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## MedCo Data Validation Rules

This document describes the collection of data that is required to be uploaded to the MedCo application: users, experts, medical report case data and data to close cases.

Date: 19 October 2018  
Owner: MedCo Registration Solutions

# Purpose

This document has been designed to aid MedCo users when providing data either manually or via the bulk upload facility.

When entering data manually, the system will show 'friendly' selection boxes. For bulk file upload, please use the codes found in the Value column of the tables found in this document.

The MedCo system holds two data sets. The first type of data is referred to as '**Directory Data**' and the second type is referred to as '**Case Data**'.

## 1. Directory Data

The first data set is Directory Data. This set will hold three directory lists:

### 1.1. Branches (AUT Users Only)

This is a list of branches belonging to an authorised user (not a Direct Medical Expert or MRO) organisation that has registered with MedCo. This list is keyed into the system by the Admin user (or primary or secondary contact) of the organisation once their organisation's registration has been approved by MedCo.

The data fields required to be provided are:

Table 1.1

Field Name	Field Attribute	Length	Value	Note
Name	Character	128		Branch location <b>This data is mandatory</b>
Address line 1	Character	60		Branch address line 1 This data is optional
Address line 2	Character	60		Branch address line 2 This data is optional
Address line 3	Character	60		Branch address line 3 This data is optional
Post code	Alphanumeric	8		Branch post code This data is optional

### 1.2. Users (AUT and MRO Users Only)

This is a list of users belonging to each organisation that has registered with MedCo. The organisation can either be that of an instructing party or one that is being instructed. This list can be keyed in manually or uploaded via the bulk upload facility by the admin user (or primary or secondary contact) of the organisation once their organisation's registration has been approved by MedCo.

**Important Note:** The person who does the bulk upload must ensure that any users already created as a primary or secondary user are **NOT** to be included in this file as they will have existed within the system and already have access. The system will produce an error if a duplicate email is being used for creation of users.

**Further Note:** If the organisation wishes to assign users to branches, the branches must be created manually **prior** to bulk user upload. If this is not done all users will be assigned to the Default branch.

The data fields required for upload are:

Table 1.2

Field Name	Field Attribute	Length	Value	Note
<b>Organisation User</b>	Character	11	One of: <b>Operational, Admin</b>	<b>This data is mandatory</b>
<b>Email address</b>	Alphanumeric	256	Must contain @	User email address. <b>This data is mandatory</b>
<b>Title</b>	Character	4	One of: <b>Dr, Mr, Mrs, Miss, Ms</b>	<b>This data is mandatory</b>
<b>First name</b>	Character	60		<b>This data is mandatory</b>
<b>Last name</b>	Character	60		<b>This data is mandatory</b>
<b>Direct telephone</b>	Numeric	20		<b>This data is mandatory</b>
Mobile telephone (if applicable)	Numeric	20		This data is optional
Branch Name	Character	128	This field is only applicable to authorised user organisations	This data is optional. See Further Note above

### 1.3. Medical Experts (MRO Only)

This is a list of medical experts contracted with the medical reporting organisation (MRO) who has registered with MedCo. Once a MRO's registration has been approved by MedCo, it is a requirement that this list is maintained on the MedCo database. The MRO is responsible for maintaining a **full up-to-date list** of its expert panel at a pre-agreed interval. Medical experts can either be keyed directly into the system or uploaded via a bulk upload facility.

**Important Note:** If the bulk upload function is used, it will overwrite **ALL** previously saved medical experts for the MRO. It is therefore important that the full dataset is provided each time, **NOT** a delta.

The data fields required for upload are:

Table 1.3

Field Name	Field Attribute	Length	Value	Note
<b>First name</b>	Character	30		Medical expert's first name. <b>This data is mandatory</b>
<b>Last name</b>	Character	30		Medical expert's last name. <b>This data is mandatory</b>
<b>Professional identifier</b>	Alphanumeric	20		General Medical Council (GMC) number (or equivalent) / HCPC number. <b>This data is mandatory</b>

## 2. Case Data

The second data set is Case Data. In order to carry out a search on the Directory Data, Authorised Users will need to create a case within the MedCo database. Cases can only be created manually.

### 2.1. Case Data Upload (MRO and DMEs only)

After the medical examination has taken place, the instructed medical expert or MRO is required to provide to MedCo anonymised case data against the MedCo cases that have been commissioned with them.

Case data can either be uploaded:

- a) In bulk via a csv file. This allows the upload of several to hundreds of cases at the same time.  
Or
- b) By manually entering data case by case via a screen interface

If the Bulk upload method is selected, Table 2.1 lists the data that are required to be provided for each claimant on a case within a CSV file.

If there is more than one diagnosis for a given claimant, data pertaining to each additional diagnosis must be provided in the same row.

Table 2.1

Column	Field name	Field attribute	Length	Value	Note
A	<b>MedCo case ID/n</b>	Alphanumeric (99999999/9)	10		Case ID generated by the MedCo application. The /n indicates the number of claimants (up to a maximum of 9) <b>per case</b> <b>This data is mandatory</b>
B	<b>GMC / HCPC number</b>	Alphanumeric	20		General Medical Council (GMC) number (or equivalent) / HCPC number of the individual undertaking the examination (if direct expert has been instructed) <b>This data is mandatory</b>
C	<b>Date of report</b>	Date (DD/MM/YYYY)	10		Date the report was produced by the medical expert <b>This data is mandatory</b>
D	<b>Date of examination</b>	Date (DD/MM/YYYY)	10		Date the claimant was examined by the medical expert <b>This data is mandatory</b>
E	<b>Time spent with claimant</b>	Numeric	3		Duration in minutes (1 to 999) <b>This data is mandatory</b>

Column	Field name	Field attribute	Length	Value	Note														
F	Number of Diagnoses	Numeric	2	If <b>Unable to diagnose</b> or <b>No injury occurred</b> , enter value <b>1</b>	Specify the number of diagnoses as a result of the examination. <ul style="list-style-type: none"> <li>If 1 injury found, enter 1; if 2 found enter 2; and so on.</li> <li>If Unable to diagnose or if there was No injury occurred, enter 1</li> </ul> <b>This data is mandatory</b>														
G	Claimant's examination outcome	Numeric	1	One of: <b>0, 1, 2</b>	Outcome of the IP's examination. <b>This data is mandatory.</b> Enter <b>one</b> of the following: <table border="1"> <thead> <tr> <th>Value</th> <th>Meaning</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>Unable to diagnose</td> </tr> <tr> <td>1</td> <td>No injury occurred</td> </tr> <tr> <td>2</td> <td>Injury diagnosed</td> </tr> </tbody> </table> Where there was <b>No injury occurred</b> , no further data are required i.e. the remaining columns should be left blank.	Value	Meaning	0	Unable to diagnose	1	No injury occurred	2	Injury diagnosed						
Value	Meaning																		
0	Unable to diagnose																		
1	No injury occurred																		
2	Injury diagnosed																		
H	Claimant's Injury Diagnosis	Numeric	1	One of: <b>0, 1, 2, 3, 4</b>	<b>If examination outcome = 2, this data is mandatory.</b> Where injury is <b>Physical</b> , enter one of the following: <table border="1"> <thead> <tr> <th>Value</th> <th>Meaning</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>Neck</td> </tr> <tr> <td>1</td> <td>Back</td> </tr> <tr> <td>2</td> <td>Discreet shoulder injury</td> </tr> <tr> <td>3</td> <td>Other</td> </tr> </tbody> </table> Or, where injury is <b>Psychological</b> , enter: <table border="1"> <thead> <tr> <th>Value</th> <th>Meaning</th> </tr> </thead> <tbody> <tr> <td>4</td> <td>Psychological</td> </tr> </tbody> </table>	Value	Meaning	0	Neck	1	Back	2	Discreet shoulder injury	3	Other	Value	Meaning	4	Psychological
Value	Meaning																		
0	Neck																		
1	Back																		
2	Discreet shoulder injury																		
3	Other																		
Value	Meaning																		
4	Psychological																		
I	Additional report	Numeric	1	One of: <b>0, 1</b>	Enter one of the following as appropriate: <table border="1"> <thead> <tr> <th>Value</th> <th>Meaning</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>Yes</td> </tr> <tr> <td>1</td> <td>No</td> </tr> </tbody> </table>	Value	Meaning	0	Yes	1	No								
Value	Meaning																		
0	Yes																		
1	No																		
J	Additional treatment	Numeric	1	One of: <b>0, 1, 2</b>	Enter one of the following as appropriate: <table border="1"> <thead> <tr> <th>Value</th> <th>Meaning</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>Yes</td> </tr> <tr> <td>1</td> <td>No</td> </tr> <tr> <td>2</td> <td>Already in progress</td> </tr> </tbody> </table>	Value	Meaning	0	Yes	1	No	2	Already in progress						
Value	Meaning																		
0	Yes																		
1	No																		
2	Already in progress																		

Column	Field name	Field attribute	Length	Value	Note																
K	Type of additional treatment	Numeric	1	One of: <b>0, 1, 2, 3, 4, 5, 6</b>	<p>If <b>Additional treatment is required</b> or <b>Treatment already in progress</b>, <b>MUST</b> enter one of the following:</p> <table border="1"> <thead> <tr> <th>Value</th> <th>Meaning</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>Medication treatment</td> </tr> <tr> <td>1</td> <td>Physiotherapy/ Osteopathy</td> </tr> <tr> <td>2</td> <td>Other</td> </tr> <tr> <td>3</td> <td>X-ray/ MRI scans/ Ultrasound</td> </tr> <tr> <td>4</td> <td>Surgery</td> </tr> <tr> <td>5</td> <td>Cognitive Behavioural Therapy</td> </tr> <tr> <td>6</td> <td>Combination of the above</td> </tr> </tbody> </table>	Value	Meaning	0	Medication treatment	1	Physiotherapy/ Osteopathy	2	Other	3	X-ray/ MRI scans/ Ultrasound	4	Surgery	5	Cognitive Behavioural Therapy	6	Combination of the above
Value	Meaning																				
0	Medication treatment																				
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2	Other																				
3	X-ray/ MRI scans/ Ultrasound																				
4	Surgery																				
5	Cognitive Behavioural Therapy																				
6	Combination of the above																				
L	Claimant's injury prognosis	Numeric	1	One of: <b>0, 1, 2, 3, 4</b>	<p>If injury diagnosis = <b>3 (Other)</b> this field should be left <b>blank</b></p> <p>If injury diagnosis value is either <b>0, 1, 2</b> or <b>4</b>, select one of the following:</p> <table border="1"> <thead> <tr> <th>Value</th> <th>Meaning</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>&lt; 1 month,</td> </tr> <tr> <td>1</td> <td>1 month or greater</td> </tr> <tr> <td>2</td> <td>Guarded</td> </tr> <tr> <td>3</td> <td>Permanent</td> </tr> <tr> <td>4</td> <td>Unable to provide a prognosis</td> </tr> </tbody> </table>	Value	Meaning	0	< 1 month,	1	1 month or greater	2	Guarded	3	Permanent	4	Unable to provide a prognosis				
Value	Meaning																				
0	< 1 month,																				
1	1 month or greater																				
2	Guarded																				
3	Permanent																				
4	Unable to provide a prognosis																				
M	Claimant's injury prognosis duration *	Numeric	3		<p>If injury diagnosis = <b>3 (Other)</b> this field should be left <b>blank</b></p> <p>Where Claimant's injury prognosis is <b>1 month or greater</b>, <b>MUST</b> enter duration in number of months (1 to 999)</p>																

**\* IMPORTANT : The injury prognosis must be entered from the date of the accident.**

### 2.1.1. Upload process via CSV file

- 1) When uploading their CSV file(s) to the MedCo application, the file(s) will be immediately checked for any obvious formatting errors (such as blank data where input is required, length of data exceeded, empty file, wrong file format).
- 2) If errors are found, the user will then be advised that the file cannot be processed together with the reason(s).
- 3) If no errors are detected, the user will be advised that their case file has been submitted successfully and the user can exit the upload process when done.
- 4) The file(s) is/are placed in a queue and processed by the system at a later point, on a record by record basis.
- 5) The user will be able to log back onto the system the following day to view a list of their previous submissions:
  - a. For those where processing has completed, the number of uploaded cases AND number of cases with errors will be displayed.
  - b. For those files completed with errors, the user will be able to click a link to download the error file (file will contain the cases as originally submitted, with an additional column describing the error added at the end).

### 2.1.2. Example CSV

Use the following link to obtain a Sample CSV with explanations. <http://www.medco.org.uk/media/1082/casesdataupload-v21-1707.xlsx>

### 2.1.3. Error scenarios in Case data upload

The following is a list of possible error scenarios the user may encounter when uploading a case data csv file:

- 1) File extension is not .csv
- 2) No file selected by the user
- 3) File contains headers (i.e. field titles) instead of only data rows
- 4) Blanks in one of the mandatory fields (for example MedCo Case ID field is empty and/or GMC/HPCPC field is empty etc.
- 5) MedCo case id does not match with the instructed party's MedCo case reference
- 6) GMC or HCPC does not belong to the MRO who uploads the report(s)
- 7) American date format
- 8) Date of report is earlier than date of examination (it is acceptable for date of report to be the same or later than date of examination)
- 9) Date of examination is earlier than date of accident
- 10) Characters or numbers in date fields
- 11) Characters in numeric fields
- 12) Wrong values in numeric fields – for example, Claimant's injury outcome has a value of 3 (allowed values are 0,1 and 2)
- 13) Unrequired data – for example, a value is provided where it should have been blank
- 14) Missing data – for example, a value is required and the column has been left blank
- 15) Field length exceeded – for example, number of diagnoses is set to 100 (typo error instead of 10)
- 16) Number of diagnoses uploaded does not correspond with the number of diagnoses provided in the csv file. For example, number of diagnoses = 3, however only 2 groups of data pertaining to each diagnosis were provided in the csv file

## 2.2. Close case data (MRO and DMEs only)

In accordance with the user agreements Direct Medical Experts (DMEs) or Medical Reporting Organisations (MROs) must close cases and provide information where they have been selected and have knowledge that a **Formal Instruction/examination** is not being progressed as this is covered by the requirement to provide Database Data.

To close a case for reasons other than uploading case data about a claimant, a DME / MRO must provide information to MedCo why they are closing the case. The options available are;

- The claimant did not attend
- The instructing party cancelled the selection
- No formal instructions received
- Not a soft tissue injury claim

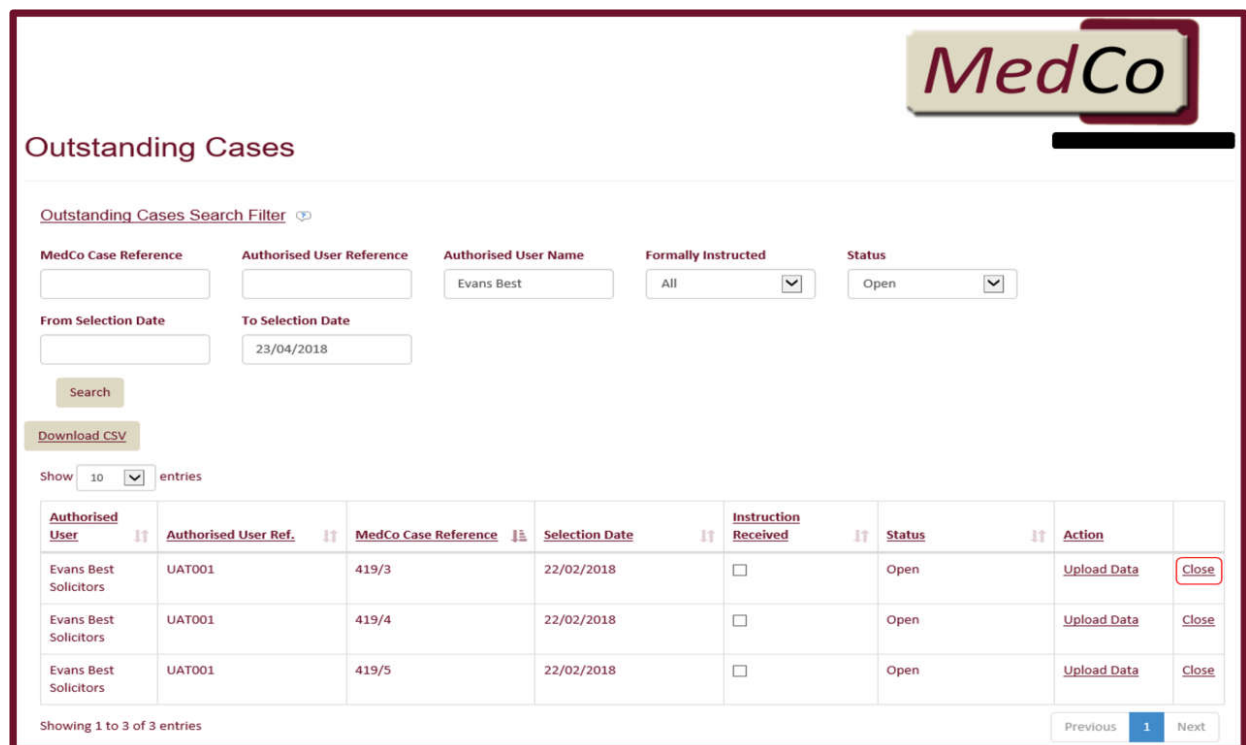
*Note: You can only close one case at a time.*

To close a case follow the steps below;

1. On the **Outstanding Cases** screen use the filters to retrieve the case(s) that you wish to close.

*Tip: Use the **From Selection Date** and **To Selection Date** fields to retrieve as many cases as possible.*

2. The tabulated results will have two Action columns: **Upload Data** and **Close**. Select **Close** for the case you wish to remove from the list.



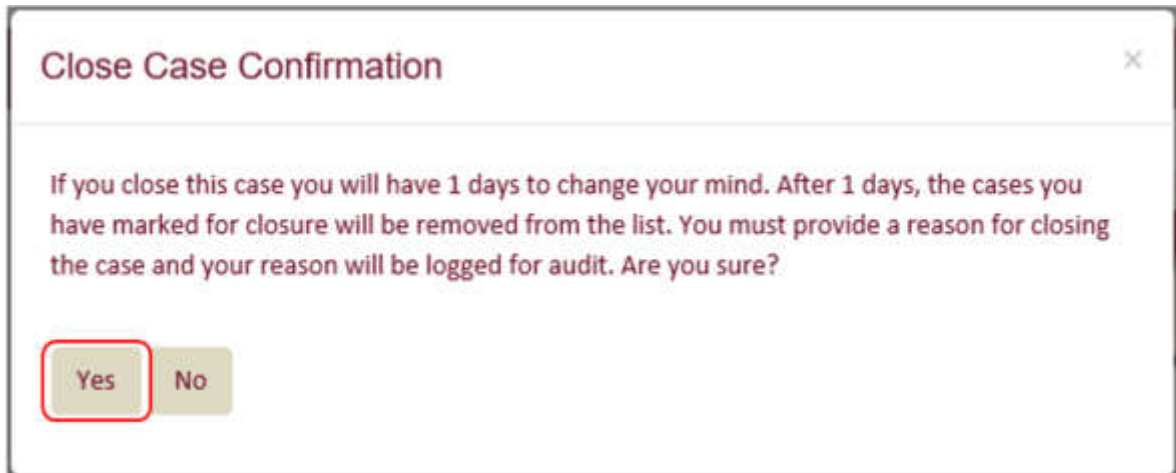
The screenshot shows the 'Outstanding Cases' interface. At the top right is the MedCo logo. Below it is the title 'Outstanding Cases'. A search filter section includes fields for 'MedCo Case Reference', 'Authorised User Reference', 'Authorised User Name' (with 'Evans Best' selected), 'Formally Instructed' (with 'All' selected), and 'Status' (with 'Open' selected). There are also 'From Selection Date' and 'To Selection Date' (with '23/04/2018' selected) fields, a 'Search' button, and a 'Download CSV' button. Below the search filter, it says 'Show 10 entries'. A table displays the results:

Authorised User	Authorised User Ref.	MedCo Case Reference	Selection Date	Instruction Received	Status	Action
Evans Best Solicitors	UAT001	419/3	22/02/2018	<input type="checkbox"/>	Open	Upload Data Close
Evans Best Solicitors	UAT001	419/4	22/02/2018	<input type="checkbox"/>	Open	Upload Data Close
Evans Best Solicitors	UAT001	419/5	22/02/2018	<input type="checkbox"/>	Open	Upload Data Close

At the bottom, it says 'Showing 1 to 3 of 3 entries' and has 'Previous', '1', and 'Next' navigation buttons.



3. A message will be displayed to notify you that you will have to provide a reason for closing the case and that it can be reopened within a set number of days if the circumstances change for the case. Click **Yes** to proceed to close the case.

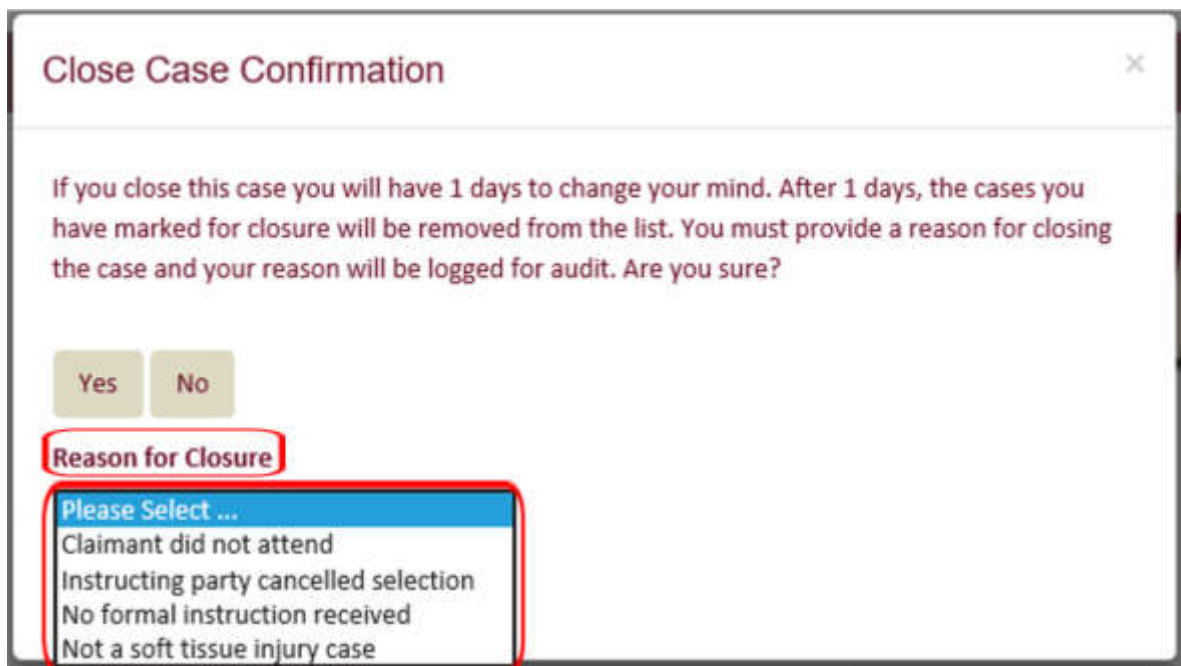


Close Case Confirmation

If you close this case you will have 1 days to change your mind. After 1 days, the cases you have marked for closure will be removed from the list. You must provide a reason for closing the case and your reason will be logged for audit. Are you sure?

Yes No

4. Select one of the **Reason for Closure** from the dropdown list.



Close Case Confirmation

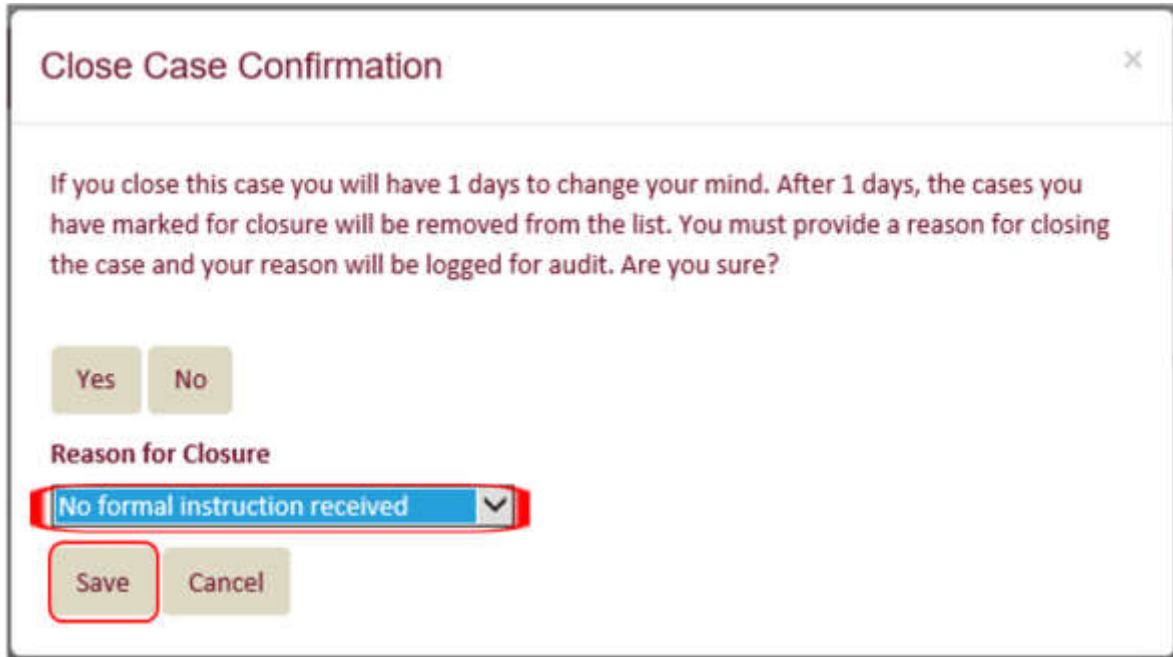
If you close this case you will have 1 days to change your mind. After 1 days, the cases you have marked for closure will be removed from the list. You must provide a reason for closing the case and your reason will be logged for audit. Are you sure?

Yes No

Reason for Closure

- Please Select ...
- Claimant did not attend
- Instructing party cancelled selection
- No formal instruction received
- Not a soft tissue injury case

5. Select **Save** to confirm your decision.



The image shows a 'Close Case Confirmation' dialog box. It contains the following elements:

- Title:** Close Case Confirmation
- Text:** If you close this case you will have 1 days to change your mind. After 1 days, the cases you have marked for closure will be removed from the list. You must provide a reason for closing the case and your reason will be logged for audit. Are you sure?
- Buttons:** Yes, No
- Section:** Reason for Closure
- Dropdown:** No formal instruction received (highlighted with a red box)
- Buttons:** Save, Cancel (the Save button is highlighted with a red box)

6. Having saved the Reason for Closure you are then returned to your list of search results on the Outstanding Cases screen.
7. The case that has just been closed will be highlighted for a set number of days during which time you are able to reopen it if the circumstances have changed. See example below.

**Outstanding Cases**

Outstanding Cases Search Filter

MedCo Case Reference:

Authorised User Reference:

Authorised User Name:

Formally Instructed:

Status:

From Selection Date:

To Selection Date:

Show  entries

Authorised User	Authorised User Ref.	MedCo Case Reference	Selection Date	Instruction Received	Status	Action
Evans Best Solicitors	UAT001	419/3	22/02/2018	<input type="checkbox"/>	Closed No formal instruction received	<input type="button" value="Reopen"/>
Evans Best Solicitors	UAT001	419/4	22/02/2018	<input type="checkbox"/>	Open	<input type="button" value="Upload Data"/> <input type="button" value="Close"/>
Evans Best Solicitors	UAT001	419/5	22/02/2018	<input type="checkbox"/>	Open	<input type="button" value="Upload Data"/> <input type="button" value="Close"/>

Showing 1 to 3 of 3 entries

- After this set number of days, it will be permanently removed from your list of cases and will no longer appear in a search result.
- To view closed cases use the **Search for Closed/Archived Cases** function on the main menu.

### 2.2.1. Re-open cases for a limited time period

All the cases that have been closed for reasons other than medical case data upload will be **highlighted** and remain in the DME's or MRO's list of cases for a limited period.

*Note: After this set number of days, the case(s) will be permanently removed from your list of outstanding cases.*

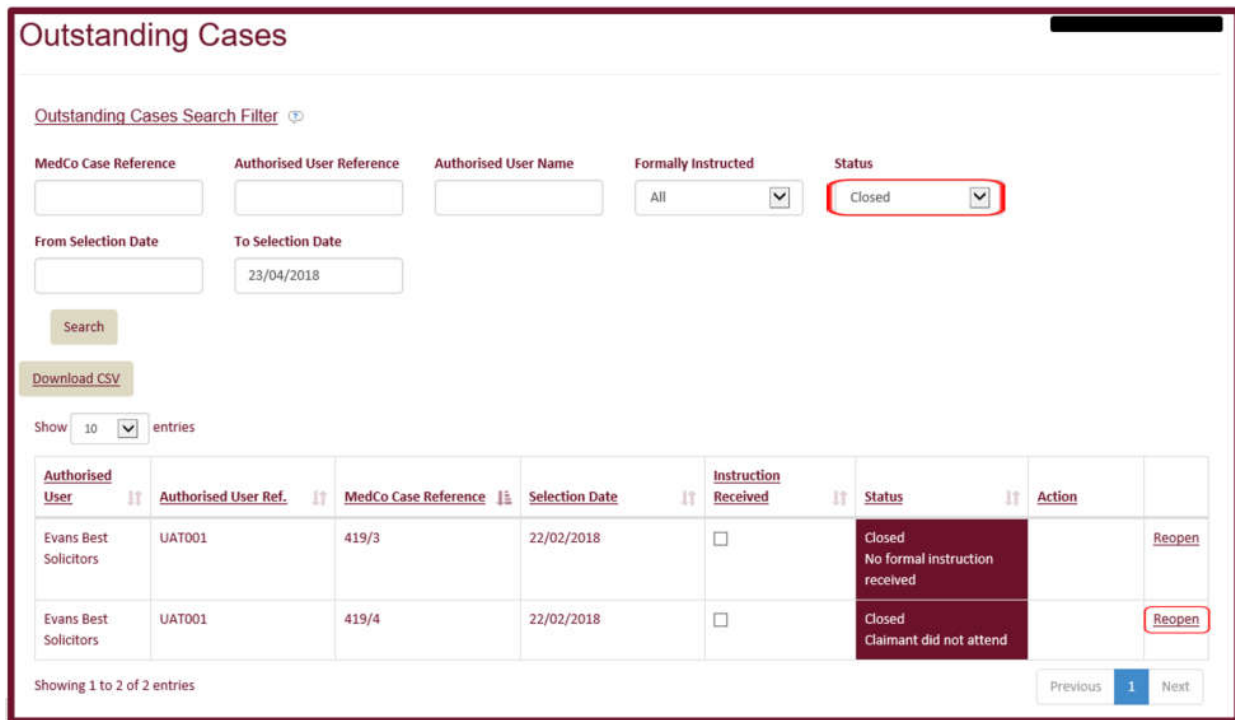
During this period they can be reopened if the circumstances for the cases have changed.

To reopen a case follow the steps below:

- On the **Outstanding Cases** screen use the filters to search for all closed cases by applying the **Status** filter to search for all "Closed" cases.

*Note: You can also search by any other filter to find the case you wish to reopen.*

- Select the case for which circumstance has changed and click **Reopen**.



**Outstanding Cases**

Outstanding Cases Search Filter

MedCo Case Reference:  Authorised User Reference:  Authorised User Name:  Formally Instructed: All  Status: **Closed**

From Selection Date:  To Selection Date: 23/04/2018

Search  Download CSV

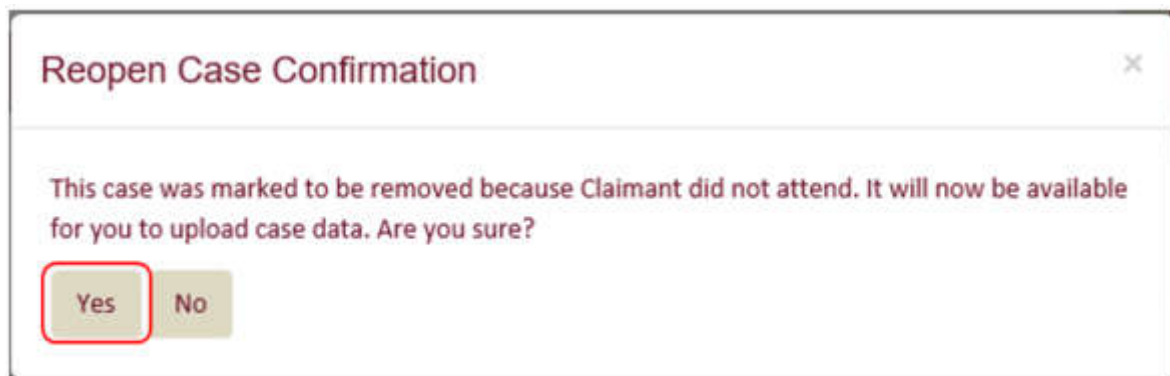
Show 10 entries

Authorised User	Authorised User Ref.	MedCo Case Reference	Selection Date	Instruction Received	Status	Action
Evans Best Solicitors	UAT001	419/3	22/02/2018	<input type="checkbox"/>	Closed No formal instruction received	<a href="#">Reopen</a>
Evans Best Solicitors	UAT001	419/4	22/02/2018	<input type="checkbox"/>	Closed Claimant did not attend	<a href="#">Reopen</a>

Showing 1 to 2 of 2 entries

Previous 1 Next

- A message will display to request your confirmation. Click **Yes** to confirm the reopening of your case.



**Reopen Case Confirmation**

This case was marked to be removed because Claimant did not attend. It will now be available for you to upload case data. Are you sure?

**Yes**  No

- The case is now back in the open outstanding case list and can be marked formally instructed and it is possible to upload case data.