

## 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 <sup>st</sup> April 2025) and is subject to completion of all mandatory contractual elements within the quarter.				
Workforce Data Submission	<p>Access PCWIS to input data on employed staff on a monthly basis.</p> <p>Access PCWIS to input locum data on a quarterly basis.</p>	PCWIS <a href="#">here</a>	Locum quarterly data  For locums employed in quarter 3 (October – December 2025)	5 <sup>th</sup> January 2026	<input type="checkbox"/>
			Workforce monthly data for DECEMBER  Submission date: 6 <sup>th</sup> December 2025 – 5 <sup>th</sup> January 2026	5 <sup>th</sup> January 2026	<input type="checkbox"/>
			Workforce monthly data for JANUARY  Submission date: 6 <sup>th</sup> January – 5 <sup>th</sup> February 2026	5 <sup>th</sup> February 2026	<input type="checkbox"/>
			Workforce monthly data for FEBRUARY  Submission date: 6 <sup>th</sup> February to 5 <sup>th</sup> March 2026	5 <sup>th</sup> March 2026	<input type="checkbox"/>
			Workforce monthly data for MARCH  6 <sup>th</sup> March to 5 <sup>th</sup> April 2026	5 <sup>th</sup> April 2026  (N.B. date likely to be brought forward to 31 <sup>st</sup> March)	<input type="checkbox"/>
			Locum quarterly data  For locums employed in quarter 4 (JANUARY-MARCH 2026)	5 <sup>th</sup> April 2026  (N.B. date likely to be brought	<input type="checkbox"/>



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				forward to 31 <sup>st</sup> March)	
<b>Quality for Optometry Toolkit Annual Return</b>	<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 – <a href="#">PDF/Word</a></p>	Excel spreadsheet submitted to local health board	December 2025 – March 2026	31 <sup>st</sup> March 2026	<input type="checkbox"/>
<b>Quality for Optometry Improvement Plan</b>	<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 <a href="#">PDF /Word</a></p>	Document submitted to local health board as part of Quality for Optometry Toolkit Annual Return	December 2025 – March 2026	31 <sup>st</sup> March 2026	<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. Practices must complete and submit the toolkit.	Details and submission <a href="#">here</a>	31 <sup>st</sup> March 2026		<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.	Online Teams meetings	Ongoing – Attend the meeting for Quarter 4	As arranged by collaborative leads – claim by end of financial year	<input type="checkbox"/>

