

# Highfield Level 2 End-point Assessment for Optical Assistant

## Witness Testimony and Case Study Guidance

### Practical Observation

The following COVID-19 temporary discretion has been agreed until further notice.

**The direct observation may be replaced with a witness testimony supported by a 45-minute question and answer session. The witness testimony must be completed by an occupationally competent person who is working at a line management level above that of the apprentice. They must have also worked with the apprentice on at least 3 occasions within the last 3 months of learning.**

The witness testimony provided must cover the assessment criteria that would normally be attempted during the direct observation, including criteria that may be carried over to the professional discussion. This includes pass and distinction assessment criteria from the following areas.

- Health & Safety
- Materials of frames and lenses
- Tools and equipment
- Quality and governance
- Screening checks
- Customer interactions, dispensing, fitting and adjustment of spectacles
- Professionalism
- Safety orientated

A breakdown of the criteria to be covered is included at the end of this document.

The witness testimony provided must be completed by an occupationally competent person who is working at a line management level above that of the apprentice and they must have worked with the apprentice on at least 3 occasions within the last 3 months of learning.

The witness testimony must be clearly mapped to the assessment criteria. We have provided a template to use for the witness testimony however, you can submit your own documents provided they contain the declaration statement as provided on the template.

The witness testimony must be submitted only in the following permitted formats.

*.docx*

*.xlsx*

*.pptx*

*.pdf*

*.jpg*

*.png*

This must be uploaded to the apprentice's Dropbox folder by the date shown on the booking confirmation.

## **Question and answer session**

All apprentices will be given the opportunity to take part in a 45-minute question and answer session led by the end-point assessor. This will be scheduled to take place remotely prior to the professional discussion using our web conferencing system, Lifesize. This session will allow sufficient opportunity for the apprentice to demonstrate their knowledge, skills and behaviours and draw on the higher-grade learning outcomes. Apprentices are permitted to bring their witness testimony or other supporting documents to the question and answer session. As with all assessment activities, a valid form of photo identification must be shown to the assessor at the start of the question and answer session. Further guidance on how to use Lifesize and the technical requirements will be provided with each booking confirmation.

## **Case Study**

The scenario will be provided Highfield Assessment following Gateway where the apprentice is not able to experience real customer interaction. The case study scenario released to the apprentice will contain guidance to enable the apprentice to complete their case study within agreed timescales and as per the assessment plan. The Q&A session will still take place as per the assessment plan and will be scheduled prior to the professional discussion along with the Q&A for the witness testimony.

## Assessment criteria to be covered by witness testimony

Health & safety	
Ref	Assessment criteria (Pass)
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)
HS3	Explain to their customers the health and safety precautions taken to ensure safety
Materials of frames and lenses	
Ref	Assessment criteria (Pass)
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)
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	
Ref	Assessment criteria (Pass)
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)
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	
Ref	Assessment criteria (Pass)
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)
QG4	Clearly explaining the processes and procedures you are following to your customer when completing records and maintaining confidentiality and data protection
Screening checks	
Ref	Assessment criteria (Pass)
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	
Ref	Assessment criteria (Pass)
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
<b>Ref</b>	<b>Assessment criteria (Distinction)</b>
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

<b>Professionalism</b>	
<b>Ref</b>	<b>Assessment criteria (Pass)</b>
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
<b>Ref</b>	<b>Assessment criteria (Distinction)</b>
PR4	Customer expectations are exceeded consistently
<b>Safety orientated</b>	
<b>Ref</b>	<b>Assessment criteria (Pass)</b>
SO1	Follow safe working practices with all equipment used
SO2	Ensure customers, colleagues and self are safe
<b>Ref</b>	<b>Assessment criteria (Distinction)</b>
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