

### MedCo business process guide

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 compliance documentation that govern MedCo usage and daily operations

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## 1. Registrations

This guide covers all of 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 at this stage).

Your application will be processed by MedCo 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 website under Terms of Use > 'How will we use your personal data?'

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

Changes are logged in the chronology section within the application page and are date and time stamped by the system.

### 1.1.1. Email address

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

### 1.1.2. Registered Address

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

### 1.1.3. Name

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

### 1.1.4. Contacts

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

**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.

### 1.1.5. 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.

### 1.1.6. GMC/HCPC 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.

### 1.1.7. 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.

### 1.1.8. GMC/HCPC 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.

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

### 1.1.9. 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).

### 1.1.10. 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.

### 1.1.11. Practicing address

This applies to direct medical experts only.

Enter the addresses you regularly practice from. You can enter as many addresses as are applicable.

The full postcode of the practicing address is key information as this will form part of the criteria to match searches to experts.

### 1.1.12. 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.

### 1.1.13. 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.

### 1.1.14. Areas of expertise

This applies to Consultant Orthopaedic Surgeons registering as a 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.

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.

#### 1.1.14.1. Year in active clinical practice

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

### 1.1.15. Active

This applies to direct medical experts only.

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.

### 1.1.16. Organisation SRA number

This applies to solicitors only.

Enter the SRA number of the organisation in full.

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

### 1.1.17. 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.

### 1.1.18. MIB member

This applies to Insurers only.

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.

### 1.1.19. FCA number

Enter your FCA number.

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

### 1.2. General Details

#### 1.2.1. User agreement acceptance

To obtain full access to the system as an Authorised user, MRO 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.

#### 1.2.2. 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 1.2.2.2 Disputed Links).

#### Definition of a link:

##### 1.2.2.1. 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.

##### 1.2.2.2. Disputed Links

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.



### 1.2.3. Date of registration

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

### 1.2.4. Date of last amendment

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

### 1.2.5. Organisation ICO number

Information Commissioners Office number.

Enter the ICO number of the organisation in full.

This is used for validation to confirm you are registered to process personal data as required under the Data Protection Act and suitable to use the MedCo service.

### 1.2.6. 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
- 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.

### 1.2.7. Post code coverage

This applies to Medical Reporting Organisations and direct experts 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 returned in searches.

Individual postcodes can be de-selected by scrolling through from the dropdown list and clicking on and de-selecting the postcode that does not apply.

Limited and smaller geographical areas can be individually selected by scrolling through and clicking on the applicable postcodes covered by your organisation.

### 1.2.8. 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.

### 1.2.9. 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.

### 1.2.10. 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.

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

This applies to Medical Reporting Organisations (MROs) only.

Enter the number of experts you have uploaded to MedCo as members of 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.

## 1.3. 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.

### 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.

### 1.3.1. 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.

### 1.3.2. Creating users

#### 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. An example is available in the 'create user' 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.

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.

#### Direct medical experts

You can set up an administrator to create users, either individually or by uploading via a CSV file. An example is available in the 'create user' screen.

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

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.

## 2. 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 can 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 an email will confirm payment and provide a VAT receipt. The status of the invoice will change to paid.

Renewal of the account is one year from when your account is operational. The renewal invoice will be issued 3 months prior to the renewal date.

### 2.1. 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.

## 3. Search

**Detail to follow. Deadline 31/03/2015**

Include:

\*Definition details of what to put in the search criteria for example scenarios  
e.g. When searching for an expert. What do I do if my client lives in a remote rural location but works and wants to see an expert near their place of work in town?

## 4. Uploads

**Detail to follow. Deadline 30/04/2015**

Include:  
Report data uploads

### 5. Related documents

None.