Defining the Scope of Technician Practice in Your Office

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James is a skilled technician working in a busy ophthalmology practice. He frequently assists in the operating room and thus is familiar with cataract surgery and able to discuss treatment options confidently. Although he has never told the ophthalmologists he works with about these discussions, he assumes it is acceptable, as they “trust him” and patients seem to like having their questions answered by him. He completes testing with a patient who seems an ideal candidate for surgery and so, before the doctor reviews test results or meets with “Linda,” James tells her that cataracts are to blame for her vision loss and that she is an ideal candidate for cataract surgery to improve her vision. Linda is very relieved as she worried she was going blind.

When the physician enters the room, Linda immediately begins to talk about scheduling her surgery. The physician is surprised and a bit caught off guard as Linda’s cataracts are mild and her loss of vision turns out to be due to macular degeneration. Discussing macular degeneration with a patient is never easy; however, the discussion is now far more difficult—and confusing—for the patient due to the misinformation James provided. James, of course, feels terrible—he was only trying to help and it can be difficult for technicians to understand where the line is between fully preparing patients for meeting with the physician and overstepping their role.

Define roles
As this example illustrates, it is a good idea to periodically review the scope of practice with technical staff. Here’s how JCAHPO defines a technician’s role:

… to assist the ophthalmologist by collecting data, administering treatment
Before you have such conversations—simple sharing of test results versus diagnosis or treatment planning—must be made abundantly clear. Once the physician has made a diagnosis and has discussed treatment options with the patient, the technician may play a vital role. In many practices the technician has the opportunity to spend more time with the patient than the physician can and so a skilled technician may clarify information provided by the physician, answer questions, provide written materials, and help with coordination of care.

Put it in writing
Ideally all physicians in a practice will come to a common agreement with regard to information sharing as this will make it easier to maintain consistency. However such consensus may be difficult to achieve in large or diverse practices. Develop clear, written protocols that describe what information can—and cannot—be shared with patients and the specific conditions under which this information may be shared. Be sure to develop protocols for telephone and secure emails as well—and include limits of confidentiality in these protocols. If all technicians are consistent in the level of information shared, patients will quickly learn what to expect from all staff members and there will be fewer disappointments and unmet expectations.

Cited

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