

Optical Orientation Training

General Operations:				
Checklist Items	Yes	Date	Trainer	Comments
Go over logins, timecards and email	<input type="checkbox"/>			
Read the Optical Manual and use as reference.	<input type="checkbox"/>			
Staffing & Management Flow Chart. Introductions.	<input type="checkbox"/>			
Daily opening & closing procedures.	<input type="checkbox"/>			
Doctor to dispenser - patient "hand-off" procedure.	<input type="checkbox"/>			
Patient flow through dispensary, from first visit to final delivery of eyewear.	<input type="checkbox"/>			
Chart flow through dispensary, from first visit to final delivery of eyewear.	<input type="checkbox"/>			
Recycling, waste & document disposal.	<input type="checkbox"/>			
Production goals & statistics - gathering, reporting & record storage.	<input type="checkbox"/>			
Understanding Ophthalmic Prescriptions:				
Checklist Items	Yes	Date	Trainer	Comments
Meaning of diopter, sphere, cylinder & axis.	<input type="checkbox"/>			
Basic lens forms - plus, minus, cylindrical, profile, thickness, etc.	<input type="checkbox"/>			
Transposition & Adds	<input type="checkbox"/>			
Prism	<input type="checkbox"/>			
Manual measurements (PD, OC, Seg)	<input type="checkbox"/>			
Lensometry – Check in procedures	<input type="checkbox"/>			
Understand the EMR, acuities, plan and new assessments.				

Performance Interview Planning Checklist

Understanding Ophthalmic Lens Products:				
Checklist Items	Yes	Date	Trainer	Comments
Lens styles - single vision, aspheric, bifocals, trifocals, PALs & occupational.	<input type="checkbox"/>			
Lens materials.	<input type="checkbox"/>			
Lens treatments.	<input type="checkbox"/>			
Train with Lab Representative on Hoya product knowledge				
Lens selection as related to the Rx, intended use, & cosmetic effect.	<input type="checkbox"/>			
Optikam and HVC Viewer App	<input type="checkbox"/>			
Price lists, calculating fees / computer pricing.	<input type="checkbox"/>			
Point of purchase materials - location & use of.	<input type="checkbox"/>			
Understanding Ophthalmic Frames:				
Checklist Items	Yes	Date	Trainer	Comments
Frame structure, terminology, distinguishing features.	<input type="checkbox"/>			
Frame size, color, manufacturer & markings. (Box Measurements)	<input type="checkbox"/>			
Frame materials.	<input type="checkbox"/>			
Frame styling & fit as related to Rx, intended use, facial structure, & cosmetic effect.	<input type="checkbox"/>			
Frame care & handling.	<input type="checkbox"/>			
Special display areas & keys for locked cabinets.	<input type="checkbox"/>			
Plano sunwear.	<input type="checkbox"/>			
Frame pricing, labels, computer entry.	<input type="checkbox"/>			
Location of technical frame product information.	<input type="checkbox"/>			

Performance Interview Planning Checklist

Eyewear accessories - location & use	<input type="checkbox"/>			
Understanding Ophthalmic Frames Continued:				
Checklist Items	Yes	Date	Trainer	Comments
Taking frames home to preview.	<input type="checkbox"/>			
Check in mail, frame shipment and invoices	<input type="checkbox"/>			
Frame Ordering: Learn process observe ordering and confirmations. Review Silhouette, Maui Jim & Recs Specs	<input type="checkbox"/>			
Manually trace a frame				
Under Observation: Help a patient out on the floor with a Repair	<input type="checkbox"/>			
Dispensing /Selling Skills:				
Checklist Items	Yes	Date	Trainer	Comments
General dispenser attitude - education vs. "hard sell."	<input type="checkbox"/>			
Patient lifestyle assessment.	<input type="checkbox"/>			
Flow of product presentation. -2 nd pair first. Lens design after.	<input type="checkbox"/>			
Calculation of fees, presentation of fees & closing the sale.	<input type="checkbox"/>			
Bill out Patients Exam onto Ledger	<input type="checkbox"/>			
Quotes for patients who "want to shop around."	<input type="checkbox"/>			
View the lens pricing list, kid's package, and value package pricing	<input type="checkbox"/>			
Under Observation: Call patients to let them know eyewear is ready, mark notified in Compulink)	<input type="checkbox"/>			
Make a Compulink record for yourself	<input type="checkbox"/>			
Work on the Spectacle Screen and enter practice Orders	<input type="checkbox"/>			

Performance Interview Planning Checklist

Dispensing /Selling Skills Continued:				
Checklist Items	Yes	Date	Trainer	Comments
Filling outside Rxs.	<input type="checkbox"/>			
Bill out Patients Exam onto Ledger	<input type="checkbox"/>			
Print a patients prescription	<input type="checkbox"/>			
Under Observation: Begin entering orders	<input type="checkbox"/>			
Explain uncut and edge and mount (show where each order goes)	<input type="checkbox"/>			
Under Observation: Help a patient out on the floor with a Dispense	<input type="checkbox"/>			
Under Observation: Begin entering orders on DVI manually and Bridge	<input type="checkbox"/>			
Compulink University & Insurance Training				
Checklist Items	Yes	Date	Trainer	Comments
Compulink 101 and Quiz	<input type="checkbox"/>			
Compulink Spectacle Order WebEx& Quiz	<input type="checkbox"/>			
Compulink Ledger Posting 1 & 2 plus Quiz	<input type="checkbox"/>			
Pull an EyeMed Authorization	<input type="checkbox"/>			
Pull a MN-Its Authorization	<input type="checkbox"/>			
Pull an Eyefinity & VSP Compulink Authorization	<input type="checkbox"/>			
Medicare Advance Beneficiary Notice	<input type="checkbox"/>			
Medicare forms and processes	<input type="checkbox"/>			
Show MN-Its and explain differences between EyeKraft and Korrect	<input type="checkbox"/>			
Under Observation: Order through Korrect and EyeKraft	<input type="checkbox"/>			
Review Pediatric Vision Benefit	<input type="checkbox"/>			

Performance Interview Planning Checklist

Conclusion				
Future Planning Checklist Items	Yes	Date	Trainer	Comments
Half Day with Billing in Fridley	<input type="checkbox"/>			
Career Path Training	<input type="checkbox"/>			
Learn about Inventory	<input type="checkbox"/>			
One full final day of Optical Manager reviewing these competencies and reviewing job performance.	<input type="checkbox"/>			
Optical Manager will send out an email stating you are ready to work independently and accept patient handoff's from the Doctors.	<input type="checkbox"/>			