

WELCOME



Data Managers Interest Group (DMIG)

June 1, 2023

**JHU Clinical Research Investigator
Resources - Session #5**

Community and Patient Outreach

We will begin promptly at 12:00 pm

Welcome to the DMIG Session #5



Agenda:

Moderator: Todd Nesson, MS, CHRC

Title: Community and Patient Outreach

- **Language Services:**

Tina Tolson, MSN – Senior Director of Language Services

- **Recruitment Innovation Unit (RIU):**

Cassie Lewis-Land, MS – RIU Program Administrator

- **Community Collaboration Core (CCC):**

Cyd Lacanienta, MSW – Assistant Director CCC

- **Greenphire (Clincard):**

Josh Abel, CPCP – Cards and Expense Supervisor

To find previous DMIG
webinars and other
past ICTR recorded
events please visit:

<https://ictr.johnshopkins.edu/all-events/presentations/>

Join the DMIG Microsoft Teams



- Join the ICTR Data Managers Interest Group Microsoft Teams group:
[To join DMIG MSTeams Click Here](#)

Or go to MS Team and type for ICTR Data Managers Interest Group in the search bar at the top of the page.



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INSTITUTE *for* CLINICAL &
TRANSLATIONAL RESEARCH

Optimizing Outcomes When Working with Language
Services

Presenter:

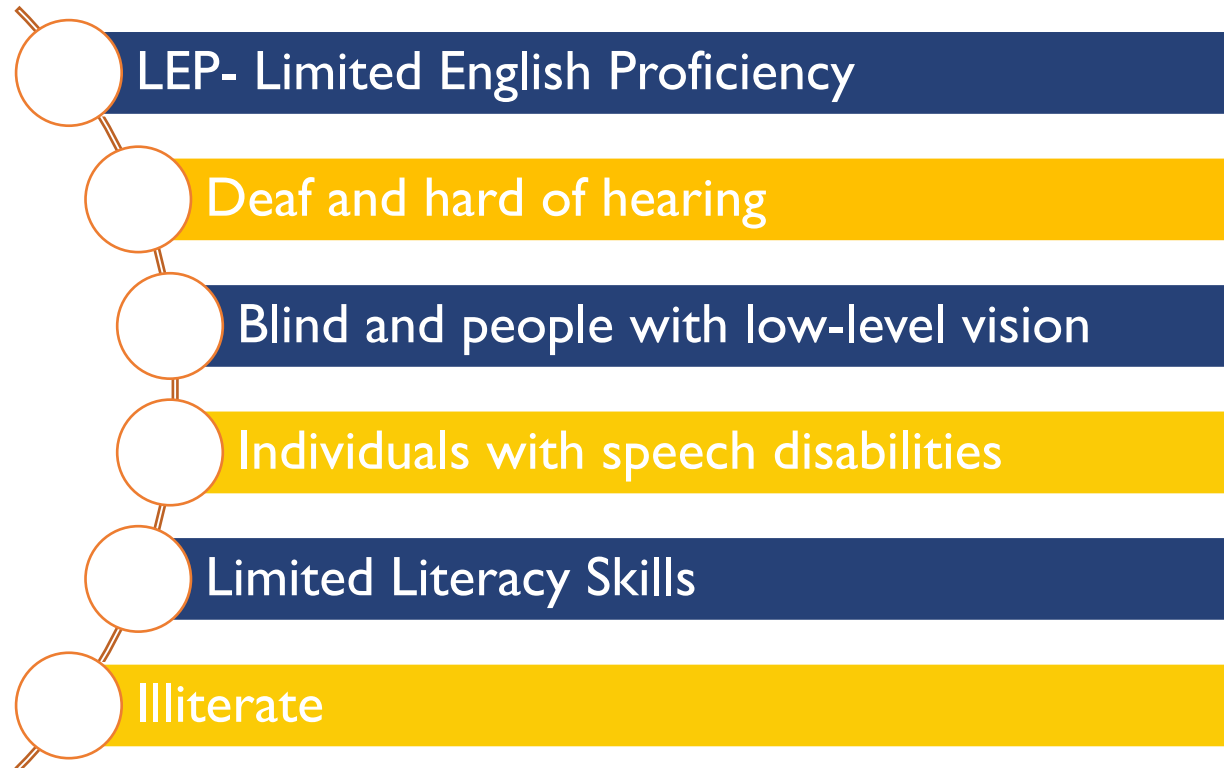
Tina Tolson, RN, MSN, NE-BC

Optimizing Outcomes When Working with Language Services

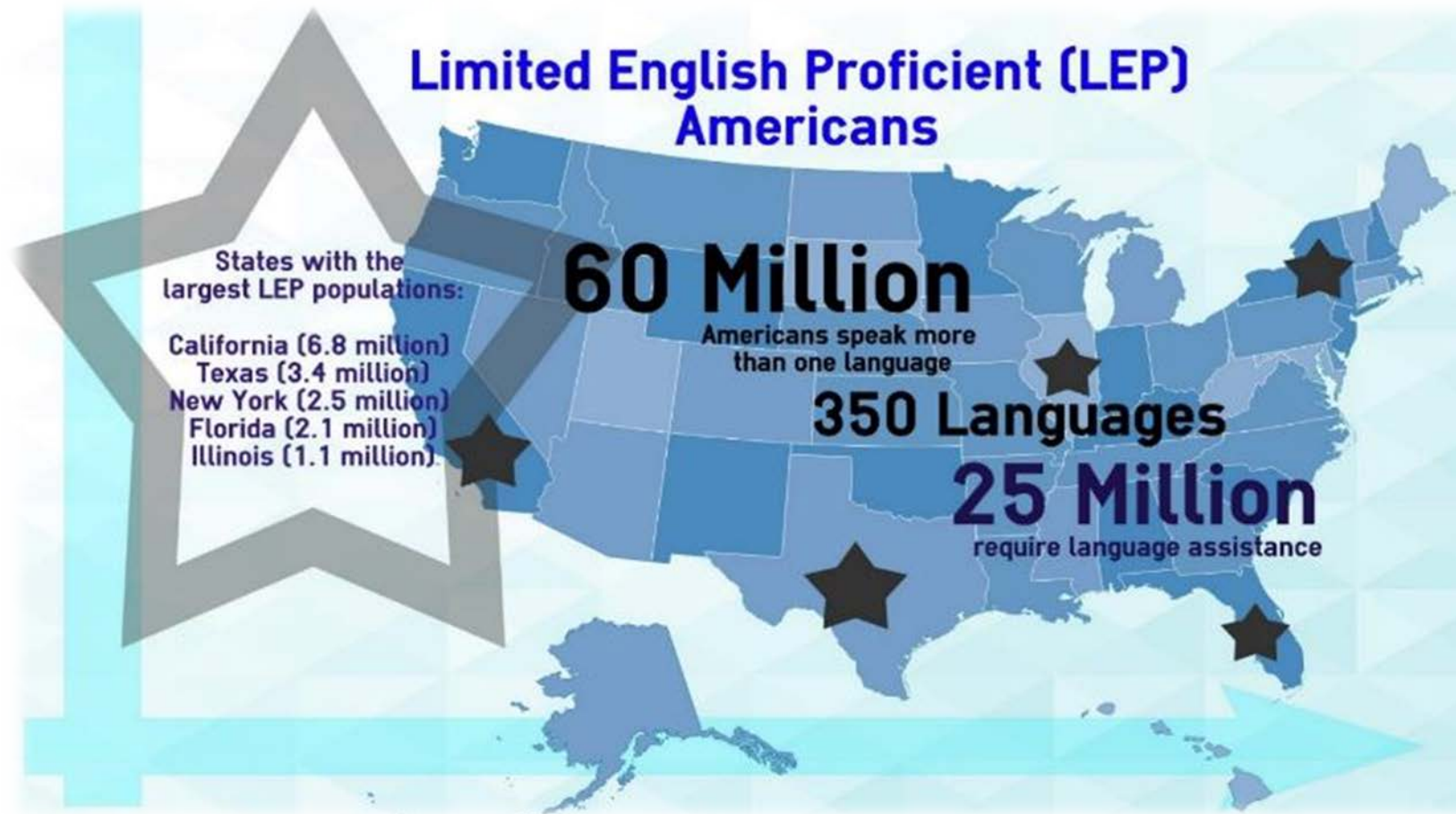
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Language Services: Populations with Communication Needs

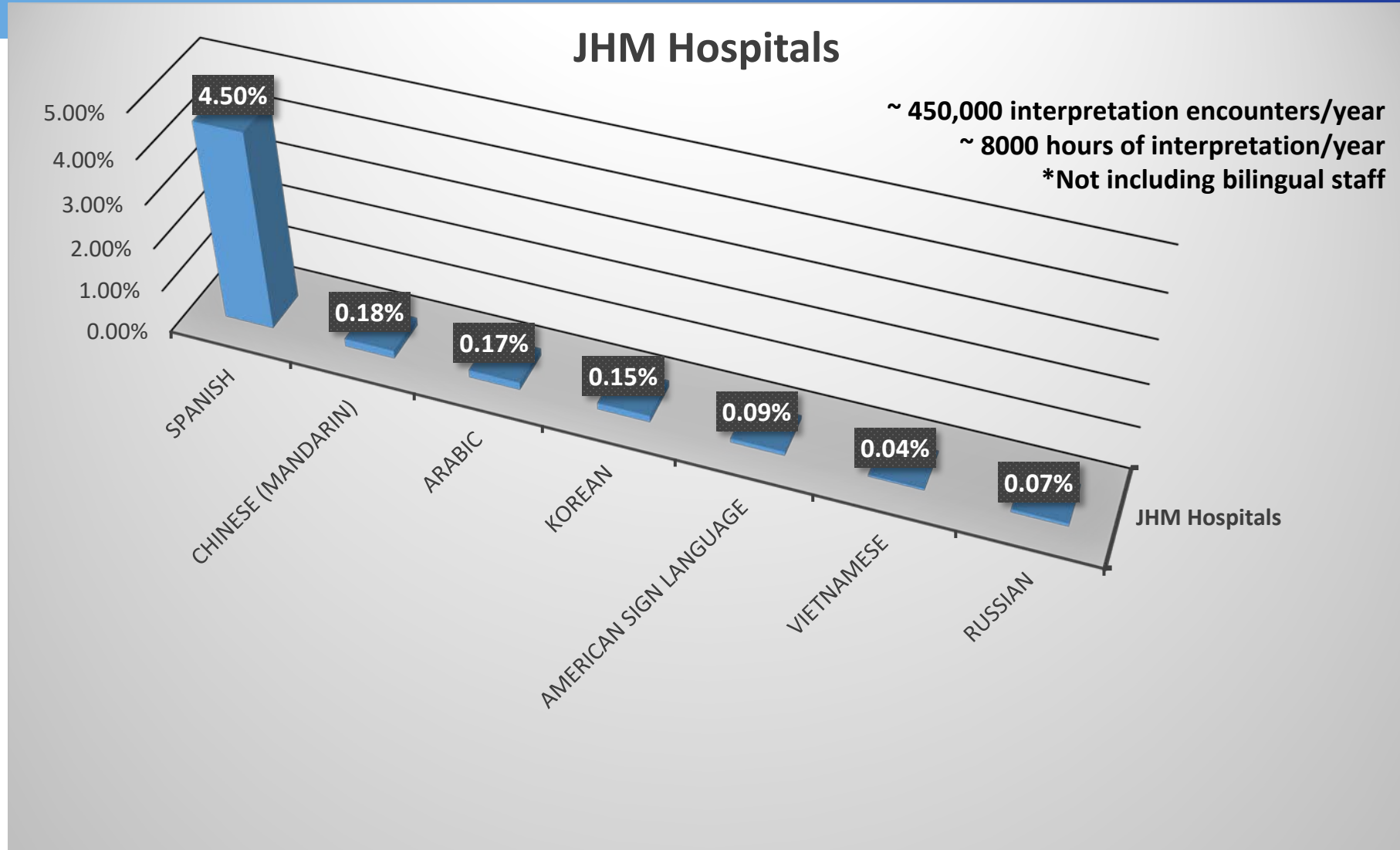


Limited English Proficient (LEP) Americans



<https://www.brookings.edu/blog/brookings-now/2014/09/24/six-questions-about-the-limited-english-proficient-lep-workforce/> English Learners | White House Initiative on Advancing Educational Equity, Excellence, and Economic Opportunity for Hispanics

Top Languages (2022) JHM (% of Patients)



Language Services Fast Facts



Corded



Cordless



Grey Avaya with extra handset

Over-the-Phone Interpretation (OPI)

- direct access to interpreter services
- Instructions are displayed on the phone



Video Remote Interpretation (VRI)

- Real-time, video-based communication through off-site qualified interpreters, available within minutes.
- Device is available to most departments
- Instructions are attached to the cart.



VRI iPads

- About 30 languages, including sign language, available in video.
- About 200 languages available in audio.



In-person, spoken



In-person, sign language

In-Person Interpretation (IPI)

- schedule an in-person spoken or sign language interpreter (ASL)
- Response may take up to two hours, depending on the language

Call **410-614-4685** for interpretation services (available 24/7)

There are 200+ languages available for OPI and VRI.
Languages are limited for in-person interpretation.

Another Approved Modality: Qualified Bilingual Staff Member

An individual who complies with regulatory practices and can competently deliver language services to patients/families/friends with Limited English Proficiency.

Qualified Bilingual Staff Speaker

Staff qualified for direct communication **within their scope of practice**



Qualified Bilingual Staff Interpreter

Staff qualified for direct communication and **basic level medical interpreting**



Professional Medical Interpreter

Out of scope for the JHM Bilingual Staff Program



What We Do: Language Services

Coordinate Interpretation and Translation Resources:

- **Interpretation:** The process of understanding and **re-expressing a spoken or signed message** accurately and objectively in another language with the purpose of enabling communication between two or more individuals who do not speak each other's languages.
- **Translation:** The process of **exchanging written text** in one language to written text in another language.

Qualify Bilingual Staff:

- Assess and train healthcare staff members to **verify proficiency in a non-English language**, so that they can provide **safe and effective, and legally compliant clinical care** to LEP patients in the target language.

Promote Effective Communication and Quality Outcomes:

- Partner with clinical, quality, safety, service, legal, regulatory and health equity departments to promote programs, tools and resources to effectuate change and promote quality outcomes for our deaf and limited English proficient patients.

Why We Do It

Why is it important to provide communication with a qualified interpreter through an approved modality?

Language services must be provided free of charge to patients, family members, and friends due to federal acts (Civil Rights Act of 1964, Americans With Disabilities Act (Effective Communication-2010) and the Affordable Care Act (Section 1557, 2010), as well as, the regulatory commission, and per Johns Hopkins policy.

Why We Do It

Healthcare Disparities & LEP Patients

- Increased length of stay (LOS) in hospital and ED (adults and children)
 - Difference in LOS reduced with documented professional interpreter use at admission & discharge
- 30-Day Readmission rate higher
 - Use of interpreters reduces readmissions
 - Studies report professional interpreter use at admission and discharge is low (14-40%)
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Summary

- Language matters! Report adverse events.
- Interpreters are a critical component to ensuring our patients communication needs are met.
- Utilize the approved modalities to help our patients and to help you.
- Document, document, document! Ensure the electronic medical record has accurate information about patient language and any cultural or literacy needs.
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Optimizing Outcomes When Working with Language Services

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THANK YOU

JOHNS HOPKINS MEDICINE
LANGUAGE
SERVICES

**Optimizing Outcomes When Working with
Language Services**

Presenter:

Tina Tolson, RN, MSN, NE-BC

Optimizing Outcomes When Working with Language Services

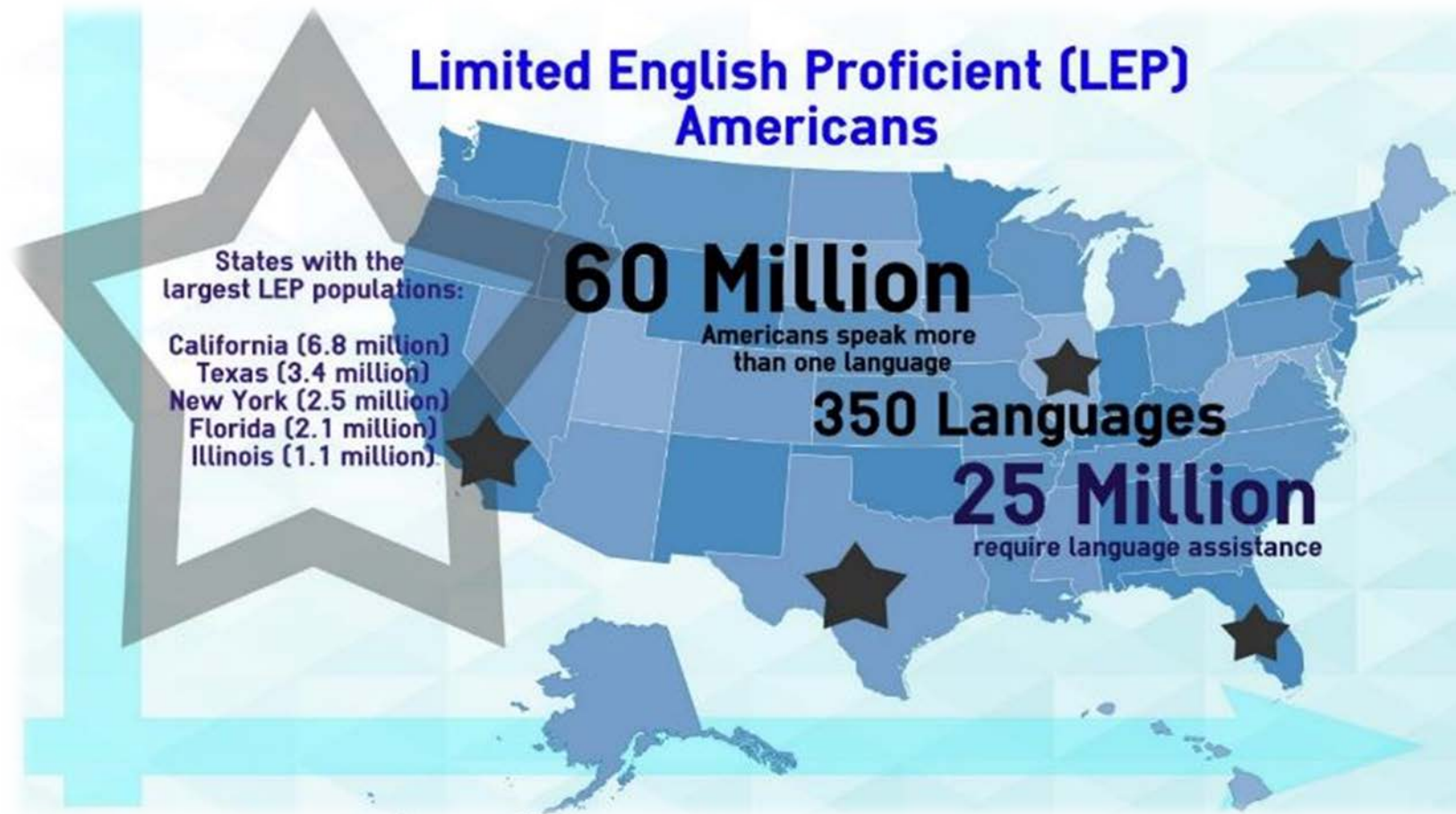
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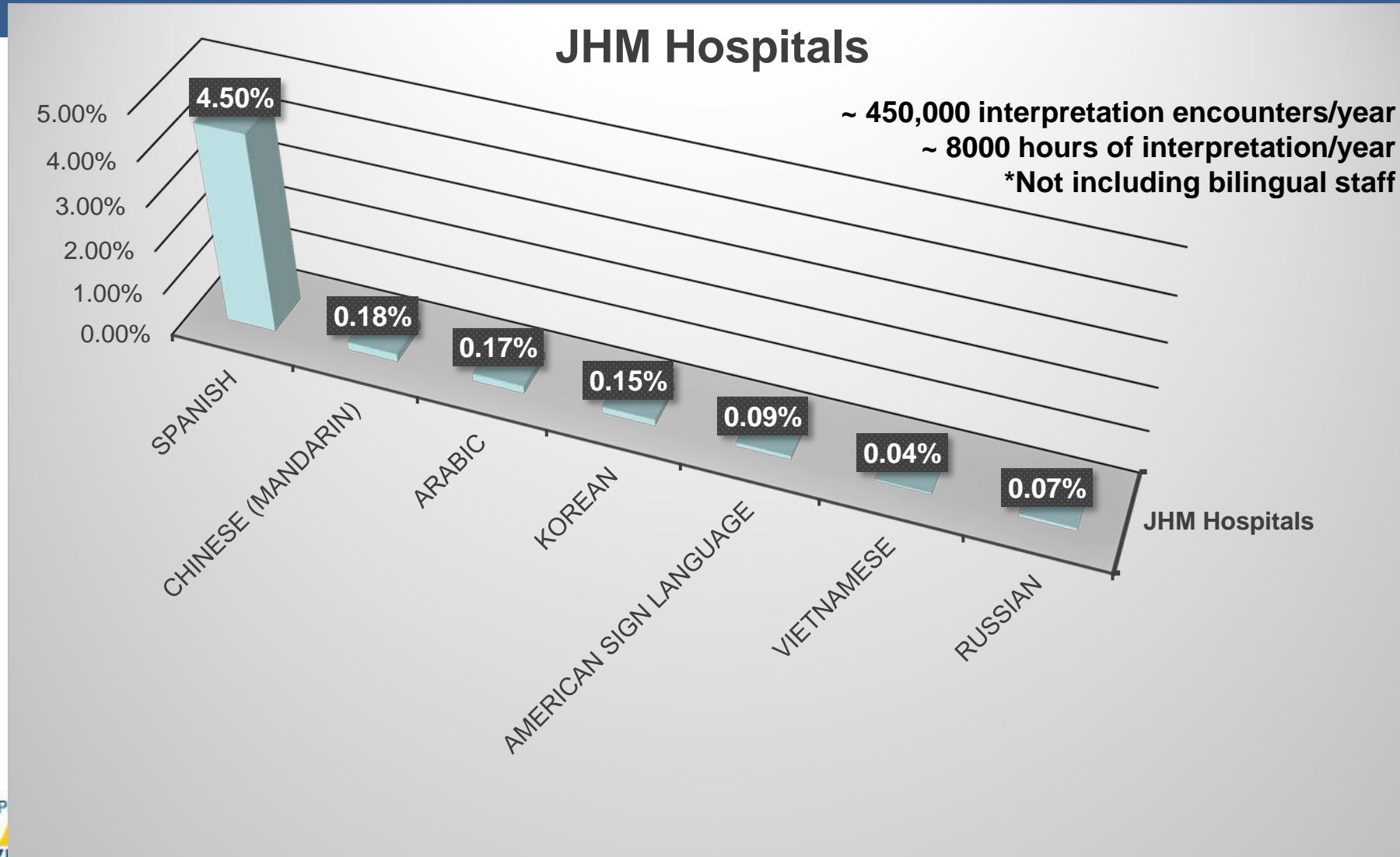
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Use this simple tool to determine the native language of your patients or their preferred language of communication. Ask your patients to point to the language they speak. I speak...

American Sign Language	ᄒᄒᄒᄒᄒᄒ
Amharic	እኔ እማርኛ እናገለግላለሁ።
Arabic	أنا أتكلم العربية
Bengali	আমি বাংলা বলতে পারি।
Burmese	ကျွန်တော်မြန်မာစကားပြောပါသည်။
Cantonese	我講廣東話。
Chin	Chin holh in ka holh
Farsi	من فارسی صحبت می کنم.
French	Je parle français
Greek	Μιλώ Γαλλικά
Haitian Creole	Mwen pale Kreyòl Ayisyen
Hindi	मैं हिन्दी बोलना/बोलती हूँ
Korean	저는 한국어를 합니다
Mandarin Chinese	我说汉语
Nepalese	म नेपाली बोल्छु।
Polish	Mówię po polsku
Portuguese	Eu falo Português
Punjabi	ਮੈਂ ਪੰਜਾਬੀ ਬੋਲਦਾ ਹਾਂ।
Russian	Я говорю по-русски
Somali	Af Soomaali baan ku hadlaa
Spanish	Hablo español
Swahili	Nina zungumuza Swahili
Tigrinya	እኔ ትግርኛ እናረገግ እየ።
Turkish	Türkçe Konuşuyorum
Urdu	میں اردو بولتا ہوں۔
Vietnamese	Tôi nói tiếng Việt

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THANK YOU



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We offer consultations and services that support efficient and effective research recruitment for researchers.

Our team has expertise with digital recruitment tools and community engaged recruitment strategies.

Recruitment Innovation Unit (RIU)



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TRANSLATIONAL RESEARCH

Recruitment Innovation Unit Services Provided



Services	Brief Explanation of Services	Date Service started
Recruitment Material Graphic Design Service	RIU develops and graphically designs recruitment materials for print and digital distribution focused on diverse participant engagement from varying populations and communities	10/2021
Social Media Recruitment Service	RIU creates and manages paid advertisements, monitors the campaign's progress, and reports the metrics	8/2020
HOPE registry	COVID-19 outpatient research registry enrollment of 17,000 + individuals. Expansion to cardiovascular disease 2023	7/2020
RIU Comprehensive Recruitment Consults	Provides research consultation service and providing help with creating recruitment plans that address challenges	4/2016
MyChart Recruitment	Utilize Epic MyChart patient portal to send recruitment invitations	5/2016

The MyChart Recruitment Service



- MyChart Recruitment Service uses computable phenotyping with Epic to identify study specific eligible patients and patient portal messaging to recruit eligible participants
- Developed out of the need to create and implement standards for protecting patient information in the use of EMR for research
 - Successfully piloted with two studies in early April 2017 and PaTH study cohorts in Fall 2015
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 - Council includes leading ICTR administrators, SON, SOM, IRB leadership, CCDA analysts, Epic Research Team members, and researchers
 - To date the service has been utilized by 94 research teams studying various populations and topics of interest



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Recruitment Innovation Team (RIU)

- 5 team members
- Overall management of the service and carrying out the batch messaging in the patient portal

Core for Clinical Research Data Acquisition (CCDA)

- 2 team member and dept adjuncts
- Writing the SQL query that will produce eligible participants from Epic

Program to Accelerate Clinical Research Using Epic (PACE)

- 1 team member
- Moves the SQL report into live production in the Epic environment so report becomes automated producing new results each time it is run

The **MyChart Recruitment Governance Committee** consists of data analysts, experts in recruitment methods, and clinical researchers. These experts provide oversight of the Service



Steps for obtaining the committee's approval for use of Service:

RIU Administrator, provides the MyChart Recruitment Service screening checklist and a draft of the MyChart recruitment letter for the respective study team to the committee

- This can happen during the monthly committee meeting or via email for urgent requests

Committee members review material in detail and provide concerns to Administrator. These concerns are to be focused on 1. Messaging content, 2. Computational phenotype criteria or 3. Special considerations for the target population

RIU team addresses concern with committee and respective study team and makes changes as necessary to the letter or query development

If no issues exist, or after all issues are addressed, RIU Administrator drafts Letter of Approval (LOA) from committee

Study team submits LOA and MyChart recruitment letter for IRB approval

7-Step MyChart Recruitment Workflow



Color	Team	Contact
Yellow	MyChart Team	Cassie /Anna/Julia/ Tosin
Blue	CCDA	Guanyu Li/ Shipra Sachdeva
Orange	PACE/Epic	Matt Courtemanche/ Deb Green
Green	Study team	Coordinator/PI

Designed by PoweredTemplate

Responsibilities of Teams Using Service



Sign Service Agreement



Completion of Screening Checklist



Messaging Letter



Submit CIR to IRB for approval

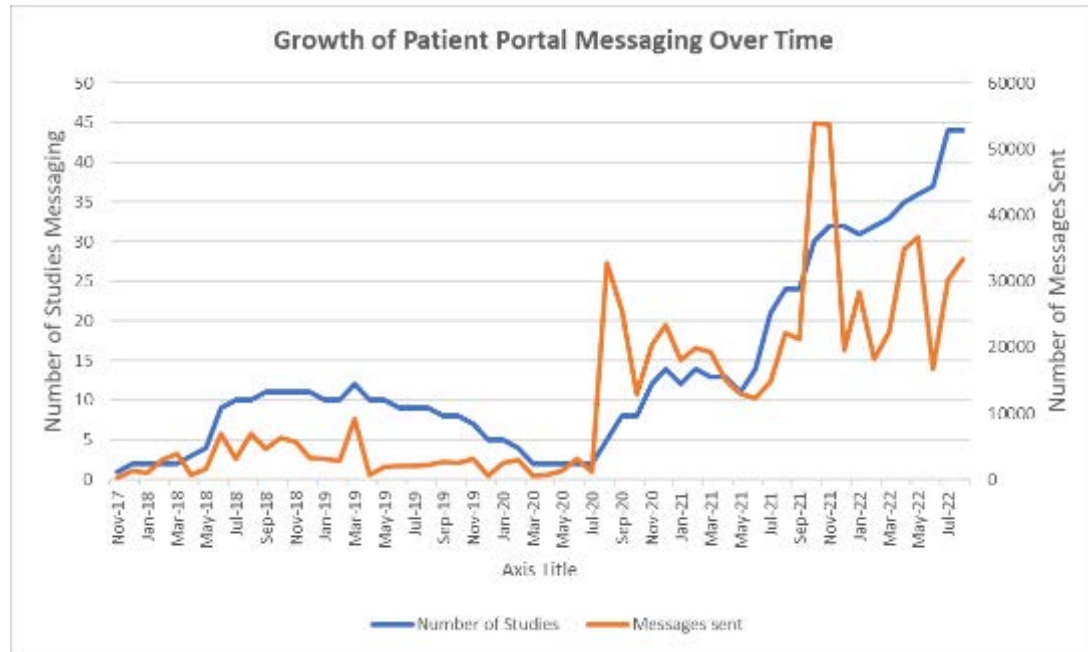


Set up schedule for messaging



Report back response rates to service

Metrics of service usage since COVID-19



The service has grown rapidly since the COVID-19 pandemic forced study teams to reevaluated the recruitment plans

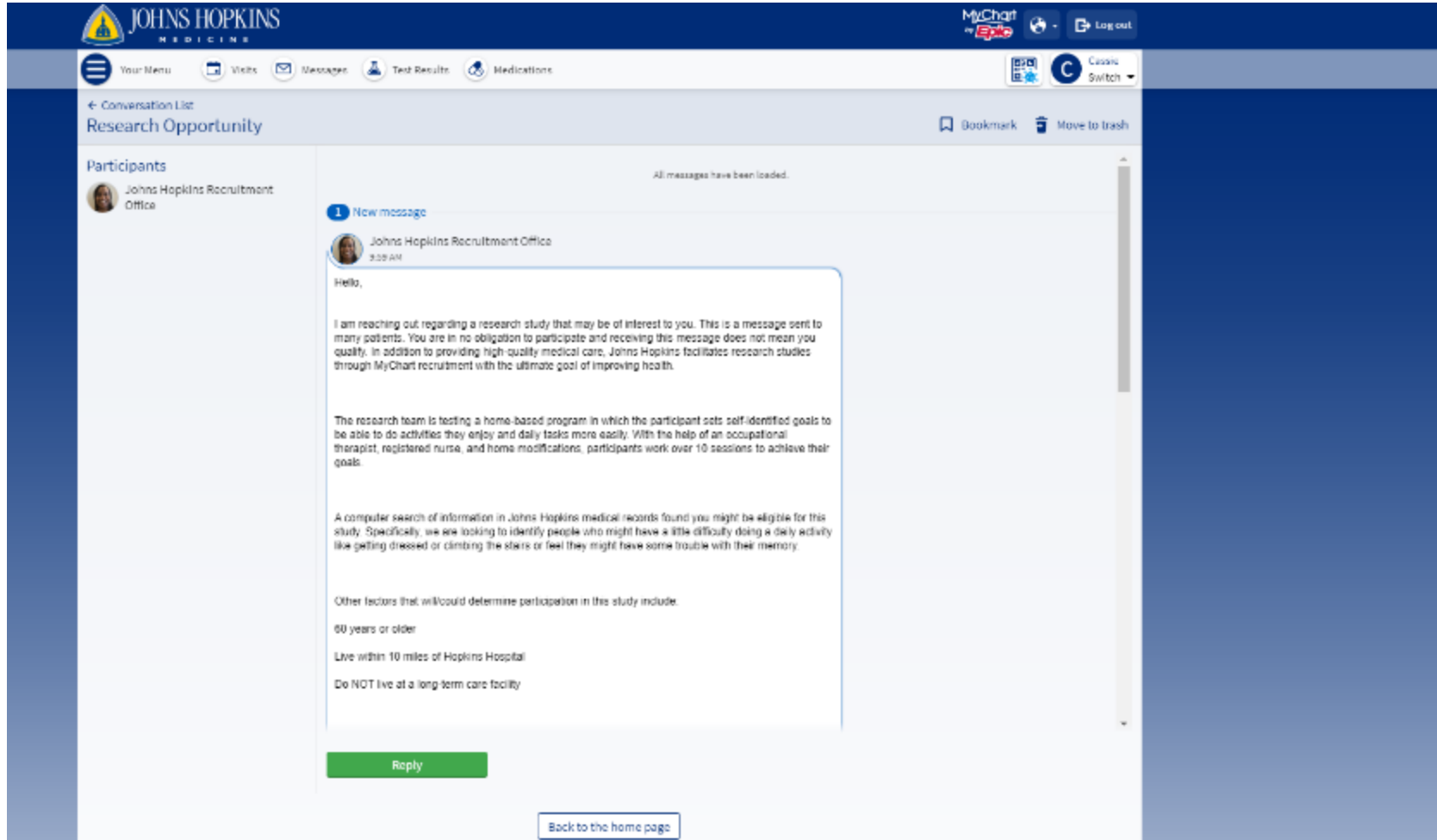
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- **The average response rate is 6.07%**
 - Prior to March 2020: 1.87%
 - After March 2020: 7.04%.
- The response rate among teams who have entirely online studies is 8.66%.
- The response rate for studies seeking healthy volunteers is 2.60%.

Is MyChart Right for your Team/Project ?

Considerations for teams to think about are:

1. Your target population
 - Are they in Epic? → Run a report on TriNetX
2. Are they represented among MyChart Users?
3. Review the demographics of MyChart users
4. Can your eligibility criteria be identified within the EMR?
 - Keep in mind that certain data elements are more difficult/costly to query due to time requirements, such as:
 - flowsheet values (devices, lines/drains, vitals),
 - imaging results and pathology reports contained in semi-structured notes, and
 - socioeconomic indicators such as education level, median household income, homelessness, and whether or not the patients speak English fluently
 - Keep in mind that reports with fewer eligible patients will have a high cost per person
5. Are you using other recruitment methods in tandem to MyChart?
6. Do you have the staff members available to be attentive to inquiries following messages being sent?

Example of MyChart Message



The screenshot shows a MyChart interface with a message from the Johns Hopkins Recruitment Office. The message text is as follows:

1 New message

Johns Hopkins Recruitment Office
3:22 AM

Hello,

I am reaching out regarding a research study that may be of interest to you. This is a message sent to many patients. You are in no obligation to participate and receiving this message does not mean you qualify. In addition to providing high-quality medical care, Johns Hopkins facilitates research studies through MyChart recruitment with the ultimate goal of improving health.

The research team is testing a home-based program in which the participant sets self-identified goals to be able to do activities they enjoy and daily tasks more easily. With the help of an occupational therapist, registered nurse, and home modifications, participants work over 10 sessions to achieve their goals.

A computer search of information in Johns Hopkins medical records found you might be eligible for this study. Specifically, we are looking to identify people who might have a little difficulty doing a daily activity like getting dressed or climbing the stairs or feel they might have some trouble with their memory.

Other factors that will/could determine participation in the study include:

- 80 years or older
- Live within 10 miles of Hopkins Hospital
- Do NOT live at a long-term care facility

Reply

[Back to the home page](#)

Messaging Letters





Only one invitation every 30 days

Patients can opt out and are given a “research opt out flag” on their Epic account right after opting out

Messages are targeted to specific characteristics, so patients are not overwhelmed with messages

Including notification that MyChart may be used for study invitations in Terms and Conditions

MyChart

Your health. Your knowledge. Your connection.



JOHNS HOPKINS
MEDICINE

Terms and Conditions

To proceed, you must agree to the following conditions governing the use of this Web site.

Information maintained on Johns Hopkins Medicine MyChart presents unique security and privacy issues as addressed below. Therefore, certain necessary measures for protecting the security and privacy of such information are the responsibility of the user as detailed below.

The information from your medical record available through Johns Hopkins Medicine MyChart may not constitute your entire medical record. The scope of medical record information accessible through Johns Hopkins Medicine MyChart is determined at the discretion of Johns Hopkins. You will continue to have access to your complete medical record by contacting the office of your health care providers directly. THEREFORE, YOU ACKNOWLEDGE THAT JOHNS HOPKINS MEDICINE MYCHART SHALL NOT BE USED TO MAKE HEALTHCARE DECISIONS OR DIAGNOSIS AND JOHNS HOPKINS SHALL NOT BE LIABLE FOR ANY PERSONAL INJURY, INCLUDING DEATH, ARISING FROM YOUR USE OR MISUSE OF JOHNS HOPKINS MEDICINE MYCHART OR ANY INFORMATION OR CONTENT THEREIN. Remedies under these Terms of Service are sole and exclusive and are limited to those expressly provided for in these Terms of Service.

Johns Hopkins MyChart may be used to send invitations for studies you may be eligible to participate in. For more details on this feature and how to opt out, please [click here](#).

You are not required to utilize Johns Hopkins Medicine MyChart and may discontinue usage at anytime. You acknowledge that Johns Hopkins Medicine MyChart is being provided to you without charge. Therefore, Johns Hopkins reserves the right to terminate your access to Johns Hopkins Medicine MyChart at any time, with or without cause.

Please do not show this page next time

ACCEPT

DECLINE



Why You Received This Message

- You are receiving this message because you were identified by an automated computer search of information in the electronic medical record. While we have tried our best to identify appropriate recipients, please accept our sincerest apologies if this message has reached you in error. Also, please be aware that until this point, no member of the study/research team or the Institute for Clinical and Translational Research has looked at or has access to your medical records. If you would like to speak with one of our team members about this, please feel free to email (study team)email . Thank you for your understanding. For more information about how we protect your privacy and frequently asked questions (FAQs) related to research recruitment through MyChart, please visit <https://ictr.johnshopkins.edu/community-engagement/participate-in-clinical-research/mychart-messages/>

Joining A Study Is Always Voluntary

- Participation in this study is voluntary. If you decide not to be part of this study, it will not change the medical care you receive

How to Unsubscribe from Getting Further Research Messages in MyChart

- To unsubscribe from all future MyChart research recruitment messages, please visit https://bit.ly/optout_recruitmentmessage. To provide feedback on MyChart messaging please visit here: <https://mrprcbcw.hosts.jhmi.edu/redcap/surveys/?s=A9FFAFFCFWDWWPRE>

What happens when a patient responds?



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We have created a REDCap link that can be personalized to each study

These links are embedded into the message for interested patients to complete

After completion, the study coordinator is notified

An affiliated link is sent to the research coordinator to follow up on patient eligibility and enrollment status

These surveys track basic demographics, including race, age, ethnicity and gender and best time to contact the potential participant

On average the process is costing study teams &1,800-\$2,200

The cost covers:

- the creation of the SQL query by CCDA (avg 8-10 hours at \$118 per hour for CCDA programmer)
- movement of report into live production into Epic by PACE team (avg 4 hours at \$118 per hour)
- sending out batch messaging throughout the study teams recruitment period (messaging can be done on custom daily, weekly, bi-monthly schedule according to study teams request)



Feel free to reach out to the RIU



Streamline research recruitment with our expert consultations and services. Leverage our digital tools and community engagement strategies for optimal results.

Cassie Lewis-Land, MS, CCRP
Program Administrator
Recruitment Innovation Unit (RIU)
Clewis4@jh.edu



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MyChart Recruitment Service Update

MyChart by **Epic**



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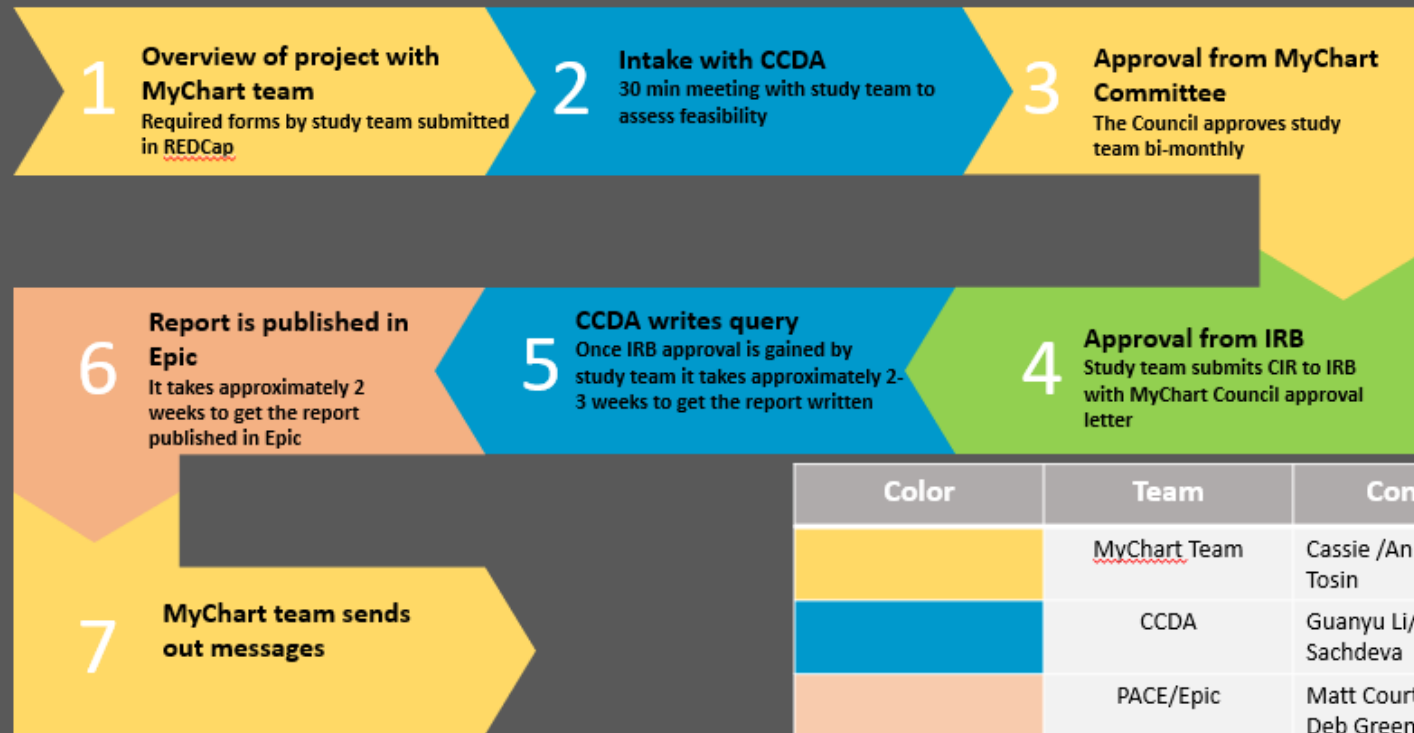
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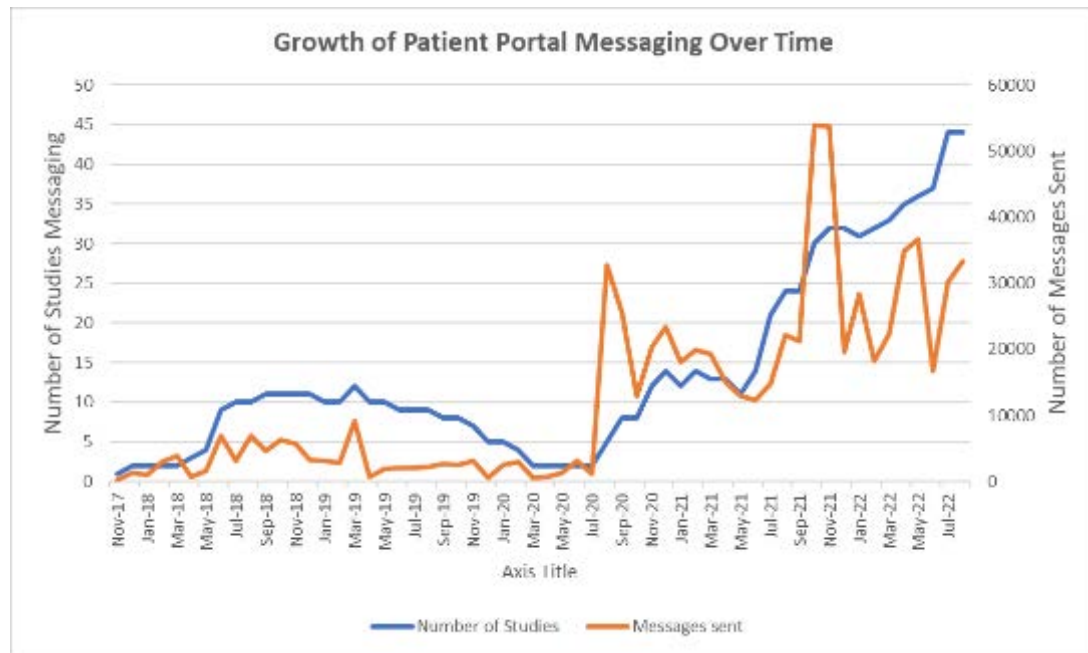
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 - Keep in mind that certain data elements are more difficult/costly to query due to time requirements, such as:
 - flowsheet values (devices, lines/drains, vitals),
 - imaging results and pathology reports contained in semi-structured notes, and
 - socioeconomic indicators such as education level, median household income, homelessness, and whether or not the patients speak English fluently
 - Keep in mind that reports with fewer eligible patients will have a high cost per person
5. Are you using other recruitment methods in tandem to MyChart?
6. Do you have the staff members available to be attentive to inquiries following messages being sent?

Example of MyChart Message

The screenshot shows a MyChart interface for Johns Hopkins Medicine. The top navigation bar includes the MyChart logo, a globe icon, and a 'Log out' button. Below the navigation bar, there are icons for 'Your Menu', 'Visits', 'Messages', 'Test Results', and 'Medications'. The main content area is titled 'Conversation List' and 'Research Opportunity'. On the left, there is a 'Participants' list with a profile for 'Johns Hopkins Recruitment Office'. The message content is as follows:

All messages have been loaded.

1 New message

Johns Hopkins Recruitment Office
3:25 AM

Hello,

I am reaching out regarding a research study that may be of interest to you. This is a message sent to many patients. You are in no obligation to participate and receiving this message does not mean you qualify. In addition to providing high-quality medical care, Johns Hopkins facilitates research studies through MyChart recruitment with the ultimate goal of improving health.

The research team is testing a home-based program in which the participant sets self-identified goals to be able to do activities they enjoy and daily tasks more easily. With the help of an occupational therapist, registered nurse, and home modifications, participants work over 10 sessions to achieve their goals.

A computer search of information in Johns Hopkins medical records found you might be eligible for this study. Specifically, we are looking to identify people who might have a little difficulty doing a daily activity like getting dressed or climbing the stairs or feel they might have some trouble with their memory.

Other factors that will/could determine participation in the study include:

- 80 years or older
- Live within 10 miles of Hopkins Hospital
- Do NOT live at a long-term care facility

At the bottom of the message, there is a green 'Reply' button and a 'Back to the home page' button.

Messaging Letters



Precautions Taken for Patient Experience



Only one invitation every 30 days

Patients can opt out and are given a “research opt out flag” on their Epic account right after opting out

Messages are targeted to specific characteristics, so patients are not overwhelmed with messages

Including notification that MyChart may be used for study invitations in Terms and Conditions

Research Messaging Opt In

MyChart

Your health. Your knowledge. Your connection.



JOHNS HOPKINS
MEDICINE

Terms and Conditions

To proceed, you must agree to the following conditions governing the use of this Web site.

Information maintained on Johns Hopkins Medicine MyChart presents unique security and privacy issues as addressed below. Therefore, certain necessary measures for protecting the security and privacy of such information are the responsibility of the user as detailed below.

The information from your medical record available through Johns Hopkins Medicine MyChart may not constitute your entire medical record. The scope of medical record information accessible through Johns Hopkins Medicine MyChart is determined at the discretion of Johns Hopkins. You will continue to have access to your complete medical record by contacting the office of your health care providers directly. THEREFORE, YOU ACKNOWLEDGE THAT JOHNS HOPKINS MEDICINE MYCHART SHALL NOT BE USED TO MAKE HEALTHCARE DECISIONS OR DIAGNOSIS AND JOHNS HOPKINS SHALL NOT BE LIABLE FOR ANY PERSONAL INJURY, INCLUDING DEATH, ARISING FROM YOUR USE OR MISUSE OF JOHNS HOPKINS MEDICINE MYCHART OR ANY INFORMATION OR CONTENT THEREIN. Remedies under these Terms of Service are sole and exclusive and are limited to those expressly provided for in these Terms of Service.

Johns Hopkins MyChart may be used to send invitations for studies you may be eligible to participate in. For more details on this feature and how to opt out, please [click here](#).

You are not required to utilize Johns Hopkins Medicine MyChart and may discontinue usage at anytime. You acknowledge that Johns Hopkins Medicine MyChart is being provided to you without charge. Therefore, Johns Hopkins reserves the right to terminate your access to Johns Hopkins Medicine MyChart at any time, with or without cause.

Please do not show this page next time

ACCEPT

DECLINE

JOHNS HOPKINS
UNIVERSITY
INSTITUTE for CLINICAL &
TRANSLATIONAL RESEARCH

Mandatory Language in Each Message



Why You Received This Message

- You are receiving this message because you were identified by an automated computer search of information in the electronic medical record. While we have tried our best to identify appropriate recipients, please accept our sincerest apologies if this message has reached you in error. Also, please be aware that until this point, no member of the study/research team or the Institute for Clinical and Translational Research has looked at or has access to your medical records. If you would like to speak with one of our team members about this, please feel free to email (study team)email . Thank you for your understanding. For more information about how we protect your privacy and frequently asked questions (FAQs) related to research recruitment through MyChart, please visit <https://ictr.johnshopkins.edu/community-engagement/participate-in-clinical-research/mychart-messages/>

Joining A Study Is Always Voluntary

- Participation in this study is voluntary. If you decide not to be part of this study, it will not change the medical care you receive

How to Unsubscribe from Getting Further Research Messages in MyChart

- To unsubscribe from all future MyChart research recruitment messages, please visit https://bit.ly/optout_recruitmentmessage. To provide feedback on MyChart messaging please visit here: <https://mrprbcw.hosts.jhmi.edu/redcap/surveys/?s=A9FFAFFCFWDWWPRE>

What happens when a patient responds?



[This Photo](#) by Unknown author is licensed under [CC BY-NC-ND](#).

We have created a REDCap link that can be personalized to each study

These links are embedded into the message for interested patients to complete

After completion, the study coordinator is notified

An affiliated link is sent to the research coordinator to follow up on patient eligibility and enrollment status

These surveys track basic demographics, including race, age, ethnicity and gender and best time to contact the potential participant

MyChart Recruitment Cost

On average the process is costing study teams &1,800-\$2,200

The cost covers:

- the creation of the SQL query by CCDA (avg 8-10 hours at \$118 per hour for CCDA programmer)
- movement of report into live production into Epic by PACE team (avg 4 hours at \$118 per hour)
- sending out batch messaging throughout the study teams recruitment period (messaging can be done on custom daily, weekly, bi-monthly schedule according to study teams request)



Feel free to reach out to the RIU

Streamline research recruitment with our expert consultations and services. Leverage our digital tools and community engagement strategies for optimal results.

Cassie Lewis-Land, MS, CCRP
Program Administrator
Recruitment Innovation Unit (RIU)
Clewis4@jh.edu



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JHU DATA MANAGERS INTEREST GROUP WEBINAR
JUNE 1, 2023, THURSDAY 12-1 PM

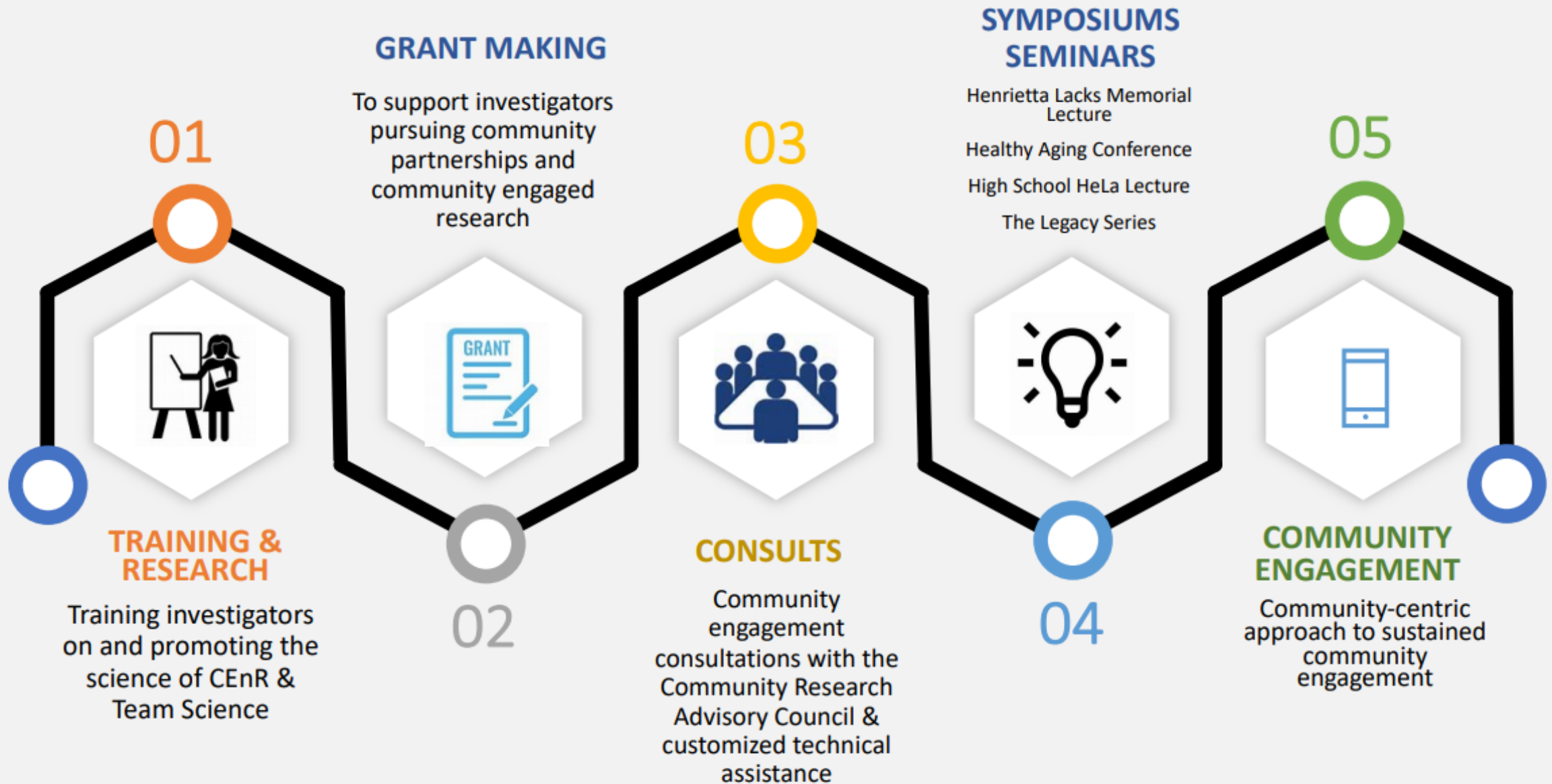
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- **THANK YOU.**

CCC SERVICES



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Training and Research on CEnR and Team Science



STORYTELLING SERIES: SESSION 3
DR. DAVID FAKUNLE
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**WEDNESDAY
MAY 31, 2023
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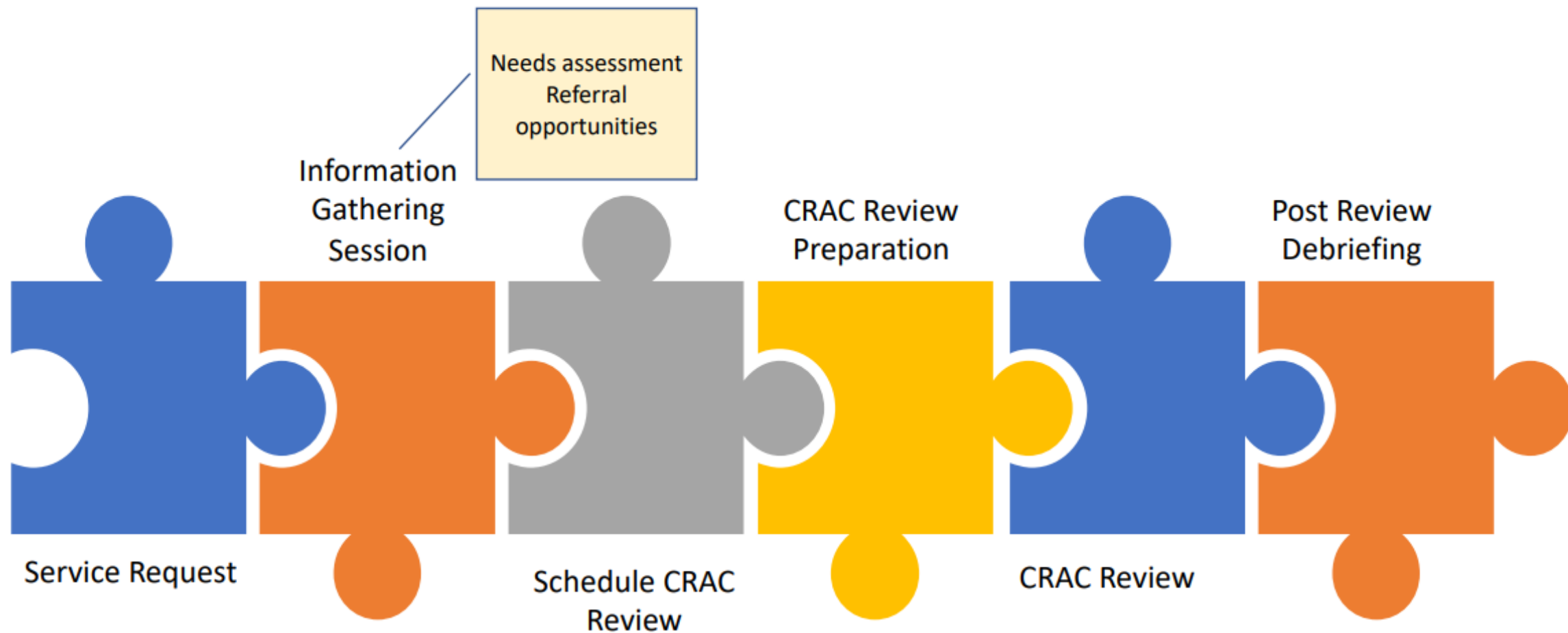
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TEAM SCIENCE AWARD

8	10
16	17
23	24 25
30	31



C-RAC Consult 6-Step Process: CE Technical Assistance





10-Step Framework For Continuous Engagement

PLANNING

- 1: Topic Solicitation
- 2: Prioritization
- 3: Framing the question
- 4: Selection of outcomes

IMPLEMENTATION

- 5: Create the framework
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- 8: Reviewing and interpreting results
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- Dissemination



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A service for researchers investigating the impact of the COVID-19 pandemic.

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 - Dissemination

Day/Time
Mondays, 5 PM – 6 PM


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The C-RAC is part of Johns Hopkins ICTR's community collaboration efforts to provide technical assistance and build the capacity of researchers to rapidly respond and discover solutions to address the COVID-19 pandemic and other health concerns that impact our patients, our neighborhoods, and our communities.

Because we are all in this together.

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Phone: 410.502.3847

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Contact

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Associate Director
Stakeholder Engagement
410-361-7893
clacani1@jh.edu



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https://jhmi.co1.qualtrics.com/jfe/form/SV_1G0ggGE2waEek4e?jfe=new

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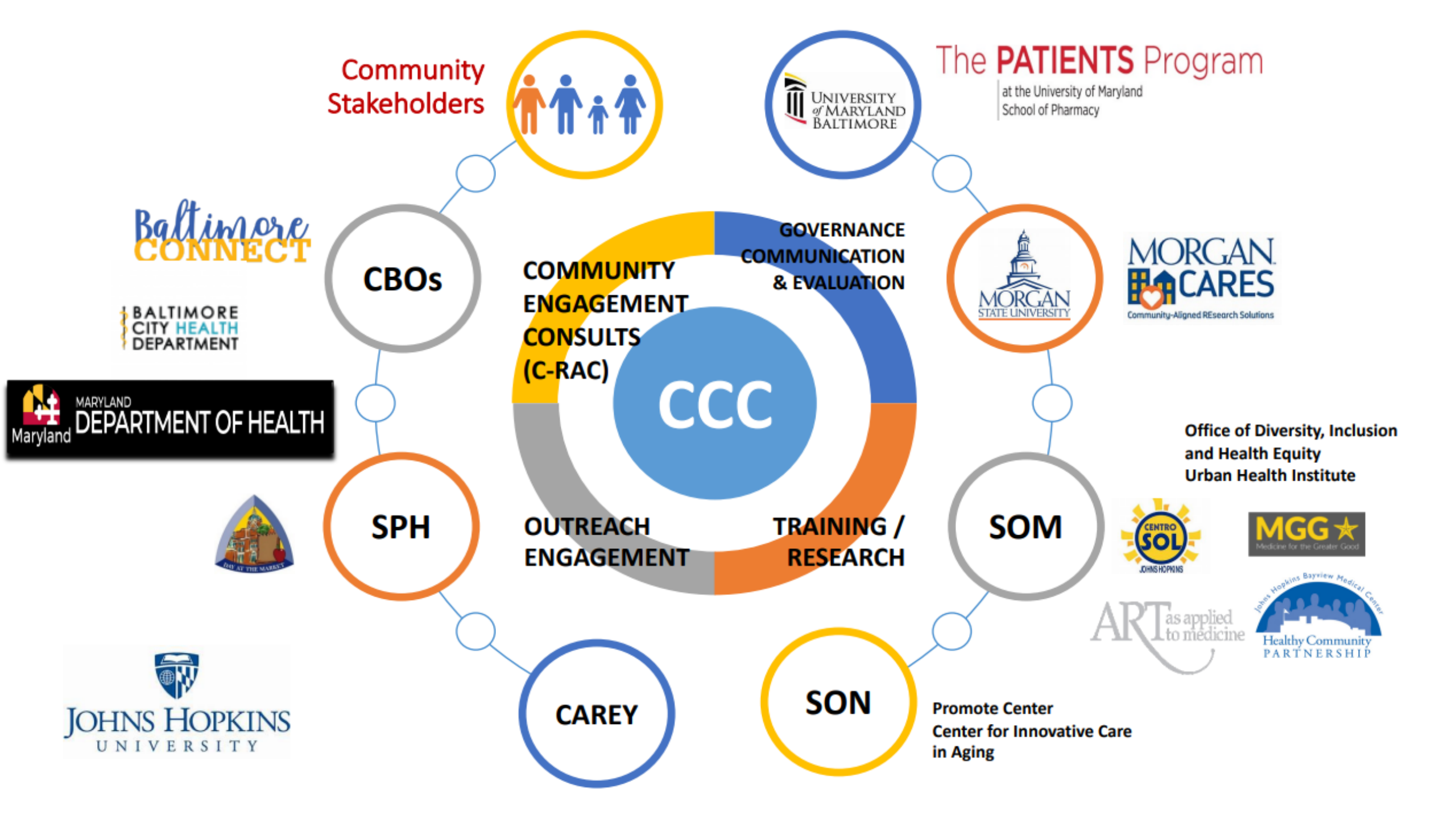
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CEAL
Community Engagement Alliance

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Customized consult services (fee-based)

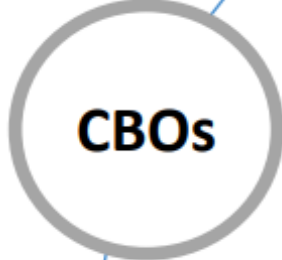
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(C-RAC)

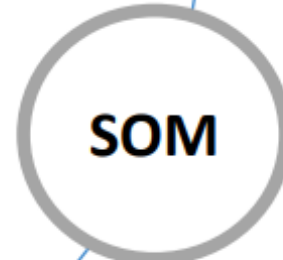


GOVERNANCE
COMMUNICATION
& EVALUATION



OUTREACH
ENGAGEMENT

TRAINING /
RESEARCH



Office of Diversity, Inclusion
and Health Equity
Urban Health Institute



Promote Center
Center for Innovative Care
in Aging



Day at the Market Program



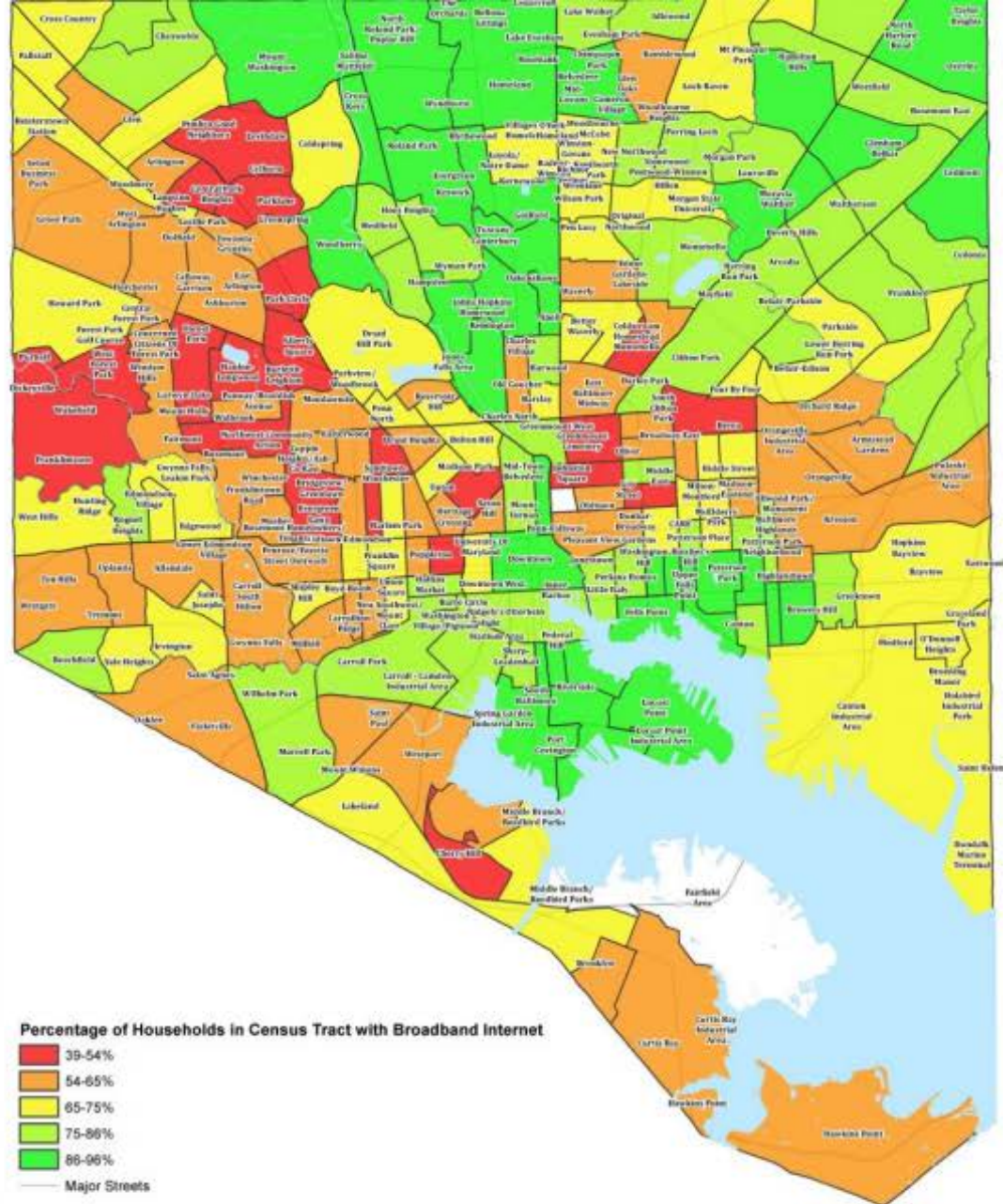
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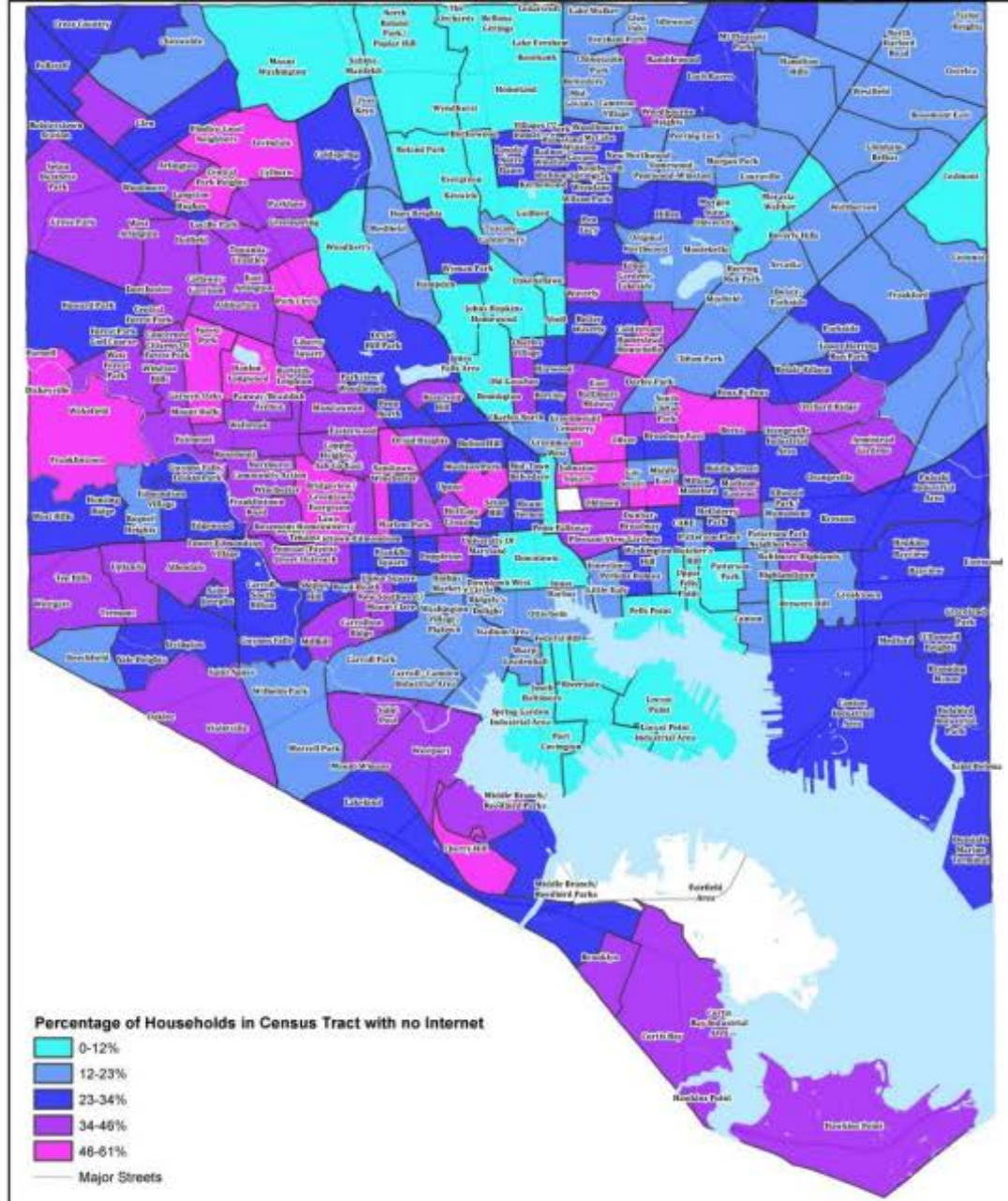
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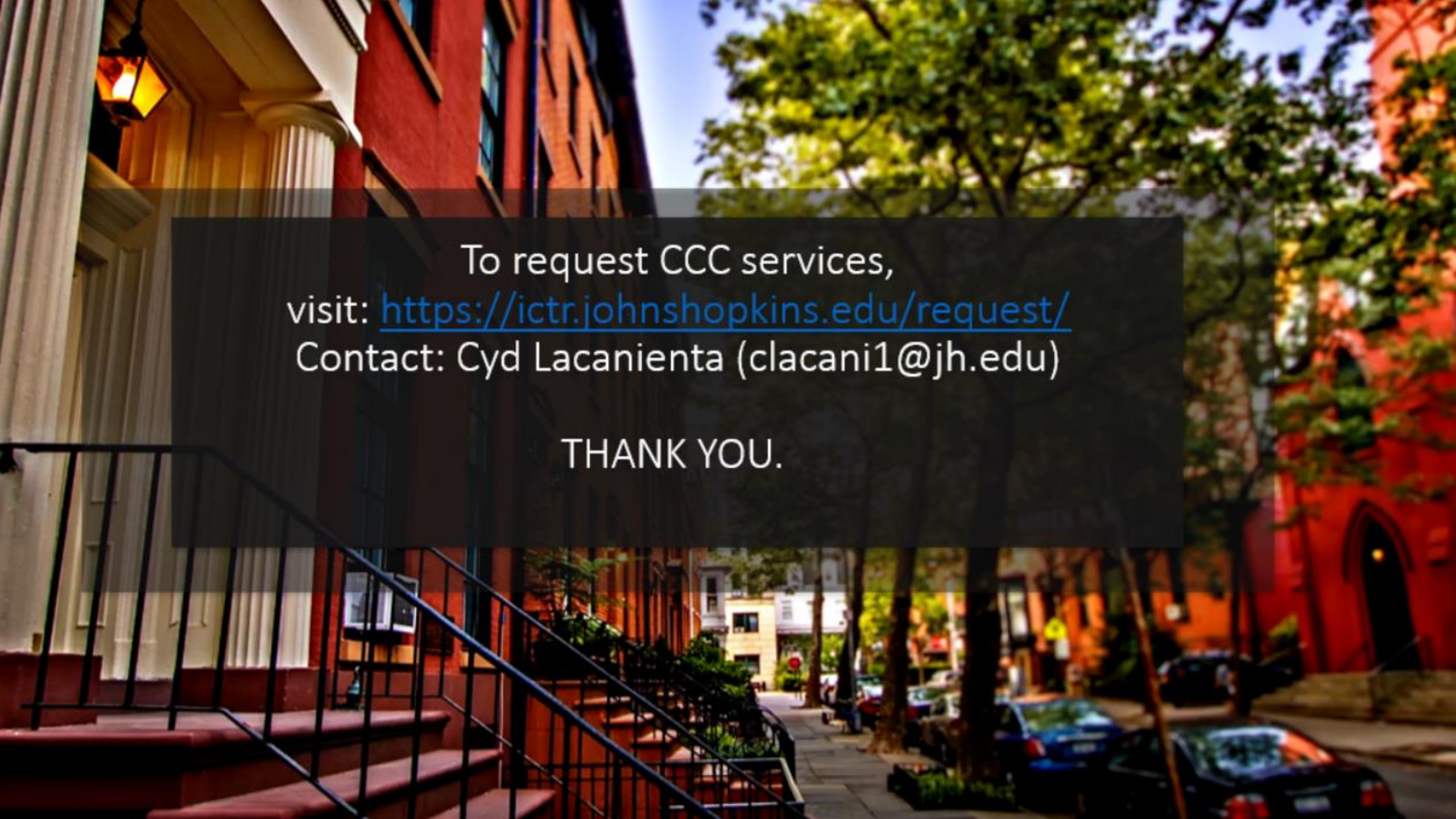




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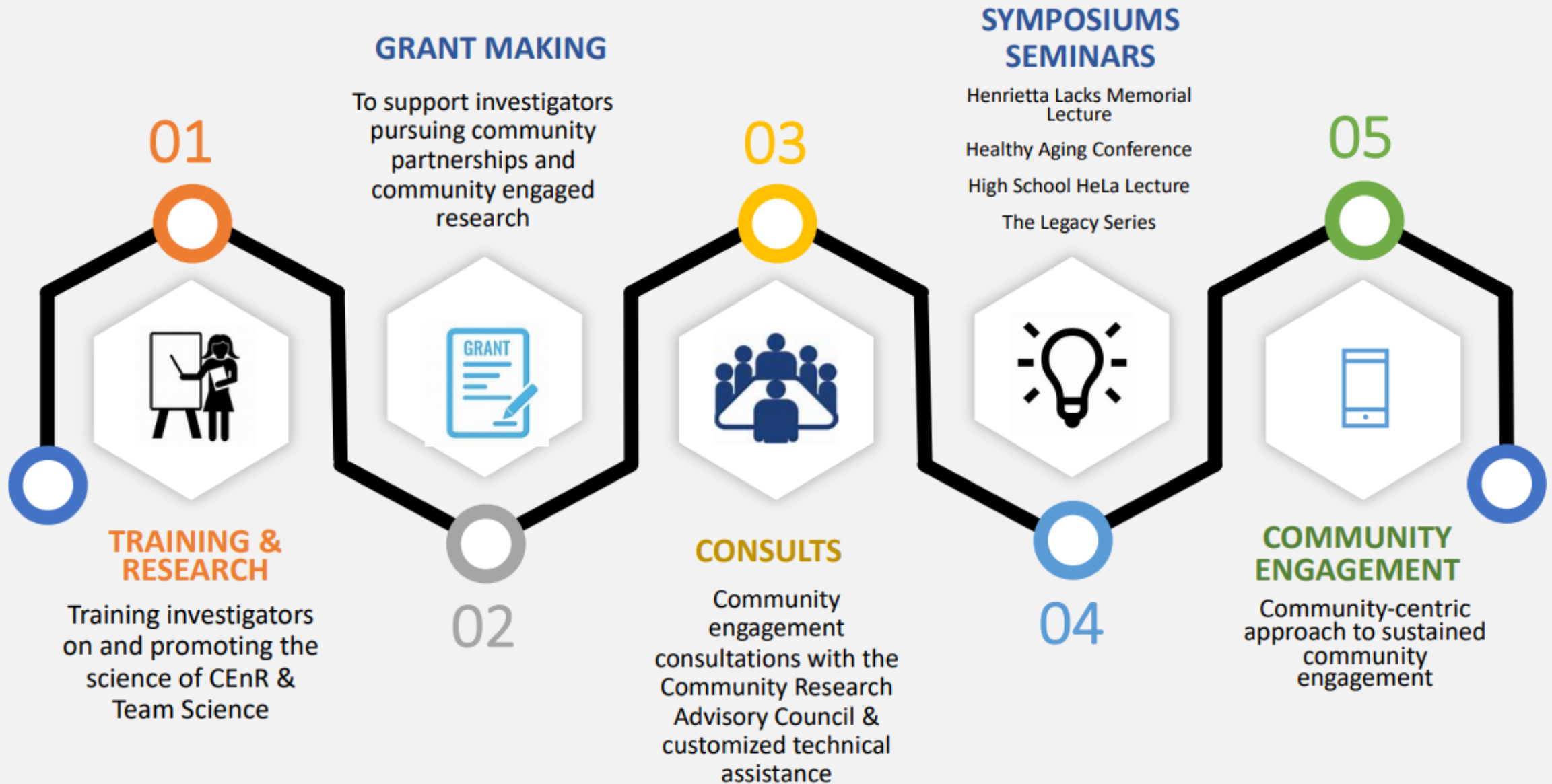
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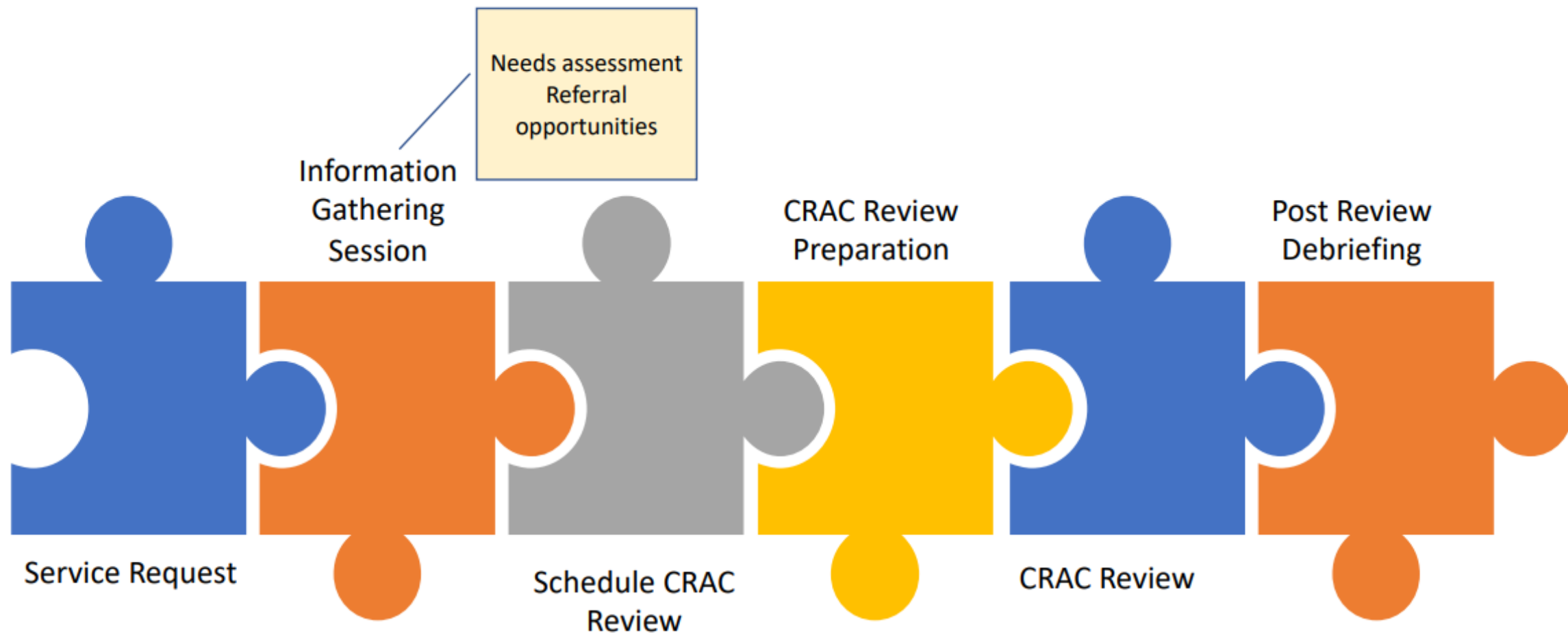
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BUS



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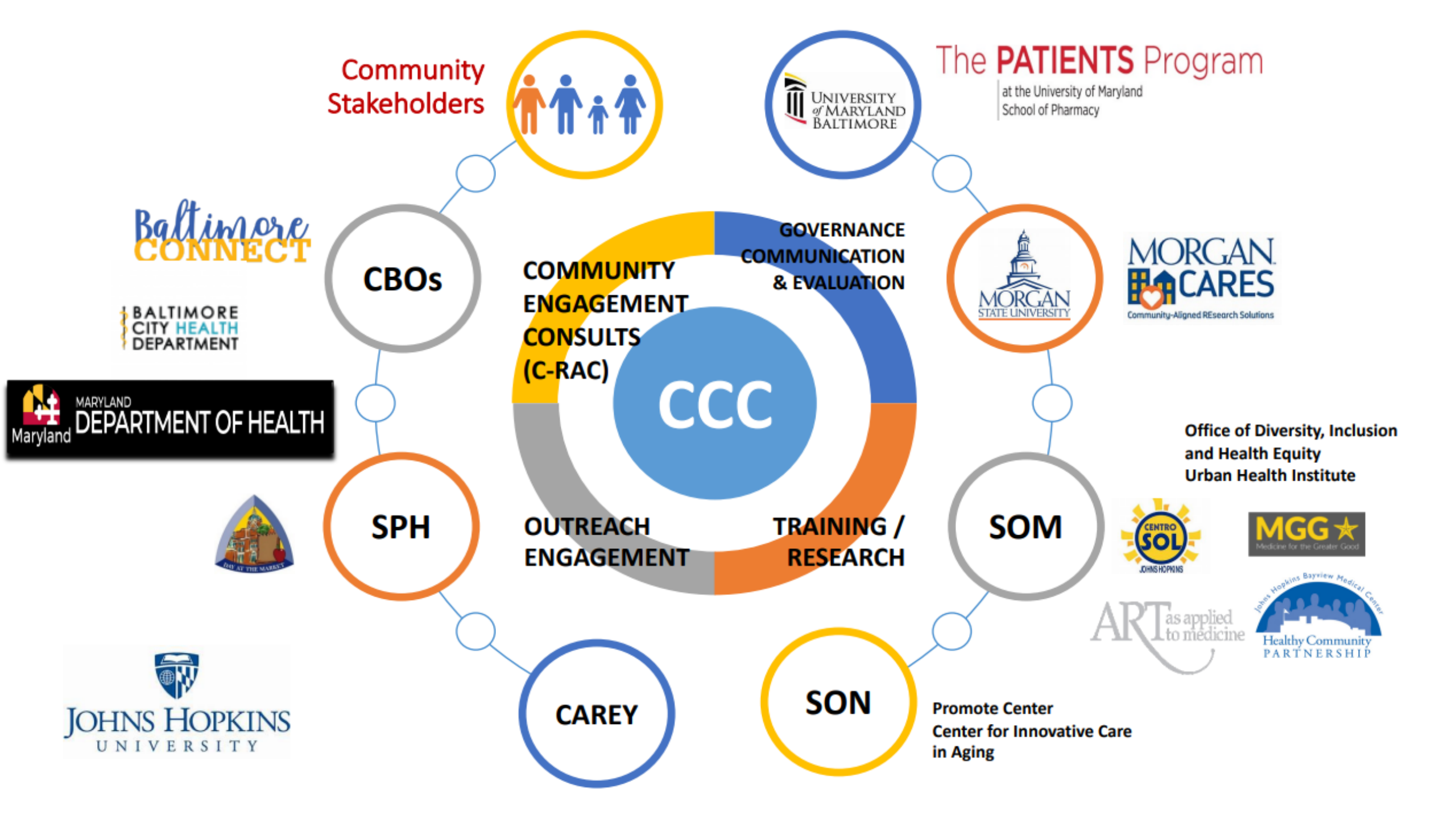
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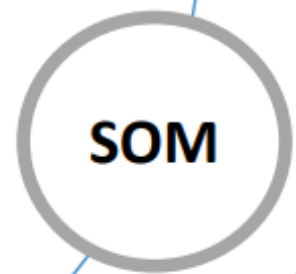
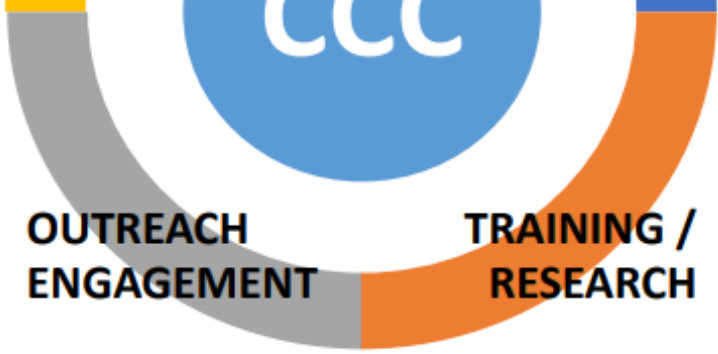
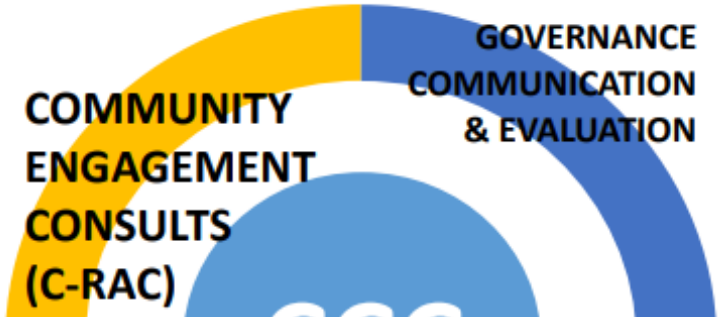
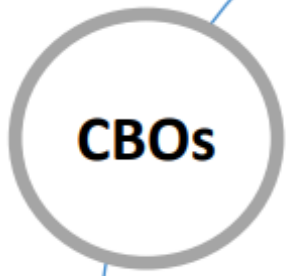
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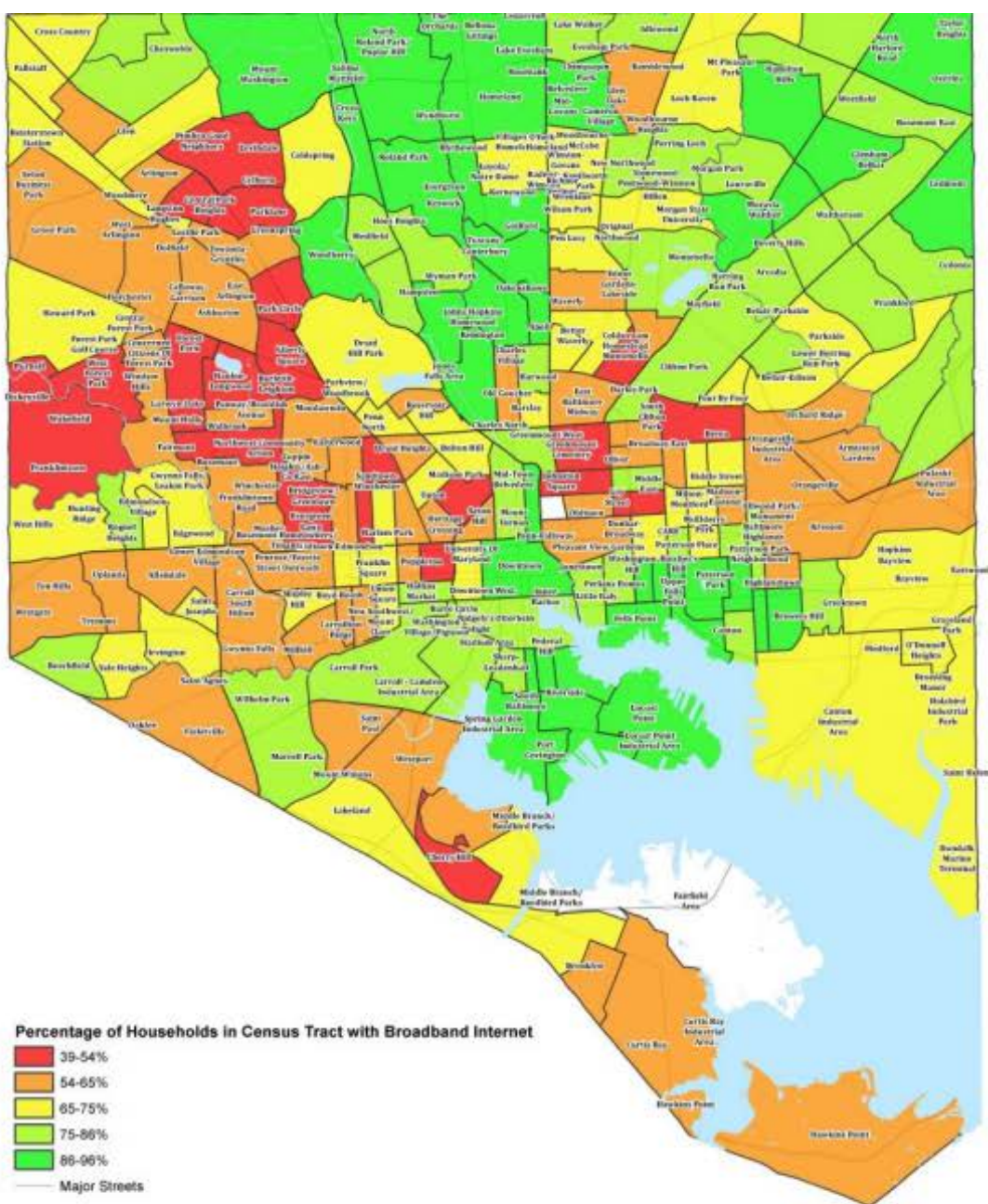
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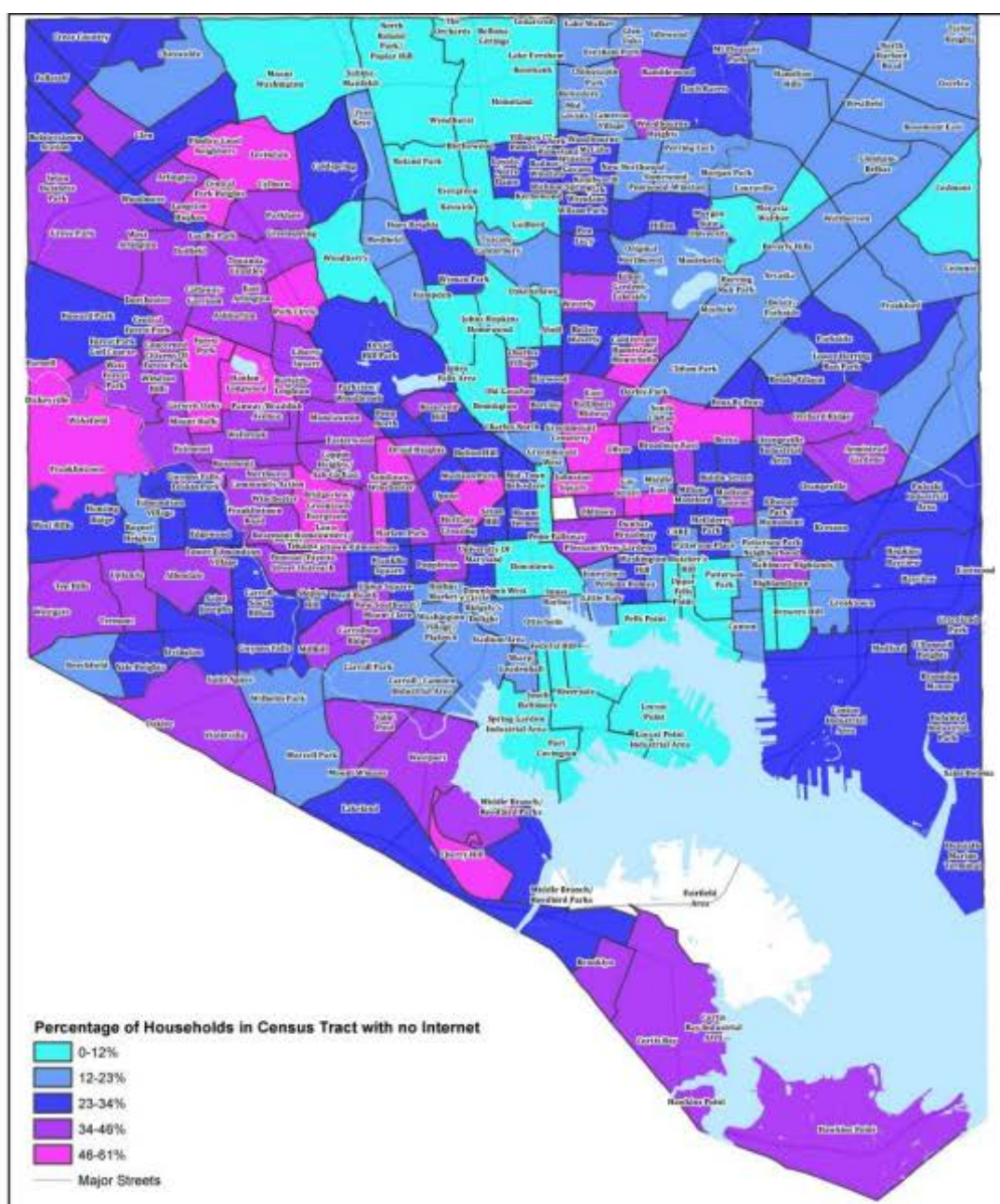
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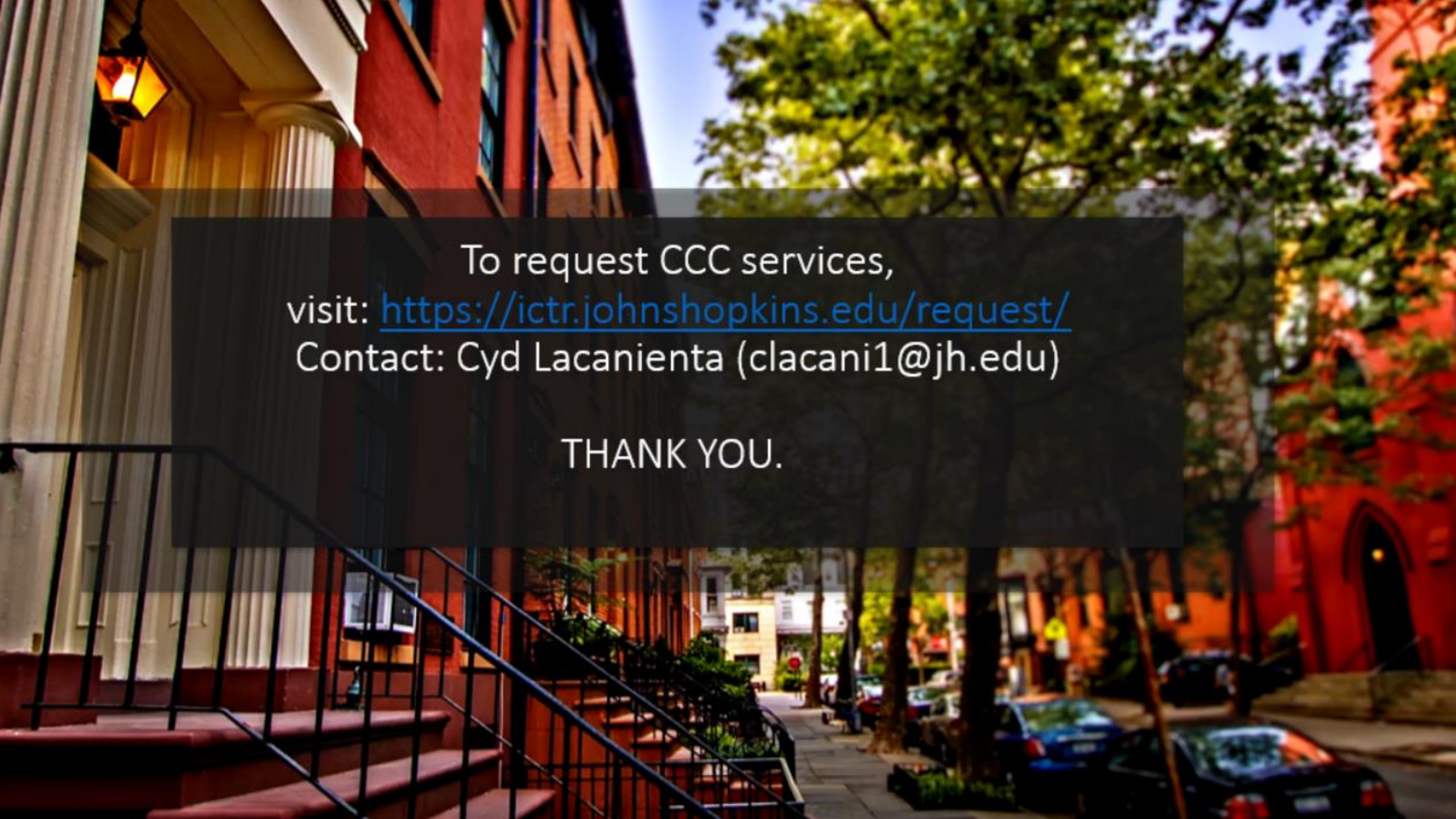




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THANK YOU.

What is ClinCard?



- A software solution designed to help sites reimburse participants more efficiently
- Reloadable debit or virtual cards that allows immediate payments to study participants
- Ideal for paying study participants who will receive \$200 or more cumulatively per study/per year



Key Benefits



- Reduction in admin time and effort for site staff
- Faster payments and reimbursements to participants
- The elimination of managing cash and check payments
- Enhanced participant experience, building stronger engagement and retention
- Visibility and reporting on payments made to participants
- Compliance - 1099 tax reporting for study participants who receive incentives totaling \$600 or more from JHU per calendar year



Sample Physical ClinCard Packet



Virtual Cardholder:
Global Program Name:
Currency: USD
Region: US & Puerto Rico
Card Language: English
Card #: 12345678
Expiration Date:

Get started with your ClinCard with these easy steps:

1. Your ClinCard (physical card) is active when registered to your bank account to send your funds and loaded with \$500.
2. Your ClinCard comes with a pre-set PIN number to use your ClinCard when you shop. Shop at +1 800 957 2795 or online at PIN.
3. Your card can be used:
 - To purchase with participating 3rd parties
 - At any merchant that accepts Visa
 - For online purchases
 - To get cash at ATM or to buy live merchandise and get for an immediate cash (cash advance) card withdrawal from an ATM or bank on your card
 - To transfer available and received on your bank account using the My ClinCard mobile app or website app
4. Please do not discard the prepaid card as this is a reloadable card and unexpired funds may be credited. The card is only reloadable by the program sponsor and is not reloadable by other users. The card is not reloadable. Funds on the card can be used for cash.
5. To help with your card, please contact your manager or visit our website at www.myclincard.mycardspace.com or contact our My ClinCard mobile app at 1-800-957-2795.

Tips on using your ClinCard

- To make purchases, you may want to card or "tap" if you select credit, you will be prompted for your signature if you select debit, pin only.
- Enter your PIN when you receive a purchase.
- The card has a security feature that will allow you to self-activate your card.
- An expired card will not be used for purchases. If you lose your card, please contact your manager and they will advise you on how to deactivate the card.

Important Card Information

- Agreement of your cardholder.
- Your card must be used within the program.

Only 3rd parties can use the card. To make your PIN, please use the mobile app or call the customer service.

The expiration date does not mean the card is no longer valid for use.

Questions? We're here to help!
Live 24/7 Customer Service

Online:
www.myclincard.mycardspace.com

Mobile App:
Download "My ClinCard" in the Apple App Store or Google Play Store

By phone:
+ 1 800 957 2795

ClinCard Program
PG 807 8473
KING OF PRUSSIA, PA 19406

RETURN SERVICE REQUESTED

1A12BCD4 0001 00 1234
CLINCARD
Token #: 12345678
Expiration Date: 09/30

Unique Token Number

Envelope Packet

PREVIOUS PROP CLASS
MPL
LIFE PENDING
PND
MANT



Sample Virtual ClinCard Packet



FAQ doc for participants

Your card was created with card reference number: 373031518440. Please see the [FAQ](#) page for more information on how 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](tel:+18669523795).

Thank You,
ClinCard Cardholder Support

greenplum | My ClinCard

Verify Your Virtual ClinCard

Please provide basic account security your card and use card details, health insurance and 7 more on file. The account holder is 373031518440.

Birth date *

No cardholder

Verify

greenplum | My ClinCard

Your Virtual ClinCard has been activated.

Your Virtual ClinCard has been successfully activated and is ready for use.

Virtual ClinCard

Card number	48864803217966	Currency	US Dollar
Expiration date	02/2024	Cardholder Name	00.00
Card type	APP		

Card information

- Keep your card details safe. If you see an unauthorized transaction on your card, contact customer support immediately.
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Card Fees



Study Participant Card Fees



Replacement Card Fee: \$7
(applicable if not replaced by site)



Inactivity Fee: \$4.50/month
after 6 months of no activity
(resets after usage of the card
or payment applied)



Bank Teller Cash
Withdrawal \$0.00
Fee

- Available at financial institutions that accept Visa cards. (Limited to available balance only)



ATM Withdrawals

- Domestic: \$3
- International: \$4

Study Team Card Fees



Physical Card assigned to study participant: \$4.50 per card



Virtual Card assigned to study participant: \$2.50 per card



\$2.65 loading fee every time a payment is made to the card

TIN Validation



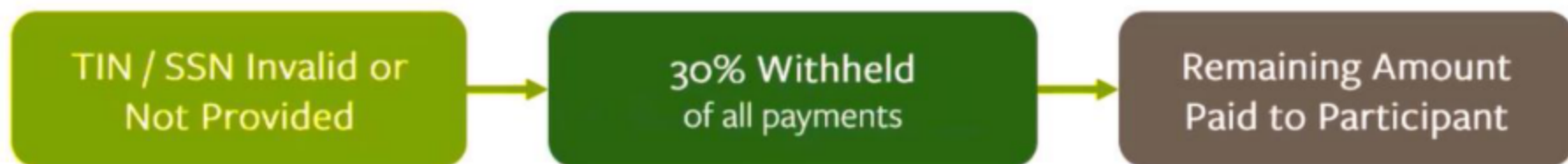
- SSN validated in real time against IRS database for every study
- Verifies the SSN matches the participant's name for 1099 reporting



Tax Withholding



- Automatic Tax Withholding for any invalid SSN and last name
- If TIN/SSN is provided or validated at a later time after payments have already been made, the study participant will not be reimbursed for previous withholdings.



Invalid TIN/SSN = Automatic 30% Withholding From:

- Any stipend/milestone payments
- Any miscellaneous payments
 - Payment outside of the normal list of payment options, such as an unscheduled visit

Reimbursements



Study participants are reimbursed for expenses incurred during a site visit.

- Participants must present an itemized receipt for all applicable expenses.
- The receipt is uploaded to the reimbursement request in ClinCard.
- ClinCard is not a receipt repository – the receipt is uploaded as proof of expense.
- Receipts need to be retained by the site in accordance with the University's financial record retention policy.



Job Aids



[ClinCard Job Aids and Resources](#)

Questions



ClinCardAdmin@jhu.edu

What is ClinCard?



- A software solution designed to help sites reimburse participants more efficiently
- Reloadable debit or virtual cards that allows immediate payments to study participants
- Ideal for paying study participants who will receive \$200 or more cumulatively per study/per year



Key Benefits



- Reduction in admin time and effort for site staff
- Faster payments and reimbursements to participants
- The elimination of managing cash and check payments
- Enhanced participant experience, building stronger engagement and retention
- Visibility and reporting on payments made to participants
- Compliance - 1099 tax reporting for study participants who receive incentives totaling \$600 or more from JHU per calendar year



Sample Physical ClinCard Packet



Questions? We're here to help!
Live 24/7 Customer Service

Online:
www.myclincard.mycardplace.com

Mobile App:
Download "My ClinCard" in the Apple App Store or Google Play Store

By phone:
+ 866-957-3795

Get started with your ClinCard with these easy steps:

1. Your ClinCard Program card is active when registered to your bank account to send your funds and loaded with the card.
2. Your ClinCard money will auto-debit from your bank account to use your ClinCard when you need it. Please call +866-957-3795 to activate your PIN.
3. Your card can be used:
 - To purchase self-administering (SAs) medicines
 - At any participating drug location
 - For online purchases
 - To get cash at a bank or to buy low-cost medicines and get for an additional cost (cash advance) your additional funding on the card based on your card.
 - To transfer available and received on your bank account using the My ClinCard mobile app or website app.
4. Please do not discard the program card as this is a reusable card and account funds may be credited. The card is only reusable by the program unless you are a patient you should have the card in all addresses listed on the card. Cash funds do not expire.
5. To help with your website address, learn how to manage your card at www.myclincard.mycardplace.com by visiting the My ClinCard mobile app or by calling +866-957-3795.

Tips on using your ClinCard

- To make purchases, you may want to "load" or "reload" if you select funds you will be permitted for your signature if you select online purchases.
- Enter your PIN when you receive a purchase.
- The card has a security feature that will allow you to self-activate online.
- An expired card will not be allowed to be used for your online purchases. Please call +866-957-3795 to activate your card.

Important Card Information

- Agreement of your card ownership
- Your card must be used within the program

Only by Customer Service to make your PIN using the mobile app or call the customer service.

The expiration date does not affect the card's use for purchases.

ClinCard User Agreement

ClinCard Program
PG 807 8473
KING OF PRUSSIA, PA 19406

RETURN SERVICE REQUESTED

1A12BCD4 0001 00 1234
CLINCARD
Token #: 12345678
Expiration Date: 09/30

Unique Token Number

Envelope Packet

PROCESSED
PROF CLASS
MPL
LIFE HISTORY
AND
MANT

ClinCard VISA Card

DEBIT VISA

Sample Virtual ClinCard Packet



FAQ doc for participants

Your card was created with card reference number: 373031518440.
Please see the [FAQ](#) page for more information on how to access your card.

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Thank You,
ClinCard Cardholder Support

greenplum | My ClinCard

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Please provide basic account security your card and use card details, health insurance and 7 more on file.

The account ID is 373031518440.

4-digit birth year

Account ID: 373031518440

No cardholder

Verify

greenplum | My ClinCard

Your Virtual ClinCard has been activated.

Card details are shown in table below.

Your Virtual ClinCard has been successfully activated and is ready for use.

Virtual ClinCard

Card number	Expiration date	Cardholder name	Card type
488888888817986	02/2024	Cardholder Name	VISA

Card information

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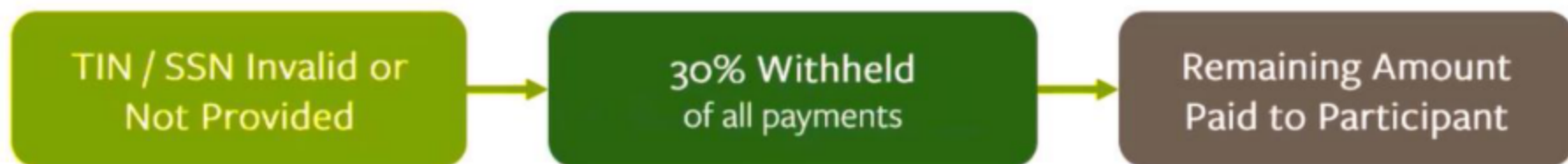
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[ClinCard Job Aids and Resources](#)

Questions



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