recruitment of first participant			
Total # Participants		# Cards (participants) for first 2 months	
Study Sponsor(s)			
IRB #		IBIS#	
PI Name			
PI email			
Will you be seeking a W-9 Exemption? Y or N		Will Lyft rides be booked through the website? Y or N	
<i>Which payments methods would you like to enable? Sponsor must approve. Multiple options are allowed.</i>			
Physical Debit Card:	☐	Virtual Debit Card:	☐
Bank Account Deposit:	☐	All Options:	☐
Primary Contact for questions/ClinCard related concerns:			
Primary Study Contact Name			
Primary Study Contact email & Phone #			
Cost Center Sponsored Program Manager (CCSPM) Name			
CCSPM email			
CCSPM Signature			
<i>Signature is to acknowledge Billing Worktags</i>			
Billing & Workday Details			
Workday Driver Worktag - Participant Payments & Transaction Fees			
Workday Driver Worktag - Blank Cards:			
Must be a dept/other non-GR worktag if the study worktag is Federal in WD			
Workday Driver Department Backup Worktag - in case of issues			
Participant Payments are billed to	8255: Other Expenses: SC08751 Research Participants Payments, SC08750 Research Participants Transportation, SC08749 Research Participant Meals, SC08752 Research Participant Incidentals		
Blank Cards and Transaction Fees	8730: Other Fees for Service: SC08811 Other Outside Services		
Central Administrator Roles – These roles cannot be given to study teams at this time			
Approver	Approve payments requiring approval: miscellaneous or travel related.		
Administrator	Add/edit studies, add/modify payment schedules, create/edit users, assign user roles. Approvals & Voids. Greenphire removes users.		

ClinCard Portal Access Options

User type	Description of Access in ClinCard Portal	Authorized Staff (Users)
Coordinator	Register/Edit participants, issue/load ClinCard, set appointments.	Selected by study site
Reports Viewer	Able to view study-specific reports: payments by study or participant.	Selected by study site

Access can be **ONLY** with the official UM LoginID email address. Check it at: <https://caneidhelp.miami.edu/index.html>

Site Coordinator Minimum one person. Recommended as few as feasible.

Reports Viewer No minimum number. Recommended one person. Can be the same as Site Coordinator.

Name:	Coordinator ☐
Title:	Reports ☐
LoginID Email:	Phone #:

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LoginID Email:	Phone #:

Payment Schedule – Please be detailed and enter all planned payments

Should be consistent with the consent form. Each payment name must be unique and is usable once only.

Payment Name:							
Amount:	\$	\$	\$	\$	\$	\$	\$
Payment Name:							
Amount:	\$	\$	\$	\$	\$	\$	\$
Payment Name:							
Amount:	\$	\$	\$	\$	\$	\$	\$
Payment Name:							
Amount:	\$	\$	\$	\$	\$	\$	\$
Payment Name:							
Amount:	\$	\$	\$	\$	\$	\$	\$