

# Health Services Board OKS Operations Manual

*Your guide for using the Spot Vision Screener to develop a Club plan, prepare for screening events, conduct screening events and report the results.*



**Operation KidSight - New Hampshire Lions MD44**



**Made Possible with a Grant from Lions Clubs International Foundation**

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# **Introduction to HSB OKS Operations Manual**

## **Background**

Operation KidSight (OKS) is a major service program we have been providing within New Hampshire since 1998. Over that time we have used three generations of technology to conduct screenings:

- Medical Technology & Innovations (MTI) PhotoScreener
- Titmus Vision Screener
- Welch Allyn SureSight Vision Screener

The plan for MD 44 is to replace the out-dated equipment in favor of new more sophisticated, digital based vision screening equipment.

## **Introducing the Spot Vision Screener**

MD 44 has purchased over 16 Spot Vision Screeners by Welch Allyn as the device we will use for future screenings. The Spot is designed to work as easily with toddlers as with teenagers, providing reliable data in seconds. Trained screeners can now confidently assess eyesight for all ages.

Spot is powered by sophisticated technology that quickly detects indications of the following vision issues:

- Near-sightedness (myopia)
- Far-sightedness (hyperopia)
- Unequal refractive power (anisometropia)
- Blurred vision, eye structure problem (astigmatism)
- Pupil size deviations (anisocoria)
- Eye misalignment (strabismus)

In just seconds, Spot provides a comprehensive, reliable analysis that enables informed decision making about the need for follow-up diagnosis.

## **Expanded Goals for Operation KidSight**

With the addition of the Spot Vision Screener we are now able to reach a broader audience (adults and children starting at six months) and do screenings more efficiently than we have in the past. OKS will continue to focus on children, but now with the Spot we are expanding the age range to include all children from six months through high school. Therefore the new objective is to provide vision screenings for all school age children within New Hampshire utilizing the Spot Vision Screeners, targeting the most “at risk” group from six months to six years representing the youngest in our schools and preschools.

Additional goals include general awareness of the benefits of early vision screening and the Lions participation and support of this education. Ancillary goals include recruiting new members dedicated to helping children and using these screening programs as the nucleus in forming new Lions Clubs in communities not yet served by Lions Clubs International.

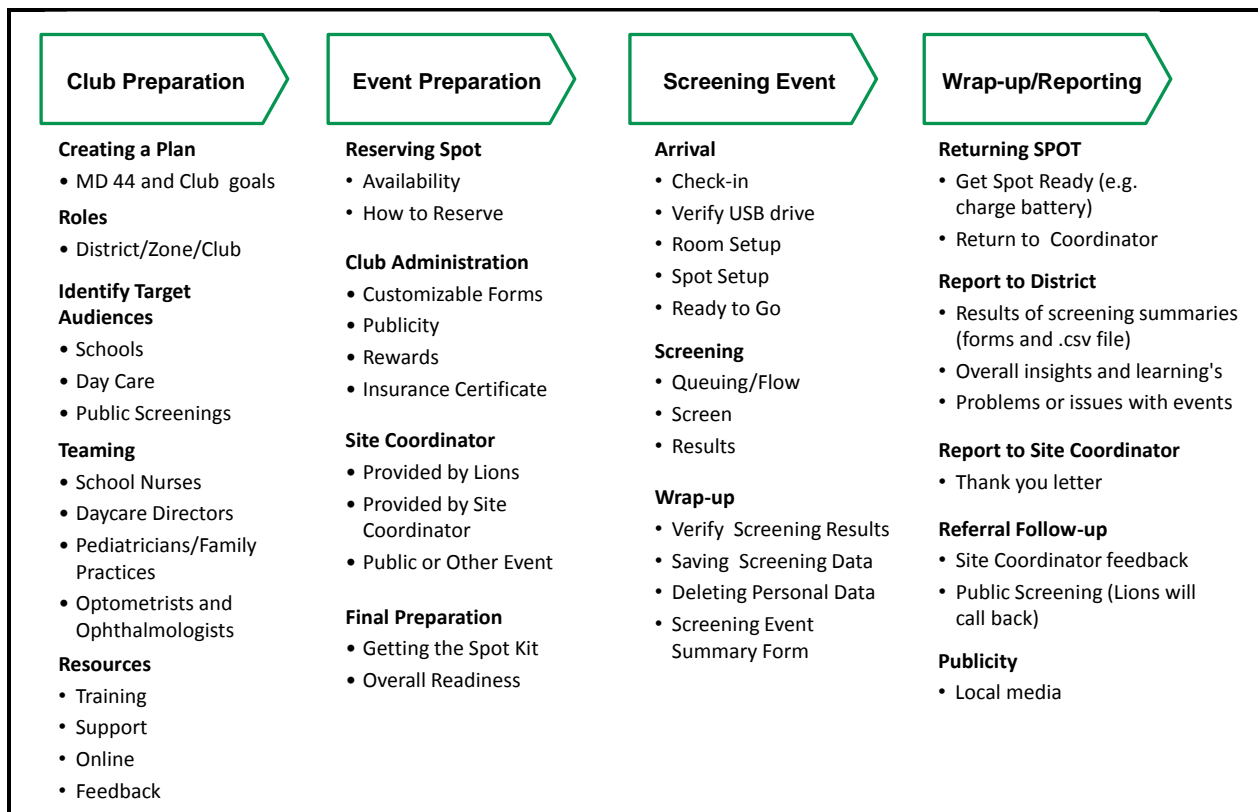
In order to meet this objective there are several critical success factors that have to be met:

1. Need to have all clubs participate in screening, increasing from the 18 Clubs that currently performing screenings to have all 79 Clubs in NH participate.
2. Expand from the 90 towns we currently serve to include all 221 towns in NH.

3. Improve the IT infrastructure so we can electronically file the results of screening, provide required reporting on our progress, make it easy to reserve a Spot and provide a website/repository to support clubs and screeners.

The Health Services Board has identified the major elements that need to be carried out as clubs plan and conduct screenings. The following diagram is a summary of the content in the *HSB OKS Operations Manual*. The Operations Manual has been organized by chapters corresponding to each of the four major columns.

**Not every Lion needs to read the entire manual.** For those Lions that will be part of a screening team then the recommended reading are the Introduction and the Screening Event chapter. For those Lions responsible for setting up screening event then they should also read the Event Preparation and Wrap-up/Reporting chapters. The OKS Club Coordinator will also read the Club Preparation chapter.



## Club Preparation

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### Creating a Plan

Each club should develop a plan that identifies the audiences they will target each new Lion year (July 1 to June 30). Following are the target audiences that MD 44 has set as part of its goals to reach the approximately 200,000 school-age children in New Hampshire: Each club will need to prioritize and have a phased approach as it will take multiple years to reach the MD 44 goals.

The primary focus for MD 44 is children from six months to six years. Most of these children are in preschool and elementary schools and licensed day care facilities throughout the state. The goal for MD 44 is that all school-age children will be screened each year until the completion of their 6<sup>th</sup> grade. The number of children in these categories as of 2014 is:

- 3,401 Preschool children
- 11,602 Kindergarten children
- 82,644 Elementary school children
- 7,200 children attending 1,200 licensed day care facilities

There are a number of children (the number is unknown at this time) aged six months and older that are not yet in preschool or daycare. This is a harder audience to reach to provide screenings, but a critical audience we need to reach

There are also 5,914 Home schooled children in New Hampshire that have a significant number of children from six months to six years.

The next priority would be rest of the school-age children:

- 28,940 Middle school children
- 58,720 High school children

Screenings will be every other year for grades 7 through 12. By doing the 7<sup>th</sup>, 9<sup>th</sup> and 11<sup>th</sup> grades every year all children in this age group will get screened every other year.

Lastly to reach all school-age children in NH we need to expand from the 90 towns we are currently serving to screening in all 221 towns in the state.

Another component of the plan is to address cooperation with other clubs on deciding which clubs will screen in towns not currently served by our Lions Clubs, getting approvals with the SAU when more than one club serves schools in the same SAU, relationships with optometrists and ophthalmologists used by both clubs, and reaching out to the pediatricians and family practices.

We include a *Club Planning Template* that you can use to develop your plan.

### Roles

#### District

OKS is directed by Multiple District 44. Management of the data collected, coordination of District-owned vision screeners, a point of contact for clubs establishing vision screening programs in their community, promotion management and evaluation of market development will be the responsibility of the Health Services Board (HSB). As a committee of the Multiple District (MD), HSB will be overseen by the MD leadership, District Governors and Multiple Council Chair.

A HSB OKS Coordinator will manage the collection of screening data from the clubs, specifically age, community, date of screening, # screened, # of referrals, results of referral, management of referral network of vision doctors throughout each service area, non-identifiable vision issue descriptions, and follow-up results of referral.

For the Zones with HSB owned Spots a HSB Spot Reservation Coordinator is responsible for reservations of the Spots and coordinating effective usage of the Spots within the Zones. They will also be responsible for any HSB controlled Spots that would typically be used for training and backup to Zone Spots. The Zones that own their own Spot will manage their own reservations.

## **Zone**

For the Zones that have purchased a Spot and other Zones using a HSB owned Spot will have a OKS Zone Coordinator responsible for maintaining the Spot Kit, movement of the Spot from Zone to Club and Club to Club. They will lead in the development of Club plans and address common issues across clubs.

## **Club**

Each club will appoint an OKS Club Coordinator. This Lion, representing their club, will work with the HSB to create and/or expand a vision screening program in and around the Lions Club's home community. The OKS Club Coordinator will answer any follow-up questions from parents and others being screened as a result of the screening.

Each club will have club members trained to conduct the screenings. There are two levels of screeners required, some will have the knowledge and experience to be a Lead Screener and all will have the skills to be a Screener as described below:

1. Lead Screener – This requires club members with a technology background that can help get the USB drive created, load it on the Spot, handle any technical issues with the Spot and printer, be familiar with Excel and be responsible for reporting screening event results to the District.
2. Screener - Club members that can do screenings with the Spot, organize the people to be screened, handle all paperwork required, provide rewards to the children and provide a cheerful disposition while screening.

To create a consistent and productive vision screening program, each club will utilize the Operation KidSight Vision Screening Manual. This manual will provide direction on procedures and reinforce screening goals

## **Identify Target Audiences**

The following sections will provide the information you will need to identify the audiences that you will be screening.

### **Preschool through Grade 12**

The information you need for schools in the towns you will be screening is available on the NH Department of Education website - [www.education.nh.gov/](http://www.education.nh.gov/). By clicking on [NH School and District Profiles](#) you will be able to search:

- *By County* (shows all the towns in the county)
- *By City or Town* (you can go directly to the towns served by your club).

Searching *By City or Town* (using Antrim as an example) you get two important pieces of information-- contact information for the school and enrollment data. By clicking on the School Web Site you can search the Staff Directory and determine who the school nurse is, as they are typically our primary contact for doing screenings. It is also important to know that the SAU or District is will require approval of the Parental Consent forms prior to distribution to the parents.

<b>School:</b> Antrim Elementary School	<b>NCES School ID:</b> 00065
<b>District:</b> Contoocook Valley	<b>NCES District ID:</b> 3302480
<b>SAU:</b> Contoocook Valley SAU Office	<a href="#">School Web Site:</a>
<b>Superintendent of Schools:</b> Brendan Minnihan	SAU Telephone: 603-924-3336
<b>Admin Principal:</b> Ann Allwarden	<b>School Telephone:</b> 603-588-6371

	<b>October 1 Enrollment</b>		
Grade(s)	School	District	State
PreSchool	23	48	3,401
Kindergarten	32	147	11,602
Readiness	0	0	58
Grade 1	27	156	13,461
Grade 2	26	150	13,510
Grade 3	18	147	13,546
Grade 4	29	172	13,925

With the information for your towns you can now:

- See what schools are in the towns served by your club.
- Determine how many children need to be screened at each school.
- Find out who the school nurse is to set up screening event(s) at their school(s).

The goal for MD 44 is that all school-age children will be screened each year until the completion of their 6<sup>th</sup> grade. Thereafter, the screening will be every other year for grades 7 through 12. By doing the 7<sup>th</sup>, 9<sup>th</sup> and 11<sup>th</sup> grades every year all children in this age group will get screened every other year.

### Day Care Facilities

There are 1,200 Licensed Day Care facilities throughout the state with 7,200 children enrolled. To find the Licensed Day Care facilities in your town(s) you can go to [www.dhhs.nh.gov/](http://www.dhhs.nh.gov/), which is the website for the New Hampshire Department of Health and Human Services (DHHS). From the home page you can click on [Online Tools](#) and then on [Child Care Search](#). In the form you insert zip code or town, click search, and it returns a list of licensed. Entering 03440 for Antrim returned two facilities.

Program Name	Program Type	City/State/Zip	Phone
<a href="#">Antrim's Blossoms Early Learning Center</a>	Center Based Program License	Antrim NH 03440	(603) 588-2405
<a href="#">The Learning Vine</a>	Center Based Program License	Antrim NH 03440	(603) 588-2620



## Home Schooled

There are 5,914 home schooled children in New Hampshire. The New Hampshire Homeschooling Coalition functions as an important source of information <http://nhhomeschooling.org/>. It has two members on the Home Education Advisory Council (HEAC) which advises the NH Board of Education. Home education in New Hampshire is governed by RSA 193-A, which went into effect on July 1, 1991. Parents or legal guardians must contact a participating agency (in most cases, the local school superintendent or a participating private school) of their intent to home school.

Following are some options in how to reach home schooled children and make them aware of our Public eye screenings.

- The New Hampshire Homeschooling Coalition will allow us to post notices of public screening events so we can reach many of those being home schooled
- Checking with the SAU to see if they keep track of children being home schooled.
- Since home schooled children are frequent users of the library posters placed in libraries with the dates of public events where we will be doing screenings.

## Age Six Months to Pre-School

There will be a large number of children that will fall between six months old and daycare/school-age, that we also want to reach. One approach is to contact the Pediatricians and Family Practices in your area to have them promote our vision screening and recommend parents take their child to one of our public screenings.

## Public Screenings

The Lions should also set up public screenings where we can screen children over six months old, helping catch those children not in day care or public schools. These screening events would be ones that we can offer annually so that parents could rely on them to take their children to for a screening.

Examples of these types of events are the annual Home and Harvest Festival in Antrim every September, the Wellness Festival in Peterborough every September, catching children as they wait for Santa Claus, etc. We would also want to be prepared for ad-hoc opportunities that come up during the year where a large number of children would be attending a special event. Special Olympic events are huge opportunities for the Lions to screen folks who typically aren't easy to examine.

## Teaming

We have defined a role we use throughout this manual called Site Coordinator. This term applies to our primary contact at a school or daycare center, which could be a school nurse or Executive Director of a daycare facility. Once your target audiences have been identified it is time to meet with Site Coordinators to set up screening events.

If the question of HIPAA comes up you can state that we are HIPAA compliant. The Health Insurance Portability and Accountability Act of 1996 (HIPAA) protects the privacy of individually identifiable health information. We do that by deleting personal data from the Spot once we have completed the screenings. The results of the screening are given to the Site Coordinator to distribute to the parents.

## Preschool through Grade 12 – Site Coordinator (e.g. School Nurse)

It is recommended you contact the school nurse and set up a meeting with them. They are typically receptive to do screenings as they are usually enthusiastic to partner with Lions. There is a one-page (double-sided) *Vision Screening Important for Young Children* handout you can use for the meeting.

*Getting an agreement* - If there is no previous history of doing screenings with the school nurse the first page of the handout is designed to introduce them to the value of early screening. If the nurse already has experience with doing screenings (e.g. with SureSight) then you could then highlight the advantages of using the Spot. Once you have their agreement to set up a screening(s), the back side of the handout will outline their role in how screenings would be conducted.

*Determining the screening dates* - The school calendar is available on the NH Department of Education website - [www.education.nh.gov/](http://www.education.nh.gov/). By clicking on [NH Schools](#) you will be able to then click on [School Calendar](#) to find the dates when schools will be in session. Within that calendar the school nurse will provide a wide range of dates that are acceptable to do screenings. Based on the number of students in the school you can determine how much time is required (a rule of thumb is 40 to 60 students per hour in a school setting).

*Getting any required approvals* – If a school has never done any screenings, then you need to validate with the school nurse that the SAU and principal are OK with the planned screenings. The next step is to get approval of the Parental Consent Form (the SAU wants to make sure there is no commercial benefit being provided). Background checks are rarely required since we will be accompanied by the school nurse, teachers and other school personnel.

### **Daycare – Site Coordinator (e.g. Executive Director)**

Daycare facilities do not normally have a nurse as part of their team so a meeting with the Director of the day care facility would be the first step.

*Getting an agreement* - Once again, if they have no previous experience with Lions, then focusing on the front page of the *Vision Screening Important for Young Children* handout is warranted (the handout has been designed to work with school nurses and day care screening coordinators). The [Site Coordinator](#) in most cases will be the Director.

*Determining the screening dates* – There may not be one day of the week that is best to screen all the children as there may be different sessions for different ages, etc.

*Getting any required approvals* – The Director will provide the approval for screenings and the Parental Consent Form. If the day care facility has its own consent form it wishes to use, then both the facility's form and the Lion's form must be signed.

### **Pediatricians and Family Practices**

In order to address the six months to pre-school group, you would contact Pediatricians and Family Practices in your area so they would recommend Lions vision screening for any parents with young children. Pediatricians are not typically equipped to do the range of testing that we are able to provide with the Spot Vision Screener and hopefully they would welcome our help. We would leave them information about public screening events so parents could bring their children to one of our events.

There are a few ways to locate the Pediatricians and Family Practices in your area.

1. Contact your local Hospital as they should be able to provide you a list Pediatricians and Family Practices connected with their hospital.
2. UCompareHealthCare, LLC provides Web-based interactive tools for consumers to measure the quality of healthcare services available. The company provides information related to doctor reports, which include demographic information, education, area of specialty, certification, and disciplinary actions. Use the following link to search in your communities:

[www.ucomparehealthcare.com/drs/new\\_hampshire/](http://www.ucomparehealthcare.com/drs/new_hampshire/)

## Optometrists and Ophthalmologists

If the result of a screening indicates “**Complete Eye Exam Recommended**” or “**Screening Flagged**” Lions will emphasize that the child should be further examined by an eye care professional, such as an ophthalmologist (M.D.) or an optometrist (O.D.). Using the following websites you will be able to locate the ones in your area. These are the same websites listed on the Screening Results Letter that goes to parents/guardians after a screening.

- a. The [American Optometric Association](http://www.aoa.org/) (<http://www.aoa.org/>) represents approximately 36,000 doctors of optometry, optometry students and paraoptometric assistants and technicians.
- b. [www.healthgrades.com/ophthalmology-directory/nh-new-hampshire](http://www.healthgrades.com/ophthalmology-directory/nh-new-hampshire), which is a website provided by Healthgrades to help consumers find the right doctor and the right hospital, for the right care.

A recommendation is that each club meet the eye care professionals in their area and let them know that your club is conducting eye screenings and there may be children needing a **Complete Eye Exam**.

## Resources

It is recommended to have three Lions participate in each screening event. In most cases the schools and day care audiences are only done during the day, so you will need screeners who have daytime, weekday hours available. It is also recommend that there be three screeners for each event. The public screenings are usually night time or weekend events so more club screeners would be available.

### Training –

Training for the OKS Program will be conducted in December, 2014 and January, 2015. There will be additional training on an annual basis as part of the NH Lions Forum conducted each spring. Further individual training will be conducted by OKS Zone Coordinators and HSB trainers at various times and locations. District newsletters will provided date, time and location of upcoming training events.

### Support - TBD

### Online

The HSB OKS Operations Manual is available on the MD 44 website in two formats.

1. In PDF format available for downloading and printing. There are two PDF files, one for the main Chapters and one for the Appendix.
2. In HTML format as a readable document with your browser and hyperlinks to references, other websites, forms and handouts. There is also a index for all the forms and handouts that can also be downloaded.

### Feedback

Since the Spot and this manual are new to us, we are anxious to get your feedback so we can make improvements based on real world conditions. Please send your feedback to Scott Wilson at [scottwils@comcast.net](mailto:scottwils@comcast.net) so we can make the changes required to attain our goals, and make the screening experience easier, and have more fun.

# Event Preparation

## Reserving a Spot Kit

### Available Spot Kits

As of January 2015 HSB has purchased 15 new Spot vision screeners thanks to the matching grant from LCIF. The distribution strategy for the Spots is to have them conveniently located closer to the clubs to have them readily accessible for screenings and minimizing the hassle of driving long distances for any transfers. There are three categories for how MD 44 will be using the Spots.

1. There are Clubs and Zones who have decided to purchase their own Spot and will be responsible for their own reservations, operations and maintenance. In District 44N Zone 5 has purchased a Spot as have the Keene and Enfield clubs. In District 44H the Hudson and Wolfeboro clubs have purchased their own Spot.
2. The majority of the Spots purchased by HSB have been distributed to the Zones. The OKS Zone Coordinator is responsible for the proper care of the Spot and effective use in screenings. Reserving one of the Zone Spots is described below.
3. The initial two Spots that were purchased by HSB in early 2014 for each District will now be used for training and backup in case of repair or malfunction of a Zone Spot.

### Reserving a Spot

There are two HSB Spot Reservation Coordinators, one for each District, as listed below.

Tom Geno - Spot Reservation Coordinator for 44N  
Cell: 603-848-3364  
Res: 603-783-3365  
Email: cmegonh@gmail.com

Bob Laferriere – Spot Reservation Coordinator for 44H  
Cell: 603 548-7812  
Res: 603 329-8330  
Email: f.laferriere@comcast.net

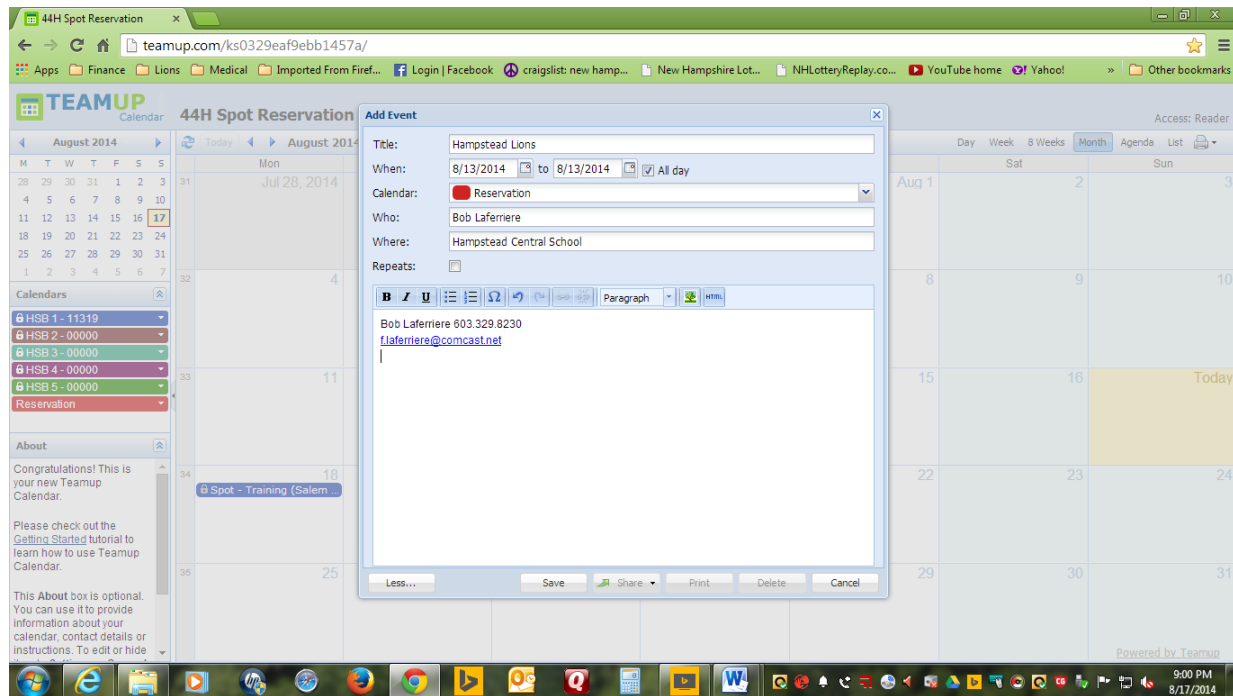
To reserve a Spot Kit click on the link for your District below to be taken to the Spot reservation calendar and then follow the steps outlined below. As of January 1, 2015 there is a usage cost of \$0.20 per screening for using a Zone Spot. This usage cost will be review twice a year, in January and July, and will be adjusted as required. The cost should be coming down as we begin to ramp up the number of screenings that are done.

District 44N - <http://teamup.com/ks4305de55a033dad5/>

District 44H - <http://teamup.com/ks0329eaf9ebb1457a/>

1. Look for the dates you would like to reserve a Spot Kit.
2. Click on a date and a popup window will appear, (a red calendar reservation will appear)
3. On **Title Line**: enter club name
4. **When**: select the date or dates
5. **Who**: OKS Club Coordinator's name
6. **Where**: where the screening will be held

7. Click **More**: enter name, telephone numbers and email for contact
8. Click **Save**: send email to Spot Reservation Coordinator that you reserved a screener kit



The Spot Reservation Coordinator will respond to your email to confirm your reservation.

Once your reservation has been confirmed, use the same link to verify that a screener has been reserved for you in the calendar. Your reservation will be changed to a different color. When you receive the Spot Kit you will need to complete and sign a **Spot Usage Transfer Form**.

## Helpful Information

- For an introduction to the Spot Vision Screener <http://www.spotvisionscreening.com/wa/>
- For detailed information on use of the Spot, link to the manual [www.welchallyn.com/content/dam/welchallyn/documents/sap-documents/LIT/20126/20126LITPDF.pdf](http://www.welchallyn.com/content/dam/welchallyn/documents/sap-documents/LIT/20126/20126LITPDF.pdf)
- USB drives – It is suggested that each club purchase multiple 8 GB USB drives, as one is required for each screening event scheduled during your reservation period. Each Site Coordinator will require the use of a USB drive, at least one week prior to the screening event.
- You will need paper to print out the *Screening Results Letter* needed for each screening.
- You will need envelopes to give to the Site Coordinators for them to send the *Vision Screening Summary* home. HSB is in the process of designing and printing the envelopes that have a professional look and provide visibility for our Lion's Clubs.
- Depending on the number of screenings you do (it is estimated that ink cartridges can print around 250 Vision Screening Summaries) you may need to purchase additional ink cartridges.

## Club Administration

### Customizable Forms

Two customizable forms need to be created prior to any screening event. (Examples of all forms are available in the Appendix.) One is the Consent Form, which has to be signed by the parent/guardian prior to any child being screened. The second is the Screening Results Letter, which is included with the Vision Screening Summary (the printout from the Spot screening) that goes to the parent/guardian.

#### Consent Form

- A **Consent Form** is required for each child being screened who is younger than 18 years.
- The **Consent Form** is a Word document that allows you to enter your club name, contact information and screening date.
- For a school, the **Consent Form** needs to be approved by the SAU before it gets distributed to the parents/guardians. This approval typically requires a two-week turnaround time and is primarily to prevent trying to gain a business benefit for any school activities.
- For a daycare facility, the **Consent Form** needs to be approved by the Executive Director.
- For school and daycare events, the Consent Forms are returned to the Site Administrator after screening, whereas for public and other events, the club needs to retain them.

To customize the **Consent Form** the following should be done.

1. Replace club name at the top of the form with the name of your club.
2. To the right you provide the contact information for any questions that may come up regarding the **Consent Form** by replacing contact name, contact email and contact telephone with the contact person for your club.
3. Replace Date range of screening with the week that you are doing screenings. It is better to give the week as opposed to a specific date as many times the date of screenings will get shifted.

#### Screening Results Letter

- There are two Screening Results Letters. Each is a Word document that allows you to enter club-specific information.
- **Screening Results Letter (option A)** only includes links to American Optometric Association for Optometrists and Health Grades for Ophthalmologists. To customize the following should be done.
  1. Replace club name at the top of the form with the name of your club.
  2. In the last paragraph you need to replace club name, name, email and telephone with your clubs information.
- **Screening Results Letter (option B)** in addition to links to American Optometric Association for Optometrists and Health Grades for Ophthalmologists you can also provide a list of up to six Optometrists and five Ophthalmologists in your local area. This option is useful in areas where there are limited choices and having a list available makes it easier for the parent to contact an eye care professional. You should list at least three in each category and by no means does this mean an endorsement of the listed eye care professionals. To customize the following should be done. In addition to the changes made for option A.
  1. For each eye care professional you wish to list just replace the Click here to enter text with name, location and contact information.
  2. For any unused lines you will need to replace Click here to enter text with a space.
- Remember that we are not to discuss the results of screenings with parents or custodians other

than Pass or Referred.

## Publicity Plan

- For a school or daycare event, we should encourage the Site Coordinator to publicize the event on their sites' website, newsletter, bulletin boards and any other means available to them.
- For a public or other event, you are responsible for the publicity. Some suggestions for promoting these events are: local newspapers, local TV, radio, posters, Chamber of Commerce, create a Facebook event and use other social media.

## Rewards

It is strongly recommended that you reward each child for their participation in the Vision Screening process. This is also another way for your club to publicize the good work that they do for their community.

The easiest reward to provide is a **Lions Coloring Page**. Other reward ideas the club might use are

- Stickers – Lions or another type as these work well with younger children
- Temporary tattoos for older elementary children
- Crossword puzzles, etc., for middle and high school students.

## Insurance Certificate for Events

Lions Clubs have insurance for any event they conduct, but occasionally the Site Coordinator may want to see proof. In that case the **OKS Club Coordinator** can download an insurance certificate to give to the Site Coordinator. To do this you go to the LCI website to download a Certificate of Insurance, which is at the following url:

<http://www.lionsclubs.org/EN/member-center/resources/certificate-of-insurance-13-14.php>

## Background Checks

Background checks are rarely required as Lions will be accompanied by school or daycare personnel during the screening of children. If for some reason a background check is required:

- Check to see what their procedure is and follow it for each Lion who will be part of the screening.
- If they do not have their own procedure then you can use the State of New Hampshire procedure, an example of is included in the Appendix. To make sure you have the latest form you need to go to the **NH website**.

**Please note** Lions and volunteers should never be left alone with children.

## Site Coordinator

### What the Lions Need To Provide

About four weeks before the screening event you should be in contact with the **Site Coordinator** to start the preparation work. It is recommended that you meet with the Site Coordinator in person to go over the following:

- Confirm dates, time and location for the screening event.



- Deliver Consent Forms at least four weeks prior to the screening event. If you are not able to do it in person, the form could be emailed or faxed, and the Site Coordinator could make sufficient copies. Four weeks lead time is required, as:
  - It generally takes two weeks for SAU approval
  - The Site Coordinator needs two weeks to distribute and receive signed Consent Forms back from the parents/guardians. Ideally, the Site Coordinator should have all signed Consent Forms two days prior to screening.
- Deliver USB drive
  - A USB drive needs to be delivered (preferably by the Club Lead Screener) to the Site Coordinator. If the Site Coordinator will not be loading the data onto the USB, they need to identify who will be doing it, as you may need to meet with that person.
  - Provide clear instructions as to how the data will be loaded onto the USB, and leave the [USB Instruction Sheet](#).
- Leave examples of the Screening Results Letter and Vision Screening Summaries.

A day or two prior to the screening validate that the SpotSubjects.csv file is properly loaded on the USB drive. Leaving validation to the day of the screening might force a delay or lead to having to resort to a manual procedure.

### **What the Site Coordinator Needs To Provide**

- Signed Consent Forms for each student to be screened
- The USB drive with the required information for each child to be screened
- A printout from the CSV file of all children who will be screened. This will be used by the Lions as a checklist during the screening event to:
  - Confirm that each child to be screened has a Consent Form.
  - Verify that all screened children have printed results
  - Indicate on printout all children to be referred for a professional eye examination

This list is to be used only during screenings and will be returned to Site Coordinator at the end of the event.

### **Public or Other Event**

- Confirm the location to be used.
- Print out the Manual Screening List form for keeping track of who has been screened.

## **Final Preparation**

### **Getting the Spot Kit**

The OKS Zone Coordinator will monitor the movement of the Spot within the Zone and verify everything is in working order. Transfers of the Spot Kit can be done between the OKS Zone Coordinator and a club or between two clubs. The time and place of the transfer needs to be determined so that the Receiver can make sure the Spot and printer are in working order and everything is included per the Checklist.

- The Receiver needs to check the contents of the Spot Kit using the checklist on the [Spot Usage Transfer](#) form. If something is not in proper working order or missing write in what the problem is in the Comment field. It is the responsibility of the Receiver to make sure everything is in proper working condition. This can be done in an automobile if necessary as an inverter is provided to provide power to the Spot and/or the printer.



- Make sure the Spot Queue and History data has been deleted from any previous screenings.
- After completing the [Spot Usage Transfer](#) form send a copy to your OKS Zone Coordinator and retain a copy in your OKS Club Coordinator records. Copy can be sent by photo from a camera enabled phone or scanned and sent by email or mailed to the OKS Zone and Club Coordinators address
- You will need to return the Spot Kit with new unopened ink cartridges. Ink cartridges can be obtained from Staples.

### **Overall Readiness**

- Make sure the Spot is fully charged.
- Confirm with Lions screeners - time, place, parking, roles, dress (vests, hats, shirt and badges).
- Print the required number of customized *Screening Results Letters*.
- Bring envelopes.
- Bring *Screening Event Summary* forms as these need to be completed right after the screening event.
- Bring the rewards you have decided to use, the default being the Lions coloring page.

# Screening Event

## Arrival

### Check In

Arrive at least 10 minutes prior to the scheduled meeting with the Site Administrator which is held prior to beginning the screenings (schools normally have you sign in at the Principal's office). Gather outside as a group, and enter when all Lions have arrived to avoid repeated disruptions to school or facility staff.

- The meeting with the Site Administrator, preparing the room and getting the Spot and printer set up usually takes up to 30 minutes.
- Following the proper check-in procedure is critical, due to safety and confidentiality concerns, especially at schools and child care centers.
- Register or sign in as directed and meet with the Site Coordinator, who will escort the screening team to the room where the screenings will be done.
- Get the USB drive, printed Master List and *Consent Forms* from the Site Coordinator.
- Once the Lions are in the room provided the Lead Screener should verify that the USB drive is properly loaded while the other two Lions work on Room Setup and Spot Setup.

### Verification of USB Drive

Be prepared to verify that the SpotSubjects.csv file is in the proper format in the root directory of the USB drive. If you are unable to transfer the data electronically, extra time will be needed to manually enter the data into the Spot.

- Press the Power On button on the Spot, and allow a few seconds for it to boot up.
- Insert the USB drive into the USB port on the Spot.
- From the **Tools** menu, select **Import/Export**. When the USB drive has been detected, the **Import** and the **Export** buttons should be available.
- If the **Import** button does not highlight within five seconds of inserting the USB drive, remove the USB drive and do the following.
  - Insert the USB drive into a PC and delete all files from the drive
  - Open the original Excel file on the PC and check that the file contains the required six columns for Subject ID, First Name, Last Name, Date of Birth, Gender and Eyewear. Scan the data to make sure the subject data is filled in correctly (e.g. no punctuation in names, year formatted as MM/DD/YYYY).
  - After you have made any required corrections you can then save the new SpotSubjects.csv on the USB drive.
  - Now insert the USB drive back in the Spot to verify it can now **Import** correctly.
- Once it becomes available, select **Import**. After the file has been imported, you need to select the **X** in the upper left corner twice to get back to the **Home** screen. You should now be able to select **Queue** and view the list of subjects.
- At this point you can take the USB drive out of the Spot now that the data is loaded on the Spot.

For Public and Other Events and any School or Daycare Event where the USB drive procedure is not able to be used then the Manual procedure should be used. The Manual Screening List form can be used to keep track of who has been screened.

### Room Setup

Setting up the room to achieve the most effective screening results may require rapid analysis of the strengths and weaknesses of the available facilities.

- Check for the best location within the room for carrying out the screening. The room light should be dim, and neither the child nor the screener should be looking toward a window or light. Curtains or blinds should be drawn. Heat-generating light bulbs, such as incandescent and halogen bulbs should be avoided.
- Determine the relative positions of the child and the screener. The child may be asked to sit on a chair or stand against a wall. Place a piece of tape 3' in front of the child's position to mark where the Screener will sit or stand. The goal is to find a comfortable position which the Screener can hold while the children are shuttled in and out or circulated through the screening area.
- If space allows, it can also be helpful to establish space for the next child or two in line, so they are familiar and at ease with the process when it is their turn.
- Set up a table to hold the printer, consent forms, and rewards. The printer requires an electrical outlet, but does not have to be located in the screening room, as long as it is within about 20' of the Spot. Rewards should always be offered upon completion of screening.

### Spot Setup

Set up the Spot and printer and verify that the system is working before the actual screening begins. The following steps should be taken once names are loaded into the Spot.

- Do a Test Screening to ensure that the entire system is working.
  - From the **Home** screen, select **Start**; you don't have to enter name, but you do need to enter gender and a DOB; then select **Go** to do screening.
  - After screening, **Print** the *Screening Summary*.
  - To get rid of the test screenings, view **History**, **Clear All**, **Delete All Records**. (Deleting the **History** records will not affect the Queue of subjects that you are getting ready to screen.)
- On the printed *Master List* of names of children to be screened, manually add three columns. Label the first column "Signed Consent," the second column "Results Printed," and the third column "Referral/Flagged."
- For each Consent Form "in hand", place a check mark in the "Signed Consent" column for that child. We can only screen those children with a signed parental Consent Form.
- Set up the printer, turn the power on and load the pre-printed *Letter to Parent* forms into the printer in the correct orientation having the printing face up and the top of the page inserted into the printer. The *Screening Summary* will then be printed on the opposite side.
- Verify sufficient pre-printed *Letter to Parent* forms for the number of children to be screened and sufficient envelopes for sending the results home, if necessary.
- If the names and personal information for those to be screened have already been loaded into the Spot, verify that the correct data set is in the queue. All names will be in alphabetical order by last name. For any late-arriving consent forms, the names and personal information can be added manually to the queue.
- If using the Manual process where a USB drive is not being used then:
  - The screening process can be initiated by selecting **Start**.
  - Subject data must be entered into the spot manually. Gender and Date of Birth must be entered into the Spot. First and Last Name can be entered into the Spot or alternatively manually written on the *Screening Summary* after it is printed.
  - The rest of the instructions would be the same.

### Ready to Go

- Verify with the Site Coordinator how the children will be queued for screenings. It will generally be a class at a time. However, the Site Coordinator may prefer to bring younger children in smaller groups.

- Identify the screening roles to be played by the Lions volunteers. Generally, one Lion (the Screener) will operate the Spot, one (the Coordinator) will work with the Site Coordinator to move the subjects from the waiting area into the screening position and then on to the rewards table, and one (the Paper Handler) will keep track of the paperwork. Unless subject data was not previously loaded on the Spot from a USB drive, the subjects can be rapidly shuttled in and out while the results are printed.

## Screening

The secret to efficient screening, and thus minimal disruption to the school day, is achieving a rapid flow of children through the screening process. As much as possible, the Screener stays in position to maintain the ideal screening distance. The children are circulated through or shuttled in and out, with one at the rewards table, one being screened, and one “on deck” at all times.

## Queuing/Flow

All the names loaded in the Spot Queue will be in alphabetical order by last name. The children are more likely to come by class or in even smaller groups.

- Ask that the children be lined up in approximate alphabetical order in the group, to speed up searching for names in the Spot Queue.
- Fears can also be reduced by having those waiting watch those ahead of them getting screened, rather than bringing the subjects into the room one at a time.

## Screen Child with Spot

When children are in the room make sure the Site Coordinator (or designee) is in the room with screeners. If that is not possible then make sure there are at least two Lions in the room.

- One Lion, the Coordinator, escorts the child to the correct standing or sitting position.
- The Screener selects the child’s name from the Queue, verifies the personal information and begins screening by pressing **Go**, while in position, approximately 3 feet, in front of the child. Slowly, rotate the Spot upward to meet the subject’s eyes, and rock slightly forward or backward until the screen turns grey, indicating you are in the capture range. Hold the Spot steady until the screening wheel appears, indicating the capture process is under way.

Note: If a child is wearing glasses then they should be wearing them for the screening.

- If the Spot notifies you that the pupils are too small, try reducing the lighting in the room.
- If a subject is wearing eyeglasses the screening should be done wearing them.

## Results

The capture process is complete when the results appear on the screen, and the child can be released from the screening position and offered a reward. The data is automatically saved in the Spot History, but it is convenient to send the results to the printer as they are obtained.

- When the results screen appears (if results cannot be obtained for a subject, the Screener should select **Flag**), the Screener indicates that the test is finished, and the Coordinator guides the screened child to the rewards table and the waiting child into position for the Screener.
- The Screener aims the Spot toward the printer and presses **Print** on the operation screen to send the results to the printer. There is a lag in printing (total printing time is about 35 seconds), but there is no need to wait for the printout before moving on to the next child. It is more efficient to continue the screening process and gather the printed results as they come out. As long as the names and personal information are loaded in the Spot Queue, the subject’s

name will be printed on the *Screening Summary* page, and printed results can be verified for all before leaving.

- As each *Screening Summary* comes out of the printer, the Paper Handler must insert a check in the Results Printed column of the Master List.
- For a School or Daycare Event as the results for each subject are obtained from the printer the Paper Handler needs to
  - make a check mark in the “Results Printed” column in the Master List of names.
  - add ‘R’ in the “Referral/Flagged” column for **Complete Eye Exam Recommended** and ‘F’ for **Screening Flagged**. For both of these results a professional eye exam is recommended.

Note: If the result is **Screening Complete** then no follow up with an eye care professional is needed.

- For a Public or Other Event as the results for each subject are obtained from the printer the Paper Handler needs to
  - Give the *Vision Screening Summary* to the parent of the child that has been screened.
  - If the screening result is either **Complete Eye Exam Recommended** or **Screening Flagged**, a second printout should be printed and kept by the Lions for backup in case the parent loses the result.
  - Manual Screening List form should be updated with the person that has just been screened.

Note: A fully charged Spot should last through most screening events. However, if the Spot loses charge, it can be plugged in and used with the power cord for the remainder of the screening.

## Wrap-up

Once the screenings are completed and all the results have printed the Lions volunteers will verify that screening results have been printed out for each child, export a data summary without personal data, delete all data from the Spot, and complete a *Screening Event Summary* form.

## Verify Screening Results

Check to see that there is a printout for each child screened before deleting any data from the Spot. If a printout is missing for any child who was successfully screened, the results are stored in the Spot History, and can be reprinted.

## Saving Screening Event Data

- Insert the USB drive into the Spot.
- From the **Tools** menu, select **Import/Export**.
- Select the **Export** button. You will be asked whether or not to exclude personal data. The **Exclude Personal Data** function will export a file with all screening data, except the subject's first name, last name, and date of birth (converted to months).
- Press the box to the left of **Exclude Personal Data** button on the screen and an **X** will appear in the box.
- Select the **Export** button, and do not remove the USB drive until the export is complete.
- Spot will indicate **“Export Finished Successfully”** when the export completes. Select **OK**, and it is then safe to remove the USB drive.

*If the USB is withdrawn prior to the export being complete, incomplete or corrupted data may be the result. This may cause problems with both the Spot and your USB drive.*

## Deleting Personal Data

According to HIPAA regulations and for privacy concerns, we will export screening data onto the USB drive excluding personal information, delete all data on the Spot and the original **SpotSubjects.csv** on the USB drive

As a result of the **Export** the Spot will have created a folder on the USB drive called:

**Spot\_Serial Number\_YYYYMMDD\_HHMMSS.**

In this folder there will be a folder named '**db**' that contains two files:

**SpotResults.csv**

**SpotResultsExtended.csv**

These are the two files that contain all the screening data for the subjects that have just been screened. The **SpotResultsExtended.csv** will be the file that is sent to the HSB OKS Coordinator for your District. There will also be a folder simply named **Spot\_Serial#** with a subfolder '**db**'. This folder contains system files that are not of interest to us. Still remaining on the Spot is the original **SpotSubjects.csv** that was created by the Site Coordinator that needs to get deleted.

For a School or Daycare Event the following steps should be witnessed by the Site Coordinator.

- You will need to go to a PC with the Site Coordinator.
- Show that the exported files on the USB drive do not contain any personal information.
- Delete the original file - **SpotSubjects.csv**. After deleting this file verify that the exported files are still on the USB drive.
- Once you have verified the exported file is there it is now safe to delete all data from the Spot. This sequence is important in case the exported file accidentally got deleted you could do another **Export** to re-create the file.
- To delete the data on the Spot:
  - View **Queue** then **Clear All** and **Delete Queue** (The only people left in the queue should be those who didn't show up for screening. If Queue is not available for viewing, it means it is empty.)
  - View **History** then **Clear All** and **Delete All Records**

## Complete Screening Event Summary Form

You need to complete the *Screening Event Summary* form before leaving the premises, in order to make use of the Master List to get the final numbers.

- Identify the type of event and location.
- Identify the Lions Club(s) performing the screening.
- From the Master List, total up the # Screened, # Referrals, # Flagged and record those numbers on the *Screening Event Summary* form.

For a School or Daycare Event the following needs to be provided to the Site Coordinator:

- Return the *Consent Forms* - the Lions will not keep any of these forms, the Site Coordinator will keep in their own files.
- Return the notated *Master List* – This will be used by the Site Coordinator to follow up with any parents receiving referrals.
- All *Screening Summary* printouts (with the *Letter to the Parent* on the reverse side.) The Site Coordinator will send the originals home to parents and may make copies of any children that are Referred or Flagged
- A sufficient number of envelopes for the Site Coordinator to use in sending the results home.

For a Public or Other Screening event, the Lions need to do the following.

- *Consent Forms* - the Lions will keep any of the forms that resulted in a **Complete Eye Exam Recommended or Screening Flagged**. All other *Consent Forms* will be destroyed.
- *Manual Screening List* – Keep this list as it provides a summary of the number screened and the number of referrals.
- *Screening Summary* – these have already been given to the parent. The extra printout that was previously printed for any **Complete Eye Exam Recommended** will now be attached to the proper *Consent Form* and kept by the club for follow-up.
- To insure HIPAA compliance the *Consent Form* and *Vision Screening Summary* must be secured by the OKS Club Coordinator until after the referrals have been completed. Shred all documents after the screening process is complete.

## Wrap-up/Reporting

### Returning Spot

The same procedure as described earlier in getting the Spot for a screening should be followed when transferring to the OKS Zone Coordinator or another Club when finished with the Spot.

- The Receiver needs to check the contents of the Spot Kit using the checklist on the Spot Usage Transfer form. If something is not in proper working order or missing write in what the problem is in the Comment field. It is the responsibility of the Receiver to make sure everything is in proper working condition. This can be done in an automobile if necessary as an inverter is provided to provide power to the Spot and/or the printer.

### Report to District

For all events the *Screening Event Summary* and the *SpotResultsExtended.csv* file need to be emailed to the HSB OKS Coordinator. If you are unable to scan the *Screening Event Summary* form and email you will need to use postal mail to send in the hardcopy.

For Public and Other screening events your club OKS Coordinator will keep the *Consent Forms* in addition to a *Vision Screening Summary* for any **Complete Eye Exam Recommended** or **Screening Flagged result**. This second printout of should be stapled to the Consent Form and kept by the Lions for backup in case the parent loses the result. This paperwork should be stored in a safe secure fashion until the child has been seen by an eye care professional and then destroyed or if there is no follow up by the parent within six months.

### Thank You

A week after the screening event a summary of screening results and *Thank You Letter* should be sent to the Site Coordinator from the OKS Club Coordinator. The letter should thank them for participating in OKS and include the number of children screened/referred. It can also include a reminder that the Site Coordinator would call parents of referrals to make sure they received results and answer any questions they have.

For a Public or Other event a *Thank You Letter* should go to the person who provided the space for the screening.

### Referral Follow-up

In four to six weeks the OKS Club Coordinator should follow up with the Site Coordinator to find out the status of the children that were referred, if they did go to an eye care professional and what the outcome was.

For Public or Other events the OKS Coordinator will check the status of the children that were referred, if they did go to an eye care professional and what the outcome was. The OKS Coordinator should have *Consent Forms* and *Vision Screening Summary* for those that were referred.

### Publicity

Contact local media for story about screenings conducted by local Lions.



# Appendix

## OKS Roles

### HSB

1. Spot Reservation Coordinator - There is one for each District and is responsible for reservations of the Spots and coordinating effective usage of the Spots across the Zones. They will also be responsible for any HSB controlled Spots that would typically be used for training and backup to Zone Spots. The Zones that own their own Spot will manage their own reservations.
2. HSB OKS Coordinator 44N - Responsible for the collection of the Screening Event Summary forms and .csv files. Provides quality control on all data collected and makes sure follow-ups have been done on all referrals.
3. HSB OKS Coordinator 44H - Responsible for the collection of the Screening Event Summary forms and .csv files. Provides quality control on all data collected and makes sure follow-ups have been done on all referrals.

### HSB, Zone or Club

1. OKS Zone Coordinator - For the Zones that have purchased a Spot and other Zones using a HSB owned Spot the OKS Zone Coordinator is responsible for maintaining the Spot Kit, movement of the Spot from Zone to Club and Club to Club. They will lead in the development of Club plans and address common issues across clubs.

### Club

1. OKS Club Coordinator. Will work with the HSB to create and/or expand a vision screening program in and around the Lions Club's home community. The coordinator will answer any follow-up questions from parents and others being screened as a result of the screening.
2. Lead Screener – This requires club members with a technology background that can help get the USB drive created, load it on the Spot, handle any technical issues with the Spot and printer, be familiar with Excel and be responsible for reporting screening event results to the District.
3. Screener - Club members that can do screenings with the Spot, organize the people to be screened, handle all paperwork required, provide rewards to the children and provide a cheerful disposition while screening.

### Schools and Daycare Centers

1. Site Coordinator – This is our primary contact where we conduct screenings. They are responsible for determining screening dates, getting Consent Forms approved and signed by parents/guardians, providing the room for screenings and following up on referrals.

## Summary of Forms

### Club Preparation

1. *Club Planning Template* - A template that each club can use as a starting point to create their own yearly vision screening plan. The template is in Microsoft Word format with links to online resources to (e.g. NH schools and Daycare Centers)
2. *Vision Screening Important for Young Children* - Vision Screening overview to be used when meeting with Site Coordinators (e.g. School Nurses and Daycare Directors)

### Event Preparation

1. *Consent Form* – Every child screened needs to have a Consent Form is signed by their parent/guardian. This is customizable by each club to include name of club, screening date and contact information.
2. *Screening Results Letter Option A* - Letter to be distributed to parents along with the printout of the screening results. One letter covers either a referral or no referral.
3. *Screening Results Letter Option B* - Letter that can be customized to add local Optometrists and Ophthalmologists.
4. *Vision Screening Summary* - Samples of screening results from the Spot - one for [Screening Complete](#), [Complete Eye Exam Recommended](#) and [Screening Flagged](#)
5. *USB Drive Instructions* - An instruction sheet for Site Coordinators on how to load the USB drive with the children to be screened.
6. *Manual Screening Sheet* - Used to keep track of people screened when the USB drive approach is not able to be used. Primarily used for Public and Other Events.
7. *NH Background Check* - Background Checks using State of NH forms
8. *Spot Usage Transfer Form* - This is an agreement between two entities (OKS Zone Coordinator and/or Club) on the transfer of the Spot Kit. This form includes a checklist of all the items contained in the Spot Kit and verification everything is in working order.

### Screening Event

1. *Screening Event Checklist* – A one page summary of the key steps needing to be done for a Screening Event.
2. *Screening Event Summary 44N* - A summary of the screening event with the # of children screened, # referred, event, club, etc. that will be sent to the District
3. *Screening Event Summary 44H* - A summary of the screening event with the # of children screened, # referred, event, club, etc. that will be sent to the District
4. *Lions Coloring Page* - A file that can be printed and handed out as a reward for children that have been screened.

### Wrap-up/Reporting

*Thank You Letter* - Letter to Site Coordinators thanking them for arranging the screening(s), reminding them of following up on referrals.