

Berkeley School of Optometry

Externship Material

Patient communications training tailored to your practice goals

Developed in cooperation with



Thank for you for agreeing to participate in the University of Montreal School of Optometry program to enhance our extern's patient communication abilities while at your practice. This material has been designed to complement your interactions with your upcoming externs. It was tested at the Southern College of Optometry in 2017 and yielded excellent results. Specifically it will provide practical strategies that your externs can use in communicating with your practice.

We have divided the material into 10 "lessons", and those into 3 parts, plus a glossary of lenses.

To get the most value from this material, we suggest the following:

- 1. <u>Familiarize yourself with the material prior to Week 1. You may want to discuss with your extern.</u>
- 2. The week before Week 1 we will email you Lesson 1 (plus the lens glossary). Review with your extern. Have him/her work on the lesson through the week, implementing the communication tips during patient interactions. Review at the end of the week.

<u>Part I</u> addresses your practice marketing goals. This should be the first material you review with your externs. (The last lesson will revisit this and look at how to leverage the strategies discussed in Part I and Part II to impact those goals.) **LESSON 1 and LESSON 10.** We suggest you email mail these lessons with your goals and progress against goals to us to provide feedback on how you are utilizing the program. This information will be treated with complete confidentiality.

The material in **Part II** covers 5 situations typically encountered in private practice exams:

- 1. Utilizing the patient intake form
- 2. Setting expectations
- 3. Prescribing lenses
- 4. End of exam check list
- 5. Handing off patient to optical staff

We have endeavored to keep this material concise and to use patient friendly language. Each section discusses the key skills required to effectively communicate within a portion of the patient encounter, and provides sample scripts that demonstrate effective communication techniques. **LESSONS 2-6**

<u>Part III</u> discusses patients' needs—by lifestyle, demographics and common complaints/issues—and provides sample questions designed to encourage dialog with patients, along with some possible product solutions. Our lenses section is designed to be a resource for your extern: it

gives a short description of lens products along with major brands/manufacturers with hyperlinks where available. **LESSONS 7-10**

You will receive one lesson per week.

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Patient Communication for Externs

I Patient Communication Skills/Your Practice Goals

LESSON 1

Work with your extern and fill this section out. Email to cwilmer@berkeley.edu		
What are y	our practice's primary marketing goals?	
1.		
2.		

Sample marketing goals:

- Increase average patient revenue
- Increase capture rate (% of examined patients who purchase prescribed eyewear at your practice)
- Increase second pair sales (sun wear, readers, computer glasses, sports goggles/glasses etc.)
- Increase high performance lens sales (photochromics, no-glare, free form, polarized)
- Increase referrals
- Increase patient satisfaction

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Patient Communication for Externs

This content focuses on 5 key patient contact points and gives simple, practical tips on how to enhance the patient experience through communication skills.

II Patient Communication Skills/Sample Scripts

LESSON 2

Utilizing patient intake form. Too many times in a practice, a patient is asked to complete an intake form and that's the last time she sees it. Use this information! If there are areas that the form doesn't cover—like time spent on digital devices—make sure to cover those areas. To provide the best solution for each patient, you have to spend time discussing their life and how they use their eyes.

1. Explain the elements of the exam and the importance of the intake form.

Thanks for completing our input form. It's one way we can keep track of your general and eye health issues and gives us an idea about how you use your eyes. Our tests will evaluate your vision, including checking for any disease. Doctor "Smith" will review this data, perform tests to diagnose your overall eye health and finalize your eyeglass prescription

2. Use the intake form to drive your dialogue with the patient. For example:

I see you spend a lot of time on the computer. We'll want to make certain you have the best eyewear for optimizing your vision and reducing any computer vision problems.

You commute to work. How do you protect yourself from bright sun and glare? How well do you think you see when driving, especially at dawn and dusk?

So you enjoy fishing? How does the sun affect you when you're on the water?

I see you're in sales. I imagine you're on your cell phone a lot. Do you have any trouble reading the screen? Are you moving indoors and outdoors frequently during the day?

3. Clarify the primary reason for the exam/appointment.

Your last appointment was just about 2 years ago, and you say you haven't noticed any changes in your eyesight, or any specific vision problems or discomfort? We prescribed (description of eyewear prescribed/dispensed) at your last visit. Were you satisfied with these (description) we prescribed last time?

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II Patient Communication Skills/Sample Scripts

LESSON 3

Setting expectations. Patient exams can become routine for you. But for your patient, it's an experience they have only every year or two. Provide a narrative so each patient knows what you're doing and why you're doing it—make it interesting and engage the patient in the whole process!

1. Tell patients what you're going to do, and why.

We'll start with some diagnostic tests first, looking at the overall health of your eyes. Then we will take a look at what kinds of eyewear will help you see your best at all distances and in every kind of light. Then we'll get you out to our optician, who can help you select your frames and discuss your lens options further. They will also review your insurance coverage, our packages and any relevant warranties.

2. Encourage patient participation.

Tell me about your typical day and any vision or eye concerns that you might have. Let's make sure we discuss all the ways you use your eyes. Is there anything that wasn't addressed on the input form that I should know about?

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II Patient Communication Skills/Sample Scripts

LESSON 4

Prescribing lenses. You are the expert. Expand the definition of "prescription"—it's not simply correcting refractive error. It's looking at all the possible visual solutions and benefits you can provide: no-glare lenses, photochromic lenses, sun wear, computer eyewear. Remember, research shows that patients want you to provide a specific recommendation.

1. Tie your prescription recommendations to the patient's vision needs—what the exam uncovered and what the patient shared with you.

You mentioned you have some discomfort with computer screens and also difficulty reading signs at night. I'm prescribing no glare lenses. These lenses will virtually eliminate visionimpairing glare and maximize the useful light.

I'm going to prescribe no line multi-focal lens with a no-glare treatment to give you comfortable clear vision at all distances including the computer and maximize your night vision.

I want to be that we are protecting your eyes from potentially harmful UV rays and blue light from the sun and your digital devices. I am prescribing lenses that will darken when you go outside. They are clear inside and will change so gradually you won't even notice it—but your eyes will be much more comfortable, won't have to work as hard, and most importantly, your eyes will be protected.

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II Patient Communication Skills/Sample Scripts

LESSON 5

End of exam check list. A lot goes on during the patient's visit to your office. Take a minute to give an overview, and to underscore how you have leveraged your expertise to ensure he will get the best possible vision care today, and tomorrow.

1. Review current vision and long term outlook. For example:

As we age, our eyes typically become drier, I don't see any signs of dry eye and you didn't mention any symptoms yet, but you'll want to be on the lookout for things like itchy or burning eyes. We'll want to be sure to have you back next year (or two) to monitor your eye health.

We checked for glaucoma and macular degeneration and everything looks good today, but we'll want to monitor that every year (or two). We are seeing that your internal lenses are beginning to yellow a little. That is the beginning of cataracts so we'll keep an eye on that as well.

Your hypertension high blood pressure drugs seem to be doing their job, as I note no signs in your eyes of high blood pressure.

2. Refraction and vision enhancement prescription.

The natural aging process causes us to lose our ability to focus up close. It's called presbyopia. I am prescribing a no-line, multi focal lens that is specifically designed for your eyes; it will make distance viewing and up-close reading much easier. Within a few days you'll be seeing like you did 20 years ago at distance, near and all distances in between.

I'm also prescribing photochromic lenses. These lenses are very popular with our patients; they comfortably adjust automatically to the light so your eyes are always protected from sunlight, harmful UV rays and blue light. As we age, we need all the help we can get to ensure our best vision and that is just what photochromic lenses can do.

With nearly one third of auto accidents occurring because of glare, I'm also prescribing polarized sunglasses, they will be especially helpful while driving and for prolonged periods in the sun.

They will offer great vision and maximum protection when in the sun.

3. Pharmaceutical and OTC recommendations

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I recommend you take a multivitamin daily, that way we can be confident you're getting the vitamins you need for healthy vision. Eat lots of dark leafy greens and colorful vegetables to ensure you're getting antioxidants that help protect your eyes and your body.

4. When to return and why.

I want to make certain we monitor your vision and eye health. We want to make sure you see your best for everything that matters to you and insure you have a lifetime of healthy vision. I'll have my staff schedule you for another exam in a year.

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II Patient Communication Skills/Sample Scripts

LESSON 6

Handing off patients to optical staff. The patient comes to you because you are the "eye doctor". Your expertise is what she values. Extend your expertise to the staff: explain that they will complement the thorough exam that you started. Make certain these discussions aren't within earshot of other patients.

1. Introduce the optician.

Mrs. Smith, as we've discussed, there have been some changes in your vision. There is new technology that will allow us to address these issues better than ever before. Mary is our expert on digital lenses, lens treatments and materials. I want to go over with her what I am prescribing and get her input.

2. Review the prescription.

Mrs. Smith has shared she has trouble reading signs when driving at night and her night vision isn't as good as it used to be. She is more sensitive in bright sunlight. Since she likes to spend time outdoors with her grandchildren and gardening, I am prescribing no-glare lenses to let her see better driving at night combined with photochromics which will automatically darken in the bright sunlight. This will be her primary pair of glasses. Because she spends so much time outside, I am also prescribing polarized sun lenses to give her comfortable sharp vision when outside for longer periods, and help her be safer while driving in the bright sun.

3. Reinforce when you want to see the patient again. And thank them for trusting their eye care and eye wear needs to you!

It was great seeing you again Mrs. Smith. I'll have our front desk schedule you for your next exam in 12 months. We realize that you have a lot of options for eye care and we appreciate your continued choice of being with us.

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Patient Needs

Quick and succinct information on patient needs. This content is designed to be patient friendly, less clinical. It should help you start communicating with patients in their vernacular.

III Patient Needs/Lifestyle

The second section will deal with patient needs. These will be divided into three categories

- Lifestyle (profession, hobbies etc.)
- Demographics (children, millennials, older patients, ethnic groups)
- Complaints/issues—beyond refractive issues

Each need would be associated with a set of questions designed to provide the student with better information, encourage engagement and practice patient communication skills.

LESSON 7

Lifestyle	Questions
Computer/device user	How many hours per day do you spend on digital devices each day? Primarily hand held or computer distance? At what distance? Are you familiar with the recommended 20/20/20 concept? Do you experience headaches, eye strain, or eye fatigue, and if so, how long before experiencing these symptoms?
	Product solutions to consider: AR coating for glare reduction Computer lenses for appropriate distance Transitions lenses for blue light reduction and overhead light relief
Sports	Do you participate in sports that involve racquets or flying objects? For example, racquet ball, tennis, baseball, hockey? Do you participate in any sports where your vision is an important part of performance? Did you know that there are many sports specific eyeglasses that can significantly improve your visual performance when participating in your sports and provide much better protection? Do you play any sports where contrast and/or protection from sunlight and glare are important?
	Product solutions to consider: • Polycarbonate lenses

Photochromics Sports goggles Swim goggles Polarized lenses for water or snow activities Contrast enhancing golf lenses for golfers **Driving** When you drive, how do you protect yourself from the sun? What part of the day do you find the most vision-challenging in terms of driving? Have you noticed any difficulty driving at night? Did you know that about 1/3 of auto accidents are caused by blinding glare from the sun? **Product solutions to consider:** Polarized sun lenses for driving in the sun Photochromic polarized lenses that slightly darken for daytime and night time driving Photochromic lenses that moderately darken in the car for daytime and night driving AR for night driving to reduction reflections Occupational/Avocational Tell me about your job.....and your hobbies. safety Are you concerned about eye injury, or have any of your colleagues experienced an eye injury at work? If you wear safety glasses, when is the last time you changed the prescription? Do you go in and out of doors a lot in your job or hobbies? (Sales, delivery etc.) **Product solutions to consider:** Safety glasses with side shields Polycarbonate lenses Photochromic lenses for jobs going in and out of doors Indoors/outdoors On an average day, do you find yourself in a lot of different lighting conditions? Are you familiar with the latest photochromic, or light adaptive lens technology? (Are you familiar with lenses that change from light to dark depending on lighting conditions) Did you know that UV protection can slow down cataract progression? **Product solutions to consider: Photochromic lenses Near point tasks** Show me how you read your phone screen. Are you comfortable reading small print? Do you have any hobbies or work tasks that strain your vision up close? **Product solutions to consider: Computer lenses** Prescription reading glasses **Public speaking** How important is your appearance to your job?

When you see photos or videos of yourself, do you like the appearance of your eyeglasses? Do you speak in public, on stage or in larger groups? **Product solutions to consider:** • AR lenses Works outside How much of the day do you spend outside? And typically what time? Are you sensitive to bright sunlight? How do you protect yourself from sunlight, harmful blue light and UV rays? Are you familiar with the relationship between exposure to bright light and night vision? Did you know your eyewear can help reduce crows' feet and wrinkles? Is this a feature you might like to explore? How often do you experience glare? How bothered are you by glare? **Product solutions to consider: Photochromic lenses Polarized sun lenses**

Review the patient need categories with you extern.

- Are there other lifestyle areas to consider?
- What other questions can your externs come up with to address each lifestyle category's vision needs and challenges?

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III Patient Needs/Demographics

Quick and succinct information on patient needs. This content is designed to be patient friendly, less clinical. It should help you start communicating with patients in their vernacular.

LESSON 8

Demographic	Questions
African American	When was the last time you saw your primary care doctor? Are you getting regular tests for hypertension (high blood pressure) and diabetes from your PCP? Are these conditions prevalent in your family? (should be in their history) Are you aware of the higher incidence of glaucoma, high blood pressure and diabetes among African Americans?
Asian American	When was the last time you saw your primary care doctor? Did you know that as an Asian American, you have a higher risk of diabetes? There are several conditions that disproportionately affect Asian Americans—diabetes and tuberculosis specifically. Are you under the care of a PCP who can be on the look-out for these? Are you aware that regular eye exams can check for a specific (angle closure) glaucoma that occurs more often in Asian Americans? Myopia/nearsightedness is more common in Asian Americans and can be somewhat controlled. Are your children getting regular exams?
Children	Does your classroom have a chalkboard, whiteboard or smart board? Do you ever have problems seeing the board? Do you wear sun glasses when outdoors? What type of sports do you play? Indoors or outdoors or both? Product solutions to consider: • Photochromic lenses (kids less likely to change from one pair of glasses to another!) • Sports protection • Polycarbonate lenses
Forty/Fifty and older	Do you have trouble reading your smart phone screen? How do you protect yourself from glare and reflections? Is night time driving getting more difficult? Are you having any issues driving at night? Product solutions to consider: Photochromic lenses Polarized sun lenses AR lenses
Millennials	Have you heard about the potential danger of blue light? How much time do you spend on digital devices each day, including phone, tablet or computer? How much time do you spend outdoors?

Product solutions to consider:

- Photochromics for blue light, glare and UV protection.
- Blue light coatings.

Review the patient need categories with you extern.

- Are there other demographic areas to consider?
- What other questions can your externs come up with to address each demographic category's vision needs and challenges?

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III Patient Needs/Complaints and Issues

Quick and succinct information on patient needs. This content is designed to be patient friendly, less clinical. It should help you start communicating with patients in their vernacular.

LESSON 9

Complaint/issue	Questions
Bothered by brightness	Do you wear sun protection outside? While driving? Do you notice your eyes take a while to adjust from dark to light and from light to the dark? Do you use sunscreen when you're out in the sun? Have you tried photochromic lenses?
Darkness adjustment	How long does it take you to adjust to the dark once you've been out in the bright sun? Are you aware that exposure to bright sun, unprotected, can significantly reduce your eyes' ability to adjust to the dark? Have you tried photochromic lenses?
Fatigued, tired eyes	Do your eyes burn or do you find yourself rubbing your eyes a lot? What precautions have you taken to alleviate tired eyes? How much time do you spend in front of a computer screen or hand-held digital device? Have you tried computer lenses?
Night time driving	What is most problematic for you driving at night? Have you noticed this getting worse? Do you wear sun protection during the day? Have you tried no glare lenses?
Reflections	Do you notice reflections, when do you notice them? Have you ever noticed light bouncing off the front of your lenses when you look in a mirror? Have you tried no-glare lenses?
Squinting	Do you find yourself squinting when outdoors? Are you concerned about the cosmetic effects of squinting like crows' feet and wrinkles? Does squinting fatigue your eyes? Have you tried photochromic or polarized lenses?

Review the patient need categories with you extern.

- Are there other complaints/issue to consider?
- What other questions can your externs come up with to address each complaint/issue?

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LESSON 10

I Patient Communication Skills/Your Practice Goals

Think how the patient communication skills discussed in part I and II helped achieve your practice goals. (SEE LESSON 1 for your practice goals).

Example:

Goal 1 is increasing referrals.

- Utilizing patient intake form?
 - Suggest that the patient's spouse, children or other family members make an appointment for an exam.
 Especially key for parents, too often kids get just a cursory screening that doesn't uncover a lot of possible problems.
- Setting expectations?
 - When you involve the patient in the exam process, he can better relate to the importance of the service you
 are providing, and he can better relate your clinical evaluation and recommendation to his personal needs.
 This is the kind of relevant experience patients share with others!
- Prescribing lenses?
 - Tell the patient you've confident he'll enjoy his new lenses. Encourage him to tell his family and friends how much better he can see!
- End of exam check list?
 - The check list communicates to the patient that you are sincerely concerned about his vision and overall health. This is the kind of practices patients like to refer friends and family to.
- Handing off patients?
 - Your optical staff can make or break a patient's impression of your practice. Make sure they are comfortable
 integrating your recommendation into their dialog with the patient.

Goal 1 (fron	n Lesson 1)
• Util	izing patient intake form?
• Set	ting expectations?

Prescribing lenses?
End of exam check list?
Handing off patients?
Goal 2 (from LESSON 1)
Utilizing patient intake form?
Setting expectations?
Prescribing lenses?
End of exam check list?

•	Handi	ing off pati	ients?			

Return this completed form to $\underline{\text{cwilmer@berkeley.edu}}$

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GLOSSARY OF LENSES

The information provided is comprehensive but does not delve into highly specialized products or contact lenses.

- Lens materials
- Lens treatment
- Lens designs
- A list of brands/manufacturers for each lens would be provided (with a clear proviso that the list is not inclusive, we would make every effort to include the major players).
- Links to brands'/manufacturers' websites.

LENS MATERIALS

Material	Description	Major brands/manufacturers
Glass	Glass lenses offer exceptional optics and are very durable in terms of scratches. They are heavy and can break more easily than other materials. Glass lenses are no longer widely used for eyeglasses.	X-Cel Optical
High index	High index lenses allow patients with stronger prescriptions to consider more frame options. Thinner and lighter than standard plastic lenses, they are less bulky and much more comfortable. They are a more expensive option.	Essilor Hoya Seiko Vision Ease X-Cel Optical Younger Optics
Plastic/CR-39	Lightweight and affordable, these lenses are widely prescribed and generally come with a scratch resistant coating to prolong the life of the lenses.	Available through all labs and lens manufacturers
Polycarbonate	Lighter and thinner than standard plastic, polycarbonate lenses are virtually unbreakable. They are especially well suited for both active adults and children. Their optics have dramatically improved in recent years.	Essilor X-Cel Optical
Trivex	Impact resistant with abbe value (measure of optical clarity) nearly equal to glass lenses for sharper, crisper vision. Thinner than CR-39 and excellent for drilled or grooved rimless lenses	<u>Younger Optics</u> <u>Hoya</u>

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LENS TREATMENTS

Treatment	Description	Major brands/manufacturors
Anti-reflective (AR)	"No-glare" lenses reduce glare from the front and back of lenses. This can be particularly helpful for night driving and working on a computer. AR lenses are also more cosmetically pleasing, eliminating the glare that bounces off the front of lenses: a consideration for people who make a lot of presentations or are on camera. Back-side AR is especially helpful for darker and polarized sunglasses to prevent distracting reflections. They also provide scratch resistance	Essilor Hoya Seiko Shamir Signet Armorlite/Kodak Zeiss
Blue light	Lenses that reduce the amount of blue light that reaches the eye. Blue light can be harmful to vision, causing blurring and headaches; it also contributes to poor sleeping. Blue light is emitted from electronic devices and from the sun. Most blue light coatings will eliminate about a third of blue light. Photochromic lenses have a similar performance indoors but outdoors cut most of the blue light that comes from the sun. Contrary to popular belief, the sun is the largest singular source of harmful blue light.	Essilor Nikon Transitions Zeiss
Fixed tint sun wear	Fixed tint sun lenses (both prescription and plano) provide protection from potentially harmful UV rays. They significantly reduce the light (up to 80-90%) from the sun for more comfortable vision when in bright light. They are available in standard gray and brown, as well as other colors that are designed for various sports activities. Sun protection is important for all patients, including contact lens wearers.	Shamir X-Cel Optical Labs can tint most lenses
Photochromic	Photochromic lenses provide comfort and convenience for patients, and have a very high patient satisfaction and re-purchase rate. They adjust automatically to light and provide protection from potentially harmful UV rays and blue light. Available in virtually all lens types and designs.	Essilor Nikon Signet Armorlite/Kodak X-Cel Optical Younger Optics Zeiss
Polarized	These sun lenses eliminate horizontally reflected glare—the glare from reflective surfaces like roads, water, snow. They also	Essilor DriveWear X-Cel Optical

	protect from UV and improve color contrast and vision clarity by reducing glare. Polarized sun lenses are especially beneficial when driving, on the water or in winter.	Younger Optics
Scratch resistance	SRC (scratch resistant coating) is standard in most lenses today. Important for both front and back surfaces of lenses, SRC will reduce scratches and abrasions and extend the life of lenses.	Available on virtually all lenses.
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LENS DESIGNS

Aspheric	Aspheric lenses have complex front surfaces that gradually change in curvature from the center of the lens out to the edges. This allows for a flatter curve than a regular spherical lens, so the eyeglass lenses are thinner and more cosmetically appealing and allow for improved peripheral vision. Often, aspheric lenses are made from high index materials which enhance the lens thinness. They can be especially beneficial for patients with high plus prescriptions.	Essilor Airwear Seiko Signet Armorlite X-Cel Optical Younger Optics
Computer	Specifically designed multi-focal lenses to make computer-work more comfortable by offering a larger mid-range area than traditional progressive lenses. These lenses primarily focus on the typical distance from a computer to a user's eyes, but can include enhanced near and some distance vision while reducing reflections from the screen and blue light.	Hoya Nikon Shamir Signet Armorlite/Kodak Zeiss
Free form	A digital, computer-aided manufacturing process that takes digital measurements from the exam and creates customized lenses in the optical laboratory that are specific to the patient's unique prescription and frames.	Hoya Seiko Signet Armorlite/Kodak Younger Optics Zeiss
Bifocal, Trifocals	Lenses that combine two or more prescriptions (near, distance, and/or intermediate vision). These bifocals or trifocals have a line that separates the sections.	Bifocals are available through all labs and lens manufacturers
Progressive	Progressives are multi-focal lenses that have been fabricated to eliminate the line and create an unlimited range of focal power. They gradually incorporate slight power changes between near, intermediate and distance vision.	Essilor Hoya Nikon Seiko Shamir Younger Zeiss
Reading /Near	Single vision lenses that focus on reading distance. A better alternative to drug store readers that have the same correction for both eyes, prescription reading glasses are customized to the patient's individual eyes	<u>Nikon</u> <u>Shamir</u>

	and can be prescribed for specific visual tasks at different working distances.	
Single Vision	Lenses that correct either nearsightedness (myopia), farsightedness (hyperopia), astigmatism or any combination and can be prescribed for any working distance, but primarily for distance or near	Available through all labs and lens manufacturers
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