

Monthly Activity Checklist 2026-2027

Quarter 2 - 2026/27

JULY – SEPTEMBER 2026

Activity	Component	Platform	Claim Period	Deadline	Completed
	The quarterly Quality for Optometry payment is currently £1300 (from 1 st April 2025) and is subject to completion of all mandatory contractual elements within the quarter:				
Workforce Data Submission	Access PCWIS to input data on employed staff on a monthly basis. Access PCWIS to input locum data on a minimum of a quarterly basis (can be entered monthly if preferred).	PCWIS here Information: Workforce reporting - Optometry Wales	Workforce monthly data for JULY Submission between 6 th July – 5 th August	5 th August 2026	☐
			Workforce monthly data for AUGUST Submission between 6 th Aug – 5 th September	5 th September 2026	☐
			Workforce monthly data for SEPTEMBER Submission between 6 th September – 5 th October	5 th October 2026	☐
			Locum quarterly data For locums employed in quarter 2 (July - September 2026)	5 th October 2026 (locum data can be entered monthly if preferred)	☐
Service Insight 2	Details confirmed by NHS Wales Shared Services Partnership. This service insight needs to be completed by all optometrists	01-07-2026 Service-Insight-2-2026-27	All optometrists must complete the survey on the experience of Prevention in WGOS by 23:59 on 26/10/2026.	26/10/2026	☐



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Welsh Information Governance (IG) Toolkit	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 100% compliant with the toolkit. Submission can be undertaken at any point during the year	Details and submission here	Mid -April 2026 - 31 st March 2027 Toolkit went live in mid April 2026	31 st March 2027	☐
Service Insight 1	Service Insight 1 was an audit of public health advice carried out by the end of June 2026. Results should be studied in July and actions taken as required during Q2. Audit will be repeated during Q3	Service Insights - Optometry Wales	Actions should be taken throughout Q2	Throughout Q2 (no submission required until Q3)	☐
Optometry Collaborative Meetings	A total of £1152.72 (4 x £288.18)* per optometry practice per year for attending 4 meetings in the year. Practices should attend one meeting per quarter. Non-attendance must be communicated to both the LHB and collaborative lead (Buddy practices should be identified)	Online Teams meetings Information available here	Ongoing	As arranged by collaborative leads	☐
Escalation Toolkit	During the 2024/25 negotiations it was agreed that Optometry practices would update their status on the escalation toolkit on a monthly basis. This is expected to be introduced during 2026/27 – more detail to follow (no action required until it is launched)	Detail to be confirmed	Detail to be confirmed	Detail to be confirmed	☐
Electronic Referral System (OPERAi)	The National Electronic Referral System was rolled out across Wales during Quarter 1 2026/27. All practices should ensure that their teams are using ERS for referrals as detailed in the WGOS manuals	Details here	Ongoing	Ongoing	☐

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.

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