



**European Council of Optometry and Optics**

# **European Qualification in Optics (EQO)**

## **Guidelines for the accreditation of qualifications which meet the standards of the European Qualification in Optics**

### **Part III: Guidance for Training Institutions, Candidates and Examiners**

- I. Guidance for Candidates & their Training Institutions**
- II. Guidance for Training Institutions and Examiners assessing the Portfolio**
- III. Blank Exemplar Portfolio**

## **Introduction**

The European Qualification in Optics is set at a minimum entry standard for dispensing optics in Europe and is equivalent to World Council of Optometry Category 1. To demonstrate you have achieved this standard you need to keep a record of all the practical experience you have gained on real patients, either as a student in supervised laboratories, workshops and clinics, during externships or in your professional practice following graduation. The Portfolio provides ECOO with the evidence to that you have the client experience and practical skills to offer optical care at the level of the EQO.

This evidence is presented in the form of a Portfolio and the European Qualification in Optics can only be awarded to candidates who successfully complete this.

The requirements for the Portfolio are set out in the Exemplar Portfolio at the end of this document. To complete, you should select 50 ophthalmic dispensing cases and 50 glazing experiences conducted over the last two years (maximum three) that demonstrate your knowledge and skills.

This document provides guidance for candidates and the institutions where they train. It is possible that the Portfolio will be completed during the time spent at the Training institution (pre-qualification), in which case Training Institutions need to guide their students as to what is required to successfully meet the Portfolio requirements of the European Qualification in Optics. It is also possible that all or some of the Portfolio will be completed after qualification. In the latter cases, the Training institution will provide a framework for completion of this.

## **The Purpose of the Portfolio**

The Portfolio provides ECOO with the evidence to that you have the experience and practical skills at the level of the European Qualification in Optics. This Guidance is for candidates and the training institutions where they train, and for the Examiners. The purpose of this Guidance is to suggest what level of detail might be expected in the detailed cases and in particular how to present these data in the detailed cases.

Guidance is given below on each of the three sections of the Portfolio to help the Training Institution advise candidates when completing up their portfolio, and to help Candidates who have left their Training Institution. The guidance is also for Examiners who assess portfolios. It is hoped that this guidance will ensure consistency in the presentation of the patient experience data by Candidates (guided by the staff of fully accredited institutions, in the case of Candidates who are still students) and of the evaluation of these data by examiners from ECOO.

# **I. Guidance for Candidates & their Training Institutions**

## **Guidance for Completion of each Section of the Portfolio**

### **Section 1. Candidate details**

In this section the Candidate provides his/her name, student identification number and address and contact details.

The remainder of this section lists the educational route the Candidate has followed to reach the stage of submitting the Portfolio and lists what supporting evidence is required.

Candidates submitting the Portfolio will have successfully completed an ECOO-accredited course and the ECOO accreditation will cover the period when the student trained there. It is possible the course they took was only partially accredited by ECOO and a follow-up course (or additional ECOO-accredited learning) was undertaken at another Institution, or at the same Institution at a later time, in order to ensure that in sum, their training leads to full ECOO accreditation of their programme of learning. In both of these scenarios, there are two possibilities:

- (i) Candidates complete their Portfolio whilst registered as a student in a Training Institution which has been approved by ECOO or
- (ii) Candidates that are unable to gain sufficient client/patient experience within their period of training for them to fulfil the Portfolio requirements. In this scenario, the Candidate completes a Portfolio after graduation containing any suitable patient experience gained within the training programme and further patient experience gained as a qualified optometrist. The candidate then submits this to the training institution and this is assessed by the training institution based on the criteria of the European Qualification in Optics Portfolio requirements.

For both (i) & (ii), the following information is required: The name of the training programme(s) attended, the name and address of the training institution, the starting and finishing dates of study at the institution. The name and address of the practice(s) where the candidate gained clinical experience, who their supervisor/manager was, and start and finish dates of placements. A certified copy of the national (professional) diploma and/or university diploma.

### **Section 2: Evidence of Practical Experience**

The objective of this section is to broadly define the **quantity** of the Candidate's practical experience based on the approximate numbers of clients dispensed and the number of complete spectacle glazings done by the candidate over the last two (maximum three) years.

**Information required:**

- Years/months in practice as an optician.
- Copies of qualification certificates.
- The approximate numbers of ophthalmic dispensings and workshop glazings done by the candidate over the last two years.
- The names and addresses of the work places where this experience was gained. See the proforma in III. Blank Exemplar Portfolio in this document. Use one page for each workplace.

**Section 3: Evidence of scope of practice.**

The objective of this section is to demonstrate the **quality** of the candidate's work in dispensing spectacles and glazing spectacles.

**Information required for Spectacle Dispensing:**

Detailed case records of **FIFTY** ophthalmic dispensings carried out at the EQO standard and covering the range of prescriptions, lenses and spectacle use listed in the table below. There is a standard format for the detailed cases (See III. Blank Exemplar Portfolio).

The 50 cases should include at least **TWO** examples of each of the following:

<b>Range of Spectacle Dispensings (50)</b>	
Paediatric dispensing (child under 12 years)	Progressives and Trifocals
Rx from $\pm 5.00D$ to $\pm 9.75D$	Occupational dispensing
Rx $> \pm 9.75D$	Personal eye protection
Rx for gross anisometropia ( $>5.00D$ )	Sports eyewear dispensing
Prescribed tint	Low Vision
Bifocals	Referral involvement for pathology???

The clients should not be identified by name but by a unique reference number that will permit the original record card to be retrieved from the practice if it is requested by ECOO. The management must be evidence-based and as far as is possible the evidence should be included in the record.

### **Management Plan:**

Each dispensing should include a plan that you make on how to approach or solve the client's problems. The plan should contain pertinent information on

- how should the refractive correction be dispensed? Spectacles or contact lenses
- specification of spectacles lenses and frame.
- instructions for wear.

In each of these case records the candidate should demonstrate:

- understanding of the client's problems,
- how he/she decided which frames and lenses are appropriate,
- how he/she interpreted the prescription,
- how he/she came to a final decision on the frame and lenses,
- the advice given to clients on the use of the spectacles.

### **Reflection**

Provide a brief discussion of your case. What problems did you encounter? Describe the thinking process of how you came up with the dispensing options. Describe how you came to the final decision. If appropriate, state why and when you want to see the client again for a follow-up.

Describe changes you need to make to improve the frame fitting. Include details of any follow up visits.

In addition to the basic data the Case studies should include reflection on the Case to demonstrate an evidence-based approach to management.

### **Section 4: Evidence of glazing experience.**

The objective of this section is for the candidate to present evidence of experience in "*Cut, edge and fit*" of both glass and plastic lenses to a range of different powers and to spectacle frames of different designs and materials.

Range of Spectacle Glazings (50)	
Lenses	Frames
Rx Plano to $\pm 5.00D$	To plastic full rimmed frame
Rx from $\pm 5.00D$ to $\pm 9.75D$	To metal full rimmed frame
Rx $> \pm 10.00D$	To nylon supras
Bifocals and trifocals	To rimless mounts
Progressive power	

The evidence can be presented as a list of 50 glazing experiences classified under the various headings. See III. Blank Exemplar Portfolio for a template.

### **Further Guidance for Candidates who are not familiar with Detailed Case Studies:**

The following list of headings and content might be useful when deciding on how to present a particular case. These are just suggestions for you to consider and obviously not all are relevant to all clients.

- History and Symptoms (Anamnesis):
- Age, gender, ethnical background (pertinent for different facial features)
- Chief complaint
- Refractive history and current spectacles, if any.
- Occupation and recreational activities
- Any medical history that might affect the choice of lenses and/or frames

Based on the obtained information provided by the client during history taking, you should be able to provide options for the frames and lenses which would be suitable for the client.

- how they decide which frames and lenses are appropriate,
- how they interpret the prescription,
- how they came to a final decision on the frame and lenses,
- the advice given to clients on the use of the spectacles

## II. Guidance for Training Institutions and Examiners assessing the Portfolio

This advice is additional to and should be read together with I: Guidance for Candidates & their Training Institutions.

### Guidance on assessment of the 50 detailed Spectacle Dispensing cases

The client experience presented should cover all the range of spectacle dispensings listed in I: Guidance for Candidates & their Training Institutions. If there is doubt about the validity of these data a request for a specified 10% sample of practice records can be made.

The assessment is based on the completeness and coherence of the record.

#### Points to consider:

- Has the candidate gained sufficient information from the client?
- Have all likely possibilities been explored?
- Have inconsistencies in the findings been noted and discussed?
- Is there an adequate description of the occupational and recreational needs of the client?
- Do the dispensed spectacles meet the needs of the client?

#### Assessment Criteria:

- Overall are you convinced that the Candidate understood the problems of the client, performed an adequate investigation and provided a safe service and satisfactory optical appliance to the client?
- Is the record convincing as a dispensing performed by a reasonably experienced, 1-2 years, and competent optician working independently with clients at the level of the EQO?
- **NOTE:** The Candidate's investigation and management does not have to be the same as how the Examiner would have managed the client!

### Guidance on the assessment of the 50 workshop glazing experiences.

The workshop experience presented should cover all the range of glazing listed in I: Guidance for Candidates & their Training Institutions.

### III. Blank Exemplar Portfolio



**The European Council of Optometry and Optics  
The European Qualification in Optics**

## **Portfolio of Practical Experience: BLANK EXAMPLAR PORTFOLIO**

**Candidate's Name**

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**Date of Submission**

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### **The Portfolio of Practical Experience**

The Portfolio is the record of the experience gained by candidates for the European Qualification in Optics either during their undergraduate education and training or as a postgraduate or a combination of the two. The purpose of

the Portfolio is to present evidence of the quantity, diversity and quality of care that the candidate provides for clients.

### **Completing the Portfolio**

Before starting to complete the Portfolio you should carefully read the accompanying document **“Guidance for Training Institutions, Candidates and Examiners”**. This sets out the experience required from the last two (maximum three) years of your training and the number of detailed client records that you are to submit. It also explains the content and format required for these cases.

### **National Data Protection and Privacy Legislation**

In order to comply with data protection and confidentiality laws you should ensure that you have the clients’ consent to use the records. Also observe the privacy regulations in your country of experience. The client should NOT be identified by name or address but by a unique reference number that will permit the original record to be retrieved if requested by the Examiner.

### **Further Information**

For accreditation purposes of the programme and/or portfolio, the portfolio and cases may be reviewed by members of the accreditation panel of the European Qualification in Optics.

## Section 1: Candidate's Details

<b>Name</b>	
<b>Address</b>	
<b>e-mail</b>	
<b>Phone number</b>	

## Training programme

<b>Name of accredited programme</b>	
<b>Name of training institution</b>	
<b>Address of training institution</b>	
<b>Period of study</b>	From _____ to _____
<b>Qualification awarded</b>	

## Section 2: Evidence of the extent of your Practical Experience

<b>Number of years/months in practice as a qualified optician</b>	_____ Years	_____ Months
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**Evidence available to support this:**

<b>*National certificate</b>	<b>Yes / No</b> (delete as appropriate)
<b>*Professional Diploma</b>	<b>Yes / No</b> (delete as appropriate)
<b>*A certified copy of these certificates should be sent with the application</b>	

**Number of clients dispensed and complete spectacles glazed during the last two (maximum three) years of career**

<b>Ophthalmic dispensings</b>	<b>Number:</b> _____	
<b>Complete spectacles glazings</b>	<b>Number:</b> _____	
<b>Evidence Available from:</b>	<b>Yes</b>	<b>No</b>
<b>Practice/shop records</b>		
<b>Training institution records</b>		
<b>Personal logbook</b>		

### Section 3: Evidence of Scope of Practice

50 detailed dispensing cases and a list of 50 glazing experiences

#### Ophthalmic Dispensings: 50 detailed cases

Please attach copies of **Fifty detailed cases** that demonstrate ophthalmic dispensing at the EQO standard and covering a wide range of clients. Candidates should present these cases comprehensively as they think most appropriate and the detailed cases may be all to the same format or different for each patient. The 50 clients should **not** be identified by name but by a unique reference number that will permit the original record to be retrieved if necessary. Pertinent information to the clinical case like age and sex, however, should be provided.

The 50 cases should include at least **TWO** examples of each of the following:

Range of Spectacle Dispensings (50)	
Paediatric dispensing (child under 12 years)	Progressives and Trifocals
Rx from $\pm 5.00D$ to $\pm 9.75D$	Occupational dispensing
Rx $> \pm 9.75D$	Personal eye protection
Rx for gross anisometropia ( $>5.00D$ )	Sports eyewear dispensing
Prescribed tint	Low Vision
Bifocals	Suggests visiting a Medical Practitioner

On the following page there is a suggested template candidates may use to present each of their 50 case studies.

## Example Template for detailed Ophthalmic Dispensing cases (50)

<p><b>European Qualification in Optics</b>  <b>Portfolio of Practical Experience: Case Record No: _____</b></p> <p><b>Candidate Name: _____ Client Ref No: _____</b></p>												
<b>Prescription to be dispensed:</b>												
<b>Right</b>	Sph	Cyl	Axis	Prism	Base	<b>Left</b>	Sph	Cyl	Axis	Prism	Base	
	<b>Addition:</b>						<b>Addition:</b>					
<b>Additional prescription information:</b>												
<b>Client details:</b>												
<b>Proposed Management:</b>												
<b>Frame details:</b>												
<b>Lens and centration details:</b>												
<b>Fitting and adjustments:</b>												
<b>Reflection on the Case:</b>												

**Spectacle Glazings: a classified list 50 “cut, edge and fit” glazings.**

A list of fifty spectacle glazings classified as indicated in the table below.

<b>Range of Spectacle Glazings (50)</b>	
<b>Lenses</b>	<b>Frames</b>
Rx Plano to $\pm 5.00D$	To plastic full rimmed frame
Rx from $\pm 5.00D$ to $\pm 9.75D$	To metal full rimmed frame
Rx $> \pm 10.00D$	To nylon supras
Bifocals and trifocals	To rimless mounts
Progressive power	

On the following page there is a suggested template indicating how the list of 50 glazing experiences can be presented under these range of spectacle glazings.

In addition, you should include details of the practices where each of the **50 Dispensings and the 50 Glazings** experience was gained, together with the name and contact details of any professional colleagues who can provide references confirming the dates during which the experience was gained together, if possible, with references confirming your scope of practice.







## European Qualification in Optics

### **Section 4. Certificate to be completed by the candidate:**

I CERTIFY that the information in this Portfolio is correct and that the practical experience claimed can be substantiated by client records and that these records can be made available if required by the Board of Examiners of the European Qualification in Optics.

Signed \_\_\_\_\_

Date \_\_\_\_\_

PRINT NAME \_\_\_\_\_

## **Certificate(s) to be completed by eye care professionals**

I CERTIFY that \_\_\_\_\_ was a student/colleague/employee from: \_\_\_\_\_ to \_\_\_\_\_ and has undertaken the practical experience listed in the Portfolio from \_\_\_\_\_ to \_\_\_\_\_ and that to the best of my knowledge has worked to the standards required by the European Qualification in Optics.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Full Name: \_\_\_\_\_

Qualification: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Telephone: \_\_\_\_\_

e-mail address: \_\_\_\_\_

A separate certificate should be completed for each period of experience at a training institution, a shop or a workshop.

**End of Portfolio**