

## [Unique Reference Number]

### Contribute to the record keeping of the optical practice/store



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#### Overview

This standard covers how you will contribute to the effective administration and record keeping of the optical practice/store. It includes the making of appointments, operating recall systems, ensuring good record-keeping, the importance of confidentiality and processing NHS and other entitlements for customers. Users of this standard will need to ensure that practice reflects up to date information and policies.

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#### Performance criteria

#### Make appointments which suit the customer and the practice/store requirements

*You must be able to:*

- P1 identify the need for and the type of appointment
- P2 establish and confirm the customer's appointment requirements using available records and the appointment recording system
- P3 offer alternative arrangements, where appropriate, within your scope of responsibility and consult others where necessary
- P4 record the appointment accurately
- P5 ensure a suitable length of time is allocated for the appointment
- P6 provide a written record of the appointment to the customer
- P7 confirm the eligibility of the customer for allowances and provide accurate information on costs and fees
- P8 refer customer's entitlements to the relevant person or department
- P9 maintain confidentiality of information in accordance with statutory and practice/store requirements
- P10 maintain a courteous manner with the customer throughout

#### Operate a customer recall system

*You must be able to:*

- P11 update records with the relevant recall details, in accordance with practice/store and clinical requirements
- P12 ensure at the appropriate time, that records indicating the need for a type of recall are identified
- P13 initiate the recall system in accordance with practice/store and clinical requirements
- P14 ensure that the customer is notified when an appointment is due
- P15 carry out follow-up procedures for non-respondents
- P16 maintain security and confidentiality of information

#### Create and maintain records

*You must be able to:*

- P17 record information, according to record type, and store using accepted formats, systems and procedures
- P18 ensure that information recorded is accurate, complete and legible
- P19 ensure that records are created accurately
- P20 ensure that data is accurately transcribed and entered into the appropriate records
- P21 retrieve information and records promptly when required
- P22 maintain security and confidentiality of information

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### **Monitor and process NHS and other entitlements**

*You must be able to:*

- P23 check information sources relating to NHS entitlements
- P24 check information sources relating to promotion, supplier or other entitlements
- P25 pass relevant information to the customer accurately, clearly and in a manner which maintains goodwill
- P26 where necessary, identify and offer alternative options to the customer
- P27 consult with the relevant person where the situation is outside your own area of authority
- P28 confirm the customer's satisfaction with the arrangements
- P29 calculate redemption value of the NHS voucher and pass on for appropriate action
- P30 maintain security and confidentiality of information

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#### Knowledge and understanding

*You need to know and understand:*

#### Make appointments which suit the customer and the practice/store

- K1 the scope of your responsibilities, the responsibilities of others working within the practice/store
- K2 types of appointment and customer needs: eye examination, spectacle or contact lens collection, initial contact lens consultation, contact lens after-care, vision re-tests, screening
- K3 scheduling and prioritisation policies and balancing the practice/store and customer requirements
- K4 recording systems and format
- K5 staff availability – who's in/out
- K6 NHS entitlements, private appointments, fee structures
- K7 practice/store guidelines – what is provided: appointment card, marketing leaflets
- K8 time required for different types of appointments
- K9 what constitutes an ocular emergency
- K10 what is considered to be confidential – customer, clinical and business requirements/guidelines

#### Operate a customer recall system

*You need to know and understand:*

- K11 types of recall: eye examination, contact lens or spectacle collection, contact lens aftercare, screening
- K12 practice/store requirements for the different types of recall system: policies, procedures, instructions
- K13 clinical requirements
- K14 recall periods
- K15 the importance and reasons for recall systems
- K16 promotional requirements/opportunities
- K17 chasing procedure
- K18 what is considered to be confidential

#### Create and maintain records

*You need to know and understand:*

- K19 types of records and formats: supplier, customer, stock, NHS
- K20 purpose of different types of records and their importance
- K21 principles and methods of filing systems
- K22 information required for each type of record kept
- K23 information acquired from: customer, directories, written, telephone, third

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- K24 clinical and business requirements: policies, procedures, instructions
- K25 limitations of your authority and responsibilities
- K26 the relevant statutory requirements for record keeping of customer details and confidentiality
- K27 what is considered to be confidential

#### **Monitor and process NHS and other entitlements**

*You need to know and understand:*

- K28 NHS entitlements and vouchers
- K29 the forms and paperwork relating to NHS entitlements and vouchers
- K30 promotional and supplier offers
- K31 levels of authority: yours, line manager, supervisor, colleagues
- K32 the relevant statutory requirements for record keeping of customer details and confidentiality
- K33 practice/store requirements: policies, procedures, instructions
- K34 what is considered to be confidential

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### Additional Information

#### External links

This standard links with the following dimension within the NHS Knowledge and Skills Framework (October 2004):

Dimension: G5 Services and project management

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<b>Developed by</b>	Skills for Health
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<b>Version number</b>	1
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<b>Date approved</b>	June 2010
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<b>Validity</b>	Current
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<b>Status</b>	Original
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<b>Originating organisation</b>	Skills for Health
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<b>Original URN</b>	OPTR4
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<b>Relevant occupations</b>	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
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<b>Suite</b>	Optical Retailing
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<b>Key words</b>	record, keeping, optical, practice, store
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