



Winning at Patient Retention with the Next Eye Exam

There are at least 7 opportunities in the patient experience when you, your staff or your retail partners can educate your patients on the “whys” of the annual eye exam. When scheduling the Next Eye Exam, always reinforce the specific reasons why you want to see the patient again.

When scheduling the exam (Staff)

- Thank the patient for scheduling her eye exam and remind her that the doctor recommends annual eye exams for specific health reasons.

When scheduling the exam

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When welcoming the patient (Staff)

- Ask the patient to sign the Patient Information Release Form (PIRF) so she can receive appointment reminders and retail offers.
- Remind the patient that the doctor recommends annual eye exams for specific health reasons.

During check-in

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During the exam (Doctor)

- At the beginning of the exam, commend the patient if she has returned in 12-14 months.
- If she has a health condition, such as diabetes, or a family medical history of health conditions, remind her why regular eye exams are so important.
- During the exam, educate the patient that small changes in vision that are not readily apparent may still affect comfort and quality of life.
- Based on your evaluation, at the end of the exam, recommend a Next Eye Exam time frame to the patient and share your recommendation with anyone who may need to help schedule the exam.

During case history & pre-test

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In the exam lane

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Next Eye Exams should only be made with the patient's permission. Let the patient know that she'll receive a reminder and be able to reschedule if needed. You'll be most successful if you provide a tangible reminder of the appointment by inserting a reminder card in the Health & Wellness report.

At the end of the exam

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At check-out (Staff)

- Check the patient out using TAB.
- Schedule the patient for the NEE in TAB and provide an appointment card or document the appointment time on a business card.

At check-out

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At dispense (Retail Associate)

- Encourage your retail partners to remind the patient of the importance of the annual eye exam when she picks up her eyewear. A friendly, “See you next year for your annual eye exam,” can be effective.

During dispense

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