

Enrolled



5 STAR Patient Reception – Frontline Efficiencies

Continue studying

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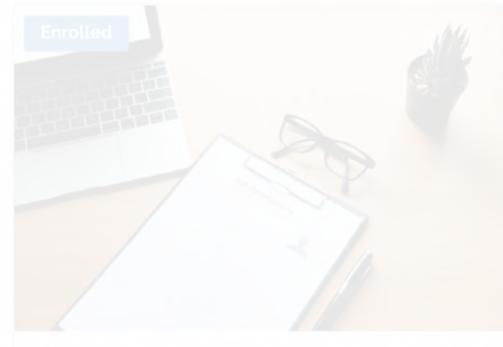


Are You Paying More Than You Are Receiving To See Your Vision Plan Patients?

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Billing Practices

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Building Patient Schedules

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Focusing on HIPAA Compliance

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Last Modified 12/15/2022

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Frame and Lens Basics

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OPTOMETRIC SUCCESS CENTER

User Guide

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OVERVIEW

PURPOSE OF GUIDE



The purpose of this guide is to provide practice leaders and learners with a complete understanding of how the Optometric Success Center Library functions, including:

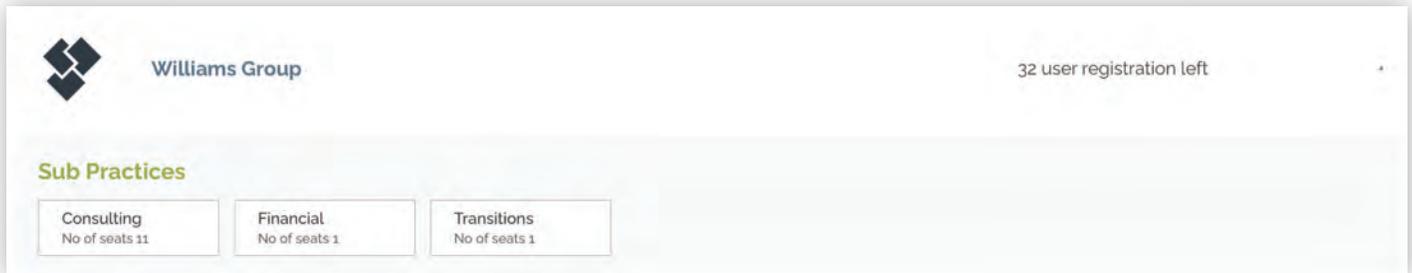
- PROGRAMS & COURSES
- QUIZZES & CERTIFICATES
- LEADERS & LEARNERS
- PRACTICES
- SUB-PRACTICES
- INSIGHTS

This guide should assist you with enrolling your leaders and learners into your practice. You'll learn about our programs and courses that can be assigned to your entire team or an individual learner. Take a deep dive into practice insights to see how each learner in your practice is currently doing with their learning.

Talk with your coach about how to best implement the examples shown in this guide.

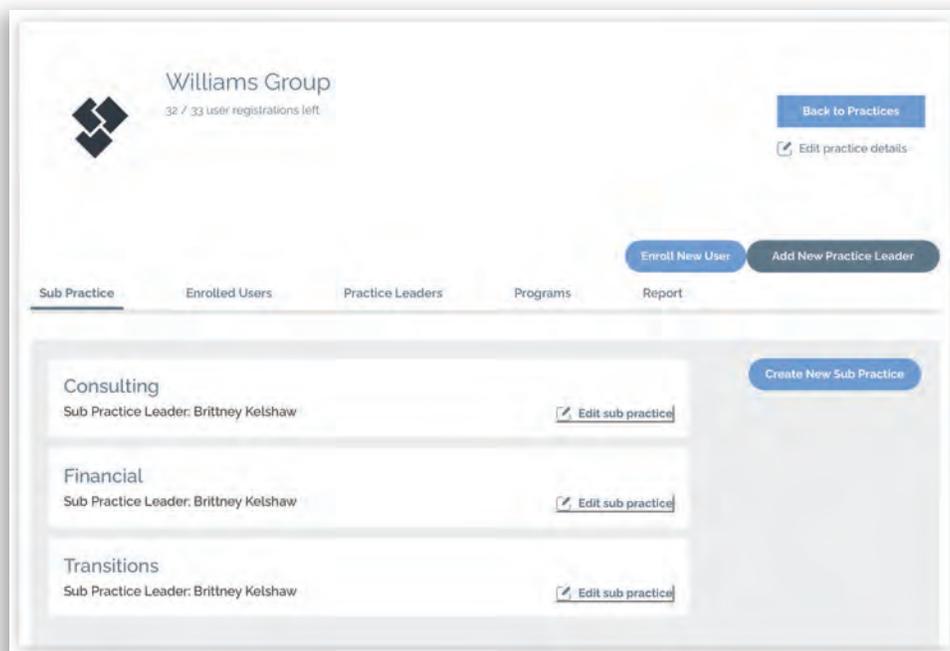
MULTIPLE PRACTICE LOCATIONS

If you have multiple practice locations, you will enter each location as it's own sub practice.



CREATE A NEW SUB-PRACTICE

- 1 Click on Practice Dashboard
- 2 Select your practice
- 3 Click on Create New Sub Practice
- 4 Enter your location name, assign the number of employees (seats), assign yourself as a practice leader, and select the programs you wish to assign to that practice location
- 5 Click submit



HOW TO ENROLL LEARNERS & PRACTICE LEADERS

Under the Practice Dashboard, you'll also be able to enroll your team members as users and managers/owners as leaders.

*PLEASE NOTE

This cannot be a shared email address, as this is how their learning is tracked. Click submit when form is filled out. If you're ready to upload multiple learners, you can select Upload via CSV. Choose your CSV file and click upload.

- 1 Click on Enroll New User
- 2 Enter learner's first and last name
- 3 Add user's email address

NEW USERS

Enroll New Users

+ Add Users • Upload via CSV

FIRST NAME LAST NAME

EMAIL  Remove User

+ Add more users

Cancel

Submit

NEW PRACTICE LEADERS

Add New Practice Leaders

+ Add Practice Leaders • Upload via CSV

FIRST NAME LAST NAME

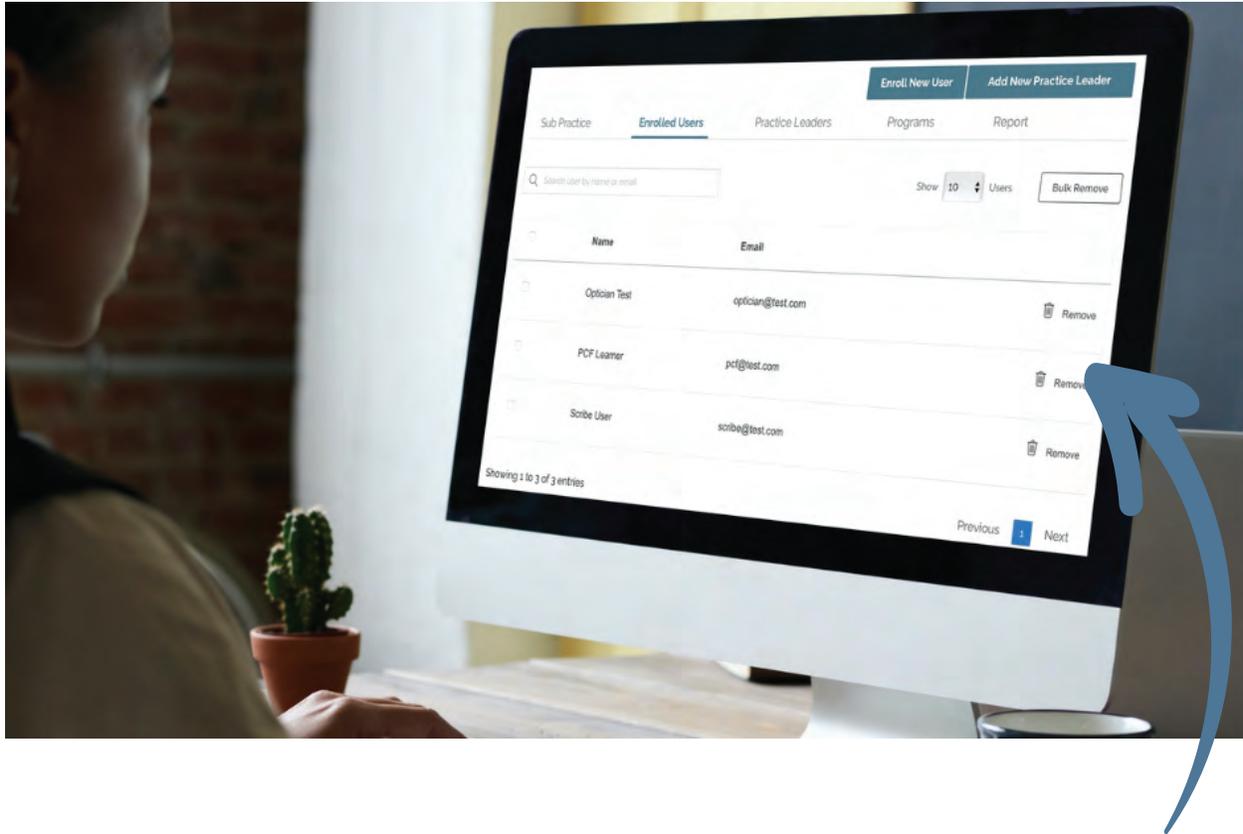
EMAIL  Remove Practice Leader

+ Add more Practice Leaders

Submit

To assign a practice leader to a sub practice, click on the sub practice they are the leader of. Then click on add new sub practice leader. Click submit to save.

REMOVING A USER



To delete a user from your practice, go to your Practice Dashboard and click Enrolled Users. Click Remove next to the learner's name you would like to delete. To delete a user from a sub practice, click Sub Practice, then Edit Sub Practice on the one you'd like to delete a user from. Check the box of the user's name you would like to remove. Be sure to hit submit to save your changes. Keep in mind, if there is a user enrolled in a practice AND a sub practice, you must delete them from both. Deleting them from one will not delete them from everything.

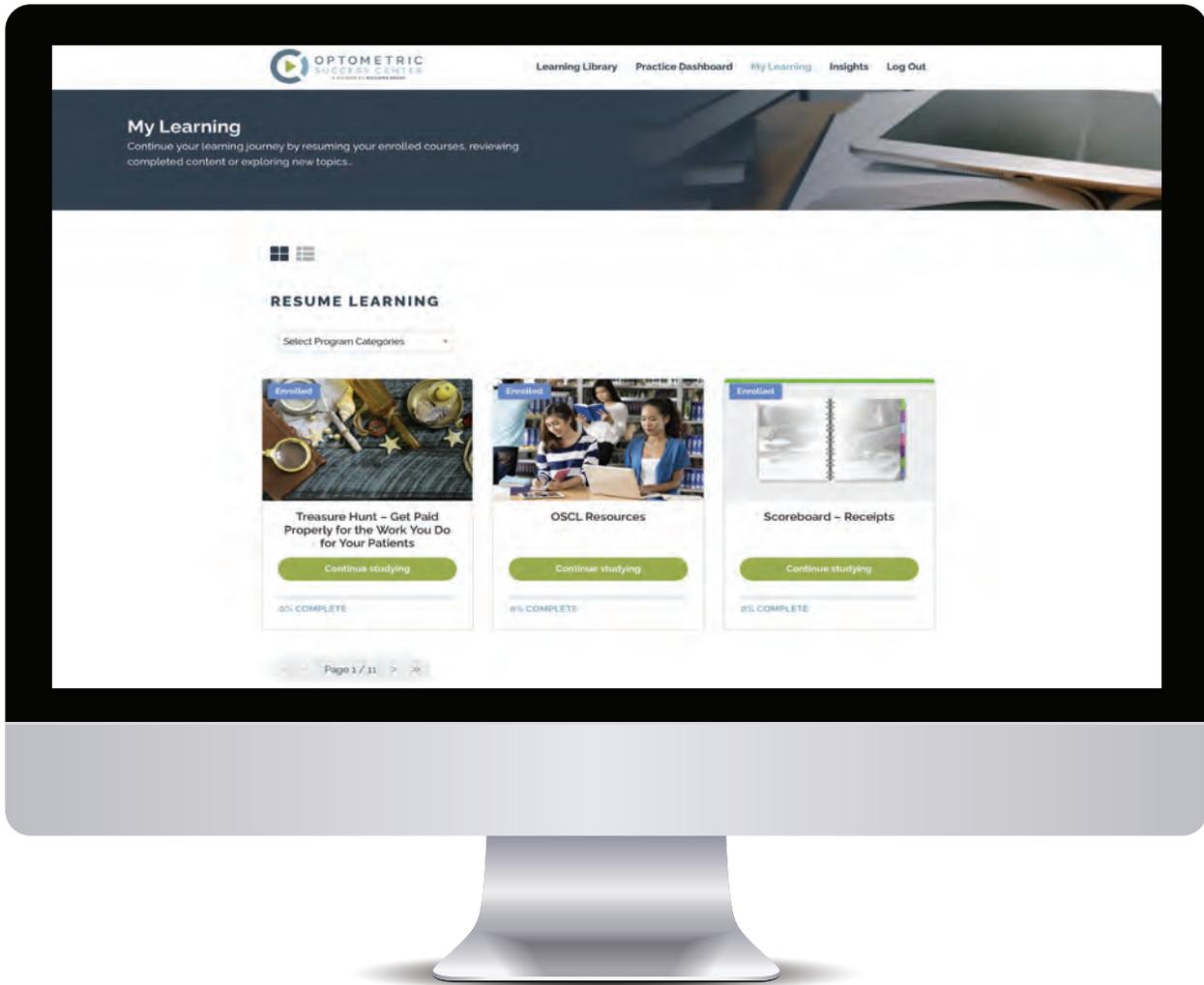
ASSIGNING DUE DATES TO YOUR TEAM



On the Practice Dashboard page, under Programs, you'll see all of the programs assigned to your practice. You can assign due dates to programs here. Click the Due Date box and select the date and time you'd like your team to complete the program by. If you don't want to set a due date, leave this portion empty.

BEGIN YOUR LEARNING

From the My Learning page, each user will be able to see the courses assigned to them.



- 1 Resume Learning - pick up where you left off
- 2 Explore Enrolled - view programs you're enrolled in
- 3 Review Completed - see the programs you finished

PROGRAM OVERVIEW

The Program Overview page provides you with a brief description of what the program entails, as well as a list of its content.

The screenshot displays the 'Optometric Success Center' interface. At the top, there is a navigation menu with links for 'Learning Library', 'Practice Dashboard', 'My Learning', 'Insights', and 'Log Out'. Below the navigation, the page title is 'How to Use Our Training App'. A progress bar indicates '33% COMPLETE' with the last activity on 'December 22, 2021 4:38 pm' and a status of 'IN PROGRESS'. The main content area features a section titled 'Overview' with a description: 'In this course, you will learn to navigate and use our Training application.' Below this is a 'Program Content' section listing three items: 'What is the Optometric Success Center Library?' (unchecked), 'Overview' (unchecked), and 'Reset Password' (checked). The footer includes the copyright notice '© 2021 Optometric Success Center' and contact information: 'Contact Us: osc@thewilliamsway.com 800.676.9076'.

Courses must be taken from beginning to end.

NAVIGATING THE PROGRAMS

The screenshot shows a training program interface. On the left is a navigation menu with a dark header '5 STAR Patient Reception - Frontline Efficiencies'. The menu items include: '5 STAR Patient Reception - Frontline Efficiencies Introduction' (selected), '3 Topics', 'Frontline Efficiencies Introduction', 'Frontline Efficiencies Objectives', 'How Important is Your Role? Let's Define!', '5 Topics | 1 Quiz', 'Your STAR Impact', '8 Topics | 1 Quiz', 'Planning and Preparing For the Day', '5 Topics', 'Patient Production Cycle', '4 Topics', 'Time Management', '7 Topics', 'Team Huddles', '4 Topics', and 'Must Haves: Tools and Technology', '6 Topics'. The main content area is titled 'Frontline Efficiencies Introduction' and has a breadcrumb trail: '5 STAR Patient Reception - Frontline Efficiencies < 5 STAR Patient Reception - Frontline Efficiencies Introduction < Frontline Efficiencies Introduction'. A black 'IN PROGRESS' button is in the top right. The video player shows a video with the word 'EPIC' repeated four times in colored bars (green, purple, blue, pink). Below the video is a progress bar at 02:09 and a play button. The video transcript reads: 'Hello and welcome! Today's topic is 5 STAR patient reception and key frontline efficiencies that will help you positively impact your role as patient reception coordinator at the front desk as well as your role in providing excellent patient care and protecting the financial success of your practice. I'd like to start with a helpful mantra to keep in mind and that is 5 STAR. So, what is it? Well, when you do those Google reviews, what do you look for? You look for those 5 golden stars, right? Yes! And also STAR: what does that mean? Well, I like to say it stands for satisfying, timely, attainable, results. So, thus we have 5 STAR patient care or in this case, 5 STAR patient reception.'

- 1 Program progress
- 2 Training video
- 3 Video transcript
- 4 Downloadable tools and resources

Once you've completed that portion, click next course. By clicking next course, you'll advance your progress within that program and course. Once you've reached the final course, you'll see a done button. Click this to complete your training on this program!

INSIGHTS DASHBOARD

As a practice leader, you have the ability to look at Insights.

1

INSIGHT DASHBOARD

The Reporting Dashboard displays a grid of program cards. Each card shows the program title, the number of learners enrolled, and the number of learners completed. The programs listed are:

- 5 STAR PATIENT RECEPTION – FRONTLINE EFFICIENCIES: 3 learners enrolled, 0 learners completed
- ARE YOU PAYING MORE THAN YOU ARE RECEIVING TO SEE YOUR VISION PLAN PATIENTS?: 3 learners enrolled, 0 learners completed
- BEST PRACTICES FOR WRITING COMPELLING JOB DESCRIPTIONS: 3 learners enrolled, 0 learners completed
- BUILDING A PATIENT SCHEDULE TEMPLATE: 3 learners enrolled, 0 learners completed
- CLINICAL WORKUP FOR EMERGENCY, URGENT, AND PRIORITY OFFICE VISITS: 3 learners enrolled, 0 learners completed
- CONTACT LENSES PART 1: THE BASICS: 3 learners enrolled, 0 learners completed
- CONTACT LENSES PART 2: OPERATIONS MANAGEMENT: 3 learners enrolled, 0 learners completed
- COVID-19 RESOURCES: 3 learners enrolled, 0 learners completed
- DISC ASSESSMENT UTILIZATION: 3 learners enrolled, 0 learners completed
- EBITDA AND YOUR PRACTICE FINANCIALS: 3 learners enrolled, 0 learners completed
- EXCELLING IN 5 STAR PATIENT CARE: 3 learners enrolled, 0 learners completed

This is a quick overview of all the programs assigned to your practice. You can see how many learners are assigned to that program and how many of those learners have completed that program.



2

LEARNERS DASHBOARD

The Learners Dashboard shows a table of learner data for the '5 STAR Patient Reception - F' program. The table includes columns for Name, Program Completion, Final Quiz Score, Average Course Quiz score, View Learner Report, Last Activity, Hours Learning, Date Complete, and Due Date.

Name	Program Completion	Final Quiz Score	Average Course Quiz score	View Learner Report	Last Activity	Hours Learning	Date Complete	Due Date
Optician Test	0%	N/A	N/A		N/A	Not started	N/A	July 27, 2022 3:42 PM CDT
PCF Learner	0%	N/A	N/A		N/A	Not started	N/A	July 27, 2022 3:42 PM CDT

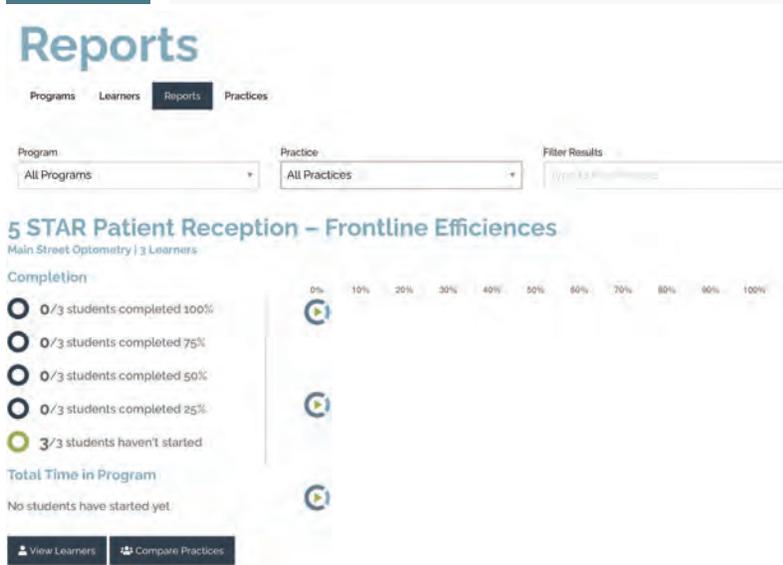
This dashboard is for each program, by each learner. You can select by program or by completion date.



INSIGHTS REPORTING

3

REPORTS DASHBOARD



This view provides a quick overview of the progress by each learner, based on each program.



4

PRACTICE COMPARISON

The screenshot shows the 'Practices' comparison table with the following data:

Practice	Number of Learners	Program Completion	Average Course Quiz Score	Average Final Quiz Score	View Reports	View Learners
Consulting	3	0%	N/A	N/A	View	View
Financial	0	N/A	N/A	N/A	View	View
Williams Group	1	0%	N/A	N/A	View	View
Average	1	0%	N/A	N/A		

This view compares all of your practices if you have multiple locations



INSIGHTS REPORTING

5

LEARNER REPORT

Optician Test

Programs Learners Reports Practices

5 STAR Patient Reception – Frontline Efficiencies

Main Street Optometry

Progress & Performance

Program completion:	0%
Final quiz score:	N/A
Avg. course quiz score:	N/A
Latest activity:	N/A
Due date:	07/27/22
Time Spent in Program:	Not started

Take a deep dive into your individual learner with this report.



6

ASSIGN LEARNER DUE DATES

Learners

Programs Learners Reports Practices

Program: 5 STAR Patient Reception – F Practice: All Practices Completion Date Range: Search:

Name	Program Completion	Final Quiz Score	Average Course Quiz score	View Learner Report	Last Activity	Hours Learning	Date Complete	Due Date
Optician Test	0%	N/A	N/A		N/A	Not started	N/A	July 27, 2022 3:42 pm CDT
PCF Learner	0%	N/A	N/A		N/A	Not started	N/A	July 27, 2022 2:41 pm CDT

Each learner can have a different due date. This due date overrides the practice due date. Click on the due date on the line of each user you'd like to assign a specific due date to.



SIGNING UP FOR A LUNCH & LEARN

In the monthly Optometric Success Center newsletter, you will be able to sign up for the Lunch & Learn's available. Click on the OSC topic you'd like to attend the Lunch & Learn for. There will be one Lunch & Learn per month, per topic. You may sign up for any session, but keep in mind, its best to complete the programs regarding that topic so you are prepared with any questions that you may have.

When you join a lunch & learn, you'll receive a confirmation email with instructions to join the conference line. You'll need to ensure you have adequate internet access as well as a microphone to join the conversation. These steps will help you with downloading the app and joining the meeting.



Our Lunch and Learn's review key concepts and answer questions you may have after taking courses within our online learning library. Below is a list of categories available! Click the category to register.

You'll want to sign up as soon as possible; virtual seating is limited!



Clickable links!



ATTENDING A LUNCH & LEARN

Day Before Lunch & Learn:

Be sure to prepare by getting GoToWebinar set up on the device you'll be using!

New to GoToWebinar? Get the app now and be ready when your first meeting starts: <https://dashboard.gotowebinar.com/>

Day of Meeting:

Make sure you are situated in a quiet place at least 5 minutes beforehand, with the ability to focus fully for the 30 minute Lunch & Learn. We highly recommend that you close all unrelated browser windows on your device and set your phone/apps to “Do Not Disturb” so that you can get the full value out of this time you've invested in learning.

Click the Lunch & Learn link in the GoToWebinar app, email invitation link, or the link within your OSC live session calendar to being. Join a couple minutes early.

Be ready to respond to any quizzes, questions, and prompts from your trainer. This will be a fully interactive session, requiring your engagement to receive the full value.

As an attendee, you will be able to see the presenter's screen. You will also have access to see any other attendees who have joined the meeting. You will not be required to share video during live sessions.

Chat: private messages or broadcast messages to all panelists

Q&A: attendees send questions to organizers with the option for private responses or to entire audience

Poll: attendees send answers to organizers during a polling question

Programs + Courses

Our online learning library is unlike any other. With our proprietary coursework, we can help train your team in areas that include: General Office, Front Desk, Insurance & Billing, Clinic Administration, Medical Dispensary Management, Lenses and Contact Lens Management. Our customized courses also include the accountability from our team of Executive Management Coaches & Trainers to allow your team to prove comprehension of different areas of knowledge and skill necessary to be successful in your practice.

Thank you!

FOR CHOOSING THE OPTOMETRIC SUCCESS CENTER

If you have comments, questions, or concerns, please reach out to your **Executive Management Coach** or the **OSC team** via email at osc@thewilliamsway.com.