**Staff Management & Customer Service in the Ophthalmic World - TRAINING THE CLINICAL & OPTICAL STAFF**

Lecturer: M. Patrick COLEMAN, ABOC, COT

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**Learning Objectives:**

1. Identify the difference between a knowledge only item & a skill area
2. Correctly code a training item for the level of knowledge and/or skill required
3. Properly assess a training program for progress & effectiveness, then close the loop

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**Training Made Easy!**

1. Tell one
2. Show one
3. Do one

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**First - Define the Job Description**

- Analyze the position & determine what a person needs to **KNOW** & **DO** to succeed
- Differentiate between **KNOWLEDGE** & **SKILLS** – not the same!
- **Document** your work; can use codes to indicate level of knowledge or skill required for each item

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**Define the Job Description (cont.)**

- Analyze the position & determine what a person needs to...
- **KNOW** &
- **DO** ... to succeed

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**Define the Job Description (cont.)**

Start with the **SKILLS** needed to do your job?
- Use a CPU?
- Answer a phone?
- Find ICD & CPT codes?
- Look up insurance plans?
- Insert contacts in the eye?
- Select & adjust spectacle frames?
- Operate equipment (NCT? Lensometer? VF?)

Once you know the **SKILLS**, you can figure out what **KNOWLEDGE** will be required!
Subject KNOWLEDGE means you **KNOW STUFF**, but can’t necessarily **DO STUFF**

- **Subject Knowledge** Levels:
  - A: Can identify basic facts and terms about the subject.
  - B: Can identify relationship of facts and state patient principles about the subject.
  - C: Can analyze facts and principles and draw conclusions about the subject.
  - D: Can evaluate conditions and make proper decisions about the subject.

**Task PERFORMANCE**

Means you can **DO STUFF**

- **Task Performance** Levels:
  - 0: Can do simple parts of the task. Needs to be told or shown how to do most of the task.
  - 2: Can do most parts of the task. Needs help only on the hardest parts.
  - 3: Can do all parts of the task. Needs only a spot check of completed work.
  - 4: Can do the complete task quickly and accurately. Can tell or show others how to do the task.

**Define the Job Description (cont.)**

- **Document your work**: use **codes** to indicate level of **knowledge** or **skill** required for each item indicated.

  One way is to use **NUMBERS** for **SKILLS** (since tasks are done in order; i.e., Step 1, then Step 2, etc.)
  
  &

  Use **LETTERS** for **KNOWLEDGE** (since we get knowledge from reading)
Assess Employee’s Current Level of Knowledge & Skill (cont.)

1. Assess **KNOWLEDGE**
   a. **Written Quiz**
   b. **Oral Questioning**

**Performance Checklist** (example)

MAKE PEANUT BUTTER & JELLY SANDWICH

1. Asked patient if they are allergic to peanuts (if patient was allergic, STOPPED procedure)
2. Gathered items needed:
   a. 2 slices of Bread
   b. Peanut butter (JIF is best)
   c. Grape jelly
   d. Butter knife
   e. Plate or cutting board or clean counter-top
3. Opened peanut butter jar & got big glob out with knife
4. Smeared peanut butter on one slice of bread (evently)
5. Closed peanut butter jar
6. Opened jelly jar & got a big glob out with knife
7. Smeared jelly on other slice of bread
8. Closed jelly jar
9. Placed two pieces of bread together so peanut butter side and jelly side meet

Assess Employee’s Current Level of Knowledge & Skill (cont.)

1. Assess **SKILLS**
   a. Must see trainee do the task!
   b. Questioning can help before assessing skills, **but you must observe actual performance before certifying competency**
2. A performance **CHECKLIST** helps!

* Implement the training program

- **Assign a trainer**; could be more than one person
- **Set goals** for progression
- **Assess progress**; adjust training as needed
- **Solicit trainee feedback**; adjust training as needed
- **Document** and get signatures from trainer & trainee
Implement the training program (cont.)

**Assign a trainer** (could be more than one person)
- Must be someone that has the **KNOWLEDGE & SKILLS** to train someone else
- You might use several trainers...
  - Different people might be ‘**experts**’ on a particular task
  - Should make one person “lead trainer” for consistency & documentation purposes

Implement the training program (cont.)

**Set goals for progression**
- **If no deadline**, training gets pushed aside!
- Adjust ‘goals’ based on person’s background and experience level
- **Supervisor**: need to stay on top of trainer & trainee; doesn’t matter to you? Won’t matter to them!

Implement the training program (cont.)

**Assess progress**: adjust training as needed:
- Is training **going faster** than expected? AWESOME! Adjust training timeline as needed.
- Is training **going slower** than expected? Determine **OBSTACLE** to progress & **fix problem**
- **Trainee super great**? Might EXPAND their role and train them on more ‘stuff’!
- **Trainee below average**? Consider letting them go, or reassess position you want them to fill

Implement the training program (cont.)

**Solicit trainee feedback** (adjust training as needed)
- **Do NOT do this in front of trainer!**
- **Trainer & Trainee** may “see” things differently; the **trainee** may help you understand **WHY** they aren’t learning as fast, or as much, as you expected (**and it might be the TRAINER’s fault!**)!
- Soliciting input & feedback shows employee you care about **THEM** & their **SUCCESS**

Implement the training program (cont.)

- **Document & get signatures (or initials) from trainer & trainee**
- BEST to have a separate person **CERTIFY** that the trainee knows what they were trained to know!
  - If you use a “**certifier**”, have them sign (or initial), too

Document and get signatures from trainer & trainee (cont.)

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1. Tasks, Knowledge, And Technical References
2. Certification For ODT
3. Pre-requisite Code-Word

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- **10. BASIC OPTICS**
  - **The Optometric Assistant** (ch. 10), **Prepraxis Preparation For ODCCE** (ch. 12 and 13)
  - **10.1. Use optical aids**
  - **10.2. Threes or propagation of light**
  - **10.3. Wavelength**
Document and get signatures from trainer & trainee (cont.)

**TRAINING THE CLINICAL & OPTICAL STAFF**

**Summary & Conclusion**

*Today you learned how to:*

1. Identify the difference between a knowledge only item and a skill area
2. Correctly code a training item for the level of knowledge and/or skill required
3. Properly assess a training program for progress and effectiveness, then close the loop

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