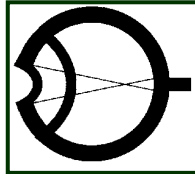


**Hudson Eye Physicians  
&  
Surgeons, LLC**



600 Pavonia Avenue  
6th Floor  
Jersey City, New Jersey 07306  
201 963-3937

**Office Manual**

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**I. GENERAL OFFICE INFORMATION**

**A. Mailing Address**

Hudson Eye Physicians and Surgeons  
600 Pavonia Avenue 6th Floor  
Jersey City, New Jersey 07306

**B. Telephone Numbers**

**Patient #'s**

201 963 3937  
201 963 9216

**Administrative**

201-963 5846  
201-963-6241

**Surgical #**

201 792 2020

**Fax #**

201 963 8823

**Pavonia Optical**

201 963 9187

**Millburn Office**

**Patient #s**

973-912-9100

**Administrative**

**Millburn Optical**

**C. Office Hours**

1. Monday through Saturday, with varying schedule as necessary.

**D. The office is closed on the following holidays:**

1. New Years Day
2. Memorial Day
3. July 4th Holiday
4. Labor Day
5. Thanksgiving Day
6. Christmas Day

**E. Federal Employer I.D.# 20-0298999**

**F. Office Accountant**

Bederson & Company  
405 Northfield Avenue  
West Orange, New Jersey 07052 3003

Steven Bortnick, C.P.A.  
Phone # 732 736 3333  
Fax # 732 736 3367

**G. Actuarial Consultant**

Bederson and Company  
405 Northfield Avenue  
West Orange, New Jersey 07052-3003

Steven Bortnick, CPA  
Phone # 973-736-3333  
Fax # 973-736-3367

## II. GENERAL EMPLOYMENT POLICIES FOR HEPS

### A. Vacation

#### 1. New Employees

90 days "starting" period no vacation / sick day/benefits

After 90 days

Will accumulate 1 vacation day for every month until the end of the calendar year (up to 5 days).

For the following calendar year

5 vacation days.

Beginning **2nd** full calendar year

10 vacation days

3 <sup>rd</sup> calendar yr	11 days	8 <sup>th</sup> calendar yr	16 days
4 <sup>th</sup> calendar yr	12 days	9 <sup>th</sup> calendar yr	17 days
5 <sup>th</sup> calendar yr	13 days	10 <sup>th</sup> calendar yr	18 days
6 <sup>th</sup> calendar yr	14 days	11 <sup>th</sup> calendar yr	19 days
7 <sup>th</sup> calendar yr	15 days	12 <sup>th</sup> calendar yr	20 days

Beginning **20<sup>th</sup>** full calendar year

25 vacation days

- Vacation days **must** be put in the vacation book 2 weeks in advance of the vacation. **Days taken without booking 2 weeks in advance are not permitted without special permission from the office manager or Partner, and can be grounds for termination**
- Vacation days must be taken in the same calendar year. No carryover vacation days to the following year.
- **Summer and Christmas season vacation weeks are encouraged or other times when one or more doctors are scheduled to be out of office.**
- **Vacations will be listed in the Days Off Calendar, available on the network under Public Folders. Please check this prior to asking for days off.**
- **HEPS will purchase back vacation time ONLY in Full day units up to a maximum of 5 days. Pay rate will be standard hourly rate.**

### B. Sick Days

- \*Employees will be allowed 3 sick occurrences per year. If more than 1 consecutive day is taken a note from your personal physician will be required.
- 3 consecutive days will be the limit of an occurrence.
- If a ½ day is taken for a doctor appointment, it will be considered ½ of an occurrence.

\* After 90 days of employment

### ***C. Personal Days***

- 2 Personal days per year.
- Personal days are to be used for “personal emergencies” such as a death in the family, or for a sick family member. They are NOT vacation days.
- **Personal days may not be consecutive with either sick days or vacation days.**
- Personal days must be taken in the same calendar year.

### ***D. Part time Employees***

**1. Vacation days/sick days accumulated per units of 200 hours of work at rate of**

- 1 day per unit for years one through 4.
- 1.5 days per unit for years 5 through 9.
- 2 days per unit after 10 years.

### ***E. Employees with similar positions may not take vacations together.***

Specifically, the following groups of employees should be careful not to schedule vacation at the same time.

#### **Jersey City Office**

- Receptionists
- **Administrative Personnel**
  - **Office Manager**
  - **Administrative Secretary**
  - **Billing Manager**
  - **Billing Staff**
  - **Ophthalmic Technicians**

**Millburn Office** – unless cross coverage arranged by Office Manager

- **Receptionists**
- **Technicians**

### ***F. Unpaid days Off***

**HEPS policy does not allow for unpaid time off.** If however, there are extenuating circumstances, please discuss this with the office manager.

### **G. Holidays – Full Time Staff Only**

- New Years Day
- Martin Luther King Day / Presidents Day\*\*
- Good Friday\*\*
- Memorial Day
- July 4<sup>th</sup>
- Labor Day
- Thanksgiving
- Christmas Day

\*\* Everyone is expected to work on Martin Luther King Day/ Presidents Day and Good Friday but they can take an additional single holiday of their choice in lieu of each day. (a total of two days, not three)

### **H. Illness**

An occurrence should be called in personally **only** to the office manager, administrative secretary or doctor. 1/2 sick days are encouraged for important medical visits e.g. long hospital tests, extensive dental work.

If more than 1 day is taken on adjacent days, a note from your personal physician is required.

### III. Employment

#### A. *HEPS is an Equal Opportunity Employer.*

1. Applicants for positions are expected to meet the office requirements and will be interviewed by staff members.

#### B. *Employment Hours*

##### 1. Attendance and Punctuality

- a) Continued lateness and absenteeism are grounds for termination

### IV. OFFICE HOURS

*As mentioned above, hours will vary with the needs of our patients, as determined by the partners and managers.* Generally hours will not begin before 8 AM and the last scheduled patient will not be after 6 PM on weekdays. On Saturday the last scheduled appointment will be 12:30.

It is understood that scheduled reception staff and technician staff will be in so that office operations can begin as scheduled

**As we are a medical facility with primary responsibility for patient care, it is understood that we may finish later than scheduled on any given day.**

#### **Administrative secretary**

Monday - Friday: 8:00 AM - 4:00 PM

#### **Surgical secretary**

Monday – Friday: 9:00 AM – 5:00 PM

#### **Front desk receptionists**

- Schedules will be adjusted on an individual basis to meet office needs, within the parameters mentioned above.
- Saturday schedules currently necessitate fewer employees. The Saturday responsibilities will generally be rotated according to office needs, with front reception schedules posted at least 1 month in advance.
- Saturdays will be either paid as overtime (assuming a previous 40 hour week) or we will provide a compensatory day off at our discretion.

#### **Technicians**

- Technician hours will match that of scheduled patients.

- Technicians that work a “late night” (as defined by the doctors’ last scheduled patient being at 6 PM) will accrue a minimum of 2 hours of overtime.
- The technicians will be responsible for making the Saturday coverage schedule, six months in advance, having two technicians scheduled each Saturday
- Technicians who work Saturdays will accrue a minimum of 4 hours of work. This will be paid as overtime if the technician has otherwise worked a 40 hour week.
- Technicians may arrange rotating coverage for days when hours extend beyond the normal finish time (either mid-day or at end of day).

## v. Health Policy

### ***A. Health insurance is a benefit that begins on the 91-st day of employment.***

Policy Name: Aetna Health

Contact Information: **Robert D. Parisi**  
**Olympic Agency**  
**973-669-3150**

- Employees who elect health insurance coverage will contribute 8% for health insurance premium. It will be deducted directly from their paycheck.

## vi. Payroll

- Payroll checks are distributed biweekly on the Wednesday following the 14-day work period. If the Wednesday falls on a holiday, the checks will be distributed on the last working day prior to that holiday.
- Direct Deposit is available to anyone wishing to sign up and is encouraged.

## vii. Dress Code

- During patient hours all employees shall appear neat, well groomed and exude good personal hygiene.
- At all times, blue jeans and sweat pants are prohibited
- Employees will wear scrub outfits, both tops and bottoms.
- Scrubs will be ordered through our supplier and all tops will have the Hudson Eye Logo embroidered on the right breast area and the employee’s first name on the left breast area. HEPS will pay the cost of embroidery.
- If, in unusual circumstances, an employee must wear business or dressy attire, prior approval from the manager or one of the partners must be given. In this event, they will wear a white lab coat over the street clothes while in patient care areas.

## **VIII. Personal Use of the Telephone Employees**

Employees may use the office telephone system for outgoing local calls **at designated hours**. Non-emergency calls should be made prior to starting office hours, on an employees lunch hour and anytime after office hours. It is understood that “emergency” telephone calls may need to be made during hours.

It is understood that there are times when family or friends must reach you during the day. This should be RARE, SHORT and limited to URGENT SITUATIONS. When these calls have to be made, the individual should be instructed to call in on the private line (963-5846). Incoming calls tie up the phone lines and keep you from your work, they should be kept to an absolute minimum.

### **VOICE MAIL**

Many employees are provided access to voice mail on the HEPS telephone system.

All messages created, sent or received are the property of HEPS, and all uses of the Practice’s voice mail system are solely for business purposes. Voice mail may not be used in violation of the HEPS anti-discrimination policy or any other policy, and any use of the system to send messages with sexual content or other offensive language is prohibited. Employees are prohibited from accessing voice mail messages that are intended for others without permission from his/her supervisor. Violations of these policies may be grounds for discipline up to and including termination.

HEPS reserves the right to monitor all voice mail; consequently there should be no expectation of privacy in the voice mails sent or received.

### **AUDIO/VIDEO/COMPUTER MONITORING**

In addition to monitoring telephone calls, the Practice reserves the right to monitor employee activity by means of audio or video recording techniques. The Practice further reserves the right to monitor an employee's computer usage. These procedures are required at times to ensure the integrity of our operations, compliance with all Practice rules and regulations, for patient safety and for quality control purposes. All audio/video/computer monitoring of employee activity must be approved by Dr Constad. Employees may not, on their own initiative, electronically record the actions or conversations of other employees, patients, guests or those with whom the Practice has a business relationship.

**This telephone policy is critical to the proper functioning of the office.**

## IX. Use of the Office Computers and Network

**A. Computers:** Are to be used for work related jobs. They are not to be used for personal shopping, web exploring, personal e-mail, etc.

**B. Network Logon:** You will be assigned a Network Logon, and personal logons for the office computer system, along with an office e-mail account.

***Each employee is responsible for all work, and account access that is performed under your logins. DO NOT SHARE YOUR LOGIN WITH ANYONE. Because inappropriate use of your account can violate HIPAA regulations, it is grounds for termination.*** If you feel your password has been compromised, please change it or talk to the Office Manager, or Partner immediately.

### INTERNET ACCESS

Employees may be provided access to the Internet. Use of HEPS facilities for internet access is solely for business purposes and that the Practice reserves the right to limit or prohibit workplace Internet access by any and all of its employees at its sole discretion. Use of the Internet connection for any purpose other than researching and gathering information directly related to the Practice's business is strictly prohibited. The Internet may not be used to solicit others for, including but not limited to, commercial ventures, religious or political causes, outside organizations or any other non-business matters.

Internet access provided to employees in the workplace is the property of the Practice. Employees should be aware that workplace Internet access is not confidential and that the Practice reserves the right to monitor any and all of their Internet usage while in the workplace, whether during business hours or not. Monitoring of employee Internet usage may be random, periodic or continuous.

Downloading files and/or applications from Internet places the Practice's computer network at risk of infection by computer viruses. Employees must consult with the Practice's administration prior to downloading any files and/or applications.

The Practice employees are strictly prohibited from posting to, and/or participating in any type of bulletin boards, discussion groups, chat rooms or any other type of electronic forum that requires the input of text or images from their workplace computers; unless the employee is doing so for legitimate work-related reasons.

Browsing to websites with racist or sexual themes is expressly prohibited.

**Violations of these policies may be grounds for discipline up to and including termination.**

### WORKPLACE SEARCHES

To protect the property and to ensure the safety of employees, patients and the Practice, the Practice reserves the right to conduct personal searches consistent with state and federal law, and to inspect any packages, parcels, purses, handbags, brief cases, lunch boxes or any other possessions or articles carried to or from the Practice's property. In addition, the Practice reserves the right to search any employee's office, desk, files, lockers, equipment or any other

area or article on the premises. In this regard, it should be noted that all offices, desks, files, lockers, equipment, etc are the property of the Practice, and are issued for the use of employees only during their employment. Inspection may be conducted at any time at the discretion of the Practice. Searches will be conducted with concern of each employee's privacy, subject to the Practice's need to enforce this policy.

Persons entering the premises who refuse to cooperate in an inspection conducted pursuant to this policy may not be permitted to enter the premises. Employees working on or entering or leaving the premises who refuse to cooperate in an inspection, as well as employees who, after the inspection, are believed to be in possession of stolen property or illegal drugs, will be subject to disciplinary action, up to and including discharge, and possible legal action.

## **x. Lunchroom Policy**

- The staff will be responsible, on a rotational basis, to care for the dishwasher daily and be responsible for being sure the kitchen is left clean at the end of the day – coffee maker turned off, grounds emptied, table and counters cleaned.
- HEPS requests that food not be brought out of the kitchen area under any circumstance during office hours. Any beverages should not be kept in examining areas (OSHA regulations), should not be in patient areas and should be kept away from patients in non examining areas.
- While the lunch "period" is scheduled between 11:30 AM and 1:30 PM, and while HEPS provides a half for lunch for each employee, it is understood that because of the nature of providing health care to sick people, emergencies can arise frequently and the lunch schedule may be disrupted. Because of this, there will be a rotation schedule to make the lunch hour as convenient for most people most of the time.

## **xi. Shared Responsibilities**

When an employee is absent it is expected that all office personnel share the responsibility of the absent employee.

## **xii. Profit Sharing Plan**

Hudson Eye Physicians and Surgeons provide a profit sharing plan for all of its employees on an equitable basis. The contributions are made completely (100%) by HEPS for the benefit of the employee. There is also a 401K option for which HEPS will match 1% of the employee's contribution. The complete details and vesting schedule of the plan are available in a separate manual maintained by the office. This manual with its legal description and outline of the plan is available for review by any employee during normal working hours. Photocopied portions will be made available upon request.

Actuary for the Plan:  
Steven Bortnick, CPA  
Bederson and Company  
405 Northfield Avenue  
West Orange, New Jersey 07052-3003  
Phone # 973-736-3333  
Fax # 973-736-3367

### **XIII. Office Staff Meetings**

- All employees are expected to attend the monthly office staff meeting. This meeting is held on the first Tuesday of the month from 12:45 to 1:30. Office hours will be scheduled to allow for adequate lunchtime.
- It is expected that single vacation days or planned medical (illness) days will not be scheduled on the day of these meetings.

### **XIV. Continuing Medical Education**

HEPS feels strongly that all staff members should continue to develop their skills and experience in the field of ophthalmology and medicine in general. Because of this, the staff is encouraged to attend the following educational programs:

#### **Annual American Academy of Ophthalmology Meeting**

- The Annual Academy Meeting will be attended by two full time technicians on a rotational basis. Unless management decides on sending one or more staff member to the NextGen User's Group Meeting.
- Under unusual circumstances, this educational opportunity may be canceled.
- Airfare and a single hotel room will be provided by HEPS at no expense to the staff member. Meals will be reimbursed with receipt up to \$35 per day.
- Vacation time will be used for the travel and attendance at the meeting.
- Reservations will be handled by the Office Secretary and must be made by the end of July for the November meeting.
- These expenses are reimbursable beginning on the evening prior to the JCAPHO Courses
- Technicians are eligible to be added to the rotational list beginning the calendar year following the first anniversary of their employment.
- An acknowledging response by the two scheduled staff members must be given within one week of the date that personnel can book rooms and register. If a staff

person declines their opportunity to travel, they will be placed at the bottom of the rotation list.

- An Updated list of qualified staff is maintained by the Administrative Secretary.

### **The New Jersey Academy of Ophthalmology Meeting**

- Secretaries, receptionists and technicians may rotate on an informal basis to the New Jersey Academy Meeting. The number of staff attending this meeting is dependent upon how many staff members are needed to maintain the office schedule on that day.
- The registration and cost of attending this meeting will be borne by HEPS.

### **Ophthalmic Technician Didactic Training**

- All newly hired ophthalmic technicians are expected to participate in the Ophthalmology Technician Course at UMDNJ – DOC in Newark, New Jersey, or the home study course using online educational programs, according to the partner's decision at the time.
- The cost of this course or of training materials will be borne by HEPS
- Upon completion of the technician course or home study, the technician will take the exam to become a Certified Ophthalmic Assistant (C.O.A.).
- Upon notification of passing this JCAHPO level a salary increase of \$ 0.72 per hour (\$ 1,500 per yr) will be given on the first pay period following the technician bringing the certificate into the office.

### **Other CME**

- All home study materials that staff members may feel are important should be brought up at a staff meeting for possible inclusion in the continuing medical education process.
- If a technician takes the JCAHPO home study course and passes the exam to become a Certified Ophthalmic Technician (C.O.T.), there will be a salary increase of \$ 1.20 per hour (\$ 2,500 per year). This increase will begin the first pay period following the technician bringing in the certificate or letter into the office.
- If the technician allows their certification to lapse, but not having adequate CMEs, then the appropriate incentive will be reduced.

## **xv. Parking**

- Parking will be provided when available for all full time employees after 90 days of employment.
- HEPS takes no responsibility for the condition and contents of staff cars parked in HEPS provided parking areas.
- All employees who request parking will have a \$30 payroll deduction each month until their 6<sup>th</sup> year anniversary, after which HEPS will provide parking at no cost to the employee.

## **xvi. Terminations and Continuation of Employment**

- Any employee who no longer works for Hudson Eye Physicians and Surgeons (other than for reasons of disability) and returns after 180 days shall be considered a new employee as far as all benefits are concerned.

## **xvii. Disability**

- The position of employment will be kept open for the following defined time periods.
- Maternity leave disability extends for six (6) weeks after the date of uncomplicated childbirth.
- Medical Disability extends for 30 days from the date of occurrence.

## **xviii. Leave of Absence**

It is not the policy of HEPS to allow leaves of absences, however under extenuating circumstances it may be granted, pending the following qualifications.

### Qualifications

- Five years of continuous employment
- Leave of absence must be taken for a minimum of 6 weeks and a maximum of 3 months
- All employment benefits will remain intact during this leave of absence except those that have a cost basis such as health insurance and profit sharing plan. The employee may continue any cost basis benefits by reimbursing HEPS for these benefits
- There will be no accrual of holidays or vacation time during a leave of absence
- The employee must be in good standing in the office in order to be granted leave of absence
- The determination of eligibility for a leave of absence is up to the final approval of the partners.

## **xix. Miscellaneous**

- Staff should not bring other persons to the office for the purpose of "Day Care".

- Exceptions will be made with permission.
- Exceptions will be limited to true emergencies or health related problems.

## xx. Telephone Procedures

- The phone should be answered within 3 rings
- Always identify yourself when you answer the phone. "Good morning Hudson Eye Physicians, "your name" speaking. How may I help you?"
- If another doctor is calling one of our doctors, get the spelling of the last name. Ask if the call is regarding one of our patients. If it is, get the full name of the patient and inform our Dr. what the call is in reference to. **DO NOT LEAVE ANYONE ON HOLD UNNECESSARILY.**
- If a patient asks to speak to the Doctor. ask what it is in reference to - many patients ask to speak to the Doctor when they simply need to make an appointment. If a patient says he/she isn't feeling well, try to find out specifically what the problem is - the more information you can give our Dr. about a call waiting for him, the better.
- **Don't ever pass a call through to the Dr. without asking who it is and what it is about.** As a rule, calls should not be passed to the doctor while the doctor is seeing patients unless it is an emergency or you have been told to expect the call or caller.
- Patients that say they have an emergency and need to be seen right away require you to use good judgment. If a patient has recently had surgery, always put them in ASAP. If a patient says he/she is experiencing pain/floaters/double vision, or their eye is swollen, red, "infected" has a discharge always put them in. Symptoms other than these require your discretion. Always keep in mind that we are here for one reason - to see patients that need medical attention. If there is any question about an emergency appointment, talk to one of the doctors. Emergencies also must come in the same day they call. A patient with an emergency cannot request to be seen "next Tuesday at 2:45". If a patient refuses an emergency appointment you offer, be sure to document it in medical records under patient encounters – Demographics Template.
- When you are at one of the three seats in the reception area, all staff are to answer phones. If you are not busy with a patient, and you see a call on hold, pick it up and ask if you can help the person waiting. Even if you did not originally answer the call, or place the person on hold, no call should remain on hold while a receptionist is available to be of service.
- Smile when you answer the phone. Even though it sounds silly, your voice reflects a smile, and patients respond to that.

## XXI. JOB DESCRIPTIONS

### A. Receptionist

- 1) Welcoming and greeting patients
  - (1) Always greet the patient with a smile, tell them who you are and ask how you may be of assistance.
  - (2) You are the first person the patient encounters in the office. The experience will set the tone for the rest of the visit.
  - (3) Always answer every question or direct the patient to the person who can answer the question.
- 2) Answering phones
  - a) Appointments
    - i) helpful information
    - ii) answering questions
      - (1) eye health
      - (2) office procedure
      - (3) directions and parking
      - (4) messages for staff
      - (5) patient related or personal
      - (6) Properly documenting any encounter using EMR Patient Encounter Template
      - (7) contact lens orders
      - (8) emergencies
- 3) Computer Proficiency
  - a) As HEPS is a fully electronic, and essentially paperless, office, computer proficiency is mandatory. Typing skills, as well as general computer operations, and understanding of necessary functions are mandatory as well.
- 4) Record and chart organization
  - a) maintaining accurate data information after every patient contact
    - i. enter date, time and medical information pertinent to contact
- 5) Responding to inquiries regarding pharmacies
  - a) respond to patient, pharmacy and medication prescription requests
  - b). Generally all prescription request should be verified with a physician
    - i. The following are exceptions:
    - ii. glaucoma medications: may always be refilled within 6 months
    - iii. RX:'s should be mailed when requested (after MD signature)
- 6) Handle Patient Finances
  - a. should be comfortable with basic math
  - b. responsible for day ending, closing and balancing of charges and payments
  - c. this is very personal, not done in sight or earshot of patients

**d. Each person is responsible for their own balancing. If you don't balance, it needs to be addressed and corrected prior to leaving for the day.**

7. Make Patient Appointments
  - a. obtain essential patient information.
  - b. Reason for appointment – Corneal or Glaucoma Referral – long appt
    - ii. referral
    - iii. name, etc.
  - c. make patient comfortable
  - d. explain office policy
    - i. all emergencies MUST be told that they need to be seen same day.
  - e. reschedule canceled patients
  - f. coordinating MD staff schedules at other hospitals and institutions
  - g. recalls
8. Checking out patients
  - a. payment – co-pays should be collected at time of checkin. If we need to bill the patient there will be an additional fee for billing.
  - b. make next appointments
  - c. follow up phone calls
  - d. reports
  - e. referral to other offices
  - f. assist in x ray, laboratory referral
  - g. optical shop help
9. Hours of employment
  - a. essentially 8:30 AM 5 PM Monday Friday
  - b. minimum of 1 late night i.e. 11 AM - 7 PM
  - c. must be able to stay late for occasional emergency (rotation basis by schedule))
  - d. must be able to work 2 Saturday mornings a month
  - e. it is important to remember that this is a doctor's office. Ending time can vary, and will occasionally finish late. This is part of the job
10. Scanning of old paper charts and incoming reports and other paperwork may be required, and will be done as assigned by the office manager.
11. Receptionist in the Millburn office may be asked to assist in limited patient testing after appropriate instruction.
12. Dress code  
(see Section VII, Dress Code)

## **B. SECRETARIAL POLICIES**

1. General Responsibilities
  - a. all secretaries should be aware of general office employment policies as noted elsewhere in this manual. Although direct contact with patients is not common, punctuality,

appearance, maintaining a professional atmosphere and adhering to medical legal responsibilities is emphasized.

2. Rooms and Supplies
  - a. all secretaries are responsible for maintaining their rooms in an orderly and clean fashion. All equipment and supplies are the direct responsibility of that person and they should be familiar with reordering procedures.
3. Computers
  - a. all secretaries should be computer literate and understand basic computer principals.
  - b. all secretaries should be familiar with the NextGen computer program.
  - c. all secretaries should be capable of scheduling patients.
4. Telephone Etiquette
  - a. telephone should always be answered personally.
  - b. the secretary should always give their name to the calling party.
  - c. the calling parties name should be carefully noted with the proper spelling and a correct return phone number when appropriate.
5. Dress Code  
(see Section VII, Dress Code)

### **C. ADMINISTRATIVE SECRETARY RESPONSIBILITIES**

Include but are not limited to the following:

1. Medical/legal reports
  - a. COB reports and billing
  - b. Rehabilitation reports and billing
  - c. Compensation/PIP reports and billing
  - d. Second opinion reports and billing
  - e. All dictation
2. Answer private (non patient) telephone lines
  - a. maintain accurate messages
  - b. make phone calls requested by physicians
3. Maintain accounts payable records
  - a. Coordinate bills with invoices
  - b. Pay all accounts payable
    1. Physicians
    - ii. HEPS
    - iii. Pavonia Optical
  - c. Refund to patients all overcharges
  - d. Refund to patients all over payment by insurance companies
  - e. Refund to insurance companies all overpayments
4. Maintain employment records and generate payroll

- a. maintain employment record book
  - b. have working relationship with accountant to answer questions
  - c. keep track of vacations, sick days and overtime
  - d. scheduling of part time staff and overseeing part time staff
  - e. generate bi weekly payroll and reconcile payroll ledger
5. Pavonia Optical
- a. maintain employment records and generate payroll
  - b. keep track of vacations and sick days
  - c. coordinate all bills with invoices
  - d. pay all accounts payable
  - e. create bank deposits daily and input into computer.
  - f. reconcile bank statements monthly and coordinate with accountant.
  - g. make deposits daily
6. Maintain accounts receivable
- a. reconcile the patient and insurance transactions daily
  - b. input into computer all of these daily transactions
7. Physician Licenses and Applications
- a. complete and maintain all application forms for HMO'S, insurance companies, hospital appointments and hospital memberships
  - b. maintain paperwork for licenses
    1. DEA (drug enforcement agency)
      - ii. New Jersey Medical License
      - iii. CDS (controlled dangerous substances)
8. Mail
- a. see that all outgoing mail is mailed
  - b. responsible for postage meter
  - c. distribute incoming mail
9. Banking
- a. deposit all checks daily
  - b. all bank statements should be reconciled monthly
  - c. all relevant paperwork should be available for the accountant monthly

## **D. SURGICAL COORDINATOR / BILLING MANAGER RESPONSIBILITIES**

Include but are not limited to the following:

1. Responsible for scheduling surgeries
  - a. surgery is scheduled directly and by telephone
  - b. answer any questions regarding medications, pre-op and post-op instructions.
  - c. explain the use of the preoperative drops to the patients
  - d. review any do's and don'ts for the patients
  - e. have informed consent forms signed
  - f. explain the medical clearance and pre-admission testing procedures
2. Must call insurance companies for second opinions and approvals prior to surgery
3. P. A. T. and Medical Clearance
  - a. each patient must be cleared by a medical doctor
  - b. minimal laboratory testing as required by the hospital or Pavonia Surgical Center must be obtained.
  - c. responsible for receiving all PAT and medical clearance prior to surgery and forwarding them to the surgical facility.
  - d. relating all PAT and medical clearance results to the surgeon as soon as possible prior to the surgery.
4. Schedule the Surgery with the Surgical Facility which include
  - a. Pavonia Surgical Center, Inc. 216 1700
  - b. Jersey City Medical Center 915 2321
  - c. Clara Maas Hospital
5. Complete any other necessary paperwork which may include
  - a. surgical facility booking information sheet
  - b. progress note for chart
    - i. must include visual acuity, diagnosis and patient information
  - c. Aging reports on patients.
6. All information must be entered into the computer
  - a. day, time and place
  - b. medical record field
7. Maintain inventory of postoperative kits. This is done in conjunction with PSCI and technician staff
8. Arrange transportation when necessary
  - a. always ask every patient if they need transportation
  - b. notify the operating surgeon if transportation is needed out of Hudson County
9. Responsible for inputting all surgical charges (computer) after surgery is completed

10. Responsible for the surgical phone line (201 792 2020)
  - a. maintain the answering machine respond to all recorded answering machine calls
  - b. respond to all patient inquiries concerning surgery, billing problems and appointments
11. Complete all disability and insurance forms for surgical patients
12. Maintain surgical schedule, and waiting list.
  - a. stay abreast of all holidays
  - b. **stay aware of surgeons vacations and meetings out of town**
14. Continuing Education
  - a. maintain knowledge of current surgical techniques
  - b. maintain awareness of PAT process
  - c. be familiar with outpatient surgical process
15. Generating Account Receivables
  - a. must be familiar with medical billing
  - b. is responsible for billing all surgical cases
  - c. is responsible for billing consultations
  - d. call insurance companies to facilitate third party payments
16. Patient Education
  - a. responsible for informing patients about non surgical aspects of surgery. For example, description of the surgical facility, insurance responsibilities and approximate times of confinement.
  - b. all discussions with patients should be reassuring so that patients will feel comfortable asking questions and getting information from the secretary and not the doctor.
17. As Billing Manager, supervises billing personnel, gives direction for follow-ups on billing issues with them. Assign tasks to billers and maintain reports on tasks, reviewing reports with Dr. Constad weekly. Participates as trouble-shooter for settling claims on troublesome accounts.
18. Interacts with patients, as necessary to settle billing questions. When necessary passes on particularly troublesome situations to office manager.
19. Reports to Office Manager and designated Partner
20. Meets with Office Manager and designated Partner at least monthly, but as needed.

## ***E. Billing***

### Job Description

1. Electronic claim submission on charges entered by others.
2. Electronic reconciliation and reports to follow claims submitted
3. Processing of insurance checks with data entry into NextGen, either manually or electronically.
  - a. generates electronic billing on a daily basis
  - b. generates patients bills monthly
4. Scanning and filing of EOBs in an organized fashion so that they may be retrieved as needed.
5. Re-submission of claims as necessary for denials with correction of mistakes made on original data entry
  - a. Following up with the party who entered the mistake originally so that mistake is not repeated in future
  - b. Bring repeated mistakes by same individual to the attention of the billing manager so that the person can be properly trained and/or supervised.
6. Calling insurance companies to follow-up on claims processing delays and errors
7. Calling patients to explain EOB issues as necessary, such a co-pays, deductibles and balances due
  - a. Problems related to this should be brought to the attention of the Billing Manager
8. Any repeated billing issues, such as denials of particular CPT codes, are to be brought to the attention of the billing manager, and ultimately the Partners so that corrections can be made in either CPT codes selected, or matching necessary ICD-0 codes so that the charge will be recognized.
9. Participate in the education and training of front desk personnel so that entry errors can be minimized
10. Enter and update edits in the claims editor of NextGen on a regular basis as the need arises to be sure that we get clean claims.
11. Verify electronic referrals for front desk
12. Run daily reports for front desk charges on day prior to check for errors. Correct errors and educate front desk to lessen chance of repeat errors. Bring repeated errors to the attention of the Billing Manager.
13. Answer all phone calls pertaining to billing inquiries from patients and insurance companies

## **F. OPTHALMIC ASSISTANTS & TECHNICIANS**

### **JOB DESCRIPTIONS**

1. Office Responsibilities
  - a. Ophthalmic technician must be aware of general office employment policies and OSHA rules and regulations. Particular emphasis is placed on punctuality, proper dress, maintaining a professional atmosphere.

2. Technician Responsibilities
  - a. Maintain the examining rooms in an orderly and clean fashion. The room should be well maintained with instruments and reusable supplies. Any equipment that needs to be calibrated or repaired should be done immediately and doctors notified of any defective equipment. All the equipment should be covered in the evening to maintain a dust free environment.
  - b. Technician should be comfortable working with the computers and should have a working knowledge of the NextGen computer program including scheduling and medical records.
  
3. Patient Examination
  - a. Maintain an orderly patient schedule to insure that the patients are seen on time. Also try to bring ocular emergencies into an examining room for treatment according to the level of emergency.
  - b. Escort the patient from the waiting room to the examining area.
  - c. A cordial introduction should be made and an exchange of any urgent information and the taking and recording of the patient's medical history should take place. This history should include:
    1. general health
    2. family history
    3. current medications and allergies
    4. patient's medical physician
    5. the ophthalmic chief complaint
    6. all past ocular history
    7. The Ophthalmic examination should begin and should include the following:
      1. patient's best corrected distance vision
      2. best corrected near vision
  - f. The patient's glasses should be carefully neutralized on the lensometer and recorded on the chart
  - g. A refraction should be performed if indicated depending upon the patient's age and general ophthalmic complaint and condition
  - h. Intraocular pressure should be measured with an applanation tonometer or pneumotonometer, if indicated. If the intra-ocular pressure is unobtainable then this should be briefly noted in the record.
  - i. Any previous instructions should then be carried out. These may include visual fields, scans or dilating instruction.
  - j. Any further testing should be performed by the ophthalmic assistant or technician. These tests may include:
    1. visual field
    2. contact lens fitting instructions
    3. keratometry
    4. ultrasonography
    5. color vision
    6. Amsler grids
    7. pachymetry and/or endothelial cell counts
    8. potential acuity measurements
    9. corneal topography or wavefront analysis

10. OCT
11. Schirmer tear testing
12. stereopsis testing

k. Medical charting and recording – all of the above test results and any further examinations by the Doctor should be carefully and completely noted in the patients record. A clear statement of the patient's diagnosis and plan of therapy should be completed in the record clearly. All prescriptions including eye glasses, drops and systemic medications must be noted properly and any patient prescription should be written clearly.

4. Surgical Assisting Responsibilities

- a. Technicians should be comfortable with their knowledge of minor and major surgical procedures so that they can be of comfort to patients. In addition, the ophthalmic assistant should be capable of setting up the minor surgery room for any minor surgical procedure.
- b. Technicians are invited to watch surgery in Pavonia Surgical Center in order to familiarize themselves with these surgical procedures.

5. Maintaining Supply Inventory

- a. All technicians will be responsible for maintaining supplies in the examining room area.
- b. All technicians should be aware of supply requirements and current needs. These needs should be reported to the technician in charge of ordering supplies.

6. Repair of Instruments

- a. a technician (or technicians) will be in charge of coordination all instrument repairs
- b. a technician should be able to recognize problems with instruments and should report them immediately to a doctor
- c. the repair of the instrument should be arranged by the technician in charge with the doctors approval

7. General Maintenance of Examining Rooms

- a. all examining rooms will be assigned to one or more technicians for general maintenance
- b. general maintenance includes maintaining all supplies, general cleanliness and equipment function

8. Coordinating "Technician" Meetings

- a. a technician will be assigned the coordination of meetings
- b. meetings will be held on a "as needed basis" and upon request of a technician or physician
- c. the coordinating technician will construct a list of suggestions and comments provided by other technicians and physicians

9. Levels of "Ophthalmic Technician" certification

- a. certified ophthalmic assistant
- b. certified ophthalmic technician

c. certified ophthalmic medical technologist

10. Contact Lenses

a. All Contact Lenses

1. maintain inventory of contact lenses and solutions
2. place orders promptly for non-inventory lenses
3. receive incoming orders
4. coordinate shipping of outgoing lens orders
  - i. check to see if billing information is noted in the computer
  - ii. update billing information if necessary
  - iii. maintain careful records and notes concerning special fees. E.g. invoice notes and special courtesies
  - iv. maintain the list of contact lens parameters and be familiar with this information
  - v. enter into the NextGen program all the soft contact lenses that have been ordered, received and dispensed.

11. Patient Medical Forms

a. Preoperative laser form

1. one technician will be responsible for filling out the preoperative information prior to YAG laser surgery.
2. these forms should be filled out on a daily basis and be returned to the surgical secretary. The surgical secretary will be responsible for giving these charts to the technician.

12. Patient Education Resources

- a. One technician will be responsible for ordering and maintaining the supply of patient information brochures. These should be displayed in the appropriate areas.

13. Dress Code

(See Section VII, Dress Code)

## **G. HOUSEKEEPING**

1. Hours

- a. Housekeeping will be done outside of patient hours.
- b. The office will be cleaned 5 days a week
- c. on occasion, the hours may be revised to accommodate special programs or an occasional Saturday cleanup.

3. Responsibilities

- a. Cleaning of the entire HEPS office and Pavonia Optical area.
  - i. daily vacuuming of all carpeting
  - ii. cleaning and mopping of all marble and tile areas
  - iii. general dusting of all areas except for instruments
  - iv. cleaning of the windows (inside only)
  - v. Removal of trash from all areas

vi. scheduled cleaning of ceiling air conditioning and heating ducts

b. Kitchen

- i. general cleanup of the kitchen area
- ii. responsible for general cleaning after lunch
- iii. every staff member is responsible for cleaning up after themselves after each meal
- iv. helping to prepare and cook lunch
- v. keep appliances clean and trash compactor empty

c. Supplies

- i. help maintain general food supplies
- ii. coordinate shopping lists
- iii. do occasional shopping
- iv. maintain cleaning supplies
- v. purchase supplies

**IT IS NOT THE FUNCTION OF HOUSEKEEPING  
TO CLEANUP AFTER ANY STAFF MEMBER**

## H. OFFICE MANAGER

Job description is listed below, but not limited to these items.

1. Oversee all office operations for all office locations
2. Personnel for front office and billing, administrative management for techs
3. Work with billing manager to help with troubleshooting for problematic companies/accounts
4. Education and training of reception staff  
this requires complete knowledge of NextGen setup and maintenance.  
This also includes etiquette training of staff
5. Coordinate and review scheduling for reception staff
6. Work with billing manager for scheduling on billing staff
7. Address timeliness issues for all personnel
8. Point person for all dealings of participation with insurance companies, including contract negotiation
9. Oversee optical shop in supervisory roll review of schedules and help coordinate schedule adjustments between offices.
10. Answer back office line when Administrative secretary is not available
11. Coordinate doctor's schedules at both locations, review schedule changes and adjust computer schedules to reflect reality.
12. Review time-off for all employees - though calendar is generally kept by the Administrative secretary, the Office manager should be up to date and familiar with vacation and times off for all personnel, including doctors
13. Any problems with office coverage needs to be brought to the attention of partners.
14. Prepare monthly reports
  - Appointment statistics
  - Revenues by MD and by location, by Optical shops
  - Maintain ongoing spreadsheet to improve ability to track office productivity
15. Chair monthly office meetings
16. Schedule Bi-annual office meeting - which should involve in-service specific for each office area - reception, billing, technician staff. This meeting can be scheduled for a few hours, and should be coordinated for timing so that it has minimal interference with patient care. Thus if two doctors will be out of the office, and this is known in advance so that a meeting can be scheduled, it should have minimal impact on patient services.
17. Annual review of employees - should be written for all reception and back office employees, Technician reviews will be included, but should be done, based on discussion with doctors, following an outline of technical patient care points.
18. Weekly meeting with partners

## **I. MILLBURN SURGICAL COORDINATOR**

The Job position is listed below, but not limited to these parameters:

1. Book all surgeries, in-patient, out-patient, YAG Caps.
  - a. Includes insurance pre-certifications, as necessary
  - b. Arrange Pre Admission Testing and/or clearance as necessary
  - c. F/U on all related issues
2. Bill for Surgeries, Lasers & Consults done out of Millburn Office
  - a. Billing must be done within 24 hrs of the procedure
  - b. Follow-up billing on anything billed. including
  - c. Billing follow-up for Millburn patients as needed.
  - d. Assist billing department with answering questions from patients on billing issues (as appropriate for Millburn office).
3. Track hours of employees.
  - a. Maintain Millburn "Days Off Calendar" with hours-worked, such that Administrative secretary can calculate payroll
4. Order Office Supplies
  - a. Will utilize Hudson Eye accounts.
  - b. Forward bills and invoices to Janice, confirm receipt of ordered products
5. Order Medical Supplies
  - a. Track inventory of needed medications and medical supplies
    - i. Order using HEPS accounts from list of HEPS supplied vendors being sure to indicate appropriate mailing address.
      1. confirm receipt of items
      2. forward bills to Janice
6. Answer phones and schedule appointments, forward calls as appropriate
7. Open and distribute mail.
8. Make bank deposits for Millburn Optical and verify day-end sheets for Millburn closing, appropriately sending envelopes to Jersey City for processing.
9. Scan letters and referrals into Medical Records as needed.
10. Visual Fields or other diagnostic testing on an "as-needed" basis.
11. Medical Records Release, signing, and sending requests for records.
  - a. Scanning incoming records into patient chart
12. Scanning incoming reports and lab tests into patient chart, AND filing same in DAG patient chart.
13. Fill out incoming medication clarification or contact lens Rx forms that come into the office, have MD sign and fax back as necessary.
14. Producing and mailing referral letters out of NextGen, (occasionally may be dictation) for Referring doctors to the Millburn office.

### **I. Millburn Optical, Inc - Optician**

Pavonia Optical, Inc dba. Millburn Optical, Inc

#### **A Manage Optical Dispensary**

1. Manage Inventory, purchases, exchanges, etc
2. Sales and inventory to be through **NextGen Optik** Program
3. Optical shop is to be open when medical office is open.

4. Coordinate purchases, inventory and laboratories with Jersey City office
5. Responsible for personnel in dispensary, lab or counter help.

All payroll entries, checks, profit sharing plan and benefits is handled by Janice in the Jersey City Office. Although personnel decisions will be yours, any decisions need to be filtered through the Office Manager (currently located in Jersey City).

6. Purchases not made "on account" will be done through the Optical Shop Credit Card. You will be issued an American Express Card which can be used for Optical Shop Purchases when possible.

7. Physical inventory will be done twice a year. This should be coordinated with the Jersey City office, if possible, so that shared inventory discrepancies can be accounted for.

8. Daily Sheets will be printed from the Management Program, justifying sales and receipts. Nightly deposits will be made at The Bank of New York into the Pavonia Optical Account. Daily sheets will be forwarded to Janice (can be by e-mail or printed).

9. Any major repairs or equipment replacement (more than \$500) need to be discussed with partners.

10. Run inventory management reports (part of Optik Program) on a monthly basis, to be forwarded to Office Manager.

Benefits Package is same as that for Hudson Eye Physicians & Surgeons, LLC employees, with the exception that you will have 4 weeks vacation time (one week of which can be repurchased by HEPS, holidays, profit sharing plan, health coverage, 401K plan, sick time, etc.

## **J. EMPLOYEE FORMS AND APPLICATIONS**

1. Application for Employment
2. W 2's

## **XXII. SECURITY POLICIES**

1. Office Alarm System
  1. all employees are required to not divulge the Guardian security code to anybody.
  2. Keys
    1. employees should inform the office immediately if a key is lost.
  3. Opening the Office
    1. any unusual circumstances should be noted. This would include obvious tampering or supplies/equipment out of place.
    2. any open doors or open lights should be reported.
  4. Closing the Office

1. make sure that all lights are turned off
  2. be certain that all kitchen appliances (including coffee machine) are turned off
  3. be certain the gates are securely down
  4. be certain the alarm system is set
  5. test to be sure the rear door is secure before walking away
5. Building Security
1. in an emergency building security can be notified by calling
  2. Guardian hot line is 800-533-4827

b. Pavonia Towers Fire Safety Plan

## **XXIII. STATE AND FEDERAL HEALTH RULES AND REGULATIONS**

1. Blood Borne Pathogens Prevention Treatment
2. OSHA

## XXIV. RESOURCE MATERIALS

1. American Academy of Ophthalmology Travel Schedule
2. Group Insurance Requirements Disability/Hospitalization

### Occupational Safety and Health Administration

#### Handling of Instruments:

- 1) Instruments should never be thrown in water basin. Place them gently in basin to be soaked before cleaning.
- 2) Corrosive elements of instruments are saline, blood and tap water.
- 3) Instruments are to be cleaned in Metriclean (detergent and lubricant) rinsed and dried completely, then sterilized.
- 4) Autoclave should be cleaned weekly to remove mineral build up (LPH)
- 5) Fine tips should be covered for protection. Handle instrument gently and all instruments are used for their intended purposed only.
- 6) A knife blade should be removed from its handle by using a needle holder ONLY

#### Cleaning of Instruments:

- 1) Sinks or basins should be marked for 1 gal.
- 2) Soap and water.
- 3) Protective clothing long sleeve and fluid resistant.
- 4) Heavy duty rubber or plastic gloves
- 5) Rinse to remove gross contamination  
Soak and manually wash instruments wearing protective clothing
- 6) Rinse instruments, manually dry and inspect
- 7) Use appropriate protection when in contact with cleaning detergents, germicides, bleach and blood.
- 8) Household bleach blood spills
- 9) Alcohol countertops and equipment. Needs to be in wet contact for 3 min. to be effective.

## POLICY AND PROCEDURE MANUAL FOR BLOOD BORNE PATHOGENS: PREVENTION AND TREATMENT

### 1. WHO IS AT RISK?

#### A. Physicians.,

Procedures that involve the use of sharps i.e. needles used to remove corneal foreign bodies, injections for minor surgery anesthesia, sub-conjunctival injections, cutting sutures, minor surgical procedures including chalazion, removal of lid lesions, entropion and ectropion repair and epilation of trichiasis.

#### 2. Technicians:

Assisting at minor surgical procedures, cleaning instruments after minor surgery and disposing of sharps.

### 2. UNIVERSAL PRECAUTIONS

#### A. Minor Surgery:

While performing minor surgery or assisting at minor surgery, sterile latex gloves will be worn.

#### 2. Cleaning of Instruments after Surgery,

Non sterile latex gloves will be worn. Instruments will be washed with soap and water and then placed immediately in sterilizer to complete cycle.

#### 3. Disposal of Sharps:

All needles and scalpel blades will be discarded immediately after use in RED containers marked for bio-hazardous materials and sharps. When the room containers are full, they will then be placed in the hazardous waster barrel in the storage room. When this container is 3/4 full, disposal company will be called and container sealed until picked up.

### 3. EDUCATION

#### A. Monthly Technician Meetings:

Discussion of universal precautions and identification of any risk procedures.

#### 2. Monthly Staff Meetings:

Discussion with rest of staff informing them of risks in office procedures and to identify any other personnel at risk.

### 4. PROPHYLAXIS:

All physicians and technicians have been offered Hepatitis B Vaccine to be provided by Hudson Eye Physicians and Surgeons. All who decline will sign waiver to that effect.

### 5. IDENTIFICATION OF RISK PREVENTION OFFICER:

**Donald J. Cinotti, M.D.**

**6. TREATMENT:**

All exposures to potential hazardous materials will be reported to risk prevention officer immediately. The type of exposure (needle stick, cut by instruments, exposure to body fluids without protective garments, etc.), the time and if possible the patients name involved. The patient will be contacted by the risk officer and asked if they would allow testing for HIV and Hepatitis, cost borne by Hudson Eye Physicians and Surgeons. The employee will be offered an infectious disease consult at Jersey City Medical Center (Dr. Greenberg) or Christ Hospital (Dr. Bellomo). The cost of the consultation and any treatments provided by Hudson Eye Physicians and Surgeons. All such incidents will be held confidential.

## SEXUAL HARASSMENT IN THE WORKPLACE

### Objectives:

1. Define sexual harassment and discrimination behavior
2. Understand the law as it relates to harassment in the workplace
3. Describe HEPS policy on sexual harassment
4. List three actions to be taken if you feel you are being sexually harassed

### Sexual Harassment

#### Definition:

Any unwelcome sexual advances in the workplace that is repeated and interferes with an employee's ability to perform his/her job. Any request for sexual favor or other sexual conduct when:

1. an employee's submission is made a condition of employment
2. an employee's submission or refusal is used as a basis for decision affecting employment status
3. such conduct interferes with a worker's job performance or creates an intimidating, hostile or offensive work environment

#### Two Types of Sexual Harassment:

1. Latin Phrase: : Quid Pro Quo "This for That":

Involves manager, supervisor or employer in a position of power. Promises job, promotion or raise in return for sex (implicit or explicit). Also rejection of sexual advances means loss of job, promotion or raise.

2. Hostile Environment:

Behavior by anyone in the work place that produces a hostile environment for an employee. The harassment may be verbal as well as physical. Three conditions which must be met are:

- a. The behavior must be sexual in nature
- b. The behavior must be unwelcome
- c. The behavior must be severe or pervasive

#### Statistics:

Women who have been sexually harassed in the workplace are nine times more likely to quit than men.

One half of all women workers report unpleasant incidents in the workplace.

These included jokes and demeaning comments

Ninety percent of harassers are men who harass women

Five percent of harassers are women who harass men

Five percent of harassment occurs when both parties are of the same sex

#### Law:

Workers are protected by laws based on the Title VII of Civil Rights Act of 1964 which led to the creation of the EEOC (Equal Employment Opportunity Commission). The EEOC prohibit discrimination of employees on the basis of race, sex national origin or religion.

Policy:

HEPS is committed to providing its employees with an environment that is free from sexual harassment in any form. To that end, it is the policy of HEPS that no HEPS employee, physician, patient or visitor may engage in sexual harassment. All reports of sexual harassment will be addressed immediately and will be kept confidential.

Actions to be taken if an employee feels they are being sexually harassed:

1. Tell the person who is the harasser to STOP
2. Keep notes of all behavior that is indicative of harassment
3. Notify your supervisor immediately. If the harasser is your supervisor, notify your supervisor's boss