



## MedCo Business Process Guide

### Document Control

<b>Status:</b>	<b>ISSUE v2.0</b>
<b>Issued:</b>	28 March 2019
<b>Document owner:</b>	MedCo Registration Solutions
<b>Document author:</b>	MedCo

### Document Purpose

This document is intended as a guide to assist with navigation through the initial MedCo registration, payment, search and uploads process.

There are separate user agreements and documentation that govern MedCo usage and daily operations.

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## 1. Registrations

This guide covers all the questions that may be applicable to your registration. If we do not need certain information from your organisation you will not be asked to provide it. However, the guide covers all registration types and therefore covers all possible questions and registration variations that may arise.

Once you have submitted your registration application you will receive a confirmation message thanking you for your application and acknowledging successful submission. (There is no email confirmation of this stage of the process). You will not be able to access your details again until your application has been processed by MedCo.

MedCo will review your application and subject to satisfactory verification you will be 'approved' and receive an email to confirm your approved status and invite you to create your MedCo account.

Once the registration process is complete, all the relevant user agreements and policies have been accepted and any applicable fees have been paid, your account will be set to operational.

If you require further information on how your personal data will be used, please check the MedCo Privacy Policy located in the footer of the website at [www.medco.org.uk](http://www.medco.org.uk)

Updates and changes to the registration application details can be made at any time during membership.

### 1.1. Email address

This should be an active email address for you to receive correspondence in relation to your application to register.

### 1.2. Registered address

This field should be populated as per your ICO register details and forms part of the validation checks for registering.

### 1.3. Name

This should be the name of the organisation or the name of the individual if the applicant is a direct expert.

### 1.4. Contacts

#### 1.4.1. Primary contacts

The primary contact is responsible for the service and use of the service within their organisation.

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### 1.4.2. Secondary contacts

The secondary contact is responsible for the service and use of the service within their organisation in the absence or by delegation of the primary contact. Ultimate responsibility rests with the primary contact.

It is not possible to use the same email address for the primary and secondary contacts.

Both contacts receive same correspondence and have same access levels within the system.

Primary and secondary contacts act as the overall administrator for their organisation.

Primary and secondary contacts do not need to be set up as operational users. The primary/secondary contacts can do everything an operational user can do as well as acting as the administrator.

MROs – Upload expert's details and create users.

Authorised Users – create branches and users.

### 1.5. Expert speciality

This applies to direct medical experts only.

The information is used to match searches and allows the user to select a suitable expert from the list of experts that have returned in the search.

### 1.6. GMC/HPC number

This applies to direct medical experts only.

Enter your GMC or HCPC number in full.

This number is used for validating purposes to check with the relevant regulatory authority that you are qualified and authorised to practice.

### 1.7. Gender

This information is used to match searches and allows the user to select a suitable expert from the list of experts that have returned in the search.

### 1.8. GMC/HPC address

This applies to direct medical experts only.

Enter your address details as per your GMC/HCPC registration.

The address is used for validating your GMC/HCPC number/registration

GMC registered address changes are stored and saved when changed from a postcode search address. i.e. address is located by the postcode search facility but is amended slightly to include more information e.g. surgery or clinic name. The amendments will be included in the application and are stored information.

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Amendments can be made to the address at any time during membership.

### 1.9. Correspondence address

Enter the postal address you wish to use for day to day contact and receiving instructions etc. It can be different from the ICO, GMC, HCPC, etc. address(es).

### 1.10. Correspondence email

Enter the email address you wish to use for day to day contact and receiving instructions etc. It can be different from the email address given for the registration.

### 1.11. Practicing address

This applies to direct medical experts only.

It is important that you enter the addresses you regularly practice from. You must enter at least one address and you can enter as many addresses as are applicable. It is important that for each practicing address you provide a full postcode.

Following your approval, you must keep your practicing addresses up to date.



The full postcode of the practicing address is key information as this will form part of the criteria to match searches to experts. Failure to provide practicing addresses with full postcode will mean that the service will be unable to find you in a search for a medical expert.

### 1.12. Year qualification obtained

This applies to direct medical experts only.

Enter the year you obtained your qualification in your areas of expertise.

This is information that the user would normally extract from your CV to help them select a suitable expert. Full CVs will not be uploaded to the MedCo system.

### 1.13. Number of reports handled per annum

This applies to direct experts only.

Enter the number of reports that you produce per annum.

This is information that the user would normally extract from your CV to help them select a suitable expert. The information may also be used for analysis purposes by MedCo.

### 1.14. Areas of expertise

This applies to Consultant Orthopaedic Surgeons registering as direct medical experts only.

If the direct expert is a GP/Doctor, physiotherapist or a consultant in A&E medicine this section does not apply.

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The information is used to allow the user to select a suitable expert from the list of experts that have returned in the search.

### 1.15. Year in active clinical practice

Enter the year in which your practice started for each area of your speciality.

### 1.16. Active

This applies to direct medical experts only.

The definition of 'active' is: 'Available to accept instructions'.

The status should be changed to 'inactive' for any periods of inactivity in excess of two weeks.

The status must be changed back to 'active' once availability to accept instructions is resumed.

When set to "inactive" you will not be available for a search for a medical expert.

### 1.17. Organisation SRA/CILEx Authorised Entity number

This applies to firms of solicitors and firms authorised by CILEx to provide legal work in specific areas.

Enter the firms SRA ID / CILEx Regulation ID number of the organisation in full.

This number is used for validating purposes to check with the relevant regulatory authority that your firm is authorised to practice.

### 1.18. Claims Management Regulator (CRM) number

This applies to claims management companies only.

Enter your Claims Management regulator number

This information is used as a validation check to confirm you/organisation are registered and suitable to use the MedCo service.

### 1.19. MIB member

This applies to Insurers only.

As an insurer you must be a MIB member to register for MedCo.

This information is used as a validation check to confirm you/organisation are registered and suitable to use the MedCo service.

### 1.20. FCA number

Enter your FCA number if you have one.

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This information is used as a validation check to confirm you/organisation are registered and suitable to use the MedCo service.

### 2. General Details

#### 2.1. User agreement acceptance

To obtain full access to the system as an Authorised user, MRO, Indirect or Direct Expert the applicant must agree to the user agreement in full.

It is possible to select 'No' during the initial registration stage and return at a later date to accept as 'Yes' to allow for applicants to review or refer the document within their organisation.

The Agreement is available to view within application page or on the MedCo website.

#### 2.2. Declaration of links

This box should be populated with 'Y' (yes) if you or your organisation have a financial link to a medical reporting agency, an authorised user or a direct medical expert. Links between doctor to doctor or MRO to doctor do not apply and do not need to be declared as links as part of this application.

It is important that you take time to read and understand the definition of financial links. It is not a requirement of your application to declare a list of all MROs or medical experts who you have instructed or provided medical reports for. Only declare links that meet the definition.

##### 2.2.1. Definition of a link for authorised users and medical users

Refer to the MedCo website for the definition. The definition is included within the User Agreement.

##### 2.2.2. Declaration of links

Declaration of links:

- Prevents organisations that are linked returning in the search.
- Links between the supplier and the instructor are the only links that are excluded from the search returns. Links between doctor to doctor or MRO to doctor do not apply.
- Links only need to be indicated by one party to become effective and active.
- It may not be possible at the initial registration stage to declare all your links if the linked party has not yet registered with MedCo.
- The onus is on all user types (direct experts, authorised users and MROs) to regularly review and update their links with other organisations within MedCo.
- You cannot see linked organisations within MedCo unless you have created them. Reports and MI are available from MedCo for monitoring and checking links (see section 1.2.2.3 Disputed Links).

##### 2.2.3. Disputed links



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You cannot see linked organisations within MedCo unless you have created them. Reports and MI are available from MedCo for monitoring and checking links.

If you have a link to your organisation that you did not create you should either:

- Declare the link within your MedCo account if there is a legitimate link between your organisations  
Or
- Contact the organisation that has declared the link to resolve the dispute and update MedCo accordingly.

### 2.3. Date of registration

This is the date you first made your application to register with MedCo. The date is system generated.

### 2.4. Date of last amendment

This is the date of the last amendment you made to your MedCo registration details. The date is system generated.

### 2.5. ICO number

Information Commissioners Office number.

Enter the ICO number in full.

All users intending to register with MedCo are required to have a valid registration with the Information Commissioners Office (ICO).

In accordance with the Data Protection (Charges and Information) Regulation 2018, every organisation or sole trader who processes personal information and who determines the purpose of which personal data is processed (Data Controllers) is required to pay a data protection fee to the ICO, unless they are exempt.

As part of your registration with MedCo, we will ask you for a valid ICO number which we will verify with the ICO register for fee payers. If you do not have an ICO registration, you can find out how to register on the ICO website [www.ico.org.uk](http://www.ico.org.uk)

Please note that you must register yourself or organisation with MedCo as it is shown on the ICO register for fee payers.

If you believe you are exempt from registering with the ICO, please email [enquiries@medco.org.uk](mailto:enquiries@medco.org.uk) to provide an explanation of the exemption you are relying upon.

### 2.6. ICO disciplinary action

This box should be populated with 'Y' (yes) if you have any of the following actions against your organisation:

Enforcement notice  
Monetary penalty

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### Undertaking

MedCo may contact you for further details of the actions against you, what they are for and why they were applied to your organisation.

The outcome of the investigations will be taken into account during the processing of your application and depending on the outcome of the investigations your organisation may not be accepted to register or authorised to use the MedCo system.

#### 2.7. Post code coverage

This applies to Medical Reporting Organisations only.

If your organisation has national coverage (for the purposes of MedCo this is England and Wales) the 'Select All' option will ensure all postcodes within England and Wales are used for the purpose of a search.

If you have limited or smaller geographical coverage you can either 'Select All' and then remove individual postcodes by scrolling through the list and clicking on the postcode(s) that do not apply or you can simply scroll through the alphabetically listed postcodes and individually select those that are covered by your organisation.

You must make sure your post code coverage is accurate and up to date.

#### 2.8. Companies House registered / Companies House registration number

Enter your organisation Companies House registration number.

This information is used as a validation check to confirm you are registered and suitable to use the MedCo service.

#### 2.9. VAT number

Enter your organisation VAT number.

This information is used as a validation check to confirm you are registered and suitable to use the MedCo service.

#### 2.10. How many medical reports do you expect to submit annually?

This applies to Medical Reporting Organisations (MROs) only.

Enter the number of reports you expect to submit on an annual basis.

Read the 'MRO qualifying criteria' and confirm you can comply with '*Minimum only*' or '*All*' of the requirements.

There is link available to view the MRO qualifying criteria within application page or on the MedCo website.

#### 2.11. How many medico-legal experts are contracted to your panel?

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This applies to Medical Reporting Organisations (MROs) only.

Enter the number of experts you have contracted to your panel.

Read the 'MRO qualifying criteria' and confirm you can comply with '*Minimum only*' or '*All*' of the requirements.

There is link available to view the MRO qualifying criteria within application page or on the MedCo website.

### 3. Creating your Account

Once your application has been approved, you will be provided with your MedCo account ID and invited to create your MedCo account.

#### 3.1. Passwords

Passwords should be a minimum of 8 characters and include an upper-case letter, a lower-case letter, a number and a special character.

#### 3.2. Creating branches

This applies to authorised users only and is optional.

\*Please note that at present there is no functionality behind the branch structure to restrict views of searches.

Enables you access to MedCo to add branches and branch administrators for your organisation.

At branch level, you can set up an administrator to manage the branch account directly.

#### 3.3. Creating users

This applies to Authorised users and MROs

Enables you access to MedCo to add users and administrators for your organisation, either individually or by uploading via a CSV file. A user sample csv is available for download in the 'create users' screen.

Please note uploading a CSV file from a virtual location/machine is not supported.

At branch level, you can set up an administrator to create users from the branch account directly.

Users must be set up before your account can become fully operational.

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Primary and secondary contacts do not need to be set up as operational users. The primary/secondary contacts can do everything an operational user can do as well as acting as the administrator.

### 3.4. Upload medical specialists

This applies to MROs only and is mandatory.

Medical specialists on your panel must be uploaded before your account can become fully operational.

You can upload medical specialists individually or by bulk upload via a CSV file. A Medical Specialists Sample CSV is available for download in the 'Medical specialists' screen.

Primary, secondary and administrator users may upload medical specialists.

## 4. Payments

Payments apply to MROs and direct medical experts only.

It is not possible to complete the initial registration and pay the fee at the same time, as your application must be approved before payment is made.

Once your application has been approved, you will be provided with your MedCo account ID and invited to create your MedCo account.

You will also be required to pay an annual subscription fee. Details of the fee amount and how to make payment can be downloaded once you have accessed your account.

The invoice can be viewed electronically or printed for payment and will show the status of the invoice as outstanding.

Payment must be made by bank transfer. To avoid delays in processing your application please make sure you quote the invoice reference number in your bank transfer payment. (Please allow time for payments to clear banking processes and MedCo administration to be completed before your account is operational).

Once the payment has been processed, the status of the invoice will change to paid and you can print the invoice if required.

Renewal of the account is one year from when your account is operational. The renewal invoice will be issued in advance prior to the renewal date.

### 4.1. Fully operational status

Once the payment and due diligence process is complete, including acceptance of the user agreement, your account will be updated to the status of 'Operational' and you will have the appropriate access to the MedCo system.

### 5. Search

The search functionality will enable you to select either a MRO or direct medical expert to contact and give instructions for a medical report. The results will be based on the details you supply in the 'Create a MedCo case' screen. Each search result will have up to 7 options of MROs or direct medical experts to choose from.

If a direct medical expert only is required, additional search criteria is needed and will limit the results to direct medical experts only.

To create a MedCo case, login to your MedCo account and select the 'Manage MedCo cases' option from the menu.

Enter the search type of either MRO or direct medical expert. Screen shots of the search screens are attached as Appendix 1.

#### 5.1. Case reference number

Enter your own case number/reference. This should be unique within the organisation as this is how you identify the case in the future.

#### 5.2. Claimants postcode location

The post code options are:

Home  
Work  
Hospital  
Prison  
Temporary

This information is used to match the search to the location where the claimant would like the examination/consultation to take place.

The full post code should be entered against the corresponding option.

#### 5.3. Number of claimants

Enter the number of claimants who require an examination/consultation within the radius of the selected postcode.

Please note that multiple claimants from the same accident but at different addresses require a separate MedCo case.

##### 5.3.1. Additional claimants

It is possible to add a claimant to an existing open MedCo search either before or after you have made a selection. To add a claimant simply increase the Number of claimants requiring examination and press Update.

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Number of claimants requiring examination  
at this postcode

1

Update Number of Claimants

The maximum number of claimants that can be entered is 9.

It is not possible to add a claimant to a MedCo case if the medical expert or MRO has already provided case data for any claimant associated with the case.

### 5.4. Date of accident

Enter the date of the accident

### 5.5. Radius

Enter the distance the claimant is prepared to travel from the postcode address for the examination/consultation.

The minimum selection is 5 miles and the maximum is 30 miles. (As the crow flies).

### 5.6. Direct medical experts

Additional information is needed where a direct medical expert is required.

#### 5.6.1. Expert gender

Select from Male, Female or Either.

#### 5.6.2. Expert type

Select from

- GP/Doctor
- Consultant in Orthopaedic Surgery
- Physiotherapist
- Consultant in A&E medicine
- Any

### 5.7. Search results

Once the search criteria is complete and search has been executed, the search results screen will be displayed with the applicable details of MROs or medical experts and their contact details.

For direct medical experts only search results, there is a further option to view details of practicing addresses for the purposes of checking suitability.

Prior to making your selection, you can save the results page (click save) and refer to it at a later date by using your own reference number to identify and retrieve the search results. You must agree terms and conditions with a potential MRO or medical expert before selecting using the radio buttons as once you have clicked on a choice it cannot be changed.

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Once you have selected one of the options, the MedCo case reference ID is allocated to the case. You should make a note of this reference number. The status of the case will be updated to 'instructed'.

If you have carried out a search with multiple claimants, or you have added claimants to an existing search, you will receive a MedCo Case ID for each claimant. Assign one of the references to each claimant.

The MedCo case ID must be passed on to the MRO or medical expert as part of your instructions for a report.



Please note that MedCo does not automatically instruct the selected MRO or direct medical expert you must contact them direct using the contact details provided in the search.

### 5.8. Exceptions

#### 5.8.1. Further search

In instances where there are not 7 result options available e.g. a very remote postcode location, the system will give you the option to extend the radius incrementally up to a maximum radius of 30 miles. This will expand the search results to allow more choice. You will be required to re-enter the claimant's full postcode with each radius increase.

#### 5.8.2. Direct medical searches only

If a full complement of direct medical experts is available from the original search but are found to be unsuitable for one of the following reasons, the option for a MRO search is available.

- Unavailability of all returned
- Premises unsuitable
- No prison visits
- No home visits
- No direct medical experts cover the area

### 5.9. Case Search

Once you have a MedCo case ID, you can use your unique case reference number or the Medco case ID to locate the case on the MedCo system and view the instruction screen.

## 6. Case notification and data uploads

MROs and Direct Medical Experts only.

### 6.1. Case notification

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When an Authorised User indicates to MedCo that they intend to instruct you, the case reference(s) will appear in your Outstanding Cases screen. When you receive the formal instructions with the claimant details and MedCo case reference, it is important that you check your MedCo Cases to confirm that MedCo knows that the case has indeed been assigned to you. If the MedCo case reference is not in your list, you need to refer back to the instructing party to confirm MedCo case reference. If the case has been sent to you in error, you should not accept the instructions.

### 6.2. Case ready to upload

Once the report is completed, key information needs to be uploaded to the MedCo system. The information required to be uploaded can be found in the Data Validation Rules document published on the MedCo website at:

<http://www.medco.org.uk/core-documents-help/>

Login to your MedCo account and either upload the data manually via the user interface or via the bulk CSV method.

A complete set of data is required for each medical report before you start to manually upload data. It is not possible to add part of the data and save it for completion at a later date.

### 6.3. Manual data upload

Report data can be entered by DMEs or MROs manually.

Log on to your MedCo account and select Upload Medical Reports.

From the list of Outstanding Cases select the MedCo Case you wish to upload. Enter the Date of Report, GMC/HPC number (if report provided via a MRO), Date of Examination, and Time Spent with Claimant then select Add Injury Details. The following options are available:

#### 6.3.1. No injury occurred

If you select No Injury Occurred the system will populate all required data fields with the word "None". Press Save to confirm the details.

Please note it is not possible to amend or delete the details you have entered after you have saved the upload.

#### 6.3.2. Unable to diagnose

If you select Unable to Diagnose complete the required data fields relating to additional reports and additional treatment recommended. Press Save to confirm the details.

Please note it is not possible to amend or delete the details you have entered after you have saved the upload.

#### 6.3.3. Injury diagnosed

If you select Injury Diagnosed, chose the claimant injury diagnosis from the list and then complete the required data fields relating to the injury prognosis, additional report and additional treatment recommended.



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If there is more than 1 injury diagnosis, you must add injury details for each individual diagnosis.

Once you have completed all injury details, press Save to confirm the details.

Please note it is not possible to amend or delete the details you have entered after you have saved the upload.

### 6.4. CSV data bulk upload

Report data can be uploaded by DMEs or MROs via a CSV file.

A sample CSV file can be found in the list of documentation on the MedCo website using the link below:

<http://www.medco.org.uk/core-documents-help/>

Populate the CSV file with the report data and save it in a local folder on your computer.



If more than 1 injury is stated in column F (“Number of diagnoses”), data for each additional injury (diagnosis/treatment/prognosis information) must be provided in the subsequent columns across the CSV file. See the text contained in the sample CSV for more information.

To upload the CSV file, log in to your account and click on Upload medical reports.

Open the Bulk Case Uploads and select your previously saved CSV file using the browse button. Click on the Upload Cases button to submit your file.

Once submitted, the system will check and validate your data. If there are missing mandatory data in your submission you will be notified on the screen. Otherwise the file will go in to a queue to be processed overnight.

The successful upload will close the cases contained within the CSV file (status ‘Completed’ next to the file name). If there were data errors, the status will display ‘Completed (with errors)’ next to the file name. You will be able to download the file locally to view the nature of error(s). To see the error messages, you will need to scroll to the right of the file to see the error messages.

Once the data is submitted, a case cannot be accessed to view or edit. Please check the accuracy of the data before you submit the file for upload.



## 7. Related documents

Appendix 1 MRO and Direct Medical Expert search screens



### Medical Reporting Organisation Case

Case Details

Your Case Reference Number

Status New

Claimant PostCode

Claimant PostCode Address Type

Number of claimants requiring examination at this postcode

Date of Accident

Search Radius  Distance is in miles; Minimum - 5, Maximum - 30



### Direct Medical Expert Case

Case Details

Your Case Reference Number

Status New

Expert Speciality

Gender

Claimant PostCode

Claimant PostCode Address Type

Number of claimants requiring examination at this postcode

Date of Accident

Search Radius  Distance is in miles; Minimum - 5, Maximum - 30