Standard
L3: Optical assistant

Institute for Apprenticeships & Technical Education

UOS reference number
ST0530_V1.1

Title of occupation
Optical assistant

Core and options
Yes

Resubmission
No

Level of occupation
Level 3

Route
Health and science

Typical duration of apprenticeship
18 months

Target date for approval
01 December 2021

Occupational profile

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
['Optical Assistant']

Core duties

Institute for Apprenticeships & Technical Education

Duty	Knowledge	Skills	Behaviours
D1: 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.	K1, K2, K3, K4	S1, S2, S3	B1, B2, B3, B4, B5, B6
D2: Promote and provide a high level of service and care throughout the customer journey.	K5, K6, K7, K8, K9	S5, S6, S7	B1, B2, B3, B4, B5, B6
D3: 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.	K8, K9, K10	S8, S9, S10	B1, B2, B3, B4, B5, B6
D4: Identify customer needs and offer the appropriate services and products to meet those needs.	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
D5: Provide and maintain a triage and appointment booking service for customers.	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
D6: Provide a pre-appointment service for customers, gaining valid consent.	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
D7: Review spectacles for quality, prescription and measurement accuracy.	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
D8: 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
D9: 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
D10: 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
D11: 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 1: Option 1: Screening Assistant

Institute for Apprenticeships & Technical Education

Duty	Knowledge	Skills	Behaviours
D12: 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: Option 2: Contact Lens Assistant

Institute for Apprenticeships & Technical Education

Duty	Knowledge	Skills	Behaviours
D13: 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: Option 3: Domiciliary Optical Assistant

Institute for Apprenticeships & Technical Education

Duty	Knowledge	Skills	Behaviours
D14: 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

Knowledge

K1: Core: Employer or company values, beliefs and purpose

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

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

K4: Core: Importance of personal presentation, time management and teamwork

K5: Core: Different customer types and needs within the optical environment

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

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

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

K9: Core: How to use and maintain optical equipment

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

K11: 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

K12: 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

K13: 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

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

K15: Core: Business sight test and contact lens recall requirements

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

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

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

K19: Core: How to use lens measuring equipment

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

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

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

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

K24: Core: Frame materials, shapes, components and their features and benefits.

K25: Core: Frame fitting and suitability including facial, frame and lens measurements and the equipment used to measure these

K26: Core: Pricing, promotions and offers, ordering and payment systems and collection options and procedures

K27: Core: When to use visual acuity to check near vision and prescription adaption requirements

K28: Core: Frame adjustments and the impact of poor fitting on both comfort and vision

K29: Core: Adjustment tools and equipment used for spectacles

K30: Core: Advice and guidance on frame fitting /and or lens care and after sales services for customers

K31: Core: Guarantees, warranties available within an optical environment and the requirements of the Sales of Goods Act

K32: 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)

K33: Core: Employer and manufacturer's remake and repair procedures for spectacles

K34: Core: Implications of poor fitting on the customer

K35: Core: Implications and impact of incorrect measurements, prescriptions and product recommendations for the customer and business

K36: Core: Implications and impact of customer concerns and or complaints on the business brand and professional members of staff

K37: 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

K38: Core: Business operating models, targets, and key performance indicators in an optical environment

K39: 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)

K40: Core: Understand ocular conditions such as glaucoma, cataracts, macular degeneration, diabetes

K41: 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

K42: Option 1. Screening: How to set up and use screening equipment such as pressure tests, visual field tests

K43: Option 1. Screening: 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: Option 1: Medical conditions which are screened for, such as glaucoma, cataracts, macular degeneration, diabetes

K45: Option 2. Contact Lens: Contact lens handling, insertion, and removal procedures

K46: Option 2. Contact Lens: Advice and guidance given to customers such as cleaning regime and solution types including wearing schedules and lens care

K47: Option 2. Contact Lens: What to do in an emergency (out of hours)

K48: Option 3. Domiciliary: How to independently plan and manage own workload and assess and mitigate risk

K49: Option 3. Domiciliary: How to manage own wellbeing and resources

K50: Option 3. Domiciliary: The importance of team communications when working remotely

K51: Option 3. Domiciliary: Environments they will work in, including patient/ customer types

Skills

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

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

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

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

S5: Core: Identify and meet customer needs within the optical environment

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

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

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

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

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

S11: Core: 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: Core: Offer non-prescribed products such as contact lens solutions, common ophthalmic drops, ready readers, magnifiers, and other accessories to customers

S13: Core: Select appointments, recall information, appointment types and exemptions on the employer's system, and maintain accurate records, e.g. customer details

S14: Core: Report and record ocular emergencies following correct employer procedures

S15: Core: Accurately prepare clinical records for use following employer procedures

S16: Core: Accurately complete customer pre-appointment procedures

S17: Core: Use product tolerances to validate product accuracy

S18: Core: Use lens measuring equipment to identify prescriptions and lens measurements

S19: Core: Identify lens types using engravings such as progressive lenses and safety spectacles and remark lenses where required

S20: Core: Interpret the spectacle prescription to identify a range of vision correction options suitable for the customer

S21: Core: Offer suitable lens products to the customer based on customer needs and preferences, using features and benefits to highlight suitability

S22: Core: Offer specialised products to the customer based on their needs and preferences, using features and benefits to highlight suitability

S23: Core: Offer suitable frames to the customer based on their needs and preferences, using features and benefits to highlight suitability

S24: Core: Identify frame fitting suitability including facial, frame and spectacle lens measurements required to process spectacle orders for the customer

S25: Core: Process spectacle orders, payments and arrange collections, offering relevant promotions to the customer where appropriate

S26: Core: Identify and check visual acuity for near vision spectacle, explaining adaption as required

S27: Core: Fit spectacle frames through the use of questioning, measurements, and tools

S28: Core: Use tools correctly to adjust frame without causing damage

S29: Core: Provide advice and guidance on frame fitting, lens care and after sales service

S30: Core: Identify guarantees and warranties of optical products and adhere to the Sales of Good Act

S31: Core: Manage customer concerns and or complaints in line with employer procedures

S32: Core: Use problem solving techniques to identify concern and or complaint causes

S33: Core: Communicate with customers to resolve concerns or complaints within the limits of their own authority

S34: Core: Follow remake procedures

S35: Core: Follow repair procedures

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

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

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

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

S40: Option 1. Screening: Conduct screening using screening equipment and record accurate results

S41: Option 1. Screening: Inform the patient about the equipment, processes and procedures used for screening

S42: Option 1. Screening: Gain support or guidance from colleagues during screening when required

S43: Option 1: Inform the patient that the tests check for medical conditions such as glaucoma, cataracts, macular degeneration, diabetes

S44: Option 2. Contact Lens: Demonstrate contact lens handling and insertion and removal to a patient

S45: Option 2. Contact Lens: Show the patient how to care for their lens

S46: Option 2. Contact Lens: Provide advice and guidance on cleaning of lenses and solution types

S47: Option 2. Contact Lens: Follow out of hours emergency procedures

S48: Option 3. Domiciliary: Recognise a customer's ability to make an informed decision

S49: Option 3. Domiciliary: Tell the customer what the sight test includes and how it is carried out

S50: Option 3. Domiciliary: Work independently to plan and manage workload

S51: Option 3. Domiciliary: Assess and mitigate risk in patient's home to ensure an appropriate eye test can be delivered

S52: Option 3. Domiciliary: Mange own wellbeing and resources

S53: Option 3. Domiciliary: Maintain team communications when working remotely

Behaviours

B1: Core: Treat people with dignity and respect.

B2: Core: Show discretion and empathy for those you work with

B3: Core: Be adaptable, reliable and committed

B4: Core: Be caring and compassionate

B5: Core: Show resilience and self-awareness

B6: Core: Show openness and integrity at all times

Duty	OTJ days
D1: 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.	0
D2: Promote and provide a high level of service and care throughout the customer journey.	0
D3: 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.	0
D4: Identify customer needs and offer the appropriate services and products to meet those needs.	0
D5: Provide and maintain a triage and appointment booking service for customers.	0
D6: Provide a pre-appointment service for customers, gaining valid consent.	0
D7: Review spectacles for quality, prescription and measurement accuracy.	0
D8: Provide a (product recommendation, measurement and fitting) dispensing service for customers requiring spectacles.	0
D9: Provide a spectacle collection, fitting and adjustment service.	0
D10: Provide and maintain a concern handling service for customers and manage queries.	0
D11: Meet personal and business targets and goals on an ongoing basis.	0
D12: Provide a screening service for customers.	0
D13: Provide a contact lens insertion and removal service.	0
D14: Provide a service to people in their homes or other care settings (domiciliary care).	0

Additional information

Entry requirements

No entry requirements specified

Professional recognition

No professional body recognition specified

Rationale for no professional recognition

n/a

Progression routes

No progression routes specified

Progression routes comments

Dispensing Optician.

Notice period

90 days

Notice period comments

To enable trainign providers to make necessary changes to the on-programme delivery and for EPAOs to make changes to EPA.