

Overview

The PCS Portal provides quick access to Patient Profiles and allows fast and easy submissions for travel requests, stipend, or reimbursement payments. The portal also helps retain important information such as the patient's travel preferences.

To access the PCS Portal, use this link: <https://pcs.medpace.com>.

- If you would like to bookmark the portal URL, wait until after you are able to login and then bookmark the Dashboard page.

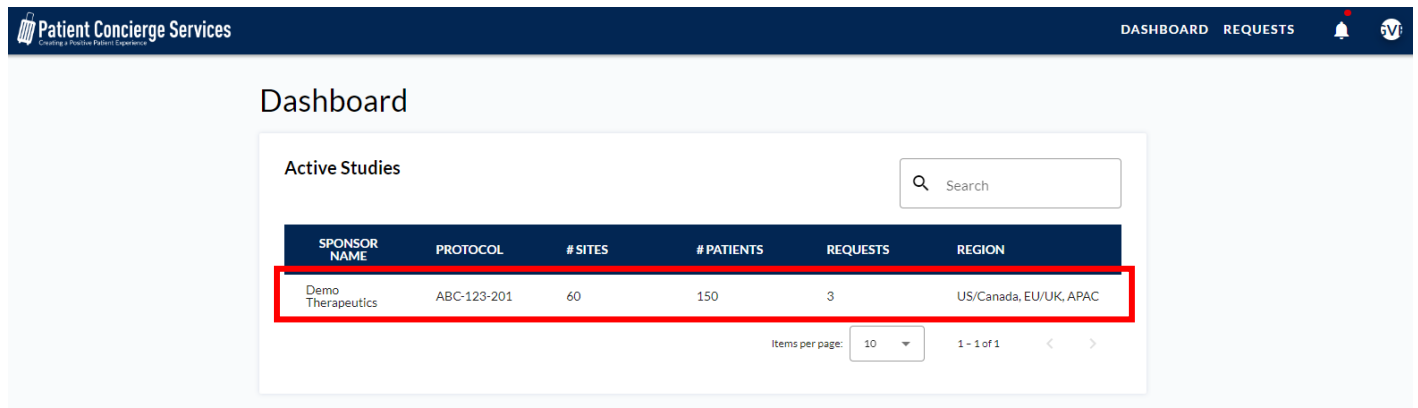
Login

Your login username will always be your email address. For your initial login, you will automatically receive a temporary password from PCS (pcs@medpace.com) once your account is created. After logging in with your temporary password, you will be prompted to create a new, permanent password. If you encounter an error during the initial log in process, please follow these steps:

- Try the login process in another browser.
 - Google Chrome and Firefox work best.
- Switch the browser to incognito mode.
- Refresh the page and try logging in again.
 - The problem typically resolves after 2 or 3 attempts.

Dashboard and Study Overview

The Dashboard shows all active studies that are currently assigned to you. From the Dashboard, you can access the Study Overview page by clicking the ribbon or name of the study.



The screenshot shows the PCS Portal Dashboard. At the top is a dark blue header with the Patient Concierge Services logo on the left and navigation links for DASHBOARD, REQUESTS, a notification bell, and a user profile icon on the right. Below the header, the main content area is titled "Dashboard". Under this title is a section for "Active Studies". It features a search bar on the right. Below the search bar is a table with the following columns: SPONSOR NAME, PROTOCOL, # SITES, # PATIENTS, REQUESTS, and REGION. A single row of data is visible, highlighted with a red border: Demo Therapeutics, ABC-123-201, 60, 150, 3, and US/Canada, EU/UK, APAC. At the bottom right of the table, there is a pagination control showing "Items per page: 10" and "1 - 1 of 1" with navigation arrows.

SPONSOR NAME	PROTOCOL	# SITES	# PATIENTS	REQUESTS	REGION
Demo Therapeutics	ABC-123-201	60	150	3	US/Canada, EU/UK, APAC

On the Study Overview page, you will see the details regarding the study, including the Sponsor name, Protocol ID, and Study Code. Below this information is a list of all patients assigned to your site. You will also be able to add patients from this page.

Study Overview

ADD PATIENT

DEMO

SPONSOR
Demo Therapeutics

PROTOCOL
ABC-123-201

STUDY #
ABC201

Patients

Search

PATIENT ID	FIRST NAME	LAST NAME	LAST VISIT DATE	ACTION
007-001	Princess	Fiona	12/15/2022	⋮

Adding Patients

From the Study Overview page, select the “Add Patient” button located in the top right. A new page will load with text boxes for you to fill in information. First, ensure the patient has read and signed the ICF before checking the box in the Consent Form section. Next, enter in the personal information regarding the patient and if needed, create a caregiver profile. Up to two caregivers can be added per patient.

Travel & Payment Selections

In the Travel Information section, select “Yes” if a form of travel is expected for the patient for future visits and additional text boxes will appear requesting additional information needed for booking travel. If travel needs are not relevant to the patient, select “No” for each form of travel. These fields are not required, but are helpful.

The next selections are related to Payments. Select the payment recipient (if applicable), the preferred payment method, and the preferred currency in the Payment Method Options section. If the patient is a minor, a caregiver profile must be created and selected as the payment recipient.

KYC Details – Know Your Customer

The KYC Details section allows you to securely upload required tax or government documents (if needed) for PCS Team to issue payments to the payment recipient. **All documents uploaded to KYC Details must be as a single PDF file.**

Once a document has been uploaded, PCS Team will review. If correctly completed, PCS Team will mark the payment recipient as “Ready for Payment.” PCS Team cannot issue any payments until “Ready for Payment,” has been checked. If a wrong file was accidentally uploaded, click the upload document button again and the system will replace the first file with the second upload. Two separate files cannot be uploaded.

Additional Information

Located at the bottom of the page is the Additional Information section. Select any of the applicable accessibility requirements needed for the patient. If there is anything else that should be noted but has not been listed above, select the “Other” checkbox and a free form text box will appear.

Once all the information has been reviewed and completed, select the “Create Patient” button.

Edit Profiles

Patient and caregiver profiles can be updated at any time. To update, go to the patient profile and select the “Edit” button located in the top of each section of information. Once you have updated the information, select “Save”, which replaces the “Edit” button, and click the “Update Patient” button located at the top right or bottom right of the page. To edit a caregiver profile, while within the patient profile, select “View Profile” below the relevant caregiver. Click the “Edit” button located in the top right and when finished, click “Save” at the bottom right.

Submitting Travel Requests

Travel requests are to be submitted when PCS Team needs to pre-book and pre-pay travel arrangements on behalf of the patient. To enter a travel request, go to the Study Overview page, find the patient you would like to submit a travel request for, and click on the three dots to the right of their name and select “New Travel Request”. In the Travel Information section, you can select between multiple forms of travel and the entered information will save. Fill out the travel request page and add the information that is needed for the PCS team to successfully complete a travel request.

If a caregiver is traveling with a patient, select the appropriate caregiver. If a caregiver profile has not been created yet, you can create a caregiver profile within the travel request and then select which caregiver(s) will be traveling.

Payment Requests

Payment requests are to be submitted to request reimbursement after a completed visit for eligible out-of-pocket travel costs incurred by the patient. Payment requests can also be used to request a stipend payment if PCS is supporting stipend payments.. To enter a payment request, go to the Study Overview page, find the patient that you would like to submit a payment request for, and click on the three dots to the right of their name and select “New Payment Request”. Fill out the Visit Details section and in the Payment Request Type, select “Out of Pocket Reimbursement” or “Stipend”, if applicable.

Multiple expenses can be added to a reimbursement request at once for the same visit. To add additional reimbursements, click the “Add Expense” button and a new section will appear. Fill out the relevant information needed. Confirm the currency listed is correct, only one currency can be issued per reimbursement request.

Please note that you must upload supporting documents/receipts for reimbursements. Only .pdf or .jpg files can be uploaded as the supporting documents for reimbursement requests.

If the wrong file was accidentally uploaded, click the upload document button again and the system will replace the first file with the second upload. You cannot upload two different files for one expense.

PCS Review/Viewing Requests

The PCS team will review all requests to ensure they are within scope of the Travel and Reimbursement Policy. All requests will hold a certain status. The different statuses and their respective meanings are listed below:

- **Submitted** – Request received within portal and is awaiting PCS Team review.
- **In Process** – PCS Team is currently working on request
- **Pending Approval** – Submitted request is not within scope of policy and requires additional review/sponsor approval. PCS Team is working to obtain needed approval.
- **Pending Set-Up** – PCS Team is working on the request and setting up patient in payment system.
- **Site Review** – Request is pending Site Coordinator or PCS Team to verify visit details before completing.

- **Denied** – Request is not within scope of policy and/or was not approved by sponsor.
- **Cancelled** – Request cancelled by PCS Team due to associated visit being cancelled, request made in error, patient no longer needs services, etc.
- **Completed** – Request finalized by PCS Team.

To view the status of your request, go to the Patient Overview page which contains a listing of all requests for the patient and their current status. Each request has a saved status history and additional notes may be made by the PCS team regarding a request's status change. To view the status history, select the request and click the three dots in the top right corner of the request and click "View History".

Duplicate Prevention

The Portal will recognize if newly submitted requests are at risk of being a duplicate of a request already submitted. After clicking, "Submit" a message will pop-up and ask if you are sure you want to submit a duplicate request before continuing. These requests will also be flagged on the PCS team's side for further review.

Questions

If you have any questions or issues regarding the portal, please reach out to the PCS team at pcs@medpace.com.