

SAMPLE 5 DAY TRAINING  
ITINERARY

**Day 1:** \_\_\_\_\_

	7:50-8:00	Clock-In
	8:00-11:00	<p>Orientation</p> <ul style="list-style-type: none"> <li>• New Hire Documentation &amp; Identification verification</li> <li>• Training Binder including; Work Schedule, Company Phone Directory, and Login page</li> <li>• Read Employee Handbook</li> <li>• Review of Employee Handbook</li> <li>• Employee Handbook Acknowledgement of Receipt &amp; Comprehension</li> </ul> <p>HIPAA Training &amp; Certification</p> <p>OSC Program Assignment: <b>Focusing on HIPAA Compliance</b></p> <ul style="list-style-type: none"> <li>• Course 1 – An Introduction to HIPAA and Understanding Basic Terminology</li> <li>• Course 2 – HIPAA Rules and Regulations</li> <li>• Course 3 – Practice Safeguards and Notice of Privacy Practices</li> <li>• HIPAA Training Certificate of Completion</li> </ul> <p>Uniform and Name Tag Office Tour and Team Introductions</p>
	11:00-12:00	Test Login Credentials; Email, EHR, Paging System, Patient Communication System, etc.
	12:00-1:00	Lunch with Doctor or Office Manager
	1:00-2:00	Introduction to Optometry Basics; Terminology, Services, Glasses, Contacts, Appointment Abbreviations, Scheduling Guidelines, Exam Goals, Special Welcome, Verbiage, Fees, Scripting, Patient Care Cycle
	2:00-3:00	EHR Training Videos; Patient Demographics, Appointment Schedule
	3:00-4:00	OSC Program Assignment: <b>Excelling in 5 STAR Patient Care</b>
	4:00-5:00	Finish Incomplete Training Assignments, Review Training Materials. Check-In with supervisor for
	NOTES:	

Employee Initials: \_\_\_\_\_ Supervisor Initials: \_\_\_\_\_

*Insert breaks throughout, as required by your state labor laws.*



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**Day 2:** \_\_\_\_\_

	7:50-8:00	Clock-In
	8:00-9:00	Comprehensive Introductions to; EHR, Paging System, Patient Communication System, Williams Group OSC, Email, etc.
	9:00-10:00	Electronic Office Tour. Locate and review patient forms and important documents. General Office Equipment Tour; fax machine, telephone, scanner, etc.
	11:00-12:00	Patient Recall Process Family Member Conversion
	12:00-1:00	Lunch with Doctor or Office Manager
	1:00-2:00	OSC Program Assignment: <b>Unveiling the Mystery: Insurance &amp; Billing Best Practices</b> <ul style="list-style-type: none"> <li>• Course 1 – Unveiling the Mystery: Introduction</li> <li>• Course 2 – Insurance 101 – The Basics</li> </ul>
	2:00-3:00	Shadow Reception; <ul style="list-style-type: none"> <li>• Patient Intake</li> <li>• Patient Communication System</li> <li>• Roleplay Telephone Greeting and Appointment Scheduling</li> </ul>
	3:00-4:00	Shadow Patient Care Cycle with patient arriving at 3:00 pm
	4:00-5:00	Triage Training for Ocular Emergencies Finish Incomplete Training Assignments, Review Training Materials Check-In with supervisor for coaching/training itinerary
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**Day 3:** \_\_\_\_\_

	7:50-8:00	Clock-In
	8:00-10:00	Electronic Health Records (EHR) Training Videos: Exam Screens: Chief Complaint, Medication Hx, ROS, Family Hx, PQRS fields, Pre-Testing, Refraction, Contact Lens, Anterior, Posterior, Special Testing, etc. Electronic Health Records Navigation & Data Entry for Test Patient.
	10:00-11:00	Practice Management Training Videos: <ul style="list-style-type: none"> <li>• Patient Intake</li> <li>• Demographics</li> <li>• Ledger</li> <li>• Insurance</li> </ul>
	11:00-12:00	Study: Review Training Materials and Notes
	12:00-1:00	Lunch with department lead/ trainer _____
	1:00-3:00	OSC Program Assignment: <b>Patient Scheduling Optimization</b> <ul style="list-style-type: none"> <li>• Course 1 – Phone Triage</li> <li>• Course 2 – Scheduling Basics</li> </ul> Finish incomplete OSC Program Assignments
	3:00-4:00	Shadow Patient Care Cycle with patient arriving at 3:00 p.m.
	4:00-5:00	Shadow Optical <ul style="list-style-type: none"> <li>• Triage Training for Optical Emergencies</li> <li>• Adjust &amp; Polish</li> <li>• Dispensing Presentation</li> </ul> Review Training Materials Check-In with supervisor
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**Day 4:** \_\_\_\_\_

	7:50-8:00	Clock-In
	8:00-9:00	Shadow department opening procedures. Print & review the schedule.
	9:00-10:00	Shadow department and technical skills/instrumentation/scripting. Be an active participant / hands-on training.
	10:00-11:00	Become a Patient. Start by walking in the front door/special welcome. Reflect on your Patient Experience with supervisor.
	11:00-12:00	Complete incomplete EHR and/or Williams Group OSC Training.
	12:00-1:00	Lunch with team members: _____.
	1:00-2:30	OSCL Program Assignment: <b>Frame &amp; Lens Basics</b> <ul style="list-style-type: none"> <li>• Course 1 – Basic Types of Lenses</li> <li>• Course 2 – Specialty Types of Lenses</li> <li>• Course 3 – Lens Materials &amp; Terminology</li> <li>• Course 4 – Frame Anatomy &amp; Types of Frames</li> </ul>
	2:30-3:00	Telephone Training Review: <ul style="list-style-type: none"> <li>• Roleplay Patient Shopper Conversion, use training card</li> <li>• Answer live calls under supervision</li> </ul>
	3:00-4:00	Shadow Patient Care Cycle with patient arriving at 3:00 p.m.
	4:00-5:00	Triage Training for Ledger & Billing Inquiries Shadow department closing procedures Check-In with supervisor
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**Day 5:** \_\_\_\_\_

	7:50-8:00	Clock-In
	8:00-9:00	Participate in opening procedures and Checklists. Print & review the schedule utilizing EHR. Review Verbiage, Scripting, and Fees
	9:00-12:00	Introduction to instrumentation & terminology: <ul style="list-style-type: none"> <li>• Auto-Refractor + Keratometer</li> <li>• Auto-Lensometer</li> <li>• Lensometer</li> <li>• Fundus Camera</li> <li>• Optos</li> <li>• Phoropter</li> <li>• Goldman Tonometer</li> <li>• iCare, NCT, Tonopen</li> <li>• OCT, HRT</li> <li>• Humphrey's Visual Field</li> <li>• AdadptDX.</li> </ul>
	12:00-1:00	Lunch with Supervisor
	1:00-2:00	OSCL Program Assignment: <b>Preliminary Testing Part 1: Common Procedures and Instrumentation</b> <ul style="list-style-type: none"> <li>• Course 1 – Preliminary Testing Program Prerequisite</li> <li>• Course 2 – Preliminary Testing Part 1 Introduction</li> <li>• Course 3 – Verifying Demographics</li> </ul> Introduction to Contact Lens Regulations, Modalities, Guaranteed Contact Lens Success Program, Vision Benefits, Rebates, Capture Rate, Ordering and Documentation Processes
	2:00-3:00	EHR Training Videos: <ul style="list-style-type: none"> <li>• Inputting Spectacle &amp; Contact Lens Orders</li> </ul>
	3:00-4:00	Shadow Patient Care Cycle with patient arriving at 3:00 p.m.
	4:00-5:00	Complete any incomplete training videos Shadow Adjust & Dispense processes. Participate in closing procedures and checklists.
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