PRACTICE PERFECT

Ophthalmic Technicians, Part 2: Training and Retaining

BY LESLIE BURLING, CONTRIBUTING WRITER, INTERVIEWING **ANDREA BROWN, SANJAY D. GOEL, MD, NATALIE LOYACANO, COMT, ROUB, OSA, OCSR, (F)ATPO,** AND **ADELINE STONE, COT, CRA, CDOS.**

Last month's *EyeNet* discussed strategies for recruiting technicians. This month, three practice managers and a solo practitioner share their tips for training and—just as important—retaining techs.

Training Techs

If new staff members join your practice without tech certification, there are some strategic, yet straightforward, starting points for developing them into proficient ophthalmic technicians.

Make sure they understand the core knowledge. Ophthalmic terminology, anatomy of the eye, and the elements of an exam make up the key knowledge that a technician needs. (To help them with this, see "Training Resources," next page.)

Teach them to take the patient history. Learning to obtain accurate patient medical histories—based on the core knowledge mentioned above—is essential, said Natalie Loyacano, COMT, ROUB, OSA, OCSR, (F)ATPO. "As a physician extender, the technician must be able to gain the confidence of the patient in order to extract a thorough and accurate chief complaint." Ms. Loyacano is the practice administrator for a solo vitreoretinal clinic in Biloxi, Mississippi.

Use scribing to help techs develop overall knowledge. Spending time working as an ophthalmologist's scribe can accelerate the trainee's development, said Adeline Stone, COT, CRA, CDOS. "It helps them understand treatment plans and the essential elements of the ophthalmologist's decision-making

process, and it improves their computer skills within the electronic health record." Ms. Stone is a practice manager for the Oregon Health & Science University (OHSU) Casey Eye Institute in Portland, Oregon.

Set training goals and then follow up. "Setting goals and meeting milestones during training are important for meaningful growth and advancement," said Ms. Stone. It is difficult to schedule regular assessments in a busy clinic, but "conducting a three-, six-, nine-, and 12-month check-in is ideal to build upon successes, ensure that goals are continually being met, and establish new objectives and correct any shortcomings."

Pair trainees with mentors. "When selecting a mentor, choose a high-performing, established technician who exhibits confidence and patience, can communicate clearly, and has a depth and breadth of knowledge," advised Andrea Brown, director of clinical op-

erations at OHSU Casey Eye Institute.

Keep training consistent. Written procedures are important for training new staff efficiently, said Ms. Loyacano. "We hired two inexperienced employees to become technicians. During the training process, each new technician trained with an experienced technician for one week and then trained with a different one the following week. Discrepancies in training were quickly apparent. Once I created specific protocols and guidelines, training continued much more smoothly with everyone on the same page," she said.

The Role of Cross-Training

Cross-training boosts practice flexibility and resilience. Cross-training is so important in reducing operational disruptions that it should be part of the job expectations for all staff, not just technicians, said Ms. Brown. Once staff are cross-trained, "if someone is on personal time off, you can move your

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MORE AT AAO 2021

The Academy's annual meeting continues to expand its programming for techs. AAO 2021 includes the following:

- Life in the Exam Lane: Your 2022 Scribe/Tech Survival Guide
- Coding Compliance Begins in the Exam Lane
- Regulatory Compliance Competencies for the Ophthalmic Technician
- I Expect My Techs To . . .

Registration opens on June 16

AAO 2021

staff around to ensure that the clinical flow remains consistent and patient satisfaction stays high," she said.

Cross-training improves practice cohesion. Cross-training can equip technicians with a thorough understanding of the patient experience as she or he moves through the practice—from check-in to check-out. Such training is one of the best ways to achieve practice cohesion, and it can help overcome the problem of work silos, where staff in different parts of the practice fail to effectively share information, said Sanjay D. Goel, MD. "Without the ability to understand the challenges faced by staff engaged in other parts of the process, they are unable to interact as a fluid team and overcome challenges together from a place of personal insight and knowledge," said Dr. Goel, a solo practitioner in the Baltimore area.

Training Resources

Encourage education and certification. The Academy offers resources that can help with training (aao.org/omp), including the *Ophthalmic Medical Assisting (OMA): An Independent Study Course,* which includes a textbook and an online exam. The *OMA* textbook walks readers through the key aspects of ophthalmic science, practice techniques, and office interactions, and it includes step-by-step guidance on common procedures. Successful completion of the course is a prerequisite for the Certified Ophthalmic Assistant (COA) examination, which is administered by the International Joint Commission on Allied Health Personnel in Ophthalmology (IJCAHPO, formerly known as JCAHPO). The next levels of certification are the Certified Ophthalmic Technician (COT) and the Certified Ophthalmic Medical Technologist (COMT).

Try a team-based approach. At Dr. Goel's previous practice, a small group tackled the *OMA* course together after the practice offered a bonus for those who completed it. "I answered questions during slow periods in the clinic, and we found time to work on the modules together. Undertaking the task as a team kept everybody working at the same pace, which made the process

more enjoyable for everyone," he said.

Bring staff to New Orleans. The Academy's annual meetings are an excellent place for staff to learn about recent developments in eye care, take continuing education courses, and explore state-of-the-art technology. This year's meeting, AAO 2021, takes place in New Orleans from Friday, Nov. 12, through Monday, Nov. 15. Many technicians also will attend the IJCAHPO annual meeting, Nov. 12-14, which is in New Orleans, too. Ms. Loyacano's practice has made these meetings an annual event for staff. "This is the perfect opportunity for everyone to learn something new that will ultimately benefit our practice," she said.

The High Costs of Turnover

Ophthalmic technicians frequently "train-up" at one practice, then move on to another for a higher salary. This turnover can be costly for practices.

The financial burden of turnover. "By the time you pay for an ad, conduct interviews and background checks, and hire and train, it can cost a practice $4,000, more or less" to replace an employee, said Ms. Loyacano.

The burden on staff. "Most new hires do not perform at 100% productivity for six to eight months after being hired," she said. During this time, "other staff members are compelled to manage an increased workload, which can potentially result in burnout."

Tech Retention

Once staff have been trained, what will keep them happy and on board?

Review (and reward) performance more frequently. Is it enough to review employee performance annually? Not according to Ms. Loyacano, who recently moved to quarterly evaluations. "And whether it is an hourly raise or a gift card, I provide some kind of recognition for their achievements," she said.

Tie incentives to performance goals. Performance goals "should be attainable targets that directly impact the practice, are quantifiable, and are linked to predefined performance standards," said Ms. Brown.

Fund continued training. Ms. Loyacano's practice pays for education, cer-

tification, and recertification up front, so that her staff members never incur out-of-pocket expenses for broadening or deepening their expertise. An essential part of the benefits package is "tuition reimbursement for staff who achieve certification or acquire additional knowledge that improves the practice," she said. "This is necessary for employee retention."

Reward techs for sharpening their skills. Additional training ultimately helps staff to become more efficient, said Dr. Goel, and you should encourage them to continue their education by "offering an increased hourly wage, or by providing a one-time bonus." No matter how you compensate your staff, educational advancement should always be acknowledged, he said.

Ms. Brown is director of clinical operations at OHSU Casey Eye Institute in Portland, Ore. *Relevant financial disclosures: None.*
Dr. Goel is a solo practitioner at Goel Vision, which has two locations near Baltimore. *Relevant financial disclosures: None.*
Ms. Loyacano is the practice administrator for a solo vitreoretinal clinic in Biloxi, Miss., and is Secretary for Certification on IJCAHPO's Board of Directors. *Relevant financial disclosures: None.*
Ms. Stone is the practice manager for the comprehensive eye care division of OHSU Casey Eye Institute and a part-time faculty member at Portland Community College's ophthalmic medical technology program. *Relevant financial disclosures: None.*
For full disclosures, see this article at aao.org/eyenet.

TRAINING RESOURCES

Visit aao.org/omp to learn about Academy and AAOE resources, which include the following:
• *Ophthalmic Medical Assisting: An Independent Study Course*
• *The Ultimate Coding Compliance for Super Scribes and Technicians*
• *Dictionary of Eye Terminology*
• Private consulting service for customized training

(You also can explore IJCAHPO's resources at www.jcahpo.org/education-programs.)