Job Description

Job Title:	Optometric Assistant
Department:	Waterloo Eye Institute (WEI)
Reports To:	Clinic Head, Specialty Clinic Clinic Operations Manager, Waterloo Eye Institute
Jobs Reporting:	None
Salary Grade:	USG 5
Effective Date:	November 2020

Primary Purpose

The Optometric Assistant is a dynamic role central to enhancing patient care and clinic efficiency. Responsibilities span from patient reception and scheduling to ophthalmic testing, as per the scope of practice of the Canadian Certified Optometric Assistant (CCOA) certification. The role also encompasses managing the dispensary, assisting with frame and lens selection, and overseeing adjustments and repairs. Ideal for a candidate with strong organizational and customer service skills, this position offers a unique opportunity to contribute significantly to patient care while supporting the clinic's operational, educational and revenue goals in a stimulating professional environment.

Key Accountabilities

Patient Reception

- Handles incoming telephone calls to the Waterloo Eye Institute (WEI) and orients patients to the WEI's mandate, services and processes
- Prepares and manages the patient schedule in VisualEyes (EMR system), and schedules appointments in accordance with optometrist availability and appointment criteria, including assigning Optometrists and student interns to clinic rooms
- Confirms patient appointments and notifies patients of any fees associated with the services provided; attempts to fill any openings due to cancellations to optimize WEI revenue
- Verifies eligibility for OHIP and third-party coverage for all scheduled patients
- Greets patients in the WEI and notifies doctors and interns of patient arrival; routes patients through the WEI via the EMR system to optimize patient flow
- Follows up with patients who do not show for their appointment to initiate another appointment booking to optimize patient care and clinic revenue
- Maintains a computerized recall system and contacts patients to book a recall appointment

Patient/Administrative Records Maintenance

- Processes patient records in accordance with OHIP and 3rd party billing requirements, consistent with clinic policies and procedures, including checking any follow up appointments or invoicing/billing concerns and notifying the appropriate person to address the issue
- Ensures patient records are up-to-date by verifying patient personal information at time of appointment booking or at check-in/arrival to appointment

- Maintains and records patient statistics and clinician attendance records
- Provides administrative support as required
- Prepares and distributes student evaluations in the electronic student evaluation system or paper evaluation forms
- Solicits and records patient consent for teaching and research in support of the School's teaching and research mandate

Payments/Supplies & Inventory Maintenance

- Receives payments in accordance with the financial policies and procedures of the clinic and the university, including invoicing and receiving payment for third party billings
- Undertakes daily reconciliation of day-end transactions (cash/credit/debit and parking vouchers)
- Orders, monitors and maintains supplies, products or equipment required for use in the Clinic, and replenishes Clinic exam room supplies as required
- Assists with the ordering and/or dispensing of spectacle and/or contact lenses and other products required to provide appropriate care for patients
- Assists with the annual fiscal year-end WEI inventory count

Optical/Dispensary Support

- Provides support for optical purchases, fittings, and adjustments
- Discusses lens and frame selection with patients
- Verifies all measurements for glasses and contact lens orders
- Provides follow up with patients regarding the fit and satisfaction of their new purchases. Trouble shoot issues with new prescription orders when required
- Maintains the optical services displays, liaise with the main campus to ensure that we are offering and up-to-date selection of frames and lenses
- Instructs patients on contact lens insertion and removal

Optometric Testing

- Uses ophthalmic diagnostic equipment, including optical coherence tomography, fundus cameras, and visual field analyzers to ensure precise and high-quality image capture
- Supports and assists students and clinicians in capturing and uploading ophthalmic images into the EMR system.
- Maintains backup of the images regularly.
- Identifies and resolves technical issues wit imaging devices and coordinates with technical support for complex repairs or maintenance.
- Follows defined quality control measures for imaging accuracy and maintenance.
- Engages with patients to ensure their comfort and safety during imaging procedures by providing clear instructions and addressing any concerns.

Clinic Staff, Optometrist and Student Support

- Provides support to all supervisors and students working in the WEI, including assigning patients and clinic rooms

- Delivers the administrative component of the orientation sessions at the beginning of each new student rotations
- Assists with training new employees and work-study students on the daily job requirements, the EMR system, and the clinic policies and procedures
- Assists with the organization of special activities in the clinic such as lunch and learn sessions
- Performs varied administrative tasks and special projects to promote smooth operations, and in support of the clinic's dual mandate - to provide excellent patient care and to educate optometry student clinical interns

Patient Safety & Quality Assurance

- Triages emergency calls during regular business hours, notifies the on-call OD of emergency calls and books appointments as per optometrist's direction
- Maintains effective patient recall and follow-up, including monitoring patient progress to ensure timely scheduling of appointments to ensure patient safety, consistent with standards for optometric care and as directed by the supervising optometrist
- Assists in the review of patient records to ensure that all required data fields in the EMR are completed, ensuring the integrity of the patient record (in support of patient care and billing)
- Undertakes "Routine Practices" for infection prevention and control based on provincial Public Health standards
- May serve as back-up resource for medical reprocessing (sterilization) of optometric instruments (using autoclave), consistent with the WEI's Standard Operating Procedure and provincial requirements
- Assists in contacting patients with scheduled appointments to inform them of a clinic closure due to inclement weather or emergency situation

**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

Education

- Certified Optometric Assistant diploma (or equivalent designation and/or experience)

Experience

- Minimum of 2 years of experience working in a health care environment, preferably in an optometric practice setting is recommended
- Experience with ophthalmic equipment, ocular/medical terminology is required
- Experience in a patient/customer facing role
- Experience working with cash/receiving payments

Knowledge/Skills/Abilities

- Working knowledge of an electronic medical records (EMR) system, preferably Visual-Eyes (VE) or another system tailored to optometry

- Working knowledge of OHIP regulations specific to optometry preferred
- Working knowledge of Privacy legislation
- Basic knowledge of infection prevention and control practices
- Demonstrated skill in the use of optometric testing equipment
- Well-developed oral and written communication skills exercising tact and diplomacy
- Well-developed problem solving and conflict resolution skills to deliver exceptional patient/customer service and experience
- Ability to work independently and collaboratively as part of a team
- Ability to accommodate different assignments, working schedules and specialty clinics
- Proficiency in Microsoft Office (Outlook, Word)

Nature and Scope

- **Contacts:** Works with patients, optometry and work-study students and clinic personnel (clinicians and staff); also communicates with personnel from ophthalmology and community optometric practices, as well as with a variety of 3rd party agencies
- **Level of Responsibility:** Patient orientation focus; provides functional direction to optometry and work-study students and clinicians with all matters related to patient appointments (scheduled and emergencies),and clinic policies
- **Decision-Making Authority:** Works independently regarding day-to-day tasks, problem-solving, and handling patient complaints at point of service, with complex situations escalating to clinic administration. Consults with clinic administration for guidance and approval concerning matters outside of the established policy.
- **Physical and Sensory Demands**: Possesses keen attention to detail and accuracy, and the ability to perform in a fast-paced, patient/customer facing and varied environment, subject to frequent interruptions and competing priorities. Requires in depth knowledge of and the ability to interpret complex OHIP regulations specific to Optometry. Ongoing development of the EMR system requires keeping current on new functionality. Requirement to be knowledgeable on evolving Clinic policies and procedures and to integrate these into practice. Ability to problem-solve and manage challenging patient behaviour. This position is subject to sitting, standing or walking. Occasionally, physical exertion may be required to unpack and distribute deliveries of products or supplies.
- **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**.**