

## UW HEALTH JOB DESCRIPTION

### Lead Ophthalmic Technician

<b>Job Code: 920003</b>	<b>FLSA Status: Non-Exempt</b>	<b>Mgt. Approval: P. Zellmer</b>	<b>Date: June 2019</b>
<b>Department : Ophthalmology</b>		<b>HR Approval: J. Tokarski</b>	<b>Date: June 2019</b>

### JOB SUMMARY

The Lead Ophthalmic Technician is an advanced-level position including a wide variety of clerical, technical, and patient related functions under minimal supervision. The Lead Ophthalmic Technician performs all of the duties of the associate/objective level ophthalmic technician with greater independence, including clinic flow management, patient check-in; medical record review, preparation for the visit, patient education, assistance with medical examinations, treatments, and procedures, coordination and scheduling of tests, appointments, and surgeries, coordination of area work assignments, protocol review and update, and quality assurance checks.

In addition to performing and overseeing such tasks, the Lead Ophthalmic Technician is also a mentor and role model for the Ophthalmic Assistants and Technicians and functions as a lead worker for support staff. The Lead Ophthalmic Technician may also participate in Ophthalmic Technician continuing education by developing content and/or teaching classes. As a member of the patient care team, including registered nurses, assistants, technicians, orthoptists, clerical staff, medical students, residents, and faculty physicians, the Lead Ophthalmic Technician is also aware of the psychosocial needs of patients and families.

### MAJOR RESPONSIBILITIES

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

#### Direct Patient Care Responsibilities:

- Provide patient care under minimal supervision of a physician, nurse practitioner (NP), physician assistant (PA) or registered nurse, relative to the patient's age specific needs and under various conditions.
- Perform patient check in, including obtaining and recording vital signs, height, weight, chief complaint, brief relevant history including pain status, allergies, current medication and any other pertinent information for specific age groups. Prepare patient for examination or procedure, as appropriate
- Review medical records for up-to-date master problem list including patient reported medication and allergies and diagnoses that are documented by physicians or providers.
- Ensure patient's visual and auditory privacy and maintain patient confidentiality at all times.
- Understand that the stress of illness may alter patient behavior and ability to follow through on plan of health care; interact with respect including situations where patient and/or family display anger or distress.
- Provide support and comfort to patients and families during clinic visits and procedures as needed, including chaperoning during sensitive examinations.
- Promote patient welfare and independence by communicating through words and actions and understanding of patients' feelings and reactions to the healthcare environment.
- Participate in patient education by providing structured written/verbal information to patients regarding procedures, preparation for diagnostic tests, and chronic disease conditions as instructed by RN/MD, for patients not requiring special adaptations. Refer patients who require further teaching interventions to an RN or provider.
- Provide emergency care to patients when necessary using basic life support and automated defibrillator protocols, maintaining basic CPR certification.
- Document complete and accurate patient observations, care and outcomes of interventions and enter in the paper or electronic medical record.
- Report pertinent observations and information, both written and verbal, to appropriate personnel.
- Contribute to individual patient care planning.
- Coordination of records and maintenance of equipment in CLIA lab if applicable.
- Assist provider with procedures including those requiring aseptic and sterile technique
- Calibrate and maintain ophthalmologic equipment to ensure proper working order.
- Responsible for routine maintenance and do minor repair of ophthalmic equipment.
- Establishes periodic maintenance schedules for equipment and set standards for evaluation of function.
- Demonstrate advanced knowledge of ophthalmic photography principles and how these relate to patient care, research, and education.
- Works with management to ensure JCAHPO and HIPPA compliance with patients seen in the clinic and with all equipment used in the clinic.
- Works with management, physicians and optometrists to ensure optimal patient flow by monitoring/enhancing clinic templates.

#### Team Member Objective:

- Communicate effectively with patients/families and the clinic team.
- Interact with staff and co-workers in a manner that promotes positive working relationships.
- Function as a patient care team member contributing to individual patient care planning.

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- Comply with the UWH patient satisfaction, customer service, and ambulatory care standards.
- Lead quality improvement projects.
- Attend and actively participate in staff meetings.

### Supply and Equipment Maintenance:

- Following current isolation procedures, clean exam rooms, procedure tables, equipment and other work areas according to guidelines.
- Stock clinical workstations, exam/procedure rooms as assigned, inventory specialty items and initiate reorder of supplies as needed.
- Report non-functioning or defective equipment to supervisor immediately.
- Ensure all supplies are up to date and replace expired materials as necessary, including procedure trays, following reprocessing procedures.

### Daily Functioning:

- Solve problems and make guided decisions about area function and patient care issues.
- Provide organizational and clerical support to facilitate optimal patient care and area operation.
- Demonstrate proficiency in use of the computer for all aspects of patient care and documentation.
- Facilitate the coordination of patient services within the clinic and other departments, e.g. radiology, clinical lab, etc.
- Prepare/maintain medical records, including ordering, filing, and copying when appropriate.
- Adhere to National Patient Safety goals.

### Professional Development & Continuing Education:

- Complete all required competencies and maintain skill level.
- Complete required Annual Review and Safety and Infection Control exam
- Recognize the need for continued learning by attending staff development programs and workshops.
- Lead and serve on task force/committees as requested.

### Community Service:

- Participate in public education programs as may be sponsored by UWH and the Department of Ophthalmology.
- Participate in development and implementation of hospital outreach programs related to ophthalmology.
- Participate in community requests for patient education and designated screening programs that relate to disorders of the eye or normal eye care.

### Lead Technician Responsibilities:

- Coordinate work assignments to assure that needed staff is available and prepared.
- Requests clinic supplies as needed.
- Reviews schedules and space needs to anticipate and make any needed changes in staffing or provider schedules for the clinics they coordinate.
- Review, update and develop selected clinic policies and procedures as requested.
- Conduct quality review/audits of processes, equipment and supply use to improve care, increase efficiency or reduce cost as needed.
- Develop the schedule and oversee the new Ophthalmic Technician orientation. Verify their competency checklist.
- Develop the schedule and oversee the student and mentoring programs and assist with paper work as required

**Perform Additional Duties as requested.**

## JOB REQUIREMENTS

Education	Minimum	High school diploma or equivalent
	Preferred	Completion of an accredited Ophthalmic/Optometric program or Medical Assistant program
Work Experience	Minimum	Two (2) years of experience as Certified Ophthalmic Associate (COA)
	Preferred	Two (2) years of experience as a Certified Ophthalmic Technician COT Prior supervisory or coordinator experience
Licenses & Certifications	Minimum	Certified Ophthalmic Associate Must complete certification as Ophthalmic Technician (COT) within 18 months.
	Preferred	Certified Ophthalmic Technician
Required Skills, Knowledge, and Abilities		<ul style="list-style-type: none"> <li>• Demonstrated ability to perform Ophthalmic technician responsibilities at a consistently high level of independence and competence.</li> <li>• Demonstrated leadership skills with initiative and active problem solving.</li> <li>• Demonstrated ability to mentor and orient other team members.</li> <li>• Conflict management skills and ability to maintain composure in a high stress, fast paced environment.</li> <li>• Demonstrated customer-first attitude and philosophy.</li> <li>• Strong oral and written communication skills.</li> </ul>

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	<ul style="list-style-type: none"> <li>• Knowledge of and proficient use of computers.</li> <li>• Knowledge and understanding of medical terminology.</li> </ul>		
<b>AGE SPECIFIC COMPETENCY (Clinical jobs only)</b>			
Identify age-specific competencies for direct and indirect patient care providers who regularly assess, manage and treat patients.			
<b>Instructions:</b> Indicate the age groups of patients served either by direct or indirect patient care by checking the appropriate boxes below. Next,			
	Infants (Birth – 11 months)		Adolescent (13 – 19 years)
	Toddlers (1 – 3 years)		Young Adult (20 – 40 years)
	Preschool (4 – 5 years)		Middle Adult (41 – 65 years)
	School Age (6 – 12 years)		Older Adult (Over 65 years)
<b>JOB FUNCTIONS</b>			
Review the employee's job description and identify each essential function that is performed differently based on the age group of the patient.			
<b>PHYSICAL REQUIREMENTS</b>			
Indicate the appropriate physical requirements of this job in the course of a shift. <i>Note: reasonable accommodations may be made available for individuals with disabilities to perform the essential functions of this position.</i>			
<b>Physical Demand Level</b>		<b>Occasional</b> Up to 33% of the time	<b>Frequent</b> 34%-66% of the time
		<b>Constant</b> 67%-100% of the time	
	<b>Sedentary:</b> Ability to lift up to 10 pounds maximum and occasionally lifting and/or carrying such articles as dockets, 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.	<b>Up to 10#</b>	<b>Negligible</b>
	<b>Light:</b> 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.	<b>Up to 20#</b>	<b>Negligible</b> or constant push/pull of items of negligible weight
X	<b>Medium:</b> Ability to lift up to 50 pounds maximum with frequent lifting and/or carrying objects weighing up to 25 pounds.	<b>20-50#</b>	<b>10-25#</b>
	<b>Heavy:</b> Ability to lift up to 100 pounds maximum with frequent lifting and/or carrying objects weighing up to 50 pounds.	<b>50-100#</b>	<b>25-50#</b>
	<b>Very Heavy:</b> Ability to lift over 100 pounds with frequent lifting and/or carrying objects weighing over 50 pounds.	<b>Over 100#</b>	<b>Over 50#</b>
List any other physical requirements or bona fide occupational qualifications:			

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.