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Introduction

Welcome to the user guide which accompanies the 2017 update to the Quality in Optometry (QiO) platform. For its tenth birthday, QiO has been comprehensively overhauled with new features, new linear navigation and a refined appearance, while outdated content has been removed. QiO’s purpose to host clinical governance compliance toolkits for optical professionals remains unchanged.

The URL for QiO is unchanged: http://www.qualityinoptometry.co.uk/

We hope that you will find it an improved user experience. Here is the new home page:
Navigation overview

The core tabs of QiO are the same as before. All the tabs are accessible directly from the home page. They are:

- **GOS Contracts**: the portal for GOS compliance checklists which is for all GOS contractors
- **NHS Contracts**: the portal for NHS Standard Contract checklists which is for LOC companies or practices contracting directly with CCGs in extended primary eye care services (also known as community/enhanced services; shared care), or subcontractors to LOC companies.
- **Practitioners**: checklist for performers
- **Staff**: checklist for optical practice staff
- **Audit**: record keeping and infection control audit tools
- **Policies**: policy bank for contractual usage (see the section in this guide)
- **QiO in England**: a summary landing page and alternative route to other pages.

Users can simply select whichever one applies (e.g. GOS Contracts) to get going. Alternatively, the home page includes a series of hyperlinked shortcuts if you prefer to jump straight in.

Existing users will notice that a lot of redundant content has been removed. Over a decade QiO had accumulated a lot of baggage which has been reduced as part of this update for the purposes of streamlining.
New features

There are a variety of new features in QiO:

1. Linear checklist format

The most immediate update to QiO is the new linear format. This is designed to provide a more modern feel to checklists and removes the need to scroll down lots of text. This linear format is in place for all checklists.

Once a question is completed the main question at the top of the screen will change colour to green or red, depending whether the response was compliant with the question. When a question has multiple textboxes or checkboxes, every box must be completed.

Clicking 'Next' takes users to the next question.

Users can still bring up the list of questions by clicking the Question Browser buttons at the top and bottom of the page:
2. New account fields

Checklists have new fields to complete to start the checklist:
3. Expanded NHS Standard Contracts section

The NHS Standard Contract now has two versions, the Short Form version and the Long Form version. Although NHS England recommends that commissioners use the Short Form, in some cases the Long Form will still be used by commissioners.

The three contracting scenarios remain as they were: ‘LOC company’, ‘LOC company subcontractor’ and ‘practice contracting direct’, each with a checklist for Short and Long form as appropriate. This makes a total of six main checklists available on the left-hand side of the NHS Contracts page with explanatory text for choosing the appropriate checklist as below:

Selecting any main checklist ((e.g. LOC company (short form)) brings up the sub checklists for that contracting scenario. In all cases these sub checklists are ‘General conditions,’ ‘Service conditions,’ and ‘Information governance’ to reflect the NHS Standard Contract. However, actual questions vary by scenario.
4. Policy Builder feature

This automated function now helps users create up-to-date eyecare policies for their company. To use this function, visit the **Policies** section in the main menu.

You will be shown a list of available policies. Be sure to use policies from the correct section for your company:

**Practice Contracting Direct / Subcontractor**

- Business Continuity and Disaster Recovery Plan  
  updated 19/01/2017
- Clinical Governance Policy  
  updated 14/01/2017
- Complaints Policy  
  updated 14/01/2017
- Conflict of Interest Policy  
  updated 14/01/2017
- Counter-Fraud and Security Management Policy  
  updated 19/01/2017
- Death of a Service User  
  updated 14/01/2017
- Environmental Management System  
  updated 14/01/2017

**Primary Eyecare Company**

- Board Meeting Template  
  updated 14/01/2017
- Business Continuity and Disaster Recovery Plan  
  updated 14/01/2017
- Clinical Governance Policy  
  updated 14/01/2017
- Complaints Policy  
  updated 14/01/2017
- Conflict of Interest Policy  
  updated 14/01/2017
- Counter-Fraud and Security Management Policy  
  updated 14/01/2017
Selecting a policy brings up the details that are needed to personalise the policy for your practice. Your existing QiO details will be pre-filled if available, but several policies also require

Clicking on the **Download** button generates the policy from the information you provided:

```
Document name: Complaints Policy
Author: Test
Approved by: Test
Date created: 02 February 2017
```

**Test:**

```
Complaints Policy

The Company will endeavour to deliver a service whereby the likelihood of complaints being made is very low. However, if complaints do occur, the Company is well placed to address these and implement lessons learned in order to improve the quality of our service provision, in the interests of patients.

This review/analysis mechanism allows the Company to identify areas for improvement. Central to the Company’s complaints policy is an emphasis on transparency for all parties.
```

This automation saves users admin time by providing a suggested framework. BUT make sure you read through the policy, make any adjustments as necessary, and are completely happy with it.

You are legally responsible for the policies in place at your company – not LOCSU.
5. Built-in ‘Submit to NHS’ feature

A recurring problem with the previous submission process was with emails not getting through or getting lost. To solve this, it is now possible to submit checklists directly to the NHS and/or your LOC company for verification purposes directly in Quality in Optometry.

These submissions are stored along with the date of the submission on QiO in a secure admin area, for NHS and LOC company administrators to access. (Each LOC company’s clinical governance and performance lead has had an account set up using their email address as submitted to LOCSU.)

To submit your completed GOS or NHS subcontractor checklist, first complete all the separate sections of the checklist. If you give any uncompliant responses, you will also need to complete an Action Plan for those responses to indicate what action you will be taking.

When this is complete, go to the bottom of the main checklist page to the Submit to the NHS section (for GOS checklists) or Submit to PECS (for NHS subcontractor checklists).

Click the Start process... button to continue.

Submit to the NHS

Quality in Optometry can now submit checklists directly to the NHS. When you have completed all checklists above, click the button below to start the submission process.

Start process...

See the report that will be included with your submission:

  PDF report  Excel report
On the following confirmation screen, you will be asked to confirm the details selecting continue brings up the field-entry screen.

After you verify the information in the fields is correct, you can also see the PDF and Excel reports that will be submitted — you can save a copy of these for your own records.

Note: By selecting a Primary Eyecare Company from the dropdown, the clinical governance and performance lead at the will be able to access submissions submitted to them.

Click **Submit now** to submit your checklist to the NHS (for GOS checklist) or your PECS (for NHS subcontractor checklists).

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### Confirm submission

Confirm the details below are correct then click **Submit now**. You will no longer be able to edit this checklist after you have submitted it.

**Contractor** *

- **SHAX**

**Contractor address** *

- A
- B
- C
- D

**CCG (NHS clinical commissioning group)** *

- **Ashford CCG**

**LOC (local optometric committee)** *

- **Bolton LOC**

**Submit now**

See the report that will be included with your submission:

- [PDF report](#)
- [Excel report](#)