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# REFRACTION ACTION PLAN SUMMARY

## Revised 11 September 2025

## INTRODUCTION

1. The short-life Refraction Certificate (RC) Working Group met three times and produced an Initial Report (**Appendix 1**) as to the way forward for refraction and the Action Plan as requested by the GMC. The three summary points in the Initial Report are:

* The RC is currently required for all wishing to complete the OST training programme and is a highly regarded and robust RCOphth examination.
* There is obvious potential to move to a WBA-based or hybrid approach but only if supported by the robust evidence base of a pilot. Until that time the RC should continue to be completed by the end of ST3.
* There should be investigation of a future differential approach to the assessment to reflect SIAs particularly where the skills of refraction are not likely to be used in consultant practice.

1. The Action Plan outlines how the RCOphth demonstrates that it meets the GMC standards for curricula and assessment with respect to the RC. It was shared with the Ophthalmologists in Training Group (OTG) and Examinations Committee for feedback and has been approved by the Curriculum Sub-Committee. The main focus of the Action Plan, as outlined in the RCOphth letter to the GMC of 31 January 2024, is on carrying out a pilot, the outcomes of which will enable the RCOphth to make clear decisions about the way forward for refraction. The timescale for completion of the pilot is July 2026, following which a submission may be made to the GMC.

## 1. PILOT – WBA ASSESSMENT OF REFRACTION

#### 1.1Aims

The aims of the pilot are to (a) assess whether a workplace-based assessment, combined with a logbook, can meet the same standards as the RC for assessment of refraction skills and (b) assess whether this approach is deliverable across the UK. The pilot will also aim to provide evidence for the options for the RC itself.

1.2Choice of WBA

Due to the multi-dimensional nature of refraction (involving knowledge, practical skills, communication and ability to interpret results), the Curriculum Sub-Committee and Examinations Committee agreed that the Entrustable Professional Activity (EPA) tool was the most appropriate assessment to pilot. The EPA has the advantage of being validated by the GMC and is currently being used for Level 1, Level 2 and all twelve Special Interest Areas (SIAs) in Level 3 and 4, demonstrating that it is perfectly possible to develop an EPA for refraction. Residents and trainers will also be familiar with the concept of the EPA, which should reduce the challenges for those taking part in the pilot. The pilot EPA is pitched at Level 2, matching the descriptors for refraction that are in the Level 1 and 2 syllabi and the current waypoint of end ST3. This will also enable comparison of the RC results between pilot cohorts. Pilot participants will complete the EPA on the ePortfolio.

1.3 Logbook

The logbook is an essential component for sign-off of the EPA. It replicates the requirements of the RC, i.e. the different types of refraction and different refractive errors. Indicative numbers for each type of refraction will be given so as to inform ES and NCS as to what is expected. Current evidence suggests that most candidates practice at least 50 refractions before taking the RC. Pilot participants will use a stand-alone spreadsheet rather than the Eye Logbook.

#### 1.4 Anticipated outcomes

The pilot will answer the question as to whether the WBA and logbook approach to refraction are deliverable across the UK and if they enable curriculum competencies to be achieved. It should also provide the basis for an understanding of the options for retaining the RC in a different way, e.g.

* All residents could have **the choice** between the WBA approach and the RC – this may be particularly relevant in areas of the UK where access to optometrists to sign off assessments is an issue. Residents who prefer taking a formal examination could also choose the RC rather than have another EPA to do.
* Some SIAs to recommend the RC as **an option** – it may be possible to recommend the RC for Level 4 PO and/or CS, as these SIAs have a greater demand for refraction skills.
* Some SIAs to specify the RC as a **mandatory requirement** – the same SIAs could require that the RC is passed before entry to Level 4. However, this could create what in effect would be new subspecialties and could also act as a barrier to those interested in these SIAs.
* Overseas candidates and international graduates – there should be no change to the RC for these groups if the RC is maintained as an option in the Programme of Assessment.

#### 1.5 Governance

The pilot will be overseen by the Refraction Pilot Group (RPG) consisting of the Examinations Committee Chair, Training Committee Chair, Refraction Certificate Lead, Curriculum Sub-Committee Chair, resident doctor rep from the OTG and staff from the relevant RCOphth departments. There will be a Project Manager who will report regularly to the RPG, and who will be responsible for all aspects of planning and support for the pilot. The RPG will report to the Examinations Committee and Training Committee. Meetings of the RPG have been arranged for 2 July, 6 August, 10 September, 15 October, 15 November and 10 December 2025. Further meetings will be arranged in 2026.

1.6 Pilot plan

The pilot plan is divided into three stages:

* Preparation
* Pilot
* Outcomes

| **PREPARATION**  **To develop the EPA and logbook for pilot** | | |
| --- | --- | --- |
| **Task** | **Comments** | **Timescale** |
| Devise new EPA in Refraction and logbook | Based on Level 1 and 2 syllabi and at the same level as the current RC (Level 2) | Mid-August 2025 |
| Agree format for EPA and logbook | Pilot form agreed to be on eP and will need to factor in sufficient time for 14Fish. Logbook spreadsheet to be published as soon as it has been approved. | 22 September 2025 |
| Test pilot plan, sample EPA (Word) and logbook content with stakeholders | Pilot Plan was approved at the Curriculum Sub-Committee meeting on 20 June. Final version to be presented to the OTG meeting on 4 July, Exams Committee on 10 July and the Training Committee meeting on 19 September. The Lead Dean has also been informed. | 19 September 2025 |
| Make any changes to EPA and logbook and approve to pilot | To be approved by Chair Training and Chair Examinations Committees | 22 September 2025 |
| Send final EPA to EMIS (ePortfolio) |  | 22 September 2025 |

| **MAIN PILOT**  **To develop and consult on a detailed pilot plan**  **To carry out the pilot as per the pilot plan** | | |
| --- | --- | --- |
| **Task** | **Comments** | **Timescale** |
| Make a comprehensive plan for piloting the chosen WBA and logbook | The pilot plan will be shared with GMC as part of the Action Plan and contain the elements below.   1. Pilot governance 2. Comms to TPDs, OTG 3. Incentive to take part 4. Final EPA 5. Final Logbook 6. Pilot cohort definition 7. Guidance and instructions 8. Pilot runs November 2025-May 2026 | June 2024-May 2026 |
| Pilot cohort to begin | Pilot cohort must complete the EPA prior to sitting the RC | October/November 2026 |
| Pilot cohort to sit RC | If candidates manage to complete the EPA but fail the RC there will be a concern | May 2026 |
| Collect feedback from all participants | The survey will include questions as to the possibilities for maintaining the RC as an option either for all residents or for certain SIAs. | May 2026 |

| **OUTCOMES**  **To carry out analyses of results and gather feedback**  **To write a report with recommendations** | | |
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| **Task** | **Comments/questions** | **Timescale** |
| Assess whether the EPA meets the required standard | Psychometric analysis of RC results for pilot cohort -v- other candidates | June 2026 |
| Assess the deliverability of the EPA | Analysis of the feedback from all participants | July 2026 |
| Assess participants appetite for the RC versus the WBA and on whether the RC could be an option for some SIAs | While deliverability and equivalence of standard are the two main objectives, we also have to consider what the possibilities are for maintaining the RC as an option, either for all residents or for certain SIAs | July 2026 |
| Compile a report on Pilot | This report can be compiled fairly quickly based on the above. | July 2026 |