

# END-POINT ASSESSMENT PLAN FOR THE OPTICAL ASSISTANT APPRENTICESHIP STANDARD

APPRENTICESHIP STANDARD REFERENCE NUMBER	LEVEL OF THIS END- POINT ASSESSMENT (EPA)	INTEGRATED
ST1377	3	No

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## Introduction and overview

This document explains the requirements for end-point assessment (EPA) for the optical assistant apprentices. End-point assessment organisations (EPAOs) must follow this when designing and delivering their EPA.

Apprentices will be required to complete the core and select one of the three options.

Optical assistant apprentices, their employers and training providers should read this document.

An approved EPAO must conduct the EPA for this apprenticeship. Employers must select an approved EPAO from the Education and Skills Funding Agency's Register of end-point assessment organisations (RoEPAO).

A full-time apprentice typically spends 18 months on-programme (this means in training before the gateway) working towards competence as an optical assistant. All apprentices must spend at least 12 months on-programme. All apprentices must spend at least 20% of their on-programme time completing off-the-job training.

This EPA has 3 EPA methods.

The grades available for each EPA method are:

EPA method 1 - direct observation of practice with questions:

- fail
- pass

EPA method 2 - report with questioning:

- fail
- pass
- distinction

EPA method 3 - professional discussion:

- fail
- pass
- distinction

The result from each EPA method is combined to decide the overall apprenticeship grade. The following grades are available for the apprenticeship:

- fail
- pass
- distinction

## Summary table

<p><b>On-programme typically 18 (months)</b></p>	<p>Training to develop the knowledge, skills and behaviours (KSBs) of the occupational standard.</p> <p>Training towards English and mathematics qualifications at Level 2<sup>1</sup>, if required.</p>
<p><b>End-point assessment gateway</b></p>	<p>The employer must be content that the apprentice is working at or above the level of the occupational standard.</p> <p>The apprentice's employer must confirm that they think the apprentice:</p> <ul style="list-style-type: none"> <li>• is working at or above the level of the occupational standard as an optical assistant</li> <li>• has the evidence required to pass the gateway and is ready to take the EPA</li> </ul> <p>Apprentices must have achieved English and mathematics at Level 2<sup>1</sup>.</p> <p>An apprentice must submit all gateway evidence to the EPAO. The EPAO must review the evidence. When the EPAO confirms the gateway requirements have been met, the EPA period starts and typically takes 3 months to complete. The expectation is that the EPAO will confirm the gateway requirements have been met.</p> <p>Apprentices must submit any policies and procedures as requested by the EPAO.</p>
<p><b>End-point assessment (typically 3 months)</b></p>	<p><b>Grades available for each method:</b></p> <p>Direct observation of practice with questions</p> <ul style="list-style-type: none"> <li>• fail</li> <li>• pass</li> </ul> <p>Report with questioning</p> <ul style="list-style-type: none"> <li>• fail</li> <li>• pass</li> <li>• distinction</li> </ul> <p>Professional discussion</p> <ul style="list-style-type: none"> <li>• fail</li> <li>• pass</li> </ul>

	<ul style="list-style-type: none"> <li>• distinction</li> </ul> <p><b>Overall EPA and apprenticeship can be graded:</b></p> <ul style="list-style-type: none"> <li>• fail</li> <li>• pass</li> <li>• distinction</li> </ul>
<b>Professional recognition</b>	Professional body recognition is not relevant to this occupational apprenticeship
<b>Re-sits and re-takes</b>	<ul style="list-style-type: none"> <li>• Re-take and re-sit grade cap: pass</li> <li>• Re-sit timeframe: typically 2 months</li> <li>• Re-take timeframe: typically 3 months</li> </ul>

<sup>1</sup>For those with an education, health and care plan or a legacy statement, the apprenticeship's English and mathematics minimum requirement is Entry Level 3. British Sign Language (BSL) qualifications are an alternative to English qualifications for those who have BSL as their primary language.

## Length of end-point assessment period

The EPA will be taken within the EPA period. The EPA period begins when the EPAO confirms the gateway requirements are met and is typically 3 months.

The expectation is that the EPAO will confirm the gateway requirements are met and the EPA is begun as quickly as possible.

## End-point assessment gateway

The EPA period should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, that is to say, they are deemed to have achieved occupational competence. In making this decision, the employer may take advice from the apprentice's training provider(s), but the decision must ultimately be made solely by the employer.

The EPAO determines when all other gateway requirements have been met, and the EPA period will only commence once the EPAO has confirmed this.

The employer must be content that the apprentice is working at or above the level of the occupational standard.

The apprentice's employer must confirm that they think the apprentice:

- is working at or above the occupational standard as an optical assistant
- has the evidence required to pass the gateway and is ready to take the EPA

Apprentices must have achieved English and mathematics at Level 2<sup>1</sup>.

An apprentice must submit all gateway evidence to the EPAO. The EPAO must review the evidence. When the EPAO confirms the gateway requirements have been met, the EPA period starts and typically takes 3 months to complete.

Apprentices must submit any policies and procedures as requested by the EPAO.

For the report with questioning method:

- the EPAO will be required to give the apprentice a customer complaint brief of no more than 300 words within 5 days of passing the gateway on which the apprentice will base their report.

The EPA period starts when the EPAO confirms all gateway requirements have been met. The expectation is they will do this as quickly as possible.

## **Assessment methods**

The assessment methods can be delivered in any order.

The result of one assessment method does not need to be known before starting the next.

## **End-point assessment method 1: direct observation of practice with questions**

### **Overview**

In an observation with questions, an independent assessor observes an apprentice in their workplace. The apprentice completes their day-to-day duties under normal working conditions. This allows the apprentice to demonstrate the KSBs shown in the mapping through naturally occurring evidence. The independent assessor asks questions as explained below. Simulation is not permitted during the observation.

The observation and responses to questions must be assessed holistically by the independent assessor when they are deciding the grade for the direct observation of practice with questions.

### **Rationale**

This EPA method is being used because:

- this is a practical role, best demonstrated through completing tasks in a real work setting
- observation makes use of employer resources and equipment, which will be familiar to the apprentice and thus allow them to perform at their best

- tasks completed during the observation should contribute to workplace productivity and are valid
- it is a holistic assessment method

## Delivery

The direct observation of practice with questions must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this EPA method to the highest available grade.

The independent assessor must only observe one apprentice at any one time to ensure quality and rigour and they must be as unobtrusive as possible.

EPAOs must make arrangements for the observation with questions with the apprentice's employer.

The EPAO must give an apprentice 10 working days' notice of the observation.

The observation of practice with questions must take 2 hours and 30 minutes in total, permitting time for:

- observation 2 hours
- questioning 30 minutes

The independent assessor can increase the time of the observation by up to 10%. This time is to allow the apprentice to complete a task or respond to a question if necessary. The observation and questioning must allow the apprentice the opportunity to demonstrate the KSBs at the highest possible grade.

The observation of practice with questions cannot be split, except for comfort breaks or to allow an apprentice to move from one location to another. Such breaks will not count towards the total observed time.

EPAOs must manage invigilation of apprentices at all times to maintain security of the EPA, in line with their malpractice policy. This includes breaks and moving between locations.

The independent assessor must explain verbally to the apprentice the format and timescales of the observation before it begins. This does not count towards the assessment time.

The independent assessor should observe the following during the observation:

### 1. Dispensing

- meet dispensing requirements set out by the employer and legislation
- question the customer to identify their needs

- offer the customer suitable products to meet their needs and explain the features to them using available resources, including suitable offers and their features
- identify and select appropriate frames and lenses based on customer requirements to ensure an accurate fit and that correct lens choices are made
- ensure the frame fitting is good, suitable, and available for the customer
- accurately take the frame and spectacle lens measurements using the available technology to include pupil distance and vertical heights if required
- accurately record the order details and explain the collection procedures
- complete the sales transaction according to company requirements
- inform the customer of the collection process and procedures in line with company standards

## **2. Collection procedures:**

- greet customer
- confirm customer's details and collection requirement
- accurately check frame fit and make appropriate adjustments
- accurately check visual acuity based on the prescription requirements
- explain after sales services to the customer in line with company standards

## **3. Checking the accuracy of prescriptions**

- use lens measuring equipment to check lens prescriptions and measurements of single vision and multifocal lenses

The observation with questions should be conducted in the following way, to take account of the occupational context in which the apprentice operates:

The apprentice will be observed providing optical care in the workplace to a succession of individuals. Verbal patient GDPR consent will be agreed on the day of the clinic, prior to treatment. This must be supplemented by the independent assessor asking the apprentice questions after the observation.

As the apprentice will be carrying out their everyday work with patients\customers, the apprentice will see a minimum of two patients\customers and precise activity cannot be determined in advance. These patients\customers will not be chosen for the end-point assessment but are part of the normal workload of the apprentice.

These activities provide the apprentice with the opportunity to demonstrate the KSBs as shown in the mapping.

The independent assessor must be unobtrusive whilst conducting the observation.

Questions must be asked after the observation to assess the apprentice's breadth and depth of competence against the grading descriptors. The questioning will last for 30 minutes. The independent assessor must ask a minimum of 6 questions. They may ask follow-up questions where clarification is required. Independent assessors must use the question bank as a source for questioning and are expected to use their professional judgment to tailor those questions appropriately.

As only naturally occurring work is observed, those KSBs that the apprentice did not have the opportunity to demonstrate can be assessed via questioning, although these should be kept to a minimum. These questions are in addition to the set number of questions for the observation. The independent assessor can also ask questions to clarify answers given by the apprentice.

The independent assessor conducts and assesses the direct observation of practice with questions. They must record the KSBs observed, KSBs demonstrated in answers to questions and the grade achieved. The apprentice's answers to questions must also be recorded.

The independent assessor makes all grading decisions.

### **Assessment location**

The direct observation of practice with questions must take place in the apprentice's normal place of work (for example their employer's premises or a customer's premises). Equipment and resources needed for the observation must be provided by the employer and be in good working condition.

Questioning that occurs after the observation should take place in a quiet room, free from distractions and influence.

### **Question and resource development**

EPAOs must write an assessment specification and question bank. The specification must be relevant to the occupation and demonstrate how to assess the KSBs shown in the mapping. It is recommended this is done in consultation with employers of this occupation. EPAOs should maintain the security and confidentiality of EPA materials when consulting employers. The questions must be unpredictable. A question bank of sufficient size will support this. The assessment specification and questions must be reviewed at least once a year to ensure they remain fit-for-purpose.

EPAOs will develop purpose-built question banks and ensure that appropriate quality assurance procedures are in place, for example, considering standardisation, training and moderation. EPAOs will ensure that questions are refined and developed to a high standard.

EPAOs must ensure that apprentices have a different set of questions in the case of re-sits or re-takes.

EPAOs must produce the following materials to support the direct observation of practice with questions:



- Independent assessor assessment materials which include:
  - training materials
  - administration materials
  - moderation and standardisation materials
  - guidance materials
  - grading guidance
  - a question bank
- EPA guidance for the apprentice and employer

## End-point assessment method 2: Report with questioning

### Overview

This assessment method has 2 components.

The assessment method is the production of a report and questioning.

The report should be designed to ensure that the apprentice's work meets the needs of the business, is relevant to their role and allows the relevant KSBs to be assessed for the EPA. It will be followed by questioning from the independent assessor. The employer will ensure it has a real business application and the EPAO will ensure it meets the requirements of the EPA, including suitable coverage of the KSBs assigned to this assessment method as shown in the mapping of assessment methods.

Both components should allow the apprentice the opportunity to obtain the highest possible grade. The combination of the components makes the method more robust and gives the apprentice an opportunity to provide depth.

Apprentices will prepare the report based on a customer complaint brief provided by the EPAO. The report must illustrate how the apprentice has resolved the customer complaint.

The rationale for this assessment method is:

- the customer complaint brief is designed to enable the apprentice to draft a report that demonstrates the application of knowledge and skills as they would in occupational practice
- it tests how customer concerns are handled and tests both higher and lower order knowledge, skills and behaviours.

The evidence from the report and responses to questions will be assessed holistically.

## Delivery

### Assessment method 2 Component 1: Report

Apprentices will complete and submit a report.

The report will show how the apprentice has resolved a customer complaint, which will be based on a brief provided by the EPAO.

The employer is responsible for ensuring the report has a real business relevance and the EPAO is responsible for confirming that it provides appropriate coverage of the KSBs.

The apprentice will be provided with a customer complaint brief by the EPAO on which to base their report within 5 working days of passing the gateway. The customer complaint brief should be no more than 300 words and must include the following minimum requirements:

- a customer complaint relating to frame fitting and vision problems e.g., issues with the warranty, poor fitting, remake or repair procedures, product tolerances

The apprentice will have 4 weeks from receipt of the brief to develop the report which will be submitted to the independent assessor for marking at least 2 weeks prior to the questioning session.

The employer should ensure the apprentice has sufficient time and the necessary resources, within this period, to plan and undertake the work associated with the report.

The apprentice must complete a 3,500-word report (+/- 10% at the apprentice's discretion) excluding tables, graphs, figures excluding references and annexes. The report can be submitted to the EPAO in a paper or electronic format.

The report must be based on the customer complaint brief issued by the EPAO following gateway.

The following headings can be used as a guide for structuring the report. This list is not exhaustive:

- overview of the issue
- detailed description of the issue/problem to be addressed
- list of key objectives and aims
- detailed action plan e.g.
  - analysis of the scale, scope and impact issue
  - patient/customer considerations
  - legislative issues
  - solution
  - timeline

- proposed next step(s)
- the implications of not resolving concerns or meeting customer needs

The apprentice should complete their report unaided. When the report is submitted, the apprentice and their employer must verify that the submitted report is the apprentice's own work.

Apprentices must be provided with written instructions on how the report based on the customer complaint brief must be completed and information on the questioning, including the timescales they are working to in advance of the assessment.

The independent assessor will:

- use the structured template provided by the EPAO to conduct the assessment of the report and question and answer session and to check that the KSBs are met
- use the grading matrix provided by the EPAO
- award an overall grade for the report and question and answer session
- the independent assessor will review and assess the report holistically together with the other component of this assessment method
- the independent assessor will make all grading decisions

## **Assessment method 2 Component 2: Questioning**

Apprentices must be given at least 2 weeks' notice of the date and time of the question and answer session.

Apprentices will be required to answer questions based on their report.

The independent assessor must have at least 2 weeks to review the report in advance of the question and answer session to allow them to prepare appropriate questions.

The question and answer session will be arranged by the EPAO in consultation with the employer and apprentice. The question and answer session should take place on a one-to-one basis, either face-to-face or via online video conferencing. Video conferencing can be used to conduct the question and answer session, but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided.

The question and answer session must last for 30 minutes. The independent assessor can increase the total time by up to 10%. This time is to allow the apprentice to complete their last point or respond to a question if necessary. The question and answer session must allow the apprentice the opportunity to demonstrate the KSBs at the highest possible grade.

The independent assessor must ask at least 6 questions. They must use the questions from the EPAO's question bank or create their own questions in-line with the EPAO's training. Follow up questions are allowed where clarification is required.

The independent assessor must use the full time available for questioning. This is to allow the apprentice the opportunity to show they are competent at the highest grade available for this method.

The independent assessor will:

- ask the apprentice a minimum of 6 questions during the question and answer session
- use the EPAO question bank as a source for questioning and use their professional judgement to tailor those questions appropriately
- ask follow-up questions where clarification is required

### **Assessment location**

The questioning must take place in a quiet room, free from distractions and influence.

The questioning can take place in any of the following:

- employer's premises
- a suitable venue selected by the EPAO (for example a training provider's premises)
- questioning via video conferencing

Video conferencing can be used, but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided in any way e.g., use of a 360 degree camera to allow the independent assessor to look around the room during the questioning.

### **Question and resource development**

A question bank must be developed by EPAOs. The question bank must be of sufficient size to prevent predictability and the EPAO must review it regularly (at least once a year) to ensure that it, and its content, are fit for purpose. The questions relating to the KSBs must be varied yet allow assessment of the relevant KSBs.

EPAOs must ensure that apprentices have a different set of questions in the case of re-sits/re-takes.

As a minimum, EPAOs will produce the following material to support this assessment method:

- a question bank
- Structured specification

- Marking materials
- Grading guidance
- Independent assessor training materials
- Assessment recording documentation

## End-point assessment method 3: Professional discussion

### Overview

In the professional discussion, an independent assessor and apprentice have a formal two-way conversation. It gives the apprentice the opportunity to demonstrate their competency across the KSBs as shown in the mapping.

### Rationale

- the professional discussion will allow the apprentice to draw on their experience linked to the knowledge, skills and behaviours (KSBs) mapped to this assessment method
- it allows the apprentice to explore their own practice and experience with the independent assessor to show how they demonstrate the occupation's knowledge, skills and behaviours and that they are occupationally competent
- a professional discussion is a well-recognised method of checking knowledge, skills and behaviours and is widely used within the health sector
- the purpose of the questioning is to assess the depth of understanding of the KSBs

### Delivery

The professional discussion must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this EPA method to the highest available grade.

The purpose of the independent assessor's questions will be to assess the apprentice against the KSBs in the following themes:

- procedures and compliance
- company beliefs and values
- customer types, needs and the services available
- appointment booking procedures
- the impact of customer concerns
- business modes and KPIs
- personal development
- screening
- contact Lens
- domiciliary

The EPAO must give an apprentice 10 working days' notice of the professional discussion.

The professional discussion must last for 60 minutes. The independent assessor can increase the time of the professional discussion by up to 10%. This time is to allow the apprentice to respond to a question if necessary.

For the professional discussion, the independent assessor must ask at least 10 questions. Follow-up questions are allowed. The independent assessor must use the questions from the EPAO's question bank or create their own questions in-line with the EPAO's training. The professional discussion must allow the apprentice the opportunity to demonstrate the KSBs mapped to this EPA method at the highest possible grade.

The independent assessor conducts and assesses the professional discussion.

The independent assessor must keep accurate records of the assessment. The records must include the KSBs met, the grade achieved and answers to questions.

The independent assessor will make all grading decisions.

### **Assessment location**

The professional discussion must take place in a suitable venue selected by the EPAO.

The venue could be the EPAO's or employer's premises.

The professional discussion should take place in a quiet room, free from distractions and influence.

The professional discussion can be conducted by video conferencing. The EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided.

### **Question and resource development**

EPAOs must write an assessment specification and question bank. The specification must be relevant to the occupation and demonstrate how to assess the KSBs shown in the mapping. It is recommended this is done in consultation with employers of this occupation. EPAOs should maintain the security and confidentiality of EPA materials when consulting employers. The questions must be unpredictable. A question bank of sufficient size will support this. The assessment specification and questions must be reviewed at least once a year to ensure they remain fit-for-purpose.

EPAOs will develop purpose-built question banks and ensure that appropriate quality assurance procedures are in place. For example, considering standardisation, training and moderation. EPAOs will ensure that questions are refined and developed to a high standard.

EPAOs must ensure that apprentices have a different set of questions in the case of re-sits or re-takes.

EPAOs must produce the following materials to support the professional discussion:

- Independent assessor assessment materials which include:
  - training materials
  - administration materials
  - moderation and standardisation materials
  - guidance materials
  - grading guidance
  - question bank
- EPA guidance for the apprentice and employer.

## Grading

### Direct Observation of Practice with questions

Fail - does not meet pass criteria

THEME	PASS
KSBs	Apprentices must demonstrate all the pass descriptors
(Core) The dispensing process K9 K21 K22 K24 K25 K26 K29 S1, S9 S20 S21 S23 S24 S25 S27 S28 B1 B3	<p>Interprets the customer's spectacle prescription to identify a range of vision correction options. Offers suitable lens/frame products and explains the features and benefits based on their preferences, facial, frame and lens measurements in line with company values beliefs and purpose. (K21, K22, K24, S1, S20, S21, S23)</p> <p>Identifies and discusses at least one spectacle product offer with a customer based on their needs and preferences. Processes the order, offers any relevant promotions, takes their payment, and agrees the collection options. (K26, S25)</p> <p>Uses and maintains frame fitting techniques, optical equipment, lens measuring equipment and tools safely to correctly fit and adjust spectacle frames without causing damage.</p>

THEME	PASS
KSBs	Apprentices must demonstrate all the pass descriptors
	<p>Uses questioning to meet customer order and prescription,</p> <p>Treat customer with dignity and respect. Being adaptable, reliable and committed to the business. (K9, K25, K29, S9, S24, S27, S28, B1, B3)</p>
<p>(Core) Collections K27 K30 S26 S29 B6</p>	<p>Identifies and checks customer's visual acuity for near vision spectacles and explains any adaptations as required (K27, S26)</p> <p>Provides advice and guidance on frame fitting, lens care and offers a range of aftersales services to the customer with openness and integrity displayed at all times (K30, S29, B6)</p>
<p>(Core) Pre-appointment process K13 K14 K17 S13 S15 S16</p>	<p>Completes pre-appointment procedures, selects appointment, completes exemption checks, confirms appointment with private and NHS customers, and prepares and maintains clinical/customer records accurately on employer system. (K13, K14, K17, S13, S15, S16)</p>
<p>(Core) Customer service and customer communication K6 K8 K11 S5 S6 S8 S11 B4</p>	<p>Communicates with customers and colleagues with care and compassion to maximise understanding and identifies and meets customer and team needs (K6, S5, S6, B4)</p> <p>Provides the benefits and limitations of the different services and extended services to the customers within the optical environment (K11, S11)</p> <p>Adheres to health and safety legislation including customer safety, hygiene, infection control and the safe use of all equipment (K8, S8)</p>
<p>(Core) Obtaining prescriptions and lens measurements from spectacles K19 K20</p>	<p>Uses lens measuring equipment correctly to identify prescriptions and lens measurements. Identifies lens types using engravings. (K19, K20, S18, S19)</p>



THEME	PASS
KSBs	Apprentices must demonstrate all the pass descriptors
S18 S19	

## Report with questioning

Fail - does not meet pass criteria

THEME	PASS	DISTINCTION
KSBs	Apprentices must demonstrate all the pass descriptors	Apprentices must demonstrate all the pass descriptors and all of the distinction descriptors
<p>(Core) Polices, procedures and standards K18 K28 K31 K32 K33 K34 K35 S17 S30 S31 S32 S33 S34 S35 S36</p>	<p>Explains how product tolerances are correctly validated to ensure product accuracy. (K18, S17)</p> <p>Explains the communication methods used to identify the customer complaint. The types of questions, problem solving techniques and poor fitting implications on the customer and business and how to the complaint is resolved and what solutions and options offered. (K28, K34, K35, S36, S32)</p> <p>Explains what guarantees or warranties are available within the optical environment and how the legal requirements for consumers are met (K31, S30)</p> <p>Summarises how they manage a customer complaint/concern using company policies and remake and repair procedures including the methods of communication used to resolve the issue</p>	<p>Explains the impact on the customer's vision, prescriptions and or measurements where they don't meet the British standard tolerances (K18, S17)</p> <p>Makes recommendations on how to improve policies or procedures to reduce customer complaints (K32)</p>

THEME	PASS	DISTINCTION
<b>KSBs</b>	<b>Apprentices must demonstrate all the pass descriptors</b>	<b>Apprentices must demonstrate all the pass descriptors and all of the distinction descriptors</b>
	within the limits of their own authority (K32, K33, S31, S33, S34, S35)	

## Professional discussion

Fail - does not meet pass criteria

THEME	PASS	DISTINCTION
<b>KSBs</b>	<b>Apprentices must demonstrate all the pass descriptors</b>	<b>Apprentices must demonstrate all the pass descriptors and all of the distinction descriptors</b>
(Core) Procedures and compliance K2 K3 K10 K16 S2 S3 S10 S14	<p>Explains how to adhere to patient referral policies, procedures and regulation and the implications of not following procedures</p> <p>Identifies when and who to refer to when supervision is required for ocular emergencies, screening, dispensing and collection restrictions. Accurately reports and records ocular emergencies in line with employer procedures Works within the limits of local and national policies. (K2, K3, K16, S2, S3, S14)</p> <p>Explains the first aid reporting and evacuation procedures in the workplace and who to refer to and how to safely evacuate the store (K10, S10)</p>	<p>Explains the implications of not following policies and procedures on their colleagues and the impact on brand reputation (K2, K3, S2, S3)</p> <p>Explains how to mitigate risks of accidents or incidents based on past examples (K10, S10)</p>
(Core) Company beliefs and values	Explains the company's beliefs, values and purpose	Evaluates how company beliefs and

THEME	PASS	DISTINCTION
KSBs	Apprentices must demonstrate all the pass descriptors	Apprentices must demonstrate all the pass descriptors and all of the distinction descriptors
K1 K4 S4 B2	and why personal presentation, time management and team working can impact these and how they have shown discretion and empathy to colleagues. (K1, K4, S4, B2)	values have been used to make recommendations to improve the service levels and the customer experience. (K1, K4, S4)
(Core) Customer types, needs and the services available K5 K7 K12 K23 K39, K40 K41 S7 S12 S22 S39	<p>Explains the importance of identifying and adapting to customer needs. Explains the non- prescribed and specialised products that can be offered to customers based on their needs and preferences and when to refer customers needing communication support. (K5, K7, K12, K23, S7, S12, S22)</p> <p>Explains how to adapt customer service when dealing with customers with ocular conditions such as glaucoma, cataracts, macular degeneration, diabetes. (K40, S39)</p> <p>Explains how a customer's ability to make a purchasing decision is made and who to involve under the Mental Capacity Act etc. (K39)</p> <p>Explains the purpose of the equipment used and the purpose of different screening tests available within the optical environment.</p>	<p>Evaluates the non-prescribed products available and identifies additions that may support specific customer types and makes recommendations for improvements to products/services (K5, K7, K12, K23, S7, S12, S22)</p>

THEME	PASS	DISTINCTION
KSBs	Apprentices must demonstrate all the pass descriptors	Apprentices must demonstrate all the pass descriptors and all of the distinction descriptors
	(K41)	
(Core) Appointment booking procedures K15	Describes the business sight test and contact lens recall requirements. (K15)	Explains the benefits of different methods of recall. (K15)
(Core) The impact of customer concerns K36	Gives an example of how they resolved a customer complaint and the impact of customer concerns on the store and colleagues and how good service can help to prevent complaints. (K36)	Describes the impact of customer concerns on the brand and brand reputation and make recommendations to reduce complaints  (K36)
(Core) Business models and KPI's K38	Explains how they use the sales targets and KPI's for the business/team to support individual targets. (K38)	Describes how they have influenced sales targets and worked with colleagues to achieve them.  (K38)
(Core) Personal development K37 S37 S38 B5	Explains the importance of reflection and participation in training and development opportunities to maintain own continuous practice and continue to show resilience and self-awareness. Explains the importance of participating in appraisal to plan for future development and career opportunities.  (K37, S37, S38, B5)	Identifies their future development opportunities and goals and how they plan to achieve these. (K37, S38)

THEME	PASS	DISTINCTION
KSBs	Apprentices must demonstrate all the pass descriptors	Apprentices must demonstrate all the pass descriptors and all of the distinction descriptors
<p>(Option 1: Screening Assistant) K42 K43 K44 S40 S41 S42 S43</p>	<p>Outlines the screening procedures which are explained to the patient, including the equipment used and the medical conditions it checks for. Explains how a range of screening checks are completed and results accurately recorded. Describes how screening supports the optician. (K42, K44, S40, S41, S43)</p> <p>Explains how a screening test is conducted and results are passed onto optometrist/dispensing optician and when to ask for support or guidance from colleagues during screening when required. (K43, S42)</p>	<p>Makes recommendations to improve the processes and procedures for screening and shares and trains colleagues to use them. (S41)</p>
<p>(Option 2: Contact Lens Assistant) K45 K46 K47 S44 S45 S46 S47</p>	<p>Describes how they inform the patient about contact lens handling, insertion and removal and how to clean, care and store them. (K45, K46, S44, S45, S46)</p> <p>Explains what to do in an emergency outside of store opening hours. (K47, S47)</p>	<p>Makes recommendations to improve the procedures for contact lens insertion and removal and trains colleagues to use them. (K45, S45)</p>
<p>(Option 3: Domiciliary Optical Assistant) K48 K49 K50 K51 S48 S49 S50 S51 S52 S53</p>	<p>Explains how they independently manage their workload, assess and mitigate risk for different environments, patients and</p>	

THEME	PASS	DISTINCTION
KSBs	Apprentices must demonstrate all the pass descriptors	Apprentices must demonstrate all the pass descriptors and all of the distinction descriptors
	<p>customers to deliver eye tests. Explains how they tell the customer what the sight test includes and how it is carried out. (K48, K51, S49, S50, S51)</p> <p>Explains how they recognise a customer's ability to make an informed decision. (S48)</p> <p>Explains the importance of communicating with the team when working remotely and managing own resources and wellbeing. (K49, K50, S52, S53)</p>	<p>Makes recommendations on working independently and trains colleagues to gain independence. (K48, S50)</p>

## Overall EPA Grading

The EPA methods contribute equally to the overall EPA grade.

Performance in the EPA will determine the apprenticeship grade of:

- fail
- pass
- distinction

Independent assessors must individually grade the: direct observation of practice with questions, report with questioning and professional discussion according to the requirements set out in this EPA plan.

EPAOs must combine the individual assessment method grades to determine the overall EPA grade.

Apprentices who fail one or more assessment method will be awarded an overall EPA fail.

Apprentices must achieve at least a pass in all the EPA methods to get an overall pass. In order to achieve an overall EPA 'distinction', apprentices must achieve a pass in the observation with questioning, a distinction in the report with questioning and professional discussion assessment methods.

Grades from individual assessment methods should be combined in the following way to determine the grade of the EPA as a whole.

DIRECT OBSERVATION OF PRACTICE WITH QUESTIONS	REPORT WITH QUESTIONING	PROFESSIONAL DISCUSSION	OVERALL GRADING
Fail	Fail	Fail	Fail
Pass	Distinction	Pass	Pass
Pass	Pass	Distinction	Pass
Pass	Distinction	Distinction	Distinction

## Re-sits and re-takes

Apprentices who fail one or more EPA method(s) can take a re-sit or a re-take at the employer's discretion. The apprentice's employer needs to agree that a re-sit or re-take is appropriate. A re-sit does not need further learning, whereas a re-take does.

Apprentices should have a supportive action plan to prepare for a re-sit or a re-take.

The employer and EPAO agree the timescale for a re-sit or re-take. A re-sit is typically taken within 2 months of the EPA outcome notification. The timescale for a re-take is dependent on how much re-training is required and is typically taken within 3 months of the EPA outcome notification. The timescale for a re-take is dependent on how much re-training is required and is typically taken within 3 months of the EPA outcome notification.

If the apprentice fails the report with questioning assessment method, they will be required to amend the report in line with the independent assessor's feedback. The apprentice will be given 2 weeks to rework and submit the amended report. The independent assessor will have 2 weeks to review the report and the apprentice will have 5 working days' notice of the question and answer session.

Failed EPA methods must be re-sat or re-taken within a 6-month period from the EPA outcome notification, otherwise the entire EPA will need to be re-sat or re-taken in full.

Re-sits and re-takes are not offered to apprentices wishing to move from pass to a higher grade.

An apprentice will get a maximum EPA grade of pass for a re-sit or re-take, unless the EPAO determines there are exceptional circumstances.

## Roles and responsibilities

ROLES	RESPONSIBILITIES
Apprentice	<p>As a minimum, apprentices should:</p> <ul style="list-style-type: none"> <li>participate in and complete on-programme training to meet the KSBs as outlined in the occupational standard for a minimum of 12 months</li> <li>undertake 20% off-the-job training as arranged by the employer and training provider</li> <li>understand the purpose and importance of EPA</li> <li>undertake the EPA including meeting all gateway requirements.</li> </ul>
Employer	<p>As a minimum, employers should:</p> <ul style="list-style-type: none"> <li>select the EPAO and training provider</li> <li>work with the training provider (where applicable) to support the apprentice in the workplace and to provide the opportunities for the apprentice to develop the KSBs</li> </ul>



ROLES	RESPONSIBILITIES
	<ul style="list-style-type: none"> <li>• arrange and support a minimum of 20% off-the-job training to be undertaken by the apprentice</li> <li>• decide when the apprentice is working at or above the occupational standard and so is ready for EPA</li> <li>• ensure that all supporting evidence required at the gateway is submitted in accordance with this EPA plan</li> <li>• remain independent from the delivery of the EPA</li> <li>• confirm arrangements with the EPAO for the EPA (who, when, where) in a timely manner (including providing access to any employer-specific documentation as required, for example company policies)</li> <li>• ensure that the EPA is scheduled with the EPAO for a date and time which allows appropriate opportunity for the apprentice to meet the KSBs</li> <li>• ensure the apprentice is well prepared for the EPA</li> <li>• ensure the apprentice is given sufficient time away from regular duties to prepare for, and complete all post-gateway elements of the EPA, and that any required supervision during this time (as stated within this EPA plan) is in place</li> <li>• where the apprentice is assessed in the workplace, ensure that the apprentice has access to the resources used on a daily</li> <li>• pass the certificate to the apprentice upon receipt from the EPAO.</li> </ul>
EPAO	<p>As a minimum, EPAOs should:</p> <ul style="list-style-type: none"> <li>• conform to the requirements of this EPA plan and deliver its requirements in a timely manner</li> <li>• conform to the requirements of the Register of End-Point Assessment Organisations (RoEPAO)</li> <li>• conform to the requirements of the external quality assurance provider (EQAP) for this apprenticeship standard</li> <li>• understand the occupational standard</li> <li>• make all necessary contractual arrangements, including agreeing the price of the EPA</li> <li>• develop and produce assessment materials including specifications and marking materials (for example mark schemes, practice materials, training material)</li> <li>• appoint suitably qualified and competent independent assessors</li> </ul>

ROLES	RESPONSIBILITIES
	<ul style="list-style-type: none"> <li>• appoint administrators (and invigilators where required) to administer the EPA as appropriate</li> <li>• provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading</li> <li>• provide adequate information, advice and guidance documentation to enable apprentices, employers and training providers to prepare for the EPA</li> <li>• arrange for the EPA to take place, in consultation with the employer</li> <li>• where the apprentice is not assessed in the workplace, ensure that the apprentice has access to the required resources and liaise with the employer to agree this if necessary</li> <li>• develop and provide appropriate assessment recording documentation to ensure a clear and auditable process is in place for providing assessment decisions and feedback to all relevant stakeholders</li> <li>• have no direct connection with the apprentice, their employer or training provider. In all instances, including when the EPAO is the training provider (i.e., HEI), there must be no conflict of interest</li> <li>• have policies and procedures for internal quality assurance (IQA), and maintain records of regular and robust IQA activity and moderation for external quality assurance (EQA) purposes</li> <li>• deliver induction training for independent assessors, and for invigilators and/or markers (where used)</li> <li>• undertake standardisation activity on this apprenticeship standard for all independent assessors before they conduct an EPA for the first time, if the EPA is updated and periodically as appropriate (a minimum of annually)</li> <li>• manage invigilation of apprentices in order to maintain security of the assessment in line with the EPAO's malpractice policy</li> <li>• verify the identity of the apprentice being assessed</li> <li>• use language in the development and delivery of the EPA that is appropriate to the level of the occupational standard</li> <li>• provide details of the independent assessor's name and contact details to the employer</li> <li>• have, and apply appropriately, an EPA appeals process</li> <li>• request certification via the Apprenticeship Service upon successful achievement of the EPA.</li> </ul>

ROLES	RESPONSIBILITIES
	<ul style="list-style-type: none"> <li>confirm the gateway requirements have been met and the EPA is begun as quickly as possible.</li> </ul>
Independent assessor	<p>As a minimum, independent assessors should:</p> <ul style="list-style-type: none"> <li>have the competence to assess the apprentice at this level and hold any required qualifications and experience in line with the requirements of the independent assessor as detailed in the IQA section of this EPA plan</li> <li>understand the occupational standard and the requirements of this EPA</li> <li>have, maintain and be able to evidence, up-to-date knowledge and expertise of the subject matter</li> <li>deliver the end-point assessment in-line with the EPA plan</li> <li>comply with the IQA requirements of the EPAO</li> <li>have no direct connection or conflict of interest with the apprentice, their employer or training provider; in all instances, including when the EPAO is the training provider (i.e., HEI)</li> <li>attend induction training</li> <li>attend standardisation events when they begin working for the EPAO, before they conduct an EPA for the first time and a minimum of annually on this apprenticeship standard</li> <li>assess each assessment method, as determined by the EPA plan, and without extending the EPA unnecessarily</li> <li>assess against the KSBs assigned to each assessment method, as shown in the mapping of assessment methods and as determined by the EPAO, and without extending the EPA unnecessarily</li> <li>make all grading decisions</li> <li>record and report all assessment outcome decisions, for each apprentice, following instructions and using assessment recording documentation provided by the EPAO, in a timely manner</li> <li>use language in the development and delivery of the EPA that is appropriate to the level of the occupational standard</li> <li>mark open (constructed) test answers accurately according to the EPAO's mark scheme and procedures.</li> </ul>
Training provider	<p>As a minimum, training providers should:</p> <ul style="list-style-type: none"> <li>work with the employer and support the apprentice during the off-the-job training to provide the opportunities to develop the</li> </ul>

ROLES	RESPONSIBILITIES
	<p>knowledge, skills and behaviours as listed in the occupational standard</p> <ul style="list-style-type: none"> <li>• conduct training covering any knowledge, skill or behaviour requirement agreed as part of the Commitment Statement (often known as the Individual Learning Plan).</li> <li>• monitor the apprentice's progress during any training provider led on-programme learning</li> <li>• advise the employer, upon request, on the apprentice's readiness for EPA</li> <li>• remain independent from delivery of the EPA. Where the training provider is the EPA (i.e., a HEI) there must be procedures in place to mitigate against any conflict of interest.</li> </ul>

## Reasonable adjustments

The EPAO must have reasonable adjustments arrangements for the EPA.

This should include:

- how an apprentice qualifies for reasonable adjustment
- what reasonable adjustments may be made

Adjustments must maintain the validity, reliability and integrity of the EPA as outlined in this EPA plan.

## Internal quality assurance (IQA)

Internal quality assurance refers to how EPAOs ensure valid, consistent and reliable EPA decisions. EPAOs must adhere to the requirements within the roles and responsibilities section and:

- have effective and rigorous quality assurance systems and procedures that ensure fair, reliable and consistent EPA regardless of employer, place, time or independent assessor
- appoint independent assessors who are competent to deliver the EPA and who:
  - have recent relevant experience of the occupation or sector to at least occupational level 3 gained in the last 2 years or significant experience of the occupation or sector
- operate induction training for anyone involved in the delivery and/or assessment of the EPA
- provide training for independent assessors in good assessment practice, operating the assessment tools and making grading decisions

- provide ongoing training for markers and invigilators
- provide standardisation activity for this apprenticeship standard for all independent assessors:
  - before they conduct an EPA for the first time
  - if the EPA is updated
  - periodically as appropriate (a minimum of annually)
- conduct effective moderation of EPA decisions and grades
- conduct appeals where required, according to the EPAO's appeals procedure, reviewing and making final decisions on EPA decisions and grades
- have no direct connection with the apprentice, their employer or training provider. In all instances, including when the EPAO is the training provider (for example a higher education institution)

## Value for money

Affordability of the EPA will be aided by using at least some of the following:

- utilising digital remote platforms to conduct applicable assessment methods
- using the employer's premises
- conducting assessment methods on the same day

## Professional recognition

Professional body recognition is not relevant to this occupational apprenticeship.

## Mapping of KSBs to assessment methods

KNOWLEDGE	ASSESSMENT METHODS
<b>K1:</b> Core: Employer or company values, beliefs and purpose	Professional Discussion
<b>K2:</b> Core: Patient referral processes and procedures and the implications of not following procedures	Professional Discussion
<b>K3:</b> Core: Policies, procedures, and regulated activities within the Optical working environment, such as GDPR, NHS, GOC health and safety and safeguarding	Professional Discussion
<b>K4:</b> Core: Importance of personal presentation, time management and teamwork	Professional Discussion

KNOWLEDGE	ASSESSMENT METHODS
<b>K5:</b> Core: Different customer types and needs within the optical environment	Professional Discussion
<b>K6:</b> Core: Communication principles and techniques used to communicate at work to reduce barriers of communication	Direct Observation of Practice with questions
<b>K7:</b> Core: Wider services that are available to support customers with specific needs such as non-English speaking, non-verbal, profoundly deaf, learning needs	Professional Discussion
<b>K8:</b> Core: Health and safety at work legislation relevant to working in the optical environment, including hygiene and infection control measures and customer safety	Direct Observation of Practice with questions
<b>K9:</b> Core: How to use and maintain optical equipment	Direct Observation of Practice with questions
<b>K10:</b> Core: First aid procedures, accident and incident reporting and evacuation processes	Professional Discussion
<b>K11:</b> Core: The services available to customers in the optical environment such as sight tests, contact lens and extended services including minor eye care services, low vision services and their benefits or limitations	Direct Observation of Practice with questions
<b>K12:</b> Core: The non-prescribed products available to the customer within the optical environment such as contact lens solutions, common ophthalmic drops, ready readers, magnifiers, and other accessories	Professional Discussion
<b>K13:</b> Core: Pre-appointment processes, record keeping (e.g., adhering to relevant legislation when recording and storing personal data) and the principles of gaining consent, including when and how information can be disclosed to a customer or service provider	Direct Observation of Practice with questions
<b>K14:</b> Core: Appointment types, lengths, booking systems and clinic management in the optical environment including NHS exemptions and private appointments	Direct Observation of Practice with questions
<b>K15:</b> Core: Business sight test and contact lens recall requirements	Professional Discussion
<b>K16:</b> Core: Ocular emergencies and when to seek advice, including escalation and reporting procedures	Professional Discussion
<b>K17:</b> Core: Clinic preparation processes such as preparing records, General Ophthalmic Services eligibility and entitlement, identifying customer needs, confirming appointment	Direct Observation of Practice with questions
<b>K18:</b> Core: Product tolerances such as British standards, ISO, UKCA	Report with questioning

KNOWLEDGE	ASSESSMENT METHODS
<b>K19:</b> Core: How to use lens measuring equipment	Direct Observation of Practice with questions
<b>K20:</b> Core: How to recognise engravings such as progressive lenses safety spectacles and remark of lens	Direct Observation of Practice with questions
<b>K21:</b> Core: The structure of the eye, spectacle prescriptions and vision correction options	Direct Observation of Practice with questions
<b>K22:</b> Core: Lens form, types, materials, coatings and their features and benefits	Direct Observation of Practice with questions
<b>K23:</b> Core: Specialised vision correction options such as safety spectacles, sports spectacles, contact lenses, magnifiers and their features and benefits	Professional Discussion
<b>K24:</b> Core: Frame materials, shapes, components and their features and benefits.	Direct Observation of Practice with questions
<b>K25:</b> Core: Frame fitting and suitability including facial, frame and lens measurements and the equipment used to measure these	Direct Observation of Practice with questions
<b>K26:</b> Core: Pricing, promotions and offers, ordering and payment systems and collection options and procedures	Direct Observation of Practice with questions
<b>K27:</b> Core: When to use visual acuity to check near vision and prescription adaption requirements	Direct Observation of Practice with questions
<b>K28:</b> Core: Frame adjustments and the impact of poor fitting on both comfort and vision	Report with questioning
<b>K29:</b> Core: Adjustment tools and equipment used for spectacles	Direct Observation of Practice with questions
<b>K30:</b> Core: Advice and guidance on frame fitting /and or lens care and after sales services for customers	Direct Observation of Practice with questions
<b>K31:</b> Core: Guarantees, warranties available within an optical environment and the legal requirements for consumers	Report with questioning
<b>K32:</b> Core: Employer concern handling policies and procedures and when to escalate complaints such as to the NHS and/or the Optical Consumer Complaints Service (OCCS)	Report with questioning
<b>K33:</b> Core: Employer and manufacturer's remake and repair procedures for spectacles	Report with questioning
<b>K34:</b> Core: Implications of poor fitting on the customer	Report with questioning



KNOWLEDGE	ASSESSMENT METHODS
<b>K35:</b> Core: Implications and impact of incorrect measurements, prescriptions and product recommendations for the customer and business	Report with questioning
<b>K36:</b> Core: Implications and impact of customer concerns and or complaints on the business brand and professional members of staff	Professional Discussion
<b>K37:</b> Core: The principles of continuing professional development and the local arrangements for appraisal in the workplace, such as self- reflection, feedback, career opportunities and target setting	Professional Discussion
<b>K38:</b> Core: Business operating models, targets, and key performance indicators in an optical environment	Professional Discussion
<b>K39:</b> Core: Understand a customer's ability to make decisions on the products they are purchasing (Mental Capacity Act and Best Interest decisions and power of attorney)	Professional Discussion
<b>K40:</b> Core: Understand ocular conditions such as glaucoma, cataracts, macular degeneration, diabetes	Professional Discussion
<b>K41:</b> Core: The equipment used and purpose of different screening tests available within the optical environment, such as auto Refractor, Non-Contact Tonometer, Optical Coherence Tomographer, Visual Fields Screening, Fundus Camera	Professional Discussion
<b>K42:</b> Option 1. Screening Assistant: How to set up and use screening equipment such as pressure tests, visual field tests	Professional Discussion
<b>K43:</b> Option 1. Screening Assistant: Conduct screening test with customer and pass results to optometrist/dispensing optician, and know who to refer to for support or guidance during screening checks	Professional Discussion
<b>K44:</b> Option 1: Screening Assistant: Medical conditions which are screened for, such as glaucoma, cataracts, macular degeneration, diabetes	Professional Discussion
<b>K45:</b> Option 2. Contact Lens Assistant: Contact lens handling, insertion, and removal procedures	Professional Discussion
<b>K46:</b> Option 2. Contact Lens Assistant: Advice and guidance given to customers such as cleaning regime and solution types including wearing schedules and lens care	Professional Discussion
<b>K47:</b> Option 2. Contact Lens Assistant: What to do in an emergency (out of hours)	Professional Discussion



KNOWLEDGE	ASSESSMENT METHODS
<b>K48:</b> Option 3. Domiciliary Optical Assistant: How to independently plan and manage own workload and assess and mitigate risk	Professional Discussion
<b>K49:</b> Option 3. Domiciliary Optical Assistant: How to manage own wellbeing and resources	Professional Discussion
<b>K50:</b> Option 3. Domiciliary Optical Assistant: The importance of team communications when working remotely	Professional Discussion
<b>K51:</b> Option 3. Domiciliary Optical Assistant: Environments they will work in, including patient/ customer types	Professional Discussion
SKILL	ASSESSMENT METHODS
<b>S1:</b> Core: Deliver customer service which aligns with company values, beliefs and purposes	Direct Observation of Practice with questions
<b>S2:</b> Core: Identify when and who to refer to when supervision is required such as ocular emergencies, screening, dispensing and collections of restricted categories	Professional Discussion
<b>S3:</b> Core: Work within the limits of policies, procedures, and regulated activity such as GDPR, NHS, GOC, Health and Safety at Work and safeguarding	Professional Discussion
<b>S4:</b> Core: Follow employer's guidelines and expectations for presentation and team working	Professional Discussion
<b>S5:</b> Core: Identify and meet customer needs within the optical environment	Direct Observation of Practice with questions
<b>S6:</b> Core: Communicate with customers and the optical team to maximise understanding	Direct Observation of Practice with questions
<b>S7:</b> Core: Refer customers needing communication support such as language, hearing, visual or learning difficulties to appropriate services	Professional Discussion
<b>S8:</b> Core: Follow health and safety legislation in the optical environment including customer safety, hygiene, and infection control	Direct Observation of Practice with questions
<b>S9:</b> Core: Follow safe use instructions when using optical equipment such as adjustment tools, screening equipment and measuring equipment	Direct Observation of Practice with questions
<b>S10:</b> Core: Follow procedures and processes for first aid, accident and incident reporting or evacuations	Professional Discussion
<b>S11:</b> Core: Provide the benefits and limitations of the different services (e.g., sight tests, contact lenses) and	Direct Observation of Practice with questions

KNOWLEDGE	ASSESSMENT METHODS
extended services (e.g., minor eye condition services, low vision services) to the customers within the optical environment	
<b>S12:</b> Core: Offer non-prescribed products such as contact lens solutions, common ophthalmic drops, ready readers, magnifiers, and other accessories to customers	Professional Discussion
<b>S13:</b> Core: Select appointments, recall information, appointment types and exemptions on the employer's system, and maintain accurate records, e.g., customer details	Direct Observation of Practice with questions
<b>S14:</b> Core: Report and record ocular emergencies following correct employer procedures	Professional Discussion
<b>S15:</b> Core: Accurately prepare clinical records for use following employer procedures	Direct Observation of Practice with questions
<b>S16:</b> Core: Accurately complete customer pre-appointment procedures	Direct Observation of Practice with questions
<b>S17:</b> Core: Use product tolerances to validate product accuracy	Report with questioning
<b>S18:</b> Core: Use lens measuring equipment to identify prescriptions and lens measurements	Direct Observation of Practice with questions
<b>S19:</b> Core: Identify lens types using engravings such as progressive lenses and safety spectacles and remark lenses where required	Direct Observation of Practice with questions
<b>S20:</b> Core: Interpret the spectacle prescription to identify a range of vision correction options suitable for the customer	Direct Observation of Practice with questions
<b>S21:</b> Core: Offer suitable lens products to the customer based on customer needs and preferences, using features and benefits to highlight suitability	Direct Observation of Practice with questions
<b>S22:</b> Core: Offer specialised products to the customer based on their needs and preferences, using features and benefits to highlight suitability	Professional Discussion
<b>S23:</b> Core: Offer suitable frames to the customer based on their needs and preferences, using features and benefits to highlight suitability	Direct Observation of Practice with questions
<b>S24:</b> Core: Identify frame fitting suitability including facial, frame and spectacle lens measurements required to process spectacle orders for the customer	Direct Observation of Practice with questions

KNOWLEDGE	ASSESSMENT METHODS
<b>S25:</b> Core: Process spectacle orders, payments and arrange collections, offering relevant promotions to the customer where appropriate	Direct Observation of Practice with questions
<b>S26:</b> Core: Identify and check visual acuity for near vision spectacle, explaining adaption as required	Direct Observation of Practice with questions
<b>S27:</b> Core: Fit spectacle frames through the use of questioning, measurements, and tools	Direct Observation of Practice with questions
<b>S28:</b> Core: Use tools correctly to adjust frame without causing damage	Direct Observation of Practice with questions
<b>S29:</b> Core: Provide advice and guidance on frame fitting, lens care and after sales service	Direct Observation of Practice with questions
<b>S30:</b> Core: Identify guarantees and warranties of optical products and adhere to the legal requirements for consumers	Report with questioning
<b>S31:</b> Core: Manage customer concerns and or complaints in line with employer procedures	Report with questioning
<b>S32:</b> Core: Use problem solving techniques to identify concern and or complaint causes	Report with questioning
<b>S33:</b> Core: Communicate with customers to resolve concerns or complaints within the limits of their own authority	Report with questioning
<b>S34:</b> Core: Follow remake procedures	Report with questioning
<b>S35:</b> Core: Follow repair procedures	Report with questioning
<b>S36:</b> Core: Recognise and resolve customer complaints e.g., poor fitting, incorrect measurements, or offer alternative options in line with business requirements	Professional Discussion
<b>S37:</b> Core: Participate in training and development activities to maintain own practice	Professional Discussion
<b>S38:</b> Core: Participate in appraisal, obtain feedback, and use self-reflection to plan further development opportunities and identify available career opportunities to support progression	Professional Discussion
<b>S39:</b> Core: Adapt approach for customers with ocular conditions such as glaucoma, cataracts, macular degeneration, diabetes	Professional Discussion
<b>S40:</b> Option 1: Screening Assistant. Option 1. Screening: Conduct screening using screening equipment and record accurate results	Professional Discussion

KNOWLEDGE	ASSESSMENT METHODS
<b>S41:</b> Option 1: Screening Assistant: Inform the patient about the equipment, processes and procedures used for screening	Professional Discussion
<b>S42:</b> Option 1: Screening Assistant: Gain support or guidance from colleagues during screening when required	Professional Discussion
<b>S43:</b> Option 1: Screening Assistant: Inform the patient that the tests check for medical conditions such as glaucoma, cataracts, macular degeneration, diabetes	Professional Discussion
<b>S44:</b> Option 2: Contact Lens Assistant: Demonstrate contact lens handling and insertion and removal to a patient	Professional Discussion
<b>S45:</b> Option 2: Contact Lens Assistant: Show the patient how to care for their lens	Professional Discussion
<b>S46:</b> Option 2: Contact Lens Assistant: Provide advice and guidance on cleaning of lenses and solution types	Professional Discussion
<b>S47:</b> Option 2: Contact Lens Assistant: Follow out of hours emergency procedures	Professional Discussion
<b>S48:</b> Option 3: Domiciliary Optical Assistant: Recognise a customer's ability to make an informed decision	Professional Discussion
<b>S49:</b> Option 3: Domiciliary Optical Assistant: Tell the customer what the sight test includes and how it is carried out	Professional Discussion
<b>S50:</b> Option 3: Domiciliary Optical Assistant: Work independently to plan and manage workload	Professional Discussion
<b>S51:</b> Option 3: Domiciliary Optical Assistant: Assess and mitigate risk in patient's home to ensure an appropriate eye test can be delivered	Professional Discussion
<b>S52:</b> Option 3: Domiciliary Optical Assistant: Manage own wellbeing and resources	Professional Discussion
<b>S53:</b> Option 3: Domiciliary Optical Assistant: Maintain team communications when working remotely	Professional Discussion
BEHAVIOUR	ASSESSMENT METHODS
<b>B1:</b> Core: Treat people with dignity and respect.	Direct Observation of Practice with questions
<b>B2:</b> Core: Show discretion and empathy for those you work with	Professional Discussion
<b>B3:</b> Core: Be adaptable, reliable and committed	Direct Observation of Practice with questions

BEHAVIOUR	ASSESSMENT METHODS
<b>B4:</b> Core: Be caring and compassionate	Direct Observation of Practice with questions
<b>B5:</b> Core: Show resilience and self-awareness	Professional Discussion
<b>B6:</b> Core: Show openness and integrity at all times	Direct Observation of Practice with questions

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