

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				

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		
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		
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		

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		
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		