

## Monthly Activity Checklist 2026-2027

Quarter 1 - 2026/27					
Activity	Component	Platform	Claim/ Activity 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>	Access PCWIS to input data on employed staff on a monthly basis.	PCWIS <a href="#">Workforce reporting - Optometry Wales</a>	Workforce monthly data for APRIL Submission between 6 <sup>th</sup> April – 5 <sup>th</sup> May	5 <sup>th</sup> May 2026	<input type="checkbox"/>
	Access PCWIS to input locum data on a minimum of a quarterly basis (can be entered monthly if preferred).		Workforce monthly data for MAY Submission between 6 <sup>th</sup> May – 5 <sup>th</sup> June	5 <sup>th</sup> June 2026	<input type="checkbox"/>
			Workforce monthly data for JUNE Submission between 6 <sup>th</sup> June – 5 <sup>th</sup> July	5 <sup>th</sup> July 2026	<input type="checkbox"/>
			Locum quarterly data For locums employed in quarter 1 (April - June 2026)	5 <sup>th</sup> July 2026	<input type="checkbox"/>
<b>Service Insight 1</b>	Details will be confirmed by NHS Wales Shared Services Partnership. This service insight will be in an audit format and will be required to be re-visited later in the year	<a href="#">Service Insights - Optometry Wales</a>	Initial Audit should be undertaken during June  Results should be studied in July and actions taken as required during Q2.  Audit will be repeated during Q3	No submission of data required in Q1. Initial audit should be undertaken by 30 June.	<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 100% compliant with the toolkit.  Activity can be planned at any time during 2026/27	Details and submission <a href="#">here</a>	Mid -April 2026 - 31 <sup>st</sup> March 2027 (Toolkit expected to go live mid April 2026)	31 <sup>st</sup> March 2027	<input type="checkbox"/>



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	Other Contractual mandatory items – outside of QFO				
<b>Practice Development Plan</b>	These plans will look at future aspirations of practices to expand into provision of different levels of WGOS and mobile provision.	<a href="#">Practice Development Plans - Optometry Wales</a>	Information sent by LHBs to all practices on 15 April 2026	30 <sup>th</sup> June 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. Practices should attend one meeting per quarter. Non-attendance must be communicated to both the LHB and collaborative lead.	Online Teams meetings  <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. This is expected to be introduced during 2026/27 – more detail to follow	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 is being rolled out across Wales by the end of Quarter 1 2026/27. Except for BCUHB (which goes live in March 2026) all practices must have completed the onboarding process by 30 April 2026 and start using the ERS once available in their LHB area	<a href="#">Details here</a>		Onboarding must be completed by 30 April 2026  All practices live by end of June and should be using the system	<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.**

**DOCUMENT UPDATED 16/06/2026**