

Monthly Actions Checklist 2025-2026

Quarter 4 - 2025/26					
Activity	Component	Platform	Claim Period	Deadline	Completed
	The quarterly Quality for Optometry payment is £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 quarterly basis.	PCWIS here	Locum quarterly data For locums employed in quarter 3 (October – December 2025)	5 th January 2026	<input type="checkbox"/>
			Workforce monthly data for DECEMBER Submission date: 6 th December 2025 – 5 th January 2026	5 th January 2026	<input type="checkbox"/>
			Workforce monthly data for JANUARY Submission date: 6 th January – 5 th February 2026	5 th February 2026	<input type="checkbox"/>
			Workforce monthly data for FEBRUARY Submission date: 6 th February to 5 th March 2026	5 th March 2026	<input type="checkbox"/>
			Workforce monthly data for MARCH 6 th March to 5 th April 2026	5 th April 2026 (N.B. date likely to be brought forward to 31 st March)	<input type="checkbox"/>
			Locum quarterly data For locums employed in quarter 4 (JANUARY-MARCH 2026)	5 th April 2026 (N.B. date likely to be brought	<input type="checkbox"/>



Monthly Actions Checklist 2025-2026

				forward to 31 st March)	
Quality for Optometry Toolkit Annual Return	<p>Contractor must complete all sections and submit the required documents for review by the Local Health Board.</p> <p>Optometry Wales has created a guidance document for contractors to use. Optometry Wales Guidance QfO – PDF/Word</p>	Excel spreadsheet submitted to local health board	December 2025 – March 2026	31 st March 2026	<input type="checkbox"/>
Quality for Optometry Improvement Plan	<p>Contractors must reflect on areas of non-compliance within the Quality for Optometry Toolkit (including the IG Toolkit) and must submit an Improvement Plan to the Local Health Board.</p> <p>Optometry Wales have created a template action plan that practices can use if they wish for this purpose PDF /Word</p>	Document submitted to local health board as part of Quality for Optometry Toolkit Annual Return	December 2025 – March 2026	31 st March 2026	<input type="checkbox"/>
Welsh Information Governance (IG) Toolkit	This self-assessment tool enables organisations to measure their level of compliance against national Information Governance standards and legislation. Practices must complete and submit the toolkit.	Details and submission here	31 st March 2026		<input type="checkbox"/>
Optometry Collaborative Meetings	A total of £1108.40 (4 x £277.10) per optometry practice per year for attending 4 meetings in the year.	Online Teams meetings	Ongoing – Attend the meeting for Quarter 4	As arranged by collaborative leads – claim by end of financial year	<input type="checkbox"/>

