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ClinCard, a New Patient Payment Option

A new payment option for clinical trial subjects, ClinCard, will soon be available at UTHealth. ClinCard processes have already been tested in a pilot program involving a few UTHealth departments, and ClinCard will be available institution-wide on May 1, 2016. Christopher Denman presented on ClinCard at March’s Coordinator Forum (video at this link), and based on attendance and the number of questions, it appears that there is great interest in ClinCard.

How does ClinCard Work?
ClinCard is a UTHealth branded credit/debit card that can be used for research subject study payments and reimbursements. ClinCard works just like any other credit or debit card—it can be used for purchases online or at stores, as well as to get cash from an ATM or a cash advance from a bank. ClinCard can also be used internationally.

An Alternative to Petty Cash
The hope is that ClinCard will replace petty cash. Petty cash will still be available, but starting on September 1, 2016, its use will have to go through an approval process, with ultimate approval from the Vice President of Finance and Business Services. This approval will only apply to new studies—if petty cash is currently being used on a study, it will be grandfathered in. Note that approval will not be needed for gift cards.

ClinCard Fees
The card itself costs $3.50, and there is a $1.00 fee each time a payment is loaded to the card. For example, if patients are compensated at $20 per visit, then $24.50 will be budgeted for the first visit ($20 + $3.50 + $1 = $24.50) and $21 for each subsequent visit ($20 + $1 = $21).

How Do I Budget for ClinCard?
Before beginning a study, the study team needs to negotiate ClinCard costs with the sponsor, as well as work with their SPA Contracts Specialist to make sure that the terms agreed to are added to the contract. ClinCard costs can be added to the budget as per patient costs, study start-up costs, or invoicables, all with different benefits. ClinCard can also be used for existing studies, as long as there are sufficient funds to cover the fees.

What is the Process for Requesting ClinCards?
Once the contract is signed and PAF has set up the study account, the site coordinator begins the process by submitting a ClinCard Request Form to SPA’s Systems and Reporting (S&R) team. Among other things, the request form requires PI and DMO signatures and a chartfield string. After validating the request, S&R sets up the project in the ClinCard web portal and sends the authorized ClinCard Request Form to the Bursar’s office. The ClinCards can then be picked up from the Bursar the next day. At that time, the Bursar assigns the ClinCards to the study, so that the cards are associated with that study only.

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What is the Process for Managing ClinCard Payments to Patients?
Once the cards are received, the assigned coordinator can manage payments to patients via the ClinCard web portal. At a study visit, the coordinator assigns the ClinCard number to the patient and loads the payment, and study subjects can then access funds immediately. At each subsequent visit or milestone, the coordinator loads additional payments via the ClinCard web portal.

How is the Study Charged for ClinCard Costs?
A study’s ClinCards are associated with one chartfield string, which is charged for all card fees and patient payments. The day the ClinCards are picked up from the Bursar, the study’s chartfield string is charged the $3.50 card fees. Each week, the chartfield string is charged the amount of payments made to study subjects, and each month, the chartfield string is charged the $1 loading fees.

Reconciliation
At the end of the study, study teams should reconcile the account. The cards are non-returnable, and if there are ClinCards left over after a study is completed, the costs of the card can be transferred to another study or to a designated fund account.

Forms and Information on the SPA website
SPA’s website will provide information on ClinCard, as well as various forms to be used in ClinCard processes, including the ClinCard Request Forms, Personnel Change Form, Participant Payment Form, and ClinCard Inventory Reconciliation Log.

Contact
If you have questions, please contact Christopher Denman at Christopher.Denman@uth.tmc.edu or 713-500-3166.

2015 Report to Faculty and Staff on CPHS Activities
The report is found at this link and gives metrics on number of submissions to CPHS and time to approval.

Upcoming Certification Testing Dates
CCRP certification: For those interested in becoming a Certified Clinical Research Professional, the next exam in Houston is at Methodist Hospital on August 6, 2016 with a registration deadline of June 25, 2016. You can find more information here.

CCRC certification: The next exam dates for certification as a Clinical Research Coordinator (CRC) are in September and October of 2016. Applications are due by August 15, 2016, and you can find more information here.
Congratulations, Audrey, on the Promotion!

We are pleased to announce that Audrey R. Ester, PhD has been promoted to the position of Senior IRB Coordinator. Dr. Ester joined CPHS in January 2012 as an IRB coordinator, and in her new role, she will continue to serve as the coordinator for IRB Panel #2, acting as a liaison between the CPHS committee and investigators to facilitate study review and approval. Dr. Ester received her Bachelors in Genetics from Texas A&M in 2004 and her PhD in Human and Molecular Genetics from UTHealth in 2010. Dr. Ester’s graduate work focused on identifying genetic variants associated with clubfoot. She also completed a clinical post-doctoral fellowship at Baylor College of Medicine’s Medical Genetics Lab, where she worked on high throughput cytogenetic analysis. Congratulations, Audrey! We wish you all the best in your new role.

Let’s Welcome Glenn Winnier to MHHS!

We are pleased to announce that Glenn E. Winnier, PhD has joined Memorial Hermann as the Director of Clinical Research, taking on the role formerly held by Susmitha Gadde, MBBS, MBA, CCRP. Dr. Winnier received his Bachelor of Science in Biology and Anthropology from Emory University, and he went on to earn his PhD in Cell Biology from Vanderbilt University. He comes well qualified to his current position, as he has directed clinical research in various settings over the past decade. Previously, Dr. Winnier served as the Director of Strategic Research and cGMP Manufacturing at The Methodist Hospital Research Institute (MHRI), as well as the Project Director for the Department of Diabetes at MHRI. Prior to that, he acted as the Director of Stem Cell Research and then the Director of Cell Therapics at Opexa Therapeutics, Inc. He additionally has extensive experience as a basic science researcher. Welcome, Glenn! We look forward to working with you.

Updated Harris Health System Research Fee Schedule

Harris Health System has issued an updated fee schedule for services provided for research protocols, and the new fees are effective for financial agreements created after April 25, 2016. This new schedule has been posted in IRIS under “IRB Coordinator Tools.” Please contact Sara Ruppelt at 713-566-6225 with any questions.
Upcoming Training

iRIS Training
**Objective:** Provide hands-on training in the iRIS system, which is used to submit research protocols to UTHealth’s CPHS and AWC.
**Date:** May 17, 2016
**Time:** 9:30 am – 12:00 pm
**Location:** UCT 1155 (Parking will be validated)
Registration is required. Register [here](#).

Clinical Research Budgeting and Billing Training
**Objective:** A hands-on workshop that will cover the processes for billing, coverage analysis, building a research budget, and reconciliation.
**Date:** June 28, 2016
**Time:** 1:00 pm – 4:00 pm
**Location:** MSB B.500
Registration is required. Register [here](#).

Clinical Research Finance Lunch and Learn
**Objective:** Provide staff members guidance on research financial topics (e.g., budgeting, billing, and coverage analysis). Also, a forum to introduce or update financial matters and to present questions or concerns for discussion in an open setting with peers.
**Date:** May 11, 2016
**Time:** 11:30 am – 12:30pm
**Location:** MSB 2.135
*Feel free to bring your lunch.*
Registration is not required.

Study Coordinator Monthly Forum
**Objective:** Discuss best practices in clinical research management and network with administrators and staff from various research groups within UTHealth.
**Date:** May 24, 2016 (Major Extremity Trauma Research Consortium (METRC))
**Time:** 11:30 am – 1:00 pm
**Location:** MSB 2.135
*Lunch provided for the first 40 participants.*
Registration is not required.

Orientation for Clinical Research Staff
**Objective:** Educate new clinical research personnel on clinical trial management, as well as IRB review and Memorial Hermann study start up processes. The program will lead into the Study Coordinator Forum.
**Date:** June 28, 2016
**Time:** 9:00 am – 11:30 pm
**Location:** MSB G.100
Registration is required. Register [here](#).

Clinical Research Finance Lunch and Learn
**Objective:** Provide staff members guidance on research financial topics (e.g., budgeting, billing, and coverage analysis). Also, a forum to introduce or update financial matters and to present questions or concerns for discussion in an open setting with peers.
**Date:** May 11, 2016
**Time:** 11:30 am – 12:30pm
**Location:** MSB 2.135
*Feel free to bring your lunch.*
Registration is not required.

About the Clinical Trials Resource Center
It is the mission of the Clinical Trials Resource Center (CTRC) to provide a single portal of expertise and best practices for study teams in order to facilitate efficient, compliant, and ethical study conduct and management. The CTRC office is located at UCT 790. Please visit [https://www.uth.edu/ctrc/](https://www.uth.edu/ctrc/) for more information.

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