

How to:

Manually close a case

Date: 05 June 2019

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

How to close a case?

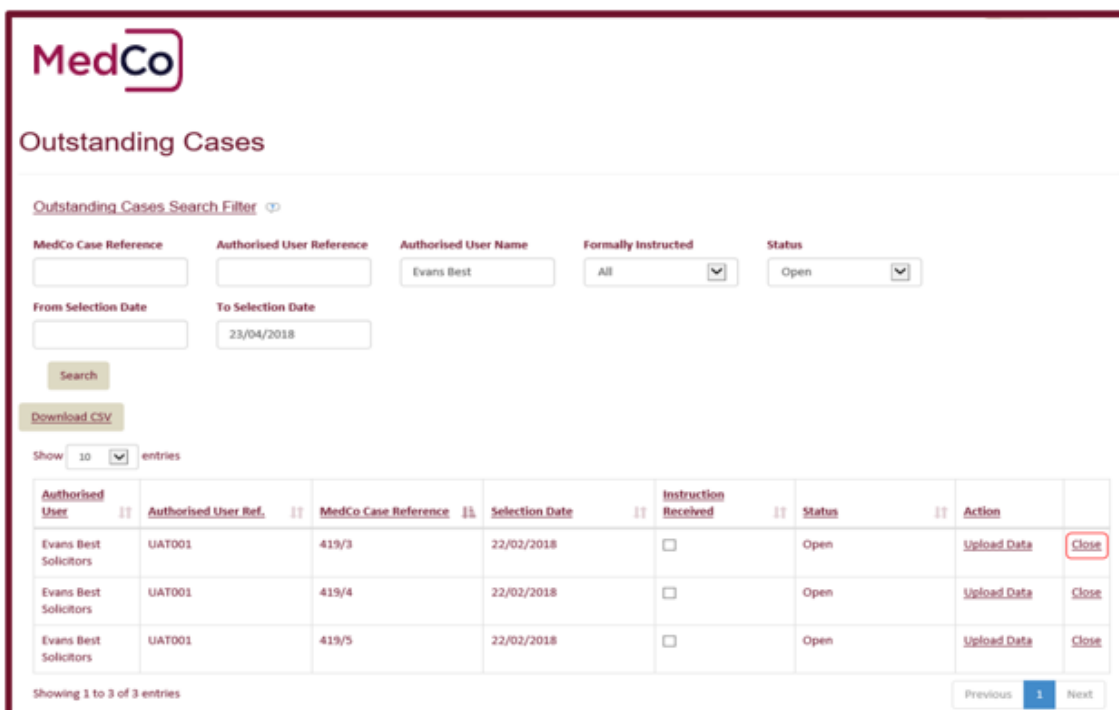
Note: You can only close one case at a time.

To close a case follow the steps below;

1. 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.

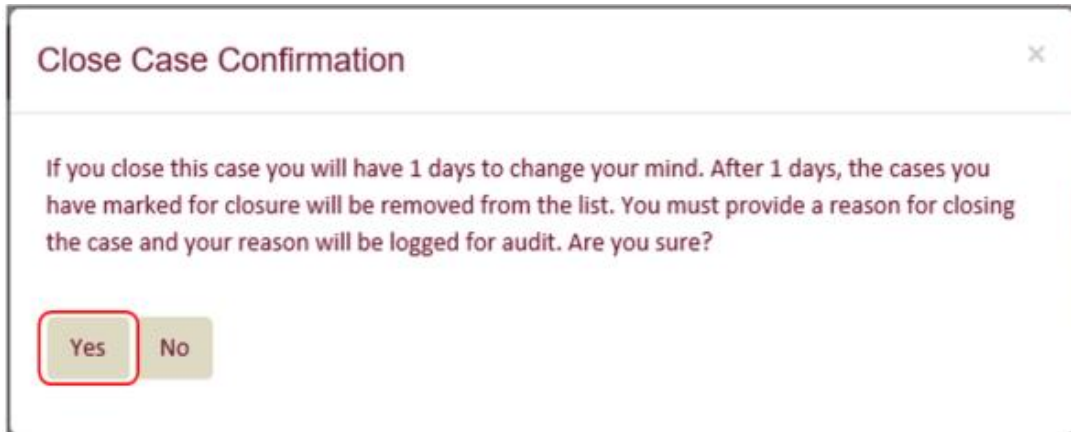
2. The tabulated results will have two Action columns: **Upload Data** and **Close**. Select Close for the case you wish to remove from the list.



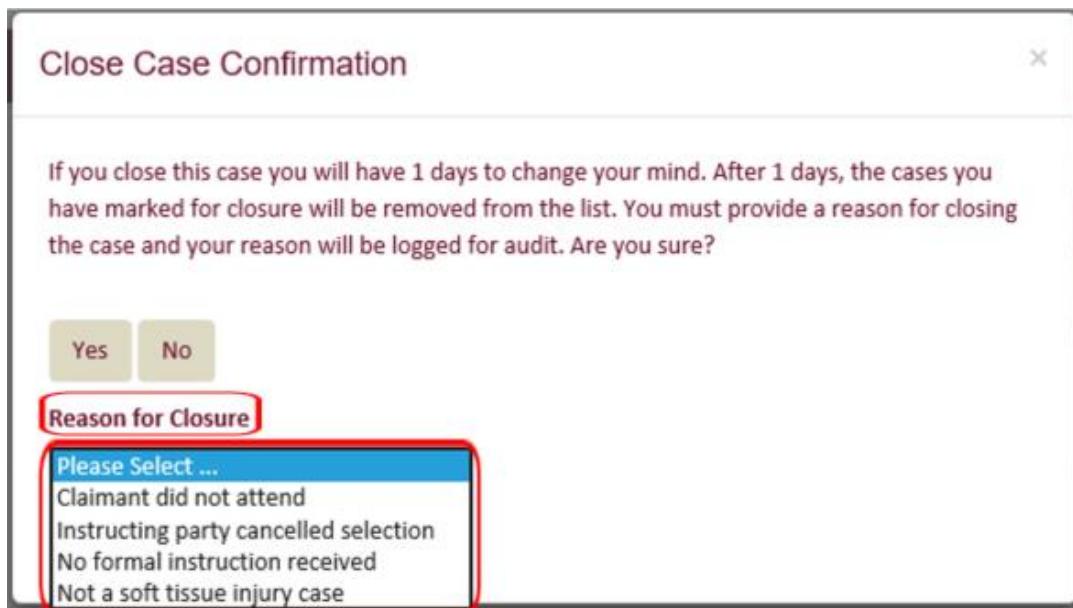
The screenshot shows the 'Outstanding Cases' interface. At the top left is the MedCo logo. Below it is the title 'Outstanding Cases' and a search filter section. The search filter includes fields for 'MedCo Case Reference', 'Authorised User Reference', 'Authorised User Name' (with 'Evans Best' entered), 'Formally Instructed' (with 'All' selected), and 'Status' (with 'Open' selected). There are also 'From Selection Date' and 'To Selection Date' (with '23/04/2018' entered) fields, a 'Search' button, and a 'Download CSV' button. Below the search filter, it says 'Show 10 entries'. The main part of the screen is a table with the following columns: 'Authorised User', 'Authorised User Ref.', 'MedCo Case Reference', 'Selection Date', 'Instruction Received', 'Status', and 'Action'. The table contains three rows of data, each with a 'Close' button in the 'Action' column. The first row is highlighted, and its 'Close' button is circled in red. At the bottom left, it says 'Showing 1 to 3 of 3 entries'. At the bottom right, there are 'Previous', '1', and 'Next' navigation buttons.

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

3. 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.



4. Select one of the **Reason for Closure** from the dropdown list.



5. 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?

Reason for Closure

No formal instruction received

6. Having saved the Reason for Closure you are then returned to your list of search results on the Outstanding Cases screen.
7. 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

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

Showing 1 to 3 of 3 entries

8. After this set number of days, it will be permanently removed from your list of cases and will no longer appear in a search result.
9. To view closed cases use the Search for Closed/Archived Cases function on the main menu.