

Release Note

Click to Accept User Agreement and Declare Financial Links

Date: 10 March 2017
Owner: MedCo Registration Solutions
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Release Note

All MedCo users are required to annually click to accept the relevant MedCo User Agreement (UA) and to declare Financial Links.

Subject to relevant notice clauses, MedCo may also from time to time issue new UAs that users must click to accept. Please note, each time a new UA is issued Financial Links must also be declared.

Users are also reminded that the obligation to keep Financial Links up to date is ongoing and is not restricted to an annual basis. It is possible to update Financial Links at any time.

Failure to click to accept the relevant MedCo User Agreement (UA) and to declare Financial Links will result in the suspension of the users account.

This document provides instructions on;

- who can click to accept the UA and declare Financial Links
- how you will know when to click to accept the UA and declare Financial Links and
- how to click to accept the UA and declare Financial Links.

Who can click to accept the UA and declare Financial Links?

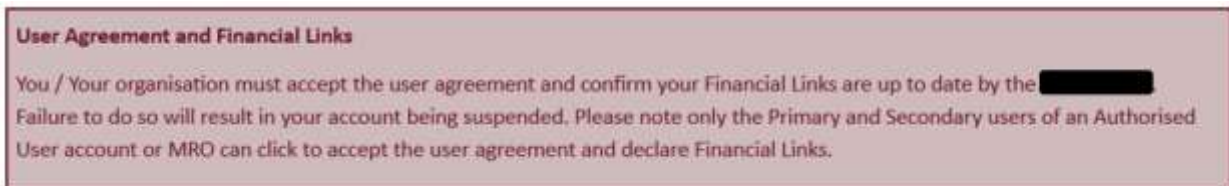
Direct Medical Experts (DMEs) and Indirect Medical Experts (IMEs) can log in and click to accept the UA and declare Financial Links.

Only the Primary and Secondary users of an Authorised User (AUT) account or Medical Reporting Organisation (MRO) can log in a click to accept the UA and declare Financial Links.

How will you know when to click to accept the UA and declare Financial Links?

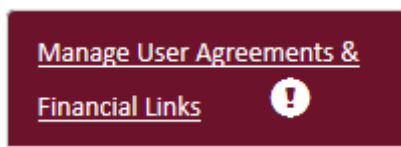
1. Dashboard Notification

All users will be notified that it is time to accept the UA and declare Financial Links via a dashboard notification. The notification will provide the date by which the user must accept the new UA.



2. Manage User Agreements & Financial Links

DMEs, IMEs and both the Primary and Secondary Users of an AUT account or MRO will see a new option to Manage User Agreements & Financial Inks on the Main Menu when they log in. It will be highlighted as shown below when there is action to take.



3. Email Notification

In addition to the dashboard and the highlighting of the Mangage User Agreement Main Menu option, an email notification will be sent to DMEs, IMEs and both the Primary and Secondary User of an AUT account and MRO.

4. Reminder Email Notification

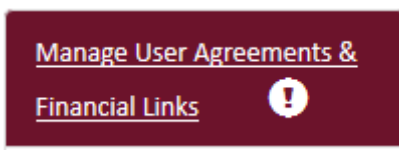
If the UA and Financial Links have not been accepted, an email reminder will be sent to to DMEs, IMEs and both the Primary and Secondary User of an AUT account and MRO Organisation before the deadline.

How to click to accept the UA and declare Financial Links?

If you are a DME, IME, the Primary or Secondary User of either an AUT account or MRO, to click to accept the UA and declare Financial Links follow the steps below

Note: you must complete both the 'MedCo user agreement' and 'Financial Links' sections before the 'Save' button will become enabled.

1. Log in to your account <https://app.medco.org.uk/>
2. From the Main Menu select "Manage User Agreement and Financial Links"



3. Under the header **MedCo User Agreement**, click on the "MedCo User Agreement" hyper link to open and read the agreement.

Note: You will need to open the link and view the agreement in order to proceed.

Medco User Agreement

Please click on this link to view or download the User Agreement. You will need to view the User Agreement in order to proceed

Accept User Agreement? [MedCo User Agreement](#)

4. Change the Accept User Agreement from "No" to "Yes". You will now be able to declare Financial Links.
5. Under the header Financial Links, follow the steps below according to your own set of circumstances.

Note: it is your responsibility to ensure the Financial Links information provided is accurate and up to date.

No existing Financial Links and No new Financial Links to declare.

6. If you do not have any existing Financial Links or new links to declare, select “Yes” to the question “Do you confirm that your Financial Links declaration is up-to-date?”



Financial Links

Financial Links updated on: 17/02/2017 by [redacted]

Do you have any financial links to declare? [Statement of Declaration of Links](#)
If you are unable to find an organisation that you have a link with, that is probably because they have yet to register to use the service. Please return to this page regularly to check for their presence and declare the link as required

Do you confirm that your financial link declaration is up-to-date?

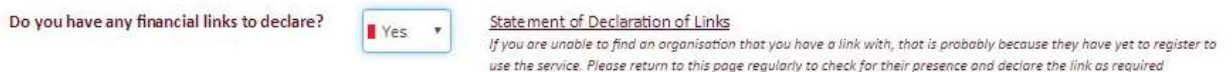
7. Press “Save”. Your answers will be saved and the next annual User Agreement and Financial Links date will be set.



[Return To Main Menu](#)

No existing Financial Links and New Financial Links to declare.

8. If you do not have any existing Financial Links and have new Financial Links to declare, select “Yes” to the question “Do you have any Financial Links to declare?”



Do you have any financial links to declare? [Statement of Declaration of Links](#)
If you are unable to find an organisation that you have a link with, that is probably because they have yet to register to use the service. Please return to this page regularly to check for their presence and declare the link as required

9. To add the detail of the organisation(s) you have Financial Links with click on “Amend” located within the Links box.



Financial Links updated on: 14/02/2017

Links

10. Use the “Search” field or scroll down the list to find the name of the organisation(s) you have a financial link with. To select an organisation “click” on the organisation name.
11. Once you have added the organisation(s) click “Save” in the Links box
12. Next, select “Yes” to the question “Do you confirm that your Financial Links declaration is up-to-date?”



Do you confirm that your financial link declaration is up-to-date?

13. Press “Save”. Your answers will be saved and the next annual User Agreement and Financial Links date will be set.



[Return To Main Menu](#)

Existing Financial Links declared and no changes required.

14. If you have existing Financial Links and have no changes to make, select “Yes” to the question “Do you confirm that your financial link declaration is up-to-date?”

Financial Links

Financial Links updated on: 03/03/2017 by [REDACTED]

Links

MIB AUT (12345)

[Amend](#)

Do you have any financial links to declare?

Yes

[Statement of Declaration of Links](#)

If you are unable to find an organisation that you have a link with, that is probably because they have yet to register to use the service. Please return to this page regularly to check for their presence and declare the link as required

Do you confirm that your financial link declaration is up-to-date?

Yes

15. Press “Save”. Your answers will be saved and the next annual User Agreement and Financial Links date will be set.



Existing Financial Links declared changes required

16. If you have existing Financial Links and wish to add or remove links, select “Amend” in the Links box?

Financial Links

Financial Links updated on: 21/02/2017 by [REDACTED]

Links

Crate NewUser LLP

[Amend](#)

17. **To add** a Financial Link, use the “Search” box or scroll down the list to find the name of the organisation(s) you have a financial link with. To select an organisation “click” on the organisation name.
18. **To remove** a Financial Link, “uncheck” the tick box next the organisation(s) you have previously declared a link to.

Links

Crate NewUser LLP

19. Once you have made the changes press “Save” located at the bottom of the Links box
20. **IMPORTANT:** If you have removed all previous Financial Links and no longer have any to declare, you must select “No” to the question “Do you have any Financial Links to declare?”

Do you have any financial links to declare?

No

[Statement of Declaration of Links](#)

If you are unable to find an organisation that you have a link with, that is probably because they have yet to register to use the service. Please return to this page regularly to check for their presence and declare the link as required

21. Next, select “Yes” to the question “Do you confirm that your Financial Links declaration is up-to-date?”

Do you confirm that your financial link declaration is up-to-date?

 Yes

22. Once you have completed the changes, press “Save”. Your answers will be saved and the next annual User Agreement and Financial Links date will be set.