

STAFF TRAINING SCHEDULE TEMPLATE FOR SUCCESSFUL ONBOARDING

MONTH 1

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
WEEK 1	On-boarding, team introductions, shadow		Begin basic eye anatomy, EHR, and phones training / shadow		
	On-boarding, team introductions, shadow		Begin basic eye anatomy, EHR, and phones training / shadow		
	On-boarding, team introductions, shadow		Begin basic eye anatomy, EHR, and phones training / shadow		
WEEK 2	Continue with knowledge learning for pathology & insurance basics, shadowing front desk area (should be answering phones)				
	Continue with knowledge learning for pathology & insurance basics, shadowing front desk area (should be answering phones)				
	Continue with knowledge learning for pathology & insurance basics, shadowing front desk area (should be answering phones)				
WEEK 3	Begin skills training and knowledge checks for anatomy / pathology, shadow clinic area (should be scheduling appointments)				
	Begin skills training and knowledge checks for anatomy / pathology, shadow clinic area (should be scheduling appointments)				
	Begin skills training and knowledge checks for anatomy / pathology, shadow clinic area (should be scheduling appointments)				
WEEK 4	Knowledge checks for skills training, shadow optical area (should begin minor optical adjustments / repairs)				
	Knowledge checks for skills training, shadow optical area (should begin minor optical adjustments / repairs)				
	Knowledge checks for skills training, shadow optical area (should begin minor optical adjustments / repairs)				
KEY	FRONT DESK This would be a suggested path for anyone working reception, recall, or back office.		CLINIC This would be a suggested path for pre-test, technician, special testers, and scribes.		OPTICAL This would be a suggested path for anyone working in the dispensary at any capacity for dispensing, adjusting, repairing, or frame styling.



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MONTH 2

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

WEEK 5

Full scheduling capability and in-depth EHR training to learn all front desk capability with NO workarounds

Learning equipment scripting, equipment operations, and patient interactions

Begin in-depth optical training with P&P manual, lens removal, and mounting for all frame types

WEEK 6

Continue with statistical tracking, shopper conversion, recall, front desk P&P manual (shadowed BY trainer)

Continue with statistical tracking, equipment troubleshooting, run all equipment on entire team (shadowed BY trainer)

Continue with statistical tracking, lens / job check-in verification, measurements training, product knowledge

WEEK 7

Review phone triage training and mock call with doctor/trainer to ensure full compliance and understanding

Review lifestyle questions, proper exam protocol, mock exam on doctor / trainer

Shadow optical dispensing, selling, and troubleshooting. Mock optical conversations and troubleshooting patients

WEEK 8

Assign timeline for CPO/CBOC certification, doctor / trainer sign off on training – review with employee

Assign timeline for CPO certifications if applicable, doctor / trainer sign off on training – review with employee

Mock optical conversation & adjustments with doctor / trainer sign off on training – review with employee

KEY

FRONT DESK

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CLINIC

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OPTICAL

This would be a suggested path for anyone working in the dispensary at any capacity for dispensing, adjusting, repairing, or frame styling.

