

## Monthly Activity Checklist 2026-2027

Quarter 2 - 2026/27

JULY – SEPTEMBER 2026

| Activity                                         | Component                                                                                                                                                                                                                               | Platform                                                                                                           | Claim Period                                                                                                          | Deadline                                                                             | Completed                |
|--------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|--------------------------|
|                                                  | The quarterly <b>Quality for Optometry</b> payment is currently £1300 (from 1 <sup>st</sup> April 2025) and is subject to completion of all mandatory contractual elements within the quarter:                                          |                                                                                                                    |                                                                                                                       |                                                                                      |                          |
| <b>Workforce Data Submission</b>                 | <p>Access PCWIS to input data on employed staff on a monthly basis.</p> <p>Access PCWIS to input locum data on a minimum of a quarterly basis (can be entered monthly if preferred).</p>                                                | <p>PCWIS <a href="#">here</a></p> <p>Information:</p> <p><a href="#">Workforce reporting - Optometry Wales</a></p> | Workforce monthly data for <b>JULY</b><br>Submission between 6 <sup>th</sup> July – 5 <sup>th</sup> August            | 5 <sup>th</sup> August 2026                                                          | <input type="checkbox"/> |
|                                                  |                                                                                                                                                                                                                                         |                                                                                                                    | Workforce monthly data for <b>AUGUST</b><br>Submission between 6 <sup>th</sup> Aug – 5 <sup>th</sup> September        | 5 <sup>th</sup> September 2026                                                       | <input type="checkbox"/> |
|                                                  |                                                                                                                                                                                                                                         |                                                                                                                    | Workforce monthly data for <b>SEPTEMBER</b><br>Submission between 6 <sup>th</sup> September – 5 <sup>th</sup> October | 5 <sup>th</sup> October 2026                                                         | <input type="checkbox"/> |
|                                                  |                                                                                                                                                                                                                                         |                                                                                                                    | Locum quarterly data<br>For locums employed in quarter 2<br>(July - September 2026)                                   | 5 <sup>th</sup> October 2026<br><br>(locum data can be entered monthly if preferred) | <input type="checkbox"/> |
| <b>Service Insight 2</b>                         | Details will be confirmed by NHS Wales Shared Services Partnership.<br>This service insight will be a survey to be completed by relevant members of the team                                                                            |                                                                                                                    | To be confirmed                                                                                                       | To be confirmed                                                                      | <input type="checkbox"/> |
| <b>Welsh Information Governance (IG) Toolkit</b> | This self-assessment tool enables organisations to measure their level of compliance against national Information Governance standards and legislation. For 2026 Practices must complete and be <b>100% compliant</b> with the toolkit. | Details and submission <a href="#">here</a>                                                                        | Mid -April 2026 - 31 <sup>st</sup> March 2027<br><br>Toolkit went live in mid April 2026                              | 31 <sup>st</sup> March 2027                                                          | <input type="checkbox"/> |



Optometry Wales  
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|                                            |                                                                                                                                                                                                                                                                                   |                                                                         |                                       |                                                    |                          |
|--------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|---------------------------------------|----------------------------------------------------|--------------------------|
|                                            | Submission can be undertaken at any point during the year<br><b>Other Contractual mandatory items - outside of Q3</b>                                                                                                                                                             |                                                                         |                                       |                                                    |                          |
| <b>Service Insight 1</b>                   | Service Insight 1 was an audit of public health advice carried out by the end of June 2026.<br>Results should be studied in July and actions taken as required during Q2.<br><br>Audit will be repeated during Q3                                                                 | <a href="#">Service Insights - Optometry Wales</a>                      | Actions should be taken throughout Q2 | Throughout Q2<br>(no submission required until Q3) | <input type="checkbox"/> |
| <b>Optometry Collaborative Meetings</b>    | A total of £1152.72 (4 x £288.18)* per optometry practice per year for attending 4 meetings in the year.<br>Practices should attend one meeting per quarter.<br>Non-attendance must be communicated to both the LHB and collaborative lead (Buddy practices should be identified) | Online Teams meetings<br><br><a href="#">Information available here</a> | Ongoing                               | As arranged by collaborative leads                 | <input type="checkbox"/> |
| <b>Escalation Toolkit</b>                  | During the 2024/25 negotiations it was agreed that Optometry practices would update their status on the escalation toolkit on a monthly basis.<br>This is expected to be introduced during 2026/27 – more detail to follow<br>(no action required until it is launched)           | Detail to be confirmed                                                  | Detail to be confirmed                | Detail to be confirmed                             | <input type="checkbox"/> |
| <b>Electronic Referral System (OPERAi)</b> | The National Electronic Referral System was rolled out across Wales during Quarter 1 2026/27.<br>All practices should ensure that their teams are using ERS for referrals as detailed in the WGOS manuals                                                                         | <a href="#">Details here</a>                                            | Ongoing                               | Ongoing                                            | <input type="checkbox"/> |

**Contractors are reminded that completion of all the elements are CONTRACTUAL MANDATORY requirements.**

**Non-completion therefore may lead to the LHB taking action through their BREACH process.**

**Version created 16/06/2026**