



# How to:

close cases (DMEs and MROs)

Date: 8 June 2024

Owner: MedCo Registration Solutions

# Introduction

In accordance with User Agreements, Direct Medical Experts (DMEs) and 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.

This document provides instructions on how to close a case for reasons other than uploading case data. DMEs / MROs 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
- Not a small claim injury

A DME / MRO can choose to **close a case manually** via the web or in bulk using the **CSV batch cancellation function**.

# How to manually close a case.

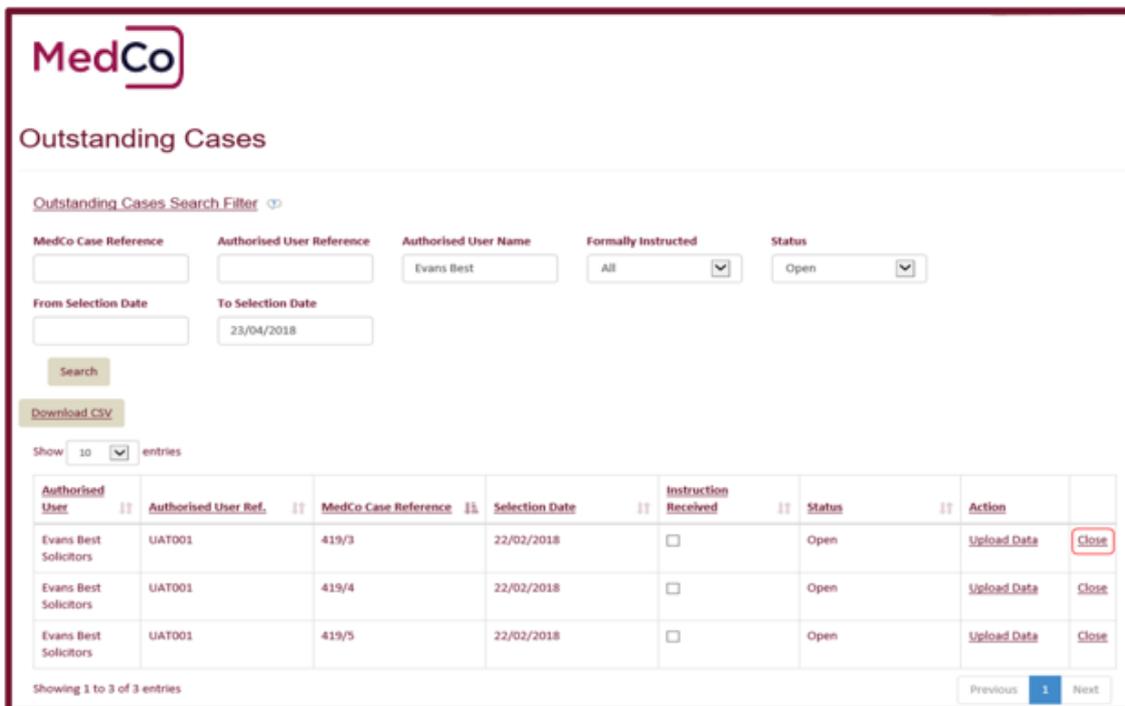
**Note:** Using this method you can only close one case at a time.

To close a case follow the steps below.

1. Log into your MedCo account
2. Select **Manage Outstanding Cases**
3. 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.

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



**Outstanding Cases Search Filter**

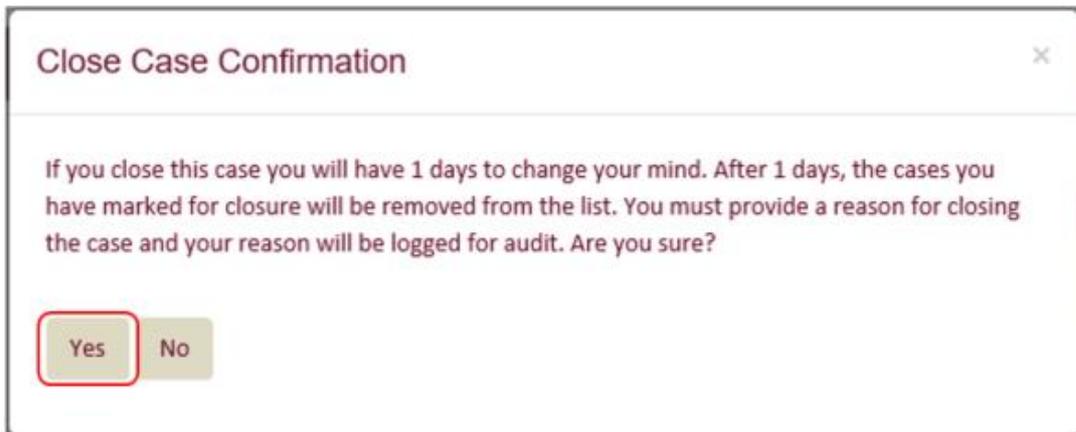
MedCo Case Reference:   
 Authorised User Reference:   
 Authorised User Name:   
 Formally Instructed:   
 Status:   
 From Selection Date:   
 To Selection Date:   
 Search   
 Download CSV   
 Show  entries

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"/>	Open	<a href="#">Upload Data</a> <a href="#">Close</a>
Evans Best Solicitors	UAT001	419/4	22/02/2018	<input type="checkbox"/>	Open	<a href="#">Upload Data</a> <a href="#">Close</a>
Evans Best Solicitors	UAT001	419/5	22/02/2018	<input type="checkbox"/>	Open	<a href="#">Upload Data</a> <a href="#">Close</a>

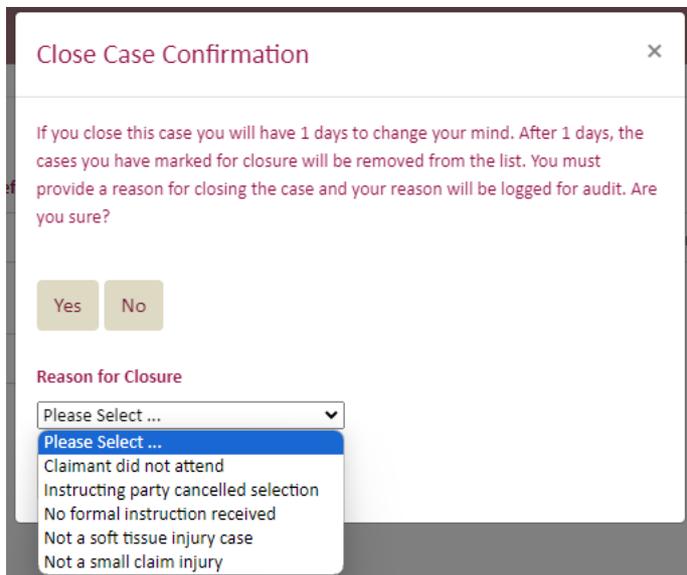
Showing 1 to 3 of 3 entries

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5. 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.



6. Select one of the **Reasons for Closure** from the dropdown list.



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

### 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**

No formal instruction received
▼

Save
Cancel

8. Having saved the Reason for Closure you are then returned to your list of search results on the Outstanding Cases screen.
9. 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  
evans best

Formally Instructed  
All ▼

Status  
All ▼

From Selection Date

To Selection Date  
23/04/2018

Search

Download CSV

Show 10 entries

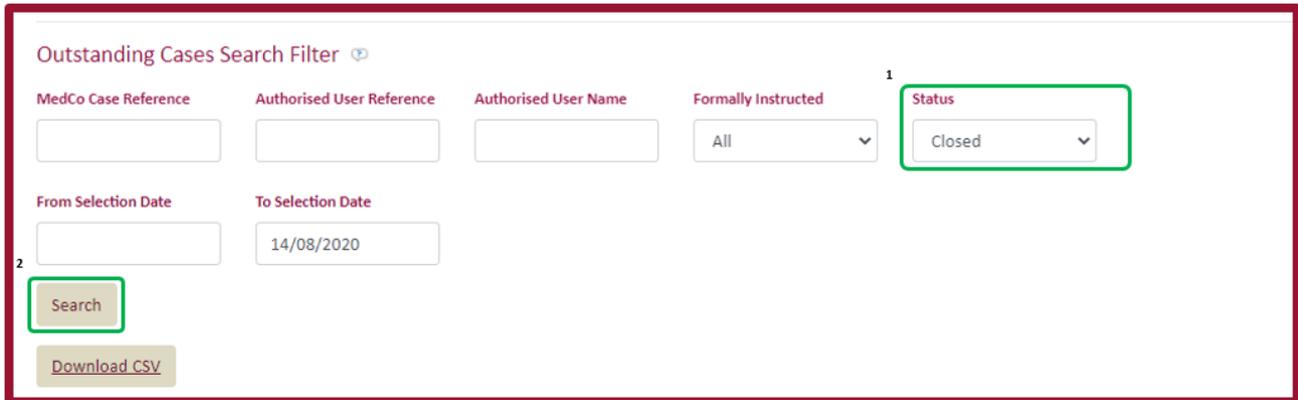
Authorised User	Authorised User Ref.	MedCo Case Reference	Selection Date	Instruction Received	Status	Action
Evans Best Solicitors	UAT001	419/3	22/02/2018	<input type="checkbox"/>	Closed No formal instruction received	<a href="#">Reopen</a>
Evans Best Solicitors	UAT001	419/4	22/02/2018	<input type="checkbox"/>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

Showing 1 to 3 of 3 entries

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**Note:** If you leave the **Outstanding Cases** screen immediately after manually closing a case,

or you refresh the screen, you will need to change the default **Open** setting in the **Status** filter to **Closed** or **All** in order to view the manually closed case and to re-open it. See example below.



Outstanding Cases Search Filter

MedCo Case Reference:

Authorised User Reference:

Authorised User Name:

Formally Instructed: All

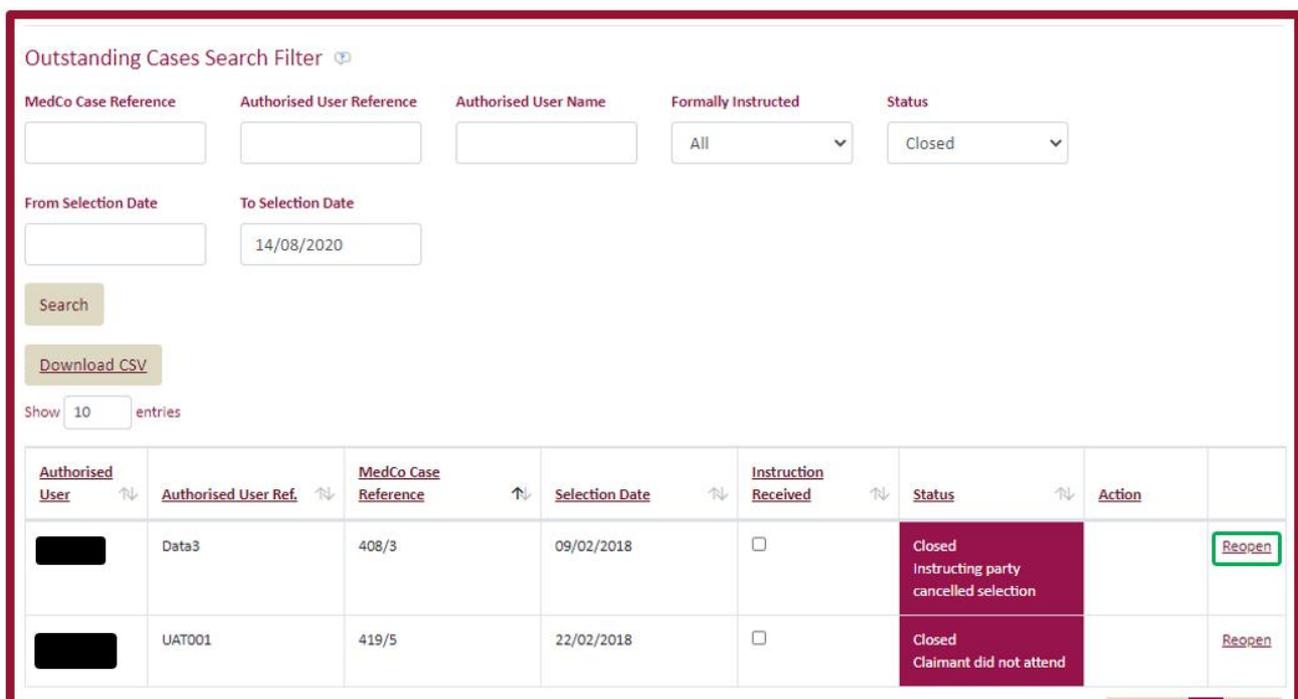
Status: Closed

From Selection Date:

To Selection Date: 14/08/2020

Search

Download CSV



Outstanding Cases Search Filter

MedCo Case Reference:

Authorised User Reference:

Authorised User Name:

Formally Instructed: All

Status: Closed

From Selection Date:

To Selection Date: 14/08/2020

Search

Download CSV

Show 10 entries

Authorised User	Authorised User Ref.	MedCo Case Reference	Selection Date	Instruction Received	Status	Action
[Redacted]	Data3	408/3	09/02/2018	<input type="checkbox"/>	Closed Instructing party cancelled selection	Reopen
[Redacted]	UAT001	419/5	22/02/2018	<input type="checkbox"/>	Closed Claimant did not attend	Reopen

8. After the set number of days, if the case is not reopened it will be permanently removed from your list of outstanding cases and will no longer appear in a search result.
9. To view closed cases that have been permanently removed from your list use the **Search for Closed/Archived Cases** function on the main menu.

# How to close a case using the CSV file.

To close many cases at once using the CSV case cancellation function follow the steps below.

1. Log into your MedCo account
2. Select the **Bulk Case Data Upload** option.
3. Click to download the **Cases Cancellation Sample CSV** file and save it on your device.
4. Open the CSV template and complete the required fields.
  - **Row A** Must be a MedCo case allocated to the DME/MRO ie 1234567/1
  - **Row B** If using case closure reason 1, 2 or 3 this must be the professional ID of the expert allocated to the case
  - **Row C** Must be the date the file is uploaded to the MedCo system
  - **Row D** Must be one of the 5 reason codes below
    - **1 - Claimant did not attend**
    - **2 - Not a soft tissue injury case**
    - **3 - Not a small claim injury**
    - **4 - No formal instruction received**
    - **5 - Instructing party cancelled selection**

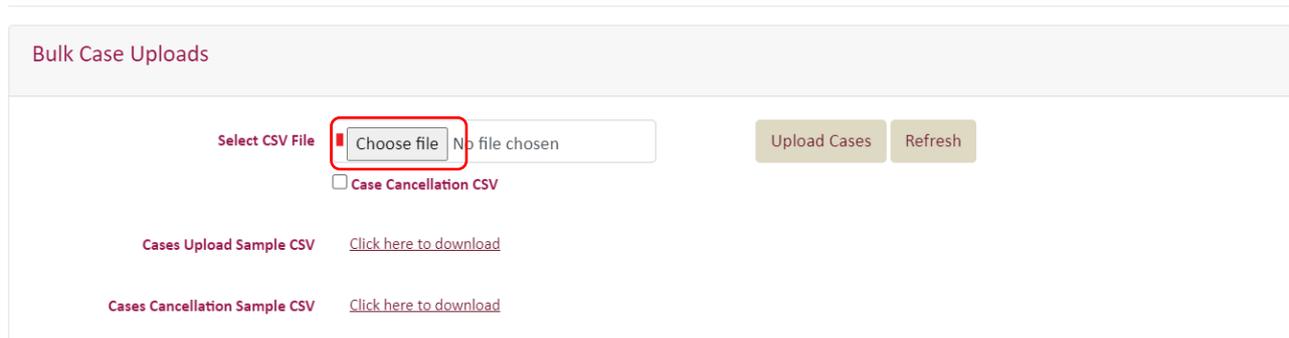
An example of a completed CSV file is shown below. Note: this file shows Row B with a date of 17 May 2024 therefore this file would need to be uploaded on the 17 May 2024.

	A	B	C	D	E	F
1	34041/1	1100219	17/05/2024	1		
2	34041/2	1100219	17/05/2024	2		
3	34041/3	1100219	17/05/2024	3		
4	34041/4		17/05/2024	4		
5	34041/5		17/05/2024	5		
6						

5. Save the completed CSV template to your device.

- Next, upload the CSV file by selecting **Choose file**. This will open your device file manager to locate the file.

## Medical Reports Upload



Bulk Case Uploads

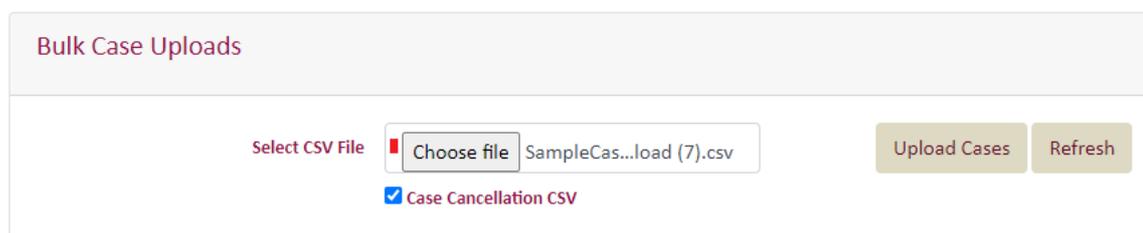
Select CSV File  No file chosen

Case Cancellation CSV

Cases Upload Sample CSV [Click here to download](#)

Cases Cancellation Sample CSV [Click here to download](#)

- Once the selected file is showing in the Choose file box, **you must select the tick box Case Cancellation CSV** and then press **Upload Cases**.

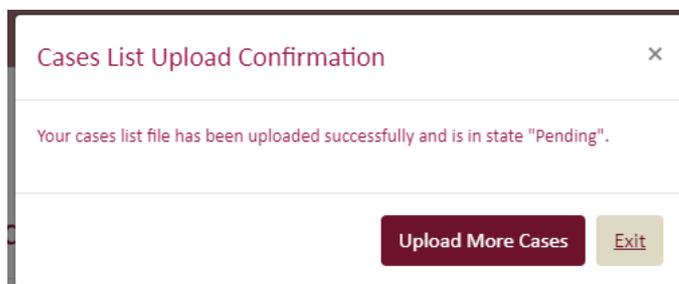


Bulk Case Uploads

Select CSV File  SampleCas...load (7).csv

Case Cancellation CSV

- If your file is successful and has no errors, it will be accepted and you will receive a confirmation message.



Cases List Upload Confirmation ×

Your cases list file has been uploaded successfully and is in state "Pending".

9. The successful CSV Bulk cancellation file will be assigned an Identification number and will appear in the list of files showing as **Pending**. It will be marked as a Cancellation CSV file in the table.

Id	Upload Date	File Name	Cancellation CSV	Uploaded Cases	Status
202	10/05/2024 13:48	SampleCasesCancellationUpload (7)10052024134841.csv	Yes	5	Pending

**Note: Batch Case Cancellations files will be processed over night.**

## Successful CSV Upload

10. If the CSV case cancellation file has been processed successfully, the Status of the file will change to **Completed** and there is no more action to take.

Id	Upload Date	File Name	Cancellation CSV	Uploaded Cases	Status
204	17/05/2024 13:24	SampleCasesCancellationUpload (8) - Copy17052024132449.csv	Yes	5	Completed

11. The cases that have been closed will be available for a set number of days during which time you are able to reopen them if the circumstances have changed. To view cases that can be reopened, select Manage outstanding cases and change the status in the Cases search to ALL or Closed. See example below.

### Outstanding Cases

Outstanding Cases Search Filter

MedCo Case Reference:  Authorised User Reference:  Authorised User Name: evans best Formally Instructed: All  Status: All

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	419/3	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

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- 12. After the set number of days, if the case is not reopened it will be permanently removed from your list of outstanding cases and will no longer appear in a search result.
- 13. To view closed cases that have been permanently removed from your list use the **Search for Closed/Archived Cases** function on the main menu.

## Unsuccessful CSV Upload

- 14. If the CSV case cancellation file contains errors, the status will show as **CompletedWithErrors**.

You will need to download the file to view the errors and resubmit a new CSV file to try again.

- 15. To view the errors, select **Download** against the file CompletedWithErrors and open the file from your device.



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[Log Off](#)

### Medical Reports Upload

**Bulk Case Uploads**

Select CSV File  No file chosen

Case Cancellation CSV

Cases Upload Sample CSV [Click here to download](#)

Cases Cancellation Sample CSV [Click here to download](#)

Show  entries Search:

Id	Upload Date	File Name	Cancellation CSV	Uploaded Cases	Status	
202	10/05/2024 13:48	SampleCasesCancellationUpload (7)10052024134841.csv	Yes	5	CompletedWithErrors	<a href="#">Download</a>
132	13/09/2018 11:25	SampleCasesUpload(1)13092018112532.csv	No	5	CompletedWithErrors	<a href="#">Download</a>

Showing 1 to 2 of 2 entries

- 16. Errors will be displayed in Row E against each case that did not upload.

	A	B	C	D	E	F	G	H	I	J	K
1	34041/1	1100219	06/02/2024	1	[Date of closure of case 34041/1 does not match date of upload.]						
2	34041/2	1100219	06/02/2024	2	[Date of closure of case 34041/2 does not match date of upload.]						
3	34041/3	1100219	06/02/2024	3	[Date of closure of case 34041/3 does not match date of upload.]						
4	34041/4		06/02/2024	4	[Date of closure of case 34041/4 does not match date of upload.]						
5	34041/5		06/02/2024	5	[Date of closure of case 34041/5 does not match date of upload.]						
6											

17. To close the failed cases, you can either manually close each one individually or you can create a new CSV file using steps 1 -7 above, making sure the errors are corrected.

## How to re-open cases

All 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:

1. 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.

2. 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:

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	<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?

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.