



The California Paraoptometric Section promotes continuing educational opportunities for optometric staff and offers this tool to develop an in-service training series in the office.



Developing an In-Service Training Program in Your Practice



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Introduction

A large component of any paraoptometric's development is gained through on-the-job training. For any office or practice, staff meetings are important in building teamwork and making sure every staff member understands the flow of operations and how they contribute to the practice. Similarly, offering in-service training provides optometric staff with an additional opportunity to learn from each other, or to understand the business aspect of the practice. It promotes teamwork, leadership, and ownership among staff in their respective roles in the practice.

Before using these guidelines or adapting them to your needs, it is advisable to discover your areas of greatest need. A regularly scheduled office meeting that includes staff, management, doctors and owners, is the best place to find out what improvements can benefit operations. CPS hopes that these Guidelines and the Lesson Plan Outline form will be helpful in promoting education, professionalism and fellowship in your practice.

Developing an In-Service Training Program

Participation

The entire office needs to make a group decision and commitment to establish an in-office education series. Allow the person who is the "expert" in the office be the presenter in their topic area. This is not meant to be a labor-intensive research effort, but something fun, simple, and educational.

Assign Roles for Each Training Session:

Presenter: Ideally, each staff person should have an opportunity to present a topic, or two individuals may want to "buddy" up. If there are no initial volunteers, then the manager should assign dates, topics and staff.

Scheduler: keeps the calendar of the training dates and sends reminders to all the participants and presenters

Facilitator/Moderator: Facilitates flow of discussion; ensures attendees do not speak out of turn

Time for an In-Service Training

Like scheduled staff meetings, the in-service training should be scheduled for an uninterrupted time, whether it is before the practice opens, after it closes, or during a lunch hour with the office closed.

Develop an in-service training schedule

- Decide frequency of in-service training: monthly, quarterly, weekly
- Set/post schedule
- Define time period for training session
- Schedule topics with specific staff people

Set aside approximately 20-30 minutes for the presentation itself and allow for 10-15 minutes for questions, answers, and discussion. To help support such a program, it would be helpful for the office manager or optometrist to consider allocating a defined amount of work time to use in preparing for the presentation (example: 2-3 hours per week). This would be helpful in providing time for the presenter to read through their subject matter, develop their outline or search for materials.





Education

Professionalism

Fellowship

The mission of the California Paraoptometric Section is to promote the paraoptometric profession throughout the state by providing education, communication, fellowship, and community service.

Select Topics

Identify a list topics based on your frequency of training. These topics may arise from specific needs or issues experienced in the office, or as follow-up from lectures that paraoptometrics have attended. CPS recommends beginning with some fundamental areas such as phone triage, history-taking or frame-adjusting.

Some examples might include:

Technical:

1. Phone triage
2. Frame adjusting
3. Basic anatomy
4. Contact lens training
5. Customer service

Practice Management:

1. Team building
2. Insurance explanation
3. HIPAA
4. Cross-training
5. Totals (tracking practice growth)

The in-service format can be adapted to a chapter review of a text book, or used to help paraoptometrics review for any certification exams (e.g. AOA paraoptometric certification or ABO/NCLE certification).

Role-playing and hands-on demonstrations are other ways to adapt the format for the in-service training.

Develop an Outline

A guideline of questions would be helpful for the presenter to organize their search for information. Identify 3-5 main questions to address. Based on the topic or issue, some questions might be:

- Why is this topic important?
- How does this topic/issue affect staff?
- Define the condition.
- What are the challenges of this condition?
- How is this issue applicable to the practice?
- What problem/challenge does this topic address in the practice?
- What recommendations from this topic can best be applied to the practice?

Find Background Materials

Identify sources of information for your research. Some suggestions to begin looking:

- CPS Resource Library: www.cpsection.org
- International Library, Archives and Museum of Optometry: www.aoa.org
- National Eye Institute: www.nei.nih.gov
- Public Library
- Internet Google Search
- Notes from lectures or conferences you have attended
- Your vendor companies may also be a resource for information

Presentation Tools

In addition to providing a verbal presentation or discussion about the topic, the presenter may want to consider audio-visual aids such as power point slides, diagrams, hand-outs for attendees, video, or hands-on demonstrations.

Lesson Plan Worksheet

The attached Lesson Plan Worksheet was designed by CPS as tool to help the organizer, or presenter walk through the steps in preparing for each in-service training session. Feel free to make copies for each presenter, or download another copy from the CPS web site at www.cpsection.org.

Adapting the In-Service Training Program and Lesson Plan Worksheet

Feel free to use the guidelines expressed here, and the Lesson Plan Worksheet, as tools to adapt to your own needs. Here are other examples of how the program can be structured:

- One practice had an experienced office manager that organized a six-week review session for the AOA Paraoptometric Certification exam. Each session reviewed a chapter from the AOA text book.
- While one staff member presents on a topic, a manager formulated a short quiz to apply the discussion points to daily situations.
- In-service training sessions can help supplement a practice's cross-training program, or if staff rotate roles.

Developing an In-Service Training Program

LESSON PLAN WORKSHEET

Assign roles:

Presenter(s): _____

Facilitator: _____

Scheduler: (someone to post the training date/time, and send reminders to staff) _____

Attendees: Identify specific group of people who will participate in the training:

List names:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Schedule Training Session: Define an uninterrupted time period for the training session.

Date: _____

Time (start): _____

Time (end): _____

Remember to allocate time for questions and answers

Meeting location: _____

Select Topic: Choose a specific topic, issue, clinical condition, etc., for the in-service training.

Topic/Title: _____

Develop an Outline: Identify main questions to be addressed: Example: *Why is this topic important?*

1. _____
2. _____
3. _____
4. _____
5. _____

Research: Find background materials to address the topic/issue.

List resources to begin your search for information:

1. CPS Resource Library. Visit www.cpsection.org
2. _____
3. _____
4. _____
5. _____

Presentation Tools: In addition to your verbal presentation/discussion, will you use other audio/visual aids?

- Power point slides Diagram
- Hands-on demonstration Video
- Handouts None
- Other: _____

Record the resources, books, texts you used to actually gather your information. You can use it to refer other interested staff to for more information.

1. _____
2. _____
3. _____
4. _____

Facilitator Re-Cap: Conduct a brief quiz or test at the end of the presentation.

- Multiple choice Fill-in the blank

