Monthly Activity Checklist 2026-2027

Quarter 3 - 2026/27 OCTOBER - DECEMBER 2026					
Activity	**Component**	**Platform**	**Claim Period**	**Deadline**	**Completed**
	The **Quality for Optometry** payment is currently **£1300/ Quarter** (from 1st April 2025) and is subject to completion of all mandatory contractual elements within the quarter. Payment for Q3 will be made in **January 2027**				
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 **OCTOBER** Submission between 6th October – 5th November	5th December 2026	☐
			Workforce monthly data for **NOVEMBER** Submission between 6th Nov – 5th December 2026	5th December 2026	☐
			Workforce monthly data for **DECEMBER** Submission between 6th December – 5th January 2027.	5th January 2027	☐
			Locum quarterly data For locums employed in quarter 3 (October - December 2026)	5th January 2027 (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 experience of Prevention in WGOS by 23:59 on 26/10/2026.	26/10/2026	☐

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NHS Wales Staff Survey	Optometry Practices are expected to ensure that all of their practice teams undertake the NHS Wales Staff Survey. This requirement replaces the requirement to undertake the Primary Care Wellbeing and Inclusion Survey	NHS Wales Staff Survey - HEIW	The survey is open from 5th October to 30th November	30th November	☐
Service Insight 1	Service Insight 1 was an audit of public health advice carried out by the end of June 2026. Audit will be repeated during Q3 – dates of the re-audit will be communicated in Q3	Service Insights - Optometry Wales	Complete Part B of the audit and submit it to your Health Board by **12 noon on 14 December 2026**	14 December 2026	☐
Service Insight 3	Service Insight 3 will be a survey required to be completed by specific members of the optometry team. The survey will be shared by NWSSP to all practice NHS email addresses.	Detail to be shared	Details TBC	Submission date TBC	☐
Quality for Optometry Self Assessment	The QFO Self-Assessment tool is released on an annual basis and requests contractors to provide assurance to NHS Wales on a variety of contractual and legal matters	Detail to be shared	Expected to be launched in December for completion by the end of March. OW will create updated guidance to support completion	31st March 2027	☐
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 - 31st March 2027 Toolkit went live in mid April 2026	31st March 2027	☐
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	☐

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

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

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