



**SUPPORT
WORKFORCE**

Developing the Orthoptic Clinical Support Workforce:

Education, Experience, Roles and Responsibilities Guide



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Forewords

The British and Irish Orthoptic Society is delighted to partner with Health Education England (HEE) to develop this guidance for the orthoptic support workforce. Our support workforce, often known as Orthoptic Assistants, across the UK has a varied and wide skill set and these roles are emerging in the Republic of Ireland (ROI). They are the backbone to many orthoptic and ophthalmology paediatric and adult clinics but are frequently overlooked in the planning of services and pathway design, but their work is crucial for services to run. Their contributions to the smooth running of the clinics, the patient journey and to the overall experience of the patients and their carers cannot be valued highly enough. The orthoptic support workforce may face barriers to education and learning, understanding of their roles and responsibilities and to career progression. This important document gives orthoptic support workers in the UK and the ROI clear guidance around levels of practice, the educational and experience required along with a consistent approach to their roles and responsibilities. Investing in our support workforce can only positively support the transformation of orthoptic and, more widely, ophthalmology services. I would like to thank everyone who has supported and contributed to the development of this guidance and ultimately the growth and progression of our support workforce.



Veronica Greenwood

Chair

British and Irish Orthoptic Society

The orthoptic profession has been at the forefront of developing its clinical support workforce in the NHS. This workforce plays a critical role in orthoptic services performing a wide range of clinical and non-clinical tasks. Services would not be able to run without them. We know, though, that approaches to their recruitment, job design, education and career development can vary. This means that we do not always get the best from them, and they are not always clear about how they can progress their careers.

We are delighted that this guidance has been developed by BIOS with Health Education England through the work of a professionally led expert group. It aims to clarify levels of practice, education, and experience required on and after employment, titles and roles and responsibilities. We hope that it will be widely used by services to maximise the contribution of the orthoptic clinical support workforce to safe and effective patient care.



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A note on 'levels of practice'

The term 'levels of practice' refers to distinct clusters of responsibilities and underpinning knowledge and skills. This guide refers to three levels of practice for orthoptic clinical support workers. Each progress from the one before and represents a higher level of responsibility in terms, for example, of the tasks performed, or degree of autonomous working that may be undertaken or patients supported, and/or knowledge required. As such levels of practice are linked to *Agenda for Change* pay bands and job evaluation; however, it cannot be assumed that everyone working at, for example, the Senior Orthoptic Clinical Assistant level will be graded at Band 4. The guide points out that this band is *typically* what staff at this level should be graded at, but actual grading for individual employees will depend on the exact combination of responsibilities and demands of their role including elements outside of the scope of this guide such as the degree of physical and mental effort required in a job and its working conditions.



Part 1. Background and context

Introduction

Orthoptic and ophthalmic clinical support workers are employed in patient-facing roles and carry out a wide range of tasks assisting registered orthoptists and others. Tasks might include preparing clinical rooms, calibrating equipment, helping with vision testing, record keeping and supporting patient flow. These roles are not regulated by the *Health Care Professions Council* (HCPC) and work under the supervision of registered orthoptists. A scoping exercise, undertaken by [BIOS](#) in 2021, found that the majority of the orthoptic clinical support workforce are employed in *Agenda for Change* Bands 3 or 4. The same exercise also found a lack of standardisation and consistency in terms of: role titles, job design, task allocation and access to occupationally relevant education. This lack of consistency means that orthoptic support staff are not, for example, always able to maximise their contribution to care or be clear about how they might progress their careers.

Supported by HEE, this United Kingdom (U.K.) -wide *Education, Experience, Roles and Responsibilities Guide* has been produced to assist orthoptic¹ services, safely and effectively, build the capacity and capability of their clinical support workforce, to allow support staff to have a clear and consistent scope of practice, access to education and to support career progression.

At all levels support workers should be appropriately educated, trained, and supervised with appropriate delegation processes in place.

How this guide was developed and what it aims to achieve

In November 2020, BIOS organised an on-line event to explore issues that the orthoptic clinical support workforce might face across the U.K. This was followed-up with a survey to 173 service leads which was designed to gather more data on issues identified at the event, such as lack of access to occupationally relevant education. During 2022 and 2023 BIOS worked with an U.K.-wide expert group drawn from the profession, including support staff, that considered the issues that had

Box 1: NHS Support Worker National Policy: England, Wales, Northern Ireland, and Scotland

Recent years have seen a concerted effort across the U.K. to assist support staff and their employers increase capacity and capability. Efforts have been made to ensure that this Guide complements these, which include job evaluation. Further information can be found from the following organisations:

- [BIOS](#)
- [Department of Health](#) (Northern Ireland)
- [NHS England](#)
- [NHS Education for Scotland](#)
- [NHS Wales](#)

been previously identified and designed solutions to them. This guide is one of the outcomes of that work. It addresses the roles and responsibilities of support staff, titles and education requirement and has drawn on the expertise, experience, and insights of the expert group as well as a subsequent survey² and a consultation with the BIOS membership in 2023. This consultation showed strong support for and consensus on the detail of the guide.

Specifically, this guide addresses the following:

- **The need for standardised titles.** Titles matter to potential recruits, staff employed in roles, to their colleagues and service users. BIOS found that a large number of individual titles are used to describe the orthoptic clinical support workforce locally. This guide sets out recommended common titles at each relevant *Agenda for Change* pay band.
- **Clear levels of practice.** This guide summarises levels of practice and the broad range of responsibilities expected of staff at each level. It is hoped that this will assist local workforce planning, career progression and underpin safe and effective practice.

¹ This guidance will also be applicable to support staff working in ophthalmic services.

² A further survey has distributed in late 2022.

- **Consistent education and experience requirements.** There is presently no consistency between services in what they require in terms of education and prior experience when recruiting new support staff. This guide provides recommended minimum entry-requirements at each level of practice in terms of education and prior experience, to assist recruitment and support career progression. It also suggests the type of formal learning that support workers should access once employed.
- **Roles and responsibilities.** Examples of typical tasks performed and responsibilities at each level of practice are provided. This is intended to ensure:
 - Staff can safely and effectively work at the top of their scope of practice.
 - Effective delegation and supervision.
 - Consistent and appropriate task allocation.
 - Support development reviews and training needs analysis.
 - Job descriptions are up to date and reflect the work that staff perform.

The key differences between levels are also highlighted.

Box 2: Agenda for Change Band 2 Support Workers

Staff employed in *Agenda for Change* Band 2 roles play an important role in orthoptic services. These roles, though, should not be a *clinical* support role (i.e., patient facing), but rather focus on what might be described as ‘housekeeping’ tasks such as administrative ones, stock control and cleaning clinical areas, for example. This guide focuses on the roles and responsibilities of support staff employed in *Agenda for Change* Bands 3, 4 and 5.

The proposals in this guide are recommendations but it is hoped that they will be used by services locally so that the issues that support workers can face, can be addressed to provide rewarding careers, build capacity, and improve care for patients who may have a visual disorder related to eye development.



Part 2. How to use this guide

The project's Vision Statement includes the following aspiration:

We wish employment in the clinical support workforce to be seen as a career that is valued and valuable. Moreover, whether staff wish to pursue their careers in the clinical support workforce or progress onto registered grades, we wish to ensure they have rewarding careers and are clear how they can develop, accessing the support they need.

The support workforce is an integral part of the ... clinical team.

Now is the time to invest in their deployment, education, and development to maximise their contribution to care to help them make a difference.

This guide seeks to help services meet that aspiration. Working with support staff, the guide should be used to review existing or new Job Descriptions and Person Specifications to ensure that they fully reflect service needs and are up to date. Any substantial change to roles, such as the addition of new tasks, will require agreement with the staff concerned and, if appropriate, their trade union representatives in line with local policies and procedures.

This guide should be used in conjunction with other national guidance and resources (see Box 1).



Part 3. Titles

The focus of this guide is the orthoptic clinical support workforce and as such it addresses support roles employed at *Agenda for Change* Bands 3 and 4, but also roles graded at Band 5 (see Box 3). As described in Box 2 whilst services will employ roles at Band 2, these should not be undertaking clinical tasks and as such have not been included.

Box 3: *Agenda for Change* Band 5 support roles

If the requirements of a role meet the necessary [NHS job evaluation](#) criteria it is possible for support roles (i.e., those not regulated by professional bodies such as the HCPC) to be graded at Band 5 or above. Band 5 support roles do exist in orthoptic and other Allied Health Profession services, and this is reflected in this guide. The important points to note, however, is that **Band 5 orthoptic support workers do not perform higher level clinical tasks than Band 4s**. They are graded at a higher level due to **additional nonclinical tasks** such as team management or organising education. Further details are provided in Part 5 of this document.

The BIOS expert group reviewed the range of titles currently used by services to describe their support workforce and made recommendations to standardise. These are shown below, along with the *Agenda for Change* pay band that people would typically be graded at, (although actual grading depends on the exact tasks and responsibilities performed by post holders as assessed through the [NHS job evaluation](#) scheme). BIOS members were asked in the national consultation whether they agreed with the proposed titles and there was strong support for each.

Title	Typical grade
Orthoptic Clinical Assistant	Band 3
Senior Orthoptic Clinical Assistant	Band 4
Lead Orthoptic Clinical Assistant	Band 5

These titles are used throughout this document.



Part 4. Education and Experience Requirements

There are three levels of practice covered by this guide. The tables below summarise each level, and the education and experience requirements for each. These have been separated into one table for England, Northern Ireland and Wales, and a separate table for Scotland. At each level it is expected that newly appointed staff will also have demonstrated appropriate values, such as those of the [NHS Constitution](#). Once employed support staff will acquire knowledge of responsibilities for safeguarding children and vulnerable adults, so they are able to identify concerns and report these concerns appropriately in accordance with local policy.



Table 1. A summary of each level of practice, and the education and experience requirements for each within England, Northern Ireland and Wales.

Title	Entry education and experience requirements	Summary of role
Orthoptic Clinical Assistant (OCA)	<p>It is desirable that applicants for posts at this level should possess – at least a RQF level 2,¹ <u>and/or</u> have had previous experience dealing with people, for example in a customer care role or through volunteering, and/or work experience in a healthcare setting or through lived experience. Candidates should also be able to demonstrate digital skills. Digital skills include the ability to use devices and handle information, being able to use applications such as word processing and being safe and responsible online.</p> <p>Once employed OCAs will complete The Care Certificate and other relevant national programmes, such as the Welsh Formal Induction. They will also need to work towards an occupationally relevant RQF level 3.</p>	<p>Staff working at this level of practice will undertake fact-based judgements and, whilst supervised by registered staff and working to local policies and procedures, staff at this level can work on their own. They undertake clinical and technical activities that are relatively straightforward and routine.</p> <p>They will also carry out some administrative and other housekeeping tasks, contribute to service improvement and demonstrate their duties to other staff and students.</p>
Senior Orthoptic Clinical Assistant (SOCA)	<p>Applicants to SOCA posts should possess either one or more RQF level 3 qualifications. Previous experience dealing with people, for example in a customer care role or through volunteering, and/or experience in healthcare, such as through work experience, or other employment or lived experience is desirable. Candidates should also be able to demonstrate digital skills. Digital skills include the ability to use devices and handle information, being able to use applications such as word processing and being safe and responsible online.</p> <p>If not already acquired prior to employment, staff at this level should complete The Care Certificate and other national programmes</p>	<p>Staff working at this level of practice will have in-depth knowledge and understanding so that they are able to undertake more enhanced tasks than band 3 staff some of which will not be routine. Staff at this level independently manage their own workload undertaking tasks delegated to them by registered staff and working under supervision. They have an understanding of evidence-based practice and take responsibility for their actions. They will have an understanding and awareness of the meaning of test results and are able to escalate as appropriate</p> <p>They can contribute to service improvement and demonstrate their duties to other staff and students.</p>
Lead Orthoptic Clinical Assistant (LOCA)	<p>Whilst not working as a regulated professional staff at this level, they will possess knowledge at RQF level 4/5 plus extensive experience that may be equivalent to graduate level.</p>	<p>Staff at this level will perform the same clinical tasks as staff in SOCA roles. Additionally, they will undertake high level management responsibilities, organisational and administrative responsibilities such as team leading, assisting with recruitment or education and training responsibilities.</p>

¹ This ensures they have at least level 2 functional skills

Table 2. A summary of each level of practice, and the education and experience requirements for each within Scotland.

Title	Entry education and experience requirements	Summary of role
Orthoptic Clinical Assistant (OCA)	<p>On recruitment applicants at this level should normally have or be working towards a SCQF level 7 qualification in a health or social care related subject.</p> <p>Numeracy and literacy qualifications are required at this level of practice – normally at or working towards Maths / Numeracy at SCQF Level 5 as well as Literacy / English / Communication qualifications are required at SCQF Level 6 and/or have had previous experience dealing with people, for example in a customer care role or through volunteering, and/or work experience in a healthcare setting or through lived experience.</p> <p>Candidates should also be able to demonstrate digital skills. Digital skills include the ability to use devices and handle information, being able to use applications such as word processing and being safe and responsible online.</p> <p>On appointment staff should complete all necessary learning for their role including the <i>HCSW Code and Induction Standards and Code of Conduct</i>, as well as any formal qualifications necessary for their role. NHS Education for Scotland's 2023 Development and Education Framework for Levels 2-4 NMAHP Health-care Support Workers contains full details of available qualifications.</p>	<p>Staff working at this level of practice will undertake fact-based judgements and, whilst supervised by registered staff and working to local policies and procedures, staff at this level can work on their own. They undertake clinical and technical activities that are relatively straightforward and routine.</p> <p>They will also carry out some administrative and other housekeeping tasks, contribute to service improvement and demonstrate their duties to other staff and students.</p>

Table 2. A summary of each level of practice, and the education and experience requirements for each within Scotland. (continued)

Title	Entry education and experience requirements	Summary of role
Senior Orthoptic Clinical Assistant (SOCA)	<p>On recruitment newly appointed SOCAs should normally have or be working towards a SCQF Level 8 qualification in a health or social care related subject</p> <p>Numeracy and literacy qualifications are required at this level of practice – normally achieved Maths / Numeracy at SCQF Level 5 as well as Literacy / English / Communication qualifications are required at SCQF Level 6</p> <p>Previous experience dealing with people, for example in a customer care role or through volunteering, and/or experience in health-care, such as through work experience, or other employment or lived experience is desirable.</p> <p>Candidates should also be able to demonstrate digital skills. Digital skills include the ability to use devices and handle information, being able to use applications such as word processing and being safe and responsible online.</p> <p>On appointment staff should complete all necessary learning for their role including the <i>HCSW Code and Induction Standards and Code of Conduct</i>, as well as any formal qualifications necessary for their role. NHS Education for Scotland's 2023 Development and Education Framework for Levels 2-4 NMAHP Healthcare Support Workers contains full details of available qualifications.</p>	<p>Staff working at this level of practice will have in-depth knowledge and understanding so that they are able to undertake more enhanced tasks than band 3 staff some of which will not be routine. Staff at this level independently manage their own workload undertaking tasks delegated to them by registered staff and working under supervision. They have an understanding of evidence-based practice and take responsibility for their actions. They will have an understanding and awareness of the meaning of test results and are able to escalate as appropriate</p> <p>They can contribute to service improvement and demonstrate their duties to other staff and students.</p> <p>Patients SOCAs support may have more complex needs, experience barriers to understanding.</p>
Lead Orthoptic Clinical Assistant (LOCA)	<p>Whilst not working as a regulated professional staff at this level, they will possess knowledge at least at SQCF level 8 plus extensive experience that may be equivalent to graduate level.</p>	<p>Staff at this level will perform the same clinical tasks as staff in SOCA roles. Additionally, they will undertake high level management responsibilities, organisational and administrative responsibilities such as team leading, assisting with recruitment or education and training responsibilities.</p>

Progression into higher education

This Guide is designed to enable staff and those who manage and supervise them to develop themselves including through identifying new skills and responsibilities that could be acquired such as non-clinical management and administrative responsibilities. At the time of writing (2023) BIOS

is working, in England, to explore the potential in the future of new work-based apprenticeship routes to allow those orthoptic support staff who wish, and are able to, to progress their careers into pre-registration degrees to be able to do so. BIOS will keep members informed of developments.

Part 5. The orthoptic clinical support workforce roles and responsibilities

The following section contains information about the typical roles and responsibilities of staff employed in each level of practice). It is assumed, and indeed necessary, that support staff have been appropriately trained to perform tasks, that those tasks have been correctly delegated, and staff are properly supervised.

1. Orthoptic Clinical Assistant (OCA)

Role summary

Staff working at this level of practice will undertake fact-based judgements. Whilst supervised by registered staff and working to local policies and procedures, staff at this level can work on their own. OCAs undertake clinical and technical activities that are relatively straightforward and routine. They will also carry out some administrative and other housekeeping tasks, contribute to service improvement and demonstrate their duties to other staff and students. OCAs will undertake and perform appropriate tests for adults, children and young people who do not experience barriers to understanding. OCAs will know how to safely use appropriate clinical equipment. Whilst they will have a general understanding of the tests that they perform, OCAs will not be expected to interpret results. OCAs will typically be graded at *Agenda for Change* Band 3.

Experience, qualifications, and education

It is desirable that applicants for posts at this level should possess either (at least) a RQF level 2, or SCQF levels 6-7 qualification(s) and/ or have had previous experience dealing with people, for example in a customer care role or through volunteering, and/or work experience in a healthcare setting or through lived experience. Candidates should also be able to demonstrate digital skills. Digital skills include the ability to use devices and handle information, being able to use applications such as word processing and being safe and responsible online.

Once employed OCAs will complete the Care Certificate and other relevant national programmes, such as the Welsh Formal Induction.

They may also study an occupationally relevant RQF level 3 or SCQF level 7-8 qualification.

Safe and inclusive working

OCAs will work within organisational policies and procedures to ensure equality, diversity, and inclusion, as well as the safeguarding, protection, wellbeing, and safety of others and themselves. They understand the importance of infection control, duty of care and candour.

Typical roles and responsibilities

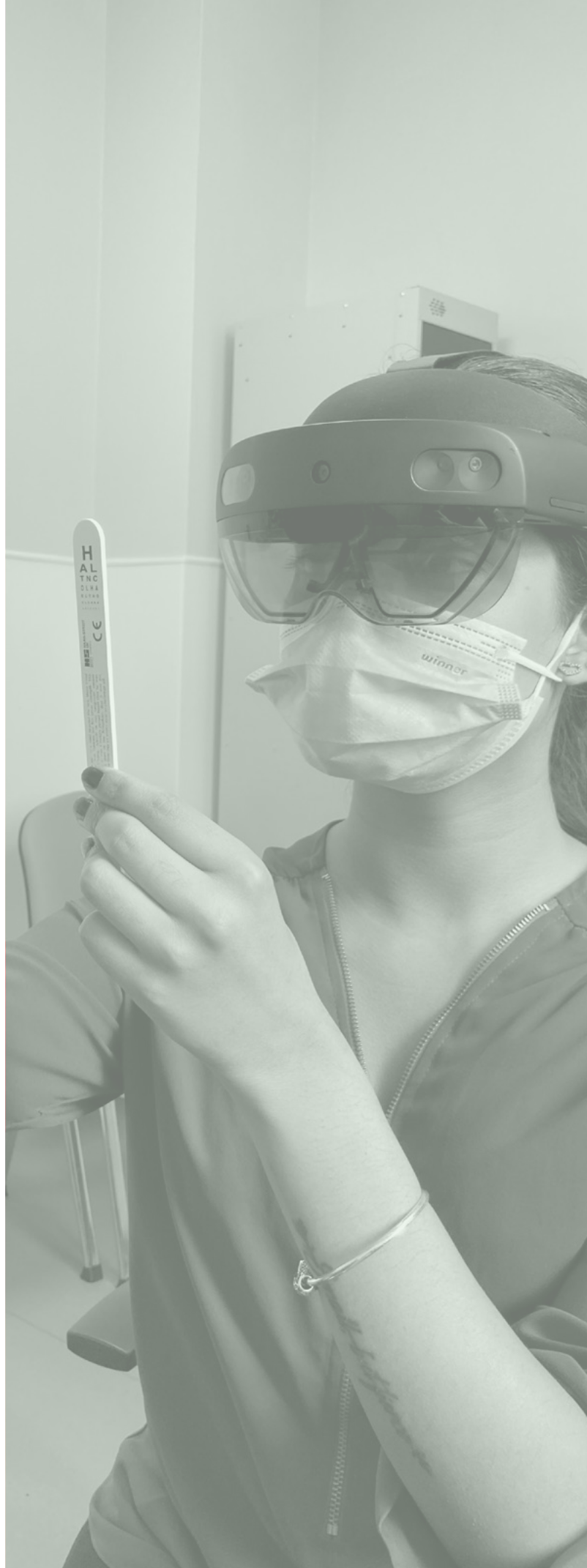
The following is a set of tasks that OCAs, with appropriate training and supervision, might perform. It is not expected that all OCAs will perform every task. Actual job design will depend on the needs of local services.

Non-clinical tasks

- Data management including, inputting, accessing, or amending patient and other data.
- Patient assistance such as providing reassurance, information, and guidance, assisting with referrals, appointments and reporting and correctly and safely position patients during tests.
- The set up and closing down of clinical areas including accurately calibrating equipment and the maintaining and cleaning of clinical and waiting room areas including cleaning of sensitive equipment.
- The education and training of others, including assisting in induction, training and development of others, including students, through demonstrating tasks and responsibilities within their scope of practice.
- Contributing to audits, service evaluations and quality improvement including making recommendations for and supporting change within the service.
- Carrying out routine research activities under the supervision of more experienced staff.
- Participating in the mentoring of less experienced support staff and students (including apprentices) in respect of tasks and responsibilities within scope of practice.

Clinical tasks

- Undertaking of visual acuity testing
- Performing Ocular Coherence Tomography
- Retinal scans and imaging
- Use of focimetry equipment
- Standard visual field assessment
- Undertaking computerised Corneal Pachymetry
- Instillation of eye drops
- Performing non-contact Intraocular Eye Pressure checks
- Undertaking height measurement, weights and blood pressure
- The making of prism bars
- Undertaking coloured overlay assessment
- Delivering rate of reading tests
- Neurological visual fields



2. Senior Orthoptic Clinical Assistant (SOCA)

Role summary

Staff working at this level of practice have in-depth knowledge and understanding so that they are able to undertake more enhanced tasks than Band 3 staff some of which will not be routine. Staff at this level independently manage their own workload undertaking tasks delegated to them by registered staff and working under supervision. They understand evidence-based practice and take responsibility for their actions. They will have an understanding and awareness of the meaning of test results and are able to escalate as appropriate. SOCAs can contribute to service improvement and demonstrate their duties to other staff and students, as well as directly supervising students. The patients SOCAs support may have more complex needs, experience barriers to understanding. SOCA posts will normally be graded at *Agenda for Change* Band 4.

Experience, qualifications, and education

Applicants to SOCA posts should possess either one or more RQF level 3 or SCQF levels 7-8 qualification(s). Previous experience dealing with people, for example in a customer care role or through volunteering, and/or experience in healthcare, such as through work experience, or other employment or lived experience is desirable. Candidates should also be able to demonstrate digital skills.

If not already acquired prior to employment, staff at this level should complete the Care Certificate and other national programmes. They may also study a RQF level 4/5 or SCQF 8 qualification such as a foundation degree.

Safe and inclusive working

SOCAs will work within organisational policies and procedures to ensure equality, diversity, and inclusion, as well as the safeguarding, protection, wellbeing, and safety of others and themselves. They understand the importance of infection control, duty of care and candour.

Communication skills

SOCAs may provide and receive complex and sensitive information, including information relating to patients. They judge the most appropriate method of communication, ensuring

information is provided in an accessible way. They actively listen and receive information, they give, and act on feedback. They understand the communication needs of others and adapt their communication style accordingly. **Typical roles and responsibilities**

SOCAs will perform some of the tasks undertaken by OCAs, such as optical coherence tomography testing, but, unlike OCAs, may also support patients who have barriers to understanding. SOCAs perform higher level nonclinical and clinical tasks as listed below. Actual tasks performed will be determined by local service need.

Non-clinical tasks

- The management of more junior staff and mentoring and supporting of less experienced staff and students on placements, including apprentices within their scope of practice.
- Participating in, contributing to, and occasionally leading of audits, service evaluation and quality improvement projects relevant to their own work.
- Applying of research governance, ethics, protocols and guidelines. SOCAs may undertake more complex research activities including data collection and analysis and disseminates research findings.
- Contributing to the learning of the organisation, colleagues and team, for example by giving and receiving constructive feedback and contributing to learning resources for others.

Clinical tasks

- Biometry
- Ultrasound Scans
- Goldman Tonometry
- Fluorescein and Indocyanine Green Angiography procedures
- A-scan for axial length
- Advanced multimodal fundal imaging
- Orthoptic-specific designated tasks

3. Lead Orthoptic Clinical Assistant (LOCA)

Role summary

Staff at this level will perform the same clinical tasks as staff in SOCA roles. Additionally, they will undertake management responsibilities, organisational and administrative responsibilities such as team leading, assisting with recruitment or education and training responsibilities.

Experience, qualifications, and education

Applicants to SOCA posts should possess either
Whilst not working as a regulated professional staff at this level will possess knowledge at RQF level 4 plus extensive experience that may be equivalent to graduate level.

Safe and inclusive working

LOCAs will work within organisational policies and procedures to ensure equality, diversity, and inclusion, as well as the safeguarding, protection, wellbeing, and safety of others and themselves. They understand the importance of infection control, duty of care and candour.

Communication skills

In addition to the communication skills required of SOCAs, LOCAs provide, receive, and manage sometimes complex and sensitive information, using a range of communication skills including persuasion and negotiation to gain co-operation.

Typical roles and responsibilities

Non-clinical tasks

LOCAs undertake higher level organisation, project, finance, and administrative tasks than other orthoptic support workers, including:

- Leading teams
- Responsibility for some financial resources, such as signing off timesheets or travel expenses
- Management and organisation of work processes such as rotas
- Assisting with recruitment processes
- Organisation of annual leave
- Undertaking and managing appraisals
- Change management and service improvement programmes
- Teaching and wider organisation and management of learning and development.

Clinical tasks

LOCAs who also perform clinical tasks will work to the same scope of practice as SOCAs as described in the previous section.

Appendix 1: An introduction to the U.K.'s education system: education frameworks and functional skills

Every formal qualification in the U.K. is placed on frameworks. The best way to understand this is to think of the framework as a bookcase and qualifications as books. Books that are of a similar reading level are placed together on the same shelf, with the books above them being a little more demanding. Rather than shelves, the frameworks have levels. All qualifications with the same degree of academic demand are placed at the same level, with qualifications at each subsequent level being progressively more demanding. At the top are doctoral degrees.

Keeping with the book analogy, whilst different books may require the same degree of reading ability, they may not be of the same length. It is the same for qualifications. Although different qualifications may require the same academic rigour, some will be longer in duration than others. Credits measure the time taken to complete a qualification. One credit equals 10 hours of study. A qualification at, say, level 3 that takes a hundred hours to complete will be worth 10 credits and so will a qualification of the same duration at level 4. Another qualification at level 3 that takes two hundred hours to complete will be worth 20 credits and so on.

Credits matter, particularly when applying for university degrees, where courses require a certain amount of learning in relevant subjects. UCAS tariff points are not the same as credits. Information is available that allows learners to translate their qualifications and credits to UCAS [points](#). Universities can also accept experiential learning – the knowledge, skills and behaviours learnt through the practice of work; however, whether and the extent that this happens is left to the discretion of individual institutions.

Northern Ireland, England, and Wales

Qualifications in Northern Ireland, England and Wales are placed on the **Regulated Qualifications Framework** (RQF) which comprises nine levels. The full RQF can be found [here](#). As already described each level reflects a discrete degree of understanding and

expertise. The levels most relevant to orthoptic support workers, along with examples of typical qualifications associated with each, are:

- Level 2 – GCSE (grades 9-4 (previously A*-C))
- Level 3 – A Levels
- Level 4 – Higher National Certificate
- Level 5 – Foundation Degree, Higher National Diploma
- Level 6 – Bachelor's degree

There are, in fact, many individual qualifications within each RQF level between 2 and 6.

RQF qualifications with a similar number of credits are grouped together and described in the same way:

1. **Awards** which are between 1-12 credits
2. **Certificates** which are between 13-36 credits
3. **Diplomas** which are 37 credits or above

So, for example, at level 2 it is possible to study for a National Certificate or Diploma, the difference being the number of credits awarded.

Functional skills

Functional skills, which are sometimes also called essential skills, refer to the numeracy and literacy requirements that adults need in their work, if they have not acquired these through secondary education. Functional skills also have levels, but these are different to the RQF ones:

- Entry Level 1, 2 or 3
- Level 1 (equivalent to GCSE 3-1)
- Level 2 (equivalent to GCSE 9-4)

Many clinical support worker posts in the NHS require level 2 functional skills either on appointment or acquired shortly afterward appointment.

Increasingly **digital skills** are also seen as an essential requirement of posts. Health Education England has produced a [Digital Literacy Capability Framework](#). In Wales there is an *Essential Skills Wales* qualification, that teaches people numeracy, literacy, and digital skills.

Scotland

Qualifications in Scotland are placed on the Scottish Credit and Qualifications Framework (SCQF) which has twelve levels. Full details can be found [here](#). Credits are used in Scotland in the same way as the rest of the U.K. The SCQF levels most relevant to support workers are:

- SCQF Level 7 (for example Higher National Certificates and Modern Apprenticeship)
- SCQF Level 8 (for example Higher National Diploma and Higher Apprenticeship)
- SCQF Level 9 (for example Degree)

There is an expectation that healthcare staff will acquire the relevant Literacy and Numeracy qualifications for their level of practice as set out in Table 2.



Appendix 2: Project Vision Statement

BIOS Support Workforce Development Project

A vision for our support workforce

Members of the orthoptic clinical support workforce are employed mainly in Agenda for Change bands 3 and 4¹. They work in service user facing roles that are not regulated by the Health Care Professions Council. They work under the supervision of registered orthoptists and have long played a key role in providing safe and effective care.

This important part of the workforce has not, however, always been developed consistently. For example, they can be utilised in different ways in different services. They do not always have clear career progression pathways or are able to access to occupationally relevant education, meaning, that the benefits of apprenticeships are not maximised. There are also many different and locally determined titles for roles, which can cause confusion for potential recruits, staff and service users.

There is now a pressing need if the NHS is to meet the unprecedented increase in demand for services now and in the coming years - to maximise the contribution of the support workforce to deliver safe and effective care.

The Support Workforce Development Project, led by BIOS is working with a United Kingdom-wide expert group to deliver the following:

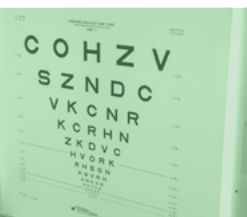
- Guidance on the roles and responsibilities and capabilities expected of the support workforce employed at each level of practice
- Recommended entry-level requirements for new recruits, and their learning and development needs once employed
- Recommended national job titles
- Information addressing frequently asked questions about this workforce
- Updated resources on BIOS webpages.

Our vision is for all orthoptic staff wherever they work to feel valued, integrated into teams, able to work fully to their potential; with access to lifelong learning including relevant formal qualifications.

We wish employment in the clinical support workforce to be seen as a career that is valued and valuable. Moreover, whether staff wish to pursue their careers in the clinical support workforce or progress onto registered grades we want to ensure they have rewarding careers and are clear how they can develop, accessing the support they need.

The support workforce is an integral part of the orthoptic clinical team.

Now is the time to invest in their deployment, education, and development to maximise their contribution to care to help them make a difference.



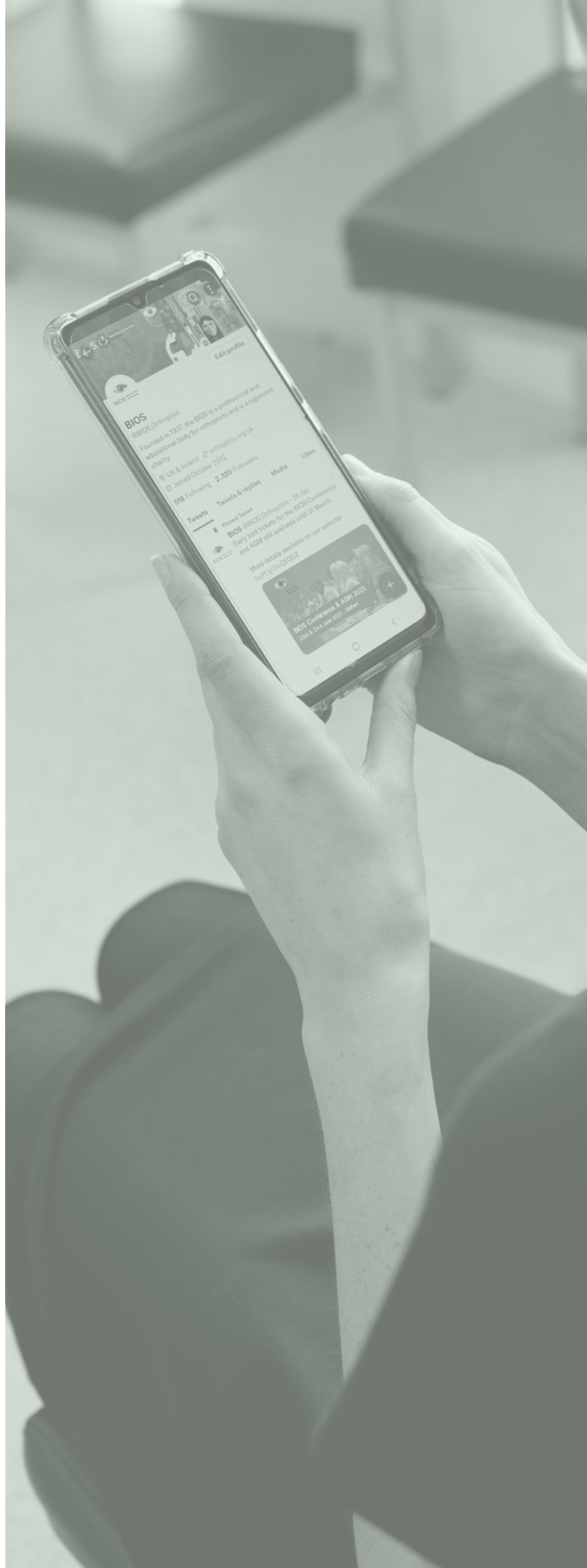
¹Band 2 roles will be employed in many orthoptic services but will not carry out direct service user facing clinical tasks

Further information

Further information about this project and further resource aimed at developing the support workforce are available from the BIOS [website](#).

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Developing the Orthoptic Clinical Support Workforce:

Education, Experience, Roles and Responsibilities Guide



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