

FLOW SHEET SIX
INSTRUCTIONAL DESIGN DOCUMENT
& COURSE BLUEPRINT



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Project Context

Fireside Eye Care encountered challenges with onboarding Optometric Technicians, as training was inconsistent. This resulted in difficulties transferring accurate information from patient files to Flow Sheets, which posed disruptions during patient appointments.

The Flow Sheet is a critical task for Optometric Technicians and is heavily relied upon by optometrists. It provides quick access to vital patient details such as the date of the last comprehensive and intermediate exams, doctor's notes, current contact prescriptions, ocular testing results, and the most recent dilation information.

After consulting with Fireside Eyecare's owner/lead doctor and currently employed optometric technicians, it was determined that implementing an online training course would streamline and improve the efficiency of completing a Flow Sheet. This online course would enable technicians to undergo training independently in a single session, ensuring they are prepared to fill out patient Flow Sheets within the initial days of onboarding.

This course is Level 1 of a three-level onboarding program.

Course Purpose

The course aims to equip Optometric Technicians with the skills to fill out a Flow Sheet efficiently. The training is structured around six steps, called the Flow Sheet Six. The objective is for new hires to master the Flow Sheet process within two days of their employment, utilizing the six-step Flow Sheet Six method.

End Objectives

- Level 1 Training Goal: New Optometric Technicians will efficiently and accurately complete a Flow Sheet within two days of training.

Project Requirements

- Cost: \$5676
- Delivered in HTML, then uploaded to Fireside Eye Care server
- Accessible on office workstations equipped with the ExamWriter software
- Timeline: eLearning will be built in 45 days
 - Start date: 07/15/2024 – 10/01/2024
- Standards: Accessible for learners, online learning

Learning Requirements

Audience Profile

- **Title:** Optometric Technician
- **Job Role:** Perform a variety of duties within the vision clinic, including:
 - Prepare and assist doctors in facilitating patient care.
 - Ensure the Flow Sheet is accurately completed before the patient's appointment.
 - Maintain optometrists' pre-test equipment.
- **Demographics:**
 - Age range: 22-40 years old
 - Education: Associate's degree or currently taking online classes towards Bachelor's degree, very comfortable with social media and technology
 - Gender: Female
- **Needs:**
 - Completing a Flow Sheet efficiently and accurately. Enhancing and standardizing Flow Sheet training to promote consistency in optometric technicians' skills.
- **Goals:**
 - New Optometric Technicians will efficiently and accurately complete a Flow Sheet within two days of training.
- **Challenges:**
 - Unfamiliarity with the field of optometry
 - Unfamiliarity with optometric terminology
- **Motivations:**
 - Drive to equip doctors with precise data for superior patient care.
 - Desire to advance to Level 2 training, encompassing patient care duties.
- **Expectations:**
 - Master the Flow Sheet Six method.
 - Equip doctors with accurate patient information during exams.

Course Objectives

Objectives:

By the end of this training, learners will be able to:

- Distinguish between a Comprehensive and an Intermediate Exam
- Identify and document the Recall Date and Doctor's Notes
- Identify and document the Last Eye Exam (LEE) and Impressions & Assessments
- Identify and document the Contact Lens Prescription
- Identify and document the Cover Test and Pupil Information
- Identify and document the Last Dilated Fundoscopic Exam (DFE)

Course Outline

Fireside Eye Care

Flow Sheet Six

Employees: Optometric Technicians

1. **Distinguish between Comprehensive and Intermediate Exams**
 - a. Identify the language used to distinguish between comprehensive and intermediate exams.
2. **Identify and Document Recall Date & Doctor's Notes**
 - a. Identify recall date
 - b. Document doctor's notes with standard terms and abbreviations used in optometry
3. **Identify and Document the Last Eye Exam (LEE) and Impressions and Assessments**
 - a. Document the last eye exam (LEE) from the most recent comprehensive exam
 - b. Document doctor's notes (found in Impression and Assessments) from intermediate exams prior to the most recent comprehensive exam, if necessary
4. **Identify and Document the Contact Lens Prescription**
 - a. Document contact lens script and contact lens brand to expedite contact lens fitting
5. **Identify and Document the Cover Test and Pupil information**
 - a. Document cover test information to use as a baseline for comparison
 - b. Document pupil measurements to use as a baseline for comparison
6. **Identify and Document the Last Dilated Fundoscopic Exam (DFE)**
 - a. Document the date of the most recent dilation

Instructional Strategy Overview

A. Introduction: Scene 1 (3m)

Outcome: The learner will understand the Flow Sheet, its use, and the importance of completing it efficiently and accurately prior to the patient appointment.

Storyline



Introduction

Slide 1.1: Title Page

Component: Text, image, music

- Title, eye exam image, and music.
- The learner clicks the start button to begin the course.

Slide 1.2: Setting the Scene

Component: Audio narration, video x2

- Video of an optometric technician scheduling an appointment
- Video of an optometric technician assisting a patient with glasses

Slide 1.3: Why Flow Sheets Are Important to Doctors

Component: Audio narration, video x2

- Video of an optometrist struggling to retrieve patient information on a computer
- Video of a patient waiting in the reception area

Storyline



Introduction, cont.

Slide 1.4: Objectives

Component: Audio narration, click to reveal, buttons

Numbered buttons (1-6) for the learner to click, revealing each step of Flow Sheet Six

Slide 1.5: Job Aid

Component: Audio narration, visual, scroll panel, music for exploration

- A scroll bar is provided to navigate the job aid easily.
- The learner is introduced to a button in the bottom right corner that opens a job aid lightbox, accessible throughout the course.

Slide 1.6: Flow Sheet Six

Component: Audio narration, visual, scroll panel, markers 2-6

- A scrollbar is provided to navigate the Flow Sheet easily.
- The learner clicks markers 2-6 to reveal documentation locations throughout the course. (Note: Marker 1 is omitted and explained in the course's audio narration.)

B. Activation (30s)

Outcome: The learner will be able to understand their role in the optometric exam.

Storyline



Activation

Slide 1.7: Knowledge Check

Component: Text, audio narration, three answer choice selections

- The learner will be posed with a question and three answer choices.
 - When does an eye exam begin?
 - When the diagnosis is presented
 - In the exam room with the doctor
 - Before seeing the doctor (correct answer)

Slides 1.8–1.13: Feedback

Component: Text, audio narration

- The learner will be given two attempts to select the correct answer.
- The learner receives feedback for each submission.

Slide 1.14: Optometric Technician Name Tag

Component: Audio narration, text entry

- The learner will be prompted to complete their name tag.
- The learner will click the "Continue" button to proceed to Scene 2.

C. Step 1: Distinguishing Between a Comprehensive or Intermediate Exam (1m)

Outcome: The learner will be able to distinguish between a comprehensive exam and an intermediate exam.

Storyline



Distinguishing Between a Comprehensive or Intermediate Exam Demonstration

Slide 2.1: Title Page

Component: Text with Image, Music

- Title, eye exam image, and music.
- The slide automatically advances after 4 seconds.

Slide 2.2: What is a Comprehensive Exam?

Component: Audio narration, text, video

- The components of a comprehensive exam are explained.
- Examples of comprehensive exams that may resonate with the learner's experience are highlighted.

Slide 2.3: What is an Intermediate Exam?

Component: Audio narration, text, video

- The components of an intermediate exam are explained.
- Examples of intermediate exams that may resonate with the learner's experience are highlighted.

D. Distinguishing Between a Comprehensive or Intermediate Exam Application (1m)

Outcome: The learner will be able to identify and distinguish between a comprehensive and an intermediate exam.

Storyline



Practice: Distinguishing Between a Comprehensive or Intermediate Exam

Slide 2.4: Is it a Comprehensive Exam or an Intermediate Exam?

Component: Audio narration, text, and image

- An online patient file example is posed to the learner.
 - “You open the online patient file. The first exam type is Adult Eye Health and Vision Examination. Is this exam a comprehensive or an intermediate exam?”
- The learner must click the button to decide if the file type is comprehensive or intermediate.

Component: Feedback layers x2

- Immediate correct and incorrect feedback is provided.

Storyline



Practice: Distinguishing Between a Comprehensive or Intermediate Exam, cont.

Slide 2.5: Is it a Comprehensive Exam or an Intermediate Exam?

Component: Audio Narration, text, image

- An online patient file example is posed to the learner.
 - “Mr. Jonas suddenly has developed a sensitivity to light. Would this exam be considered a comprehensive exam or an intermediate exam?”
- The learner must click the button to decide if the file type is comprehensive or intermediate.

Component: Feedback layers x2

Immediate correct and incorrect feedback is provided.

Storyline



Practice: Distinguishing Between a Comprehensive or Intermediate Exam, cont.

Slide 2.6: Is it a Comprehensive Exam or an Intermediate Exam?

Component: Audio narration, text, image

- An online patient file example is posed to the learner.
 - "Mrs. Larson has an appointment at 3:00 for a yearly exam. She indicates she has no changes in vision other than using her "readers" more often. Is this a comprehensive or an intermediate exam?"
- The learner must click the button to decide if the file type is comprehensive or intermediate.

Component: Feedback layers x2

- Immediate correct and incorrect feedback is provided.

Slide 2.7: Instructional Slide

Component: Text, image, button

- This slide directs the learner to gather a blank Flow Sheet and the Flow Sheet Six to proceed with the course.

E. Step 2: Identify and Document Recall Date & Doctor's Notes Demonstration (2m 45s)

Outcome: The learner will be able to identify and document the recall date & doctor's notes.

Storyline



Step 2: Identify and Document Recall Date & Doctor's Notes Demonstration

Slide 3.1: Title Page

Component: Text, image, music

- Title, eye exam image, and music. The slide automatically advances after 4 seconds.

Slide 3.2: Patient File

Component: Image, text, animation, layer x1

- The patient file is designed to closely replicate the actual online system used at Fireside Eye Care. Extensive research was undertaken to choose the most effective color combinations and fonts, ensuring a smooth transition from training to real-world application.
- File tabs are highlighted with animations.
- The Flow Sheet Six job aid button animates into position in the bottom right-hand corner.

Storyline



Step 2: Identify and Document Recall Date & Doctor's Notes Demonstration, cont.

Slide 3.3: Finding the Recall Date & Doctor's Notes

Component: Image, text, animation

- The learner is guided to locate the most recent exam by checking the exam number at the top of the file, which is highlighted with animation.
- The learner is instructed to click on the **Surg - Plan - Mgmt tab layer**, which is frequently used to access relevant information.
- The learner is instructed to scroll down to the **Patient Management** section.
- They are then guided to the **Orders** section, where they will note the date and necessary documentation to be recorded on the Flow Sheet. Key items are highlighted with animations for clarity.
- The learner is instructed to click the file icon when ready to document onto the Flow Sheet.

Storyline



Step 2: Identify and Document Recall Date & Doctor's Notes Demonstration, cont.

Slide 3.4: Flow Sheet

Component: Image, text, animation

- Upon clicking the Flow Sheet, the learner is guided to locate marker #2 on their own Flow Sheet.
- The learner locates the corresponding marker on the online Flow Sheet.
- The documentation is read aloud and enhanced with wipe animation.
- While the documentation is being read aloud, the learner is able to observe or independently document alongside the trainer using their paper Flow Sheet.
- Once the online documentation is complete, explanations for abbreviations and terminology are provided.

Component: Job Aid

- **The Flow Sheet Six:** A learner resource outlining the six steps for completing the Flow Sheet, including detailed clarifications for each step.

F. Step 3: Identify and Document the Last Eye Exam (LEE) and Impressions & Assessments Demonstration (2m 40s)

Outcome: The learner will be able to identify and document the last eye exam and/or document impressions and assessments.

Storyline



Step 3: Identify and Document the Last Eye Exam (LEE) and Impressions & Assessments Demonstration

Slide 4.1: Title Page

Component: Text, image, music

- Title, eye exam image, and music. The slide automatically advances after 4 seconds.

Slide 4.2: Patient File

Component: Image, text, animation, layer x2

- The learner is reminded how to locate the most recent exam using the exam numbers and to ensure it is the most comprehensive exam by applying previous knowledge from the knowledge check.
- The learner is guided to the **Chief Complaint** tab layer.
- The learner is instructed to identify the keywords **ADULT EYE HEALTH AND VISION EXAM** in the section to confirm the exam is comprehensive.
- To reinforce prior learning, the learner is asked which tab is frequently used for information retrieval and is directed to click the **Surg - Plan - Mgmt** tab layer, which is highlighted with a speech bubble.

Storyline



Step 3: Identify and Document the Last Eye Exam (LEE) and Impressions & Assessments Demonstration, cont.

Slide 4.3: Flow Sheet

Component: Image, text, animation

- Upon clicking the Flow Sheet, the learner is guided to locate marker #3 on their own Flow Sheet.
- The learner locates the corresponding marker on the online Flow Sheet.
- The documentation is read aloud and enhanced with wipe animation.
- While the documentation is being read aloud, the learner is able to observe or independently document alongside the trainer using their paper Flow Sheet.
- Once the online documentation is complete, explanations are provided for abbreviations and terminology.

Component: Job Aid

- **The Flow Sheet Six:** A learner resource outlining the six steps for completing the Flow Sheet, including detailed clarifications for each step.

G. Application: Steps 2 – 4

Outcome: The learner will be able to correctly order the steps of finding the last eye exam or LEE. (Finding the LEE incorporates the skills learned in all three steps.)

Storyline



Application: Steps 1 – 3

Slide 5.1: Title Page

Component: Text, image, music

- Title, the image of a binder of learning materials, and music. The slide automatically advances after 4 seconds.

Slide 5.2: Application Activity

Component: Sequencing Drag and Drop Activity

- The learner is guided to sequence the steps to locate the LEE correctly.

Component: Feedback Layer

- The learner receives feedback after each submission.
- Two submission attempts are allowed per task.
- Checkmarks appear on correct answers after submission, guiding the learner toward the right choices.

Component: Job Aid

- **The Flow Sheet Six:** A learner resource outlining the six steps for completing the Flow Sheet, including detailed clarifications for each step.

H. Step 4: Identify and Document the Contact Lens Prescriptions Demonstration

Outcome: The learner will be able to identify and document the contact lens prescription.

Storyline



Step 4: Identify and Document the Contact Lens Prescriptions Demonstration

Slide 6.1: Title Page

Component: Text, image, music

- Title, eye exam image, and music. The slide automatically advances after 4 seconds.

Slide 6.2: Patient File

Component: Image, text, animation, layer x2

- The learner is reminded how to locate the most recent exam using the exam numbers and to ensure it is the most comprehensive exam by applying previous knowledge from the knowledge check.
- The learner is guided to the **Chief Complaint** tab layer.
- The learner is instructed to identify the keywords **ADULT EYE HEALTH AND VISION EXAM** in the **Reason for Visit** section to confirm that the exam is comprehensive.
- The learner is asked, "Using the tabs, where would you find a contact lens prescription? If you guessed the **Vision - Rx** tab, you're correct!"
- The learner is directed to click the **Vision - Rx** tab layer, which is highlighted with a speech bubble.

Storyline



Step 4: Identify and Document the Contact Lens Prescriptions Demonstration, cont.

Slide 6.3: Flow Sheet

Component: Image, text, animation

- Upon clicking the Flow Sheet, the learner is guided to locate marker #4 on their own Flow Sheet.
- The learner locates the corresponding marker on the online Flow Sheet.
- The documentation is read aloud and enhanced with wipe animation.
- While the documentation is being read aloud, the learner is able to observe or independently document alongside the trainer using their paper Flow Sheet.
- Once the online documentation is complete, explanations for abbreviations and terminology are provided.

Component: Job Aid

- **The Flow Sheet Six:** A learner resource outlining the six steps for completing the Flow Sheet, including detailed clarifications for each step.

I. Step 5: Identify and Document the Cover Test and Pupil Measurements Demonstration

Outcome: The learner will be able to identify and document the cover test and pupil measurement.

Storyline



Step 5: Identify and Document the Cover Test and Pupil Measurement

Slide 7.1: Title Page

Component: Text, image, music

- Title, eye exam image, and music. The slide automatically advances after 4 seconds.

Slide 7.2: Patient File

Component: Image, text, animation, layer x3

- The learner is reminded how to locate the most recent exam using the exam numbers and to ensure it is the most comprehensive exam by applying previous knowledge from the knowledge check.
- The learner is guided to the **Chief Complaint** tab layer.
- The learner is instructed to identify the keywords **ADULT EYE HEALTH AND VISION EXAM** in the **Reason for Visit** section to confirm that the exam is comprehensive.
- The learner is provided with a summary of the cover test procedure and the relationship between pupil measurements and the cover test. They are asked, "We are still discussing patient vision when documenting the results of the cover test. Which tab might one look under to find the results of the cover test? If you guessed the **Vision/Rx** tab, you are correct."

Storyline



Step 5: Identify and Document the Cover Test and Pupil Measurement, cont.

- The learner is directed to click the **Vision - Rx** tab layer, which is highlighted with a speech bubble.
- The learner is guided to the three tabs on the left side of the screen.
- They observe that the **Binocular** tab is selected, indicated by its gray highlight.
- The learner is directed to the left side of the screen, where the **Cover Test--Near** box is highlighted.
- The learner is instructed to check the **Horz** section of the box. If the word **ORTHO** is present, they will enter a zero (**0**) value on the **Bin. CT** line on the Flow Sheet (Marker 5).
 - The learner is notified if the **Horz** section box is blank; this indicates that no cover test results are available for the patient. Therefore, pupil measurements will also not be available. The learner should proceed to the next step in Flow Sheet Six.
- The learner is then instructed to obtain the pupil measurements by clicking the **Exam - Special Test** tab.
- The learner will scroll to the **External Exam** section, looking for doctor notes that mention cover testing, which will include two numbers separated by a hyphen, such as 6-3 or 7-7. These numbers should be documented on the **Pupil** line of the Flow Sheet (Marker 5).
- After completing their documentation, the learner will click the file icon to verify that the documentation on their own Flow Sheet matches the documentation on the online Flow Sheet.
- The learner will verify:
 - The **Bin. CT.** line for the cover test value,
 - The **Pupil** line for the correct set of hyphenated numbers.

Storyline



Step 5: Identify and Document the Cover Test and Pupil Measurement, cont.

Slide 7.3: Flow Sheet

Component: Image, text, animation

- The learner independently transfers the information obtained from the online patient file to the **Bin. CT.** line and the **Pupil** line on their own Flow Sheet.
- Both locations are labeled as marker 5.

Component: Job Aid

- **The Flow Sheet Six:** A learner resource outlining the six steps for completing the Flow Sheet, including detailed clarifications for each step.

J. Step 6: Identify and Document Last Dilated Fundoscopic Exam (DFE) Date Demonstration (45s)

Outcome: The learner will be able to identify and document the date of the last dilated fundoscopic exam.

Storyline



Step 6: Identify and Document the Last Dilated Fundoscopic Exam (DFE) Date

Slide 8.1: Title Page

Component: Text, image, music

- Title, eye exam image, and music. The slide automatically advances after 4 seconds.

Slide 8.2: Patient File

Component: Image, text, animation, layer x1

To identify the last DFE:

- The learner will be instructed to search for the most recent dilation orders for the patient.
- The date of the exam on which the order was entered is the date of the last DFE.
- The learner will be reminded that the exam does NOT need to be comprehensive; only the most recent dilation results are required.

Storyline



Step 6: Identify and Document the Last Dilated Fundoscopic Exam (DFE) Date, cont.

To locate the dilation orders:

- The learner will be directed to search **Exam – Special Test** tab layer, starting with the most recent exam.
- The learner will scroll to the **Examination** section to search for **DILATION ORDERS**.
- The learner will continue working backward through exams until the dilation orders are found.
 - If no dilation orders are found, the patient has not had a dilation. In this case, one would leave the **Last DFE** line blank.
- After locating the dilation orders, note the exam date from the top of the exam. This date will be documented as the **Last DFE** on the appropriate line of the learner's Flow Sheet (Marker 6).

Slide 8.2: Patient File

- After completing their documentation, the learner will click the file icon to verify that the documentation on their own Flow Sheet matches the documentation on the online Flow Sheet.
- The learner will verify:
 - The **Last DFE** line for the correct date.

Storyline



Step 6: Identify and Document the Last Dilated Fundoscopic Exam (DFE) Date, cont.

Slide 8.3: Flow Sheet

Component: Image, text, animation

- The learner independently documents the date of the most recent dilation on the **Last DFE** line for this step. The location is labeled as marker 6. Documentation will be provided upon opening the Flow Sheet.
- Once the online documentation is complete, explanations for abbreviations and terminology are provided.

Component: Job Aid

- **The Flow Sheet Six:** A learner resource outlining the six steps for completing the Flow Sheet, including detailed clarifications for each step.

K. Application: Steps 4 – 6 (1m)

Outcome: The learner will be able to correctly identify the steps needed to obtain the contact lens prescription, the cover test and pupil measurement, and the last dilated fundoscopic exam date from an online patient file.

Storyline



Application: Steps 4 – 6

Slide 9.1: Steps 4 – 6 Application

Component: Pick Many Assessment x3

- Title
- Image of technician
- Correct and incorrect steps listed for identifying and documenting the contact lens prescription
- Identifying and documenting the cover test and pupil measurement
- Identifying and documenting the last dilated fundoscopic exam date.

Storyline



Application: Steps 4 – 6, cont.

Slide 9.2: Application Activity – Contact Lens Prescription

Component: Pick Many Assessment (correct answers are bolded)

- The learner will choose the necessary steps to identify and document the contact lens prescription.
 - Locate the most recent exam.
 - **Locate the most recent comprehensive exam.**
 - Check the exam number to verify if the exam is comprehensive.
 - **Click the Vision – Rx tab to find the contact lens prescription.**
 - Make sure the binocular tab is gray to find the contact lens prescription.
 - **Make sure the contact tab is gray to find the contact lens prescription.**
 - **Document the script value for the right eye, the left eye, and the brand of contacts on the Flow Sheet.**

Storyline



Application: Steps 4 – 6, cont.

Slide 9.3: Application Activity – Cover Test and Pupil Measurement (correct answers are bolded)

Component: Pick Many Assessment

- The learner will choose the necessary steps to identify and document the cover test and pupil measurement.
 - **Click the Chief Complaint tab, then the Reason for Visit section, then look for Adult Eye Health and Vision Exam to verify a comprehensive exam.**
 - Check the exam number to verify if the exam is comprehensive.
 - Click the Patient Hx – ROS to obtain the cover test information.
 - **Make sure the binocular tab is gray to find the cover test information.**
 - **Click the Exam – Special Test tab to find the pupil measurements.**
 - Click the Surgery – Plan – Mgmt tab to find the pupil measurements.
 - **Look under External Exam and document the number zero.**

Storyline



Application: Steps 4 – 6, cont.

Slide 9.4: Application Activity – Last DFE

Component: Pick Many Assessment (correct answers are bolded)

- The learner will choose the necessary steps to identify and document the last dilated fundoscopic exam.
 - **If no dilation orders are found, this indicates the patient has not had a dilation.**
 - Click the Patient Hx – ROS to obtain the dilation order information.
 - **In the Last DFE line space on the Flow Sheet, document the date of the exam the dilation orders were entered.**
 - **Locate the most recent exam having dilation orders.**
 - Make sure the binocular tab is gray to find the cover test information.
 - **Click the Exam – Special Test tab under Examination to find the Dilation Orders.**
 - Click the Exam – Special Test tab to find the Dilation date.

Component: Feedback Layer

- The learner receives feedback for each submission. The learner is allowed two attempts to submit.

Component: Job Aid

- **The Flow Sheet Six:** A learner resource outlining the six steps for completing the Flow Sheet, including detailed clarifications for each step.

L. Final Demonstration: Steps 1–Six of the Flow Sheet Six (30s)

Outcome: The learner will be able to understand the six-step process outlined in Flow Sheet Six.

Vyond



Steps 1–6 Final Demonstration

Component: Text and Video

- The Flow Sheet Six is demonstrated in an animated video.

Component: Job Aid

- **The Flow Sheet Six:** A learner resource outlining the six steps for completing the Flow Sheet, including detailed clarifications for each step.

M. Final Application: (10 minutes)

Outcome: The learner will efficiently and accurately complete a Flow Sheet.

Storyline



Final Application

Component: Text

- The application is introduced.

Component: Text, image, multiple choice questions x10

- The learner will evaluate a section of an online patient file.
- The learner will choose the most accurate documentation from the three choices provided.

Component: Feedback

- After each application, the learner will receive feedback.

Component: Job Aid

- **The Flow Sheet Six:** A learner resource outlining the six steps for completing the Flow Sheet, including detailed clarifications for each step.

N. Real World Application: Steps 1–Six of the Flow Sheet Six (10m)

Outcome: The learner will be able to efficiently and accurately complete a Flow Sheet without guidance for a current patient file following the Flow Sheet Six process.

Online Patient File



Real World Application (No Guidance)

Objective:

- The learner will be able to efficiently and accurately complete a Flow Sheet independently for a recently seen patient by following the Flow Sheet Six process.

Supplies:

The learner will need:

- A laptop
- Access to ExamWriter
- A file folder containing the Flow Sheet of a recently seen patient
- Two blank Flow Sheets
- 1 highlighter
- A pen or pencil
- Access to the Flow Sheet Six

Online Patient File



Real World Application (No Guidance), cont.

Procedures:

- An experienced tech will select a patient of Fireside Eye Care, preferably a patient that has been seen within the last few weeks.
- An evaluation meeting will be scheduled later the same afternoon, or the next day to discuss the following assessment and go over results.
- The learner will be instructed to complete a Flow Sheet for the selected patient using the online patient file.
- The learner will then receive the file folder containing the Flow Sheet to be used as an answer key after completing the first attempt at the assessment.
- The learner will compare their Flow Sheet to the completed Flow Sheet in the file folder, highlighting incorrect or confusing information on their own Flow Sheet.
- Using the extra Flow Sheet, they may repeat the assessment a second time, evaluating and correcting the errors from the first attempt.
- They will bring both Flow Sheets to the evaluation meeting with the experienced tech.

Online Patient File



Real World Application (No Guidance), cont.

Evaluation:

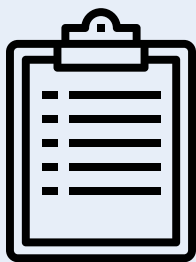
- At the follow-up meeting, the experienced tech and the new tech will go over each section of the Flow Sheet, comparing the information from the online patient file to the information entered on the learner's Flow Sheet.
- The experienced tech will provide verbal feedback to the new tech, making suggestions and improvements as necessary. Explanations will be provided for any abbreviations and terminology not previously discussed.
- The experienced tech will commend the tech on their correct documentation and present them with their Level 1 Certificate of Completion.

Component: Job Aid

- **The Flow Sheet Six:** A learner resource outlining the six steps for completing the Flow Sheet, including detailed clarifications for each step.

OTHER MATERIALS

Job Aid



Course Key Takeaways

- **The Flow Sheet Six:** A learner resource outlining the six steps for completing the Flow Sheet, including detailed clarifications for each step.

Project Sign-Off

Printed Name

Role

Signature

Printed Name

Role

Signature

Printed Name

Role

Signature