

# TeamVision

## PATIENT JOURNEY

 **Team Member or Patient Books Exam**  
Book appointments in Eclips Scheduler, also known as The Appointment Book (TAB).

▶ [Video: Scheduling within Eclips](#)



### Digital Intake Form (DIF)

TAB auto sends 72 hours prior, team member calls patient to inform of new process 24 hours prior, site can push text or email (before or at check-in) or fill out for patient.

▶ [Video: Digital Intake Forms](#)



### Open & Close

- ▶ [Video: Opening Ciao! Optical](#)
- ▶ [Video: Closing Ciao! Optical](#)



### Confirm Insurance & Authorization

Pull via Courier Website or Trizetto 24-48 Hours Prior, access from Ciao! Toolkit.

▶ [Video: Link Insurance](#)



### Patient Arrives

Select Arrived in Eclips Scheduler (TAB) and scan insurance card on to desktop and upload to Eclips Patient Profile.



### Patient Encounter

Tech checks in patient in Eclips EHR, completes PMI and testing prior to patient exam with the Doctor. Doctor will complete patient exam, codes, and Rx in EHR. Print all final prescriptions.

▶ [Video: Pretesting within Eclips](#)

▶ [Video: Pull Previous Exam Data](#)

▶ [Video: Coding & Workflow](#)



### Enters Insurance & Print Glance Sheet

Update within Eclips Patient Profile (may need to reference prior EHR for patient information and Rx) and print next day Glance Sheets.



### Patient Transition & Check Out

Doctor transitions patient to a team member providing the printed prescriptions. Team Member will invoice in Eclips and check out in TAB.

▶ [Video: Invoice in Eclips](#)

▶ [Video: Check Out in TAB](#)



### Tender Patient Out For Doctor Services

In Ciao! Optical, team member pulls over patient (transitions) in Apps tab in Ciao! then completes the sale.

▶ [Video: Rx To Ciao!](#)

# TeamVision

## CUSTOMER JOURNEY



After  
the Sale



▶ Video: Ciao! Optical Exchange

▶ Video: Ciao! Optical Return

▶ Video: Ciao! Optical Add/Remove EPP



### Monitor Orders

For optical orders, service promise times and status will update in Order Tracker. Document patient communication and email RxO to escalate issues. You will see special order frames or contacts in Product To Come but will monitor CL tracking in the vendor portal.

▶ Video: Order Tracker



### Completes Order in LPA

Complete the final inspection process and log in LPA. If the order fails inspection reject and reorder in LPA. LPA will auto notify patients with email or text as contact preference for optical orders.

▶ Video: Eyewear Inspection

▶ Video: Failed Inspection



### Patient Notification & Dispense

When communication method is not text or email, you MUST call the patient and note on the notification log in Order Tracker. After the patient picks up before close of business, dispense all orders to automatically mark pick-up date in Ciao! Optical Order History.

▶ Video: Dispensing Orders



### Ship Frames To Lab

If you are required to ship the frame to the lab, locate lab address in Order Tracker and use UPS to ship out the order. Follow the Frame To Come (FTC) shipping guidelines without deviation.



### Tender Patient Out For Materials

Complete orders for patients or walk in customers in Ciao! Optical. Utilize Ciao! Toolkit to pull insurance (or courier site).

▶ Video: Medical Insurance

▶ Video: Routine Insurance



### Enter Contact Lens Orders

In Ciao! Optical, use the final Rx or guidelines for specialty lenses. Disposable lenses come direct from the vendor (free shipping).

▶ Video: Specialty Contact Lenses



### Enter Optical Orders

In Ciao! Optical, add insurance or promotions, and tender. For credit cards, take payment in credit card terminal (ensure total, tender type, & amount match).

▶ Video: Deals & Discounts