

Job Description

Job Title:	Optical Services Account Manager
Department:	Optical Services, Waterloo Eye Institute (WEI)
Reports To:	Optical Services Manager, Optical Services Financial Manager, WEI
Jobs Reporting:	None
Salary Grade:	USG 5
Effective Date:	November 2020

Primary Purpose

The Optical Services Account Manager dually reports to the Optical Services Manager and to the Financial Manager, WEI. The OS Account manager provides administrative support to the both managers in all areas pertaining to the reconciliation of statements for the Optical Services regular and consignment accounts and the tracking of inventory.

Key Accountabilities

Order Reconciliation Management

- Manage documentation to receive and reconcile frames and lens orders to orders placed by Opticians
- Follow up with vendors on any missing documentation or missing product to ensure we receive what we order and that we have the correct paperwork to make timely payments.
- Match the invoices to monthly statements for regular orders and contact lenses
- Ensure timely payment of invoices and continued good standing with our vendors
- Monitor the Optical Services generic email account and respond to inquiries as required

Relationship Management

- Manage Optical Services' relationships with frame vendors with particular consideration to our consignment vendors who are our strategic partners
- Responsible for meeting vendors, reviewing orders and tracking sales by product to ensure ideal product mix
- Manage vendor list and provide ad hoc reports as requested – frequency, dollar values, etc.

Inventory Management

- Responsible for the documentation of inventory control in Optical Services. Track bestselling frames, high and low turnover products, document occurrences of shrink etc.
- Provide training to the interns on inventory management processes and procedures
- Do regular visual checks of inventory as well as periodic formal tracking and reconciliation
- Ensure quality by inspecting goods received for shortages, damage, etc. Resolve problems when necessary
- Participate in the annual inventory count along with any quarterly inventory reviews

EMR System Documentation

- Ensure that inventory is managed seamlessly with VisualEyes, our electronic medical records system. Items received are entered into the system and returned goods are removed
- Update inventory offerings in the system as needed
- Ensure consignment inventory and regular inventory are clearly defined and tracked in VE

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**All employees of the University are expected to follow University and departmental health and safety policy, procedures and work practices at all times. Employees are also responsible for the completion of all health and safety training, as assigned. Employees with staff supervision and/or management responsibilities will ensure that assigned staff abide by the above, and actively identify, assess and correct health and safety hazards, as required.*

Required Qualifications

<p>Education</p> <ul style="list-style-type: none"> • College diploma or university degree, preferably in an accounting discipline, or equivalent education and experience
<p>Experience</p> <ul style="list-style-type: none"> • 2+ years of related financial experience with a good understanding of accounting principles and practices, preferably in an academic environment • Prior experience working in an optical dispensary environment an asset • Ability to manage multiple projects and responsibilities and to prioritize is critical • Previous experience with in an electronic medical record system is required
<p>Knowledge/Skills/Abilities</p> <ul style="list-style-type: none"> • Solid understanding of Microsoft office required (with an emphasis on Excel) • Excellent knowledge and understanding of an Electronic Medical Record System (EMR), preferably Visual Eyes • Ability to communicate, both orally and in a written format, information at all levels of the organization is essential

Nature and Scope

- **Contacts:** The incumbent will need to work closely with the Optical Services Account Manager and the Opticians to ensure the proper stocking and ordering of frames and lenses. In addition, the incumbent will also work with contacts in UW Finance and sales representatives from various optical companies.
- **Level of Responsibility:** The incumbent is responsible to provide administrative support to the Manager of Optical Services and the Financial Manager in all areas pertaining to the reconciliation of statements for Optical Services.
- **Decision-Making Authority:** The incumbent must be able to work independently with minimal supervision and/or direction from either the Financial Manager or the Optical Services Manager
- **Physical and Sensory Demands:** Minimal demands typical of a position operating within an office environment.
- **Working Environment:** The Waterloo Eye Institute (main) is located on the north campus; the Health Sciences Optometry Clinic (satellite) is located at King and Victoria St., Kitchener. The Clinic is open Monday to Saturday from 7:30 a.m. until 9:00 p.m. Hours are subject to change, and employees are expected to accept work assignments within the timeframes when the clinic is operating. Normally rotations will be organized, but from time to time it may be necessary for clinic management to assign alternate hours. Specific duties of the position may change according to clinic needs.