

# **A SUMMARY OF THE PRACTICE MANAGEMENT CURRICULUM**

**AND**

## **A LIST OF BEHAVIORAL OBJECTIVES**

**This summary was compiled for the ASCO Clinic Directors SIG. It reflects a model curriculum that will be proposed at the Association of Practice Management Educators conference in April, 1998. You will note that many of the curriculum topics includes a Chapter number. The number refers to the chapter covering the material in Business Aspects of Optometry, the text book co-authored by practice management educators from all the schools.**

**If you have any questions of the contents or desire any clarification, please call Peter Shaw-McMinn, O.D. at (909) 780-0270.**

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# PRACTICE MANAGEMENT I

## OVERVIEW

Generally, most entering freshmen optometry students have limited exposure to types of practice within optometry. Freshmen students are also anxious to learn subject matter directly relevant to practice management and patient care. The purpose of this course is to provide educational learning experiences, assignments, and projects to facilitate the learning of knowledge, resources and confidence in planning 1) personal and professional goals, and 2) financial arrangements necessary to reach the goals.

In order for the graduate to choose the type of practice most apt to allow them to reach their personal and professional goals, the student must learn several new behaviors. In this course the student learns to set personal goals, use personal finance strategies to manage debt, know about the characteristics of professions and their effect on non-optometric career choices, advantages and disadvantages of modes of practice, scope of optometric practice, historical events affecting the profession of optometry, the state of optometry today, and optometric organizations supporting optometry.

Emphasis is placed on personal goal setting and preparing a personal needs analysis to develop a lifetime practice plan. Ethical implications of career choices are discussed throughout the curriculum.

## **INTRODUCTION TO PRACTICE MANAGEMENT**

### **OBJECTIVE:**

The student will be able to;

- 1) Define what is meant by practice management.
- 2) List components of the practice management curriculum
- 3) Recognize the process required to obtain the necessary practice management skills.
- 4) Realize people excel in communities of excellence.

## **PERSONAL GOAL SETTING**

**OBJECTIVES:** The student will be able to;

- 1) Explain the importance of goal setting.
- 2) Define what is meant by a goal and describe the important parts of a goal.
- 3) Outline the process required in setting goals.
- 4) Set personal goals for the future.

## **PERSONAL FINANCE**

**Objectives:** The student will be able to;

- 1) explain the importance of sound personal finance to reaching their goals.
- 2) define and calculate their net worth.
- 3) prepare a budget and cash flow projections for four years in optometry school.
- 4) recognize the similarity between personal finance accounting and office accounting reports.

## **NON-OPTOMETRIC OPPORTUNITIES AVAILABLE FROM A CAREER IN OPTOMETRY**

**OBJECTIVES:** The student will be able to;

- 1) recognize the lifelong opportunities available to an optometrist
- 2) list and describe factors which led to the status achieved by optometry
- 3) explain the advantages of optometry similar careers such as medicine, dentistry, law
- 4) to list and describe the advantages offered by a career in optometry

## **MODE OF PRACTICE LESSON PLAN**

**OBJECTIVES:** The student will be able to;

- 1) recall the advantages and disadvantages of the different modes of practice
- 2) recognize which mode of practice best fits their situation at this time
- 3) recognize the need for beginning on developing an adequate C.V.
- 4) write their curriculum vitae and recognize areas requiring improvement

## **SCOPE OF OPTOMETRIC PRACTICE**

**Objectives:** The student will be able to;

- 1) list the subspecialties available to optometrists
- 2) recall the patient populations which frequent each subspecialty
- 3) recognize unique aspects of each choice
- 4) begin choosing subspecialty areas that fit their needs and interests

## **PATHOLOGY DETECTION AND TREATMENT SERVICES**

**OBJECTIVES:** The student will be able to;

- 1) recognize that pathology related services are a part of every optometric practice
- 2) market their pathology services as a benefit to their patients
- 3) list modes of practice that emphasize pathology
- 4) recall unique aspects of providing these services

## **LOW VISION SERVICES**

**Objectives:** The student will be able to;

- 1) define what is meant by a low vision patient
- 2) describe low vision services available to help partially-sighted patients
- 3) recall unique aspects of offering low vision services

## **CONTACT LENS SERVICES**

**OBJECTIVES:** The student will be able to;

- 1) list and explain five unique aspects of contact lens practice
- 2) describe patient populations requiring contact lenses
- 3) list advantages of contact lens over spectacles

- 4) explain advantages and disadvantages of providing contact lens services in their practice

## **VISION THERAPY SERVICES**

**OBJECTIVES:** The student will be able to;

- 1) describe and discuss the different models of vision and how this affects the practice of optometry
- 2) list the patient populations benefiting from vision therapy services
- 3) recall the history of vision therapy and role of OEP and COVD
- 4) explain differing viewpoints concerning controversies in VT

## **THE AMERICAN OPTOMETRIC ASSOCIATION**

**OBJECTIVE:** The student will be able to:

- 1) name five benefits of joining the AOA.
- 2) list the highlights of AOSA membership.
- 3) demonstrate the need to support organized optometry by joining the AOSA.

## **THE HISTORY OF OPTOMETRY**

**Objectives:** The student will be able to;

- 1) describe three factors resulting in the profession of Optometry appearing in 1900.
- 2) list four factors contributing to changes in the scope of optometry since that time.
- 3) understand the implications of the development of optometry as separate and different than that of ophthalmology

## **CHAPTER 1 PRACTICE DEMOGRAPHICS**

**Objective:** The student will be able to;

- 1) Recall the status of the profession as of 199\_.



## **PRACTICE MANAGEMENT II**

The purpose of this curriculum is to provide educational information and exercises that facilitate the learning of knowledge and skills necessary for presenting a desired image when providing patient care. The desired outcome is that students will be able to apply these learned principles during their first clinical rotation and recognize the effect on patient satisfaction.

The course is given to students having finished the second year of optometry school and seeing patients in the clinic for the first time. 18 hours are given to 48 students over six weeks. Each week there is a three-hour session during the summer quarter. The setting is round table discussions in a class room. Emphasis is placed on the ethical implications of professional practice. Doctor/patient communication methods are stressed that would enable the patient to fully evaluate the consequences of various treatment and management options.

### **INTERNAL MARKETING**

**OBJECTIVES:** The student will be able to:

- 1) explain the difference between marketing and advertising
- 2) choose a practice identity consistent with their image
- 3) choose marketing strategies for their first practice
- 4) recognize that the doctor is constantly marketing to the patient

### **USE OF COMPUTERS**

**Behavioral Objectives:** The student will be able to:

1. recall the use of computers in the various aspects of running a practice.
2. use officemate software to keep financial and production records of the patients seen in their module by them

### **ROLE AND RESPONSIBILITY OF THE CLINICIAN**

**BEHAVIORAL OBJECTIVES:** The student will be able to;

1. create a script and procedure for greeting the patient
2. provide educational materials in an information packet to the patient
3. convey the benefits of each testing procedure to the patient during the examination.
4. communicate findings and relate to recommended treatment options.
5. demonstrate the role of the clinician in recall
6. create a script for saying goodbye to the patient

## CHAPTER 31 RISK MANAGEMENT

**Behavioral Objective:** The student will be able to;

- 1) list the most frequent reasons for malpractice claims to be filed against optometrists and explain how to avoid a lawsuits in each case
- 2) describe the four elements necessary to prove medical negligence
- 3) diligently document test results, important communications, and treatment plans
- 4) understand typical malpractice insurance coverage and the handling of malpractice claims

### DEMONSTRATING THE BENEFITS OF LENS OPTIONS

**BEHAVIORAL OBJECTIVES:** The student will be able to;

- 1) enhance the perceived value of the clinician's recommendations
- 2) train an optician on proper demonstration of Doctor's recommended lens treatments
- 3) present fees in a manner so the patient recognizes the worth of the expense
- 4) present the role of the optician in recall and follow-up

### DEMONSTRATING THE BENEFITS OF FRAME DESIGN AND MATERIALS

**BEHAVIORAL OBJECTIVES:** The student will be able to;

- 1) train the optician on communicating the benefits of different frame designs and materials
- 2) explain the benefits of higher end frames to better meet the patient's needs

### PRESCRIBING VISION THERAPY

**BEHAVIORAL OBJECTIVES:** The student will be able to;

- 1) educate the patient about the possible need for vision therapy after taking the history
- 2) choose the proper tools in communicating the benefits of vision therapy to improve patient performance
- 3) present fees in a logical, non-judgmental manner
- 4) prescribe vision therapy and overcome obstacles in achieving patient compliance

## CHAPTER 22 CONTACT LENS PRACTICE

**OBJECTIVE:** The student will be able to;

1. complete an internal marketing plan to increase contact lens purchase from existing patient base.
2. design an external marketing plan to bring in new contact lens patients
3. develop policies and procedures for handling contact lens practice

## PRESCRIBING DISPOSABLE CONTACT LENSES

**Behavioral Objectives:** The student will be able to;

1. recognize case history findings which indicate the possible need for contact lens prescribing.
2. list the benefits of disposable contact lenses and relate them to patient lifestyle needs.
3. choose the proper tools in communicating disposable contact lens benefits to improved patient performance.
4. utilize trial lenses to demonstrate the advantages of contact lenses.
5. present fees in a logical, non-judgmental manner.
6. prescribe disposable contact lenses and overcome obstacles in achieving patient compliance.

## CHAPTER 20 RECALL SYSTEMS

**BEHAVIORAL OBJECTIVES:** The student will be able to;

- 1) explain the importance of recall systems.
- 2) design a mailing recall system.
- 3) design a telephone recall system.
- 4) design a computer assisted recall system.

# PRACTICE MANAGEMENT III

## OVERVIEW

The purpose of this curriculum is to provide educational experiences that facilitates the learning of knowledge and skills necessary for entering a desired mode of independent practice. The students will be versed in the numerous options available to them and be able to choose that most beneficial to his/her personal situation. The desired outcome is that the student will be able to enter this best practice situation immediately upon graduation.

## INTRODUCTION TO PRACTICE MANAGEMENT III

**BEHAVIORAL OBJECTIVE:** The student will be able to;

- 1) explain the importance of investigating practice opportunities at this time
- 2) recognize there is much to learn about how to evaluate the opportunities

## PROFESSIONAL GOAL SETTING

**OBJECTIVE:** The student will be able to;

- 1) recall the many professional goals available to them for planning their optometric career.
- 2) choose three communities which provide the necessary resources for a chosen lifestyle and optometric practice.
- 3) list five important factors used to choose a community to practice in.
- 4) recognize there are many different manners in which to enter independent practice. The student will be able to recognize the options available to them in planning professional goals.

## CHAPTER 6 DECIDING WHERE TO PRACTICE

**Behavioral Objective:** The student will be able to;

- 1) choose three communities which provide the necessary resources for his chosen lifestyle and optometric practice.

## CHAPTER 7 PRACTICE FINANCING

**Behavioral Objective:** The student will be able to;

- 1) develop a business plan for financing a practice opportunity
- 2) list and describe sources of financing
- 3) explain advantages and disadvantages of seller financing

## CHAPTER 8 OBTAINING A BUSINESS LOAN

**Behavioral Objective:** The student will be able to prepare a loan proposal in order to obtain financing for opening their desired practice. This includes the ability to;

- 1) estimate costs of opening a practice.
- 2) estimate the potential income and expenses of a new practice.
- 3) prepare a cash flow projection for five years.

## CHAPTER 9 UNDERSTANDING OFFICE LEASES

**Behavioral Objectives:** The student will be able to;

- 1) identify important aspects of an office lease
- 2) recall portions of the lease which may be negotiable
- 3) obtain professional expertise in evaluating a lease

## CHAPTER 10 OFFICE DESIGN

**Objectives:** The student will be able to;

- 1) list what is needed to know before beginning to design a practice
- 2) use logic in designing an office space
- 3) describe desirable elements in the office design consistent with their desired image

## CHAPTER 11 INSTRUMENTATION AND EQUIPMENT

**Objectives:** The student will be able;

- 1) develop a step-by-step plan to acquire equipment necessary for the office
- 2) explain a rationale for choosing equipment
- 3) list the advantages and disadvantages of leasing ophthalmic equipment

- 4) analyze the cost effectiveness of a purchase of a new instrument

## **CHAPTER 21 OPHTHALMIC DISPENSING**

**Behavioral Objective:** The student will be able to;

- 1) explain the importance of dispensing to an optometric practice
- 2) design a dispensary to project the desired image
- 3) develop policies and procedures that are consistent with this image
- 4) explain how 'lifestyle dispensing' may be used in a practice

## **CHAPTER 13 SELECTING AND USING AN OPTICAL LABORATORY**

**Behavioral Objective:** The student will be able to;

- 1) develop a plan for selecting a primary optical laboratory
- 2) list and describe the services offered by optical laboratories

## **CHAPTER 14 IN-HOUSE LABORATORIES**

**Behavioral Objective:** The student will be able to;

- 1) describe the advantages and disadvantages of having an in-house laboratory
- 2) design an in-house laboratory

## **CHAPTER 15 ORGANIZING AN OFFICE**

**Behavioral Objective:** The student will be able to;

- 1) develop a plan with a timetable for starting a practice
- 2) make organizational decisions which are consistent with their office identity

## **CHAPTER 2 SELF-EMPLOYMENT OPTIONS**

### **ASSOCIATESHIP/PARTNERSHIP**

Behavioral Objectives; The student will be able to

- 1) List twenty advantages of partnership practices.
- 2) Outline a process in which to find a partnership opportunity.
- 3) Describe creative ways in which to structure buying into a partnership.
- 4) Explain different manners in which to split up the income in a partnership practice.

- 5) Recall twenty important provisions in a partnership contract.

## **EXPENSE-SHARING**

**Behavioral Objectives:** The student will be able to:

- 1) define what is an expense-sharing practice arrangement.
- 2) describe three possible expense sharing arrangements.
- 3) list the advantages and disadvantages of an expense sharing practice.
- 4) create a step-by-step plan to enter into an expense sharing agreement.

## **CHAPTER 3 PURCHASING A PRACTICE**

**Behavioral Objectives:** The student will be able to;

- 1) list and describe the advantages and disadvantages of purchasing a practice
- 2) appraise a practice
- 3) describe different ways of financing a practice purchase

## **CHAPTER 28 ANALYSIS OF PRACTICE ECONOMICS AND GROWTH**

**BEHAVIORAL OBJECTIVE:** The student will be able to;

- 1) complete a balance sheet for a practice.
- 2) complete a profit-loss statement
- 3) analyze financial statements
- 4) design and interpret productivity statistics for a practice

## **PRACTICE MANAGEMENT IV**

### **OVERVIEW**

The fourth year practice management curriculum is designed to integrate the prior three years of practice management concepts into a worthwhile practice plan. The students are at a stage in their optometric careers where they are deciding whether they are ready to enter a particular type of practice. The lecture series is sequenced to give the most up-to-date data on cost figures and step-by-step plans by which they can make their decisions. This course includes exposure to practice plans implemented by practicing optometrists with emphasis on the subspecialties within optometry.

## **CHAPTER 5 PRINCIPLES OF NEGOTIATION**

**Objectives:** The student will be able to;

- 1) list in order and explain the steps to use in negotiation
- 2) negotiate a win-win agreement

## **CHAPTER 4 EMPLOYMENT OPTIONS**

**Objectives:** The student will be able to;

- 1) explain why many students seek employment for a few years after graduation
- 2) list and discuss employment options

## **CHAPTER 23 FEES AND ACCOUNTING SYSTEMS**

**Behavioral Objective:** The student will be able to:

- 1) recall the history of setting fees in optometric offices
- 2) list and describe factors used in setting fees for services and ophthalmic products
- 3) choose fees which are consistent with their practice identity
- 4) compare and contrast between pegboard and computer accounting systems

## **CHAPTER 24 CREDIT AND COLLECTIONS**

**Behavioral Objective:** The student will be able to;

- 1) list and describe the five basic methods of payment
- 2) recall legal considerations of extending credit to patients
- 3) develop credit and collections protocol to use in their office

## **CHAPTER 27 TAX REPORTING**

**Behavioral Objectives:** The student will be able to;

- 1) list and describe the tax reporting obligations of a sole proprietor, partnership, or S-corporation.
- 2) recall deductible expenses on a schedule C.
- 3) calculate self-employment tax, retirement tax, medicare tax, and unemployment tax.



## CHAPTER 16 SELECTING AN OFFICE STAFF

**Behavioral Objectives:** The student will be able to;

- 1) list attributes of paraoptometric personnel to hire for a new practice.
- 2) identify the job classification responsibilities, the qualifications and personal attributes necessary to perform them.
- 3) understand the factors involved in order to develop efficient and productive teamwork.
- 4) negotiate employee compensation with the applicant you wish to hire
- 5) know legal issues involved in hiring and firing employees.

## CHAPTER 17 MANAGING AN OFFICE STAFF

### MOTIVATING EMPLOYEES

**BEHAVIORAL OBJECTIVE:** The student will be able to recognize employee needs and how use this knowledge to motivate them.

### TRAINING STAFF

**BEHAVIORAL OBJECTIVE:** The student will be able to design lesson plans and activities to be used in training employees.

### MANAGEMENT STYLES

**BEHAVIORAL OBJECTIVE:** The student will be able to recognize different management styles and know when each style is appropriate.

## CHAPTER 25 MANAGED CARE AND THIRD-PARTY REIMBURSEMENT

**Behavioral Objective:** The student will be able to;

- 1) define what is meant by managed care and describe different types of health care plans
- 2) determine the correct E/M codes to use
- 3) complete a HCFA 1500 form for a typical patient with ARMD

## CHAPTER 26 MEDICARE AND MEDICAID

**Behavioral Objective:** The student will be able to;

- 1) describe who is covered by Medicare and Medicaid
- 2) explain billing policies of the Medicare and Medicaid programs
- 3) understand the implications of participating or not participating in the programs

## CHAPTER 30 QUALITY ASSURANCE

**Behavioral Objective:** The student will be able to;

- 1) state a philosophy of care
- 2) list and describe quality assurance factors in providing ophthalmic materials
- 3) develop a systematic record review policy

## CHAPTER 22 CONTACT LENS PRACTICE

**OBJECTIVE:** The student will be able to;

- 1) Complete an internal marketing plan to increase contact lens purchase from existing patient base.
- 2) Design an external marketing plan to bring in new contact lens patients
- 3) Develop policies and procedures for handling contact lens practice

## CHAPTER 29 MARKETING

**BEHAVIORAL OBJECTIVE:** The student will be able to;

- 1) explain the difference between marketing and advertising
- 2) choose a practice identity consistent their image and the patient population.
- 3) identify 100 marketing techniques.
- 4) develop a marketing plan with a calendar.
- 5) define and contrast external and internal marketing

## MARKETING CAMPAIGNS

**BEHAVIORAL OBJECTIVES:** The student will be able to;

- 1) recognize the importance of marketing to the success of a practice.
- 2) establish the 'Human Bond' between doctor and patient.
- 3) design a marketing plan utilizing the ABCs of Eyecare program

## CHAPTER 18 PATIENT COMMUNICATION

**Behavioral Objectives:** The student will be able to;

- 1) list and describe reasons why patient communication is important.
- 2) choose an image that is consistent with their identity
- 3) design an office interior to be consistent with their identity
- 4) choose a personal and staff appearance consistent with their identity
- 5) explain the importance of the receptionist to the success of an office.
- 6) train a receptionist on proper telephone techniques.
- 7) recognize and alleviate patient apprehension
- 8) convey the benefits of each testing procedure to the patient during the examination.
- 9) communicate findings and relate to recommended treatment options to fill patient's needs
- 10) develop printed materials to communicate with their patients
- 11) utilize audiovisual aids to communicate with their patients
- 12) develop follow-up protocol to communicate with patients
- 13) identify important factors in communicating with special patient populations

## CHAPTER 19 INTERPROFESSIONAL RELATIONS

**Behavioral Objective;** The student will be able to;

- 1) develop a marketing plan to increase referrals from primary care physicians
- 2) encourage referrals from other health care providers
- 3) increase referrals from other optometrists

## CHAPTER 32 ESTATE PLANNING

**BEHAVIORAL OBJECTIVES:** The student will be able to;

- 1) describe the three components necessary for financial planning; investment, retirement, estate planning.
- 2) determine short, intermediate, long term goals and how to financially prepare for them.
- 3) understand the four levels of investment forum
- 4) understand the importance and methods of planning for secure and comfortable retirement
- 5) realize the necessity of developing a proper will to protect your heirs and beneficiaries.