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DESIGNED FOR FREEDOM

PRETEST TOOLKIT · FOR YOUR OPTICAL ASSISTANTS

The Pretest Script.

*The first five minutes of every eye test,
asked the same way every time.*

A FREE RESOURCE FROM DESIGNED FOR FREEDOM

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Why the pretest matters

The pretest is the first proper conversation in the visit. It is where the patient first tells you what they need. When it is left to chance, the optometrist starts from zero and the frame desk guesses. When it is done well, everyone after it already knows what matters to this patient.

THE MINDSET

You are not selling anything. You are listening, so the optometrist and the frame desk can look after this patient properly.

Five rules for every pretest

1. Ask the same questions, in the same order, every time.
2. Write down the answers in the patient's own words, not yours.
3. Ask while you run the tests, so it adds no extra time.
4. Pass the note to the optometrist before the patient walks into the room.
5. Listen and record only. Leave advice, results and products to the optometrist and the frame desk.

WORDS IN SQUARE BRACKETS ARE FOR YOUR TEAM TO FILL IN

Open warmly

"Hi [first name], I am [your name]. I will run a few quick tests before you see [optometrist]. While we do, I will ask you a few questions, so they know what matters to you before you walk in."

The seven questions

1. The reason for the visit

"What brings you in today? Is there anything you have noticed with your eyes or your vision?"

2. Their current glasses

"How are your glasses going for you day to day? Is there anything you wish they did better?"

3. Their day

"What do you spend most of your day looking at? Screens, driving, reading, work, sport?"

4. Screens

"Roughly how many hours a day are you on a screen, including your phone?"

5. Driving

"Do you drive much, and how do you find driving at night?"

6. Contact lenses

"Have you ever worn contact lenses, or thought about them for work, sport or going out?"

7. Changes since last time

"Has anything changed with your general health or medications since your last visit? [optometrist] will go through this with you as well."

Close the pretest

"Thank you, that helps a lot. I will pass this on to [optometrist], so they know what matters to you before you even sit down."

One note, passed on every time

Write the note in the patient file or on a handover card, and pass it to the optometrist before the patient walks into the room. Use the patient's own words wherever you can.

Heading	Example
Reason for visit	Blurry at the computer by mid afternoon
Current glasses	About three years old, scratched, wishes they were lighter
Their day	Office job, drives to work, plays tennis on weekends
Screens	About eight hours a day
Driving	Daily, finds night driving harder than it used to be
Contact lenses	Never worn, interested for tennis
Changes since last time	None reported
In their words	"My eyes feel wrecked by three o'clock."

WHY THE PATIENT'S OWN WORDS MATTER

When the optometrist says "you mentioned your eyes feel wrecked by three o'clock", the patient feels heard. Every recommendation after that makes sense to them, because it starts with their problem, not a product.

Where the note goes next

- The optometrist reads it before the patient sits down, and opens with what the patient said.
- The optometrist adds the clinical findings and the recommendation to the same note.
- The frame desk reads the full note before the patient arrives, and starts from the patient's own problem.
- In the Designed for Freedom optical framework, this note is what makes the clinical handover work.

Stay in your lane

The pretest is for listening. These four things belong to the optometrist and the frame desk, not the pretest room.

Avoid	Say this instead
Commenting on test results, such as "that pressure looks high"	"[optometrist] will go through all your results with you."
Recommending lenses or products	"That is helpful, I will make sure [optometrist] knows."
Talking about prices	"The team at the front will go through all of that with you."
Rushing the questions to keep to time	Ask them while the tests run. Seven questions take about two minutes.

When the patient is in a hurry

"No problem, I will keep it quick. What is the one thing you would most like [optometrist] to look at today?"

Write that one answer down and pass it on. One good answer is better than seven rushed ones.

This is general guidance, not clinical or legal advice. Follow your practice protocols and the scope of practice for each team member.

Train it, then check it

1. Run a 20 minute role play at your next team meeting. Assistants take turns as the patient.
2. For the first two weeks, the optometrist gives one line of feedback on each handover note.
3. Once a week, the owner or practice manager reads five handover notes and checks all seven questions were asked.
4. Keep this script printed at every pretest station.

The weekly check

Assistant	Week of	Notes checked	All seven asked	Passed on before the consult	One thing to improve
Example: Sarah	2 Nov	5	4 of 5	5 of 5	Ask about night driving

HOW MUCH DOES YOUR PRACTICE DEPEND ON YOU?

A pretest that runs the same way every time is one more part of the practice that no longer needs you. Take the Freedom Score to see how many others still rely on you.
freedomscore.michaelstefanescu.com

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*The eye test starts before the patient
sees the optometrist.*

Kind Regards, Michael Stefanescu