



INDEPENDENT
OPTOMETRIC COACHING

Employee Training Checklist

Date	Overview	Initial
	Practice philosophy	
	Optometrist, Ophthalmologist, Optician	
	Therapeutically licensed	
	Common terminology	
	Basic phone etiquette	
	Desired greeting and use of your name	
	Basic Optics – Myopia, Hyperopia, Presbyopia – Near/Farsighted	
	Procedure codes	
	Understanding insurance in your department	
	Payment Policies	
	HIPAA	
	Front Desk	
	Proper phone messaging	
	How and when to schedule appointments	
	Collecting patient information	
	Triaging medical phone complaints	
	What defines an emergency	
	Insurance verification	
	Optical	
	Proper greeting	
	Doctor hand off	
	How to manage walk in guests	
	Loss prevention and safety	
	Outside RX procedures and transposing	
	Determining prescriptions – SV, BF, TRI, PROG	
	Ensuring patient understands what they're getting	
	Premium product sales	
	Features and benefits with need based selling	
	Offering products vs Packaging products	
	Frame types – Rimless drill mount, plastic, Metal	
	Proper names for frame parts (temple, face, hinges, spring hinge)	
	Basic face shapes and key points to a great frame style	
	Skin conditions	
	Basic adjustments and spotting a poor fit	
	Professional recommendations vs you "like" that one	
	Promise dates – Under promise and over deliver	
	Explaining how to clean and care for eyewear	
	Dispense eyewear as if it were high end jewelry	

	Resell the glasses, point out features and give compliments	
	Confirm the purpose	
	Invite the patient back for adjustments	
	Technician	
	What is a comprehensive eye exam	
	Common pathology and terminology	
	Medical abbreviations	
	Pre testing instruments – AR, NCT, FDT	
	Specialty testing equipment	
	Slit lamp, phoropter and other instruments in the lane	
	Dilation drops and instillation (ask before)	
	How to up sale medical testing	
	Gathering patient information	
	Visual acuity, stereo and color testing	
	Types of contact lenses and materials	
	Ocular dominance	
	Fitting contacts and how to spot a poor fit	
	Year supply sales – Package year total vs by the box price	