



OPTICAL ASSISTANT 2022

Details of standard

This standard has options. Display duties and KSBs for:

All



Occupation summary

This occupation is found in the healthcare industry including small practices, large multiple practices, or within a person's home or care facility. It is a support role assisting an Optometrist and/or Dispensing Optician.

The broad purpose of the occupation is to interpret a prescription to identify the appropriate optical device to meet the need of the prescription and customer. To review spectacles for quality, prescription, measurement and accuracy and the effects on the eye and vision. Optical Assistants need to be able to identify the appropriate optical appliance, such as spectacles, contact lenses or magnifiers to meet the individual's needs, and be able to explain the features and benefits of these, using non-technical, customer friendly language. Optical assistants need to be able to problem solve and manage customer expectations ensuring that products meet the specification.

In addition to core knowledge and skills, Optical Assistants will complete specialist knowledge and skills relevant to the optical environment they are working in, choosing from one of the following options:

- Providing screening services to customers (pre-screening)
- Delivering services independently in people's homes or care settings (domiciliary)
- Working with customers with contact lens. (insertion and removal)

In their daily work, an employee in this occupation interacts with:

- Patients, service users and carers
- Other members of the multidisciplinary team, including GPs, optometrists, ophthalmologists, orthoptists and optical assistants
- Administration, management and other non-clinical staff like receptionists and retail managers
- Clinical staff including optometrists and dispensing opticians.

An employee in this occupation will be responsible for:

- Accurately interpreting a prescription and selecting the most appropriate optical appliance.
- Providing accurate and appropriate advice to customers within the scope of their job role.
- Managing clinical appointments.
- Delivering responsive customer experience.
- Using an extensive range of technical equipment and tools to provide optical services.
- The safety and wellbeing of themselves and the customers.
- Collaborating with team members and supporting professional colleagues to provide optical services.

Typical job titles include:

Optical assistant

Core occupation duties

DUTY

Duty 1 Act within the limits of own competence and within agreed ways of working, following the relevant local and national standards, policies, standard operating procedures used in the workplace.

Duty 2 Promote and provide a high level of service and care throughout the customer journey.

Duty 3 Maintain the health, safety and security of yourself, customers and others in the workplace by identifying risks and taking appropriate action to keep people safe.

Duty 4 Identify customer needs and offer the appropriate services and products to meet those needs.

Duty 5 Provide and maintain a triage and appointment booking service for customers.

Duty 6 Provide a pre-appointment service for customers, gaining valid consent.

Duty 7 Review spectacles for quality, prescription and measurement accuracy.

KSBS

K1 K2 K3 K4

S1 S2 S3

B1 B2 B3 B4 B5 B6

K5 K6 K7 K8 K9

S5 S6 S7

B1 B2 B3 B4 B5 B6

K8 K9 K10

S8 S9 S10

B1 B2 B3 B4 B5 B6

K1 K2 K3 K4 K5 K6 K7 K11 K12 K39 K40

S1 S2 S3 S4 S5 S6 S7 S11 S12 S39

B1 B2 B3 B4 B5 B6

K1 K2 K3 K5 K6 K7 K14 K15 K16 K17

S1 S2 S3 S4 S5 S6 S7 S13 S14

B1 B2 B3 B4 B5 B6

K1 K3 K4 K5 K6 K7 K8 K9 K11 K13 K14
K17 K21 K22 K23 K24 K26 K41

S1 S3 S4 S5 S6 S7 S8 S11 S14 S16 S21
S22 S25

B1 B2 B3 B4 B5 B6

K9 K11 K12 K22 K24 K25 K28 K29 K30
K31 K32 K33 K34

S9 S17 S18 S19 S20 S28 S29 S31 S32
S33 S34 S35 S36 S37

B1 B2 B3 B4 B5 B6

Duty 8 Provide a (product recommendation, measurement and fitting) dispensing service for customers requiring spectacles.

K1 K2 K3 K4 K5 K6 K7 K8 K9 K11 K12
K20 K21 K22 K23 K24 K25 K26 K27 K28
K29 K30 K31 K34

S1 S2 S3 S4 S5 S6 S7 S8 S9 S11 S12 S15
S19 S20 S21 S22 S23 S24 S25 S27 S28
S29 S30 S36 S37

B1 B2 B3 B4 B5 B6

Duty 9 Provide a spectacle collection, fitting and adjustment service.

K1 K2 K3 K4 K5 K6 K7 K8 K9 K11 K12
K18 K20 K21 K23 K24 K25 K26 K31 K33
K34 K35

S1 S2 S3 S4 S5 S6 S7 S8 S9 S11 S12 S15
S20 S21 S22 S23 S24 S26 S27 S28 S29
S30 S31 S32 S33 S36

B1 B2 B3 B4 B5 B6

Duty 10 Provide and maintain a concern handling service for customers and manage queries.

K1 K2 K3 K4 K5 K6 K7 K8 K9 K11 K12
K16 K18 K19 K20 K21 K22 K23 K24 K25
K26 K27 K28 K29 K30

S1 S2 S3 S4 S5 S6 S7 S8 S9 S11 S12 S14
S15 S17 S18 S19 S20 S21 S22 S23 S24
S25 S26 S27 S28 S29 S30 S31 S32 S33
S34 S35 S36 S37

B1 B2 B3 B4 B5 B6

Duty 11 Meet personal and business targets and goals on an ongoing basis.

K1 K4 K36 K37 K38

S1 S4 S38

B1 B2 B3 B4 B5 B6

Option duties

Option 1: Screening Assistant duties

DUTY	KSBS
Duty 12 Provide a screening service for customers.	K1 K2 K3 K4 K5 K6 K7 K8 K11 K13 K14 K16 K19 K42 K43 K44 S1 S2 S3 S4 S5 S6 S7 S8 S9 S11 S12 S13 S15 S18 S40 S41 S42 S43 B1 B2 B3 B4 B5 B6

Option 2: Contact Lens Assistant duties

DUTY	KSBS
Duty 13 Provide a contact lens insertion and removal service.	K1 K2 K3 K4 K5 K6 K7 K8 K11 K12 K14 K15 K16 K26 K45 K46 K47 K50 S1 S2 S4 S5 S6 S7 S8 S12 S13 S14 S25 S44 S45 S46 S47 B1 B2 B3 B4 B5 B6

Option 3: Domiciliary Optical Assistant duties

DUTY	KSBS
Duty 14 Provide a service to people in their homes or other care settings (domiciliary care).	K1 K2 K3 K4 K5 K6 K7 K8 K48 K49 K51 S1 S2 S4 S5 S6 S7 S8 S48 S49 S50 S51 S52 S53 B1 B2 B3 B4 B5 B6

KSBS

Knowledge

K1: Employer or company values, beliefs and purpose

K2: Patient referral processes and procedures and the implications of not following procedures

K3: Policies, procedures, and regulated activities within the Optical working environment, such as GDPR, NHS, GOC health and safety and safeguarding

K4: Importance of personal presentation, time management and teamwork

K5: Different customer types and needs within the optical environment

K6: Communication principles and techniques to use to communicate at work to reduce barriers of communication

K7: Wider services that are available to support customers with specific needs such as non-English speaking, non-verbal, profoundly deaf, learning needs

K8: Health and safety at work legislation relevant to working in the optical environment, including hygiene and infection control measures and customer safety

K9: How to use and maintain optical equipment

K10: First aid procedures, accident and incident reporting and evacuation processes

K11: 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

K12: 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

K13: 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

K14: Appointment types, lengths, booking systems and clinic management in the optical environment including NHS exemptions and private appointments

K15: Business sight test and contact lens recall requirements

K16: Ocular emergencies and when to seek advice, including escalation and reporting procedures

K17: Clinic preparation processes such as preparing records, General Ophthalmic Services eligibility and entitlement, identifying customer needs, confirming appointment

K18: Product tolerances such as British standards, ISO, UKCA

K19: How to use lens measuring equipment

K20: How to recognise engravings such as progressive lenses safety spectacles and remark of lens

K21: The structure of the eye, spectacle prescriptions and vision correction options

K22: Lens form, types, materials, coatings and their features and benefits

K23: Specialised vision correction options such as safety spectacles, sports spectacles, contact lenses, magnifiers and their features and benefits

- K24:** Frame materials, shapes, components and their features and benefits.
- K25:** Frame fitting and suitability including facial, frame and lens measurements and the equipment used to measure these
- K26:** Pricing, promotions and offers, ordering and payment systems and collection options and procedures
- K27:** When to use visual acuity to check near vision and prescription adaptation requirements
- K28:** Frame adjustments and the impact of poor fitting on both comfort and vision
- K29:** Adjustment tools and equipment used for spectacles
- K30:** Advice and guidance on frame fitting /and or lens care and after sales services for customers
- K31:** Guarantees, warranties available within an optical environment and the requirements of the Sales of Goods Act
- K32:** Employer concern handling policies and procedures and when to escalate complaints such as to the NHS and/or the Optical Consumer Complaints Service (OCCS)
- K33:** Employer and manufacturer's remake and repair procedures for spectacles
- K34:** Implications of poor fitting on the customer
- K35:** Implications and impact of incorrect measurements, prescriptions and product recommendations for the customer and business
- K36:** Implications and impact of customer concerns and or complaints on the business brand and professional members of staff
- K37:** 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
- K38:** Business operating models, targets, and key performance indicators in an optical environment
- K39:** 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)
- K40:** Understand ocular conditions such as glaucoma, cataracts, macular degeneration, diabetes
- K41:** 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
- K42:** How to set up and use screening equipment such as pressure tests, visual field tests
- K43:** 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

K44: Medical conditions which are screened for, such as glaucoma, cataracts, macular degeneration, diabetes

K45: Contact lens handling, insertion, and removal procedures

K46: Advice and guidance given to customers such as cleaning regime and solution types including wearing schedules and lens care

K47: What to do in an emergency (out of hours)

K48: How to independently plan and manage own workload and assess and mitigate risk

K49: How to manage own wellbeing and resources

K50: The importance of team communications when working remotely

K51: Environments they will work in, including patient/ customer types

Skills

S1: Deliver customer service which aligns with company values, beliefs and purposes

S2: Identify when and who to refer to when supervision is required such as ocular emergencies, screening, dispensing and collections of restricted categories

S3: Work within the limits of policies, procedures, and regulated activity such as GDPR, NHS, GOC, Health and Safety at Work and safeguarding

S4: Follow employer's guidelines and expectations for presentation and team working

S5: Identify and meet customer needs within the optical environment

S6: Communicate with customers and the optical team to maximise understanding

S7: Refer customers needing communication support such as language, hearing, visual or learning difficulties to appropriate services

S8: Follow health and safety legislation in the optical environment including customer safety, hygiene, and infection control

S9: Follow safe use instructions when using optical equipment such as adjustment tools, screening equipment and measuring equipment

S10: Follow procedures and processes for first aid, accident and incident reporting or evacuations

S11: Provide the benefits and limitations of the different services (e.g. sight tests, contact lenses) and extended services (e.g. minor eye condition services, low vision services) to the customers within the optical environment

S12: Offer non-prescribed products such as contact lens solutions, common ophthalmic drops, ready readers, magnifiers, and other accessories to customers

- S13:** Select appointments, recall information, appointment types and exemptions on the employer's system, and maintain accurate records, e.g. customer details
- S14:** Report and record ocular emergencies following correct employer procedures
- S15:** Accurately prepare clinical records for use following employer procedures
- S16:** Accurately complete customer pre-appointment procedures
- S17:** Use product tolerances to validate product accuracy
- S18:** Use lens measuring equipment to identify prescriptions and lens measurements
- S19:** Identify lens types using engravings such as progressive lenses and safety spectacles and remark lenses where required
- S20:** Interpret the spectacle prescription to identify a range of vision correction options suitable for the customer
- S21:** Offer suitable lens products to the customer based on customer needs and preferences, using features and benefits to highlight suitability
- S22:** Offer specialised products to the customer based on their needs and preferences, using features and benefits to highlight suitability
- S23:** Offer suitable frames to the customer based on their needs and preferences, using features and benefits to highlight suitability
- S24:** Identify frame fitting suitability including facial, frame and spectacle lens measurements required to process spectacle orders for the customer
- S25:** Process spectacle orders, payments and arrange collections, offering relevant promotions to the customer where appropriate
- S26:** Identify and check visual acuity for near vision spectacle, explaining adaption as required
- S27:** Fit spectacle frames through the use of questioning, measurements, and tools
- S28:** Use tools correctly to adjust frame without causing damage
- S29:** Provide advice and guidance on frame fitting, lens care and after sales service
- S30:** Identify guarantees and warranties of optical products and adhere to the Sales of Good Act
- S31:** Manage customer concerns and or complaints in line with employer procedures
- S32:** Use problem solving techniques to identify concern and or complaint causes
- S33:** Communicate with customers to resolve concerns or complaints within the limits of their own authority

S34: Follow remake procedures

S35: Follow repair procedures

S36: Recognise and resolve customer complaints e.g. poor fitting, incorrect measurements, or offer alternative options in line with business requirements

S37: Participate in training and development activities to maintain own practice

S38: Participate in appraisal, obtain feedback, and use self-reflection to plan further development opportunities and identify available career opportunities to support progression

S39: Adapt approach for customers with ocular conditions such as glaucoma, cataracts, macular degeneration, diabetes

S40: Conduct screening using screening equipment and record accurate results

S41: Inform the patient about the equipment, processes and procedures used for screening

S42: Gain support or guidance from colleagues during screening when required

S43: Inform the patient that the tests check for medical conditions such as glaucoma, cataracts, macular degeneration, diabetes

S44: Demonstrate contact lens handling and insertion and removal to a patient

S45: Show the patient how to care for their lens

S46: Provide advice and guidance on cleaning of lenses and solution types

S47: Follow out of hours emergency procedures

S48: Recognise a customer's ability to make an informed decision

S49: Tell the customer what the sight test includes and how it is carried out

S50: Work independently to plan and manage workload

S51: Assess and mitigate risk in patient's home to ensure an appropriate eye test can be delivered

S52: Manage own wellbeing and resources

S53: Maintain team communications when working remotely

Behaviours

B1: Treat people with dignity and respect.

B2: Show discretion and empathy for those you work with

B3: Be adaptable, reliable and committed

B4: Be caring and compassionate

B5: Show resilience and self-awareness

B6: Show openness and integrity at all times

Qualifications

English and Maths

Apprentices without level 2 English and maths will need to achieve this level prior to taking the End-Point Assessment. For those with an education, health and care plan or a legacy statement, the apprenticeship's English and maths minimum requirement is Entry Level 3. A British Sign Language (BSL) qualification is an alternative to the English qualification for those whose primary language is BSL.

Additional details

Occupational Level:

3

Duration (months):

18

Review

Version log

VERSION	CHANGE DETAIL	EARLIEST START DATE	LATEST START DATE	LATEST END DATE
1.0	Approved for delivery	01/01/2023	Not set	Not set