



Optometry Wales
Optometreg Cymru



QUALITY FOR OPTOMETRY SELF-ASSESSMENT TOOLKIT ACTION PLAN TEMPLATE

*One of the requirements for Quality for Optometry for 2025/26 is that practices must submit an action plan for all non-compliant elements of the self-assessment toolkit to their LHB by **31 March 2026***

Practices can use the below template or create their own

Name of practice ____A.N. Optometry Practice____

Practice Address _123 Any street, Cardiff, LL11 9LZ_____

Action plan completed by ____A. Jones_____(name) _____Optometrist_____ (Job Role)

Area of Action Plan	Element outstanding (list)	Required action	Date to be completed by	Update (N.B. Dates should be added to this section when the action is complete)
Safe	Health & Safety: <ul style="list-style-type: none">No lone working protocol Statutory & Mandatory training: <ul style="list-style-type: none">New member of staff recently started hasn't completed HEIW training	<ul style="list-style-type: none">Create lone working protocol * Include HEIW training in induction training for new member of team and future members of team	-End of April 2026 By May 2026	
Timely	No actions required			



Area of Action Plan	Element outstanding	Required action -	Date to be completed by	Update
Effective	QI Training: New member of team hasn't completed QI training	Include HEIW training in induction training for new member of team and future members of team	By May 2026	
Equitable	Sign in practice in relation to WGOS only in English Not currently recording patient choice of language on records	Arrange translation from LHB translation services and get sign displayed in both Welsh and English Remind all staff to record patient language choice on records	By May 2026 ASAP	
Person Centred	Duty of candour reporting	Review training for all practice members in respect of duty of candour reporting	ASAP	



Information Governance	<i>For this section a screenshot of the action plan created within the IG toolkit should be added</i>	<div><div>IG Action Plan</div><div>Inserting your priorities will enable you to generate your IG Action Plan.</div><div><div>Quarter 1</div><div>Priority One (Q1)</div><div></div><div>Priority Two (Q1)</div><div></div><div>Priority Three (Q1)</div><div></div></div><div><div>Quarter 2</div><div>Priority One (Q2)</div><div></div><div>Priority Two (Q2)</div><div></div><div>Priority Three (Q2)</div><div></div></div><div><div>Quarter 3</div><div>Priority One (Q3)</div><div></div><div>Priority Two (Q3)</div><div></div><div>Priority Three (Q3)</div><div></div></div><div><div>Quarter 4</div><div>Priority One (Q4)</div><div></div><div>Priority Two (Q4)</div><div></div><div>Priority Three (Q4)</div><div></div></div><div>Notepad</div><div></div></div>	31 March 2027	
-------------------------------	---	--	---------------	--