

Dear Fellow O.D. and/or Manager,

Allow me to provide you with a bit of background on what led to the creation of “Eye Got This.” I spent my first two years as a business owner operating my practice alone, including answering phones, scheduling, authorizing and submitting insurance benefits, selling and ordering contacts, and collecting payments. This was in addition to doing the eye exams. After two years, I finally sucked it up and hired my first staff member. She had no experience in any sort of medical setting. But, she was kind and personable. And I could tell she was very sharp. So, soon after I hired her, I created a guide that outlined step-by-step how to perform her daily tasks which, at first, included answering phones, scheduling, pulling up VSP and EyeMed benefits, submitting exam/contacts to insurance, and selling/ordering contacts. Within two weeks, she was able to perform these tasks seamlessly, with virtually no hand-holding. I later found that these training guides I had created also worked well for future employees.

After recently speaking with a few colleagues, I started to realize that not many others had these sorts of training guides for their new hires. Hence the creation of the “Eye Got This” training manual, in an attempt to help my fellow O.D. business owners, since I know how overwhelming it is to train a new staff member. Staffing can be the biggest challenge of owning a business. Yet it can also be the greatest reward, if you are able to successfully provide the training and confidence necessary for your team to thrive. Over the years, I have found it easier to train a person with NO experience than attempt to retrain someone with experience, mainly because I have found it incredibly difficult to untrain bad habits. I strongly believe that if you are diligent and methodical with the training you provide your new team member during their first few months, it will pay off tremendously in the long run. My manual assumes that your new hire has no experience in the eyecare industry and assumes that you have done your due diligence in the hiring process, including at least one working interview and HIPAA training.

Not only will this manual train your new hire but it will provide YOU, the manager, with guidance as well. The weekly quizzes serve as a sort of record that certain aspects of the job were trained and expectations were clear. It is important to note that after your new hire completes this manual, training is in no way complete. This is solely my attempt to provide a coherent training plan during your new hire’s trial period, while ensuring they pass the necessary “tests” that are, in my opinion, required to keep the job. This includes: ensuring that they are a fast learner and eager to learn, not afraid to ask questions, able to work well with others, comfortable with sales, good with numbers, and able to follow written directions. Should your new hire pass their trial period with flying colors, there are other wonderful resources available in the industry for furthering their opticianry education and eventual possible ABO certification, should they so desire.

I sincerely hope that you find this guide useful and that it will help your new employee and practice thrive. Happy training!

Neka Amato, O.D.

As the owner, here is what I recommend you do before training commences:

- Establish a well-defined role and outline the job requirements for your new hire
- Read the entire manual and determine what pieces do not work well for your practice
- Determine what pieces of training are missing from the manual in accordance with your practice's needs. For example, if Medicaid is a huge part of your practice, you may want to add Medicaid training to the first 12 weeks. *The reason why I only included VSP and EyeMed in the manual is because, after speaking with many others, it seems that these are the two largest insurances that private practices deal with. Plus, I did not want new hires getting overwhelmed by attempting to learn the ins and outs of 10 different insurances during their first few weeks*
- Determine if the order of training makes sense, given your practice's needs
- Decide who will mainly be providing the training (i.e. decide who the person is that is referred to as the "manager" within the manual)
- Be aware of the fact that you may first need to retrain your more seasoned staff member(s) if they already have "bad habits," especially with sales. They should read the manual as well. If you fail to do so, your new hire will likely just mimic this seasoned staff member's habits instead of following what is outlined within the manual, resulting in less overall success for your practice
- Whoever is designated as the "trainer" needs to remember to set aside about 30 minutes of time at the end of each week to review the weekly quiz and assist with the hands-on activities, when indicated, with the new hire. *Please note that there is intentionally NO answer key for the quizzes, since a lot of the answers will be practice-dependent*
- Determine what this "12 week training" guide means for you. If your new employee does really well during their first 12 weeks, do they perhaps get a small raise? What further education will you need to provide your new employee that goes beyond the scope of this manual, for your practice's needs?

The manual assumes you have given your new hire the following lists:

- Vision insurances with which you are in-network
- Medical insurances with which you are in-network
- Eye Exam pricing (92004, 92014, 92015)
- Contact Lens Evaluation Pricing (spherical, toric, etc)
- Info needed from the patient in order to pull up benefits for each insurance you accept