

OBSERVATION LIST

Front Desk

Did staff greet patient with a smile

When busy does staff acknowledge pt.

Verify Demographics

Update most recent insurance information.

Collect co-payments.

Ask about Glasses/Contact lenses.

Are e-mail addresses being collected.

Collect secondary phone numbers.

Insurance information scanned and in compulink.

Call no shows within 10 minutes of appointment time.

Follow all other no show procedures as outlined in procedure manual. (*attached*)

Collect old balances. (*list provided daily from OSG*)

Make arrangements for payments for self pay patients.

Work recall list that televox does not get a hold of.

Call all 1 year returns 2 weeks in advance to confirm/remove from schedule if no valid

information to contact patient. (*PRINT ORIGINAL SCHEDULE*) *keep for comparison for that appt day.*

2 days before appointment confirm all patients that Televox could not confirm.

Scan all necessary documents in patients file daily.

Check Out

At check out did staff greet patient with a smile.

When busy does staff acknowledge pt.

Did staff thank patient.

Was return appointment made.

Make IDPA refractive appointments for the slow months.

Were all patients asked about family members.

Make and document all return appointments.

Send yearly diabetic letters to primary care physician.

Are demographics for meaningful use being obtained.

Optical

Greet patient and introduce yourself as their optician.

Optician smiles and is friendly with the patient.

New frames put on boards immediately.

Frame boards full, clean, no markings on demo lens./Double check before going home by optical & supervisor.

Contact patients early in the day for glasses and cl pick ups same day received.

Call backs within 7 days from dispense/Thank you cards.

Asking for 100% payments.

Walk trays daily.

Accurate Inventories MONTHLY as scheduled/ Variances will be discussed.

Verify that contact lens trial kits are full and no expired lenses.

Get 100% payment on orders. Review purchase and then ask how will you be paying today?

Order Supplies/frames regularly per specified schedules.

Optical desk clean at all times. (*Hippa*)(*presentation*)

Double check all lab orders to ensure labs receives the correct order for the patient.

frame*lens*lens options*measurements*sent to the correct lab
Return appointments to be made BEFORE proceeding with the sale.
Optician is lifestyle selling to the patient with product knowledge
Optician understands pricing and competitors.
Eyeglass and contact lens forms are signed and scanned daily.
Contact lens orders are correct and on the ledger.
Measurements and frame info is double checked at order.
Optician is able to explain insurance benefits to the patients.
Optician/Support staff explains to all patients competitor pricing. (WE HAVE THE LOWEST PRICE GUARANTEE).
Optician/Support staff is able to do repairs and adjustments.
Optician to verify recall appointment has been made for pt.
Collect contact lens fitting fee in advance of giving trials.
Dispensing trials REQUIRES doctor authorization.
Eyeglass waivers signed and scanned at time of order/ not at dispense.
Optical paperwork scanned daily.
Final notice patients at 45 days. Send back in 60 days.
Remove measuring marks from demo lenses before returning to the board.
Clean frames at least once weekly.
IDPA patients are to be given 3 month delivery card and offered a 2cnd pair at self pay.
Tech
Greet patient (introduce yourself as their tech).
Ask about eyeglass contact lens needs.
Knowledgeable about eyeglass lenses to start recommendations to patient per lifestyle sheet information.
Stock and clean rooms.
Rotate drops and other medications, those with most recent expiration date to the front of shelf.
Turn room lights off when not in use.
MD offices should always have culture plates.
Answer call lights promptly.
No gathering around tech desk talking.
Proper EHR documentation.
Type of diabetic and number of years to be written at the top of the page in red.
Allergies to be written at the top of the page in red.
Patients name at the top of every page.
Use appropriate chart sleeve (red-dupes, orange-Lasik, yellow-surgery, pink-diagnostic testing).
There must be an order in the chart for any testing that is done or being scheduled.
Supervisor Duties
UNROLL PHONES IMMEDIATELY UPON ARRIVAL TIME. (<u>not opening time</u>).
E-mail to Dr. Kippenbrock staffing/Doctor coverage.
Print and work through TeleVox report.
Run next days schedule, check for balances. (<u>Compare to OSG report</u>).
Look at schedules at least a week out to see if any problem days need to be worked on.
Check for any repair & Safety problems. Report ASAP.
Put out flag daily. (Weather Permitting).
Audit superbills.
Visit nursing homes and offer our repair & cleaning service.
Walk ground every morning and pick up trash.
Bathrooms to be check minimum twice daily for cleanliness and supplies.

Waiting room should be picked up mid-day.
Communicate any new policies to staff. Check for understanding and execution of all policies.
Constantly listen to staff, coach and make corrective measures.
Get coverage in case of illness. Utilize call in tree in your area. (Ensure employees allowed per pt.ratio is followed).
Landscaping/Seasonal care. Weeds, watering. Ice, snow maintenance.
Leads by example and maintains professional composure at all times.
Diabetic letters sent once per year.
Complete associate or patient incident reports and send to Rita.
Audit appointments for recalls in compulink.
Ensure patients are being told to bring their eyeglasses, contact lens, foils or meds as applicable.
Conserve energy, all lights turned off when not in use.
Ensure eyeglass repairs, dispensings are done for patients timely and properly no matter who is working.
Knows competitors and their pricing.
Ensure all signed patient documents are scanned in a timely manner.
Ensures cross training for self and staff is ongoing to be prepared for unplanned circumstances.
Proper EHR documentation.
Maintain training file for self and associates.
Treats all associates fairly.
Listens to staff and coaches, recognize or take corrective action as warranted.
Notify Deb Stahulak with any new businesses that would have safety plans.



