

## eGos submissions using FLEX

The NHS are rolling out paperless submission of GOS1 and GOS3 forms from November 2019, after an initial period of testing in October 2019. FLEX fully integrates with this system. For Optinet to offer you support, you must fulfil the following criteria:

- Have purchased the compliant e-Signature pad or have an Android tablet.
- Have your login details for the PCSE website to hand.

Before starting the setup process, please plug your pad in via USB. The configuration is intended to be 'self-setup', but Optinet can help you with any FLEX-based issues.

Pages 1 and 2 of this document are for initial setup; the rest are for everyday usage.

### System Configuration

In FLEX, click to Menu – Setup – System and choose 'PC Settings'. Once there, choose 'eSignature Pad Configuration'.

Press **Get devices**. Your device should appear in the list as 'Device 1'. Press **Use Selected**.

The **Device Information** should auto-populate. Press **Open Connection**.

Local Device Settings: NACHO-WIN10

Printer Configuration | Zebra Labels | Dymo Labels | PC Settings | Flex Imaging Groups | eSignature Pad Configuration

Devices

Search Mode

IP :

USB

Serial

Get devices

Device 1

Use selected

Device Information

Device Type: Signotec Sigma (Firmware version: 1.22)

Connection Type: Signature device not connected

Serial Number: 2000010935

COM Port: 4

Open connection

Properties

Change Stand By Image: Use branch logo

Backlight: Medium

## Branch Configuration

In FLEX, click to Menu – Setup – Branch. Press update and go to tab ‘Integration’.

Tick **Active**, then enter your **Org. Code**, **Username**, **Password** and **PSK (Pre-Shared Key)** which PCSE have given you. Choose the **eSignature Method** you wish to use using the radio buttons. *You can change this on a claim by claim basis in FLEX if required.*

The screenshot shows the 'Update Branch' dialog box in the Flex application, with the 'Integration' tab selected. The 'eOphthalmic Payments - NHS England' section is highlighted with a red box. This section contains the following fields and options:

- Active:**
- Org. Code:**
- Username:**
- Password:**
- PSK:**
- eSignature Method:** Radio buttons for  Signature Pad,  Mobile App, and  Screen.
- Create GOS1 claim after saving a new ST:**

Other sections visible in the dialog include 'Zeiss Online Ordering', 'OPS', and 'Online Diary'.

In the “Data” tab, check your **Contractor Name**. The Contractor can now sign digitally – this signature will not have to be re-entered. This is shown below. Click on  to add this.

The screenshot shows the 'Update Branch: Branch\_1' dialog box in the Flex application, with the 'Data' tab selected. The 'Contractor Name' field is highlighted with a red box and contains the text 'Optinet Testing'. The 'Contractor Signature' field is also highlighted and contains a signature icon and the text 'Recorded on 23/09/2019'. The dialog shows various settings for Dispense, C/L Orders, Patients, Examinations, and Appointments.

Key fields and settings visible include:

- Contractor Name:** Optinet Testing
- Contractor Code:** 0
- Contractor Signature:** Recorded on 23/09/2019
- Payment Location Code:** 0
- Cyl Format:** As Entered
- Dismiss Time (Auto):** 30 Minutes
- Dismiss Time (Manual):** 30 Minutes
- Default NHS Entitlement:** [Dropdown]
- Automatic Family Search:**
- Order printouts:**  Ask before printing out,  A4,  A5,  Dual A5 (NA to CL)
- Examinations:**  Prompt to enter Recommendations (Saving ST),  Prompt to Confirm Plano (Saving ST),  Prompt to Split Slot after Cancelling Appt
- Appointments:**  Warn if booking NHS appointment early (days) 30,  Prompt to Split Slot after Cancelling Appt,  Display Patient Note Alerts from Arrivals Widget

This document is now for everyday usage.

## Signing for the day

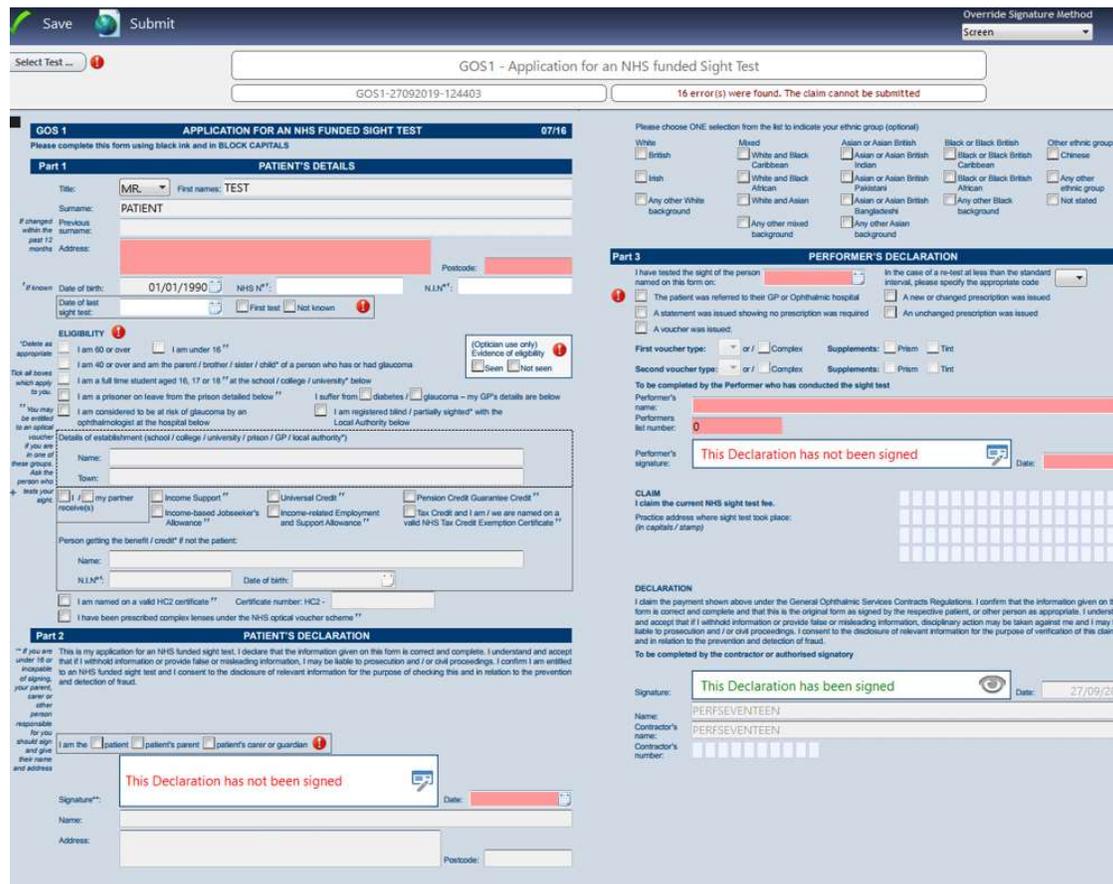


Each Optometrist can sign all forms for the day in one action. In FLEX, click Menu and choose 'Sign for the day'. This will then trigger the chosen eSignature method for entry. Once entered, the signature cannot be entered again that day.

## Creating / Continuing a GOS1 Claim

On the Patient Record, press 'eGos' at the top-right, eGos England, then choose GOS1. There are options for "Create new Claim" or "Continue Claim".

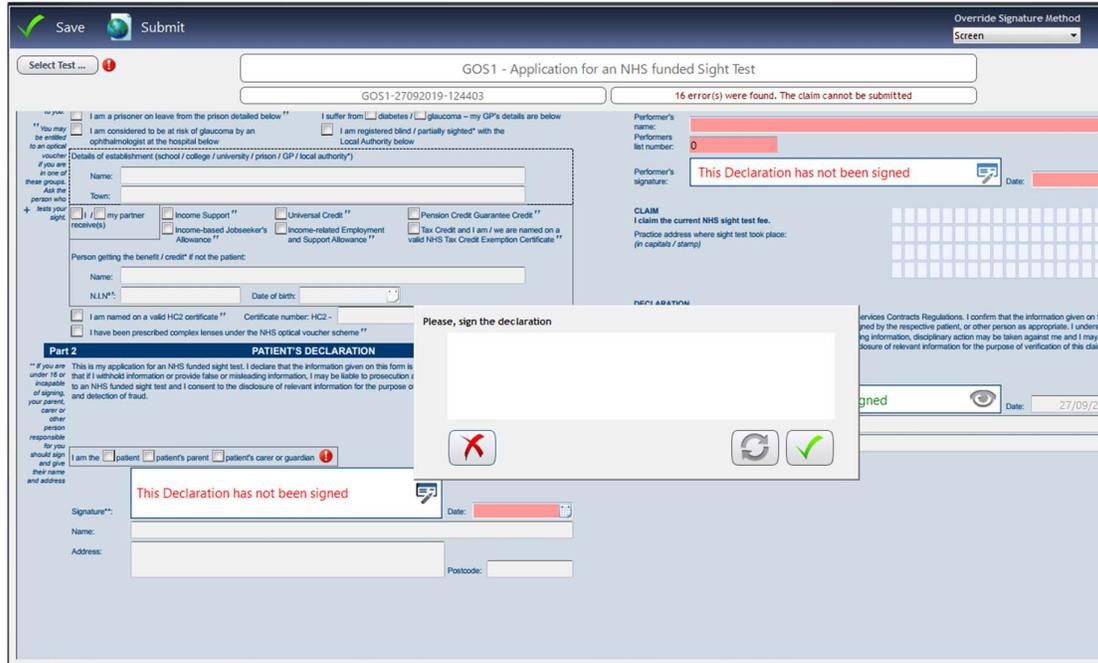
- Choose Create New Claim
- All the information from the Patient and/or Sight Exam is filled out. FLEX will detail any errors which need resolving. You have options to **Select Test...** and also to **Override Signature Method** if you wish to change the input (e.g. for an infirm patient who can't stand at the desk).
- Before the patient signs the declaration, they should check the information is correct on the pad / tablet. If not, you should cancel, update their record and try again.



Three signatures are required

- Patient – press the signature button to trigger the eSignature method.
- Optometrist – see ‘Signing for the day’ above
- Contractor – see ‘Branch Configuration’ on Page 2.

Press  to trigger the relevant method. If using the on-screen method, you will see this:



The screenshot shows the 'GOS1 - Application for an NHS funded Sight Test' form. At the top, there are 'Save' and 'Submit' buttons. The form title is 'GOS1 - Application for an NHS funded Sight Test' with the reference number 'GOS1-27092019-124403'. A message at the top right states '16 error(s) were found. The claim cannot be submitted'. The form contains several sections with checkboxes and text boxes, including 'I am a prisoner on leave from the prison detailed below', 'I suffer from diabetes / glaucoma - my GP's details are below', and 'I am considered to be at risk of glaucoma by an ophthalmologist at the hospital below'. A modal window titled 'Please, sign the declaration' is open, showing a red 'X' and the text 'This Declaration has not been signed'. The modal also has a 'Date' field and a 'Sign' button. The form also shows a 'Sign' button and a 'Date' field.

Sign and press the Green Tick. You can then **Save** or **Submit** the form.

### Continuing a Claim

The functionality for continuing a claim shows the same screen and will also prompt for errors to be resolved. Firstly however, it will ask which claim to continue:

Claims for Px #1 <span style="float: right;">Close</span>					
(Double-click to edit the Claim)					
Ref #	Type	Status	Date		
GOS1-27092019-124403	GOS1	Data Entry In Progress	27/09/2019 12:46:11		
GOS1-27092019-111041	GOS1	Data Entry In Progress	27/09/2019 11:10:41		
GOS1-27092019-110853	GOS1	Data Entry In Progress	27/09/2019 11:08:54		

## Creating / Continuing a GOS3 Claim

On the Patient Record, press 'eGos' at the top-right, eGos England, then choose GOS3. There are options for "Create new Claim" or "Continue Claim" as per GOS1, plus take-away and retrieval of GOS3 which we will look at in a moment.

- Choose Create New Claim
- All the information from the Patient and/or Sight Exam is filled out. FLEX will detail any errors which need resolving. You have options to **Select Test...** and also to **Override Signature Method** if you wish to change the input (e.g. for an infirm patient who can't stand at the desk).
- Before the patient signs the declaration, they should check the information is correct on the pad / tablet. If not, you should cancel, update their record and try again.

The screenshot shows the 'GOS3 - NHS Optical Vouchers' form. At the top, there are 'Save' and 'Submit' buttons, and a 'Select Test...' dropdown. Below this, the form title 'GOS3 - NHS Optical Vouchers' and a reference number 'GOS3-27092019-124659' are visible. A message states '23 errors were found. The claim cannot be submitted'. The form is divided into four parts:

- Part 1: PATIENT'S DETAILS** - Includes fields for Title (MR), First names (TEST), Surname (PATIENT), Address, Date of birth (01/01/1990), and NHS number.
- Part 2: PATIENT'S DECLARATION** - Includes eligibility questions and checkboxes for various benefits like Income Support, Universal Credit, etc.
- Part 3: SUPPLIER'S DECLARATION** - Includes a prescription table, supplier details, and a cost breakdown table. The table shows actual retail cost of glasses/contact lenses as £0.00 + £0.00 = £0.00.
- Part 4: PATIENT'S DECLARATION** - Includes signature fields for the patient and the optometrist. Both fields show 'This Declaration has not been signed'.

Three signatures are required

- o Patient x2 – press the signature button to trigger the eSignature method.
- o Optometrist – see 'Signing for the day' above

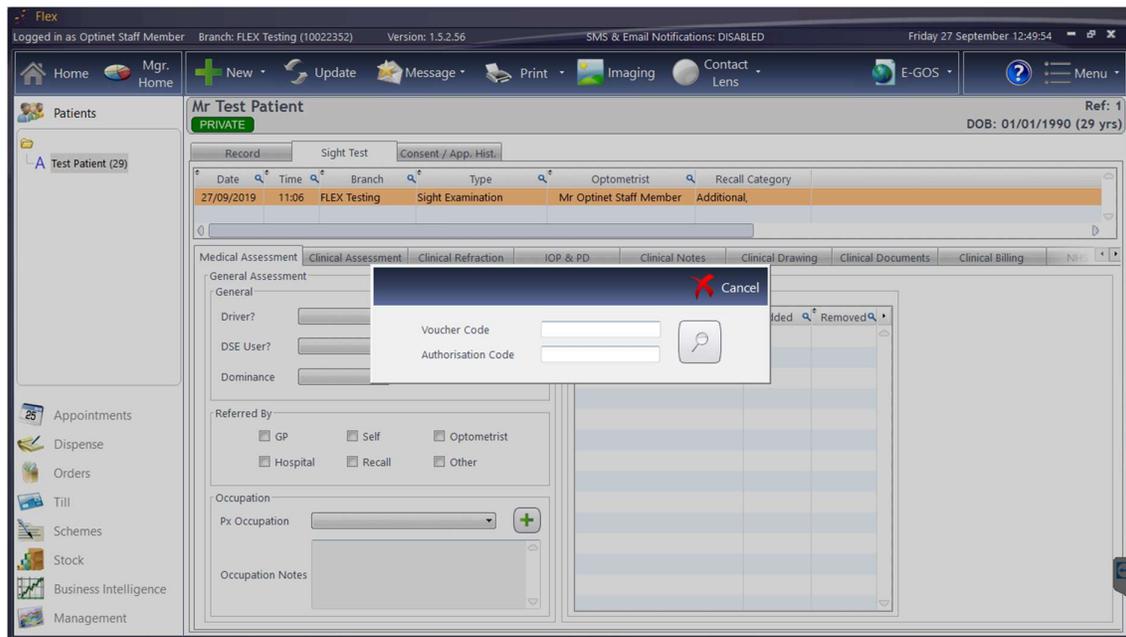
Press  to trigger the relevant method. The **Continue Claim** is the same as the GOS1.

## Take-away GOS3 Voucher

If the patient wishes to have their spectacles dispensed elsewhere, the form that appears is like the full GOS3 above, but there are less fields and there are no patient signatures required. Click E-GOS – GOS3 –Take-away Voucher.

## Retrieve a GOS3 Voucher

If the patient wishes to have their spectacles made up from a test which was not conducted at your practice, click E-GOS – GOS3 – Retrieve Voucher. The screen below is shown, and you can enter the **Voucher Code** and **Authorisation Code**.



## Patient's Claims

Press 'Patient's Claims' to show all claims in progress. This brings up the same box as 'Continue Claim' under the GOS1 and GOS3 option.

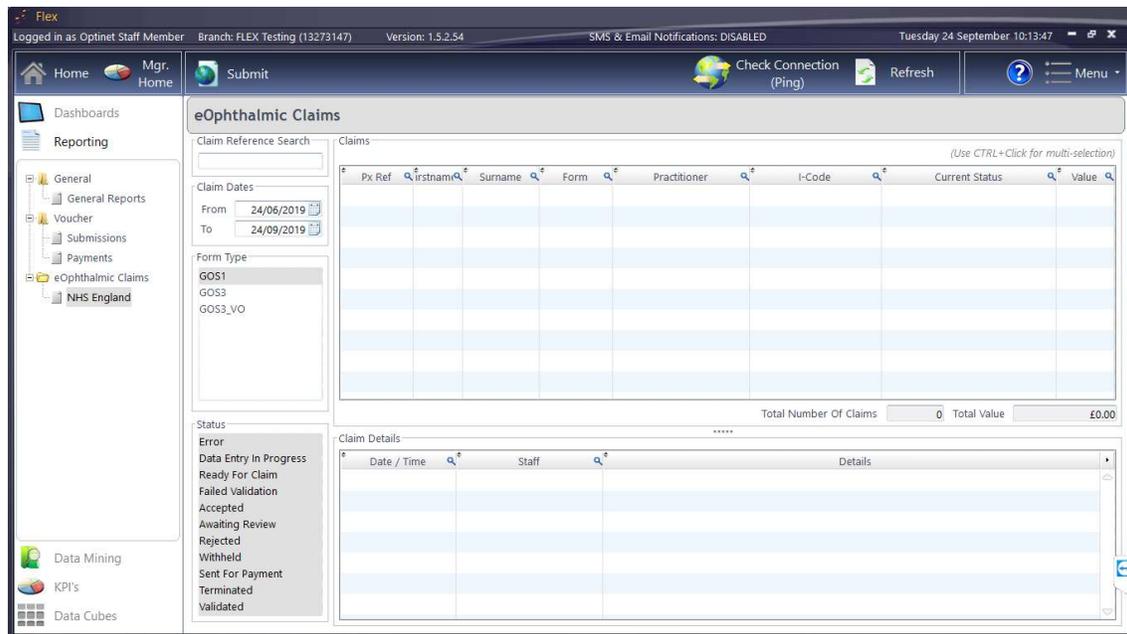
## Patient's Signature

Press 'Patient's Signature' and you can **Send to Capture** to trigger your eSignature method, or **Retrieve Signature** if you have used a tablet to pull the signature into FLEX.

## Viewing Claims

Click to Business Intelligence – Reporting and choose ‘eOphthalmic Claims’.

You can **Check Connection** or **Refresh** this screen using the buttons shown. You can also **Submit** all valid claims.



On this screen you can search for claims based on their reference, the date and Form Type.

The top pane, **Claims** shows all claims matching the above parameters. There is a right-click menu here which gives the following options:



**Go to Px Record** – takes you to the Patient Record

**Submit** – Submits the Claim

**Delete** – Deletes the Claim

**Create GOS3 Claim** – Creates a GOS3

**Create GOS3 Take Away Voucher** – Create a GOS3 to print

The bottom pane, **Claim Details** shows all claims matching the **Status** parameter selected.

There is a right-click menu here which gives the option to “View Details”. If there is an issue, this information can be shared with 1) PCSE or 2) Optinet.

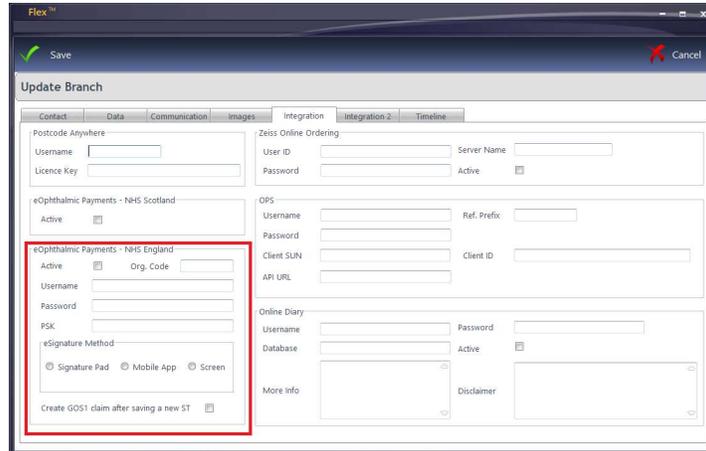
For help with the FLEX-facing content of eGos, please call us on 0800 310 2400 to book a call

For help with anything else, please call PSCE on **0333 330 1346** for assistance.

## **Signing using an Android device**

The patient / performer can sign for their test / the day respectively using an Android phone / tablet if preferred. Practices may also find the mobility of a tablet useful for elderly / infirm patients who may struggle to stand up to the desk where the signature pad is located.

*The app uses an Internet connection, so if you have no / poor Wi-Fi coverage in your practice, we do not recommend this option. If you wish to set this as the main method of signature, navigate to Menu - Setup - Branch - Integrations and choose 'Tablet'. This is shown below.*



The screenshot shows the 'Update Branch' dialog box in the Flex software. The 'Integration' tab is selected. The 'eOphthalmic Payments - NHS England' section is highlighted with a red box. It contains the following fields: 'Active' (checkbox), 'Org. Code' (text), 'Username' (text), 'Password' (text), 'PSK' (text), and 'Signature Method' (dropdown menu). The 'Signature Method' dropdown is currently set to 'Signature Pad'. Other sections visible include 'Postcode Anywhere', 'Zeiss Online Ordering', 'OPS', 'Online Diary', and 'More Info'.

If the signature pad is your preferred method but you wish to change on a claim-by-claim basis, you can change this using the drop-down at the top right-hand corner of the GOS1 / GOS3 claim. This is shown below.



The screenshot shows the 'Override Signature Method' dialog box. It features a dropdown menu with 'Screen' selected. A red box highlights the dropdown menu. A 'Cancel' button is visible on the right side of the dialog.

To set up the app, please visit [optinetuk.net](http://optinetuk.net) on your **Android device** and choose 'eGosAndroidAPK'. Please allow permissions and install the app. It will require your FLEX License Number. This is in the top bar of FLEX and is eight characters - it will look like this: (10001234).



Once the above have been completed and you have the App open, when requesting a signature, FLEX will populate the app with Px information which can be confirmed, and the signature can then be entered and pulled into FLEX.