



PCS PORTAL

SITE TRAINING

V4 | LAST MODIFIED 24-MAY-2024

MEDPACE

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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.



INITIAL LOGIN

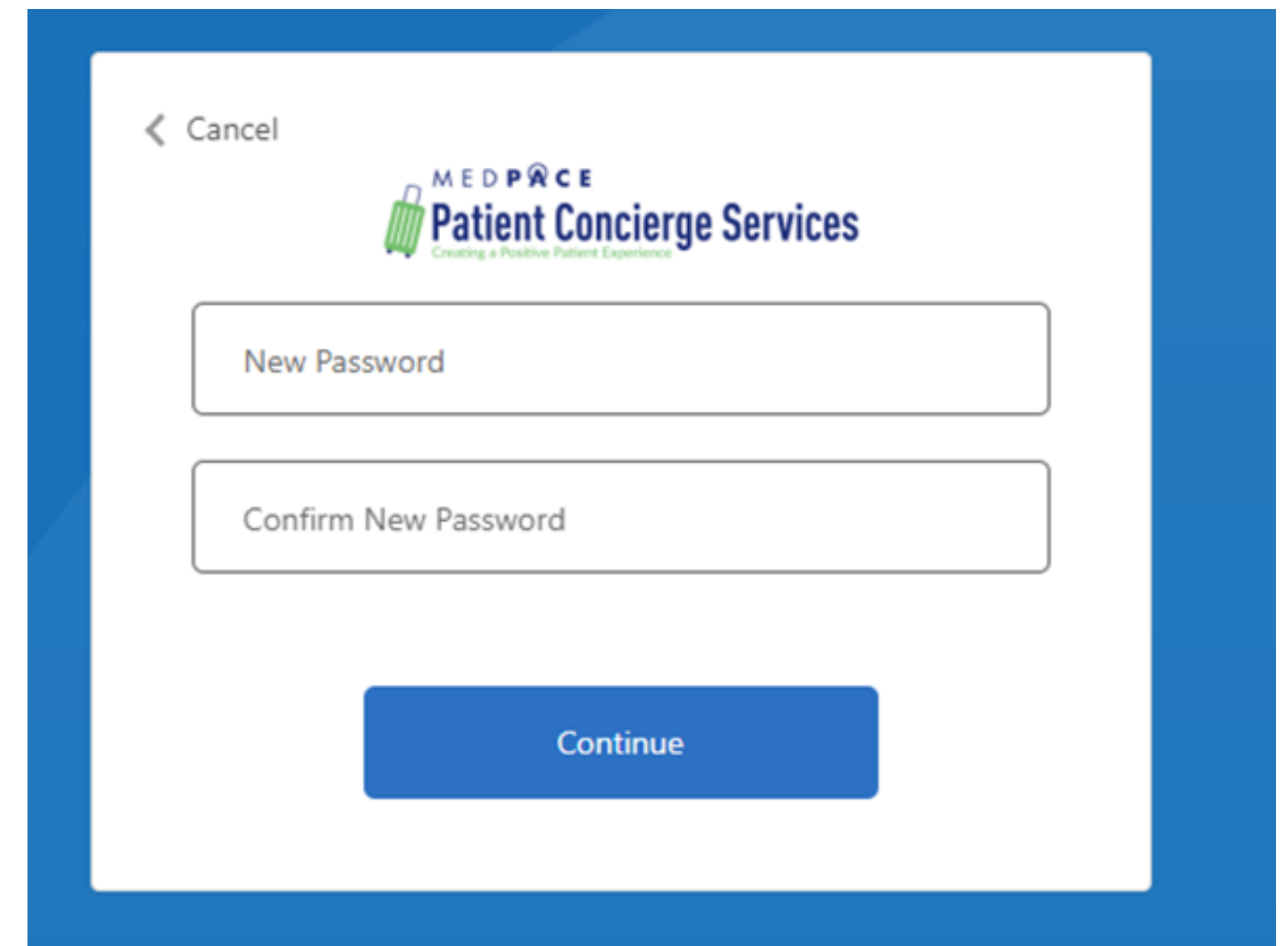
- <https://pcs.medpace.com>
- Username is your email
- Your temporary password will be sent to you automatically from pcs@medpace.com
 - If you do not receive an email, be sure to check your spam folder.
 - Note: password is case sensitive
- Enter your username and temporary password and click “Sign in”



The screenshot shows the login interface for MedPace Patient Concierge Services. At the top, the logo features a green suitcase icon next to the text "MEDPACE Patient Concierge Services" and the tagline "Creating a Positive Patient Experience". Below the logo, the instruction "Sign in with your email address" is displayed. There are two input fields: "Email Address" and "Password". Below the "Email Address" field, there is a link for "Forgot your password?" and a checkbox labeled "Keep me signed in". A blue "Sign in" button is positioned at the bottom of the form.

INITIAL LOGIN

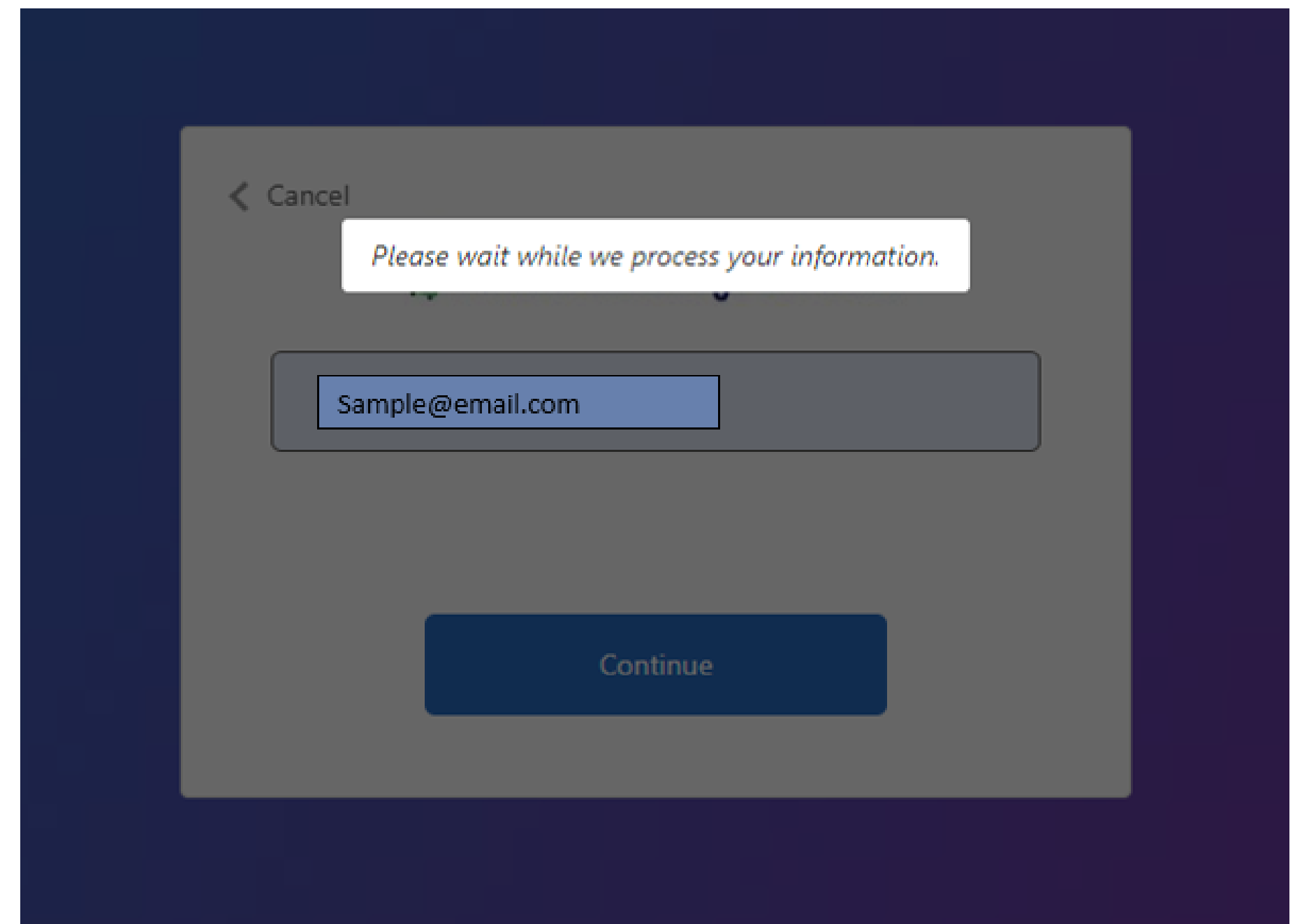
- You will now be prompted to create a new, permanent password.
- Once you click “Continue”, you will be logged into the portal.



The screenshot shows a mobile application interface for MedPace Patient Concierge Services. At the top left is a back arrow and the word "Cancel". The MedPace logo is at the top center, with the tagline "Creating a Positive Patient Experience" below it. Below the logo are two text input fields: "New Password" and "Confirm New Password". At the bottom center is a blue button labeled "Continue".

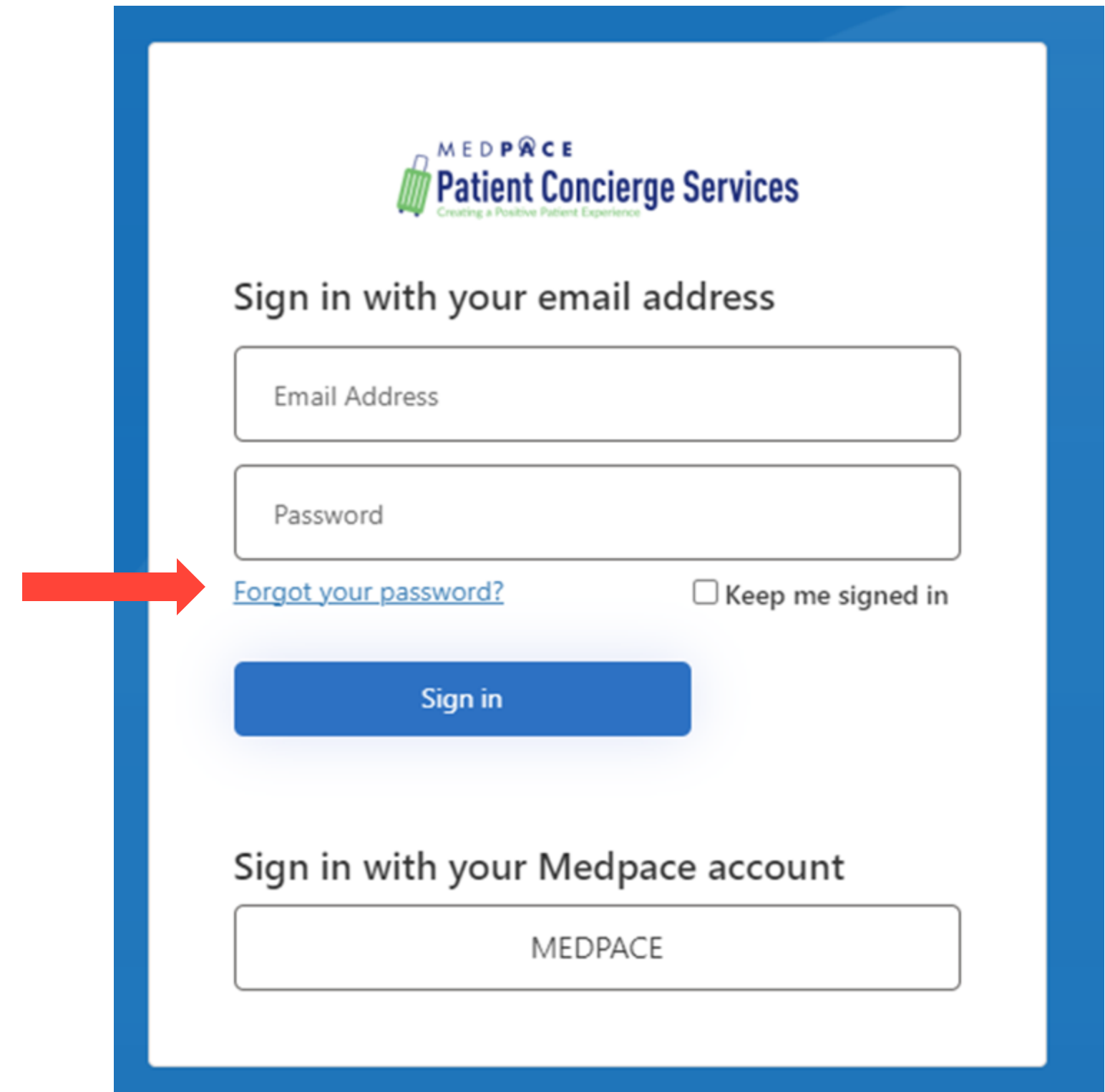
INITIAL LOGIN - TROUBLESHOOTING

- 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.



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.





The screenshot shows the Medpace Patient Concierge Services login interface. At the top is the Medpace logo and the text 'Patient Concierge Services' with the tagline 'Creating a Positive Patient Experience'. Below this is the heading 'Sign in with your email address'. There are two input fields: 'Email Address' and 'Password'. Below the 'Password' field is a blue link labeled 'Forgot your password?' which is highlighted by a red arrow. To the right of this link is a checkbox labeled 'Keep me signed in'. Below these fields is a blue 'Sign in' button. At the bottom of the form is another section titled 'Sign in with your Medpace account' with a single input field labeled '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.

Patient Concierge Services
Creating a Positive Patient Experience




DASHBOARDREQUESTS

Dashboard

Active Studies

 Search


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

Items per page: 10  1 - 1 of 1  

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.

Study Overview



SPONSOR
Demo Therapeutics

PROTOCOL
ABC-123-201

STUDY #
ABC201

ADD PATIENT

Patients

PATIENT ID	FIRST NAME	LAST NAME	LAST VISIT DATE	ACTION
007-001	Princess	Fiona	12/15/2022	⋮
005-002	Claudia	Peppers	12/5/2022	⋮




The background is a solid dark blue. On the left side, there is a vertical arrangement of light blue lines and circles. Some lines are horizontal and end in a double-lined circle. Other lines are slightly angled. There are also several solid dark blue circles of various sizes scattered across the background, particularly on the left and bottom edges. The text "ADDING PATIENTS" is centered in the middle-right portion of the image.

ADDING PATIENTS

ADD PATIENT

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

Study Overview




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	⋮
005-002	Claudia	Peppers	12/5/2022	⋮



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



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.

Caregiver Information

ADD CAREGIVER

No caregivers have been added for this patient

Add New Caregiver

☒ Make Primary?

First Name

Julie

Middle Name

Type here...

Last/Surname

Jones

Phone Number

513-444-4444

Email Address

Julie.Jones@email.com

Relationship to patient

Mother

Preferred Language

English



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.

Travel Information

< AIRLINE TRAIN INTERNATIONAL LODGING >

Will the patient need air travel?

☐ Yes

☒ No

Travel Information

< AIRLINE TRAIN INTERNATIONAL LODGING >

Will the patient need air travel?

☒ Yes

☐ No

Airline Preference #1
United

Frequent Flyer #1
123456



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.

Payment Information

Payment Recipient (Stipend or Reimbursement)

Select Recipient

N/A

Patient: Katie Jones

Primary Caregiver: Julie Jones

Payment Information

Payment Recipient (Stipend or Reimbursement)

Patient: Katie Jones

Preferred Method*

Pre-Paid Debit Card

Preferred Currency*

USD

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.

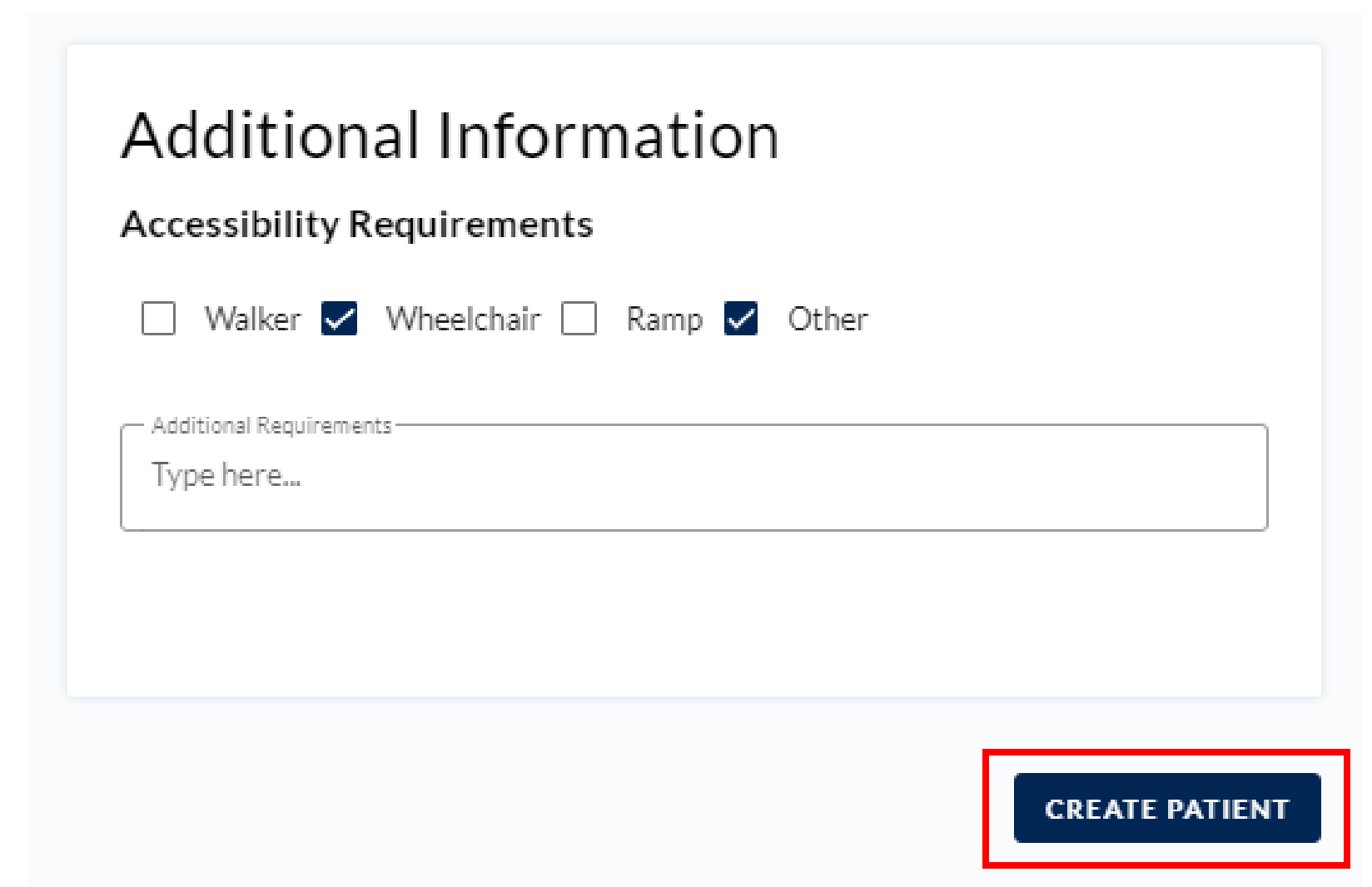
☒ Ready For Payment

Approved by PCS Admin on 05-26-2021



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.



The screenshot shows a web form titled "Additional Information". Under the heading "Accessibility Requirements", there are four checkboxes: "Walker" (unchecked), "Wheelchair" (checked), "Ramp" (unchecked), and "Other" (checked). Below these checkboxes is a text input field with the placeholder text "Type here...". At the bottom right of the form, there is a dark blue button with the text "CREATE PATIENT" in white, which is highlighted by a red rectangular border.




**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”.

Study Overview ADD PATIENT



SPONSOR
Demo Therapeutics


PROTOCOL
ABC-123-201

STUDY #
ABC201

Patients

PATIENT ID	FIRST NAME	LAST NAME	LAST VISIT DATE	ACTION
007-001	Princess	Fiona	12/15/2022	⋮
005-002	Claudia	Peppers	12/5/2022	⋮

Study Overview ADD PATIENT



SPONSOR
Demo Therapeutics

PROTOCOL
ABC-123-201

STUDY #
ABC201

Patients

PATIENT ID	FIRST NAME	LAST NAME	LAST VISIT DATE	ACTION
007-001	Princess	Fiona	12/15/2022	⋮
005-002	Claudia	Peppers	12/5/2022	⋮

Patient Overview

New Travel Request

New Payment Request

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.

						PATIENT PROFILE
PATIENT ID	PATIENT NAME	SPONSOR	PROTOCOL	SITE #		
001-010	Katie Jones	Demo Pharma	DEM-012-345	001		

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



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”.

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	⋮
005-002	Claudia	Peppers	12/5/2022	⋮

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	⋮
005-002	Claudia	Peppers	12/5/2022	⋮

Patient Overview

New Travel Request

New Payment Request

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

Patient Information

PATIENT NAME

Princess Fiona

PATIENT ID

007-001

ADD CAREGIVER

No caregivers have been added for this patient

Visit Details

SITE #
005

SITE ADDRESS
5375 Medpace Way Santa Cruz, CA 90210

Special Navigation Instructions

Visit Name*

Screening

Visit Start Date*
4/11/2023



Visit End Date*
4/11/2023



Appt. Start Time*
03:30



Appt. End Time*
05:30



Travel Information

WHICH PATIENT CAREGIVER(S) WILL BE ATTENDING THE VISIT? *

☒ No caregivers will accompany patient

FLIGHT TRAIN **LODGING** GROUND OTHER

Will the patient need lodging?

☒ Yes

☐ No

Special Requests

SAVE DRAFT

SUBMIT





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.

Study Overview ADD PATIENT

DEMO SPONSOR Demo Therapeutics PROTOCOL ABC-123-201 STUDY # ABC201

Patients

PATIENT ID	FIRST NAME	LAST NAME	LAST VISIT DATE	ACTION
007-001	Princess	Fiona	12/15/2022	⋮
005-002	Claudia	Peppers	12/5/2022	⋮

Study Overview ADD PATIENT

DEMO SPONSOR Demo Therapeutics PROTOCOL ABC-123-201 STUDY # ABC201

Patients

PATIENT ID	FIRST NAME	LAST NAME	LAST VISIT DATE	ACTION
007-001	Princess	Fiona	12/15/2022	⋮
005-002	Claudia	Peppers	12/5/2022	⋮

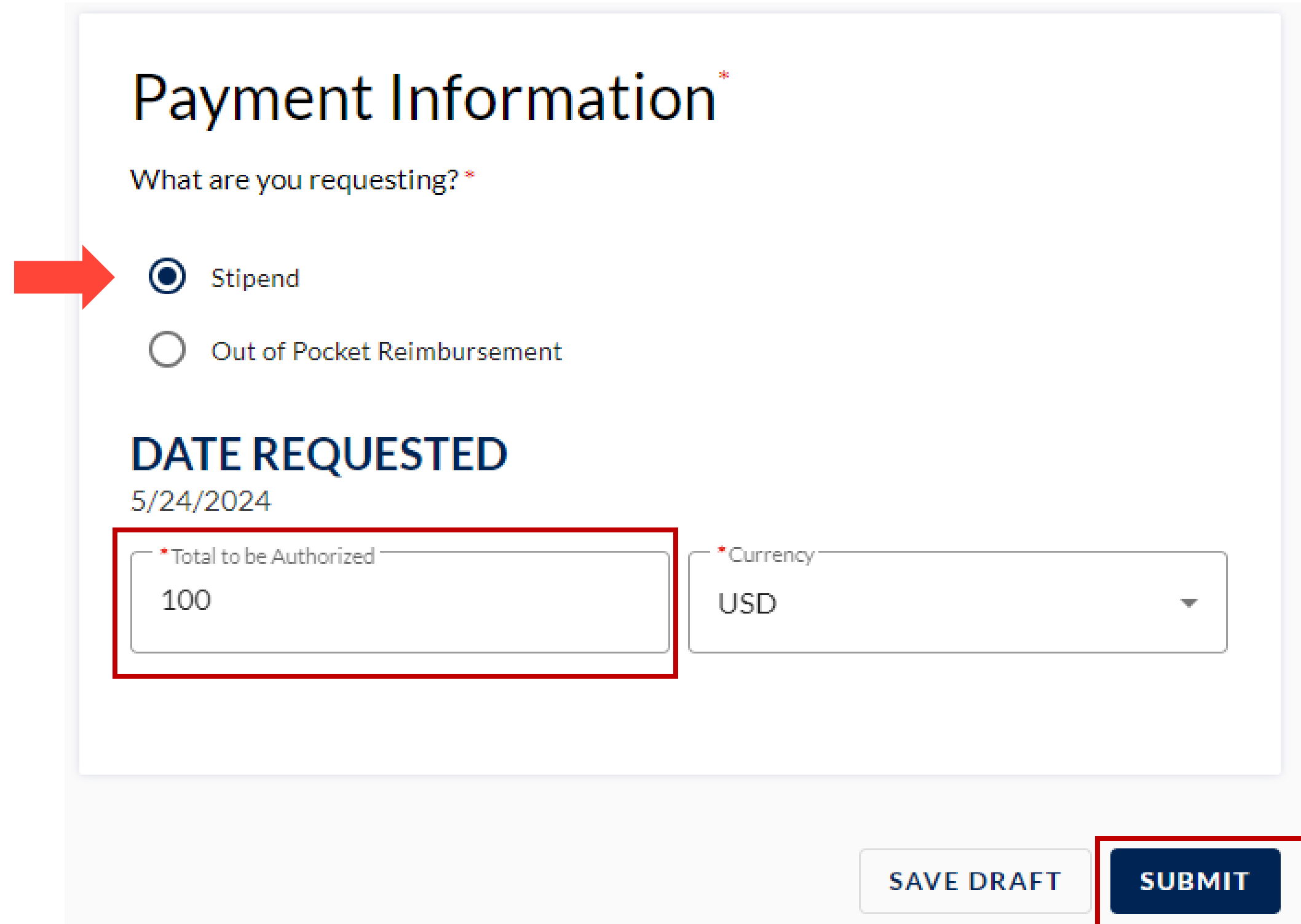
Patient Overview

New Travel Request

New Payment Request

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.



The screenshot shows a web form titled "Payment Information*". A red arrow points to the "Stipend" radio button under the question "What are you requesting? *". Below this, the "DATE REQUESTED" is set to "5/24/2024". A red box highlights the "Total to be Authorized" input field, which contains the value "100". To its right is a "Currency" dropdown menu set to "USD". At the bottom right, there are two buttons: "SAVE DRAFT" and "SUBMIT", with the "SUBMIT" button highlighted by a red box.

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”

Visit Details

SITE #
005

SITE ADDRESS
5375 Medpace Way Santa Cruz , CA 90210

Visit Name*
Visit 1

Visit Date*
4/10/2023

Payment Request Type


What are you requesting? *

☐ Stipend

☒ Out of Pocket Reimbursement

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 (MUST be .pdf or .jpg file). Please note that you **must** upload supporting documents/receipts for expenses to be eligible for reimbursement.



The diagram illustrates the process of adding an expense and uploading a receipt. On the left, a dropdown menu for "expense type*" is shown with the following options: Public Transit, Visa, Translations, Taxi/Ride Share, Parking, and Tolls. A red arrow points from this menu to the right, where a form is displayed. The form includes a section for uploading a receipt, with instructions: "Please upload files only in *.pdf, *.jpg, *.jpeg, *.png formats." Below this is a blue cloud icon with an upward arrow. A button labeled "UPLOAD DOCUMENT" is positioned below the upload area. At the bottom of the form, there are two input fields: "Transaction Date*" with the value "4/10/2023" and a calendar icon, and "Amount to be Authorized*" with the value "30".

expense type*

Select Expense Type

Public Transit

Visa

Translations

Taxi/Ride Share

Parking

Tolls

expense type*

Meal

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

UPLOAD DOCUMENT

Transaction Date*

4/10/2023

Amount to be Authorized*

30

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.

The screenshot shows the 'ADD EXPENSE' form. A red arrow points to the 'expense type' dropdown menu, which is currently set to 'Meal'. Another red arrow points to the 'Transaction Date' field, which is set to '4/10/2023'. A third red arrow points to the 'Amount to be Authorized' field, which is set to '30'. A fourth red arrow points to the 'SUBMIT' button at the bottom right of the form. The form also includes an 'UPLOAD DOCUMENT' button and a 'DATE REQUESTED' field set to '4/19/2023'. The 'Total to be Authorized' field is set to '30' and the 'Currency' is set to 'USD'.

expense type*
Meal

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

UPLOAD DOCUMENT

Transaction Date*
4/10/2023

Amount to be Authorized*
30

ADD EXPENSE

DATE REQUESTED
4/19/2023

Total to be Authorized*
30

Currency*
USD

SAVE DRAFT SUBMIT

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.

Submit Request

Additional Information

Visit on 4/10/23 was for an echocardiogram and was a part of patient's screening

CANCEL **CONFIRM**



The background is a solid dark blue. On the left side, there is a vertical arrangement of light blue circles of various sizes, some connected by thin horizontal lines, creating a network-like structure. Scattered across the right side are several solid dark blue circles of different diameters.

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.

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	⋮
005-002	Claudia	Peppers	12/5/2022	Patient Overview New Travel Request New Payment Request

Patient Overview

ADD NEW REQUEST

PATIENT ID
007-001

PATIENT NAME
Princess Fiona

SPONSOR
Demo Therapeutics

PROTOCOL
ABC-123-201

SITE #
005

Patient's Requests

EXPORT AS .CSV

Filter Patient Requests

Search

Status
Filter by Status

Visit Name
Filter by Visit Name

Visit Date
-

Request Type
Filter by Request Type

Request Date
-

APPLY FILTERS

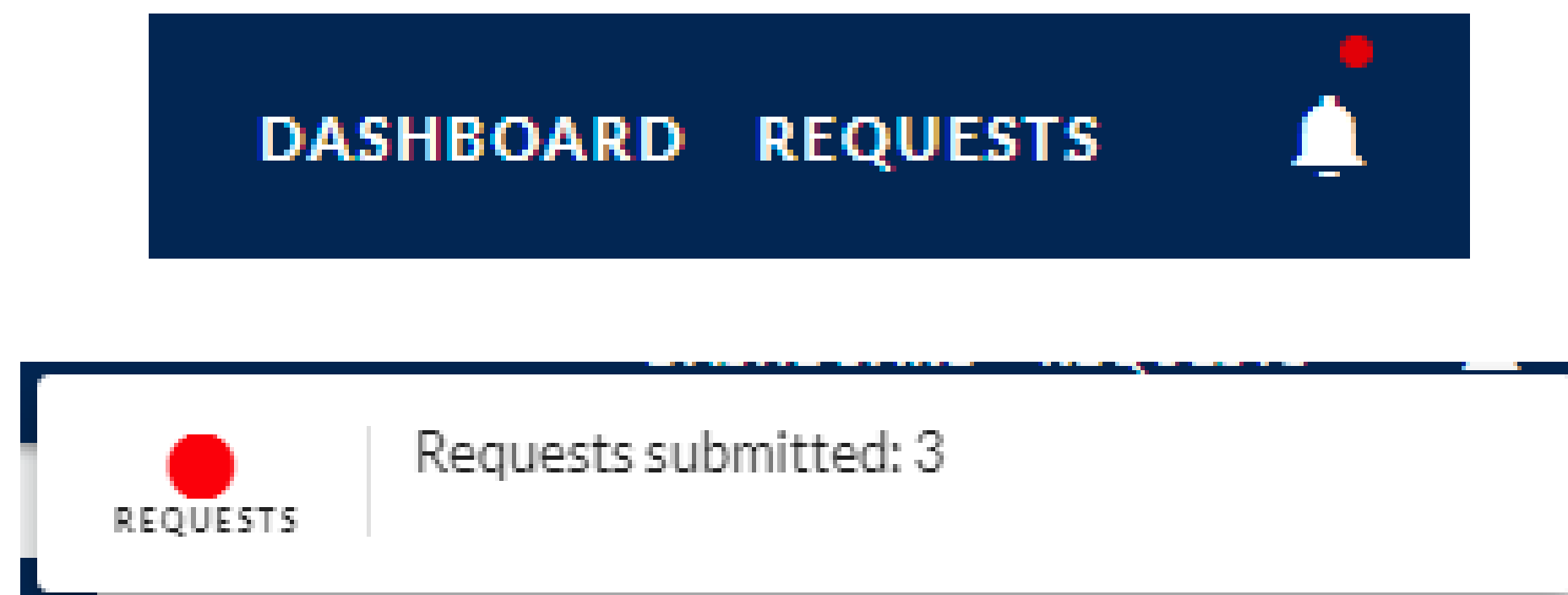
RESET

VISIT NAME	VISIT DATE	REQUEST DATE	REQUEST TYPE	STATUS	PAYMENT READY
Early Termination Visit	12/15/2022	12/19/2022	Travel	Submitted	--

Items per page: 10 1 - 1 of 1

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.



VIEW ALL REQUESTS

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

Requests

[EXPORT AS .CSV](#)

Filter Requests

Search

Protocol
Filter by Protocol

Patient ID
Filter by Patient ID

Status
Submitted

Visit Name
Filter by Visit Name

Visit Date
-

Request Type
Filter by Request Type

Request Date
-

[APPLY FILTERS](#)[RESET](#)

PATIENT ID	PATIENT NAME	PROTOCOL	VISIT NAME	VISIT DATE	REQUEST DATE	REQUEST TYPE	STATUS	PAYMENT READY
005-002	Claudia Peppers	ABC-123-201	Visit 4	11/1/2022	9/21/2022	Travel	Submitted	--
007-001	Princess Fiona	ABC-123-201	Early Termination Visit	12/15/2022	12/19/2022	Travel	Submitted	--
005-002	Claudia Peppers	ABC-123-201	Visit 4	12/5/2022	1/2/2023	Reimbursement	Submitted	No

Items per page: 101 - 3 of 3<>



STATUS MEANINGS

- **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.



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



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	<div>Submitted</div>	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.



PCS REVIEW

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.



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



THANK YOU