MedCo Data Validation Rules

Date: 8 June 2024

Owner: MedCo Registration Solutions

Author: MedCo Head of Operations

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 **This data is mandatory**
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
Postcode	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
Organisation User	Character	11	One of: **Operational, Admin**	**This data is mandatory**
Email address	Alphanumeric	256	Must contain @	User email address **This data is mandatory**
Title	Character	4	One of: **Dr, Mr, Mrs, Miss, Ms**	**This data is mandatory**
First name	Character	60		**This data is mandatory**
Last name	Character	60		**This data is mandatory**
Direct telephone	Numeric	20		**This data is mandatory**
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 (MROs 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
First name	Character	30		Medical expert's first name. **This data is mandatory**
Last name	Character	30		Medical expert's last name. **This data is mandatory**
Professional identifier	Alphanumeric	20		General Medical Council (GMC) number (or equivalent) / HCPC number. **This data is mandatory**

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 annonymised 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.

2.1.1   Upload in bulk via CSV file

A blank spreadsheet is required for csv bulk upload. This file can be created using an electronic spreadsheet program (for example Microsoft Excel or any other alternative available spreadsheet programs) and save with extension .csv A link to an example CSV can be found at 2.1.3 below

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	**MedCo case ID/n**	Alphanumeric (99999999/9)	10		Fill in the MedCo case ID: This is the information the instructing party must provide at the time of instruction. For example 123456/1. The **/n** indicates the number of claimants per case (up to a maximum of 9) **This data is mandatory**
B	**GMC / HCPC number**	Alphanumeric	20		General Medical Council (GMC) number (or equivalent) / HCPC number i.e. professional ID of the expert undertaking the examination **This data is mandatory**
C	**Date of report**	Date (DD/MM/YYYY)	10		Date the report was produced by the medical expert **This data is mandatory**
D	**Date of examination**	Date (DD/MM/YYYY)	10		• Date the claimant was examined by the medical expert. • Must be **after** the MedCo Case Instruction Date. **This data is mandatory**
E	**Time spent with claimant**	Numeric	3		Duration in minutes (1 to 999) **This data is mandatory**
F	**Remote exam**	Numeric	1	One of: **0, 1**	Specify if remote examination was carried out: • 0 for Yes, or • 1 for No **This data is mandatory**
G	**Number of Diagnoses**	Numeric	2	If **Unable to diagnose** or **No injury occurred**, enter value **1**	Specify the number of diagnoses as a result of the examination. • Enter 1 if 1 injury diagnosed, enter 2 if 2 injuries diagnosed; and so on. • Enter 1 if "Unable to diagnose" or if there was "No injury occurred" **This data is mandatory**

Column	Field name	Field attribute	Length	Value	Note
Columns H to N: are for entering information pertaining to <u>one injury</u>. Thus, if 3 injuries Neck, Back and Psychological have been diagnosed for the claimant in column **G** above, it is required to enter 3 groups of information <u>across the row</u>, as follows: • Columns H to column N: enter information for Neck injury • Columns O to column U: enter information for Back injury • Columns V to column AB: enter information for Psychological injury The way information should be entered for each injury in these columns are detailed below.					
H	**Claimant's Examination Outcome**	Numeric	1	One of: **0, 1, 2**	Outcome of the IP's examination. **This data is mandatory.** Enter **one** of the following: • 0 for Unable to diagnose • 1 for No injury occurred • 2 for Injury diagnosed Where there was **No injury occurred,** no further data is required i.e. then remaining columns should be left blank.
I	**Claimant's Injury Diagnosis**	Numeric	1	One of: **0, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10,11**	**If** an injury has been diagnosed, enter type of injury. **This data is mandatory.** • 0 for "Neck" • 1 for "Back" • 2 for "Shoulder injury" • 3 for injury type "Other" • 4 for "Psychological injury" • 5 for "Head" • 6 for "Chest" • 7 for "Wrist Hand" • 8 for "Ankle Foot" • 9 for "Arm/Elbow" • 10 for "Leg" • 11 for "senses" e.g. hearing, sight, taste, touch, smell
J	**Additional report**	Numeric	1	One of: **0, 1**	If an additional report/second opinion is required, enter: • 0 for Yes, or • 1 for No
K	**Additional treatment**	Numeric	1	One of: **0, 1, 2**	If an additional treatment is required, enter: • 0 for Yes, • 1 for No or • 2 for Treatment already in progress

Column	Field name	Field attribute	Length	Value	Note
L	**Type of additional treatment**	Numeric	1	One of: **0, 1, 2, 3, 4, 5, 6**	If an additional treatment is required or if treatment already in progress, enter the value that represents the type of treatment, as follows: • 0 for Medication treatment, • 1 for Physiotherapy/ Osteopathy • 2 for Other, enter 2 • 3 for X-ray/ MRI scans/ Ultrasound • 4 for Surgery • 5 for Cognitive Behavioural Therapy (CBT) • 6 for Combination of the above
M	**Prognosis**	Numeric	1	One of: **0, 1, 2, 3, 4**	Specify the prognosis for the injury, as follows: • 0 for duration less than one month • 1 for duration of one month or more. Then go to the next column **N** to specify the Prognosis duration • 2 for Guarded prognosis • 3 for Permanent prognosis • 4 for Unable to provide a prognosis However, if injury diagnosis is "Other" (value 3) in column **I**, this column should be left blank
N	**Prognosis duration**	Numeric	3		• Only provide a value for this column **if prognosis is "one month or more" in column M**, otherwise leave it blank. • Specify the prognosis duration for the injury in terms of months. For example, if the recovery requires 9 months, enter 9. **** Note:** Prognosis must be entered from the <u>date of the accident</u>.

2.1.2   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 uploades 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).

2.1.3   Example CSV

A Sample CSV Case Data Upload Form can be found in the Document Library on the MedCo website. Use the *Filter by category* to locate the Sample CSV Form. This template contains explanations for each column.

2.1.4   Error scenarios in CSV Case data upload

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/HCPC 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

2.1.5   Manual Case Data entry

Case Data can be entered for individual case via the manual method. This can be accessed via the option 'Manage MedCo Cases' from the Main Menu. From the list of "Outstanding Cases", clicking the 'Upload Data' link on any of the cases will prompt a 'Case Details' screen where user can enter all necessary data pertaining to the case, then Save to upload the report.

•   Once saved, the case will be removed from the Outstanding Cases list.
•   Once saved, the case will no longer be editable.

A guide showing users How to manually upload case data can be found in the How To Guide section of the MedCo website

https://www.medco.org.uk/how-to-guides/

2.2 Close case data (MROs 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, 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
• Not a small claim injury

A guide showing DME and MRO users How to close cases can be found in the How To Guide section of the MedCo website

https://www.medco.org.uk/how-to-guides/

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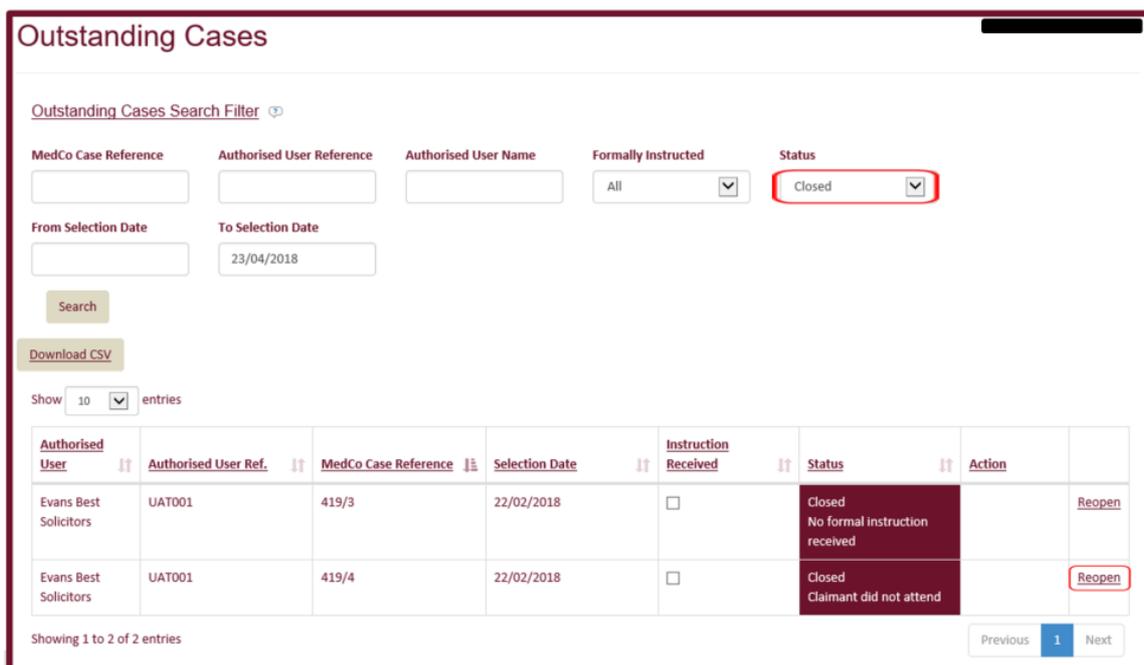
During this period they can be reopened it if the circumstances for the cases have changed.

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**.

3. 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
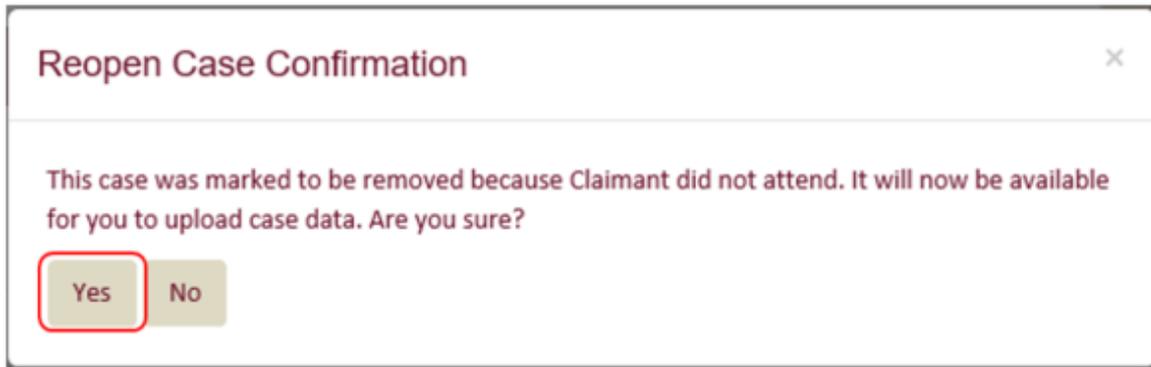
The case is now back in the open outstanding case list and can be marked formally instructed and it is possible to upload case data.