

Treasurer Sessions – June/July 2021

Overview

Three virtual sessions were held for LOC treasurers to enable networking and share ideas and Katrina Venerus kindly attended all of these to outline the functions of PCSE online, eGOS and answer any queries.

LOC Treasurer Log-in and resetting passwords

- This is a different account to a practice log-in and has been set up in 2 ways:
 - Treasurers with a LOC email address eg. treasurer@durhamloc.co.uk then this is also their username. If the password is reset, a link is sent to the email address and enables the change to be made.
 - Treasurers with a generic email address eg. myname@gmail.com have a username of treasurer@durhamloc.co.uk and security questions are set up during the process of the initial login. If the password is reset, the security questions need to be answered and the password is reset.

Voluntary Levy

It was acknowledged that the change in how the voluntary levy is processed in PCSE-Online and shown on those LOC statements hadn't been communicated clearly to LOC Treasurers.

The voluntary Levy relates to contributions made to the Central Optical Fund and the Eyecare Trust. Contractors decide whether to pay a voluntary levy and this can be updated via the PCSE Online portal.

- **Paper Forms** - in the 'old world', some LOCs received the voluntary levy along with the statutory levy and passed the voluntary levy payment onto the Central Optical Fund and Eyecare Trust. Other LOCs had the voluntary levy taken directly from the contractor, however the voluntary levy amount still appeared on their statements.
- **PCSE-Online** - NHSE has put some governance in place around voluntary levies as the relationship is between the contractor and the Central Optical Fund and/or Eyecare Trust. Therefore, the voluntary levy is always taken direct from the contractor and so doesn't appear on LOC statements. It only appears on contractor statements.

Both the Central Optical Fund and Eyecare Trust can log into PCSE online and retrieve statements showing which contractors have made contributions.

Historically, some LOCs have made the decision to support the two organisations with contributions from LOC finances and promoting them to their wider members. This can still be done, and the relationship maintained.

There is currently a glitch in the PCSE online portal in relation to the voluntary levy with a small number of contractors paying, when they haven't opted in and vice versa, due to errors in data migration. Also, when amending the options, the settings aren't being saved. PCSE are working with the contractors who have raised this issue and if any contractors in your area have the same problem, please let Katrina know.

Number of Levy Payments

Most LOCs are receiving several levy payments in a month rather than just one single payment as per the old paper system.

In PCSE Online, most of the levy will be paid on the LOC's normal payment date each month. However, a number of smaller amounts on different payment dates are likely to be seen. These relate to domiciliary practices, as their claims are now processed at an organisational level and have a single payment date which they choose themselves (from any of the dates they were paid on previously). If the domiciliary provider's chosen payment date doesn't match your LOC payment date, then a separate payment with matching statement will be generated for levy related to any GOS 6s they have submitted for visits to patients in your area.

PCSE Online Statements

To view the full list of practices that have contributed the statutory levy on each statement, click expanded view. This shows the practices by ODS code and the amount they have paid. It is not possible to see practice names on the PCSE Online statement but the full list of ODS codes can be found on the ODS portal found at <https://odsportal.digital.nhs.uk>

Business Continuity and System Development

PCSE have issued [Business Continuity Guidance](#) which sets out what to do if contractors are unable to access PCSE Online.

There is ongoing development work taking place on PCSE Online including a move to a new data centre imminently, which is expected to improve the issue with the late afternoon slow down.

Making the move to PCSE Online

PCSE is contacting those practices who haven't made the move to PCSE Online to see if any support is needed. They will talk contractors through the system, like the webinars last year, but tailor the conversation to the practice.

If any LOCs know any practices who are struggling with the move to PCSE Online, please let them know that PCSE engagement is available – pcse.optomengagement@nhs.net

- **Rejected paper forms** – Katrina noted that PCSE-Online avoids the possibility of rejected forms. Currently the level of rejected paper forms are high and PCSE and suppliers are working to rectify this and NHSE have authorised PCSE to make some upfront payments to help with cashflow.

LOC Issues

- **Payment received, but no statement** - Some LOCs have received payments but no statements or email to provide a way to reconcile the amounts. Some LOCs didn't have a levy deducted from them last year, and so retrospective payments have been made. Katrina will look into these LOCs and follow up to ensure an email is sent to explain the payment.
- **Lancashire & Morecambe Bay** – Practices are highlighted on paper forms, how will this work in PCSE Online? Katrina to follow up.

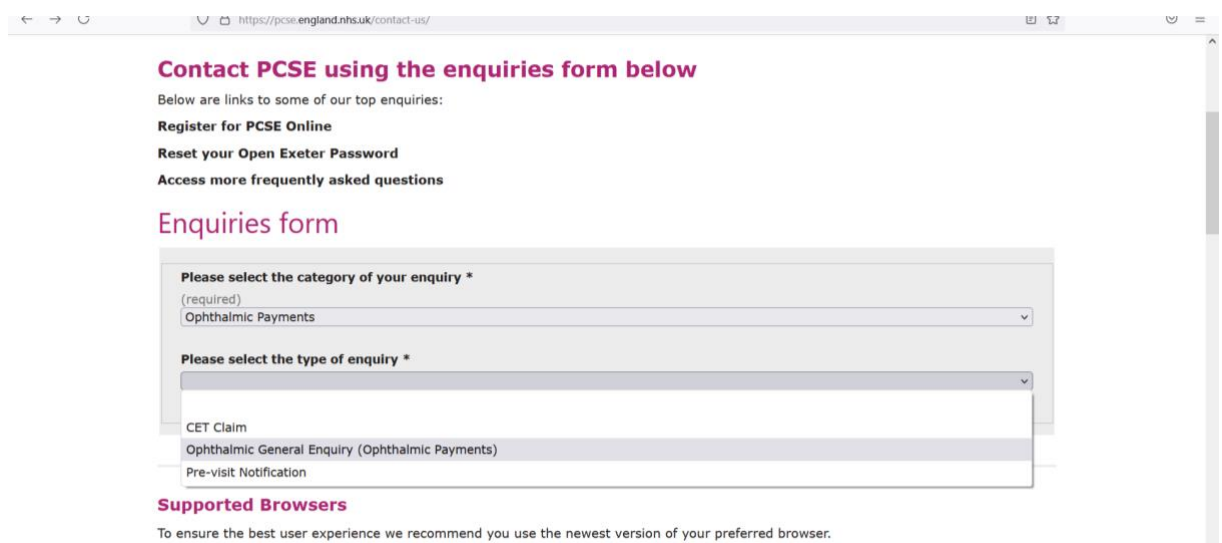
- **Buckinghamshire and Barnet, Enfield, Camden & Haringey** – both Treasurers asked about being able to split the reports into areas, but the system isn't designed to do this, so it's not possible.

PCSE Help

PCSE-Online – Please contact pcse.optomengagement@nhs.net for help with any PCSE online issues and any account issues.

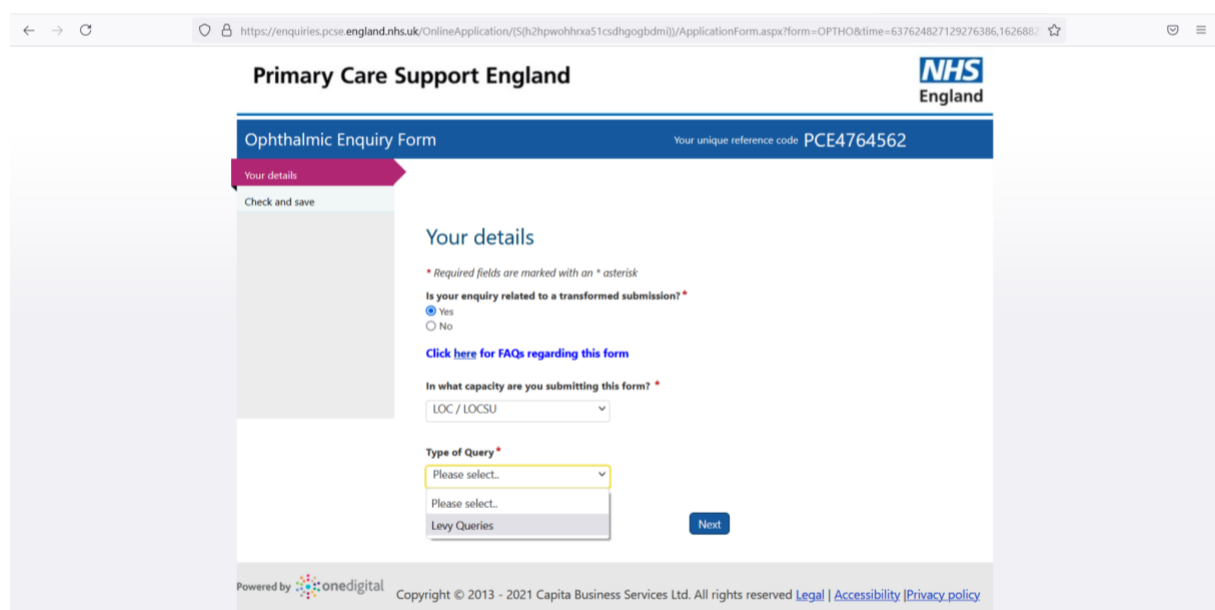
Levy Queries - If there are any queries regarding levy payments, then they should be submitted via the [online enquiry form](#) in the first instance. There is now a dedicated option for LOCs as shown below.

1. Select Ophthalmic Payments and Ophthalmic General Enquiry (Ophthalmic Payments)



The screenshot shows the 'Contact PCSE using the enquiries form below' page. It includes links to 'Register for PCSE Online', 'Reset your Open Exeter Password', and 'Access more frequently asked questions'. The 'Enquiries form' section has two dropdown menus: 'Please select the category of your enquiry *' (with 'Ophthalmic Payments' selected) and 'Please select the type of enquiry *' (with 'Ophthalmic General Enquiry (Ophthalmic Payments)' selected). Below this is a 'Supported Browsers' section with a recommendation to use the newest version of the preferred browser.

2. Click Yes and select LOC/LOCSU and Levy Queries



The screenshot shows the 'Ophthalmic Enquiry Form' with the 'Your details' section highlighted. The form includes a unique reference code 'PCE4764562'. The 'Your details' section contains the following fields and options:

- Is your enquiry related to a transformed submission? ***
 - ☒ Yes
 - ☐ No
- Click here for FAQs regarding this form**
- In what capacity are you submitting this form? ***
 - LOC / LOCSU
- Type of Query ***
 - Please select..
 - Please select..
 - Levy Queries

A 'Next' button is visible at the bottom right of the form. The footer includes 'Powered by onedigital' and copyright information for Capita Business Services Ltd.

3. Enter your details and select your LOC from the dropdown list

A screenshot of a web browser displaying the PCSE enquiry form. The URL in the address bar is [https://enquiries.pcse.england.nhs.uk/OnlineApplication/\(S\(h2hpwohnx51csdhgogbdm\)\)/ApplicationForm.aspx?form=OPTHO&time=637624827129276386,162688](https://enquiries.pcse.england.nhs.uk/OnlineApplication/(S(h2hpwohnx51csdhgogbdm))/ApplicationForm.aspx?form=OPTHO&time=637624827129276386,162688). The form contains the following fields: First name (text input), Last name (text input), Email address (text input), Telephone number (text input), and Local Optical Committee name (dropdown menu). The dropdown menu is open, showing a list of options: Ashton, Leigh & Wigan; Avon; Barnet, Enfield, Camden & Haringey; and Bedfordshire.

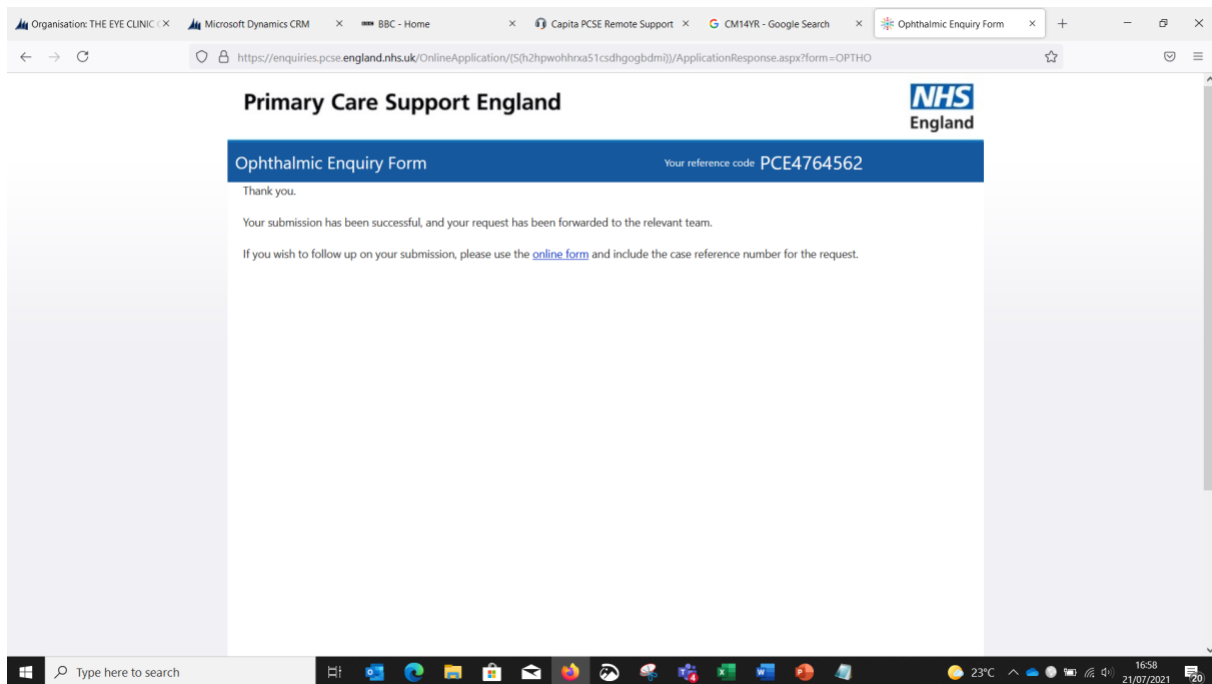
4. Enter the details of your enquiry and click Next – you can attach a document if necessary

A screenshot of the 'Enquiry Details' section of the form. It features a large text area for entering details, highlighted with a yellow border. Below this is a section for uploading documents, titled 'Upload documents if necessary (use the 'Add documents' button to add up to five documents if required)'. It specifies a maximum size of 3.1 MB and lists supported file types: docx, doc, jpg, odt, ods, pdf, png, bmp, gif, rtf, xlsx, xls, txt, and tif. There is a 'Select File' button and a 'No file selected' status. A blue box on the right contains a note: 'Please ensure your documents are the accept size and type.' At the bottom, there is an 'Add document' button and a 'Next' button.

5. Click Submit

A screenshot of the 'Check and save' screen. The page header shows 'Primary Care Support England' and the NHS England logo. The title is 'Ophthalmic Enquiry Form' and the unique reference code is 'PCE4764562'. A progress bar on the left indicates 'Your details' is complete. The main content area says 'Check and save' and includes a warning: 'You will not be emailed a copy of this form as it contains sensitive data.' It instructs the user to 'Review & save a copy of your submission.' and provides a button to generate a PDF copy. A preview of the PDF is shown below, titled 'Ophthalmic Enquiry Form - PCE4764562 (PDF)'. At the bottom, there are 'Back' and 'Submit' buttons.

6. You will see a confirmation message on screen once your enquiry has been successfully submitted



General Discussion points

LOC Continuity

- **Bank Account – additional signatory** It was noted that getting an additional name on the LOC bank account had often been a long and tortuous process, but it is something worth doing to ensure continuity for the LOC.
- **PCSE Online – LOC treasurer account** details have been shared with the Chair so that two members of the committee can access statements. In due course an additional account can be set up if needed.

Altering the LOC levy and / or payment method

NHS England wishes to retain oversight of levy changes which means it is not possible to make these changes on the portal directly. The process was reconfirmed as:

To change your levy and / or payment method, there is a levy alteration form which needs to be completed. This should be sent to your NHS regional team who authorise the change and pass on to PCSE. The form can be downloaded from our website [here](#).

Payments to officers

HMRC guidance makes clear that the posts of chair, vice chair, treasurer and secretary are office holders and therefore the payments they receive for attending meetings etc are subject to the deduction of PAYE and NIC. If the services or the individuals involved are provided by the companies that employ them, then the remuneration can be paid gross to the companies and taxed accordingly as part of the income of the companies. However, when invoicing such remuneration, the companies

are likely to be VAT registered and will have to charge VAT on the remuneration. Other LOC committee members are not deemed to be office holders and can therefore be paid gross for attending meetings etc, but such remuneration needs to be included on their annual tax returns and taxed accordingly as income from self-employment. It is advisable for the LOC to inform LOC members of this in writing.

LOCSU Help and Support

If you need any help or advice on anything Treasurer related or levy related, please contact lisastonham@locsuc.co.uk who can provide support and escalate levy issues with the NHS regional teams and PCSE.

Next steps

LOCSU will continue to facilitate regular virtual meetings for Treasurers to enable networking and sharing of ideas and resources.

The [Treasurer guidance](#) is being regularly updated and if there is anything that you would like to see included or discussed at future Treasurer sessions, please [contact us](#). LOCSU will also be reviewing training for treasurers and will keep you updated on progress.

Contacts:

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