Training Committee and Examinations Committee

REFRACTION PILOT GUIDANCE

Refraction Pilot Group

***Introduction***

1. Thank you very much for agreeing to take part in the Refraction Pilot (RP). This guidance document is for residents, SAS doctors and supervisors/assessors about the RP requirements, which are for residents to complete: (a) a new EPA in Refraction, (b) a Logbook (c) a pilot survey – and (d) sit the Refraction Certificate in May 2026. The RP will run from 1 November 2025 to 31 May 2026. The outcomes of the Pilot will determine what changes if any are needed to the Programme of Assessment and will be reported to the GMC.
2. The aims of the RP are to (a) assess whether a workplace-based assessment, combined with a logbook, can meet the same standards as the Refraction Certificate 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 going forward.
3. The RP is overseen by the Refraction Pilot Group (RPG) on behalf of the Training and Examinations Committees. The RPG consists of the Chairs of the Examination and Training Committees, Refraction Senior Lead, two OTG reps and appropriate College staff. The RP EPA and logbook was developed by the Refraction Senior Lead, Mr Luke Clifford, were approved to pilot by the Curriculum Sub-Committee and shared with the GMC.

***The EPA***

1. The general purpose of the EPA is to assess the level that a resident or SAS doctor can be entrusted with independent practice. EPAs allow assessors to make and record a decision about the degree of independence a doctor can safely work with. In our curriculum the degree of independence is described in terms of entrustment, using the terms
* Observing
* Needs Direct Supervision
* Needs Indirect Supervision
* Competent to this Level
1. The Curriculum Sub-Committee and Examinations Committee agreed that the EPA tool was the most appropriate assessment for refraction, as it requires simultaneous proficiency in multiple competencies. Residents and trainers will be familiar with the concept of the EPA, which should reduce the challenges for those taking part in the pilot.
2. For the purposes of the RP, 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. Residents will be required to be ‘competent’ at Level 2.
3. The RP EPA will be available on the ePortfolio in exactly the same way as the other EPAs. It will be clearly labelled “RP EPA Pilot”. The [Word template for the EPA](https://www.rcophth.ac.uk/wp-content/uploads/2025/09/EPA-Refraction-FINAL.docx) is also available on the website to download for those who do not have access to the ePortfolio.
4. Residents taking part in the RP must inform their NCS. TPDs have already been notified.
5. **Residents should please** **note that the completed RP EPA will not count towards the ESR, nor the ARCP and that they will still need to complete the relevant Level 1 or 2 EPA as well.**

***How to complete the EPA***

1. The EPA is very similar to the other EPAs and should be completed according to the [general guidance on EPAs.](https://curriculum2024.rcophth.ac.uk/curriculum-handbook/new-assessment-tools/#section-1) It should be reviewed and signed off by the NCS. The mandatory requirements are described below.
2. Mandatory requirements in Outpatients
* Two workplace-based assessments – DOPS Focimetry (can be either manual or automated) and CRSRet Cycloplegic refraction (already a requirement in the current Level 2 EPA).
* Evidence of five competencies
	+ non-cycloplegic retinoscopy of myope
	+ non-cycloplegic retinoscopy of hyperope
	+ full subjective refraction – sphere refinement
	+ full subjective refraction – cylinder refinement
	+ full subjective refraction – binocular balance techniques.
* You can evidence these five competencies with DOPS, OSATS, direct observation, observation by another member of the team or other, and get them signed off by an individual with appropriate expertise in refraction, e.g. optometrist, consultant paediatric ophthalmologist or cataract surgeon
1. Other mandatory requirements
* Review of logbook (at least 50 refractions with a minimum of 10 of each type (cycloplegic, non-cycloplegic, subjective refraction of sphere and cylinder))
* Multi-Assessor Report
* The normal requirements for longitudinal observation and CbDs have been removed.
1. The approved Refraction EPA should be uploaded to the ePortfolio by Friday 8 May 2026. **This must be done prior to sitting the Refraction Certificate.** Those who do not have access to the ePortfolio should email the completed Word EPA to RefractionPilot@RCOphth.ac.uk by the same deadline of Friday 8 May 2026.

[***The RCOphth Refraction Logbook***](https://www.rcophth.ac.uk/wp-content/uploads/2025/08/RCOphth-Refraction-Logbook-FINAL.xlsx)

1. 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 are 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.
2. Patients should be informed about populating the Logbook prior to consultation.
3. Care should be taken as to where the Logbook is stored on individual systems prior to sending to RCOphth, and access to it should be controlled. Once it has been emailed to RCOphth, it should be deleted after an appropriate time.
4. The Logbook has been developed specifically to enable residents to record details of the refractions they undertake for this pilot and is an essential part of the RP EPA. The Logbook can be [downloaded from the RCOphth website](https://www.rcophth.ac.uk/wp-content/uploads/2025/08/RCOphth-Refraction-Logbook-FINAL.xlsx) and once completed should be emailed to RefractionPilot@RCOphth.ac.uk prior to sitting the Refraction Certificate **by Friday 8 May 2026.**

***Guidance for NCS***

1. NCS should look at all the evidence provided which should include:
* Mandatory WBAs and make sure these have been signed off as competent.
* Logbook – this should show at least 50 refractions (indicative number). Each eye refracted MAY count as one refraction. The refractions MUST cover cycloplegic refraction (at least 10), non-cycloplegic refraction (at least 10) and full subjective refraction (at least 10).
1. Non-cycloplegic refractions MUST include a mixture of both myopic and hypermetropic patients.
2. Subjective refraction may be done in segments so that a trainee may record that they have just performed a subjective refinement of the sphere in one eye. Separate segments can be added together to create one full subjective refinement - however there must be at least 10 full subjective refractions completed (sphere refinement, cylinder refinement and binocular balance).
3. It is not expected that every logbook entry will be supervised but there should be evidence that a number of the refractions have been observed or formally assessed and this MUST include at least one cycloplegic refraction (two eyes), one non-cycloplegic myope (two eyes), non-cycloplegic hypermetrope (two eyes), one full subjective refraction (two eyes).
4. Multi-Assessor Report – this should be completed by all clinicians who have trained/observed/assessed the trainee in the practice of refraction. If the NCS is the only person who has been involved with the training/observation/assessing then a MAR will not be necessary.

***The Refraction Certificate***

1. Residents that have completed the EPA and Logbook must sit the May 2026 Refraction Certificate examination. The result will be formally recorded and will be part of the doctor’s training record in the usual fashion.

***The Survey***

1. All taking part in the RP must complete a survey after the Refraction Certificate examination has taken place. There will be one for residents and one for assessors and supervisors. It is essential that all feedback is captured so that a comprehensive report can be written and recommendations made about the future of refraction in the programme of assessment. The survey will ask questions about all aspects of the RP.
2. On completion of the EPA, Logbook, Refraction Certificate and Survey, residents will receive a refund of 10% of the examination fee and a certificate of participation. Those assessors/supervisors who complete the Survey will receive a certificate of participation.

***Timescale***

30 September 2025 EPA, Logbook and Guidance all finalised and available

 Volunteers can start completing the EPA and Logbook

13 March 2026 Deadline for booking Refraction Certificate examination

8 May 2026 Deadline for emailing Logbook and uploading approved Refraction EPA to ePortfolio

11-14 May 2026 Residents sit the Refraction Certificate

31 May 2026 Link to Survey issued to all participants

5 June 2026 Refraction Certificate results available

30 June 2025 Deadline for Survey completion

***Guidance and contacts***

RefractionPilot@rcophth.ac.uk Queries about the RP

[Whatsapp group](https://chat.whatsapp.com/BTRRjqavHIuB57APToWJCo?mode=ems_copy_c) All participants can join a WhatsApp group set up by the OTG Chairs

Frequently Asked Questions This will be regularly updated

12 September 2025