

Highfield Level 2 End-Point Assessment for ST0539 Optical Assistant

Mock Assessment Materials

Direct Observation & Professional Discussion Criteria

| Health & Safety | | Direct Observation | | Professional Discussion | |
|-----------------|---|--------------------|----------------------|-------------------------|----------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed | Passed | Attempted not passed |
| HS1 | Demonstrate their ability to follow safe working practices | | | | |
| HS2 | Ensure customers, colleagues and self are safe within limits of own influence | | | | |
| Ref | Assessment Criteria (Distinction) | Passed | Attempted not passed | Passed | Attempted not passed |
| HS3 | Explain to their customers the health and safety precautions taken to ensure safety | | | | |

| Materials of frames and lenses | | Direct Observation | | Professional Discussion | |
|--------------------------------|--|--------------------|----------------------|-------------------------|----------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed | Passed | Attempted not passed |
| MF1 | Use a range of suitable questions to identify customer's needs | | | | |
| MF2 | Recommend suitable products based on customer requirements | | | | |
| MF3 | Explain the features of chosen products | | | | |

| Ref | Assessment Criteria (Distinction) | Passed | Attempted not passed | Passed | Attempted not passed |
|-----|--|--------|----------------------|--------|----------------------|
| MF4 | Able to respond positively to customer concerns about the products recommended - utilising the benefits of the products | | | | |
| MF5 | Provides alternative product recommendations based on customer's needs and wants | | | | |
| MF6 | Makes clear links between recommended products and the customer's needs. Explains the benefits of the products recommended | | | | |

| Tools and equipment | | Direct Observation | | Professional Discussion | |
|---------------------|--|--------------------|----------------------|-------------------------|----------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed | Passed | Attempted not passed |
| TE1 | Use either a manual or automatic focimeter | | | | |
| TE2 | Accurately take and use basic spectacle frame measurements to include at least length to bend as appropriate to the adjustment required | | | | |
| TE3 | Identify and correctly use tools and resources relevant to the customer interaction | | | | |
| TE4 | Correctly use facial measuring equipment to take pupil distances and heights as appropriate | | | | |
| Ref | Assessment Criteria (Distinction) | Passed | Attempted not passed | Passed | Attempted not passed |
| TE5 | Use either a manual or automatic focimeter to accurately measure prescriptions and lens measurements for single vision, bifocal and varifocals | | | | |
| TE6 | Uses a range of tools to make correct adjustments to spectacle frames | | | | |
| TE7 | Explains the range of tools and adjustments being made in a customer-friendly manner | | | | |

| Quality and governance | | Direct Observation | | Professional Discussion | |
|------------------------|--|--------------------|----------------------|-------------------------|----------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed | Passed | Attempted not passed |
| QG1 | Follow company data protection/GDPR and confidentiality policies | | | | |
| QG2 | Accurately complete all records required for your customers | | | | |
| QG3 | Follow procedures for supervision, if required, during the observation (if not observed, assessor to ensure this is covered in the PD) | | | | |
| Ref | Assessment Criteria (Distinction) | Passed | Attempted not passed | Passed | Attempted not passed |
| QG4 | Clearly explaining the processes and procedures you are following to your customer when completing records and maintaining confidentiality and data protection | | | | |

| Screening checks | | Direct Observation | | Professional Discussion | |
|------------------|--|--------------------|----------------------|-------------------------|----------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed | Passed | Attempted not passed |
| SC1 | Complete a range of screening checks to include field screening, ensuring customers understand the purpose and procedure | | | | |
| SC2 | Demonstrate safe use of screening equipment to include procedures for hygiene and comfort | | | | |
| SC3 | Accurate completion of customer records relating to screening checks | | | | |
| SC4 | Reassure customers throughout the screening process and clearly explain next steps | | | | |

| Customer interactions, dispensing, fitting and adjustment of spectacles | | Direct Observation | | Professional Discussion | |
|---|--|--------------------|----------------------|-------------------------|----------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed | Passed | Attempted not passed |
| CI1 | Use questions to identify customer needs | | | | |
| CI2 | Offer suitable products to meet your customer's needs, explaining the features using available resources | | | | |
| CI3 | Explain suitable offers and their features | | | | |
| CI4 | Identify and select appropriate frames and lenses based on customer requirements, ensuring accurate fit and correct lens choice | | | | |
| CI5 | Ensure good frame fitting, suitability and availability | | | | |
| CI6 | Accurately take appropriate frame and spectacle lens measurements using available technologies to include PDs and vertical heights if required | | | | |
| CI7 | Accurately record order details and explain collection procedures relevant to your customer and the business | | | | |
| CI8 | Complete the sales transaction according to company requirements | | | | |
| CI9 | Greet customers - follow company procedures | | | | |
| CI10 | Confirm customer's details and collection requirement | | | | |
| CI11 | Inform the customer of the collection process and procedures in line with company standards | | | | |
| CI12 | Accurately check frame fit | | | | |
| CI13 | Accurately check visual acuity based on the prescription requirements | | | | |

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| CI14 | Explain after sales services in line with company standards | | | | |
| Ref | Assessment Criteria (Distinction) | Passed | Attempted not passed | Passed | Attempted not passed |
| CI15 | Use a range of questions and communication methods to identify customer needs | | | | |
| CI16 | Clearly identifying common ground and being able to maintain new or existing relationships | | | | |
| CI17 | Adapting communication needs to meet and exceed the requirements of your customer | | | | |
| CI18 | Clearly identifying and making multiple recommendations to the customer that clearly explain the features and benefits that are relevant to the customer's needs | | | | |
| CI19 | Give a range of offers exploring these with your customer to identify the best option for them | | | | |
| CI20 | Identify and select appropriate frames and lenses based on customer requirements, ensuring accurate fit and correct lens choice, and giving clear and detailed explanations to your customer as to why the choices are best suited for them | | | | |
| CI21 | Offering a range of suitable frames to your customer based on their specific requirement and prescription needs | | | | |
| CI22 | Correctly use facial measurement equipment to take pupil distances, BVD, heights and pantoscopic angle, clearly explaining how and why these measurements are required and the implications of incorrect measurements | | | | |
| CI23 | Maintaining a high level of rapport and interest in the customer throughout the dispensing process | | | | |
| CI24 | Clearly explain and confirm the order details reinforcing the features, benefits and process with your customer | | | | |
| CI25 | Actively discuss and recommend additional products for care of spectacles. Recommend other suitable products and services as appropriate to the store and the customer | | | | |

| Professionalism | | Direct Observation | | Professional Discussion | |
|-----------------|---|--------------------|----------------------|-------------------------|----------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed | Passed | Attempted not passed |
| PR1 | Maintain appropriate presentation and dress code in line with company standards | | | | |
| PR2 | Actively promote the beliefs and values of the company | | | | |
| PR3 | Exhibit a positive and approachable attitude to customers and colleagues | | | | |
| Ref | Assessment Criteria (Distinction) | Passed | Attempted not passed | Passed | Attempted not passed |
| PR4 | Customer expectations are exceeded consistently | | | | |

| Safety orientated | | Direct Observation | | Professional Discussion | |
|-------------------|---|--------------------|----------------------|-------------------------|----------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed | Passed | Attempted not passed |
| SO1 | Follow safe working practices with all equipment used | | | | |
| SO2 | Ensure customers, colleagues and self are safe | | | | |
| Ref | Assessment Criteria (Distinction) | Passed | Attempted not passed | Passed | Attempted not passed |
| SO3 | Actively promote health and safety through safe working practices by ensuring a safe working environment inside and outside of own area of responsibility | | | | |
| SO4 | Respond to and report any identified risks within the limits of their own work area | | | | |

| Health & Safety | | Professional Discussion | |
|-----------------|---|-------------------------|----------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed |
| HS6 | Show an understanding of health and safety processes and procedures within the workplace environment | | |
| HS7 | Explain procedures in place relating to health and safety to include the use of equipment and ensuring customer safety | | |
| HS8 | Explain the company procedures and processes for reporting of accidents and emergencies and carrying out evacuations | | |
| HS9 | Identify first-aiders, fire wardens, first-aid boxes, etc. | | |
| Ref | Assessment Criteria (Distinction) | Passed | Attempted not passed |
| HS10 | Show detailed knowledge of what and how procedures are put in place to ensure a safe working environment and to comply with the Health and Safety at Work Act | | |
| HS11 | Explain potential risks and hazards to self and customer, and the actions needed to rectify | | |
| HS12 | Know how and where to report hazards according to company policies | | |
| HS13 | Have a sound understanding of the evacuation process | | |
| HS14 | Explain the use of Personal Protective Equipment (PPE) relevant to the company and your role | | |

| Materials of frames and lenses | | Professional Discussion | |
|--------------------------------|---|-------------------------|----------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed |
| MF11 | Explain the features of 3 frame materials | | |
| MF12 | Explain the features of 3 lens materials and/or coatings | | |
| MF13 | Explain allergic reactions that may occur with frame materials | | |
| MF14 | Have a basic understanding of the legal requirements of coatings, tints and safety glasses (if not covered in case study) | | |
| MF15 | Explain the relationship between frame fit and suitability to include frame sizing, pupil distances and lens thickness | | |
| Ref | Assessment Criteria (Distinction) | Passed | Attempted not passed |
| MF16 | Explain the benefits of 3 frame materials | | |
| MF17 | Explain the benefits of 3 lens materials and or coatings | | |
| MF18 | Explains the benefits of a range of additional specialist products within the employer's range e.g. safety spectacles, sports spectacles, occupational lenses or contact lenses | | |

| Tools and equipment | | Professional Discussion | |
|---------------------|--|-------------------------|----------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed |
| TE14 | Explain company processes and procedures if products are damaged and/or broken during adjustment or repair | | |
| TE15 | Explains criteria to check fitting and adjustments | | |

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| TE16 | Explain how and when 3 different tools would be used in the adjustment | | |
| TE17 | Explain the purpose and uses of screening equipment in the customer journey | | |
| Ref | Assessment Criteria (Distinction) | Passed | Attempted not passed |
| TE18 | Can explain the use of the correct tools and process and the benefits of these | | |
| TE19 | Explain the use of BS tolerances to ensure spectacle prescription accuracy | | |

| Quality and governance | | Professional Discussion | |
|------------------------|---|-------------------------|-----------------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed |
| QG6 | Explain what you are or not allowed to do according to GOC policy | | |
| QG7 | Explain NHS regulations and voucher usage for GOS 1-3 | | |
| QG8 | Explain GOC policies and procedures, and the requirements of supervision and the potential impact of not following these policies on self | | |
| QG9 | Explain your role in adhering to the Data Protection Act/GDPR | | |
| Ref | Assessment Criteria (Distinction) | Passed | Attempted not passed |
| QG10 | Explain the impact of not following NHS policies and procedures and the importance of the NHS as a customer | | |
| QG11 | Can explain company procedures and policies to ensure adherence to the Data Protection Act/GDPR including sub-policies, (social media policies, etc.) | | |
| QG12 | Able to identify who can conduct what tasks in accordance with GOC policies and procedures | | |

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| QG13 | Explain the legal requirements governing the sale of optical products as stipulated in the Opticians Act | | |
| QG14 | Explain GOC policies and procedures, and the requirements of supervision and the impact of not following these policies on self, supervising colleague and the wider business | | |

| Screening checks | | Professional Discussion | |
|------------------|---|-------------------------|----------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed |
| SC5 | Explain why pre-screening checks are carried out | | |
| SC6 | Explain the ocular conditions that are detected during pre-screening | | |
| SC7 | Explain when to refer to a qualified professional during pre-screen activities | | |
| SC8 | Explain the screening process in a customer-friendly manner (if not sufficiently covered during observation) | | |
| SC9 | Explain how you could reassure customers during the screening process | | |
| Ref | Assessment Criteria (Distinction) | Passed | Attempted not passed |
| SC10 | Knowledge of eye and medical conditions screened for, e.g. glaucoma, macular degeneration, diabetes, and can explain symptoms and treatment for at least two of the conditions listed | | |

| Customer interactions, dispensing, fitting and adjustment of spectacles | | Professional Discussion | |
|---|--|-------------------------|----------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed |
| CI42 | Explain a minimum of 3 communication barriers that may be faced and the different communication methods that could be used to overcome these | | |
| CI43 | Describe myopia, hypermetropia, presbyopia and astigmatism in a customer-friendly way | | |
| CI44 | Explain the instruments that are used to take accurate measurements for all vision types not covered in the observation (assessor to ensure that single vision and multifocal lenses and prescriptions up to +/-10 are included) | | |
| CI45 | Explain the components of a written prescription to include sphere/cyl/axis/near add | | |
| CI46 | Explain the safety precautions taken when taking measurements in close proximity to a customer | | |
| CI47 | Explain how near visual acuity is checked during spectacle collection | | |
| Ref | Assessment Criteria (Distinction) | Passed | Attempted not passed |
| CI48 | Explain why it is important to identify and overcome barriers to communication | | |
| CI49 | Explain how effective questioning supports product recommendations and product choices | | |
| CI50 | Explain the different defects of vision customers may have, and how these affect product choice and recommendations | | |
| CI51 | Explain why pantoscopic angle and back vertex distance are important during dispensing | | |
| CI52 | Explain how frame sizing affects overall fit and suitability | | |
| CI53 | Explain why and how near visual acuity is checked at collection and its importance in managing customer expectations | | |

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| CI54 | Explain the meaning of near visual acuity and how this is used during the collection process. Explain the components of a written prescription to include sphere/cyl/axis/near add/visual acuity and back vertex distance | | |
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| Professionalism | | Professional Discussion | |
|-----------------|---|-------------------------|----------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed |
| PR5 | Explain how own attitude can impact on customers and colleagues and the brand | | |
| PR6 | Explain how you maintain a professional standard in appearance and attitude in accordance with company standards | | |
| Ref | Assessment Criteria (Distinction) | Passed | Attempted not passed |
| PR7 | Explain how own attitude can impact on customers and colleagues giving examples. Understanding how the Equality Act impacts on the employer's environment and can give examples | | |

| Self-development | | Professional Discussion | |
|------------------|--|-------------------------|----------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed |
| SD1 | Explain how self-development has been managed | | |
| SD2 | Describe how colleagues and training providers have been used to support self-development | | |
| SD3 | Explain how feedback has been used to help plan and improve own ability | | |
| SD4 | Explain how relationships have been maintained with their employer to enable successful completion of the learning journey | | |
| SD5 | Can explain one area of continued development | | |

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| SD6 | Is aware of next steps in their career opportunities | | |
| Ref | Assessment Criteria (Distinction) | Passed | Attempted not passed |
| SD7 | Can identify multiple areas of self-development | | |
| SD8 | Has taken steps to plan/think about future career and next steps | | |

| Safety orientated | | Professional Discussion | |
|--------------------------|---|--------------------------------|-----------------------------|
| Ref | Assessment Criteria (Pass) | Passed | Attempted not passed |
| SO5 | Explains safe working practices with all equipment used | | |
| SO6 | Ensure customers, colleagues and self are safe | | |
| SO7 | Explain how to report any identified risks | | |
| Ref | Assessment Criteria (Distinction) | Passed | Attempted not passed |
| SO8 | Explain how to positively encourage colleagues to follow safe working practices | | |