

UW HEALTH JOB DESCRIPTION

Lead Optician

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| Job Code: 920005 | FLSA Status: Nonexempt | Mgt. Approval: | Date: |
| Department : Ophthalmology | | HR Approval: | Date: |

JOB SUMMARY

The Lead Optician is responsible in overseeing and mentoring optical staff. A Lead Optician also assists patients in the selection, ordering, verifying and dispensing of eyeglasses and contact lenses in order to best fit their vision and comfort needs, while maintaining current knowledge of products available. This position serves as a link between the doctors and optical labs in interpreting prescriptions and visual needs; performs eyeglass repairs and adjustments; is responsible for billing of purchased materials accurately and efficiently; and is also responsible for ordering supplies, stocking materials, and financial reconciling for cost of goods. The Lead Optician is also responsible for providing direction, observing, coaching, and motivating staff to achieve objectives and provide excellent patient care, while leading by example.

MAJOR RESPONSIBILITIES

ALL DUTIES AND REQUIREMENTS MUST BE PERFORMED CONSISTENT WITH THE UW HEALTH PERFORMANCE STANDARDS.

1. Inform and educate patients of available frame styles, lens designs, other options, etc. and assists patients with selection of eyewear best suited for their lifestyle, prescription and personal needs. Repair eyewear when necessary.
2. Schedule and conduct instruction sessions for teaching insertion, removal, and care of disposable and specialty/custom contacts. Clean and polish patients' hard and gas permeable contacts.
3. Analyze prescriptions and interpret them accurately; take interpupillary distance and fitting measurements for correct fit of eyewear. Complete and process patient orders to be filled by optical laboratories.
4. Maintain, clean, and repair optical equipment as necessary.
5. Notify patients when orders are completed. Dispense eyewear to patients, verify proper fit, expected vision, payment, order accuracy, and make adjustments necessary for comfortable eyewear.
6. Advise patients on insurance coverage, promotions and other available options. File insurance accurately and timely.
7. Ability to accurately record patient and order data in computer system. Complete customer billing/service records.
8. Inspect and verify eyewear received for proper specifications according to ansi-standards.
9. Review communication daily; ensure timely correspondence with emails relating to daily job functions. Review, update and develop optical policies and procedures as requested.
10. Monitor current pricing structure, maintain productivity and profit margins.
11. Organize and submit proper billing of optical patient charges, reconciling of monthly optical billing statements for credits and charges from vendors. Research and correct billing problems.
12. Partner with clinic staff, troubleshooting patient eyewear when necessary; take action to maintain a high level of patient satisfaction.
13. Ensure patient satisfaction of all services rendered; handle patient service issues as they arise, resolve fairly and timely with manager input.
14. Monitor inventory budget and manage the purchase of all optical inventory, equipment, and supplies.
15. Update and maintain current marketing for optical products and eyewear by ordering necessary resources (pamphlets, demo tools), creating engaging merchandise displays, and providing a professional atmosphere.
16. Maintain an organized, professional setting in the optical dispensary as well as a clean and neat work area.
17. Responsible for meeting with representatives to determine or assist in frames selection to be purchased for department's stock and ordering such frames; return products to manufacturers timely.
18. Answer department phone, address patient questions, and give directions or quotes when necessary. Respond timely to messages from patient and care team.
19. Balance ledgers and reconcile financial transactions and deposit within the department daily.
20. Attend and actively participate in occasional staff meetings to maintain and expand knowledge in relation to advances in the eye care industry, improve technical skills and service levels for patients.
21. Verify patient chart history. Ensure patient's visual and auditory privacy and maintain patient confidentiality at all times. Ensure HIPAA compliance standards are met.
22. Promote patient welfare and independence by communicating through words and actions and understanding of patients' feelings and reactions to the healthcare environment.
23. Provide emergency care to patients when necessary, maintaining basic CPR certification.
24. Interact with staff and co-workers in a manner that promotes positive working relationships.
25. Demonstrate proficiency in use of the computer for all aspects of patient care and documentation.
26. Meet all required competencies and maintain skill level.
27. Complete required Annual Review and Safety, Compliance, and Infection Control exams.
28. Flexibility to travel to various optical locations as needed.
29. Solve problems and make guided decisions about area function and patient care issues.
30. Provide organizational and clerical support to facilitate optimal patient care and area operation.
31. Participate in the interviewing, selection, orientation, and training process, maintain staff training and coaching file documentation; provide input for staff performance evaluations.
32. Assist in scheduling staff as needed. Provide input of day to day operations for decision making process.
33. Encourage and promote staff involvement and participation within the organization.
34. Engage in the planning process, implementing strategies; follow up, accountability with completion of objectives and more as provided

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by the department supervisor. Assist in implementation of policies and procedures and ensure compliance.

JOB REQUIREMENTS

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| Education | Minimum | High School Diploma or equivalent |
| | Preferred | <ul style="list-style-type: none"> Completion of an accredited Optician Vision Care Program Some continued education courses |
| Work Experience | Minimum | <ul style="list-style-type: none"> Computer experience required Previous eye care experience Minimum 1 year or more supervisory or leadership experience |
| | Preferred | <ul style="list-style-type: none"> 1 or more years optician experience Lab training or experience preferred Contact lens training or experience preferred Optical lab experience and/or optometric technician experience 1 or more years of work experience with processing insurance claims |
| Licenses & Certifications | Minimum | Obtain ABO Certification within 18-months or three (3) testing periods from the date of hire, and maintain the certification |
| | Preferred | American Board of Opticianry (ABO) Certification and/or National Contact Lens (NCLC) Certification |
| Required Skills, Knowledge, and Abilities | | <ul style="list-style-type: none"> Excellent patient services skills Excellent organizational skills Excellent Interpersonal and Communication skills Knowledge and understanding of eyewear designs and uses Understanding of optical business practices and procedures Demonstrated ability to facilitate meetings, negotiate with and influence others |

AGE SPECIFIC COMPETENCY (Clinical jobs only)

Identify age-specific competencies for direct and indirect patient care providers who regularly assess, manage and treat patients.

Instructions: Indicate the age groups of patients served either by direct or indirect patient care by checking the appropriate boxes below. Next,

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|-------------------------------------|-----------------------------|-------------------------------------|------------------------------|
| <input checked="" type="checkbox"/> | Infants (Birth – 11 months) | <input checked="" type="checkbox"/> | Adolescent (13 – 19 years) |
| <input checked="" type="checkbox"/> | Toddlers (1 – 3 years) | <input checked="" type="checkbox"/> | Young Adult (20 – 40 years) |
| <input checked="" type="checkbox"/> | Preschool (4 – 5 years) | <input checked="" type="checkbox"/> | Middle Adult (41 – 65 years) |
| <input checked="" type="checkbox"/> | School Age (6 – 12 years) | <input checked="" type="checkbox"/> | Older Adult (Over 65 years) |

JOB FUNCTIONS

Review the employee's job description and identify each essential function that is performed differently based on the age group of the patient.

PHYSICAL REQUIREMENTS

Indicate the appropriate physical requirements of this job in the course of a shift. *Note: reasonable accommodations may be made available for individuals with disabilities to perform the essential functions of this position.*

| Physical Demand Level | Occasional Up to 33% of the time | Frequent 34%-66% of the time | Constant 67%-100% of the time |
|---|-------------------------------------|---|---|
| <input type="checkbox"/> Sedentary: Ability to lift up to 10 pounds maximum and occasionally lifting and/or carrying such articles as docket, ledgers and small tools. Although a sedentary job is defined as one, which involves sitting, a certain amount of walking and standing is often necessary in carrying out job duties. Jobs are sedentary if walking and standing are required only occasionally and other sedentary criteria are met. | Up to 10# | Negligible | Negligible |
| <input checked="" type="checkbox"/> Light: Ability to lift up to 20 pounds maximum with frequent lifting and/or carrying of objects weighing up to 10 pounds. Even though the weight lifted may only be a negligible amount, a job is in this category when it requires walking or standing to a significant degree. | Up to 20# | Up to 10# or requires significant walking or standing, or requires pushing/pulling of arm/leg controls | Negligible or constant push/pull of items of negligible weight |
| <input type="checkbox"/> Medium: Ability to lift up to 50 pounds maximum with frequent lifting and/or carrying objects weighing up to 25 pounds. | 20-50# | 10-25# | Negligible-10# |
| <input type="checkbox"/> Heavy: Ability to lift up to 100 pounds maximum with frequent lifting and/or carrying objects weighing up to 50 pounds. | 50-100# | 25-50# | 10-20# |

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| | Very Heavy: Ability to lift over 100 pounds with frequent lifting and/or carrying objects weighing over 50 pounds. | Over 100# | Over 50# | Over 20# |
|--|---|---|-----------------|-----------------|
| List any other physical requirements or bona fide occupational qualifications: | | <ul style="list-style-type: none"> • Physical Activity: Primary working position standing, with occasional sitting, walking, climbing, balancing, stooping kneeling, and crouching; involves reaching, carrying, lifting (see demands), pushing, fingering, grasping, feeling, talking, hearing-conversation level and high acuity, seeing-hear, color vision, and depth perception • Personal/Physiological: Interaction with people, working with people and on own, various duties with occasional changes, and intra-organizational and external communications | | |

Note: The purpose of this document is to describe the general nature and level of work performed by personnel so classified; it is not intended to serve as an inclusive list of all responsibilities associated with this position.