

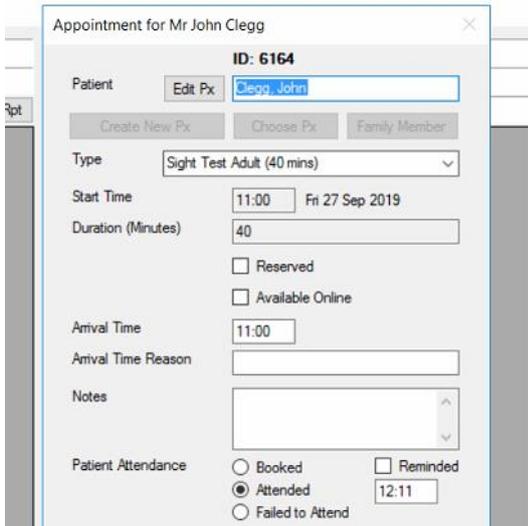
This describes a possible process for the journey of English electronic GOS1 claim forms within a practice using i-Clarity, using the suggested hardware of a tablet for patient signatures and a graphics tablet or standard computer mouse for optometrist signatures and contractor signatures.

There is now no clinic preparation required for the NHS forms.

Part 1: The patient attends their appointment

Open the appointment diary on the tablet running i-Clarity.

Double click on the patient’s appointment, when the edit appointment screen opens, change the appointment status to attended.



The edit appointment screen will automatically close. i-Clarity will have registered the last appointment that was selected so you can now click on the view patient button at the bottom of the screen to view the patient record.



Check the patients details and confirm they are entitled to an NHS sight test or not. If the patient is entitled to an NHS sight test, then click on the px claims button.

FTA Count 0

Appt. Booked

Print Px Slip

Px Claims

Canx.

Copy Patient

Family Filter

This will open the GOS1 Claim form

Claims for Nick Hobbs

Claim Type: GOS1 Claim Ref: Created on: 07-Apr-2020

Save New Delete View Audit Scan and Store Progress Notes Exit

GOS1 GOS3

Claim reference: []

Title: Mr

Forename: Nick

Surname: Hobbs

DOB: 01-Jan-1900

Previous surname: []

Address line 1: 14 Station Road

Address line 2: Ewyas Harold

Address line 3: Hereford

Address line 4: Herefordshire

Address line 5: []

Postcode: HR2 0HX

NHS number: []

NI number: []

I am the: Patient Parent Carer or guardian

Sig. Date / Ref: [] Add Signature

The patient: is aged under 16 years is aged over 60 years is over 40 and has relevant family history of glaucoma has glaucoma is at risk of glaucoma has diabetes has been prescribed complex lenses is a prisoner on leave is registered blind or partially sighted aged 16 to 18 and in full-time education

Income support Universal credit PCG JSA ESA Tax Credit Evidence Seen

BENEFIT RECIPIENT
(Only complete this section if different from patient)

Forename: []

Surname: []

NI Number: []

DOB: []

Establishment name: []

Establishment town: []

HC2 cert. number: []

Last eye exam: 06-Apr-2020 First test Unknown

TO BE COMPLETED BY THE PRACTITIONER WHO HAS CONDUCTED THE EYE EXAM

Early recall code: NONE Select Remove

Exam date: [] Link Payment

Referred to: [PLEASE SELECT]

Prescription: [PLEASE SELECT OR CHECK BOX BELOW]

No prescription statement required:

Ethnicity: Unknown

1st voucher type: [] or Complex Prism Tints

Supplements: [] or Complex Prism Tints

2nd voucher type: []

Optom title: []

Optom forename: [] Load Exam Details

Optom surname: []

Optom signature date: [] Add Signature

Optom list no: []

TO BE COMPLETED BY THE CONTRACTOR OR AUTHORISED SIGNATORY

Signature forename: [] Authorise Signature

Signature surname: []

Contractor signature date: []

Submit Get Status Error Codes

If this is the first time a claim has been created for this patient it will open on a new form. If it is not you will need to click the New button at the top of the page.

New unsaved forms will be coloured green and will not have a claim reference at the top of the form. Saved claims will be white and will have a claim reference.

GOS1 GOS3

Claim reference: 1167

It is advised that you complete the first two columns of the GOS1 form before the patient's appointment.

The patients Name, Address, DOB will be carried through from the main record to the claim form.

Depending on the patients age some of the entitlement reasons may be automatically completed e.g. Over 60 or under 16.

The NHS reason that is also selected on the front screen will also be automatically be completed on the claim form.

Check these automatic selections and make any additions or amendments.

If it is not the patient that receives the benefit selected in the blue box, then complete the section under the title 'benefit recipient'.

If you have selected an entitlement reason that is prisoner on leave, full time ed, or medical entitlement that requires doctors details we would advise that you complete the

establishment name and town field like you would on a paper GOS1. (i-Clarity will automatically populate these fields where possible)

Establishment name:

Establishment town:

If the patient has had an appointment with you before, i-Clarity will populate the last eye exam field. You can over type this if it is a first exam with you or they have been elsewhere since the last exam with you. Or if the patient does not know when their last sight test was you can select the unknown tick box. If it is the patients first ever sight test, then tick the first test tick box.

Last eye exam: First test
 Unknown

Once you have completed these details the patient now needs to sign the form.

Double click on the signature date in the first column. This will enter todays date and will open the signature box

I am the: Patient Parent
 Carer or guardian

Sig. Date / Ref:

Pass the tablet to the patient, ask the patient to sign in the black outline box.

entitled to an NHS funded sight test and I consent to the disclosure of relevant information for the purpose of checking this and in relation to the prevention and detection of fraud. I agree to repay the cost of the sight test if I am later found not to be entitled to it.

Click save under the signature.

You can now exit the form.

This partially complete form will now sit in the claim's module for this patient ready for the optometrist to pick up after they have completed the sight test.

Parent/Carer/Guardian signatures

Clicking on one of the bullet points for parent, carer/guardian will cause a blue box to appear that you can enter the name and address details of the parent/carers/guardian in.

I am the:

Patient Parent
 Carer or guardian

PARENT / CARER / GUARDIAN

Forename:

Surname:

Address line 1:

Address line 2:

Address line 3:

Postcode:

Sig. Date / Ref:

If the parent/carers/guardian are a patient then you can click on the find button, this will bring up a patient search facility.

Or you can populate the address fields by ticking the box next to postcode, typing the postcode in the box and clicking enter on the keyboard.

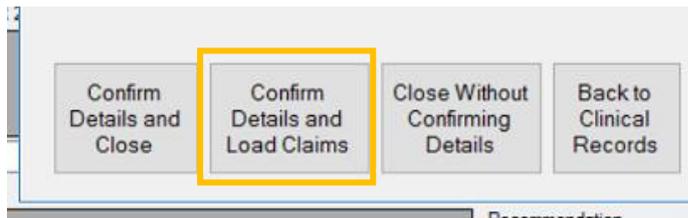
New future claims will automatically bring through the previous parent/carers/guardian details, but these can be overtyped if needed.

Part 2: The end of the eye examination, Optometrist signature.

The optometrist would now complete the eye examination.

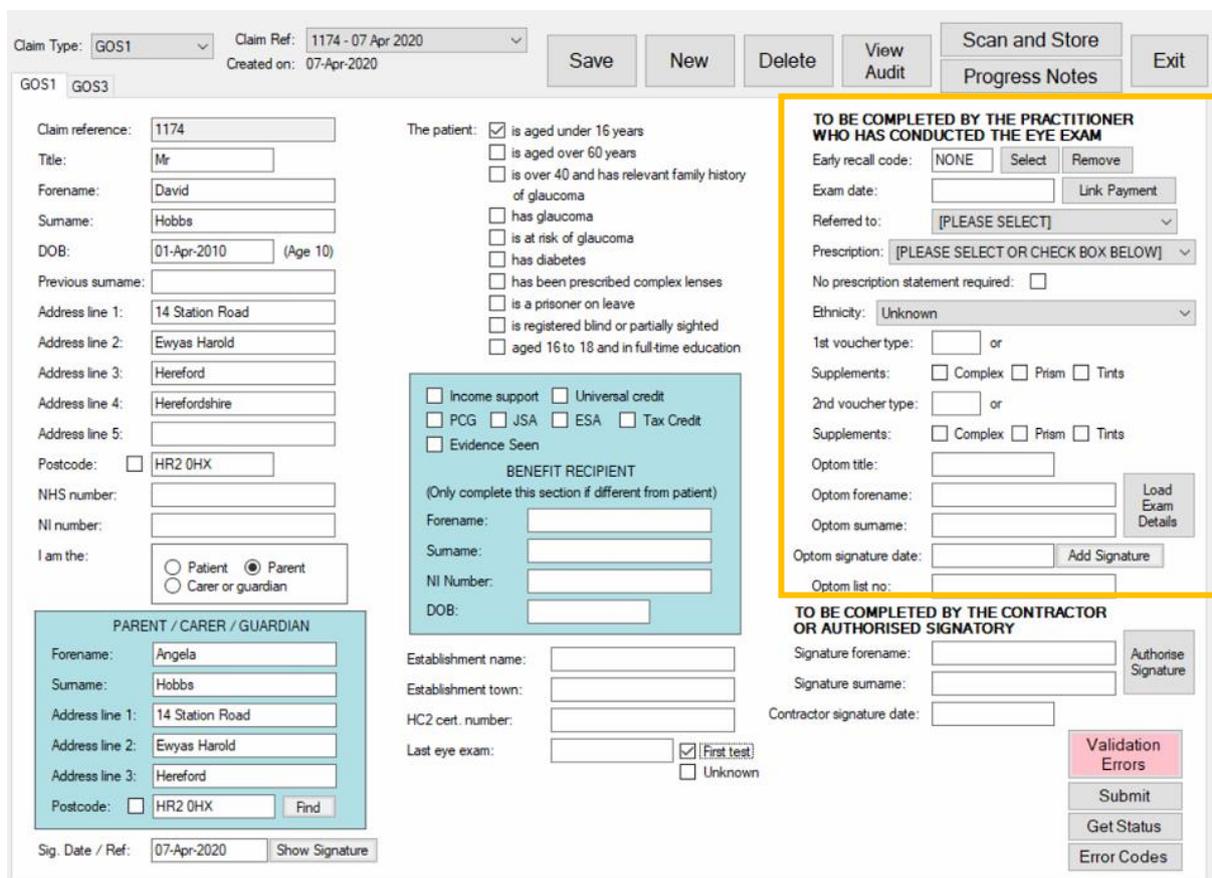
At the end of the examination double check the NHS fee has been assigned in the selected fees box, then click 'Confirm Details and Load Claims'.

From the RX form click 'Save Record and Load Claims'



The NHS sight test fee will automatically be entered on to the patient till and listed in deferred payments. It will also be automatically linked to the started claim.

After clicking the confirm details and load claims the partially completed claim form that the patient signed before the sight test will be loaded. The Optometrist should now complete the top section of the last column.

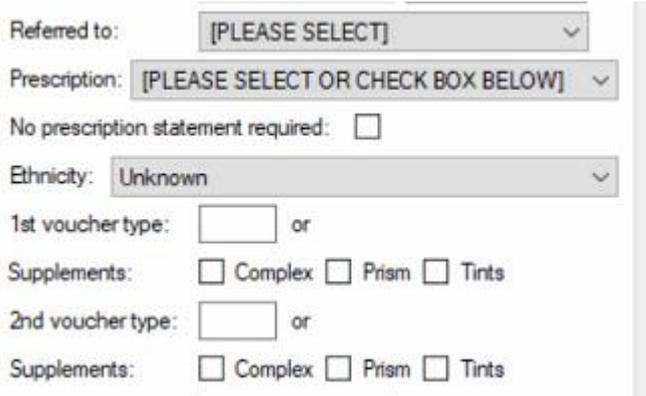


If an early recall code was selected on the clinical record it will automatically populate the claim. The exam date will be automatically populated with the exam date.



Early recall code: NONE Select Remove
Exam date: 27-Sep-2019

The optometrist should complete the following:



Referred to: [PLEASE SELECT] v
Prescription: [PLEASE SELECT OR CHECK BOX BELOW] v
No prescription statement required:
Ethnicity: Unknown v
1st voucher type: or
Supplements: Complex Prism Tints
2nd voucher type: or
Supplements: Complex Prism Tints

The optometrist title, forename, surname and list number should have been automatically populated.



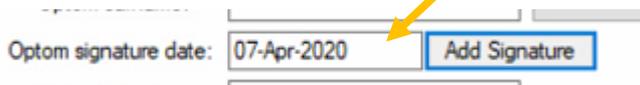
Optom title: Mr
Optom forename: eGOS
Optom surname: Optom
Optom signature date: 03-Apr-2020 Show Signature
Optom list no: 10007
Load Exam Details

If the exam date, early recall code, optometrist title, forename, surname and list number have not been automatically completed click the 'load exam details' button.

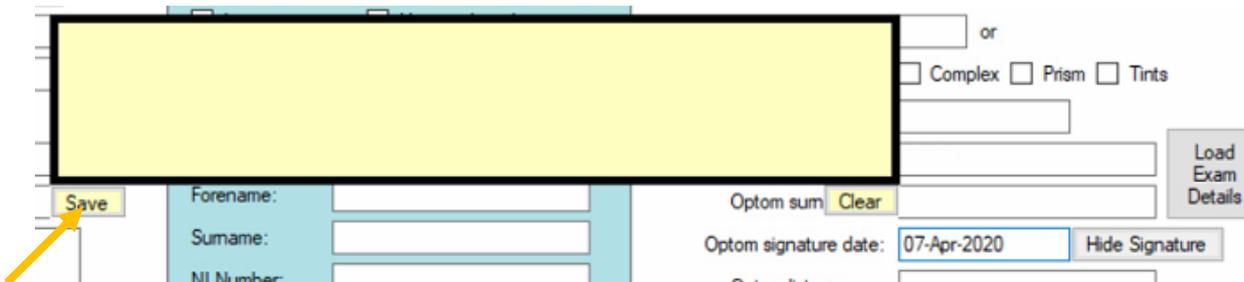
These details will not be automatically completed if there is no partially completed claim waiting for the exam and optometrist details to become available. This may arise when it does not become apparent that the patient is entitled to a NHS sight test until after the examination has been started.

(The Optom forename, surname and list number details are taken from fields in the users tab in maintenance, if nothing loads for these fields then you can complete the fields manually and then update your user details in maintenance later.)

Then double click on the optom signature date, this will enter todays date and open the signature box.



Using your mouse or a graphics tablet sign your name in the signature box and click save under the signature.

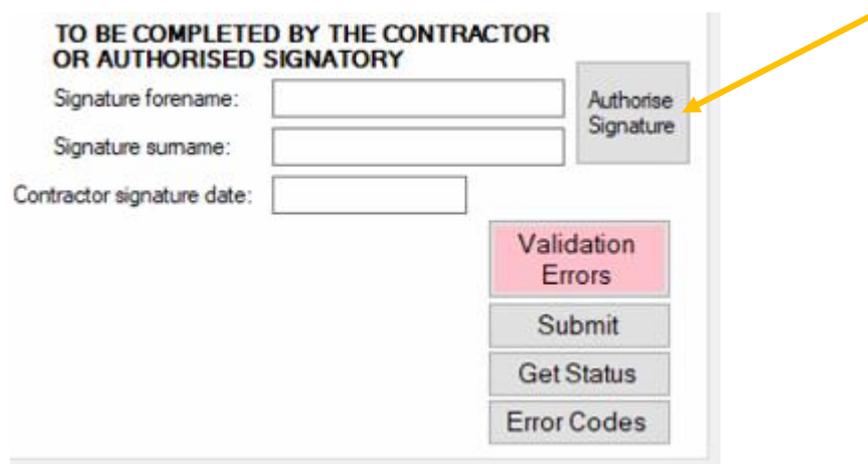


If the Optometrist completing the test is the authorised signature then they have the option of completing the next step, however if the authorised signature is going to be completed by another member of staff you can now exit the form.

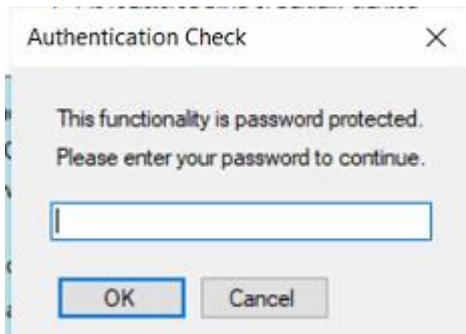
Part 3: Authorised signatory and submitting the form.

Practice list no, contractor forename and surname are stored in the maintenance module and will be automatically submitted with each claim.

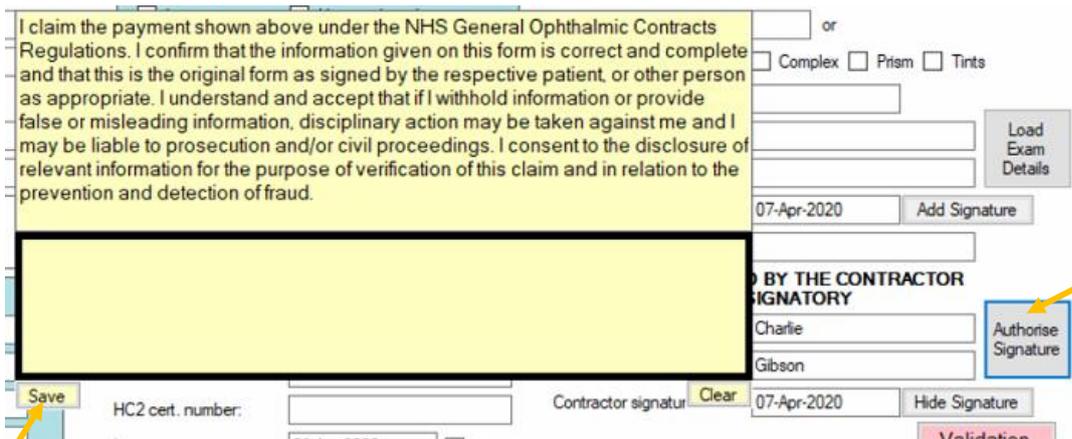
To enter an Authorised signature, click on the 'Authorise Signature' box.



Clicking on this button will open a password box.



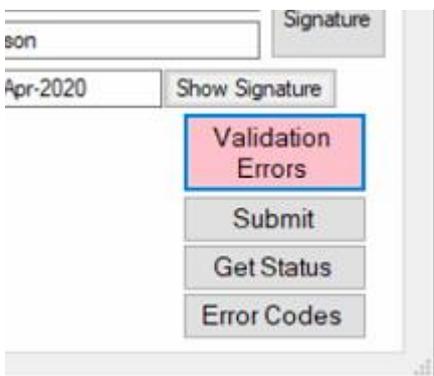
Enter your i-Clarity password and click ok.



Your name will be entered in the name fields and a signature box will open. Enter your signature and click save.

(Only users that have been marked as registered authorised signatures will have their details entered into the claim after entering their password. This is set up in the users tab of maintenance.)

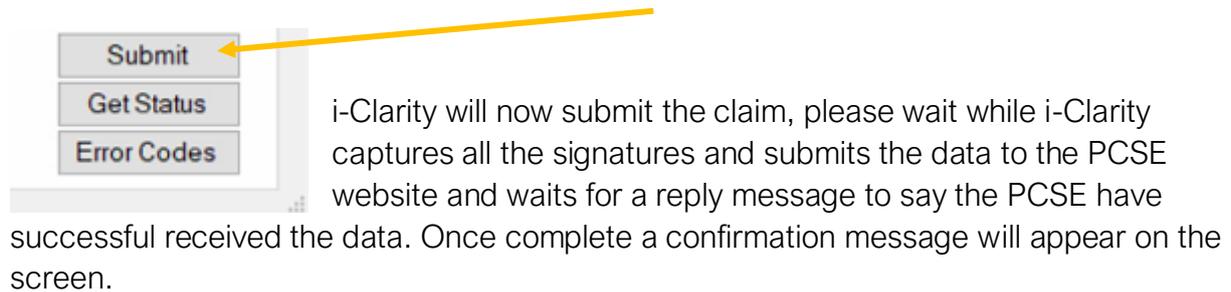
Underneath the authorised signature date there is a pink button called 'Validation Errors'



Once you have clicked save after entering your authorised signature, this box may disappear. If this box disappears then the claim has passed our validation checks.

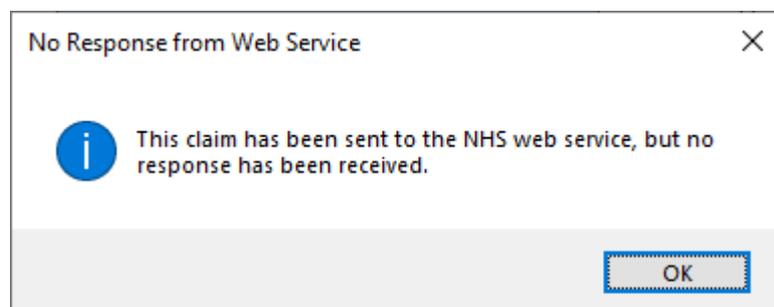
If this box remains on the screen, then you can click on this box and a list of information missing from the claim will be displayed.

Once the 'Validation Errors' box disappears the claim can now be submitted. Double check the claim information and then click the submit button.

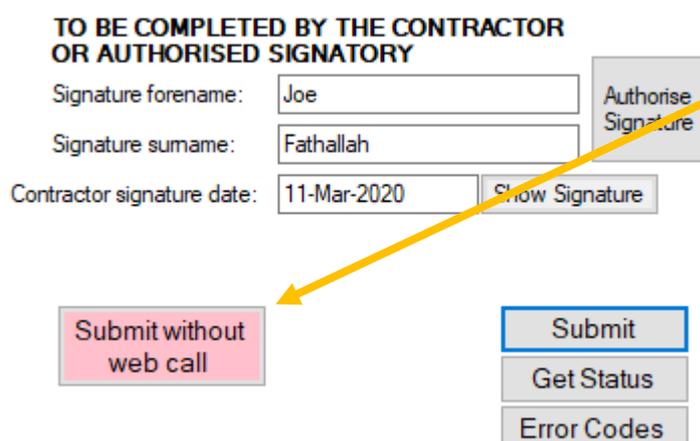


You can now 'Exit' the claim.

*For the confirmation of submission message to appear the PCSE website must return a message to i-Clarity within a time window. If no response is received with in the time window i-Clarity will **not** mark the claim as submitted and display the follow error message.*



If this happens a new button will appear on the claim 'submit without web call'.



Do not try to resubmit the form.

Wait until the end of the day and check the PCSE website to see if the claim has been received.

If the claim was received by the PCSE website, click the button 'Submit without web call' this will mark the claim as submitted in i-Clarity and move it to the deferred payment list 'not yet paid, submitted between...' without resending the claim data to the PCSE website.

If the claim has not appeared on the PCSE website, click the standard 'Submit' button. This will resubmit the claim data to the PCSE website.

Part 4: Checking claim submissions for the day

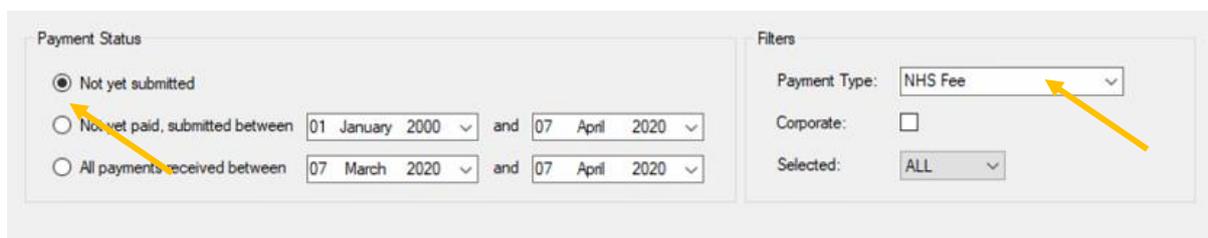
For many practices it may be more appropriate to complete part 3 (above) as a separate daily task rather than throughout the day on a patient by patient basis.

If this is the case, you can use the list of yet to be submitted payments in deferred payments as a checklist. Claims that have been complete using the method described in steps 1 and 2 are automatically linked to NHS payments. These payments are listed in deferred payments.

Open the deferred payments module.



Payments linked to unsubmitted claims will be listed under the payment status 'not yet submitted' and under the payment type 'NHS Fee'.



Payments highlighted in green have no claim linked to them.

Pay Type	Px ID	Patient Name	Corporate	Sale Date	Amount	Submitted	Date Paid	Claim Ref	Selected
NHS Fee	4002	Ashmore, Winnie	N/A	05-12-2019	£21.31				<input type="checkbox"/>
NHS Fee	118	Berry, Lloyd	N/A	03-10-2019	£21.31			89	<input type="checkbox"/>
NHS Fee	4000	Blue, Gwion	N/A	05-12-2019	£21.31				<input type="checkbox"/>
NHS Fee	4000	Blue, Gwion	N/A	05-12-2019	£21.31			1139	<input type="checkbox"/>

Green deferred payments are unlinked e.g. they are not linked NHS fees not linked to an electronic claim form.

Once you start using electronic GOS claims rather than paper forms you should have very few green payments. They will only occur if you have used a paper form or the PCSE website directly. It will also happen if a claim is started after the fee has been assigned to the patients till. For example if it was during the eye examination that it became apparent that the patient was entitled to a NHS examination.

Orange payments are linked to a claim but are missing an authorising signature.

White deferred payment lines are linked to claims and have an authorised signature.

You will also notice that linked claims will have a claim reference number and if you double click on the payment line it will open the patients claim form.

Checking Claim Submissions

Double clicking on a patient name from the list in deferred payments will open the patients claim.

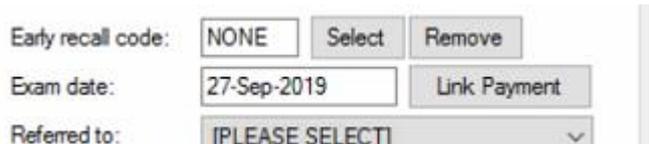
Once the claim is open you can check the claim has all the required information and signatures. Also, that the validation errors button as disappeared or shows no errors.

Once completed you can click the submit button and exit the claim.

Submitted claims will automatically be moved to the status, 'not yet paid, submitted between'

Correcting unlinked claims (Green payments)

If you have any green payments, close the deferred payments module and open the patient record in the normal way. Then open the claim form, because the claim form is not linked to a payment there will be a 'Link Payment' button in the top right corner next to the exam date.



Early recall code: NONE Select Remove
Exam date: 27-Sep-2019 Link Payment
Referred to: PLEASE SELECT

Click on this button

This will open a pop up called unlinked payments, tick the box next to the correct payment. Then click 'Link'

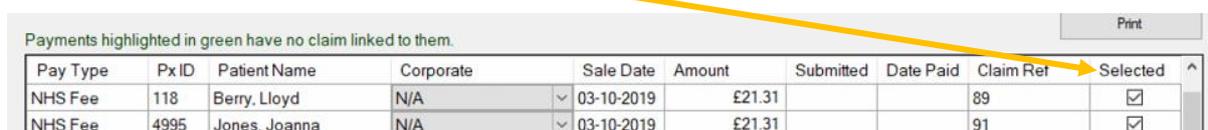
If the form has been completed and signed, you can now submit.

Bulk signatures and submissions.

A feature has been added to i-Clarity that allows you to sign and submit claims in bulk. We do not recommend this feature is used on a regular basis as it is advisable that each claim is individually checked before submitting.

This feature is in the deferred payments module (*it cannot be used with unlinked/green claims/payments*).

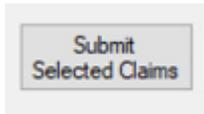
For white payments (claims that have been signed), tick the box next to the payments that you would like to submit.



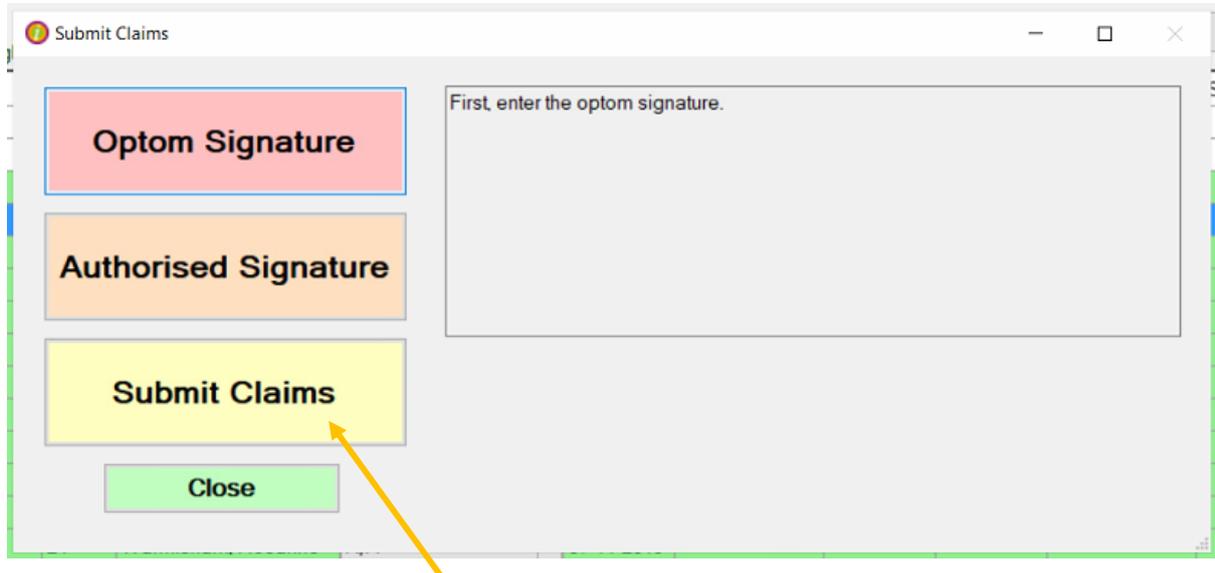
Payments highlighted in green have no claim linked to them. Print

Pay Type	Px ID	Patient Name	Corporate	Sale Date	Amount	Submitted	Date Paid	Claim Ret	Selected
NHS Fee	118	Berry, Lloyd	N/A	03-10-2019	£21.31			89	<input checked="" type="checkbox"/>
NHS Fee	4995	Jones, Joanna	N/A	03-10-2019	£21.31			91	<input checked="" type="checkbox"/>

Click the button at the bottom of the page 'Submit selected claims'

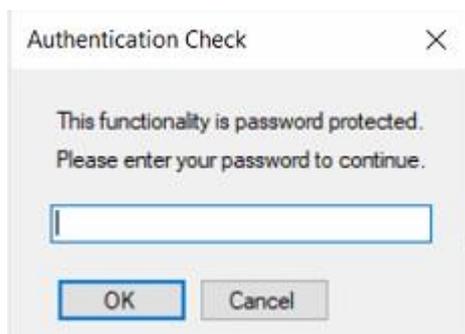


The submit claims form will open.



Click the yellow 'Submit Claims' button.

This will open a password check box to ensure an authorised signatory is submitting the checked claims.



Enter your password and click 'OK'.

Please wait while i-Clarity captures all the required signatures and data, submits it to the PCSE website and waits for a successful response message.

If any of the claims fail our validation so they cannot be submitted, no claims will be submitted. A message will be displayed to tell you which claims needs correcting. You can either remove this from your list of selected claims or correct the validation errors before resubmitting your selection.

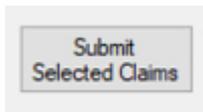
Once the claims have been submitted successfully, they will be moved to the next status.

For orange payments that are missing an authorised signature, tick the box next to the payments that you would like to sign and submit.

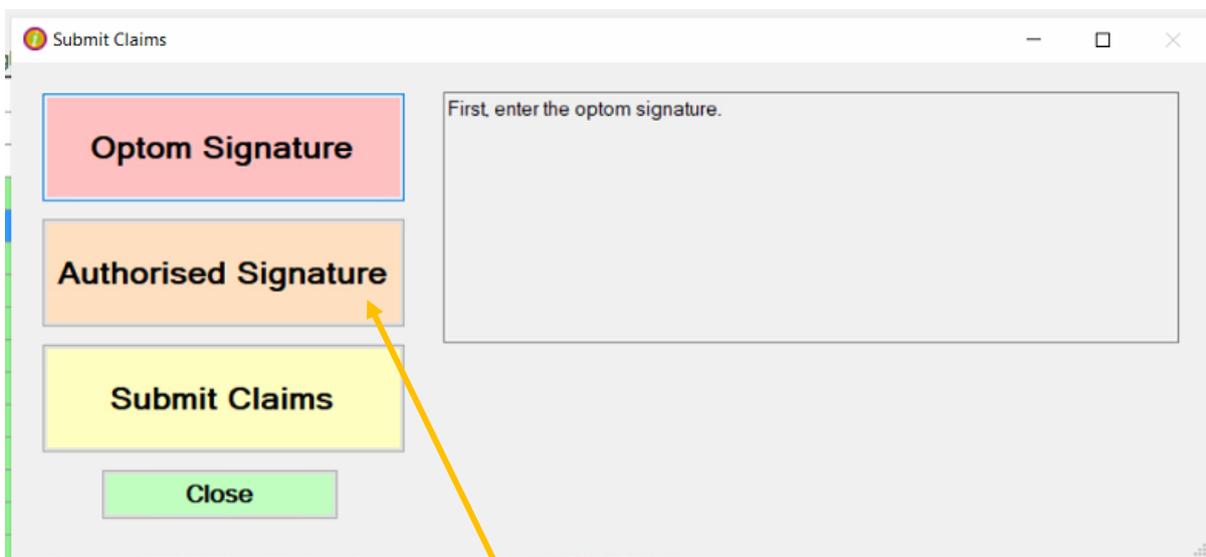
Payments highlighted in green have no claim linked to them. Print

Pay Type	Px ID	Patient Name	Corporate	Sale Date	Amount	Submitted	Date Paid	Claim Ref	Selected
NHS Fee	1100	Cleall, Chloe	N/A	06-12-2019	£21.31			1142	<input checked="" type="checkbox"/>
NHS Fee	1101	Chivers, Gillian	N/A	06-12-2019	£21.31			1143	<input checked="" type="checkbox"/>

Click the button at the bottom of the page 'Submit selected claims'



The submit claims form will open.



Click on the orange 'Authorised Signature' box.

This will open a password check box to ensure a registered authorised signatory is signing the claims.



Enter your password and click 'OK'.

This will open a signature box.

Authorised Signature

I claim the payment shown above under the NHS General Ophthalmic Contracts Regulations. I confirm that the information given on this form is correct and complete and that this is the original form as signed by the respective patient, or other person as appropriate. I understand and accept that if I withhold information or provide false or misleading information, disciplinary action may be taken against me and I may be liable to prosecution and/or civil proceedings. I consent to the disclosure of relevant information for the purpose of verification of this claim and in relation to the prevention and detection of fraud.

Clear

Save Cancel

Sign in the yellow box surrounded by a black box and then click 'Save'.

This will save your signature and name to the claims selected.

Authorised Signature Included

These claims have now been signed.

OK

Submit Claims

Optom Signature

Authorised Signature

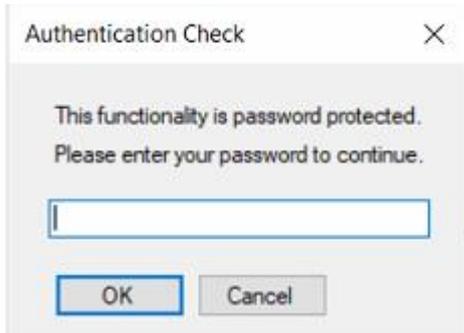
Submit Claims

Close

First, enter the optom signature.

Now click the yellow 'Submit Claims' button.

This will open a password check box to ensure an authorised signatory is submitting the checked claims.

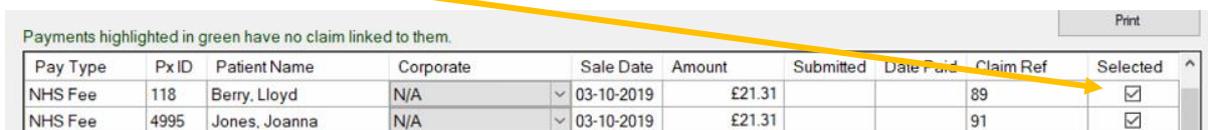


Enter your password and click 'OK'.

Please wait while i-Clarity captures all the required signatures and data, submits it to the PCSE website and waits for a successful response message.

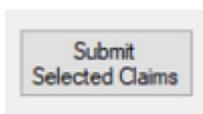
For practices that need it, optometrists can also add their signatures to the claim forms in bulk.

Select the patients from this list that you have seen that day by ticking the box next to the payments

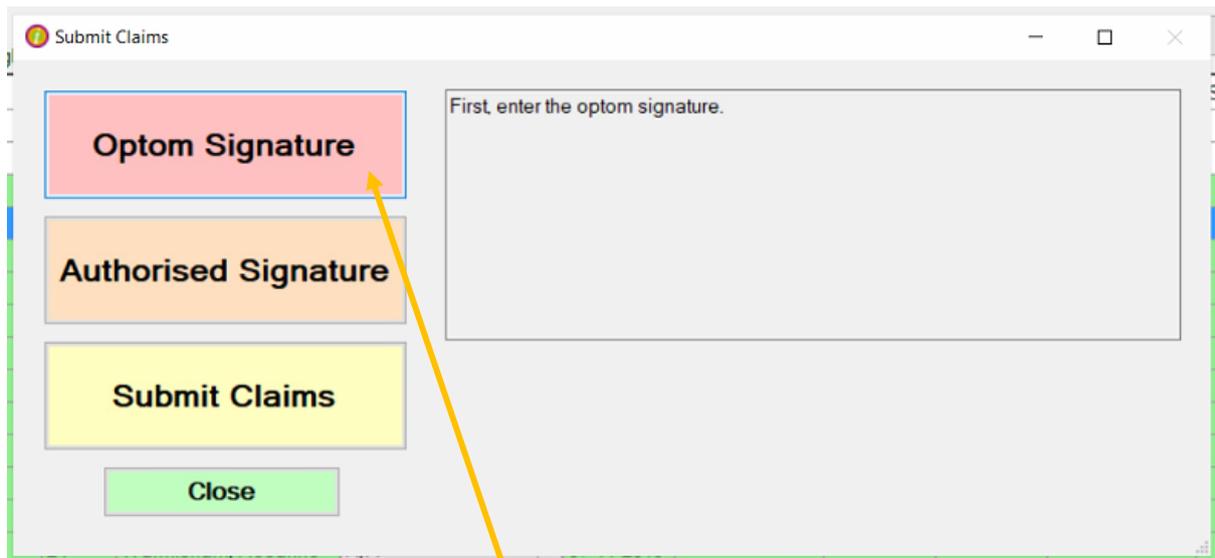
A screenshot of a table with a 'Print' button in the top right corner. A yellow arrow points from the text above to the 'Selected' column of the table. The table has a header row and two data rows. The first data row is highlighted in green.

Pay Type	Px ID	Patient Name	Corporate	Sale Date	Amount	Submitted	Date Paid	Claim Ref	Selected
NHS Fee	118	Berry, Lloyd	N/A	03-10-2019	£21.31			89	<input checked="" type="checkbox"/>
NHS Fee	4995	Jones, Joanna	N/A	03-10-2019	£21.31			91	<input checked="" type="checkbox"/>

Click the button at the bottom of the page 'Submit selected claims'



The submit claims form will open.



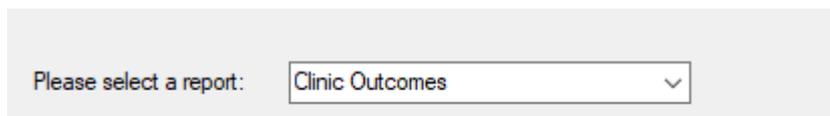
Click on the pink 'Optom Signature' box

Double checking all the NHS sight tests have had a claim submitted.

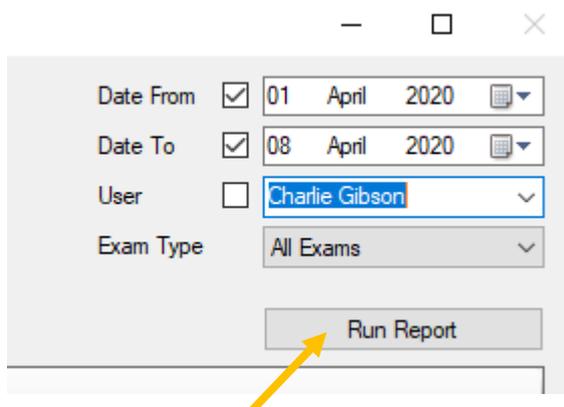
If you would like to double check all NHS sight tests have had a claim submitted, we would recommend using the 'Clinic Outcome' report.

Open the reports module.

Select the 'Clinic Outcome' report from the drop down.



Enter the date range of examinations you would like to check.



Then click 'Run Report'

A list of the clinical record created in this time frame will be displayed in a list.

Please select a report: Exam Type

ID	Patient Name	Age	Exam Date	Type	Optom	Outcome	Ref.	Recall Scheme	Fin.	Com	Specs	Fees	Sub.
6214	Adam Hobbs	75	02/04/2020	RX	eGOS Optom	Unknown	N	12 months	Y	Y	£0.00	£21.31	Y
6215	Andrea Hobbs	60	02/04/2020	RX	eGOS Optom	Unknown	N	12 months	Y	Y	£0.00	£21.31	Y
6216	Bob Hobbs	60	02/04/2020	RX	eGOS Optom	Unknown	N	12 months	Y	Y	£0.00	£21.31	Y
6217	Betty Hobbs	60	03/04/2020	RX	eGOS Optom	Unknown	N	24 months	Y	Y	£0.00	£21.31	Y
6218	Charles Hobbs	54	03/04/2020	RX	eGOS Optom	Unknown	N	12 months	Y	Y	£0.00	£21.31	Y
6219	Chrissy Hobbs	17	03/04/2020	RX	eGOS Optom	Unknown	N	24 months	Y	Y	£0.00	£21.31	Y
6220	David Hobbs	10	03/04/2020	RX	eGOS Optom	Unknown	N	24 months	Y	Y	£0.00	£21.31	N
6221	Dawn Hobbs	32	03/04/2020	RX	eGOS Optom	Unknown	N	24 months	Y	Y	£0.00	£21.31	Y

Any NHS site test will have either a Y or N in the last column titled 'Sub.' (*Submitted*).

Clinical records with a 'Y' have had a claim submitted.

Clinical records with a 'N' have not had a claim submitted.

(Private Examinations will have a 'N/A' in this column.)

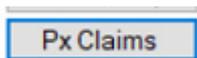
Part 5: Checking Claim Status

The status of your submitted claims can either be checked on the PCSE website or through i-Clarity.

Checking the status of an individual claim.

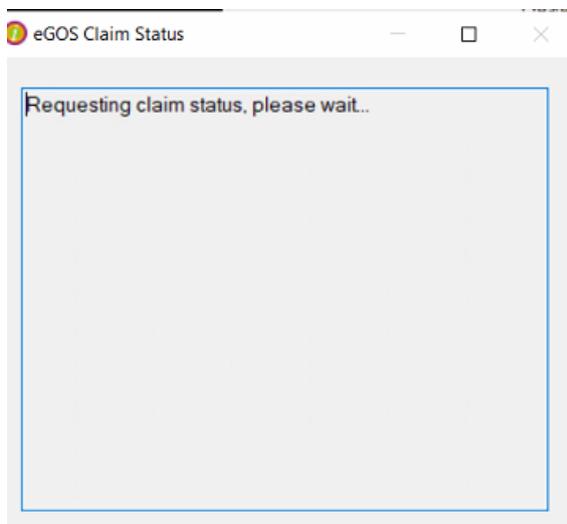
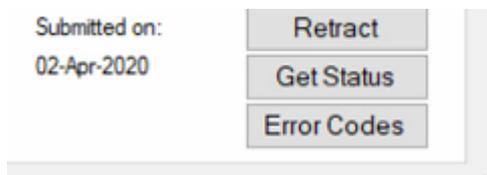
Open the patient record of the claim you would like to check the status of.

Click on the 'Px Claims' button.



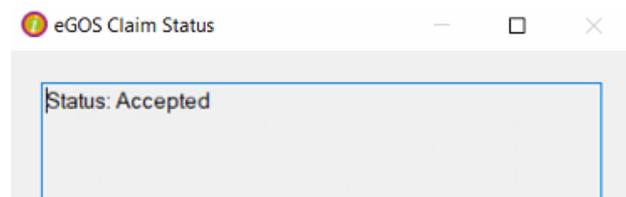
The patient claim will open.

In the bottom right corner click on a button called 'Get Status'

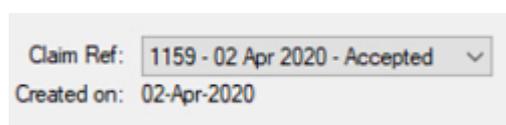
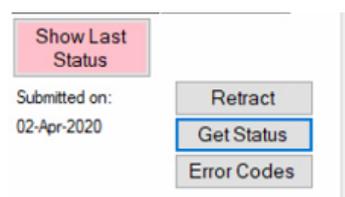


An eGOS Claim Status box will open, please wait while i-Clarity checks the PCSE website for the claim status.

Once the status of the claim has been received it will be displayed in the box.



Once the claim status has been retrieved a button will appear on the claim form called 'Show last status'. This allows you to check the last status received from the PCSE website at any time. i-Clarity will also show the status of the claim next to the claim number at the top of the form.



Checking the status of multiple claims

Open the deferred payments module.

Select the payment status 'Not yet paid, submitted between...' and the payment type 'NHS Fee'

Click Retrieve records

Payment Status

Not yet submitted

Not yet paid, submitted between 06 April 2020 and 07 April 2020

All payments received between 07 March 2020 and 07 April 2020

Filters

Payment Type: NHS Fee

Corporate:

Selected: ALL

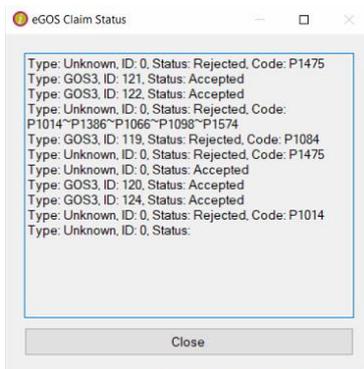
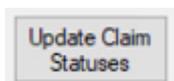
Deselect All

Select All

Save Selection

Retrieve Records

At the bottom of the page click on the button, 'Update Claim Statuses'.



Please wait while i-Clarity checks the PCSE website for the claim status.

Once received the status of the claims will be listed in the box.

Click Close.

The Status of each claim will also be listed against each payment line.

Use the scroll bar along the bottom of the grid of payments to scroll to the right and display the claim status.

Payments highlighted in green have no claim linked to them.

Corporate	Sale Date	Amount	Submitted	Date Paid	Claim Ref	Selected	Status	Status Message
N/A	02-04-2020	£21.31	02-04-2020		1159	<input checked="" type="checkbox"/>	Accepted	
N/A	02-04-2020	£21.31	02-04-2020		1160	<input type="checkbox"/>	Accepted	
N/A	02-04-2020	£21.31	02-04-2020		1161	<input checked="" type="checkbox"/>	Accepted	
N/A	03-04-2020	£21.31	03-04-2020		1162	<input type="checkbox"/>	Accepted	
N/A	03-04-2020	£21.31	03-04-2020		1163	<input type="checkbox"/>	Accepted	
N/A	03-04-2020	£21.31	03-04-2020		1164	<input type="checkbox"/>	Accepted	
N/A	03-04-2020	£21.31	03-04-2020		1166	<input type="checkbox"/>	Accepted	

Rejected Claims

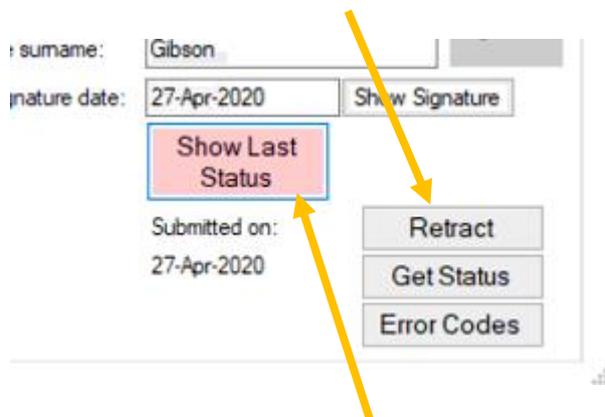
If a claim is rejected claims will also display a status message with the PCSE rejected reason code.

ed	Status	Status Message
	Rejected	P1084
	Rejected	P1084

From the deferred payment module showing the payment status 'Not yet paid, submitted between...' and the list of the payment types 'NHS Fee'.

Double click on the patient name to open the rejected patient claim.

On the claim click the 'retract button'.



The screenshot shows a form with the following fields and buttons:

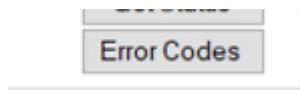
- Surname: Gibson
- Signature date: 27-Apr-2020
- Show Signature button
- Show Last Status button (highlighted with a red box and a yellow arrow pointing to it from the text below)
- Submitted on: 27-Apr-2020
- Retract button (highlighted with a yellow arrow pointing to it from the text below)
- Get Status button
- Error Codes button

This will allow you to edit the claim information

Once the claim has been retracted the payment in deferred payments will be unsubmitted and it will reappear in the deferred payment list 'not yet submitted'.

One the claim you will be able to click on the 'Show last status' button to show the error code from the PCSE.

The meaning of the error codes are listed in i-Clarity. To view the error codes, click on the button 'Error Codes'.



The screenshot shows a button labeled 'Error Codes'.

This will open the 'Business and Validation Error Codes' form.

Business and Validation Error Codes

Search by code: Refresh

Search by text:

Code	Condition	Message
P0003	Patient's first names field contains invalid information	Please ensure the patient's first name field only contains alphabetical characters.
P0004	Patient's surname field contains invalid information	Please ensure the patient's surname name field only contains alphabetical characters.
P0005	Patient's previous surname field contains invalid information	Please ensure the patient's previous surname name field only contains alphabetical characters.
P0006	Patient's address field contains invalid information	Please ensure the patient's address field only contains numbers and alphabetical characters.
P0007	Patient's postcode field is missing information	Please ensure the patient's postcode is provided.
P0008	Patient's postcode field contains invalid information	There is an error in the patient's postcode field. Please ensure the field contains a combination of numbers and alphabetical characters. If a postcode is not available, then put N/A in this field. The following list shows all valid Postcode formats. "A" indicates an alphabetic character and "N" indicates a numeric character. AN NAA - e.g. M1 1AA ANN NAA- e.g. M60 1NW AAN NAA- e.g. CR2 6XH AANN NAA- e.g. DN55 1PT ANA NAA- e.g. W1A 1HQ AANA NAA- e.g. EC1A 1BB
P0009	Patient's date of birth field is missing information	Please complete the patient's date of birth field.
P0010	Patient's date of birth field contains invalid information	Please ensure the patient's date of birth field contains a valid date. The format should be DDMMYYYY.
P0011	The patient's date of birth provided is in the future	Please ensure the patient's date of birth field does not contain a date in the future.
P0012	NHS number field contains invalid information	Please ensure the information provided for the NHS number field is made of 10 digits.

Close

You can either scroll through the list of codes or enter the code in the 'Search by code:' box and then click refresh.

This will then change the display to show the relevant code reason.

Because the claim has been retracted you can make the necessary amendments and then resubmit the claim.

Viewing Previous Claims

If you need to view a previous claim for a patient; open the patient record and click on the 'Px Claims' button.

At the top of the patient claim is a drop-down list titled 'Claim ref'.

Claim Ref: 1159 - 02 Apr 2020 - Accepted ▼

Created on: 02-Apr-2020

Clicking on this drop down will show you all the patients previous claims for that type of form. Selecting a claim ref from the drop-down list will display that claim below.