

AI Bootcamp: Advanced Concepts and Practical Use

2 hours

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Description:

This advanced course shows optometrists how to use AI's overlooked file-handling and productivity features. Participants learn to upload, analyze, and generate patient education materials, marketing content, and practice documents. The workshop focuses on practical applications such as managing Google Reviews, using Chrome extensions for EHR tasks, organizing workflows with Claude Projects, and creating professional, ready-to-use materials. The course is fully standalone and does not require completing the beginner workshop.

Learning Objectives:

- Upload and analyze files using AI tools to create customized patient education materials, marketing content, and practice documents
- Organize AI workflows using Claude Projects to maintain context and improve efficiency across multiple practice areas
- Generate professional responses to Google Reviews (positive and negative) that enhance practice reputation
- Implement Chrome extensions and browser-based AI tools for real-time EHR assistance and webpage analysis
- Create and download ready-to-use documents, spreadsheets, and web content for immediate practice implementation

Course Outline:

(8 minutes)

- I. Quick Review of AI Fundamentals
 - a. What AI is and isn't
 - i. Large language models explained
 - ii. Key capabilities and limitations
 - iii. Common misconceptions
 - b. Basic prompting refresher
 - i. Clear instructions and context
 - ii. Specifying desired format and tone
 - iii. Providing examples for better results
 - c. Working with file uploads in prompts
 - i. How to upload files to ChatGPT and Claude
 - ii. Supported file types (PDF, Word, Excel, images)
 - iii. Prompting with uploaded content
 - iv. File size and page limitations
 - d. Creating downloadable files
 - i. Requesting specific file formats

- ii. Downloading and saving AI-generated materials
- iii. File compatibility and editing considerations

(7 minutes)

II. Brief Overview of Advanced AI Concepts

- a. Multi-step reasoning and chain-of-thought
 - i. Breaking complex tasks into steps
 - ii. Asking AI to show its work
- b. Role assignment in prompts
 - i. Examples: optometry educator, marketing expert, patient advocate
 - ii. When role assignment improves outputs
- c. Context management for complex tasks
 - i. Maintaining conversation continuity
 - ii. When to start new conversations
- d. Iterative refinement techniques
 - i. Building on previous outputs
 - ii. Providing feedback for improvements

(10 minutes)

III. Organizing Work with Claude Projects

- a. What are Claude Projects
 - i. Dedicated workspaces for specific tasks
 - ii. Persistent context and memory within projects
 - iii. Custom instructions and knowledge bases
 - iv. Differences from regular Claude conversations
- b. Setting up Projects for optometry workflows
 - i. Patient education project
 - 1. Standard terminology and reading levels
 - 2. Practice-specific contact information
 - ii. Marketing and social media project
 - 1. Brand voice and messaging guidelines
 - 2. Target audience demographics
 - iii. Clinical documentation project
 - 1. Practice documentation standards
 - 2. Common referral patterns and templates
- c. Uploading reference materials
 - i. Practice style guides and protocols
 - ii. Brand guidelines and logos
 - iii. Template documents and forms
 - iv. Existing marketing materials for consistency
- d. Benefits and best practices
 - i. Consistency across all outputs
 - ii. Time savings through context retention
 - iii. Team collaboration possibilities
 - iv. Organizing multiple practice initiatives
- e. Live demonstration
 - i. Creating a new project
 - ii. Adding custom instructions

- iii. Uploading reference documents

(15 minutes)

IV. Managing Google Reviews with AI

- a. Responding to positive reviews
 - i. Crafting personalized, authentic responses
 - ii. Maintaining consistent brand voice
 - iii. Highlighting specific services mentioned
 - iv. Examples and demonstrations
- b. Responding to negative reviews professionally
 - i. De-escalation techniques and empathetic language
 - ii. HIPAA-compliant responses without revealing PHI
 - iii. Turning complaints into opportunities
 - iv. When to take conversations offline
 - v. Examples and demonstrations
- c. Prompt templates for review responses
 - i. Creating reusable prompt templates
 - ii. Customizing for different review types
- d. Hands-on practice
 - i. Participants generate review responses
 - ii. Group feedback and refinement

(15 minutes)

V. Creating Patient Education Materials

- a. Generating custom education sheets
 - i. Common conditions (dry eye, glaucoma, cataracts, AMD)
 - ii. Post-procedure instructions (YAG, injections, minor surgery)
 - iii. Medication instructions and compliance tips
 - iv. Contact lens care and hygiene
- b. Formatting for different audiences
 - i. Reading level adjustments (6th grade, 8th grade, technical)
 - ii. Multi-language materials (Spanish, other languages)
 - iii. Age-appropriate content (pediatric vs geriatric)
- c. Creating downloadable documents
 - i. Word documents for easy editing
 - ii. PDFs for distribution and printing
 - iii. Adding practice branding and contact information
 - iv. Print-ready materials with proper formatting
- d. Demonstration and hands-on practice
 - i. Live creation of patient education material
 - ii. Participants create their own materials
 - iii. Download and review outputs

(10 minutes)

VI. Chrome Extensions and Browser-Based AI Tools

- a. Overview of available extensions
 - i. Page monitoring and summarization tools

- ii. AI assistants that work within web pages
 - iii. Popular extensions for healthcare professionals
- b. EHR integration capabilities
 - i. Real-time documentation assistance
 - ii. Summarizing patient encounters
 - iii. Privacy and security considerations with PHI
 - iv. HIPAA compliance requirements
- c. Webpage analysis and content extraction
 - i. Analyzing competitor websites
 - ii. Research article summaries and key findings
 - iii. Extracting contact information and details
- d. Live demonstration
 - i. Installing and configuring extensions
 - ii. Practical use cases in optometry

(15 minutes)

VII. Website and Social Media Content Creation

- a. Uploading existing website content for analysis
 - i. Content audit and improvement suggestions
 - ii. SEO optimization recommendations
 - iii. Readability and engagement analysis
- b. Rewriting and adapting content
 - i. Professional web pages and service descriptions
 - ii. Blog posts and educational articles
 - iii. About us and provider biography pages
 - iv. FAQ sections and patient resources
- c. Social media content adaptation
 - i. Converting long-form content to social posts
 - ii. Platform-specific formatting (Facebook, Instagram, LinkedIn)
 - iii. Creating content calendars and posting schedules
 - iv. Hashtag strategies and engagement tactics
- d. Marketing materials and campaigns
 - i. Email marketing campaigns
 - ii. Promotional flyers and announcements
 - iii. Seasonal campaigns (back to school, eye health month)
- e. Hands-on practice
 - i. Participants upload and rewrite their own content
 - ii. Create platform-specific social media posts

(10 minutes)

VIII. Specialized Optometry Applications

- a. Drug interaction checking
 - i. Using AI to verify medication compatibility
 - ii. Patient-specific contraindications
 - iii. Limitations and verification requirements
 - iv. When to use traditional drug databases
- b. Contact lens calculations
 - i. Complex calculations and conversions

- ii. Product recommendations based on parameters
 - iii. Troubleshooting fitting issues
- c. Spreadsheet analysis and creation
 - i. Uploading practice data for analysis
 - ii. Financial reports and revenue analysis
 - iii. Scheduling optimization and capacity planning
 - iv. Creating custom spreadsheets and templates
 - v. Inventory tracking and ordering systems
- d. Brief demonstrations
 - i. Sample calculations and analyses
 - ii. Downloadable templates for practice use

(10 minutes)

- IX. Key Takeaways and Implementation Strategy
- a. Prioritizing AI applications for your practice
 - i. Quick wins vs long-term projects
 - ii. ROI considerations and time savings
 - iii. Staff training and adoption strategies
 - b. Getting started checklist
 - i. Essential tools to set up immediately
 - ii. First projects to tackle
 - iii. Building prompt libraries and templates
 - c. Resources and continued learning
 - i. Online communities and forums
 - ii. Recommended tutorials and courses
 - iii. Staying current with AI developments

(10 minutes)

- X. Questions and Discussion
- a. Open forum for participant questions
 - b. Practice-specific implementation advice
 - c. Troubleshooting common challenges
 - d. Additional resources and contact information