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.

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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*.

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🛇 Signature Pad 🖉 Mobile App 🔘 Screen		
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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.

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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.

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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 ${ar >}$ to trigger the relevant method. If using the on-screen method, you will see this:

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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:

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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.

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Three signatures are required

- Patient x2 press the signature button to trigger the eSignature method.
- 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**.

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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.

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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:

2	Go to Px Record	Go to Px Record – takes you to the Patient Record
	Submit	Submit – Submits the Claim
-	Delete	Delete – Deletes the Claim
0	Create GOS3 Claim	Create GOS3 Claim – Creates a GOS3
0	Create GOS3 Take Away Voucher	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 <u>0333 330 1346</u> 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.

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eSignature Method	Database		Active	
C Signature Pad C Mobile App C Screen				
	More Info		Disclaimer	

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.



To set up the app, please visit <u>optinetuk.net</u> **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.