PCS PORTAL

SITE TRAINING

V4 | LAST MODIFIED 24-MAY-2024

MED PACE

TABLE OF CONTENTS

MAKING THE COMPLEX SEAMLESS

MEDPACE

INTRODUCTION TO PCS PORTAL

- A secure online site-facing portal for submitting & tracking travel and payment requests.

- Retains important information, such as travel preferences, in Patient Profiles.

- Provides view of past and current requests and statuses.
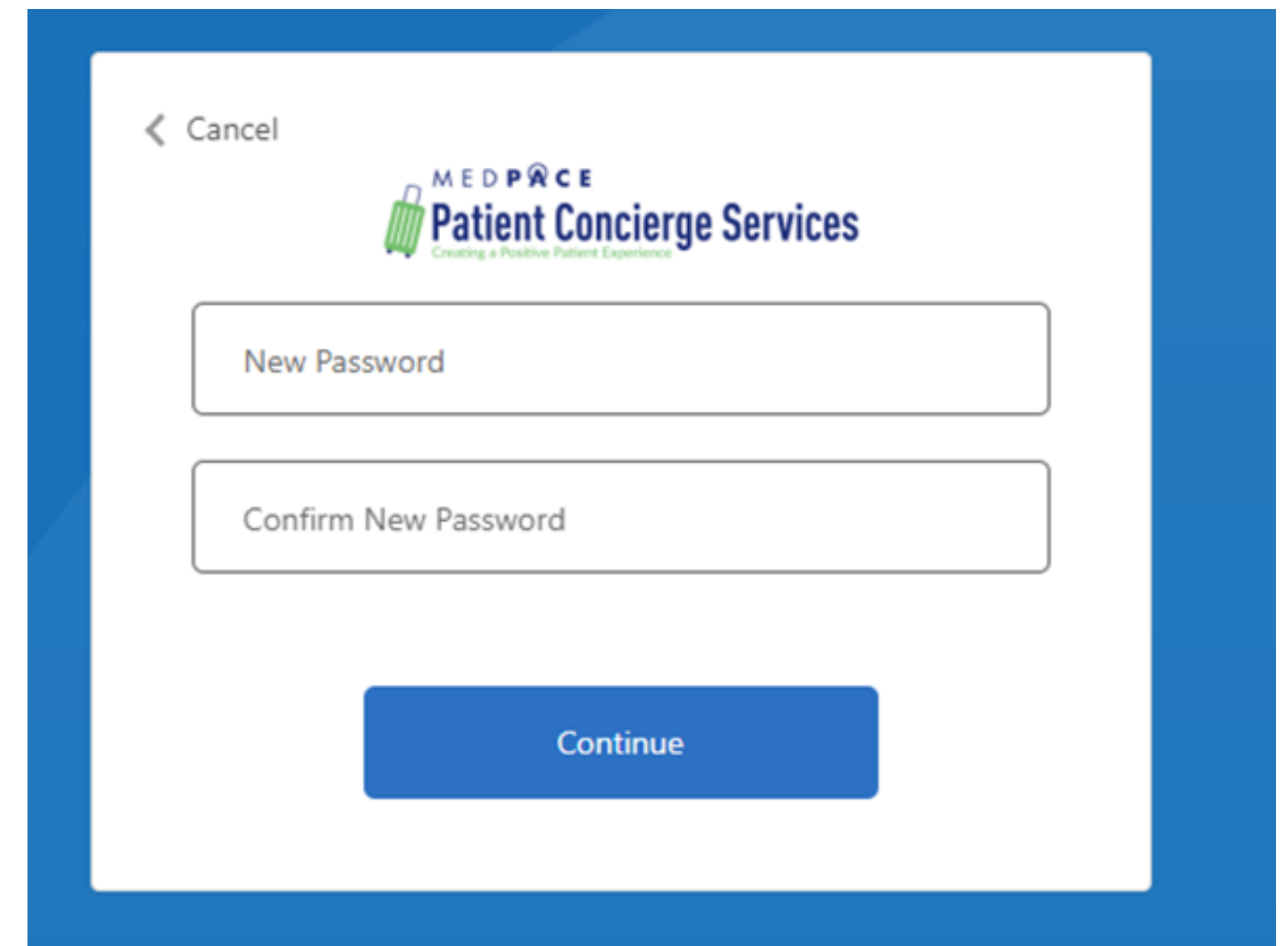
MED**PACE**

INITIAL LOGIN

- https://pcs.medpace.com

- Username is your email

- Your temporary password will be sent to you automatically from pcs@medpace.com
  - If you do not receive an email, be sure to check your spam folder.
  - Note: password is case sensitive

- Enter your username and temporary password and click "Sign in"

INITIAL LOGIN

- You will now be prompted to create a new, permanent password.

- Once you click "Continue", you will be logged into the portal.
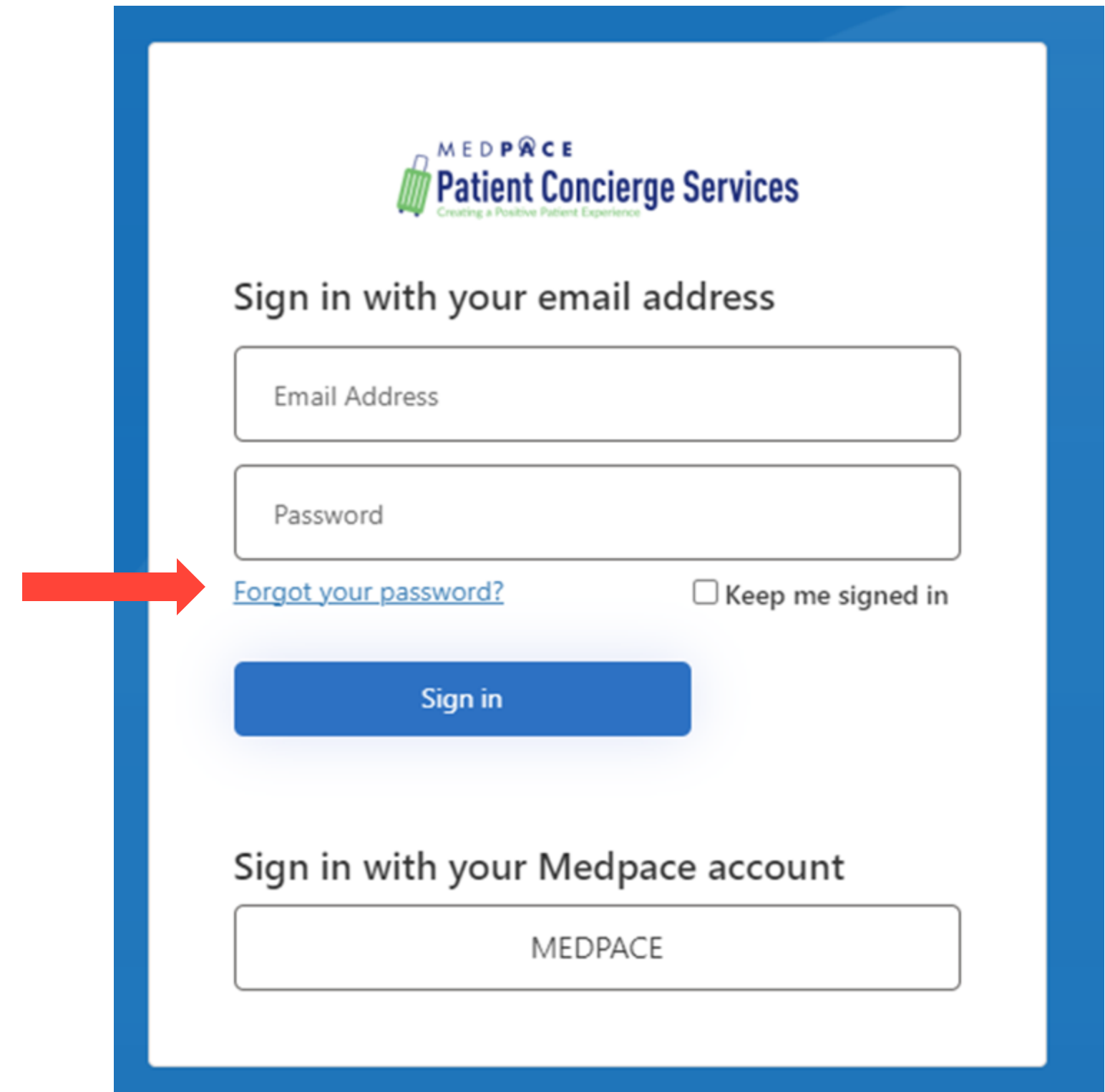
MEDPACE

INITIAL LOGIN - TROUBLESHOOTING

- 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.

MEDPACE
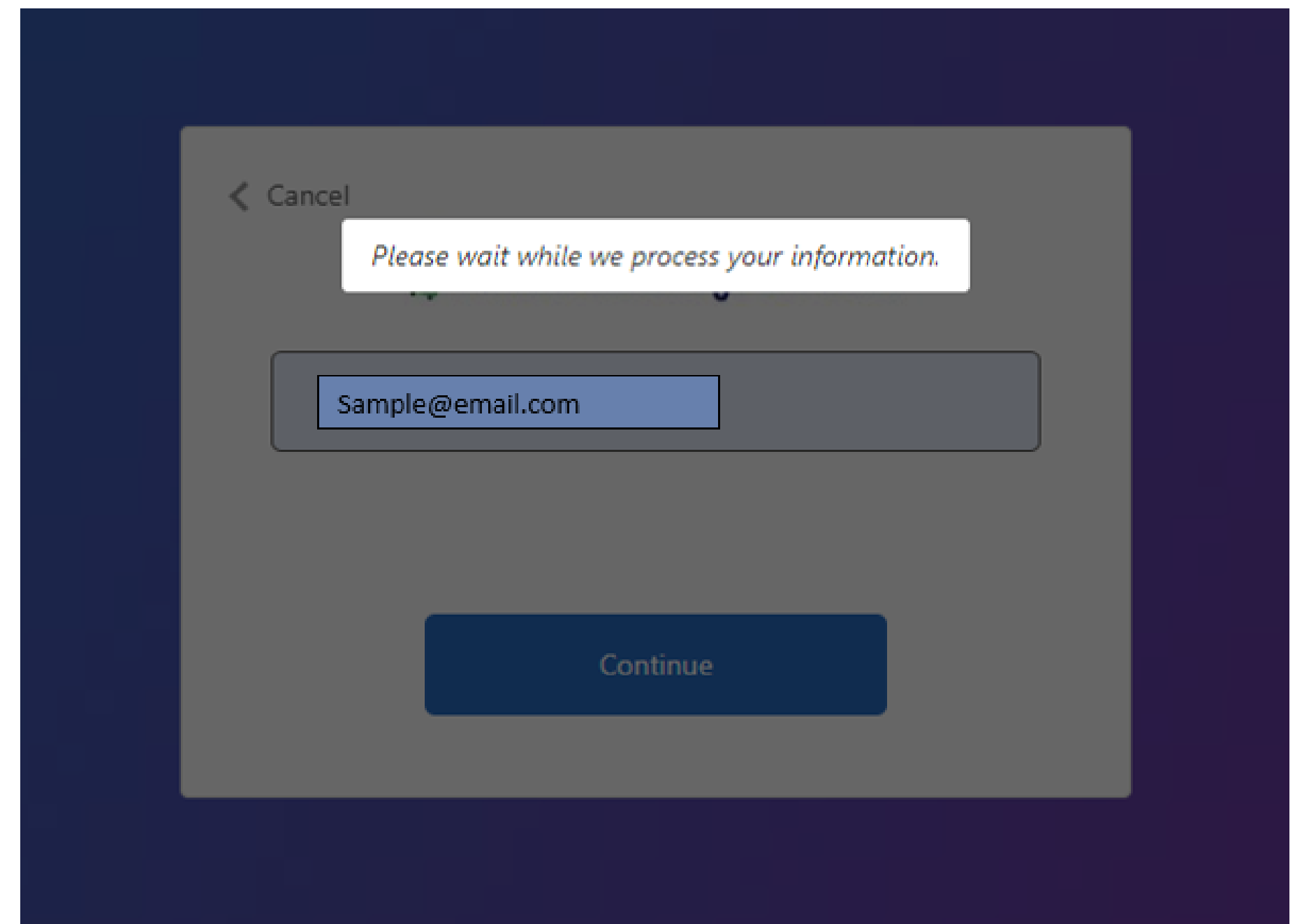
FORGOT PASSWORD

- If you have forgotten your password, it can be reset using the "Forgot your password?" link. Follow the requested steps to verify your account and create a new password.

- Passwords can also be reset manually by the PCS team, and you will receive a new temporary password.

MEDPACE

DASHBOARD

- After logging in, the Dashboard will be your home screen. Here, you will be able to see the study you are assigned. By clicking on the study, the page will load to Study Overview.

STUDY OVERVIEW

- You will see all patients that you have added to the study on this page as well as the option to add additional patients.

ADDING PATIENTS

ADD PATIENT

- Select the "Add Patient" button on the study overview page

MEDPACE

PERSONAL INFORMATION

- After the patient has read and signed the ICF, click the checkbox in the "Consent Form" section.

- Add all relevant information for the patient.

- **Please be sure to double check for information accuracy!**
  - It is very important patient names, date of births, and addresses are complete, spelled correctly, and contain all relevant information such as correct zip code and apartment number(s). Incorrect data can delay patients receiving their reimbursement(s).

Consent Form *

☐ By checking this box I confirm the patient has signed the informed consent form for this study

This field is required

Personal Information

Patient ID *
001-009

First/Given Name *
Katie

Middle Name
Marie

Last/Surname *
Jones

Phone Number *
513-555-5555

Email Address *
katie.jones@email.com

Preferred Language *
English

MEDPACE

CAREGIVER INFORMATION

- Create caregiver(s) for patients.

- Allows designation of "primary" and "secondary" caregivers.

- Caregiver profile can also be created within travel requests and will be saved to patient profile.

TRAVEL INFORMATION

- If travel is required, select "Yes" under each form of travel; additional fields will appear to complete.
  - Travel fields will default to "No"

- Move between travel tabs and the portal will remember your selections and entries.

- These fields are not required, but are helpful.

MEDPACE

PAYMENT INFORMATION

- For anticipated payments, select the payment recipient, payment method, and the preferred currency.
  - If patient is a minor, a caregiver profile must be created and then selected as the payment recipient.
  - A Payment Recipient is not required for profile creation and can be updated in the future.

MEDPACE

KYC DETAILS – IF APPLICABLE

- KYC Details allows a secure upload of any tax or government documents needed for payments to be issued to the payment recipient.

- PCS Team will make individual sites aware if a KYC document is needed for upload.

- **The document(s) must be a single PDF file.**

- After the patient profile has been created, PCS Team will review the document(s), and if correctly completed, PCS will mark the payment recipient as "Ready for Payment."

- PCS Team cannot issue any payments to the patient until "Ready for Payment" has been checked.

- If a wrong file has been 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.

KYC Details (Know Your Customer)

In order to process payment, patient documentation should be uploaded here if requested by PCS.

Please upload files only in *.pdf , *.jpg , *.jpeg , *.png formats.

UPLOAD DOCUMENT

KYC Details (Know Your Customer)   EDIT

In order to process payment, patient documentation should be uploaded here if requested by PCS.

☑ Ready For Payment

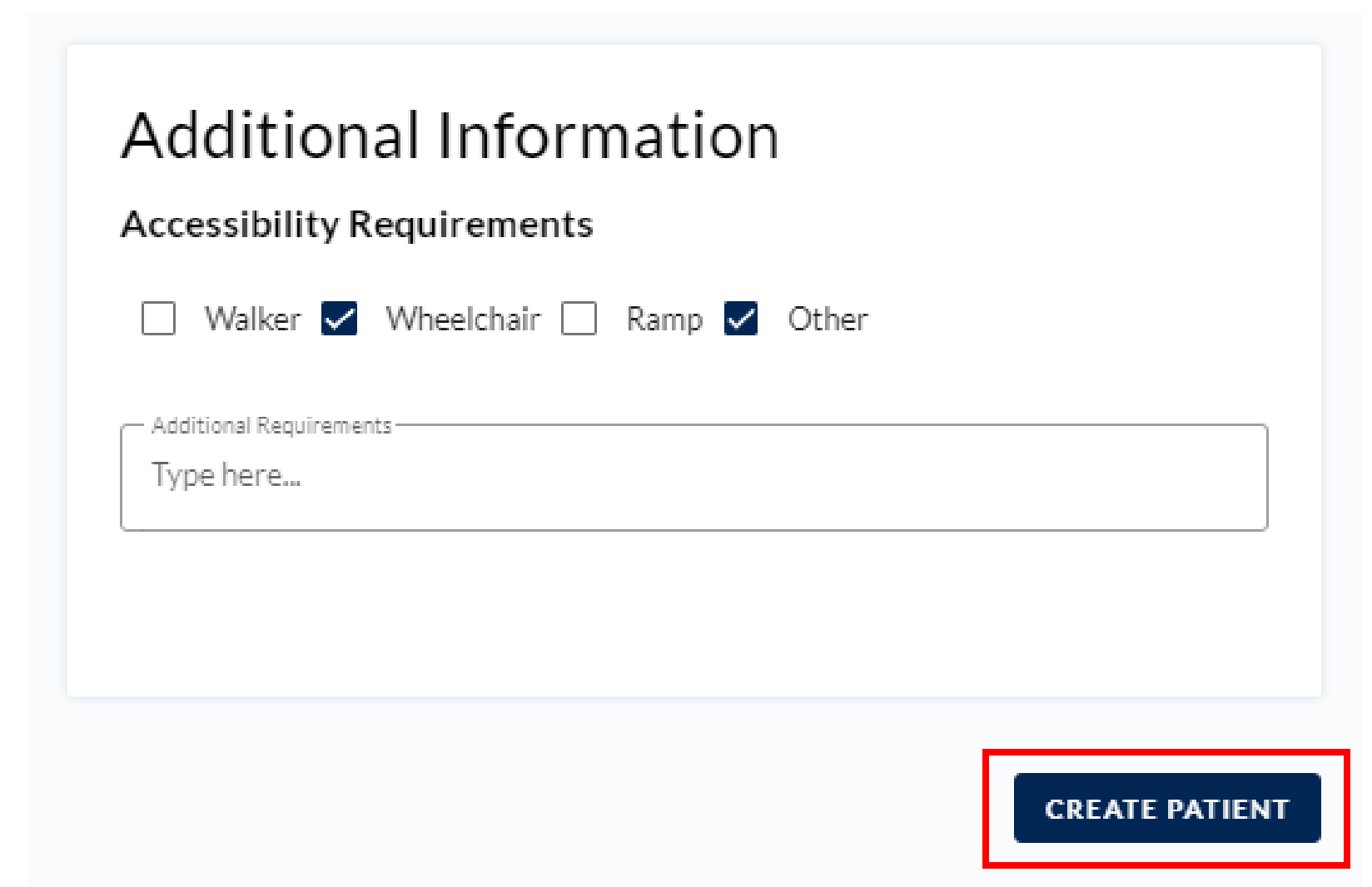Approved by   PCS Admin   on 05-26-2021

MED**PACE**

ADDITIONAL INFORMATION

- Select any of the accessibility requirement checkboxes relevant to the patient.

- If "Other" is selected, a text box will appear for additional notes to be added.

- Once the information is filled out, select the "Create Patient" button. The page will re-load to your site dashboard.

MEDPACE

VIEW/UPDATE PATIENT PROFILE

VIEW PATIENT OVERVIEW

- To view or access the patient's overview, find the patient from your Study Overview page and click the three dots to the right of their name.

- A dropdown menu will appear; select "Patient Overview".

MEDPACE

PATIENT OVERVIEW

- On the Patient Overview page, all travel and payment requests for the patient will be displayed.

- All requests that have been saved/submitted will have a status.

- To access or edit the patient's information, click the "Patient Profile" button.

UPDATE PATIENT PROFILE

- Updates to the patient's information should be done only when necessary.

- Each section of information has an "Edit" button in the top right. Once you click "Edit", the fields will become editable.

  – Once finished, click "Save" and then select the "Update Patient" button located at the top or bottom of the page.

Personal Information   EDIT

PATIENT ID
001-010

FIRST/GIVEN NAME (as listed on Government ID)
Katie

LAST/SURNAME (as listed on Government ID)
Jones

PHONE NUMBER
513-555-5555

Personal Information   SAVE

Patient ID *
001-010

First/Given Name *
Katie

Middle Name
Type here...

Last/Surname *
Jones

Phone Number *
513-555-5555

UPDATE PATIENT

MEDPACE

TRAVEL REQUESTS

TRAVEL REQUEST

- Travel requests are to be submitted when PCS Team needs to book and pre-pay for travel accommodations on behalf of a patient.

- On your Study Overview page, find the patient you want to request travel for and click the three dots to the right of their name.

- A dropdown menu will appear; select "New Travel Request".

MAKING THE COMPLEX SEAMLESS

MEDPACE

TRAVEL REQUEST

- Fill out Visit Details and Travel Information needed for the PCS team to successfully book travel.
  - A caregiver can be added on this page if they are attending the visit and have not been created already.

- Under the "Visit Details" section, add any navigational instructions to aid the patient/caregiver/transportation provider in finding the site.

- Click "Submit" at the bottom of the page
  - You may save a draft and come back to this page at a later time
  - PCS Team will receive a notification once the request has been submitted

MEDPACE

PAYMENT REQUESTS

PAYMENT REQUEST

- Payment requests are to be submitted to request reimbursement after a completed visit for eligible out-of-pocket travel costs incurred by the patient.

- On your Study Overview page, find the patient you want to request stipend payments for and click the three dots to the right of their name.

- A dropdown menu will appear; select "New Payment Request". This will create a blank Payment Request for you to fill out.

MEDPACE
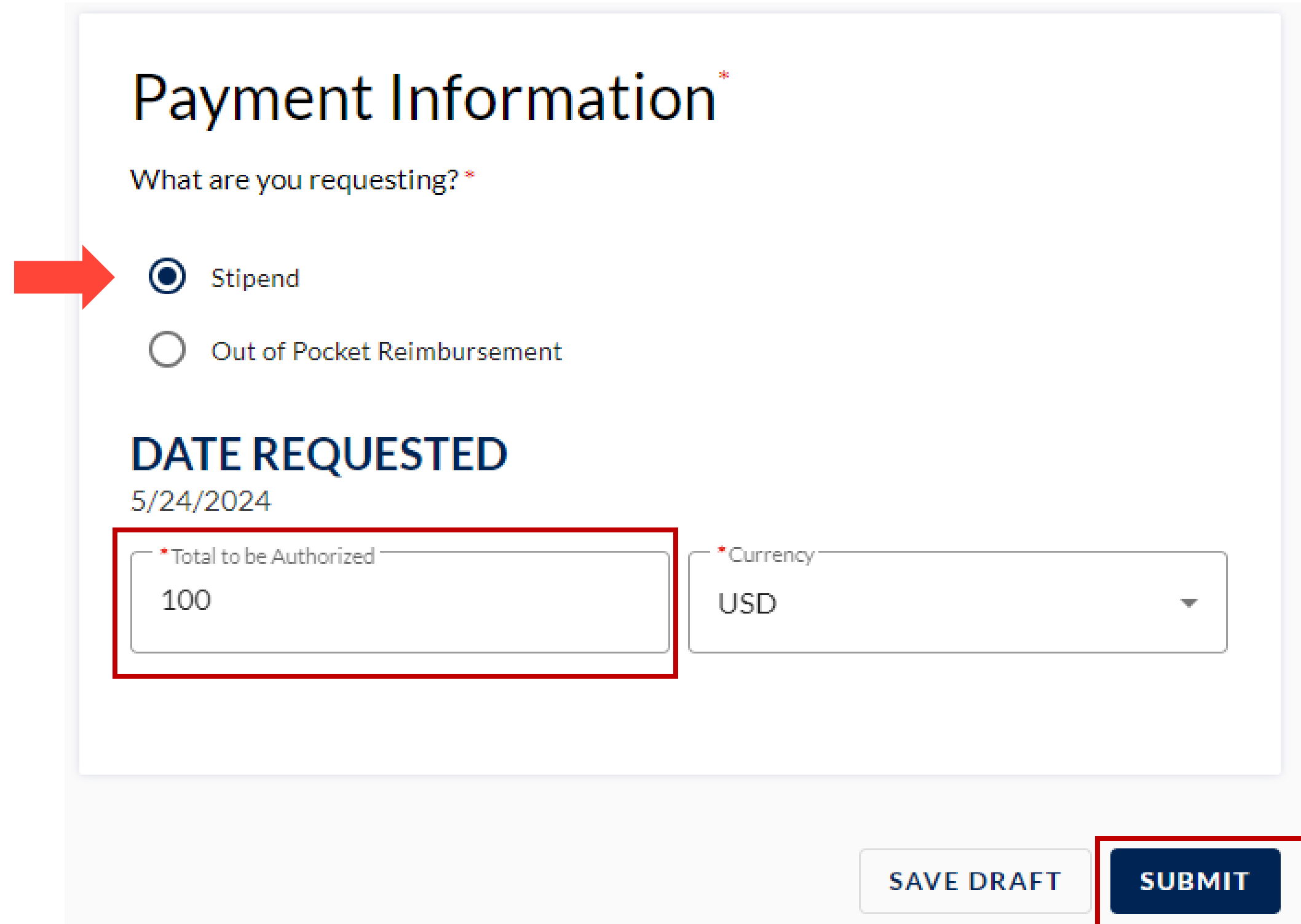
STIPEND REQUEST – IF APPLICABLE

- Stipend requests are to be submitted if PCS is supporting stipend payments on your study **and** your site is responsible for entering them into the portal.

- Under the Payment Request Type, select "Stipend".

- Enter the stipend amount into the "Total to be Authorized" box.

- Select the "Submit" button once finished.

Payment Information*

What are you requesting? *

- ● Stipend
- ○ Out of Pocket Reimbursement

DATE REQUESTED
5/24/2024

*Total to be Authorized
100

*Currency
USD

SAVE DRAFT   **SUBMIT**

REIMBURSEMENT

- If you are requesting an out-of-pocket reimbursement for a patient, select "Out of Pocket Reimbursement"

MEDPACE

EXPENSE TYPE AND RECEIPT

- Once "Out of Pocket Reimbursement" is selected, a new section will appear to add the expense and associated receipt.

- Select the applicable expense from the drop-down list

- Upload a copy of the corresponding receipt (<u>MUST</u> be .pdf or .jpg file). Please note that you **must** upload supporting documents/receipts for expenses to be eligible for reimbursement.

MED**PACE**

ADD EXPENSES

- Multiple expenses can be added to a reimbursement request at once for the same visit. To add multiple expenses to a single reimbursement request, click the "Add Expense" button and uploading each receipt.

- Ensure the transaction date and amount match the receipt.

- To remove a receipt, click the Trash icon.

- The "Total to be Authorized" field will automatically calculate the total based on the reimbursement amounts entered.

- Select the "Submit" button once finished.

ADD EXPENSES CONT.

- After you click "Submit", a box will pop up where you can input any additional details about the visit the PCS team may need to be aware of.

- Click "Confirm" to submit the request.

VIEW REQUESTS

VIEW REQUESTS

- To view the requests for an individual patient, select that patient from your Study Overview page, then select "Patient Overview" from the dropdown.

- Requests will be listed by visit and include the date, request status, and request type. To see additional information, click on the specific request.

MED**PACE**

VIEW ALL REQUESTS

- To see all the requests you have submitted, select the "Requests" tab located at the top right of the page.

- Clicking on the bell icon will show you how many submitted requests you have.

MED**PACE**
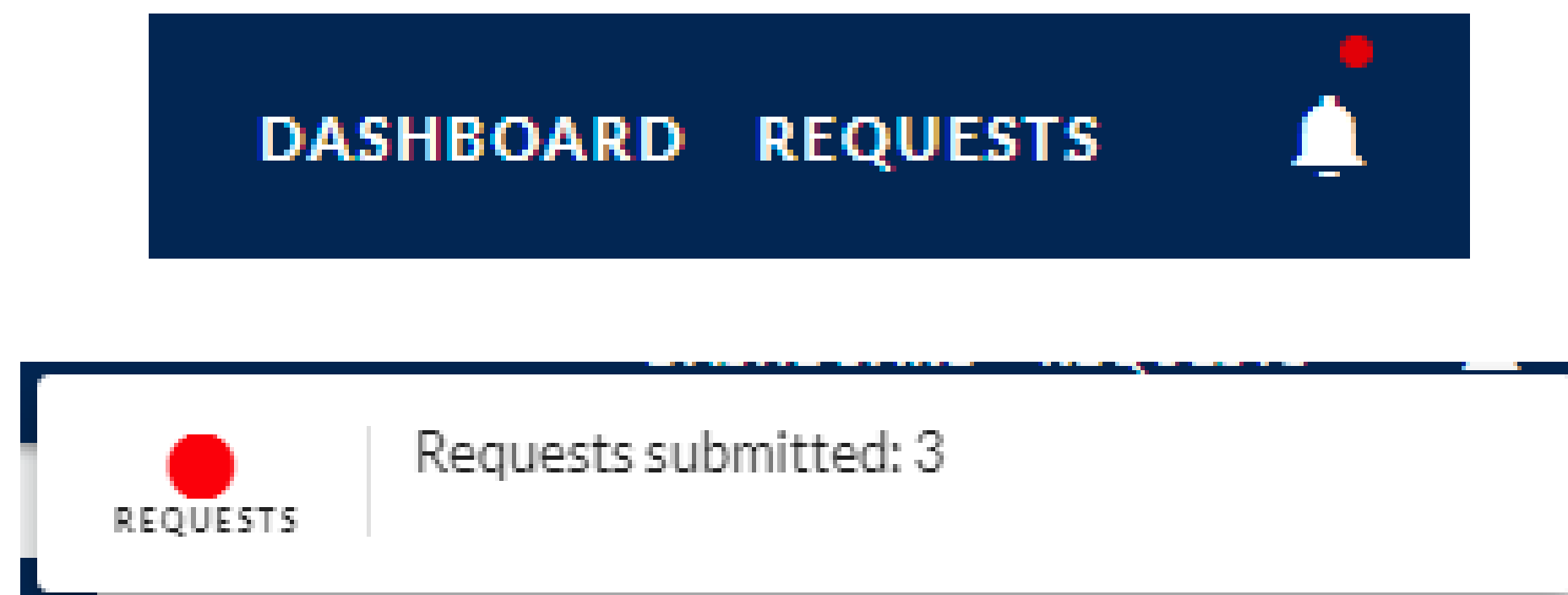
VIEW ALL REQUESTS

- To see additional information, click on the specific request.

MAKING THE COMPLEX SEAMLESS

MEDPACE

STATUS MEANINGS

- **<u>Submitted</u>** – Request received within portal and is awaiting PCS Team review.

- **<u>In Process</u>** – PCS Team is currently working on request.

- **<u>Pending Approval</u>** – Submitted request is not within scope of policy and requires additional review/Sponsor approval. PCS Team is working to obtain needed approval.

- **<u>Pending Set-Up</u>** – PCS Team is working on the request and setting up patient in payment system.

- **<u>Site Review</u>** – Request is pending Site Coordinator or PCS Team to verify visit details before completing.

- **<u>Denied</u>** – Request is not within scope of policy and/or was not approved by Sponsor.

- **<u>Cancelled</u>** – Request cancelled by PCS Team due to associated visit being cancelled, request made in error, patient no longer needs services, etc.

- **<u>Completed</u>** – Request finalized by PCS Team.

MED**PACE**

VIEW HISTORY

- History of each request is displayed on the left-hand side of the screen.

- The history will be updated each time a request's status is changed, and any notes submitted will display as well.

Request History

5/21/24 at 03:14 pm
Submitted with note "Visit is for C1D1" by Grace Vonder Brink

MEDPACE

DUPLICATE REQUESTS

- If the Visit Type, Visit Date, and Request Type match a previous request, the Portal will flag this as a duplicate and a warning will appear.

Potential Duplicate

A request with the same information already exists for this patient. Do you still want to submit?

CONTINUE

CANCEL

- Potential duplicates will appear with a red warning box when you view them under the request screen:

PATIENT ID	PATIENT NAME	PROTOCOL	VISIT NAME	VISIT DATE	REQUEST DATE	REQUEST TYPE	STATUS	PAYMENT READY
001-034	Jane Doe	DEM-012-345	Visit 1	5/10/2021	5/21/2021	Reimbursement	In Process	No
001-034	Jane Doe	DEM-012-345	Visit 1	5/10/2021	5/24/2021	Reimbursement	Submitted	No

- The request can be submitted; however, it will be marked as a duplicate and you may be contacted by PCS to provide additional details.

MEDPACE

PCS REVIEW

- The PCS team will review all requests to ensure they meet the parameters provided by the Sponsor and complete the requests as soon as possible.

- Additional information may be needed by the PCS team and you may be contacted to provide details.

MEDPACE

IF YOU HAVE ANY QUESTIONS REGARDING THE PCS PORTAL, PLEASE REACH OUT TO THE PCS TEAM AT PCS@MEDPACE.COM.

MEDPACE

THANK YOU