## Contents



## What's changing

**Q: Why is GP Payments and Pensions moving to PCSE Online?**
**A:** PCSE Online will be used to calculate and administer practice payments as well as administer GP pensions. This solution is part of the overall project to decommission NHAIS, providing a more modern and adaptable platform.

**Q: When does the system go live?**
**A:** 1st June 2021

**Q: Will there be dual running of both PCSE Online and Open Exeter?**
**A:** No, NHAIS will no longer be used to calculate practice payments or administer GP pensions. Any current data feeds into Open Exeter will feed into PCSE Online from 1st June to avoid the risk of duplicated payments.

**Q: When will Open Exeter completely turn off?**
**A:** This change only applies to GP Payments functionality, which is moving from Open Exeter to PCSE Online 1st June 2021. Historically NHAIS (or Exeter) has served as the payment engine with Open Exeter being a web-based interface. PCSE Online will become the payment engine and, as it is web-based, it will also serve as the interface. Open Exeter will remain until all services have migrated to other systems and platforms.

**Q: Is this update going to replace the PCSE enquiry form?**
**A:** No the enquiry forms will remain, however the system will provide more transparency either reducing the need to contact PCSE or by helping to make the first contact more meaningful

**Q: Will the new system enable payments to be made direct to a PCN rather than to an individual practice which is currently what happens with some Network DES funding**
**A:** Not from launch but discussions are underway to make this available in a future update

**Q: Will all historical documents be available in PCSE Online?**
**A:** Statements and Pensions information from the past six whole years, plus the current year to date, will be migrated to PCSE Online from Open Exeter and NHAIS.

**Q: What will show on Open Exeter and why is this still needed?**
**A:** Open Exeter will remain for nurses to see Cytology information and any other processes you complete today that are not GP Payments and Statements related.

**Q: Where can I access the guides?**
**A:** On the PCSE Website. Go to services and choose either GP Payments or GP Pensions. Choose the tile that's relevant to you and all related guides will be found on individual pages.

## Getting access

**Q: Where do we log in?**
**A:** Go to pcse.england.nhs.uk and click log in

**Q: Do I need an N3 connection to access PCSE Online?**
**A:** No, PCSE Online is a secure web based system that uses encrypted communications. Access to PCSE Online is controlled through Role Based Access Control and these roles are both assigned and managed by a super user within the practice.

**Q: What is a PCSE Online super user?**

**A:** A ‘super user’ or ‘user administrator is the person at the practice who has the GPP User Management role. PCSE has been in touch with these individuals and will set up the first GP Payments and Pensions user administrator for each practice, writing to the main contact at each practice 24th May to advise who this is. From 1st June the super user can give other users the GPP User Management role and create more super users within the practice.

**Q: Why do I only have the Performers List, Medical Records and Supplies roles currently showing?**
**A:** The new roles will only be visible from 1st June 2021

**Q: Why don't I currently have the option to assign Medical Records, Supplies and Performers List roles?**
**A:** You are not the user administrator at your practice for these services. If you believe this is incorrect, contact our user registration team pcse.userregistration@nhs.net

**Q: Can the User Management role be given to the Practice Manager who might also have several other roles within PCSE Online?**
**A:** Yes one user can be the user administrator or super user for Medical Records and Supplies as well as Performers List and GP Payments and Pensions.

**Q: Can someone have the user administrator role and also have all the other roles**?
**A:** Yes. The user administrator will decide who is given which roles, this includes themselves.

**Q: Can more than one person be allocated to create new user accounts?**
**A:** Yes you can have up to four user administrators

**Q: Will we be able to give access to our accountant for the purposes of uploading GP Pension forms?**
**A:** There is an **Accountant** role for you to give access to an accountant to view and complete end of year pensions admin, however the GP or Practice will need to click the submit button.

**Q: I am a new Practice Manager, who do I contact to check who the super user is?**
**A:** Contact PCSE’s user registration team pcse.userregistration@nhs.net

**Q: Does the User Administrator need to create accounts for each salaried GP in the practice?**
**A:** No, all GPs already have PCSE Online accounts due to the Performers List. GPs with active assignments on the Performers List will be given the roles they need for the practice they are linked to. This includes both Salaried and Principal GPs.

**Q: What is the process for a GP to activate their account and link themselves to the practice?**
**A:** If the GP isn’t linked to the practice they are working at then they have not updated the Performers List. They need to log in to PCSE Online, click Performers List and update their details. After they have done this, users at the practice with the **PL Practice Manager** role will be asked to review and confirm the change.
If a GP cannot remember their PCSE Online password, they can go to https://pcse.england.nhs.uk/ and click log in. Follow the ‘forgot password’ instructions. The GP’s username is their GMC registered email address.

**Q: Can you get a list of all users for your practice?**
**A:** PCSE can see all users set up for your practice. You can also search for individual users at the practices to see what roles they already have. There is a change planned for 2021 for user administrators to be able to see a summary of all users at the practice.

**Q: Will PCN business managers have access to the PCN "Organisation" or is this just for practices at present?**
**A:** Not from launch. The PCN hierarchy doesn’t yet exist for access so access is granted on a practice by practice basis. Users can be given roles at multiple practices.

**Q: When assigning roles, does it drop down so you can check permissions you are giving?**
**A:** When creating or updating a PCSE Online user account, there is a table that lists all the roles you can assign. Tick the box next to the role and click create/update to assign the role.

**Q: I’m trying to create a new user. When filling in their email address under 'user name' it tells me to provide a different user name, why is this happening?**
**A:** The user will already have a PCSE Online account. Go back to the User Management home page and search for them using the email address. You can add additional roles to their existing account.

**Q: Is there details of what each role does to make an informed decision on what they should and should not have?**
A: Yes, see the User Management guide.

**Q: Do we need to add GPs who are no longer part of NHS pension scheme i.e. have opted out or retired?**
**A:** You do not need to add any GPs. They have existing accounts and their new GP Pensions and Payments roles will be added automatically.

**Q: What should we do if a user administrator is on long term sick leave - how do we manage access for a temporary manager?**
**A:** Contact PCSE.UserRegistration@nhs.net. The team will need to do a series of security checks before setting up a new user administrator.

## Pensions

**Q: If GPs are automatically being given access, what about non-GP partners who need to access the pensions screens?**
**A:** Non-GP partners are not given roles automatically as they aren't on the performers list, however your practice user administrator for GP Payments and Pensions can give them the **Non-GP partner** role from 1st June.

**Q: Can Practice Managers view employee contribution statements?**
**A:** This is determined by the roles, it is the responsibility of the user administrator to assign management with the appropriate roles. The **GPP – Statements** role will give the user the access to view contribution statements along with practice statements.

## Statements and Claims

**Q: Will we be able to print out copies of our statements for accountants?**
**A:** Yes. PCSE Online statements are easily exported, either as a PDF or CSV, and either as an 'expanded' detailed statement or a 'collapsed' summary. Once exported they can be printed. 6 whole years of Open Exeter statements, plus the statements year to date, are being migrated to PCSE Online

**Q: Am I able to download statements from PCSE Online and upload them to accountancy packages?**
A: Statements can be downloaded as CSV files. You may need to save the CSV as a different file type (save as, change the file type, save) to be compatible with external software.

**Q: If I need to query a statement can this be done in PCSE Online?**
**A:** No PCSE Online is how you view the statements, any queries about the statement either need to be raised with your commissioner (CCG or NHS England) or the PCSE team by either calling the Customer Support Centre or raising a case through the enquiries form on our website.

**Q: Can you see a list of the pay codes and what they mean?**
**A:** Commissioners have a source document explaining all the active paycodes. Practice statements list all payment amounts along with the paycode as well as a description of the paycode.

**Q: If submitting a claim eg locum claims can we upload required invoices to support the claim?**
A: Yes you are required to upload evidence for claims, so a bill or an invoice would be suitable for this.

**Q: Will we still be able to claim via email or will there be a period when both are allowed ?**
A: Claims can be managed outside of the claims process yes. Your CCG or NHS England regional team will advise you when they would like you to start submitting claims using PCSE Online

**Q: Have you worked through the coding of when a practice uses the claims portal? For example, Water claim rates claims can get coded to 3 different paycodes depending on whether the practice is GMS, APMS or PMS.**
A: Yes paycodes are determined by claim type and contract type. The practice will choose the claim type and behind the scenes PCSE Online will look at the contract type and assign the correct paycode.

**Q: What claim types can be submitted using PCSE Online?**
**A:** Cost rents and LA Economic rents, Health Centre rent, Health Centre rates, Premises service charge, Water rates, Non-domestic rates, Actual rents, Disposal of clinical waste, Matts claims and Locum cover costs. Anything outside of this is dealt with outside of the Claims process in PCSE Online.

**Q: If we are sending copy invoices for something that is already being paid for automatically, do we still do it this way although we are not claiming, just providing evidence?**
A: Yes, continue as you do today until told otherwise. The payment will have been set up as a recurring adjustment and these existing arrangements will transfer over to PCSE online.

**Q: Will previous claims that we have recently emailed be shown in this list?**
A: They won't show as a 'Claim' unless it was submitted as a claim using PCSE Online, however you will still be paid and the item will appear on your statement

**Q: Is there a restriction on what file types and the size of the file that can be uploaded?**
**A:** Yes but a wide range of file types are accepted. The maximum file size is 3.2MB. PCSE Online will tell you if a file is incompatible or too large.

**Q: What is the timescale from submission of a claim to approval and notification to the practice please**
A: Commissioners are notified immediately but will let you know timescales for approval once the Claims process is in use and embedded.

**Q: Is the 'notification' - an email sent to us informing of payment?**
A: Yes, notifications are both emails and a message inside PCSE Online once you've logged in

**Q: Does the Claims process save practice or CCG time?**
A: The claim cannot be submitted without all mandatory information, reducing any errors and chasers. The end to end process is shorter as the claim is added to the payment run once approved and does not require PCSE staff to be involved.

## Joiners and Leavers

**Q: How do we notify you of historic joiners or leavers from before this new system is live?**
**A:** Submit the joiner or leaver form using PCSE Online and the contributions will be backdated to the beginning of the financial year. The leavers form can be completed and submitted at any time, but for joiners the GP must have completed their performers list change first. For any joiners or leavers prior to the current financial year you will need to contact PCSE to apply a further manual adjustment.

**Q: If a GP opts out of the NHS pension scheme and then wants to restart pension at a later date, what process will they or the practice need to do?**
**A:** Users with the **GP Principal** or **Non-GP Partner** role at the practice can opt GPs back into the pensions scheme. Once completed users with the **Joiners & Leavers** role can complete a Joiner form to restart the Pension contributions

**Q: We have a salaried GP leaving the NHS pension scheme but not leaving the Practice, would i still use the Leavers form?**
**A:** No, the leavers form is to stop Pensions contributions being taken from your practice for GPs who have left the practice but have remained in the NHS Pension scheme. The Opt out process should be followed by the GP for this scenario, once opted out then contributions will stop. GPs have an Opt out tile when they log in to PCSE online.

**Q: Can you clarify the terms 'GP' or 'NON GP' on the joiners screen?**
**A:** Non-GP refers to non-GP Partners. A common example of this is a Practice Manager who is a Partner.

**Q: Will we still need to complete the estimate of pensionable profit form when GP leaves or joins the practice?**
**A:** Estimates are required annually but should be updated after any changes to pensionable profits or earnings to ensure that the correct contributions are being paid throughout the year. The most recent submitted Annual Estimate will be visible and editable in PCSE Online. After any personnel changes, review the estimate and update if needed. Example, a Principal GP leaving the practice may have impacts on the remaining Partner profits and earnings.

**Q: Is there a way to show which GPs are linked to our practices?**
**A:** The Performers List website has the facility to search by practice and see all GPs currently linked to the practice. The website is updated in real time after changes have been submitted and approved
https://secure.pcse.england.nhs.uk/PerformersLists/

**Q: Our accountant normally completes and submits the estimates, will they be able to continue to do this?**
**A:** It will remain the responsibility of the practice to submit their estimates. It is possible to give your accountant the Estimates role to do this on your behalf.

**Q: If you change an estimate does PCSE take into account the annual figures paid to date?**
**A:** The estimate form sets the monthly contributions going forwards. The contribution tier rate has to be selected from a drop down list. If the change in earnings for the remainder of the year impacts the tier rate this must be changed. Any contributions paid to date will be pulled through to the Annual Certificate or Self-Assessment form at year end.

**Q: Individual estimates, does this mean we estimate the GP salary but then they add any other locum work done elsewhere?**
**A:** Individual Estimate allows for all earnings to be declared by the GP themselves - including salaried, locum and solo work earnings. This can be captured on the main Estimate however if the GP wants to keep their locum and solo earnings private, but still have their locum and solo figures counted for accuracy, they complete an Individual Estimate and tick the box to hide the locum and solo earnings from view.

## Locum A & B

**Q: Do locums know about this, or do we need to let them know?**
**A:** Locums have the option to continue using 'offline' versions of Locum A forms, however using PCSE Online for both Locum A & B forms means they'll have a clear audit trail and know how much they need to pay each month. We will be encouraging uptake; however it would also be helpful to raise awareness.

**Q: Is the process for submitting locum reimbursement claims or do we do this on the previous making claims process?**
**A:** Locum A and B processes are only for Pensions admin and are not related to invoicing or reimbursement of locum cover costs

## Other

**Q: Why don't Practice Managers submit Performers List changes on behalf of the GP?**
**A:** It remains the responsibility of the GP to keep the Performers List entry to date to ensure they can work in England. The user at the practice with the **PL Practice Manager role** is involved in the approval of changes which involve the practice. The Practice Manager cannot initiate the change.

**Q: How quickly after the performers list update does the GP then link to the practice?**
**A:** It is dependent on everyone completing their actions e.g. for Principal GPs; the GP submits the change, the practice approves, the CCG approves. The change is reflected in PCSE Online straight away.

**Q: How do I get help using PCSE Online?**
**A:** Check the PCSE Website first. The website had guides and links to other resources which may help to resolve your query. If you don't find the answer to your question you can call the PCSE Customer Support Centre on 0333 014 2884

**Q: When you call PCSE now the operator just emails whatever the query to whatever department and it takes time for a response. Will they be able to answer questions about this over the phone?**
**A:** The Customer Support Centre is the frontline team who can resolve simple queries. They are responsible for any queries relating to Open Exeter, PCSE Online, Supplies and will soon take responsibility of User Registration and User Management. For more complex queries they create a case and assign this to the specialist service line teams.

**Q: Where can we see communication sent to practices about GP Payments and Pensions in PCSE Online?**

**21 April bulletin to GP Practices**
**30 April bulletin to GP Practices**
**24 May bulletin to GP Practices**

**Q: When will user names and system access details will be shared**?

**A:** All user accounts will be set up when the system is live, not before. If it's a new PCSE Online account, users will be sent an email asking them to click a link to verify their email and set up a password. If it's an existing PCSE Online account with new roles, the user will be sent a notification to advise them they've been given additional roles.

**Q: When the monthly payment schedule is uploaded onto the new payment system by someone at the CCG with the Data Entry role, how does this get to someone with an Approver role?**

**A:** Data Entry submissions feed through to Approvers in the same organisation. There are two roles in the system, Data Entry – which is the first tier of approval, and Approver – which is the second and final tier of approval. Data Entry person has a 'submit' button, Approver has to choose either Approve, Reject or Delete from a drop down list. There's a guide here if you'd like to see how it works. Roles have already been agreed for each CCG and are ready to be set up 1st June. **Note** – those with the Approver role can do both the Data Entry and Approval activities if needed.

**Q: How will NHS England will be able to access the quarterly GP List size data?**

**A:** List size data will issued to commissioners the same way it is today, it will just be that it comes from PCSE Online and not NHAIS.

**Q: How does a practice portal link into the CCG – what tells the system whom to notify that a claim has been submitted?**

**A:** All organisations in the system are either a 'parent' or 'child' of another organisation, to control who needs to approve what. Everyone with the Data Entry role within the CCG will receive an email notification whenever there's an activity within their organisation 'family' that requires review or approval.

**Q: Can the notifications be sent to a generic e-mail address?**

A: Not at present. Notifications are sent user's email addresses and we have advised against using shared mailboxes for user accounts - as this would create a shared login that undermines the role-based access control.

**Q: How do validators map to approvers e.g. once a claim is validated, how is the approver selected?**

**A:** After validation, users with the Approver role can complete the second tier of review and approval. As with the Data Entry role all users in the organisation with the Approver role will be notified.

**Q: Once a claim is approved what happens then – does it link to NHAIS/SBS automatically?**

**A:** PCSE Online is replacing NHAIS for GP Payments. Completing the claim in PCSE Online is the equivalent of inputting it straight into NHAIS. Meaning after approval the payment is added to the next payment run.

**Q: Can we track which users have completed which actions?**

**A:** PCSE can see a full audit trail of which user accounts have completed which actions. This is not currently available to external parties.

**Q: Is there the capability to pull reports for specific items i.e. for SFE locum costs for a specific GP and see historical payments?**

**A:** Not at launch for external users. Reporting is currently an internal PCSE function.