
Overview

This standard describes the day-to-day supervision of the optical clinic ie managing the appointment list of customers attending for eye examinations, sight tests, contact lens-related activities and for other optical reasons. It includes the preparation for the clinic and dealing with post-clinic activities. You need to be able to assess the customer's priority and identify and deal with emergencies. You will be managing the practice's/store's resources as well as dealing with technical issues. Users of this standard will need to ensure that practice reflects up to date information and policies.

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Performance criteria

Carry out pre-clinic preparation

You must be able to:

- P1 ensure that customers' appointments have been confirmed
- P2 ensure customers' records are available and that statutory forms have been completed
- P3 ensure that the equipment is correctly prepared
- P4 ensure that supplies of forms and leaflets are at adequate levels to meet anticipated demand
- P5 identify customers' special needs and agree actions to address these
- P6 identify and alert professional colleagues to potential business opportunities with regard to individual customers
- P7 ensure that the premises are presented according to business requirements
- P8 allocate tasks to your colleagues according to their expertise and competence
- P9 maintain records according to practice/store requirements

Run optical clinic

You must be able to:

- P10 ensure that your colleagues conform to your practice's/store's requirements for personal presentation and hygiene
- P11 ensure that customers' records are up to date
- P12 ensure that customers' needs have been identified correctly
- P13 ensure that the procedures and the roles of your colleagues have been explained to the customer
- P14 keep customers informed of delays and/or problems
- P15 ensure that customers are informed of any other products or clinical services that are likely to benefit them
- P16 ensure that the customer's requirements have been explained to the dispenser in accordance with your practice's handover requirements
- P17 ensure that customers are charged the correct amount
- P18 ensure that the premises are presented according to business requirements

Carry out post-clinic activities

You must be able to:

- P19 ensure that any post-clinic paperwork has been completed and filed correctly
- P20 ensure that orders have been processed correctly

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- P21 ensure that referrals have been processed correctly and customers' records have been updated
- P22 reconcile financial transactions
- P23 ensure that information is stored securely
- P24 ensure that all frames are returned to the correct positions in the display
- P25 ensure that all claims for payment are processed correctly
- P26 collect and collate management information according to your practice's/store's
- P27 use colleagues' and customers' feedback to improve the service
- P28 ensure that the premises are returned to the required standards
- P29 ensure that the premises are secured at close of business

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Knowledge and understanding

You need to know and understand:

Carry out pre-clinic preparation

- K1 the appointments for the day and the personnel on duty
- K2 your practice's/store's procedures for confirming appointments
- K3 which NHS forms are appropriate and the regulations governing these and other benefits
- K4 private customer administration requirements
- K5 the implications of the Data Protection Act
- K6 the implications of the Disability Discrimination Act
- K7 the latest products available and the benefits they offer
- K8 your practice's/store's standards of presentation and any corporate identity
- K9 the competence of the personnel involved
- K10 what to do if the required personnel are not available

Run optical clinic

You need to know and understand:

- K11 your practice's/store's standards of personal presentation and hygiene
- K12 the information required to update records
- K13 the range of products and services that may benefit the customer, the way in which they may benefit the customer and their prices
- K14 how to identify potential emergencies and the actions that should be taken
- K15 the importance of gathering information about the customer and informing the optometrist prior to eye examination
- K16 the importance of introducing the customer to the optometrist
- K17 the importance of the optometrist introducing the customer to the dispenser
- K18 methods of payment
- K19 your practice's/store's standards of presentation and any corporate identity

Carry out post-clinic activities

You need to know and understand:

- K20 the requirements of documentation
- K21 how to complete orders and where to send them
- K22 the importance of processing data quickly and your practice's/store's banking procedures
- K23 your practice's/store's data back-up procedures
- K24 your practice's/store's display plan
- K25 how to complete payment claims and the claims timetable

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- K26 your own level of authority
- K27 your scope to propose improvements
- K28 your practice's/store's standards of presentation and any corporate identity
- K29 your practice's/store's security requirements

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Additional Information

External links

This standard links with the following dimension within the NHS Knowledge and Skills Framework (October 2004):

Dimension: G5 Services and project management

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Suite	Optical Retailing
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