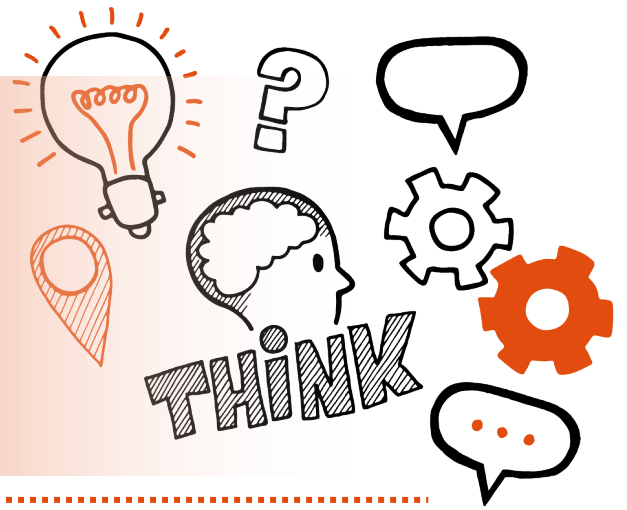# Think about
Professional discussion
Level 3 ST1377 Optical
Assistant v1.1

On the day of this assessment you will carry out:

A 60-minute professional discussion

Face-to-face or via online videoconferencing

Under exam conditions

With an end-point assessor

Key point

You must prepare for the professional discussion by considering how you will meet the required criteria.

Do

- Review the criteria associated with the professional discussion, this can be found in the EPA kit
- Review relevant legislation, regulations and your organisation's policies and procedures
- Have copies of your notes available, remember these should be brief and not paragraphs of information
- Make sure you have a quiet room available
- Inform your colleagues about the assessment and remind them that you can't be disturbed or interrupted
- Provide clear and concise answers to the questions that you are asked

Don't

- Take any textbooks, workbooks or organisational materials into the assessment
- Provide unnecessary information
- Forget to plan

Next steps

- Results can take up to 7 working days to be confirmed
- Your manager or training provider will inform you of the results

Resits

- If you do not achieve a pass result on the professional discussion you can resit the assessment.

Use the table below to plan and prepare for the professional discussion.

(P) indicates pass criteria

(D) indicates distinction criteria

Assessment criteria	Key points to remember
Procedures and compliance	
(P) Explain how to adhere to patient referral policies, procedures and regulation and the implications of not following procedures. Identify when and who to refer to when supervision is required for ocular emergencies, screening, dispensing and collection restrictions. Accurately report and record ocular emergencies in line with employer procedures. Work within the limits of local and national policies (K2, K3, K16, S2, S3, S14)	
(P) Explain the first aid reporting and evacuation procedures in the workplace and who to refer to and how to safely evacuate the store (K10, S10)	
(D) Explain the implications of not following policies and procedures on your colleagues and the impact on brand reputation (K2, K3, S2, S3)	

(D) Explain how to mitigate risks of accidents or incidents based on past examples (K10, S10)	

Company beliefs and values	
(P) Explain the company's beliefs, values and purpose and why personal presentation, time management and team working can impact these and how you have shown discretion and empathy to colleagues (K1, K4, S4, B2)	
(D) Evaluate how company beliefs and values have been used to make recommendations to improve the service levels and the customer experience (K1, K4, S4)	

Customer types, needs and the services available	
(P) Explain the importance of identifying and adapting to customer needs. Explain 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) Explain how to adapt customer service when dealing with customers with ocular conditions such as glaucoma, cataracts, macular degeneration, diabetes (K40, S39)	
(P) Explain how a customer's ability to make a purchasing decision is made and who to involve under the Mental Capacity Act etc (K39)	
(P) Explain the purpose of the equipment used and the purpose of different screening tests available within the optical environment (K41)	
(D) Evaluate the nonprescribed products available and identify additions that may support specific customer types and make recommendations for improvements to products/services (K5, K7, K12, K23, S7, S12, S22)	

Appointment booking procedures

(P) Describe the business sight test and contact lens recall requirements (K15)	
(D) Explain the benefits of different methods of recall (K15)	

The impact of customer concerns

(P) Give an example of how you 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)	
(D) Describe the impact of customer concerns on the brand and brand reputation and make recommendations to reduce complaints (K36)	

Business models and KPI's

(P) Explain how you use the sales targets and KPI's for the business/team to support individual targets (K38)	
(D) Describe how you have influenced sales targets and worked with colleagues to achieve them (K38)	

Personal development

(P) Explain the importance of reflection and participation in training and development opportunities to maintain own continuous practice and continue to show resilience and self-awareness. Explain the importance of participating in appraisal to plan for future development and career opportunities (K37, S37, S38, B5)	
(D) Identify your future development opportunities and goals and how you plan to achieve these (K37, S38)	

Contact lens assistant

(P) Describe how you inform the patient about contact lens handling, insertion and removal and how to clean, care and store them (K45, K46, S44, S45, S46)	
(P) Explain what to do in an emergency outside of store opening hours (K47, S47)	
(D) Make recommendations to improve the procedures for contact lens insertion and removal and train colleagues to use them (K45, S45)	

Domiciliary optical assistant

(P) Explain how you independently manage your workload, assess and mitigate risk for different environments, patients and customers to deliver eye tests. Explain how you tell the customer what the sight test includes and how it is carried out (K48, K51, S49, S50, S51)	

(P) Explain how you recognise a customer's ability to make an informed decision (S48)	
(P) Explain the importance of communicating with the team when working remotely and managing own resources and wellbeing (K49, K50, S52, S53)	
(D) Make recommendations on working independently and train colleagues to gain independence (K49, K50, S52, S53)	
Screening assistant	
(P) Outline the screening procedures which are explained to the patient, including the equipment used and the medical conditions it checks for. Explain how a range of screening checks are completed and results accurately recorded. Describe how screening supports the optician (K42, K44, S40, S41, S43)	

(P) Explain 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)	
(D) Make recommendations to improve the processes and procedures for screening and share and train colleagues to use them (S41)	

V4.0