



## How to:

# Manually upload case data and view closed cases

Date: 12 August 2020

Owner: MedCo Registration Solutions

# Introduction

All Direct Medical Experts (DMEs) and Medical Reporting Organisations (MROs) must upload case data in line with their obligations under the User Agreements.

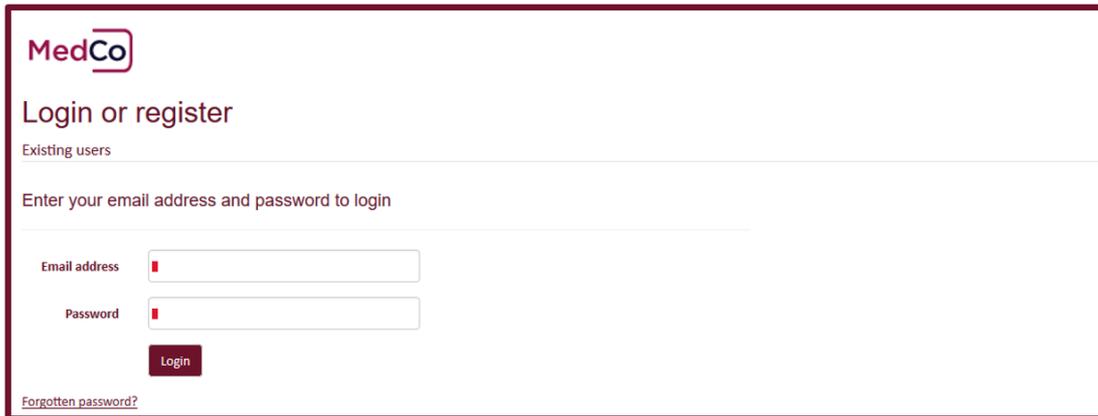
This document provides instructions on how to manually upload case data and how to view a closed case once data has been uploaded. It will describe

- How to locate a case
- How to enter the case data required and close the case.
- How to view a closed case.

# How to locate a MedCo case?

To locate a MedCo case to upload data follow the steps below.

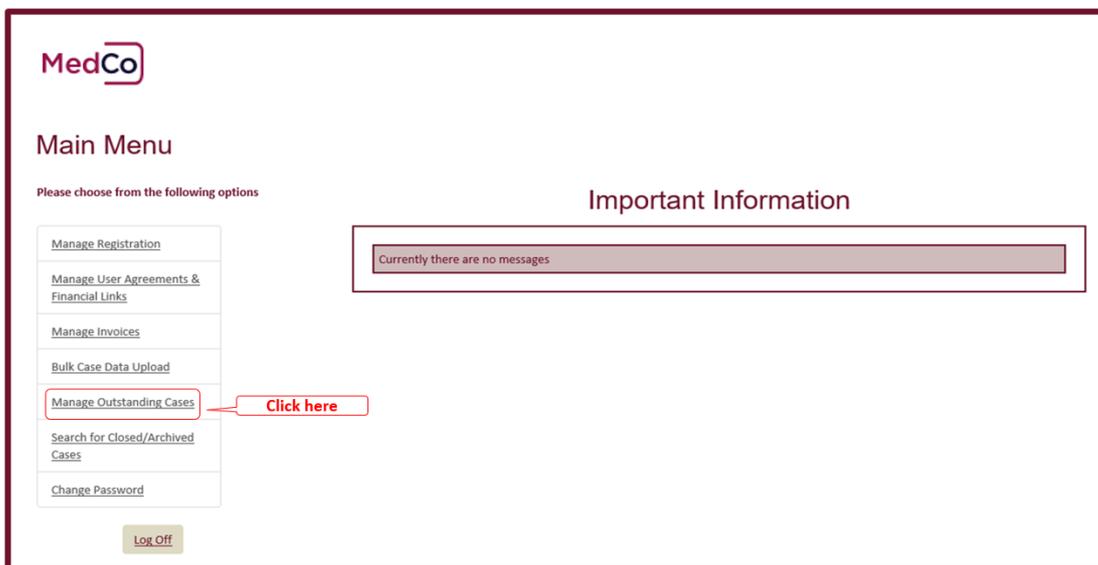
1. Log in to your MedCo account at <https://app.medco.org.uk/> See Figure 1



The screenshot shows the MedCo login page. At the top left is the MedCo logo. Below it is the heading "Login or register". Underneath, there is a section for "Existing users" and a prompt to "Enter your email address and password to login". There are two input fields: "Email address" and "Password", each with a red vertical bar on the left. Below the password field is a "Login" button. At the bottom left, there is a link for "Forgotten password?".

Figure 1

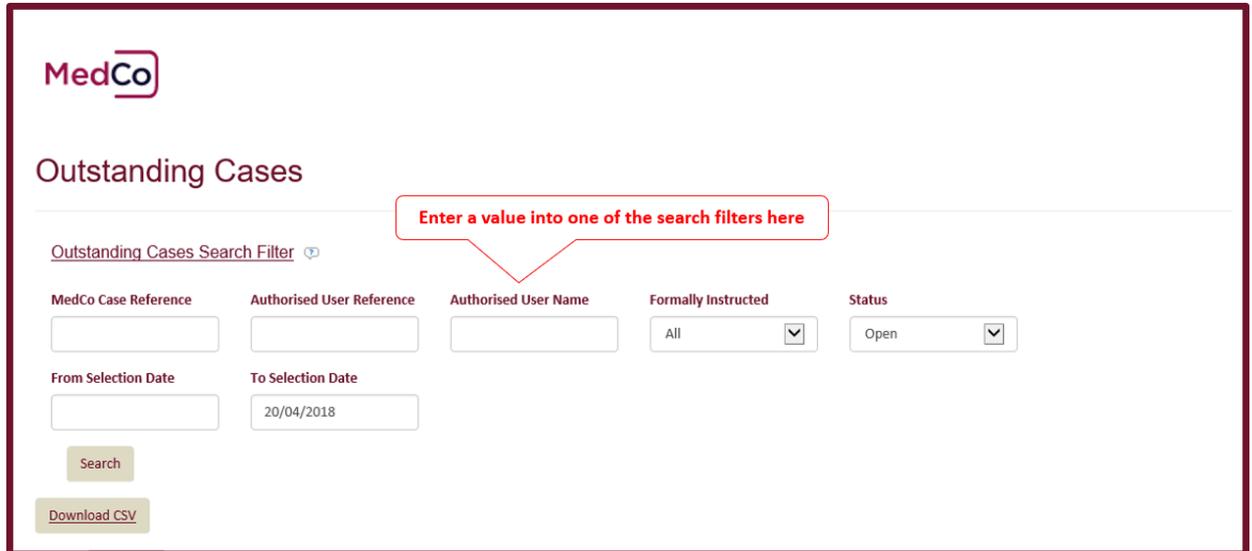
2. From the Main Menu click the option **Manage Outstanding** Cases. See Figure 2



The screenshot shows the MedCo Main Menu. At the top left is the MedCo logo. Below it is the heading "Main Menu". Underneath, there is a section for "Please choose from the following options" with a list of menu items: "Manage Registration", "Manage User Agreements & Financial Links", "Manage Invoices", "Bulk Case Data Upload", "Manage Outstanding Cases", "Search for Closed/Archived Cases", and "Change Password". The "Manage Outstanding Cases" item is highlighted with a red box and a red callout bubble that says "Click here". At the bottom left, there is a "Log Off" button. On the right side, there is a section for "Important Information" with a message box that says "Currently there are no messages".

Figure 2

- On the **Outstanding Cases** screen, there are 7 filters available for you to use in order to find a case or list of cases. If you know the MedCo case reference, enter its value in the **MedCo Case reference** field and click **Search**. See **Figure 3**



MedCo

## Outstanding Cases

Outstanding Cases Search Filter

MedCo Case Reference:

Authorised User Reference:

Authorised User Name:

Formally Instructed: All

Status: Open

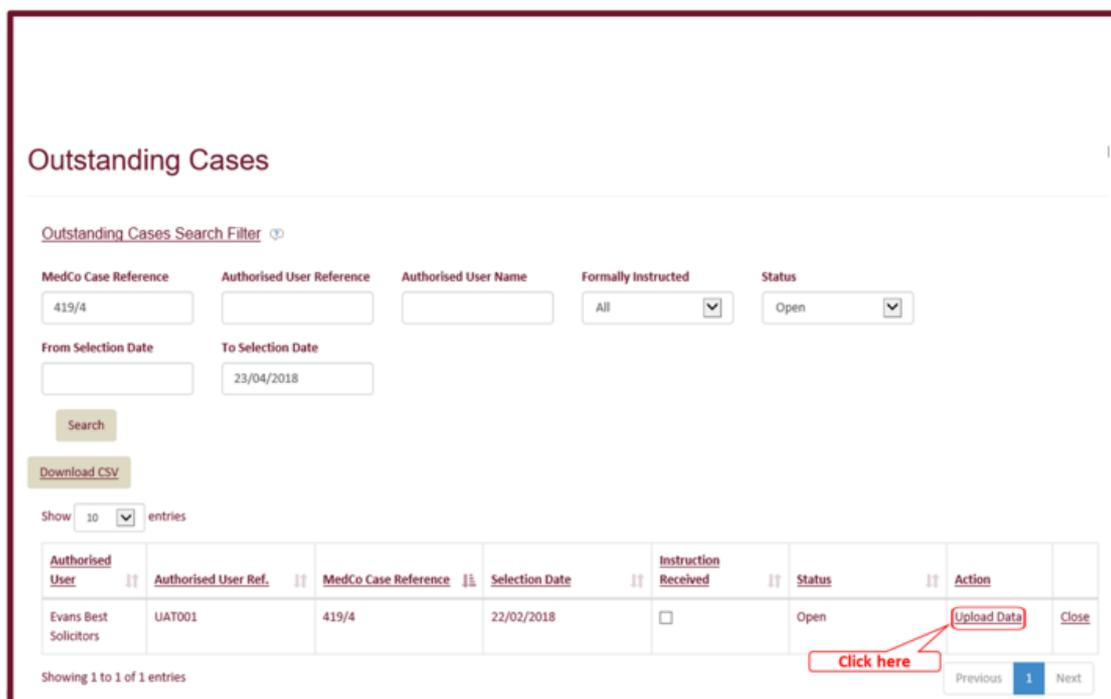
From Selection Date:

To Selection Date: 20/04/2018

Figure 3

**Note:** if you enter the MedCo case reference in the filter without the forward slash and the following number, the search will return all associated Medco reference numbers eg 419/1, 419/2, 419/3, 419/4 and 419/5.

- On the results page click **Upload data** to open the case. See **Figure 4**



## Outstanding Cases

Outstanding Cases Search Filter

MedCo Case Reference: 419/4

Authorised User Reference:

Authorised User Name:

Formally Instructed: All

Status: Open

From Selection Date:

To Selection Date: 23/04/2018

Show 10  entries

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

Showing 1 to 1 of 1 entries

Previous 1 Next

Figure 4

- This will show the **Case Details** screen. The view will depend on whether you are a DME or MRO.

The DME **Case Details** screen is shown in **Figure 5a** and automatically populates the **GMC/HCPC Number**.

The MRO **Case Details** screen is shown in **Figure 5b** and requires the user to enter the **GMC/HCPC Number** of the medical expert that carried out the examination.

DME View

### Case Details

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Authorised User Reference    UAT001  
MedCo Case Reference    419/3  
Date of Accident    22/11/2017  
Date of Report      
GMC/HCPC Number    1000060  
Date of Examination      
Was it a remote video examination?      
Time Spent With Claimant      
In minutes; minimum - 1, maximum - 999

Add Injury Details

Examination Outcome	Injury Diagnosis	Prognosis	Prognosis Duration (months)	Additional Report Recommended	Additional Treatment Recommended	Type of Additional Treatment

**Figure 5a**

MRO View

### Case Details

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Authorised User Reference    test3  
MedCo Case Reference    4921/1  
Date of Accident    02/08/2020  
Date of Report      
GMC/HCPC Number      
Date of Examination      
Was it a remote video examination?      
Time Spent With Claimant      
In minutes; minimum - 1, maximum - 999

Add Injury Details

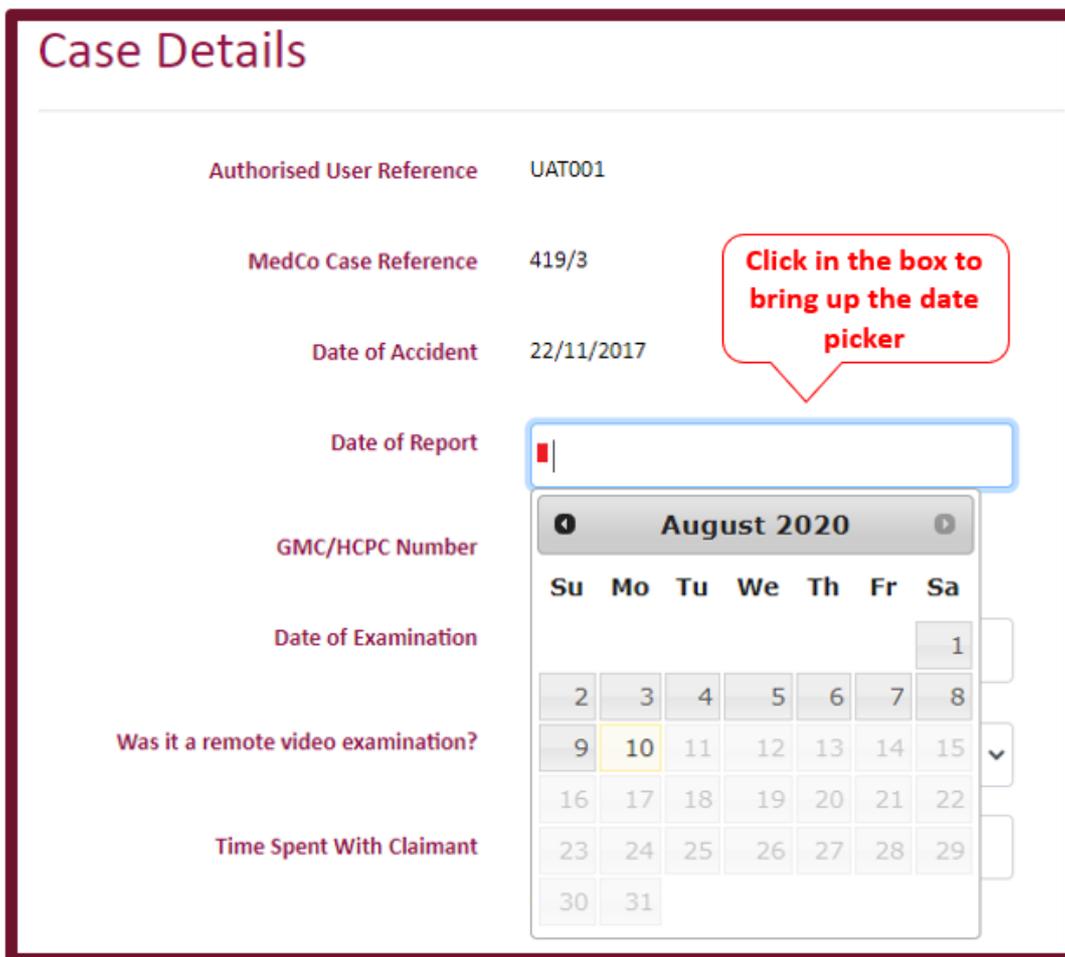
Examination Outcome	Injury Diagnosis	Prognosis	Prognosis Duration (months)	Additional Report Recommended	Additional Treatment Recommended	Type of Additional Treatment

**Figure 5b**

# How to enter the Case Data and Close the Case

**Important:** Before you start, check you are entering the correct case data by cross referencing the Authorised User Reference *and* Medco Case Reference on the MedCo system with the Medical report you are working from.

1. Enter the **Date of the Report** using either the date picker (that will appear as soon as you click in the box) or type the date manually following the format **DD/MM/YYYY**. See **Figure 6**



**Case Details**

Authorised User Reference	UAT001
MedCo Case Reference	419/3
Date of Accident	22/11/2017
Date of Report	<input type="text"/>
GMC/HCPC Number	
Date of Examination	
Was it a remote video examination?	
Time Spent With Claimant	

Click in the box to bring up the date picker

August 2020

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Figure 6

**Note:** the date of the report *cannot* be before the accident

2. **This step is for MROs Only** – Enter the **GMC/HCPC Number**. See **Figure 7**

### Case Details

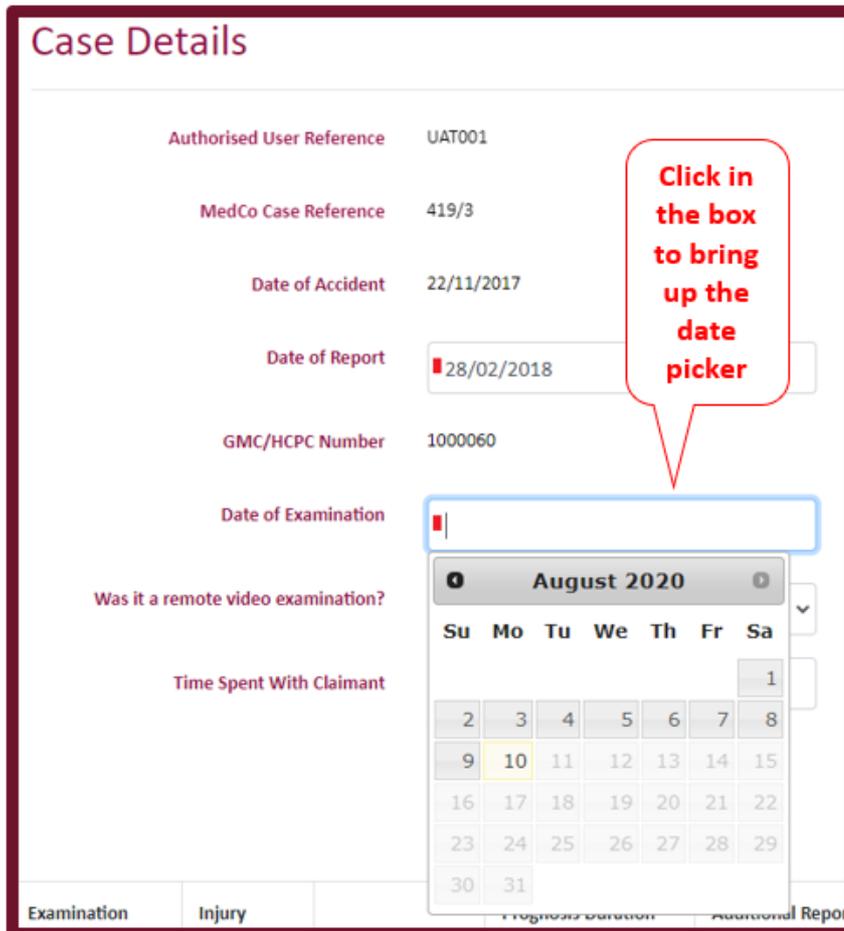
Authorised User Reference	test3
MedCo Case Reference	4921/1
Date of Accident	02/08/2020
Date of Report	<input type="text"/>
GMC/HCPC Number	<input type="text"/>
Date of Examination	<input type="text"/>
Was it a remote video examination?	<input type="text" value=""/>
Time Spent With Claimant	<input type="text"/>

*In minutes; minimum - 1, maximum - 999*



Figure 7

3. Enter the **Date of the Examination** using either the date picker (that will appear as soon as you click in the box) or type the date manually following the format **DD/MM/YYYY**. See **Figure 8**



The screenshot shows a 'Case Details' form with the following fields:

- Authorised User Reference: UAT001
- MedCo Case Reference: 419/3
- Date of Accident: 22/11/2017
- Date of Report: 28/02/2018
- GMC/HCPC Number: 1000060
- Date of Examination: (empty field with a date picker dropdown open)
- Was it a remote video examination? (checkbox)
- Time Spent With Claimant (input field)

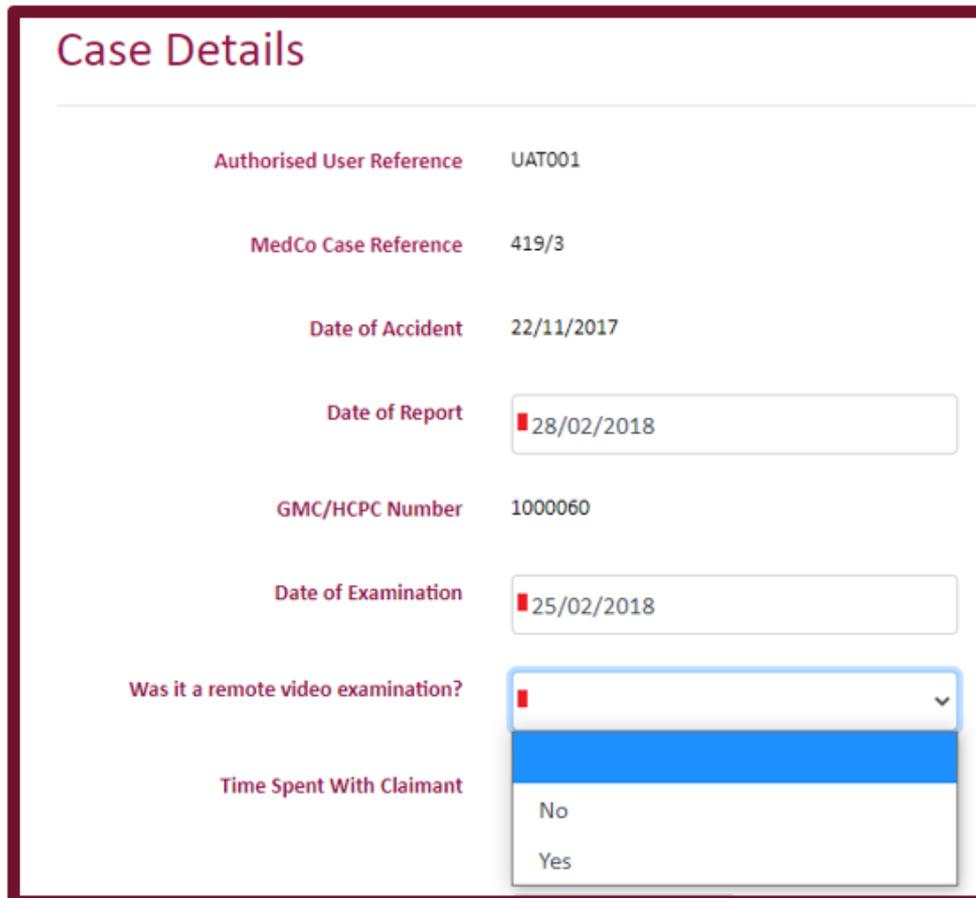
The date picker dropdown is open, showing a calendar for August 2020. A red callout box points to the date picker with the text: "Click in the box to bring up the date picker".

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Figure 8

**Note:** the date of examination *cannot* be before the accident or after the date of the report

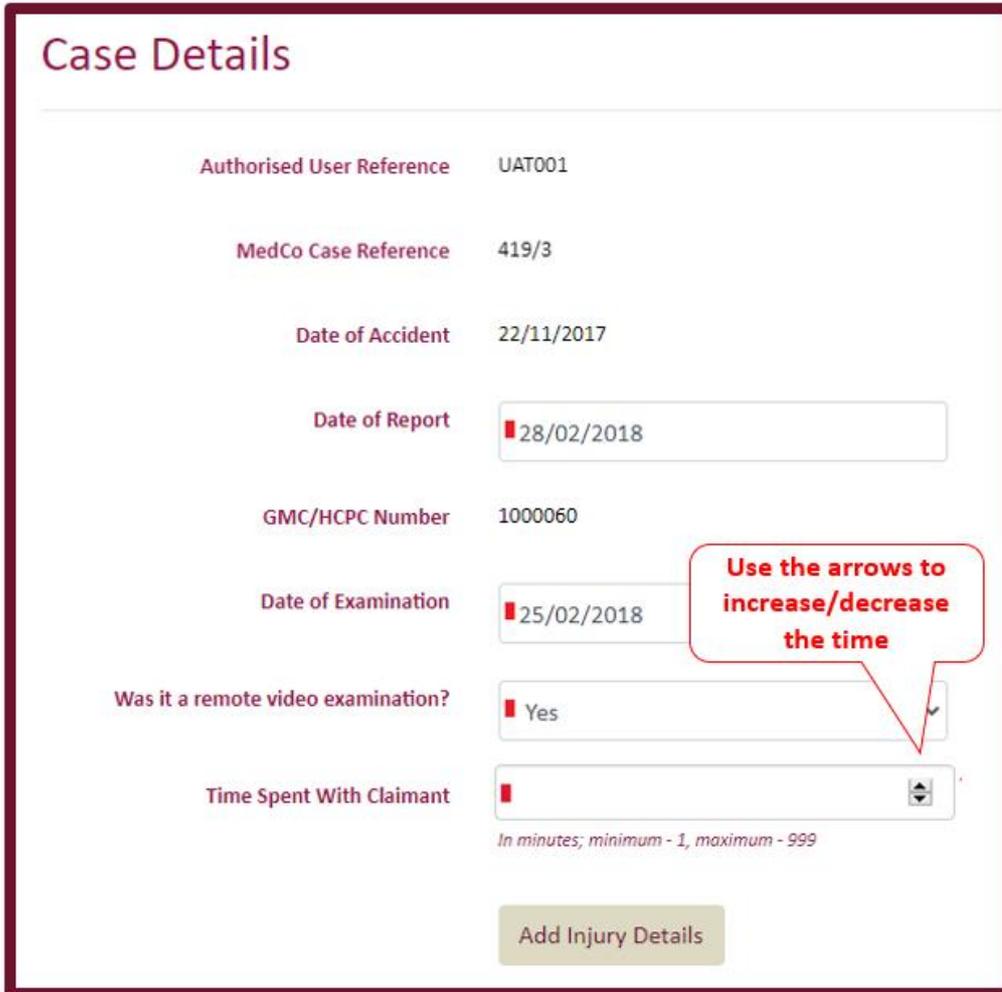
4. Select Yes or No to the question "Was it a remote video examination?". See **Figure 9**



Case Details	
Authorised User Reference	UAT001
MedCo Case Reference	419/3
Date of Accident	22/11/2017
Date of Report	28/02/2018
GMC/HCPC Number	1000060
Date of Examination	25/02/2018
Was it a remote video examination?	<input type="checkbox"/> No <input type="checkbox"/> Yes
Time Spent With Claimant	

Figure 9

5. Enter the **Time Spent with Claimant** in minutes by using the arrows in the box to select the minutes or manually type them in. See **Figure 10**



**Case Details**

Authorised User Reference	UAT001
MedCo Case Reference	419/3
Date of Accident	22/11/2017
Date of Report	<input type="text" value="28/02/2018"/>
GMC/HCPC Number	1000060
Date of Examination	<input type="text" value="25/02/2018"/>
Was it a remote video examination?	<input checked="" type="checkbox"/> Yes
Time Spent With Claimant	<input type="text" value=""/>

*In minutes; minimum - 1, maximum - 999*

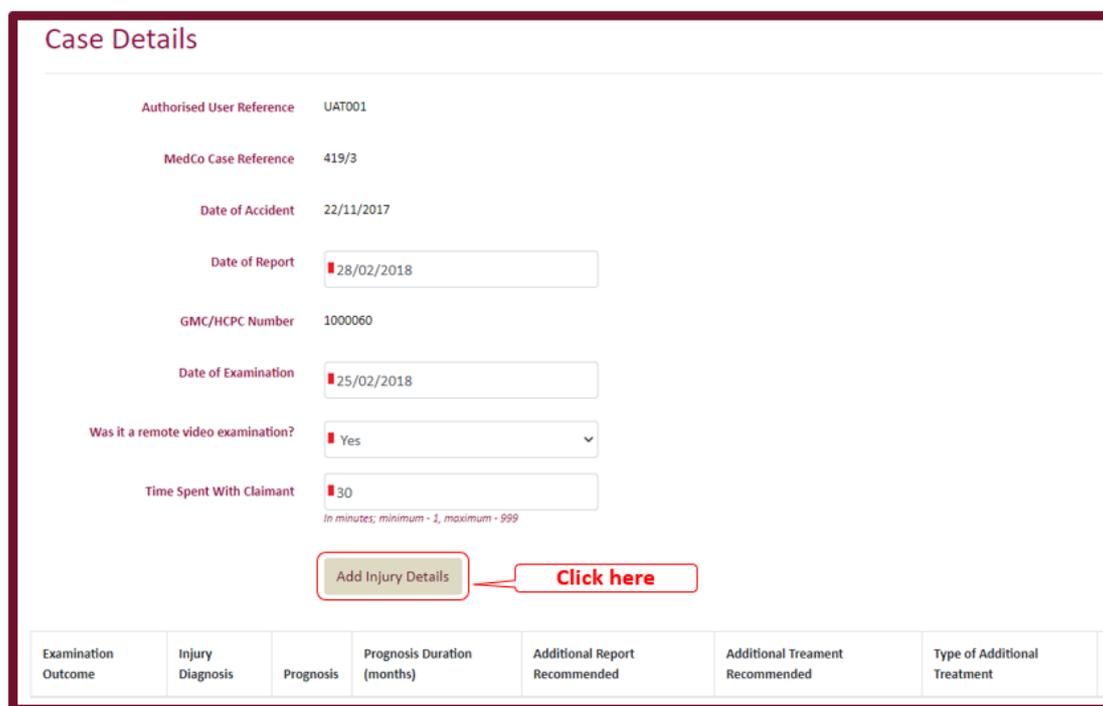
**Use the arrows to increase/decrease the time**

Figure 10

- Having completed the general information about the report and the examination, click **Add Injury Details** to complete the information about the injury. See **Figure 11**

### Important Notes:

- If there are multiple injury types (for example, **neck**, **back** and **shoulder**) this step needs to be completed for each injury type.
- Prognosis Durations must be entered from the Date of the Accident *and* must be the number of months in whole numbers.
- If the "**Claimant's Injury Diagnosis**" is of type "**Other**" then the "**Prognosis**" and "**Prognosis Duration**" fields will not appear.
- It is possible to add injury type multiple times.

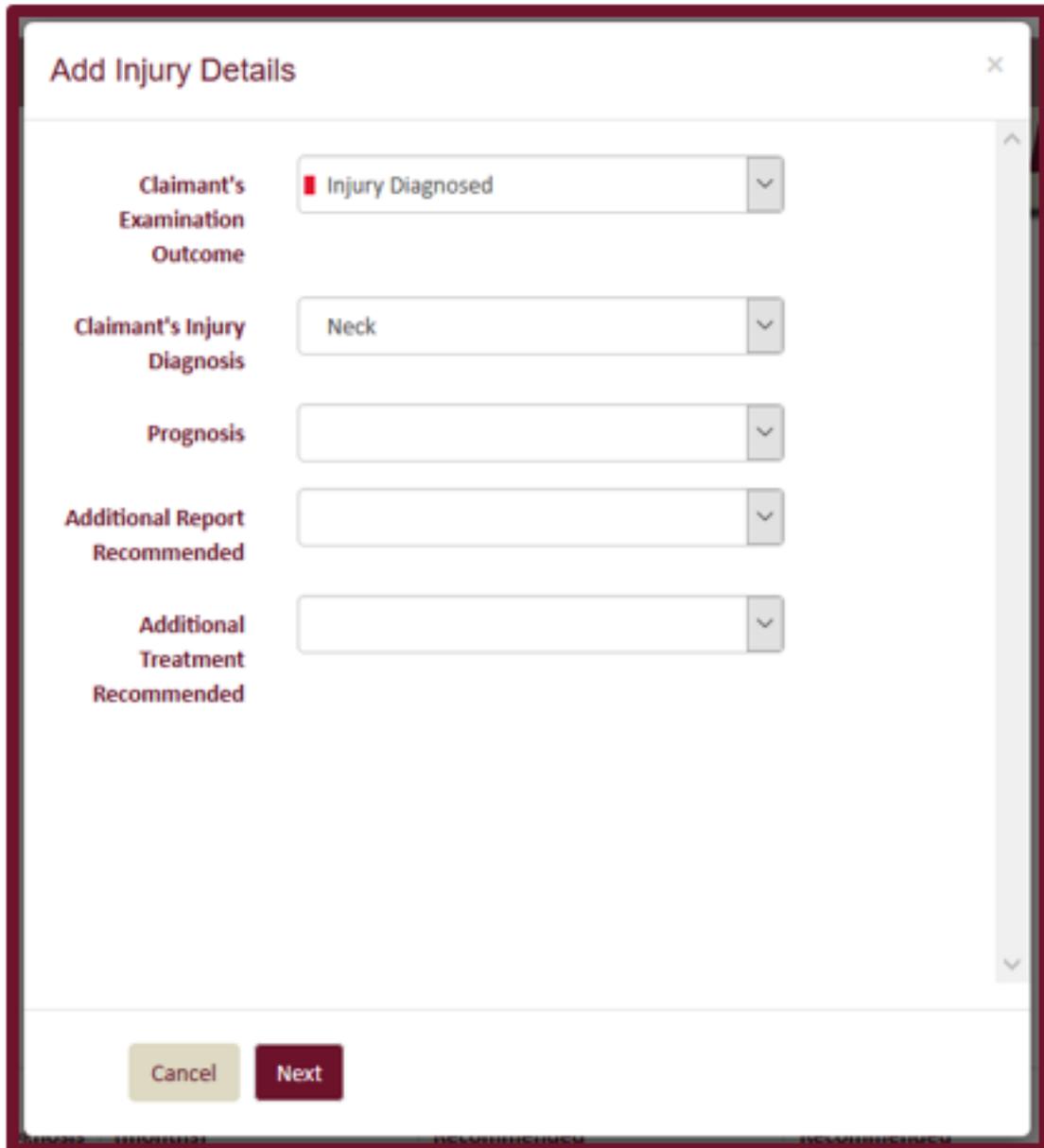


Examination Outcome	Injury Diagnosis	Prognosis	Prognosis Duration (months)	Additional Report Recommended	Additional Treatment Recommended	Type of Additional Treatment
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Figure 11

The remaining **Steps 7 – 15** below follows an example of entering case data showing a neck and back injury.

7. To add details of a neck injury, first select the **Claimant's Examination Outcome** *Injury Diagnosed* and in the **Claimant's Injury Diagnosis** select *neck*. See **Figure 12**



The screenshot shows a modal window titled "Add Injury Details" with a close button in the top right corner. The form contains the following fields:

- Claimant's Examination Outcome:** A dropdown menu with "Injury Diagnosed" selected.
- Claimant's Injury Diagnosis:** A dropdown menu with "Neck" selected.
- Prognosis:** An empty dropdown menu.
- Additional Report Recommended:** An empty dropdown menu.
- Additional Treatment Recommended:** An empty dropdown menu.

At the bottom of the form are two buttons: "Cancel" and "Next".

Figure 12

8. Complete the remaining information about the *neck* injury using the drop down boxes and press **Next** once complete. See **Figure 13**

**Note:** Prognosis Durations must be entered from the Date of the Accident *and* must be the number of months in whole numbers.

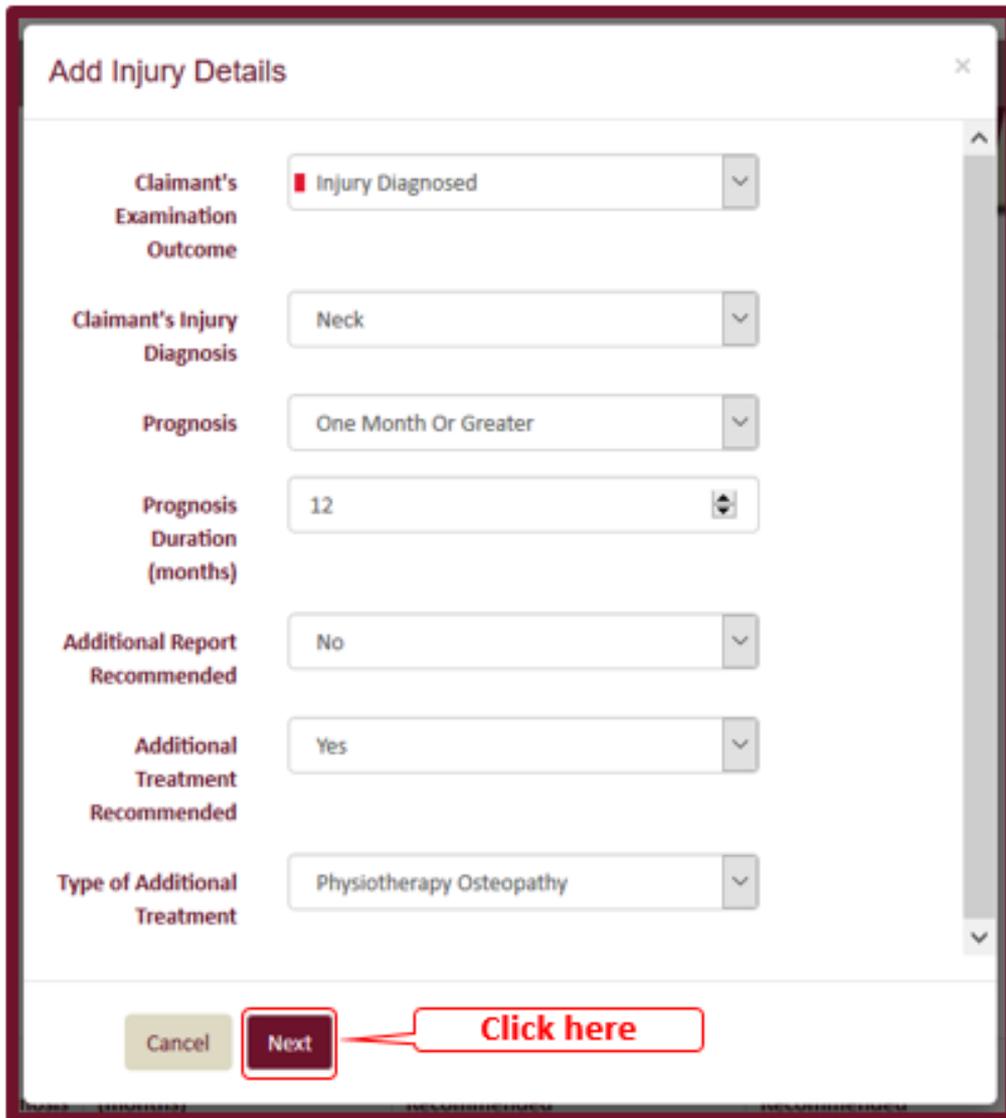


Figure 13

9. The *neck* injury details will now be displayed in the **Case Details** screen. See **Figure 14**

### Case Details

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**Authorised User Reference** UAT001  
**MedCo Case Reference** 419/3  
**Date of Accident** 22/11/2017  
**Date of Report**   
**GMC/HCPC Number** 1000060  
**Date of Examination**   
**Was it a remote video examination?**  ▼  
**Time Spent With Claimant**   
In minutes; minimum - 1, maximum - 999

[Add Injury Details](#)

Examination Outcome	Injury Diagnosis	Prognosis	Prognosis Duration (months)	Additional Report Recommended	Additional Treatment Recommended	Type of Additional Treatment		
Injury Diagnosed	Neck	One Month Or Greater	12	No	Yes	Physiotherapy Osteopathy	<a href="#">Amend</a>	<a href="#">Delete</a>

**Figure 14**

10. To add details of a *back* injury, click **Add Injury Details**. See **Figure 15**

### Case Details

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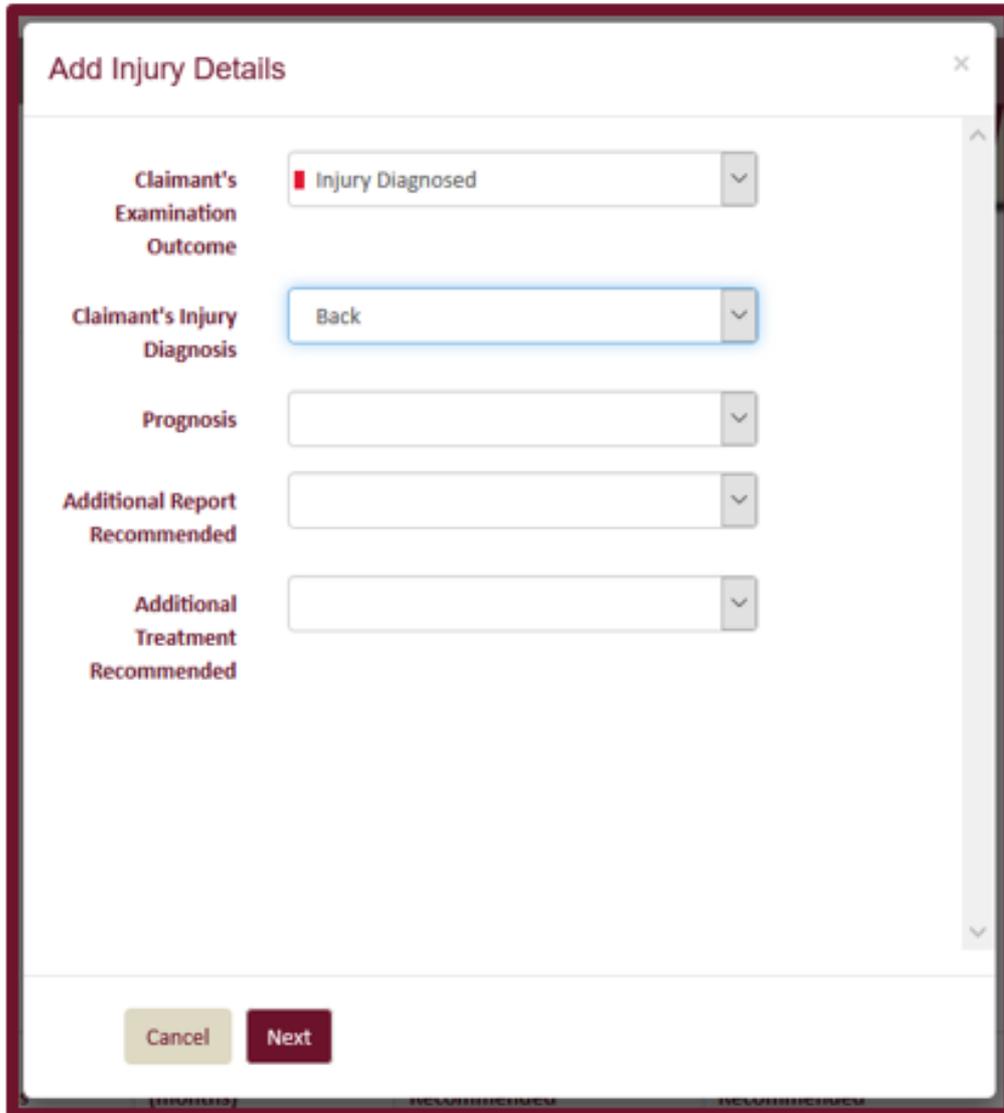
**Authorised User Reference** UAT001  
**MedCo Case Reference** 419/3  
**Date of Accident** 22/11/2017  
**Date of Report**   
**GMC/HCPC Number** 1000060  
**Date of Examination**   
**Was it a remote video examination?**  ▼  
**Time Spent With Claimant**   
In minutes; minimum - 1, maximum - 999

Add Injury Details
Click here

Examination Outcome	Injury Diagnosis	Prognosis	Prognosis Duration (months)	Additional Report Recommended	Additional Treatment Recommended	Type of Additional Treatment		
Injury Diagnosed	Neck	One Month Or Greater	12	No	Yes	Physiotherapy Osteopathy	<a href="#">Amend</a>	<a href="#">Delete</a>

**Figure 15**

11. Select the **Claimant's Examination Outcome** *Injury Diagnosed* and in the **Claimant's Injury Diagnosis** select *back*. See **Figure 16**



The screenshot shows a window titled "Add Injury Details" with a close button (X) in the top right corner. The form contains the following fields:

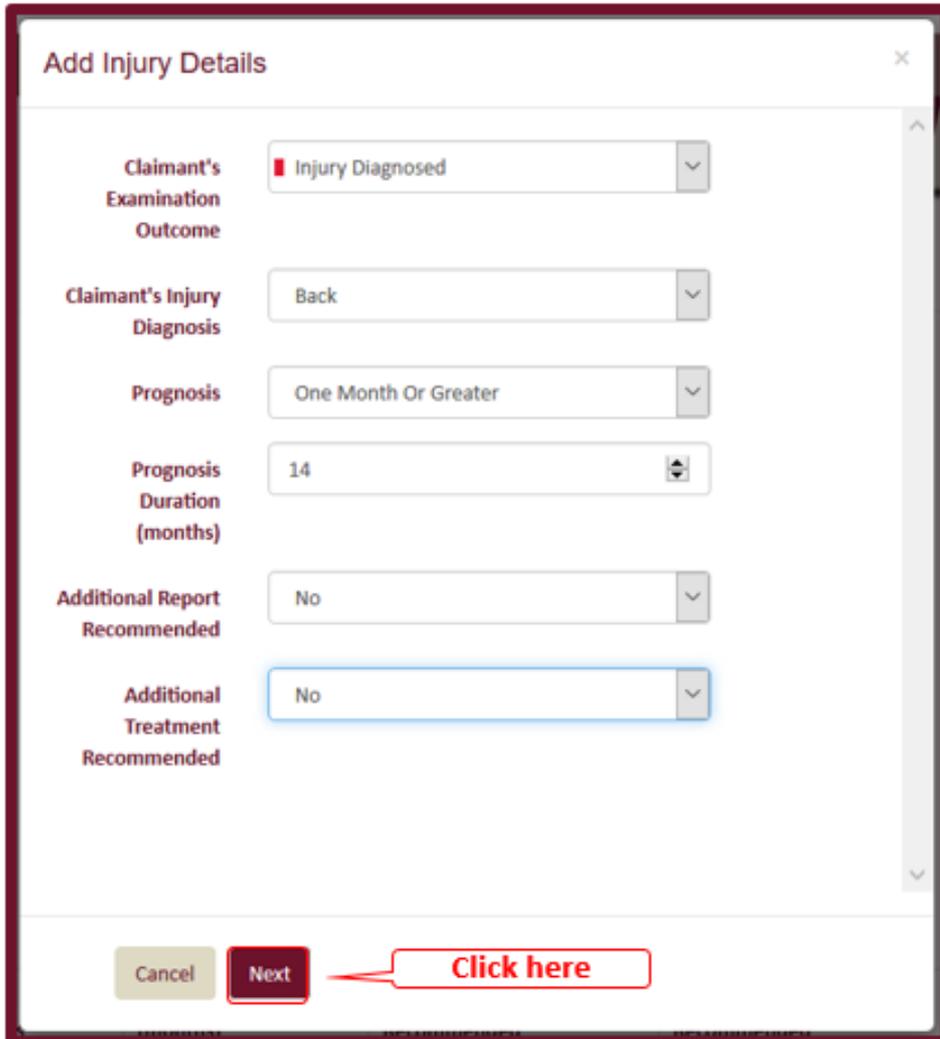
- Claimant's Examination Outcome:** A dropdown menu with "Injury Diagnosed" selected.
- Claimant's Injury Diagnosis:** A dropdown menu with "Back" selected.
- Prognosis:** An empty dropdown menu.
- Additional Report Recommended:** An empty dropdown menu.
- Additional Treatment Recommended:** An empty dropdown menu.

At the bottom of the form, there are two buttons: "Cancel" (light green) and "Next" (dark red).

Figure 16

12. Complete the remaining information about the *back* injury using the drop down boxes and press **Next** once complete. See **Figure 17**

**Remember:** Prognosis Durations must be entered from the Date of the Accident *and* must be the number of months in whole numbers.



**Add Injury Details**

Claimant's Examination Outcome: Injury Diagnosed

Claimant's Injury Diagnosis: Back

Prognosis: One Month Or Greater

Prognosis Duration (months): 14

Additional Report Recommended: No

Additional Treatment Recommended: No

Buttons: Cancel, Next (Click here)

Figure 17

13. The *back* injury details will now be displayed in the **Case Details** screen. See **Figure 18**

### Case Details

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Authorised User Reference: UAT001

MedCo Case Reference: 419/3

Date of Accident: 22/11/2017

Date of Report:

GMC/HCPC Number: 1000060

Date of Examination:

Was it a remote video examination?

Time Spent With Claimant:   
In minutes; minimum - 1, maximum - 999

[Add Injury Details](#)

Examination Outcome	Injury Diagnosis	Prognosis	Prognosis Duration (months)	Additional Report Recommended	Additional Treatment Recommended	Type of Additional Treatment		
Injury Diagnosed	Neck	One Month Or Greater	12	No	Yes	Physiotherapy Osteopathy	<a href="#">Amend</a>	<a href="#">Delete</a>
Injury Diagnosed	<span style="border: 1px solid red; padding: 2px;">Back</span>	One Month Or Greater	14	No	No	None	<a href="#">Amend</a>	<a href="#">Delete</a>

Figure 18

14. Once you have added all injury types and are happy the details are correct press **Save** at the bottom of the screen to complete the data. This will Close the case and remove it from your list of Outstanding cases. See **Figure 19**

**IMPORTANT: Please check the case data is complete and accurate *BEFORE* you press Save as it is not possible to delete or amend the data once Saved.**

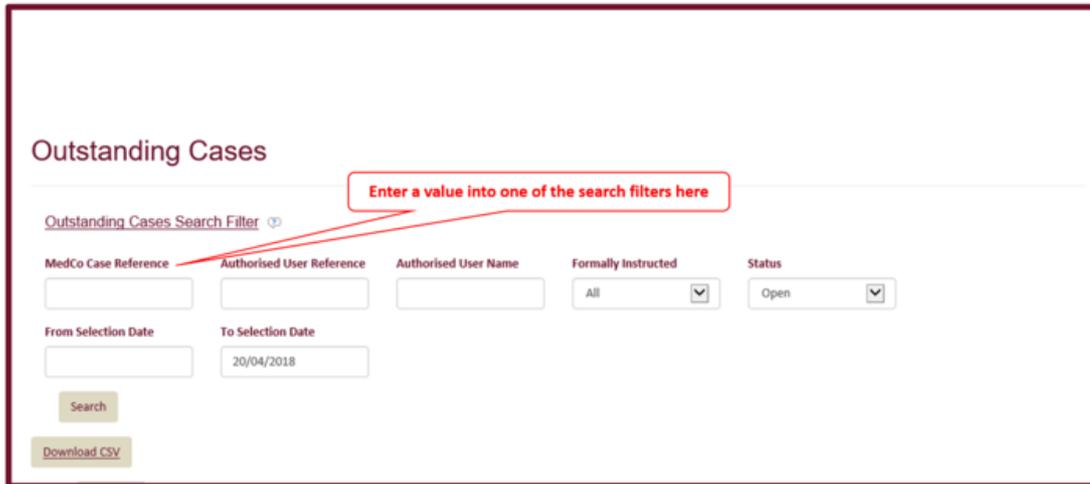
[Add Injury Details](#)

Examination Outcome	Injury Diagnosis	Prognosis	Prognosis Duration (months)	Additional Report Recommended	Additional Treatment Recommended	Type of Additional Treatment		
Injury Diagnosed	Neck	One Month Or Greater	12	No	Yes	Physiotherapy Osteopathy	<a href="#">Amend</a>	<a href="#">Delete</a>
Injury Diagnosed	Back	One Month Or Greater	14	No	No	None	<a href="#">Amend</a>	<a href="#">Delete</a>

[Return To Outstanding Cases List](#)
[Save](#)
Click here

Figure 19

15. Once you have Saved the case data the system will return to your list of outstanding cases where you can apply filter criteria to search for open cases. See **Figure 20**



**Outstanding Cases**

Outstanding Cases Search Filter ⌵

MedCo Case Reference  Authorised User Reference  Authorised User Name  Formally Instructed  Status

From Selection Date  To Selection Date

**Figure 20**

# How to view a Closed Case

Once you have added all injury types and pressed **Save** to complete the data, the case is Closed and is removed from your list of outstanding cases.

To view the information you have uploaded on a case follow the steps below.

1. From the Main Menu click the option **Search for Closed/Archived Cases**. See **Figure 21**

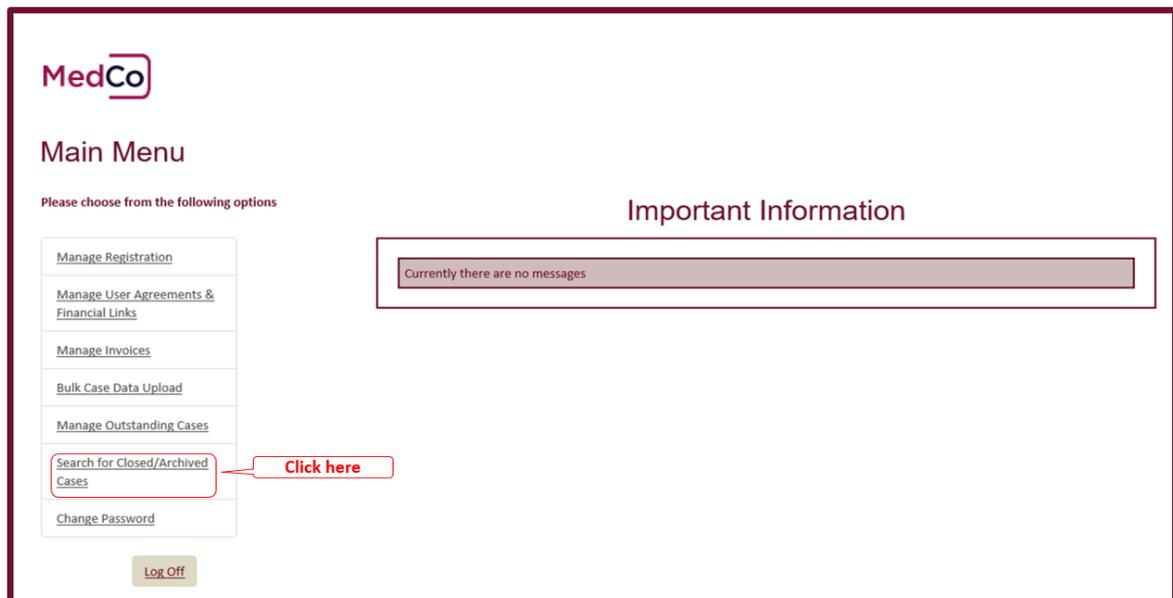


Figure 21

2. On the **Find MedCo Cases** screen enter the full Medco Case reference (including the forward slash and the following number e.g. **363/1**) in the box and press **Search**. See **Figure 22**

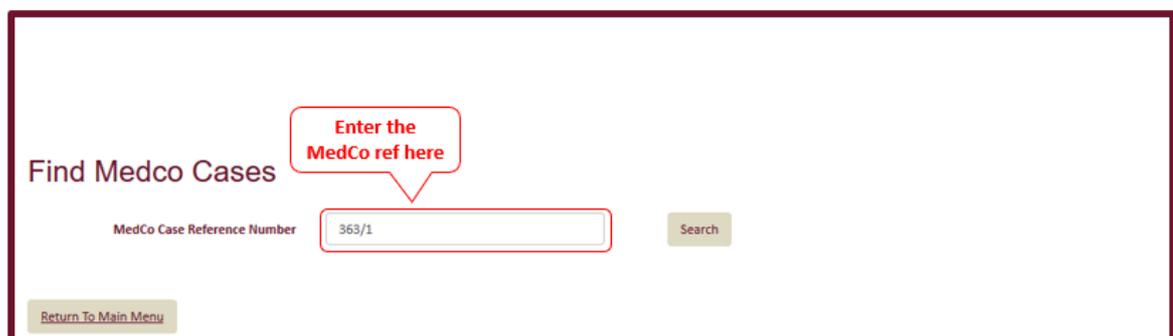
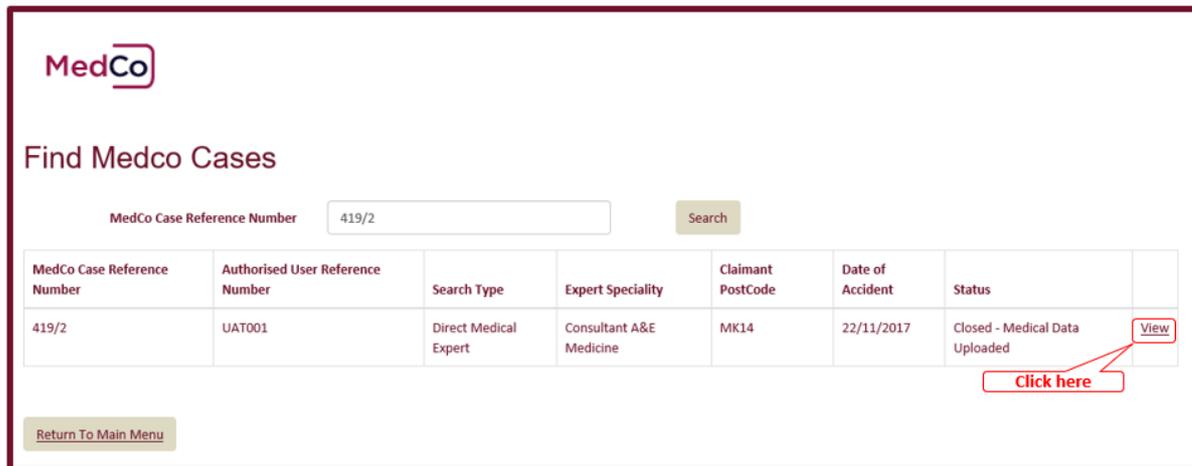


Figure 22

**Note:** if you enter the MedCo case reference in the Search box without the forward slash and the following number, the Search will return all associated Medco reference numbers eg 419/1, 419/2, 419/3, 419/4 and 419/5.

- On the Search results page click **View** to see the case data. See **Figure 23**



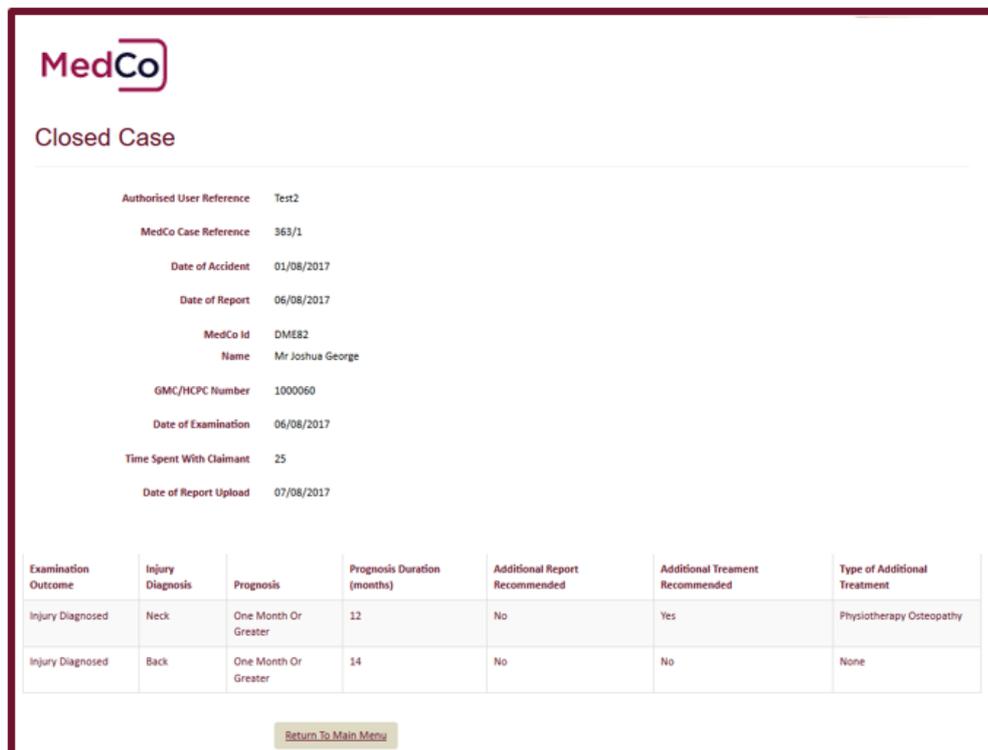
MedCo Case Reference Number: 419/2

MedCo Case Reference Number	Authorised User Reference Number	Search Type	Expert Speciality	Claimant PostCode	Date of Accident	Status	
419/2	UAT001	Direct Medical Expert	Consultant A&E Medicine	MK14	22/11/2017	Closed - Medical Data Uploaded	<a href="#">View</a>

[Return To Main Menu](#)

Figure 23

- The Closed Case data is displayed and is read only. See **Figure 24**



MedCo Case Reference: 363/1

Date of Accident: 01/08/2017

Date of Report: 06/08/2017

MedCo Id: DME82

Name: Mr Joshua George

GMC/HCPC Number: 1000060

Date of Examination: 06/08/2017

Time Spent With Claimant: 25

Date of Report Upload: 07/08/2017

Examination Outcome	Injury Diagnosis	Prognosis	Prognosis Duration (months)	Additional Report Recommended	Additional Treatment Recommended	Type of Additional Treatment
Injury Diagnosed	Neck	One Month Or Greater	12	No	Yes	Physiotherapy Osteopathy
Injury Diagnosed	Back	One Month Or Greater	14	No	No	None

[Return To Main Menu](#)

Figure 24