ary Care Support England

Submitting Adjustments

Version V2.0 - 29th June 2022



Primary Care Support England

Introduction

GP Payments administration is now managed through PCSE Online.

You can now create, upload and submit your monthly payment schedules through the adjustments section of PCSE online. Once submitted, a notification will be sent to an advisor in our payments team who will include these amounts in the practices contractual payment.

You can use the CSV file / Adjustment screens in PCSE Online to:

- Create claims
- Create adhoc revisions to a practices PMS baseline as i.e. from the current month onwards.

If you require a monthly recurring or regular payment/s to be stopped, Click <u>here</u> to download the stop payment instructions and email template. Then send the details to: <u>pcse.payments@nhs.net.</u>

Whether you are submitting an adjustment for a practice's enhanced service or some additional service that has been agreed with your office, managing monthly contract schedule payments through PCSE Online is quicker, easier to track, and secure.

Contents

If there is a specific section in this guide that you would like to see, please **click** one of the icons below to be taken straight to that section.





Adjustments - Video Overview

Lets take a first look at the Adjustment screen within PCSE Online.

Click on the Play button below to see an overview of the adjustment screens within PCSE Online.



Adjustment Screen Overview

1m 59s Click to play the video

Search for an existing adjustment (Monthly Contract Schedule)

To view existing contract schedule adjustments, first you need to:

- Log in to PCSE Online
- Click GP Payments
- Choose Payments
- Click Adjustments

You will now be in the **Adjustments** screen (see right)

Click on the magnifying glass icons to see more information.

| Home > Adjustments | | | | | |
|-----------------------------------|--------------------------------------|------------------|---|-------------------------|---------------------------|
| Adjustments | | | | | |
| ADJUSTMENT BATCH REFERENCE | NUMBER OR NA | ME | REQUESTING ORGANI | SATION NAME OR CO | DE |
| Adjustment Batch Reference Number | r Or Name | | NHS England South Ea | st (Kent, Surrey and Su | issex) |
| CREATED BY | | AMOUNT FROM | | AMOUNT TO | |
| Created By | | | Amount From | | Amoun |
| CREATION DATE FROM | | CREATION DATE TO | | STATUS | |
| dd/mm/yyyy | | dd/mm/yyyy | | Please select | |
| | | | | | |
| | | | | | Clear Search Search |
| View all individual adjustments | | | | | New Adjustme |
| Adjustment | th Payment lines in Batch | Amount (£) | Requesting Corganisation | Created By \$ | Creation - Status Date |
| 202070000043 UAT_ADJ_Task_0 | 334 11 | 148,873.68 | NHS England South East (Kent, Surrey and Sussex) | RLT DataEntry | 08/07/2020 Draft |
| | | | NHS England South East | | |

To create a new adjustment, first you need to:

- Log in to PCSE Online
- Click GP Payments
- Choose Payments
- Click Adjustments
- Click New adjustment under the search criteria.

Click on the magnifying glass icons to see how this is done.

| PCSE Online | NH Engla |
|--|--|
| HOME GP PAYMENTS HELP | |
| Home > Adjustments > Adjustment Batch > | |
| | |
| Adjustment Batch | |
| Adjustment Batch | |
| Adjustment Batch BATCH INFORMATION ADJUSTMENT BATCH REFERENCE NUMBER | ADJUSTMENT BATCH STATUS |
| Adjustment Batch BATCH INFORMATION ADJUSTMENT BATCH REFERENCE NUMBER | ADJUSTMENT BATCH STATUS Draft |
| Adjustment Batch BATCH INFORMATION ADJUSTMENT BATCH REFERENCE NUMBER ADJUSTMENT BATCH NAME | ADJUSTMENT BATCH STATUS Draft REQUESTING ORGANISATION NAME OR CODE |



Once you have saved your ADJUSTMENT BATCH NAME, an ADJUSTMENT BATCH REFERNCE NUMBER will be populated and red text will appear stating:

"For new changes to apply to Adjustment Batch. Please click on Update."

The update button (Green) can be found to the right of the screen under the **BATCH INFORMATION.**

Click on the magnifying glass icons to see how this is done and then click **Next**.

Adjustment Batch

| ADJUSTMENT BATCH REFERENCE NUMB | ER | ADJUSTMENT BATCH ST | ATUS | |
|---------------------------------|------------------------|-----------------------|-------------------------|---------------------|
| 202090000166 | | Draft | | |
| ADJUSTMENT BATCH NAME | | REQUESTING ORGANISA | TION NAME OR CODE | |
| Adjustment_test_11 | | NHS GLOUCESTERSHIR | E CCG | |
| | | | | Update |
| CONTRACTOR CODE OR NAME | AMOUNTFROM | | AMOUNT TO | |
| Contractor Code or Name | | Amount From | | Amount F |
| PAYMENT TYPE | PAYMENT DATE FROM | | PAYMENT DATE TO | |
| Payment Type | dd/mm/yyyy | | dd/mm/yyyy | |
| | | | | Search |
| Upload Bulk Adjustments | | Enter Bulk Adjustment | Bulk Adjustment Request | CSV Upload Reque |
| | Commissioner & Payment | C Amount C Payment | © Payment © | Description © Activ |



Keep in mind the importance of aligning the correct GMS/ PMS code to the right practice contract type.

PMS and GMS have different pay codes associated. i.e. if you choose a PMS payment type that isn't compatible with GMS, the upload will reject as an error/mismatch

Please note that when you are uploading the contract variation file via PCSE Online, uploads may take up to an hour depending on the number of commissioners loading at that time and the size of the files, but it should only take this time on rare occasions.

Click on the magnifying glass icons to see how this is done and then click **Next**.

| For new changes to apply to Adjustment Batch. Pi | ease click on Update. | | | Update |
|--|--------------------------------|---|---------------------------|--------------------|
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| Contractor Code or Name | | Amount From | | Amount To |
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| Upload Bulk Adjustments Choose File No file chosen Contractor Contractor Contractor Code | Commissioner © Payment Type | Enter Bulk Adjustmen Amount O Paym (E) Mont | t Bulk Adjustment Request | CSV Upload Request |
| Upload Bulk Adjustments Choose File No file chosen Contractor Code Contractor Code | Commissioner © Payment Type | Enter Bulk Adjustmen Amount O Paym (E) Mont | t Bulk Adjustment Request | CSV Upload Request |



A pop up window will appear saying:

CSV Upload Confirmation CSV Submitted for processing.

CSV Upload Confirmation

CSV Upload submitted for processing.

Click **OK** on this box when ready.

Click on the magnifying glass icons to see how this is done and then click **Next**.

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|-----------|
| |
| sv |
| Ok |
| © Descrip |
| |

Click on the magnifying glass icons to seem more information.

You can upload numerous different contract variation CSV files here. Once you have uploaded a file, we would recommend that you navigate to the bottom of the page and click **Save for** Later.

Once you are happy with the contract variation you have uploaded, you can scroll to the bottom of the screen and either Save for Later (We would recommend saving the form after every upload) to the bottom or you can click Submit and the monthly payment schedules will be adjusted from the date specified.

Save for Later

| Upload I | BUIK Adju | suments | J | | | | | Enter Bulk A | qu | astment | 80 | k Adjustmen | t Request | C.S | v upioad Requ |
|-------------------|------------------------|--------------------------------|---|---|---------------------------------------|-----------------------------------|---|--------------|----|------------------|-----|-------------------|---|----------|---------------|
| Choose | File No | file chose | n | | * | | | | | | | | | | |
| ontractor Code | * Cont Nam | ractor e | 0 | Commissioner | • | Payment Type | 0 | Amount (£) | • | Payment Month | 0 1 | Payment © Date | Description | • | Action |
| L84028 | Fore: Care | at Health | | NHS GLOUCEST LOCATED IN THE OF South West N | ERSHIRE CCG IS EGEOGRAPHY orth | ООН Рау | | 50.00 | | October | | 09/10/2020 | OOH Pay (GMS) this I an extended field | tas I | Edit |
| L84028 | Fores | st Health | | NHS GLOUCEST LOCATED IN THE OF South West N | ERSHIRE CCG IS E GEOGRAPHY orth | Appraisal - Appraiser costs | | -75.00 | | October | | 09/10/2020 | Appraisal - Appraiser of (GMS) Oct | osts | Edit |
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| | | | | | | | | | | | | | | Add | a new adjustm |
| | - ana | | | | | | | | | | Rev | vert To Draft | Save for | Late | r Submit |

Create a new monthly payment schedule in PCSE online

Instead of filling out a new contract variation spreadsheet and uploading this into PCSE Online, you can also specify a bulk adjustment in the Adjustment screens itself and specify what changes need to take effect, who this applies to and when.

To create a bulk upload adjustment, first you need to:

- Log in to PCSE Online
- Click GP Payments
- Choose Payments
- Click Adjustments
- Click New adjustment under the search criteria and enter a new Adjustment Batch Name. (Alternatively you can search for an existing monthly contract schedule and apply new changes to this)

Adjustment Batch

| | R | ADJUSTMENT BATCH S | TATUS | |
|-------------------------|-------------------|--------------------|--------------------|----------|
| 202090000166 | | Draft | | |
| ADJUSTMENT BATCH NAME | | REQUESTING ORGANIS | ATION NAME OR CODE | |
| Adjustment_test_11 | | NHS GLOUCESTERSH | RE CCG | |
| | | | | Update |
| CONTRACTOR CODE OR NAME | AMOUNT FROM | | AMOUNT TO | |
| Contractor Code or Name | | Amount From | | Amount 7 |
| PAYMENT TYPE | PAYMENT DATE FROM | 4 | PAYMENT DATE TO | |
| Payment Type | dd/mm/yyyy | = | dd/mm/yyyy | |
| | | | | Caprob |
| | | | | Search |

Create a new monthly payment schedule in PCSE online

Once this pop up appears, you can begin to specify what needs to be included in the monthly payment schedule. Click on the magnifying glass icons to see more information and then click **Next**.

| Adjustr | PAYMENT TYPE | | |
|-------------|---|--|-----------------------|
| BATCH INF | Payment Type | | |
| ADJUSTME | | | |
| 202090000 | Contractor Code or Name | ~ | |
| ADJUSTME | All practices for an RLT/CCG | ~ | 1 |
| For new cha | | | |
| | Contractor Payment Date | | Update |
| CONTRACT | CONTRACTOR PAYMENT MONTH | | Amount 1 |
| PAYMENT T | Please select month | ~ | |
| Payment T | this will be applicable for first month only, contractor's payment date | remaining payments will be paid according to the | Search |
| Upload Bulk | PAYMENT END MONTH | PAYMENT END YEAR | st CSV Upload Reque |
| | Please select | Please select | Description Acti |

| Adjustr | PAYMENT TYPE | | |
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| BATCH INF | Payment Type | | |
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| Adjustment | All practices for all RELICCO | | J. |
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| | Contractor Payment Date | | Update |
| CONTRACT | CONTRACTOR PAYMENT MONTH | | |
| PAYMENT T | Please select month | | Amount T |
| Payment T | this will be applicable for first month only, re- contractor's payment date | maining payments will be paid according to the | Search |
| Upload Bulk | PAYMENT END MONTH | PAYMENT END YEAR | st CSV Upload Reque |
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| PAYMENT T | this will be applied to far fart month only one | claims any mode will be and according to the | |
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| Contractor | Contractor Commissioner Payment Name Type | Amount © Payment © Payment © Descrip (£) Month Date | tion © Ac |

Click on the magnifying glass icons to see more information.

| 202090000 | PAYMENT END MONTH | PAYMENT END YEAR | |
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| Contractor | Contractor Commissioner Payment Name Type | Amount © Payment © Payment © Descrip (£) Month Date | ption © A |

Create a new monthly payment schedule in PCSE online

Click on the magnifying glass icons to see more information.

Once you are happy with the monthly payment schedule you have created inside of PCSE Online, you can scroll to the bottom of the screen and either Save for Later (We would recommend saving the form after every upload) to the bottom or you can click Submit and the monthly payment schedules will be adjusted from the date specified.

Save for Later Submit

Search Enter Bulk Adjustment Bulk Adjustment Request Upload Bulk Adjustments **CSV Upload Request** Choose File No file chosen 1 Contractor Commissioner Payment . Amount 0 Payment © Payment © Description 0 Contractor ÷ Action Date Code Name Type (£) Month OOH Pay NHS GLOUCESTERSHIRE CCG IS Forest Health (GMS) this has L84028 LOCATED IN THE GEOGRAPHY OOH Pay 50.00 October 09/10/2020 Edit Delete an extended Care OF South West North field NHS GLOUCESTERSHIRE CCG IS Appraisal -Appraisal -Forest Health L84028 LOCATED IN THE GEOGRAPHY Appraiser -75.00 October 09/10/2020 Appraiser costs Edit Delete Care OF South West North costs (GMS) Oct Partners In NHS GLOUCESTERSHIRE CCG IS Appraisal -Appraisal -L84034 Health Pavilion LOCATED IN THE GEOGRAPHY Appraiser 250.00 October 14/10/2020 Appraiser costs Edit Delete OF South West North (GMS) Family Drs costs Add a new adjustment Cancel Back Revert To Draft Save for Later Submi | Terms & Conditions | Privacy | Accessibility | Cookies

Amend an existing batch adjustment

Keep in mind, if the batch has already been approved, then you cannot amend it. You will have to create a new batch. To amend an existing batch adjustment, first you need to:

- Log in to PCSE Online
- Click GP Payments
- Choose Payments
- Click Adjustments

Now you are on this screen, click the magnifying glass icon to see the next steps.

| CONTRACTOR | CODE OR NAME | | AMOUNTFROM | | | | AMOUNT TO | | | |
|---------------|--|---|----------------------------|-----------------------------------|-------------------|-----------------|-----------------------|---|-------------|---------|
| Contractor Co | ode or Name | | | | Amour | nt From | | | Amoun | t To |
| PAYMENT TYP | PE | | PAYMENT DATE | FROM | | | PAYMENT DATE TO | | | |
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| | | | | | | | | | Sear | ch |
| Upload Bul | k Adjustments | | | 1 | Enter Bulk Ad | justment | Bulk Adjustmen | t Request 0 | SV Upload P | lequest |
| Choose Fi | No file chosen | | ± | | | | | | | |
| ontractor * | Contractor © Name | Commissioner | ¢ | Payment Type | ≎ Amount ≎ (£) | Paymen Month | t © Payment © Date | Description | C Action | |
| L84028 | Forest Health Care | NHS GLOUCESTER LOCATED IN THE O OF South West Nor | RSHIRE CCG IS GEOGRAPHY | ООН Рау | 50.00 | October | 09/10/2020 | OOH Pay (GMS) this has an extended field | Edt | Dek |
| L84028 | Forest Health Care | NHS GLOUCESTER LOCATED IN THE C OF South West Nor | RSHIRE CCG IS SEOGRAPHY | Appraisal - Appraiser costs | -75.00 | October | 09/10/2020 | Appraisal - Appraiser costs (GMS) Oct | Edit | Dei |
| L84034 | Partners In Health Pavilion Family Drs | NHS GLOUCESTER LOCATED IN THE O OF South West Nor | RSHIRE CCG IS GEOGRAPHY | Appraisal - Appraiser costs | 250.00 | October | 14/10/2020 | Appraisal - Appraiser costs (GMS) | Edt | Dei |
| | | | | | | | | | | |

Amend an existing batch adjustment

Once you have completed the previous steps, a pop up box will appear showing you the status of the batch to which all the selected payments belong.

Click OK

Once you have amended the batch. Click **Submit** and confirm your submission.

Submit

| | Genue | RLT | | by GP's - contra | | | | 82 | | |
|----------|-------------------------------|---|-------|---|----------|--------|----------------|-----------------------------|----------|----------|
| B00002 | Hoselane Medical Centre | CCGDel2 - Leeds IS LOCATED IN THE GEOGRAPHY OF Lee RLT | eds | Prescription charges collected and remitted by GPs - contra | 1,500.00 | August | 21/08/2020 | Screens Batch Adjustment | Edt | Des |
| 800002 | Hoselane Medical Centre | CCGDel2 - Leeds IS LOCATED IN THE GEOGRAPHY OF Lee RLT | eds | Prescription charges collected and remitted by GPs - contra | 1,500.00 | May | 21/05/2020 | Screens Batch Adjustment | Eat | Deb |
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| | | | | | | | | - | | |
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| AYMENT M | Back | | | | | | Revert To Draf | 1 Save for I | ater | Add |

How do I review and approve an adjustment?

An email notification has just come through telling you that an adjustment has been submitted for approval based on one of you practices monthly contract schedule.

To review this, first you need to:

- Log in to PCSE Online
- Click on the envelope (Notifications icon)
- Find the notification and click Review.

Alternatively:

- Click GP Payments
- Choose Payments
- Click Adjustments

You can now start to review the adjustment that has been created

Click on the magnifying glass icons to see how this is done.

Home Adjustments =

Adjustments

| _ | | | | | | | | | | | | | |
|-----------------------|-------|--------------------------|---|-------------------------|------------|-------|--------------|-----------------|-----------|------------------|--------------|---------------|-------------------|
| 204000003 | | Screens 1 | | 5 | | | 6,750.00 | CCGDel2 - Leeds | | gop p two | ayments cler | k 22/0 | 4/2020 |
| ljustment itch Ref | ۰ | Adjustment Batch Name | ۰ | Payment lin in Batch | 105 | • | Amount (E) | Requesting Orga | inisation | o Creat | ed By | c Crea | ition Date |
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| 02040000003 | | | | | | | | | | | | | |

How do I review and approve an adjustment?

Adjustments

At this point, you have three

- Draft Which will revert the claim into a draft to edit
- Cancel
- Back

options:

When you are in the review section, will have three options again.

Click on the magnifying glass icons to see how this is done.

Once you have selected your outcome, confirm your choice by clicking **Apply** and then **Confirm**.

| | ATCH REFERENCE | E NUMBER OR N | AME | | REQUESTING OR | GANISA | TION NAME | OR CODE | | |
|---|-----------------------------------|---------------------------|----------------------|---|---|---------|-----------|-------------------------|--|--|
| 202040000003 | | | | | CCGDel2 - Leeds | | | | | |
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O NHS England 2019 All rights reserved. | Terms & Conditions | Phracy | Accessibility | Cookies

Step-by-step clicks

Each process has been summarised below in a series of step by step quick clicks. If you would like to see these processes in more detail, return to the contents page and click on the relevant process.

Search for an existing adjustment

- 1. Log in to PCSE Online
- 2. Click GP Payments
- 3. Choose Payments
- 4. Click Adjustments
- 5. Enter your search criteria
- 6. Click Search
- 7. Table below will now be populated with the relevant adjustments

Create a new adjustment

- 1. Log in to PCSE Online
- 2. Click GP Payments
- 3. Choose Payments
- 4. Click Adjustments
- 5. Click Create New Adjustment
- 6. Enter an adjustment batch name
- 7. Click Save and Update when prompted
- 8. Select the practice (contractor) of whose monthly contract schedule needs to be adjusted
- 9. Enter the amount from and amount to, as well as that practices payment type and payment date (from and to)
- 10. Complete the adjustment info and then click Add New Adjustment
- 11. Click submit.

Amend an existing batch adjustment

- 1. Log in to PCSE Online
- 2. Click GP Payments
- 3. Choose Payments
- 4. Click Adjustments
- 5. Search for the relevant existing adjustment
- 6. A pop up box will appear showing you the status of the batch to which all the selected payments belong. Click OK
- 7. Click Add a new adjustment and then fill in the necessary details in the free type text boxes.
- 8. Click Submit.

Create a batch adjustment

- 1. Log in to PCSE Online
- 2. Click GP Payments
- 3. Choose Payments
- 4. Click Adjustments
- 5. Click New Adjustment
- 6. Enter the Payment type, Contractor code or name who's contracted payment schedule is being adjusted, the contractor payment date, Contractor payment month or alternatively, you can select a custom date
- 7. Enter the payment end year and end date (You will also have the option to pay the adjustment quarterly by ticking the Quarterly Payment button)
- 8. Next, you will need to select the value you wish to be paid each month and the total value of all the payments compiled.
- 9. Finally, you need to enter some text in the description box and click Add to Batch. A pop up will appear showing that the adjustment is processing.

How do I review and approve an adjustment?

- 1. Log in to PCSE Online
- 2. Click GP Payments
- 3. Choose Payments
- 4. Click Adjustments
- 5. Click on the relevant adjustment reverence number
- 6. Review the adjustment
- 7. Submit your decision (Delete, Approve or Reject)

NHS England

Primary Care Support England

Your feedback helps us to make things better.

How satisfied are you with this interactive guide for managing adjustments?

Contact Us

For further support and information, please visit our website:



PCSE Website

www.pcse.england.nhs.uk

To visit PCSE Online:

PCSE Online

For queries relating to a particular service, please use our:



Online Enquiries Form

https://pcse.england.nhs.uk/contact-us/

Or alternatively, you can call our:



Customer Support Centre 0333 014 2884

Very Satisfied

Satisfied

Dissatisfied

Very Dissatisfied

Go back to the contents page