FILL THE BOOKS

Operational Guide

TeamVision

Eye care, together.

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TeamVision
Eye care, together.

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FILL THE BOOKS OVERVIEW

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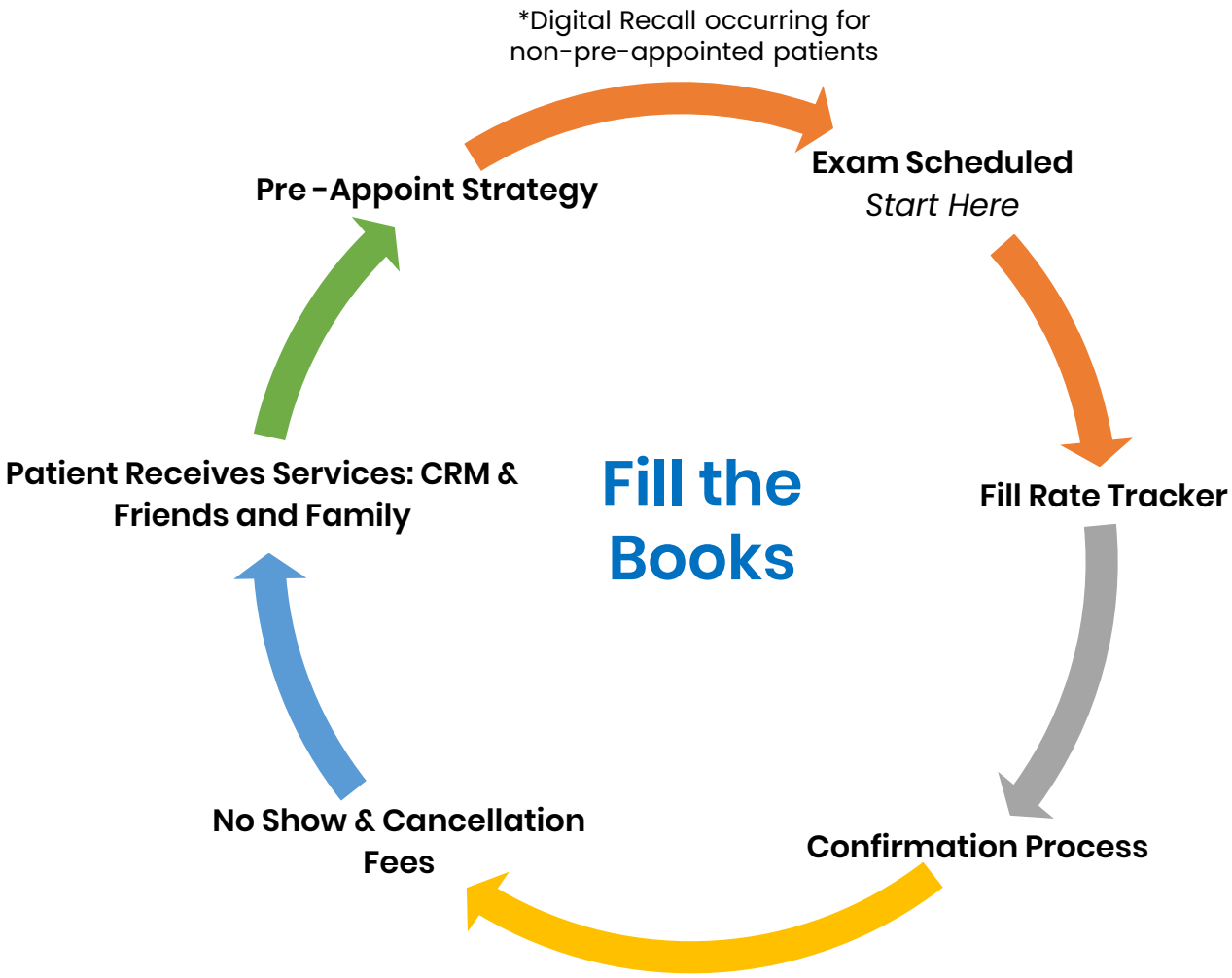
Eye exams are the anchor of a successful optometry practice—clinically, financially, and operationally. They're not just about checking vision - they're the starting point for comprehension eyecare and providing complete vision solutions which lead to long-term business growth.

Exams are the key ingredient in **Prepare,** our first pilar in **Consultative Selling Patient Journey**.

Each location should establish clear processes for:

- Scheduling and Pre-appointing patients for the following year
- Adding Friends and Family members
- Confirming upcoming exams
- Managing No-shows

Use this guide as a starting point to help build your processes (will vary by practice group). Partner with a peer or your Field Leader if you have questions.



Always confirm **patient demographics** at **communication preferences** in the E.H.R and Ciao! Optical!

DIGITAL RECALL COMMUNICATION

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Groundwork **A simple reminder drives action—more calls, more appointments!!**

To help fill your schedule, digital communication is **automatically** sent to patients who **do not** currently have a **scheduled appointment**. This includes patients who were not pre-appointed by the practice or patients that self canceled their exam. These subtle reminders help keep your practice top of mind and encourage patients to schedule their annual eye exam.

- Make sure to get consent and mark "YES" for email/text reminders in the E.H.R and Ciao! Optical to keep your schedule full!
- Reach out to your Field Leader or Caleb Clark (CClark3@luxotticaretail.com) if you have questions.

Recall Communication- These are patients that DO NOT have a booked appointment.								
4PC SMS Recall	**Message:** [Patient name], it's time for your next [recall type] with [doctor name]. To schedule, please call [office number] or click [mobile web scheduler link]							
	Timing of when SMS Recall Communication (months since last exam):							
	13	16	19	22	25	28	31	34

Weave SMS Recall Varies by location	**Message:** Two examples below: 1. **T035:** Hello [First Name] , this is Advanced Family Eye Care - Denver location. Our records show you are [Days Overdue] for your annual eye examination. Please reply to this text or call our office at [Practice Phone] to make an appointment. You can also book online at www.seeadvanced.com We look forward to seeing you soon. Thank you! 2. **T021-T025**: Hello [First Name] , this is [Practice Name]. Our records show you are due for an appointment. Please reply to this message or call our office at [Practice Phone] to make an appointment. Thank you!							
	Timing of when SMS Recall Communication sent varies by location. Two examples below (months since last exam):							
	11	12	13	15	17	22	23	24
	11	13	15					

DIGITAL RECALL COMMUNICATION

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Via email, ECLiPS will communicate two different types of messages to your patients:

1. Importance Of Annual Eye Exam
2. Eye Exam Reminders

Remember- these patients are currently not scheduled.

ECLiPS/TAB
Email Only

Importance of Annual Eye Exam:

Timing of when SMS Recall Communication (months since last exam):

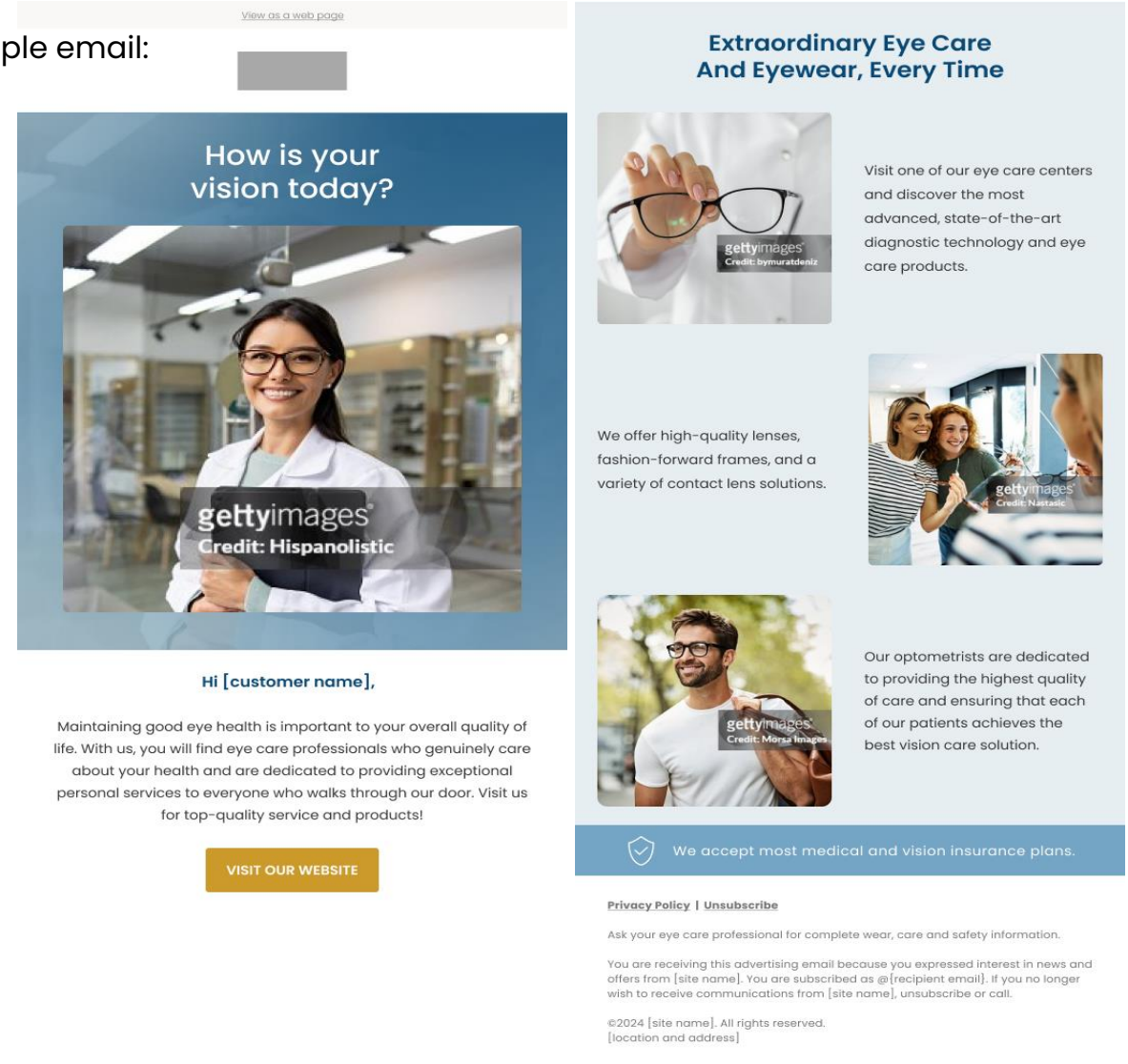
6							

Eye Exam Reminders:

Timing of when SMS Recall Communication (months since last exam):

12	14	16	18	20	22	24	26	28
30	32	34	36					

Example email:



FILL RATE TOOL OVERVIEW

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Step 1

Have a clear view of how many exams are scheduled vs. capacity by using your Fill Rate Estimate Tool!

The Fill Rate Estimate tool is designed to help us capture a rolling 6-week forecast of booked exams. By utilizing this data, we can quickly identify opportunities and take proactive action to enhance our operations and improve our overall performance when filling our appointment books.

Goal:

The goal of this tool is to increase exam fill rates by enabling you to make informed decisions and respond effectively to OD PTO/Availability, Patient Recall, along with other business needs.

Owners:

Practice Managers, Field Leaders, and Managing Doctors will collectively work together to manage this tool.

Opportunities to be reviewed and considered:

OD PTO, OD Availability, Confirmation of Booked Appointments, Pre-Appointing, Recall, Marketing, Staffing, Schedule Efficiencies.

The Process :

Click on the live link to capture this data for your practice: **Practice Exam & Fill Rate Estimate Tool 2025**

- Practice Managers will capture and maintain a rolling 6-week BOOKED EXAM forecast
- Practice Managers will update the rolling 6-week BOOKED EXAMS forecast weekly on Thursdays
- Field Leaders and Managing Doctors will actively spot-check locations and update the live tool
- The Field Leader Team will review the rolling 6-week BOOKED EXAM forecast weekly on Wednesdays to uncover opportunities and take action!

Share your results with your lead O.D and celebrate wins along the way!

HOW TO USE THE FILL RATE TRACKER

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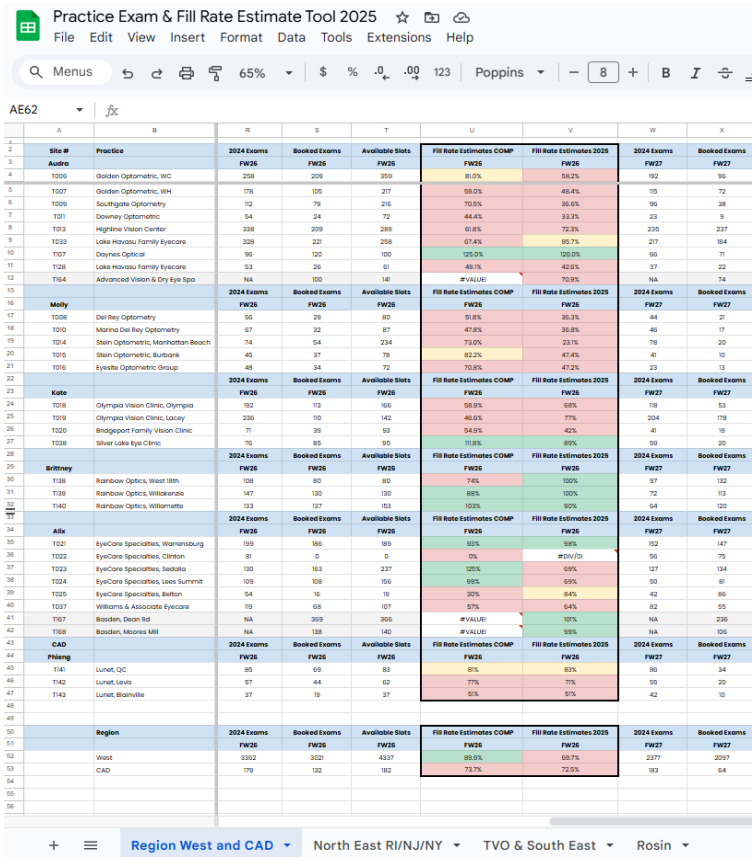

Color Codes:

Green	86% or Hiigher
Yellow	80%-85.99%
Red	79.99% of Below

Column Key:

1. **2024 Exams =** COMP data from1LRA – provided by finance
2. **Booked Exams =** The total amount of Booked Exams that are currently booked for the week
3. **Available Slots =** The total amount of Available Slots for that given week ***Available slots should be the same each week unless the ODs rotate hours, are on PTO, or the practice is closed on a Holiday*
4. **Fill Rate Estimates COMP** = YOY Fill Rate %
5. **Fill Rate Estimates 2025** = Current WTD Fill Rate %

Definition of Exams:

- 92XXX
- 99XXX
- SXXX
- OD Services
- VT

For Example, any service listed in the Eye Exam drop-down, excluding the add-on packages, is considered an exam.

CONFIRMATION PROCESS OVERVIEW

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Step 2

A strong no-show and cancellation policy starts with clear confirmations. In office and digital communication is key!

Communication to the patient is key to ensure our patient are well informed and avoid a negative patient experience. **When confirming, add the messaging to inform the patient of the potential No Show Fees.**

Confirmation Objectives:

1. Clear communication with patients.
2. Confirm the appointment (Fill the Books).
3. Remove unconfirmed pre-appoints and attempt to re-fill the slot.

1 Month Prior
*may vary slightly by practice group
	• **Digital communication** sent alternating between email/text by communication platform.
	  • See following pages for additional details by communication platform.
	• **PCC or Call Center** calls to confirm the appointment.
	  • If patient confirms, mark as **Confirmed** in E.H.R.

2 Weeks Prior	• **Digital communication** sent alternating between email/text by communication platform. • **PCC or Call Center** will call to confirm the appointment. • If patient confirms, mark as **Confirmed** in E.H.R.
PRE-APPOINT ONLY **2 Weeks Prior** Keep non pre-appoint patients on the books!	• Remove unconfirmed **Pre-Appoint** patients. • Select ECLiPS locations will move appointments to the side of Appt. Book vs. removal. • **Fill in newly opened slots** by using waitlists, call upcoming scheduled patients, and Friends & Family.
1 Week Prior *may vary slightly by practice group	• **Digital communication** sent alternating between email/text by communication platform. • **PCC or Call Center** will call to confirm the appointment. • If patient confirms, mark as **Confirmed** in E.H.R.
24 hours **Site to Action**	**All patients listed on the books (confirmed + unconfirmed) require a reminder call, text, and or email.** • Remind patient of the no show fees if unconfirmed. • Optional 2nd call same day of appointment.

Click HERE for Pre-Appoint communication and details.

Sounds Like: Hi Ms. Smith. This is [Name] calling from [Practice Name]. I'm calling to confirm your appointment scheduled on Tuesday, March 1st at 10am. Does that day and time still work for you? Great, please bring all of your current eyeglasses and sunglasses and copies of your insurance cards. Our office has implemented a no-show cancelation fee of $50 so if something comes up, please reschedule your appointment 24 hours in advance.

ECLiPS CONFIRMATION REMINDERS

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ECLiPS(TAB) will assist in patient communication along with in office efforts to confirm patients and help fill your books. Below is a communication overview.

	6 W	4 W	21 Days	2 W	10 D	1 W	24 HRS	2-4 HRs
Digital Communication Auto-Triggered with correct PMOC			Email		Email	Email		SMS
Site Action PCC or Call Center	Mail*	Call		Call SITE ACTION		Call	Call	Optional Call

*Current locations using postcards can continue to do so, however digital communication is preferred.

Move/Remove unconfirmed pre-appoints and action to fill books with Waitlists, Friends & Family.

Digital Communication Examples	
ECLiPS Email Reminder	**Message:** Dear [PATIENT NAME] Thank you for trusting [LOCATION NAME] with your eye care needs. We are looking forward to seeing you for your appointment. If you are no longer able to make this scheduled time, please click to reschedule below.

Rosin Locations- Click HERE for your pre-appoint strategy.

4PC CONFIRMATION REMINDERS

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4PC will assist in patient communication along with in office efforts to confirm patients and help fill your books. Below is a communication overview.

	6 W	4 W	2 W	2 W	5 D	2 D	24 HRS	2-4 HRs
Digital Communication Auto-Triggered with correct PMOC					Email	Auto Call		SMS
Site Action PCC or Call Center	Mail*	Call	Call	SITE ACTION	1 W Call		Call	Optional Call

*Current locations using postcards can continue to do so, however digital communication is preferred.

Remove unconfirmed pre-appoints and action to fill books with Waitlists, Friends & Family.

Digital Communication Examples	
4PC Email Reminder	**Message:** This is a friendly reminder of your upcoming appointment at [Date] [Time]. [CONFIRM] [RESCHEDULE] [CANCEL]
4PC Reminder Phone Call	**Message:** This is Amy, calling from [Greeting Txt], to remind [FirstName], that you have an appointment [Appt Date]. If you will be able to make this appointment with [Acct Txt], please press 5. If you cannot make this appointment, please press 3.
4PC Reminder SMS	**Message:** Hi [FirstName], [Doctor Name] looks forward to seeing you [Appt Date Time]. Please do not respond to this message. Thank you!

WEAVE CONFIRMATION REMINDERS

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Weave will assist in patient communication along with in office efforts to confirm patients and help fill your books. Note this **varies by location**. Reach out to your Field Leader or Caleb Clark (CClark3@luxotticaretail.com) if you have questions. Below is a communication overview.

Example # 1: T035	6 W	4 W	23 D	2 W	7 D	3 D	24 HRS	2-4 HRs
Digital Communication Auto-Triggered with correct PMOC		Email	Email		Email	Email	Email	
Site Action PCC or Call Center	Mail*	Call		Call + SITE ACTION	Call		Call	Optional Call

Example # 2: True Eye Group	6 W	4 W	2 W	2 W	7 D	3 D	24 HRS	2-4 HRs
Digital Communication Auto-Triggered with correct PMOC						Email		Email
Site Action PCC or Call Center	Mail*	Call	Call	SITE ACTION	Call		Call	Optional Call

*Current locations using postcards can continue to do so, however digital communication is preferred.

Remove unconfirmed pre-appoints and action to fill books with Waitlists, Friends & Family.

Digital Communication Examples	
T035 Email Reminder	**Message:** Hello [First Name], this is Advanced Family Eye Care - Denver location. We wanted to remind you of your upcoming eye appointment on [Month] [Day of Month] at [Time]. Please take a moment to confirm this appointment in order for us to hold your examination time. It is our mission to prepare well in advance of your appointment for your convenience and to reduce time in our office. Please text images of your updated medical and vision insurance cards (front and back) to our HIPAA compliant portal at 704-822-9920. We are working to be efficient and provide a touchless process. Thank you!
True Eye Group Reminder Phone Call	**Message:** Hello [First Name], this is [Practice Name]. Just a reminder of your appointment on [Month] [Day of Month] at [Time]. Please text YES to confirm, see you then! Don't forget to bring any current Rx glasses, contact lenses, and a list of any eye drops or medications you currently take.

MAIL REMINDERS

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If your location is currently using postcard reminders, you may continue to do so, however **new sites should NOT begin**. Current sites may receive additional information in upcoming weeks.

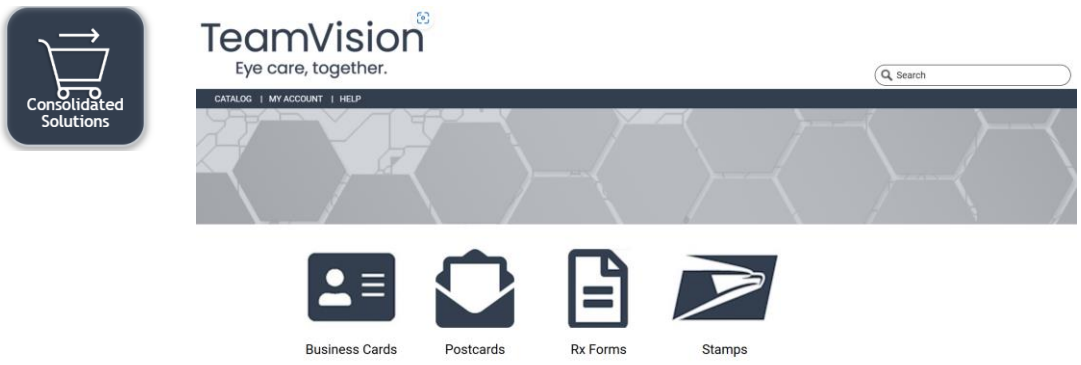
Although some patients prefer digital communication, for many patients a mail or physical appointment reminder can help confirm or remind the patient of their scheduled exam.

Always **confirm & update patient communication preferences** at check in/out in the E.H.R and Ciao! Optical. Encourage digital communication when possible.

Mail Confirmation Process	
Six weeks before confirmation date*	• Practice or Assistant Practice Manager to send list to printer or create printed labels • A6 Avery works the best for the layout
Four weeks before confirmation date*	• Practice or Assistant Practice Manager will mail out post card, this way it will be delivered at least 2 weeks prior to confirmation date on post card. • If you'd like to continue handwriting, please reach out to Field Leader.
*Confirmation date is 2 week prior to scheduled exam	

Consolidated Solutions:

- If you are not participating in the printing pilot, you can order postcards and postcard stamps from **Consolidated Solutions** (Toolkit App).
- Pick the correct postcard and customize with your office details.
- You will be able to save, once customized, to make future ordering needs easier.
- Click HERE to access the Supplies & Expenses Guide for how to login details.



NO SHOW PROCESS

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Step 2

Every missed appointment is a missed opportunity for care—follow up to keep patients on track and show you care.

Following up with empathy when a patient misses their appointment is essential. It shows we value their health and time, builds trust, and strengthens the patient-provider relationship. Reaching out to check in and reschedule communicates that we care.

Every location should have a clear strategy in place for following up with patients who don't show up for their appointment (may vary by practice group).

Always notify patient of No-Show Cancelation Fees!

Best Practices: Wait 15 mins past appointment- giving the patient time to arrive.	
Once 15 minutes have passed:	1. Call patient to reschedule. 2. When leaving voicemail, mark as a no show. • This will help accurate reporting so we can follow up with patients

It might **Sound Like**:

- Hi [Patient Name], this is [Your Name] calling from [Practice Name]. We noticed you weren't able to make it to your appointment today, and we just wanted to check in and make sure everything's okay. We know things come up, and we'd be happy to help you reschedule at a time that works better for you. Your eye health is important, and we want to make sure you stay on track with your care. Give us a call at [Phone Number] when you're ready, or feel free to book online. As a reminder, we do have a $50 cancelation fee since it was within 24 hours. Please call us to reschedule. We hope to see you soon!
- Hi [Patient Name], We missed you at your scheduled eye exam today and hope everything is alright. Regular eye exams are an important part of maintaining your vision and overall health. Please contact us at [Phone Number] or [Online Scheduling Link] to reschedule at your earliest convenience. Our team is here to help find a time that works best for you. Reminder, we do have a $50 cancellation fee if we can't reschedule you. We look forward to seeing you soon.

PROCESSING FEES

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Step 3

Pre-booking with reminders helps reduce no-shows and shows patients you value their time and care about their eye health!

Being available for our patients while ensuring our appointment books are full is fundamental to our business. No Shows or Late Cancellations prevent us from being able to maximize our productivity.

To reduce No Shows and Late Cancellations, we are implementing a $50 No Show Fee. This fee is to serve as a deterrent to prevent No Shows and Late Cancellations and motivate our patients to keep their commitment to their scheduled date and time. See below for details on patient communication and billing process through your EHR and Ciao! Optical.

1. **Patient Notifications -** Communication to the patient is key to ensure our patient are well informed and avoid a negative patient experience. **Add the messaging to inform the patient of the potential fee when the exam is booked and during the below times.**

Messaging to be added to these moments to ensure patient is well informed:
Appointments cancelled less than 24 hours in advance and no-show appointments will be subject to a $50 fee; this fee will not be covered by your insurance company.

2 Week Email Reminder

- Site or Call Center sends the standard reminder

5 Day Phone Call (not conf.)

- Site or Call Center will confirm or reschedule live patients
- Site or Call Center will leave a message that they must confirm their apt, or it will be cancelled

3 Day Phone Call (not conf.)

- Clinic will call to confirm remaining appointments.
- Clinic will cancel appointments if not confirmed same day

1 Day Phone Call or Email

- Site or Call Center sends the standard reminder

Call Scripts

5 Day Phone Call SITE OR CALL CENTER	"Hi, this is (name) calling from (Practice Name). We were calling to confirm an appointment scheduled on (Date & Time) with (Dr. Name/Location). If you could please give us a call within the next two business days to confirm the appointment at XXX-XXX-XXXX to avoid being charged a late cancellation or no show of $50.00, not covered by your insurance company. If we do not receive any confirmation by then the appointment can be cancelled. Thank you have a great day."
3 Day Phone Call SITE OR CLINIC STAFF	"Hi, this is (name) calling from (Practice Name). We are following up on our message we left on (2 Day Prior Date) to confirm an appointment scheduled on (Date & Time) with (Dr. Name/Location). Please give us a call today to confirm the appointment at XXX-XXX-XXXX or your appointment will be canceled. Thank you have a great day."
1 Day Phone Call SITE OR CALL CENTER	"Hi, this is (name) calling from (Practice Name). We were calling to give you a Friendly Reminder of your appointment scheduled on(Date & Time) with (Dr. Name/Location. Cancellation less than 24 hours or no show will be subject to a $50 fee not covered by your insurance company. Thank you and we look forward to seeing you soon."

Note: messaging to be added to Email and Text Notifications.

PROCESSING FEES

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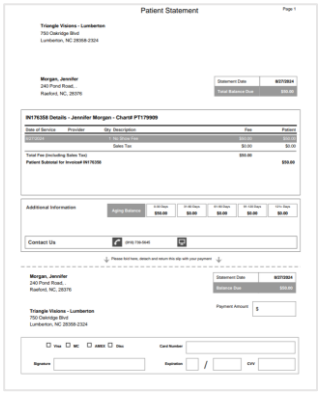
2 **In-Practice Signing –** Visibility to the policy will be important to post within the clinic and on the practice website. Signs will arrive in your clinic and should be displayed at check in/out counter.

Website Disclaimer - No Show and Late Cancellation messaging will be added to the "For Your Visit" section and "Location" pages on your practice website.

Signage:

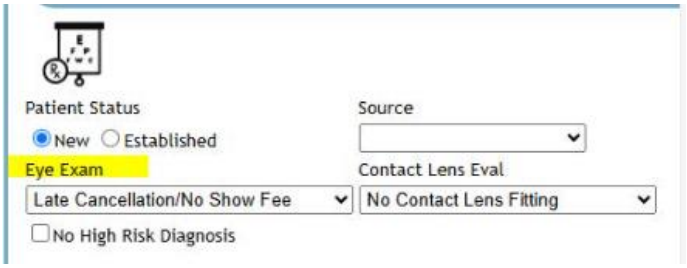
3 **Assessing and Collecting No Show Fee –** When a patient doesn't show or cancels less than 24 hours (without rescheduling), a fee will be assessed.

- TAKE ACTION:
  1. Clinic Staff will add fee via invoice on patient record in E.H.R.
  2. Print patient statement and mail to patient same day.
  3. Void or remove the invoice so that it does not impact patient aging.
  4. Create an alert/notification in E.H.R. that patient owes no show fee.



Note- Not applicable for Medicaid patients

- Patient receives invoice.
  - **DON'T PAY:** Additional invoices will be sent on the 1st of the month with the patient statement process/flow. Will follow same process of 4-statement attempt for outstanding balances. Patient cannot be rescheduled until 'no show' fee is paid.
  - **PAY:** Patient fills out remittance and sends to clinic. Clinic staff will process payment on date received in Ciao! Optical (credit card, cash, check). Sales will post on this processing date. Payment posted in ECLiPS (net balance $0).



WAIVING FEES

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Prior to charging our patients a no show fee, we owe it to have a clear confirmation process in place. This is a combination of in office and digital communication. During this process, we must clearly communicate the potential $50 fee. Excludes all Medicaid patients.

Waiving Fees– your office should have a standardize practice for all patients, partner with your site Leaders & OD's to align on your process and when exceptions should be made. We are actively communicating this so patients should be aware of this policy.

Waive No Show Fees -Yes or No	Scenario
YES	Patient forgot about appointment
YES	Something came up at work
NO	Family member had a medical emergency
NO	Within 2 weeks of policy adoption- Team member forgot to notify patient of the new policy

Please note: These are general guidelines, and each patient's situation is unique.

- Our goal is not to discourage patients from visiting our practice.
- To avoid confusion or frustration, it's essential that we have a strong confirmation process in place and clearly communicate any potential fees in advance.
- General rule of thumb is if it's outside of the patient control- don't charge it. If it is something they control, charge the fee.
- If you're ever unsure how to proceed, partner with your Practice Manager or Field Leader for guidance.

MARK NO SHOWS

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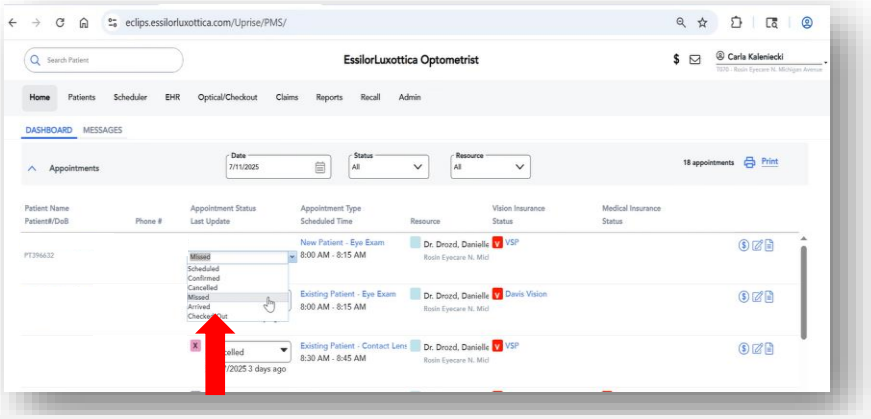
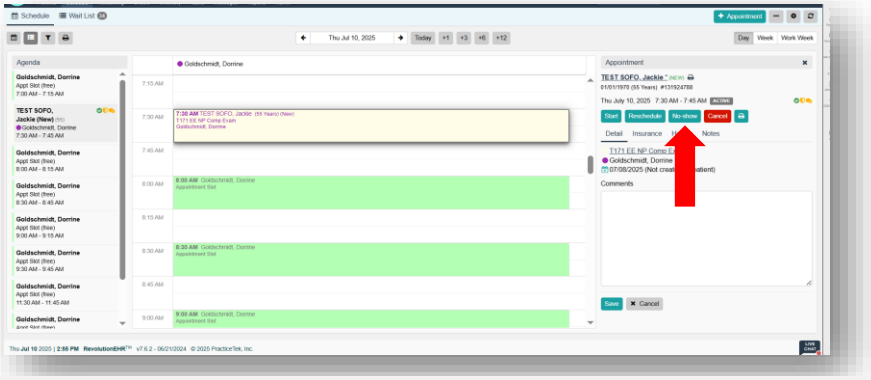
ECLiPS:

From the home screen (or from the Scheduler) locate the patient and mark as **Missed**.



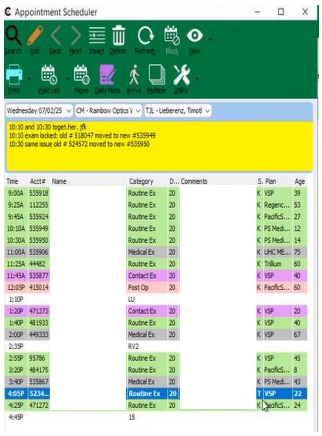
RevolutionEHR:

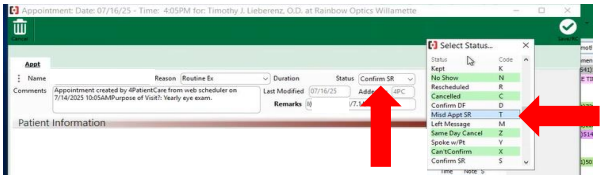
- From the scheduler, select the patient and click **No-Show**
  - For accurate reporting- do not cancel the appointment unless requested by the patient
  - This must be done on the day of the exam



Compulink: may vary by PC Group

- From the Schedule, double click on the **Patient**
- Select **Status Bar** on top right
- Mark as **Missed/No Show**





MARK NO SHOWS

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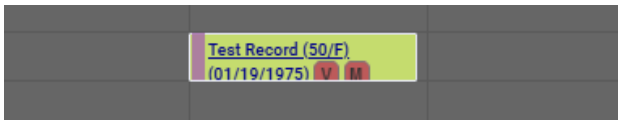
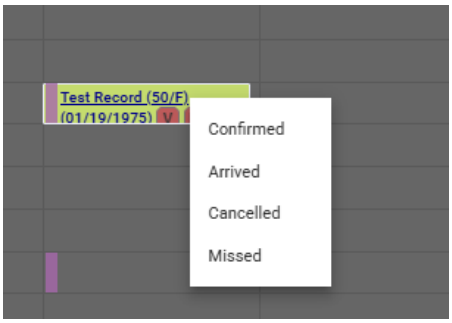
UPRISE:

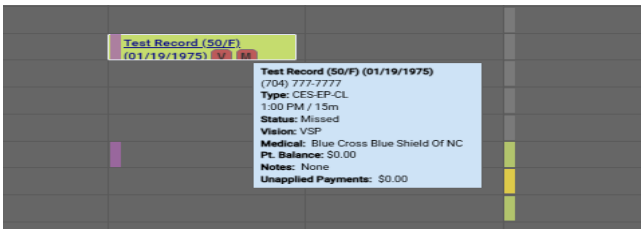
1. • Ensure in ALL areas that the patient has not been checked in by another individual. (Ie: if you have more than one check in window)



2. • Once determined that the patient has not checked in with another individual, float your mouse over the name and RIGHT-CLICK. Select missed)



3. • Float your mouse over the name to ensure the appointment is showing as missed.



Note- for Medical Exams, select locations will have additional steps. Reach out to your Field leader if you need assistance.

- Go into the patient chart to ensure the patient has not re-scheduled this appointment.
- Create an appointment for the clinical team to call the patient.
- Mark the appointment as arrived.
- Select Phone: Medical Concern as the appointment type.
- Save the appointment.
- Go back to patient main screen and select EHR on the left-hand side of the screen.
- Click + New Exam.
- Select Telephone/Email/Patient Request.
- Scroll to the bottom of the EHR record and type your note followed by your initials.
- Scroll up to the top of the EHR and click DONE.
- Go back to patient record and make a note regarding adding the EHR, followed by your initials.

NO SHOW REPORTING

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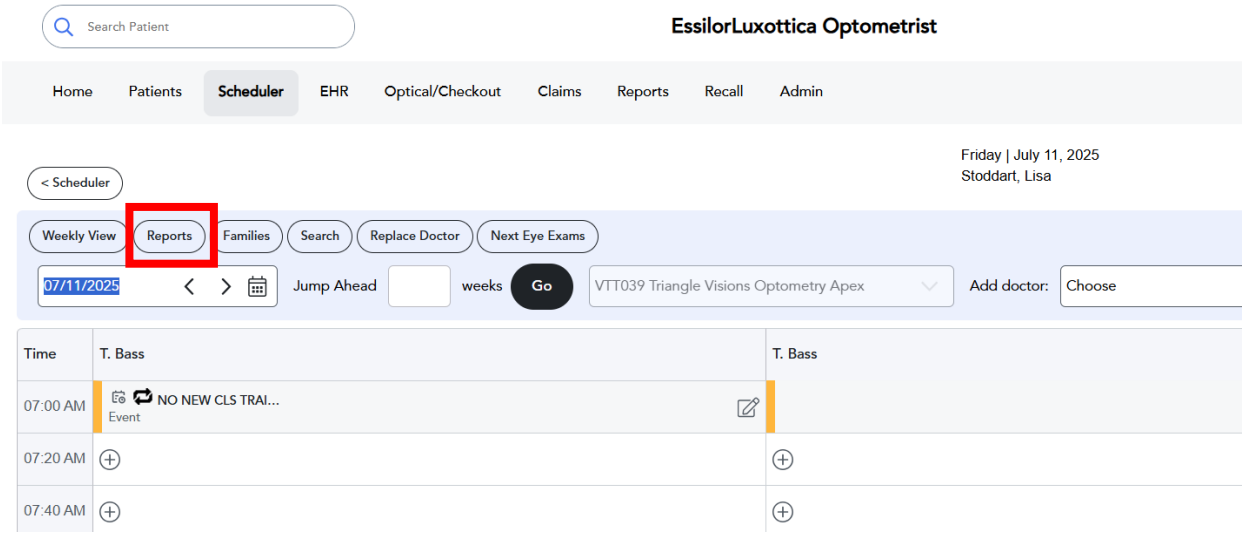
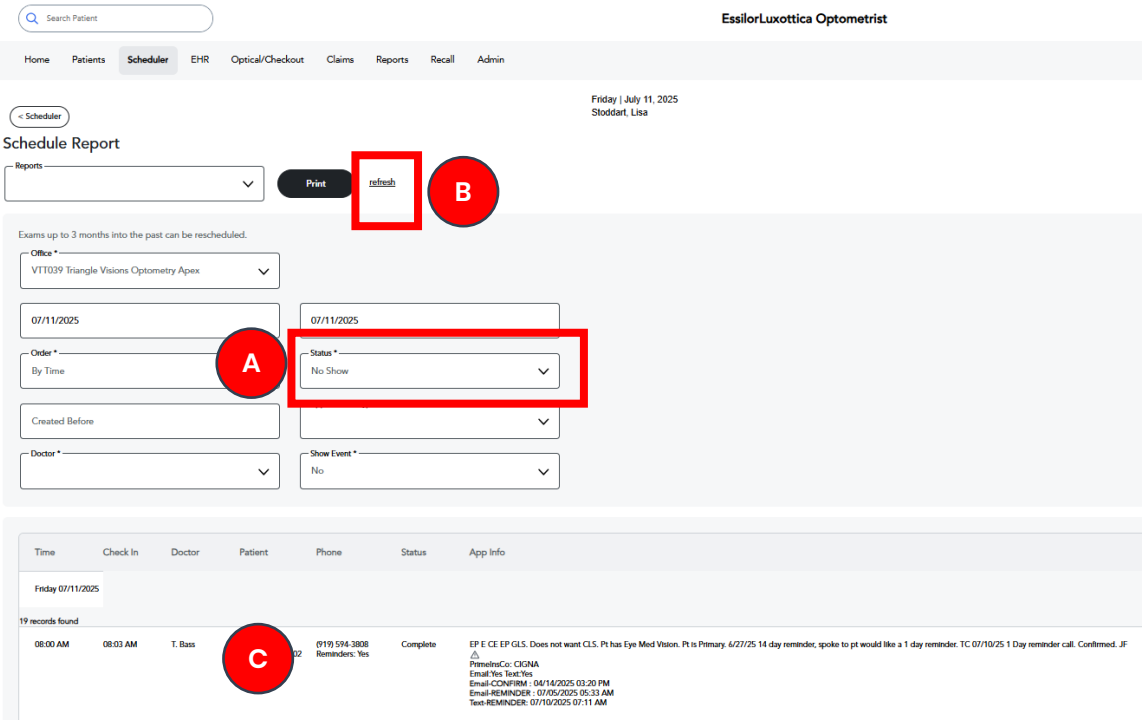
ECLiPS:

You can pull a report of patient's that have been marked as **MISSED** within ECLiPS and TAB. To access these reports, you must be in the **SCHEDULER** within ECLiPS.

1. From the Schedule, select **Reports**



2. On the **Status** pulldown bar, select No-Show (confirmed, cancelled, etc.)
3. Click Refresh to generate the list of patients below



NO SHOW REPORTING

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RevolutionEHR:

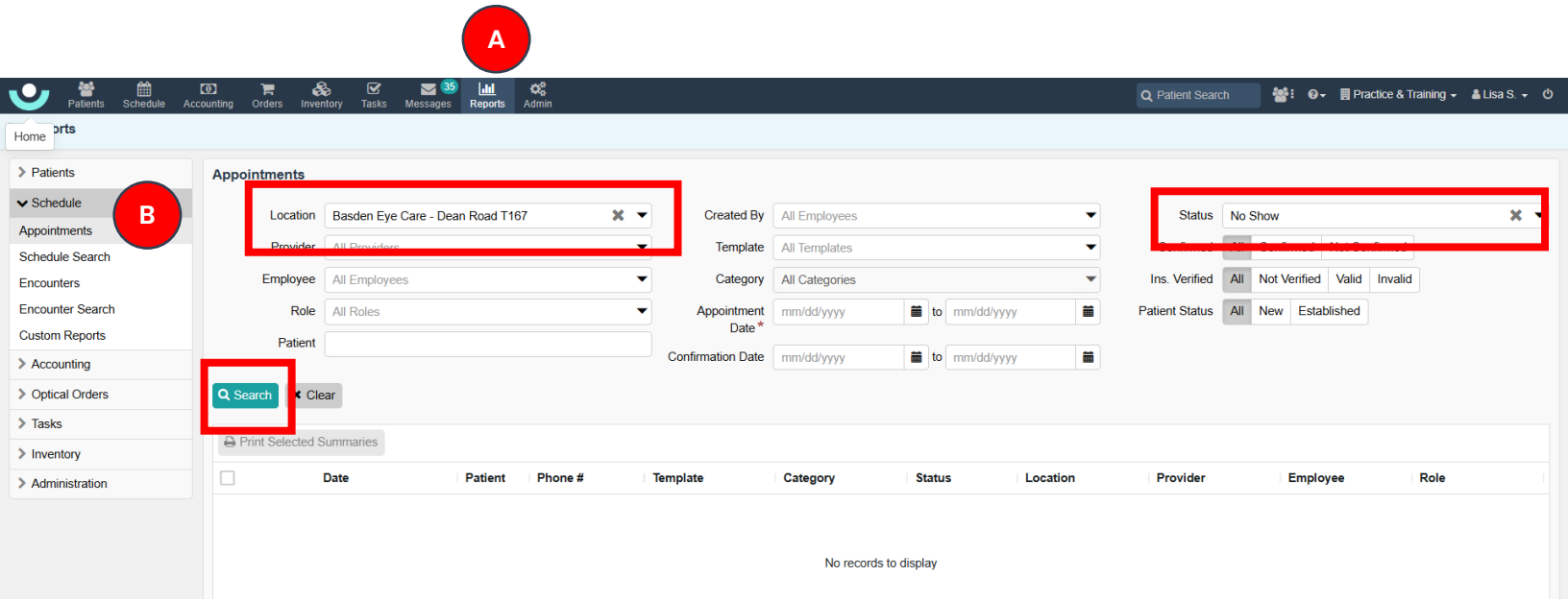
You can pull a report of patient's that have been marked as **NO SHOW** within RevolutionEHR.

To access these reports, you must use the **Reports** pod from the home screen. Note-not all team members will have access to pull reporting.

To access the reports:

1. Click Reports
2. Open up **Schedule** options and select **Appointments**
3. Select your **Location**
4. Change **Status** to **No-Show**
5. Click **Search-** patients will be listed below

RevolutionEHR:
New Reporting coming soon!



NO SHOW REPORTING

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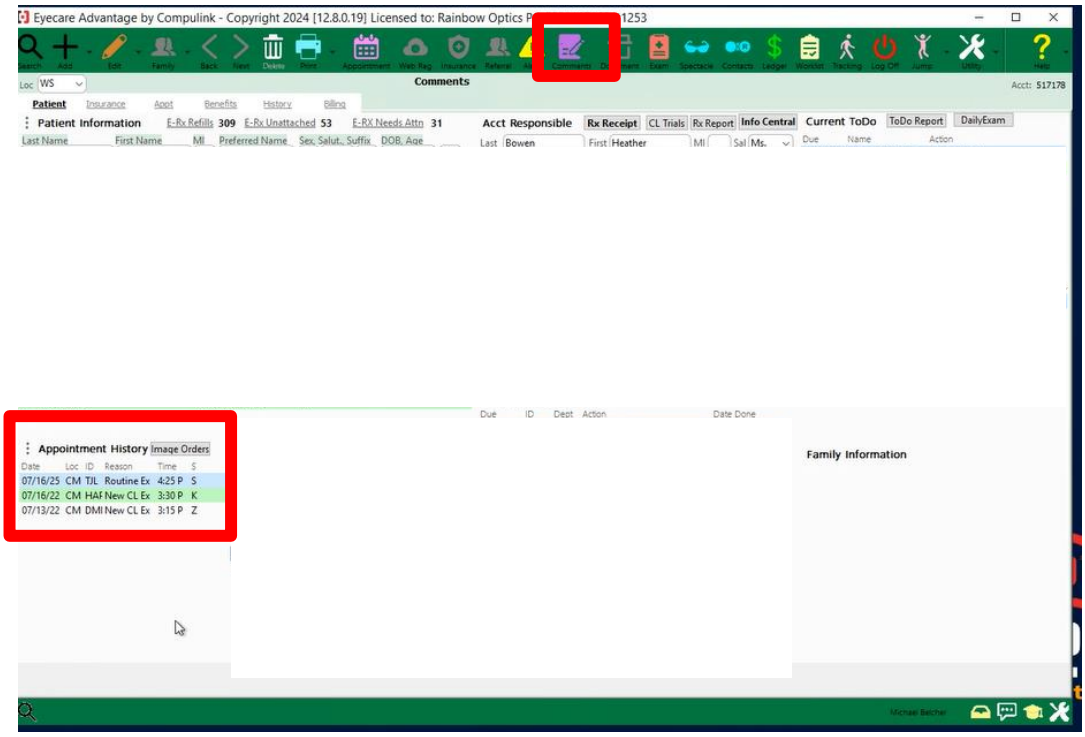
COMPULINK:

At this time you can not generate a No Show Report from Compulink but you can audit your schedule and follow up with patients that did not show up for their appointment.

1. Go day by day and identify those who missed their appointment (term'd patients)
2. Click on that patient and open up their profile
3. Follow up with the patient and click Comments to indicate you reached out
4. Use the appointment history to look for trends

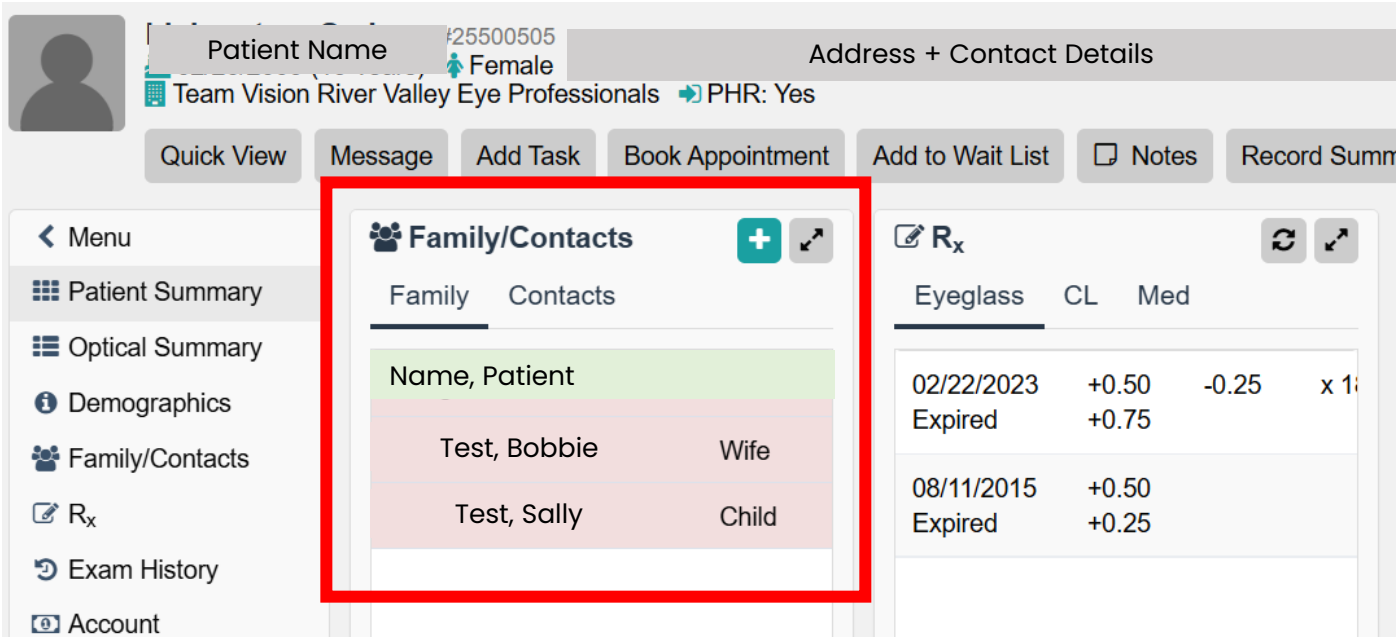


Uprise locations partner with your Field Leader!

Step 4

Talk to patients about Friends & Family and Referral programs while they're in the office—these can help fill your books!

Topic	Actions	What Does It Sound Like
Others On Insurance	**Check In / PCC:** • When scheduling appointment, ask if there are additional family members they need to schedule. • When pulling insurance, document other eligible family members. • At confirmation call, offer to book family members listed on insurance.	**OD:** Mrs. Smith, is everyone in the family up to date on their annual exams, including Bob and Sally? or anyone else in the family experiencing the same vision concerns as yourself? **Team Member:** Mrs. Smith, is see Julie and Michael are also eligible for their exams. Did the doctor mention the importance of annual exams? *If not- educate- if yes- offer to schedule.*
	In the Lane: • OD to ask if everyone in the family is up to date- personalize by name!	
Check Out	**Check Out & Optical Teams:** • Engage all family & friends in the building-offer to schedule exam. • *Note-offering to clean and adjust eyewear/sunglasses is a great way to open up the conversation!* • Ask the patient if they have any other family members not with them today, that they'd like to book.	**Team Member:** Lisa, it was great helping you today. I'd love to be your family optician; Do you need to schedule any other family members while you're here? I noticed Sally was listed on your VSP plan. I know you're waiting for someone to complete their eye exam, but while we are waiting can I offer you a complimentary cleaning and adjustment on your sunglasses? [one adjustment completed] Are you all up to date on your annual exam? If not, I can schedule that for you while we are waiting.
Dispense	**Optical Teams:** • Engage all family & friends in the building-offer to schedule exam. • *Note-offering to clean and adjust eyewear/sunglasses is a great way to open up the conversation!* • Ask the patient if they have any other family members not with them today, that they'd like to book. • Educate on Patient Referral Program and offer to book appointments!	**Team Member:** Lisa, it was great helping you today. Who is going to be the first family member to see you in your new eyewear? Are they also up to date with their annual exam? • No- okay, well we can take care of that. In fact in a week you're going to receive an email to forward out to friends and family. This will give them a great discount when they come in. Let's take care of scheduling that appointment now? • Yes- great! I have a great offer they can take advantage of. In about 1 week….



The Family/Contacts pod provides the ability to color code the individual family members displayed in the pod. **The colors provide the user a quick reference to the family member's last Comprehensive Exam.**

- Comprehensive Exams are setup within the encounter template in Administration. Access Admin > Encounters / Interviews > Encounter Templates > open a template. Within the encounter template configuration, "Is Comprehensive" must be checked.

Instructions- You Must have admin rights to set up in Rev:

1. Access Admin > General > Practice Preferences > Additional Preferences > Patients > Family/Contacts Pod.
2. For "Highlight Last Comprehensive Encounter," click 'Yes.'
3. The multiple fields for Date Range have default values that can be updated.
    - Date range for GREEN highlight: Comprehensive encounters that are from 0 to "___" months.
    - Date range for BLUE highlight: Comprehensive encounters that are from 12 to "___" months.
    - Date range for ORANGE highlight: Comprehensive encounters that are 24 to "___" months.
    - Date range for RED highlight: Comprehensive encounters that are 36 months and greater
4. Click 'Save.'
5. Log out and log in to see the changes associated to the setting.

CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

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Step 4

Talk to patients about Friends & Family and Referral programs while they're in the office—these can help fill your books!

Digital Marketing Campaigns connect patients to your practice and supports an ongoing relationship as their trusted provider. By capturing all patients' emails, you can directly support patient retention through exam growth and foot traffic. These campaigns will positively impact sales growth for your location:

Email addresses should be updated in both the E.H.R system along with Ciao! Optical. Our ability to execute CRM campaigns hinges on our ability to **ask and confirm** email and cell phone numbers (updating PMOC) while the patient is in the office.

Click HERE to be redirected to learn more about Digital Marketing Campaigns in Toolkit.

PRE-APPOINTING FOR THE NEXT YEAR

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Step 5

Patients are more likely to follow through with care—like annual exams and follow-ups—when appointments are set in advance. Annual exams help reduce gaps in care, catch issues early, and support preventative health!

One of the biggest opportunities in our clinics is filling our books. Pre-appointing our current Routine Patients (i.e., patients that receive a refraction) is a great way to have continued patient care, by making sure they are booked every year for their annual eye exams.

Capturing accurate email addresses and phone numbers is key.

Check out teams will pre-appoint EVERY ROUTINE PATIENT for the following year – 1 year and 6 days out (for insurance purposes) and give the patient a reminder card with the date and time.

It might **Sound Like:**

- We are going to schedule you for your annual exam next year. Here is a card with the date, time. If you should need to change this exam, please just give us a call and we will take care of it for you. We will also remind you next year a few weeks before your exam.
- The doctor would like to see you next year to monitor your eye health. I understand you can't predict your schedule one year out, but do you have a particular day of the week that usually works well for you? [Patient Responds] Great- let's schedule you one year and one week out on a [state day of the week the patient stated].
  - Patient Objects: Totally understand! If it's okay with you, we'll go ahead and reserve a spot for you now, and we'll send a reminder closer to the date. That way, you have it on the calendar but can always adjust if needed. It's easy to forget these things!

- Click HERE to be redirected for the confirmation process.
- Click HERE to understand why annual exams are important.
- Click the hyperlink below for Pre-Appoint How-to Guides by E.H.R:
  - RevoultionEHR
  - ECLiPS and TAB
  - Uprise
  - Compulink coming soon!

PRE-APPOINT DIGITAL COMMUNICATION CADANCE

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In addition to in office activities, your patients will receive digital communication and reminders regarding their pre-appointed schedule. **Reminder- all patients should be pre-appointed for their next exam prior to leaving the office.**

Reach out to your Field Leader or Caleb Clark (CClark3@luxotticaretail.com) if you have questions.

Pre-Appoint Digital Communication								
4PC Email Schedule 12 months out	**Message:** This appointment was scheduled at your last exam. Will you be able to keep this appointment? {Date} {Time}. [CONFIRM] [RESCHEDULE] [CANCEL]							
	Timing of when SMS Recall Communication (days out):							
	28							

4PC SMS	**Message:** Hi [FirstName], [Doctor Name] looks forward to seeing you [Appt DateTime]. Text C to confirm or call [Office Number] to reschedule. Thank you!							
	Timing of when SMS Recall Communication (days out):							
	21							

4PC Automated Phone Call	**Message:** This is Amy, calling from [GreetingTxt], for [FirstName], to confirm the appointment scheduled during your last visit for [ApptDate]. Your appointment is important. If you will be able to make this appointment, please press 5. If you cannot make this appointment, please press 3.							
	Timing of when SMS Recall Communication (days out):							
	14							

Click HERE to be redirected to learn more about Digital Marketing Campaigns in Toolkit.

PRE-APPOINT DIGITAL COMMUNICATION CADANCE

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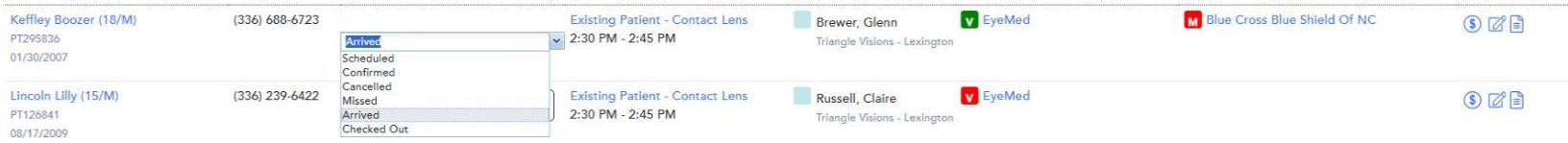
<table>
<tr><td rowspan="4">Weave
Email

Varies by Location</td><td colspan="8">Message: Varies by location. Two Examples below:
1. T035- Hello [First Name], this is Advanced Family Eye Care - Denver location. We wanted to remind you of your upcoming eye appointment on [Month] [Day of Month] at [Time]. Please take a moment to confirm this appointment in order for us to hold your examination time. It is our mission to prepare well in advance of your appointment for your convenience and to reduce time in our office. Please text images of your updated medical and vision insurance cards (front and back) to our HIPAA compliant portal at 704-822-9920. We are working to be efficient and provide a touchless process. Thank you!
2. T167- Hello [First Name], this is [Practice Name]. We can't wait to see you for your appointment on [Month] [Day of Month] at [Time]. Type C to confirm. Thank you so much!</td></tr>
<tr><td colspan="8">Timing of when Email Recall Communication sent varies by location. Two examples below (days out):</td></tr>
<tr><td>T035</td><td>30</td><td>23</td><td>7</td><td>3</td><td>1</td><td>30</td><td>23</td><td>7</td></tr>
<tr><td>T167</td><td>10</td><td>3</td><td>2hrs</td><td></td><td></td><td></td><td></td><td></td></tr>
</table>

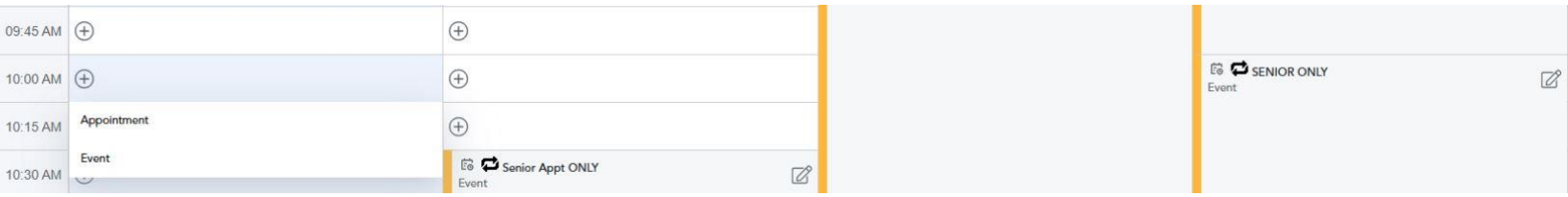
Via email, **ECLiPS** will send digital communication and pre-appoint reminders. This will be sent regardless of if the patient is scheduled in the live appointment book or NEE book.

<table>
<tr><td rowspan="3">ECLiPS/TAB
Email Only</td><td colspan="8">Message: Dear [PATIENT NAME] Thank you for trusting [LOCATION NAME] with your eye care needs. We are looking forward to seeing you for your appointment. If you are no longer able to make this scheduled time, please click to reschedule below.</td></tr>
<tr><td colspan="8">Timing of when SMS Recall Communication (days out):</td></tr>
<tr><td>21</td><td>10</td><td>7</td><td></td><td></td><td></td><td></td><td></td></tr>
</table>

1 First you will **Check Out** the patient.



2
- Next, you will go **One Year** and **Six Days Out** on the calendar.
- Click the **Time** you would like to pre-appoint the patient, just like you do when booking a normal exam.



3
- After you have clicked the appointment slot you would like for their pre-appointment, you will **Search** your patient's information
- Create a **Pending Appointment** and hit **Confirm** on the bottom right-hand corner.

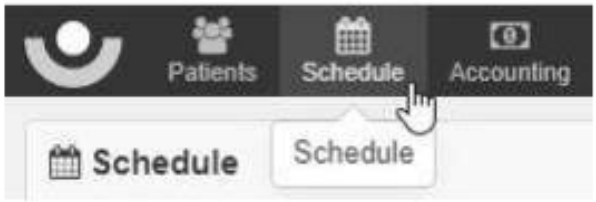
4 Once this has been confirmed you will see a pending appointment (pre-appoint) in the time slot you picked.

Select ECLiPS Locations:

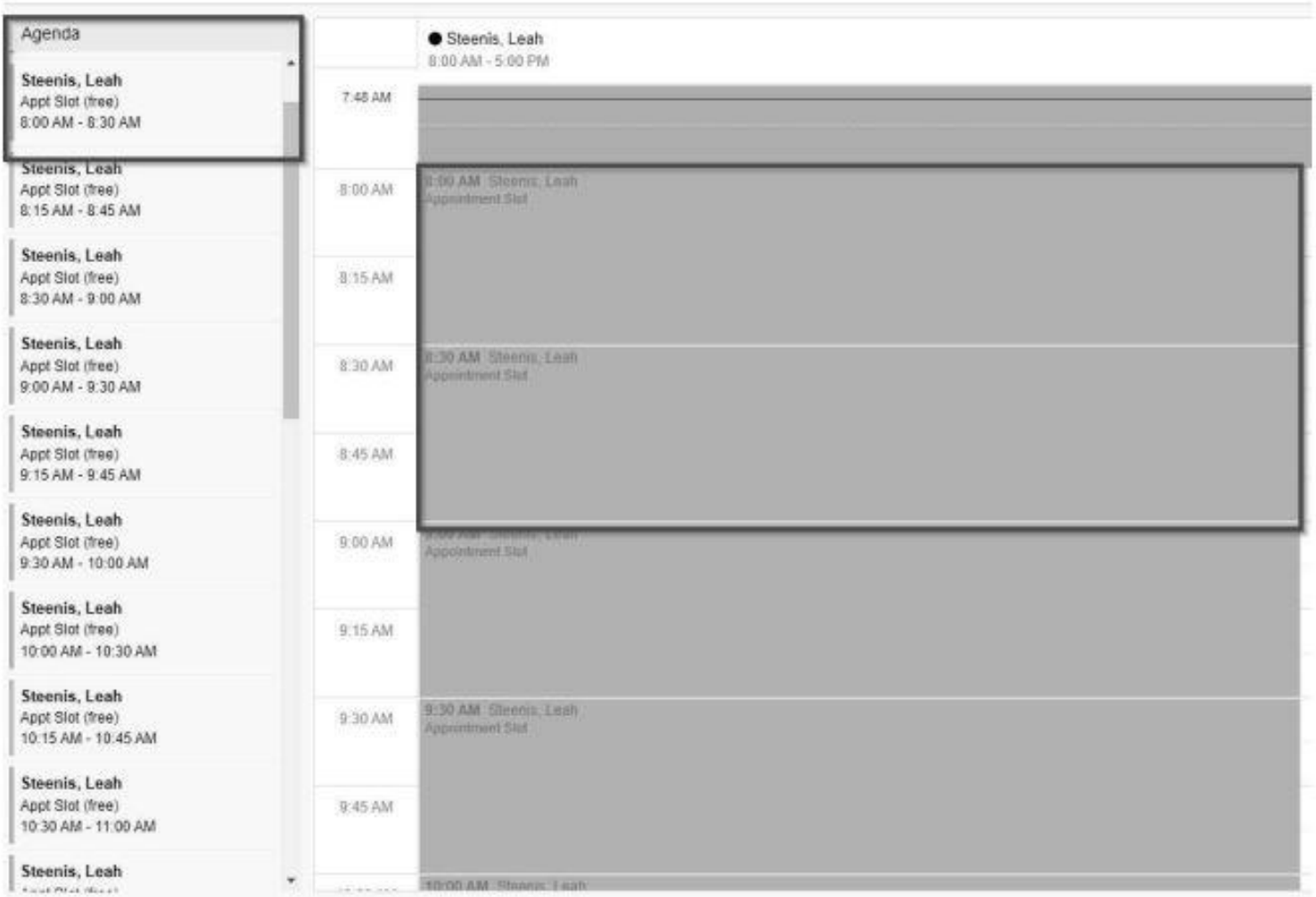
- It is important that this appointment is **Pending** on your calendar. This will help you distinguish if the patient is a pre-appointment or a booked exam.
- If the patient has not confirmed a week prior to their pre-appointment date, you will **Cut** the exam and place in the **Right Column** of your scheduler screen.
- Mirror the appointment type for the following year (unless new presently, make established the following year).
- Remember these are people you have an established relationship with that are in need for their annual eye exam.

Creating an Appointment in an Appointment Slot

1. Select the Schedule module from the System Navigation bar

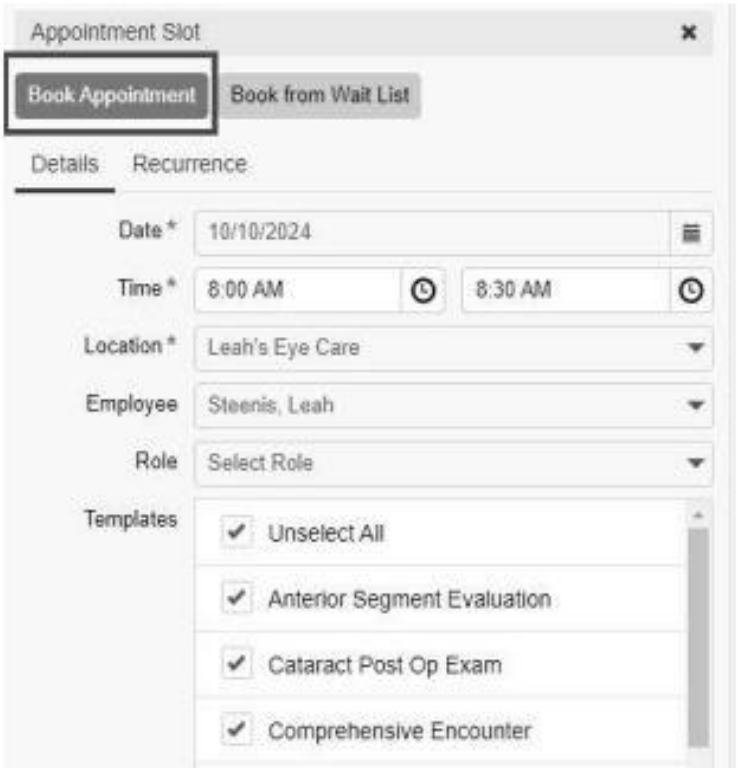


2. Within the Schedule module, there are a few ways to view the booked and open appointment slots. It's completely up to each user on how they choose to view the schedule.

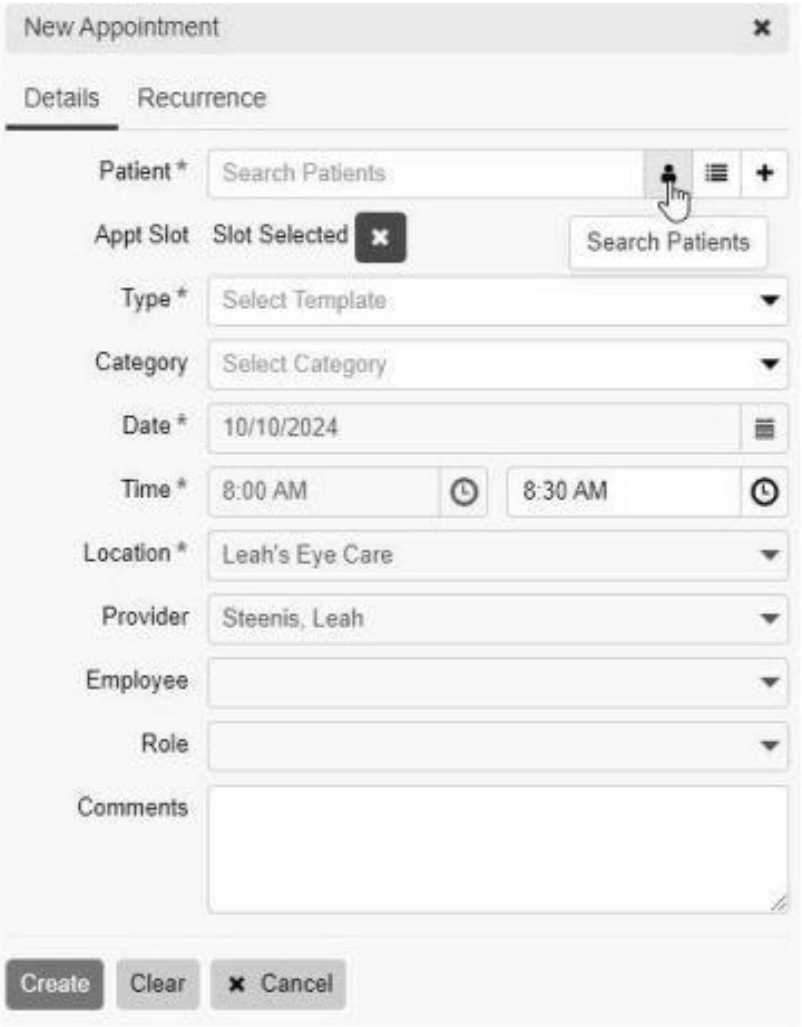


Free or available appointment slots that are open for booking will be displayed under the Agenda view as "Appt Slot (free)", you can also tell an appointment slot is available because it will display the provider name and say Appointment Slot.

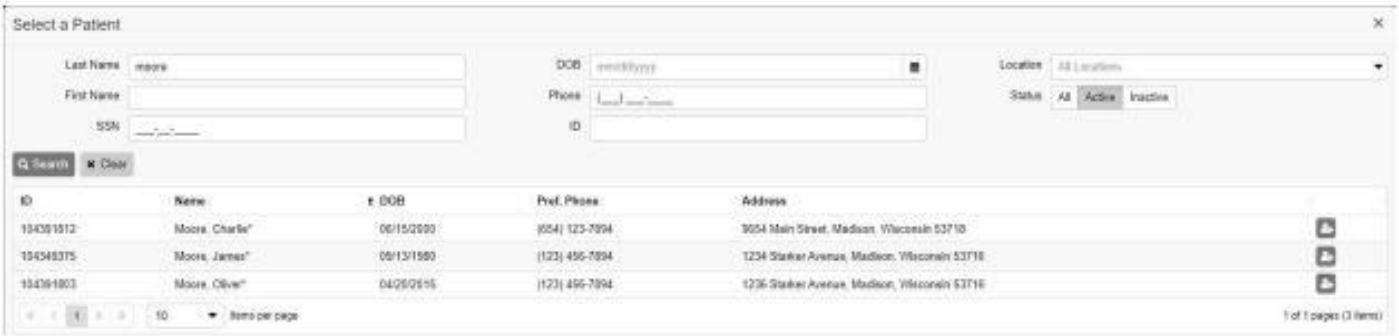
3. Single-click on the appointment slot you want to book. The Appointment Slot window will slide out on the right side. Select Book Appointment.



4. The New Appointment screen will open on the right side. You will need to search for an existing patient, or add a new patient to be seen

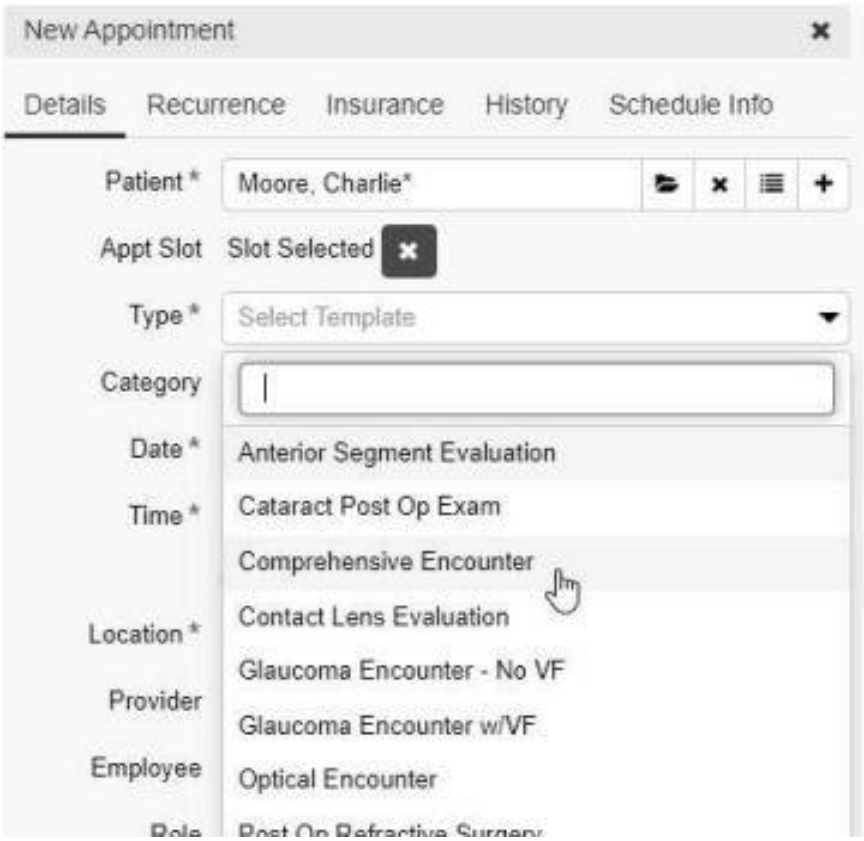


5. When you search for and find the patient you are looking for, single click the patient name to populate them into the Patient field on the New Appointment screen

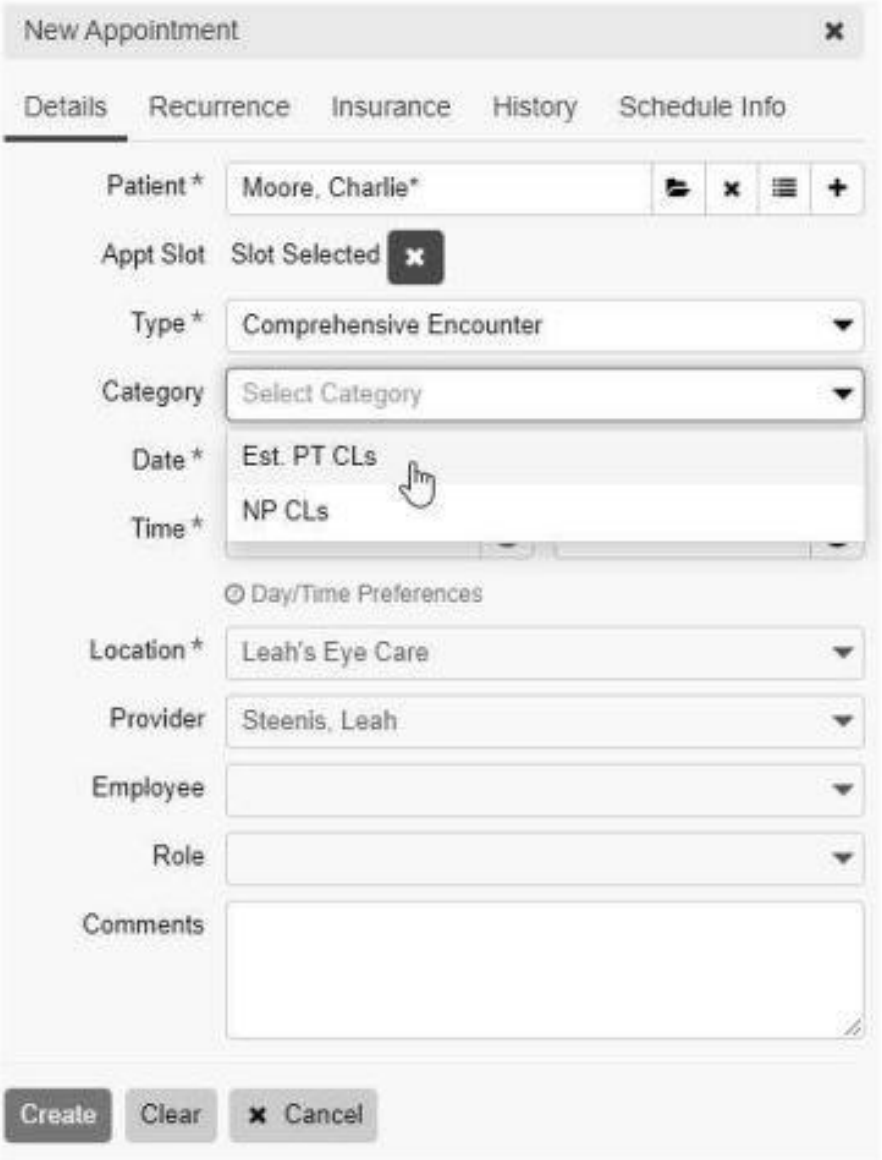


6. If you are adding a new patient, fill out the Add a Patient screen that pops up – all required fields will be marked with a red asterisk. After all information is entered in, select Add and the patient will be populated into the Patient field on the New Appointment screen

7. Select the Type dropdown to choose what kind of appointment the patient is coming in for. For example, a Comprehensive Exam, Medical Office Visit, etc



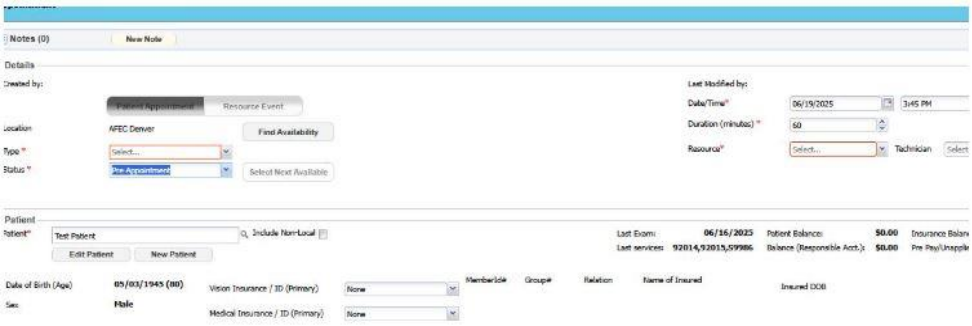
8. The Category dropdown is only used when subcategories are set-up in Admin. For example, some offices use subcategories to determine what type of Comprehensive, or medical exam they are seeing. If nothing is in the Category dropdown, this means that subcategories are not set up, or they are not set up for that particular exam template. You can still book an appointment without having the Category option selected. Select Create.



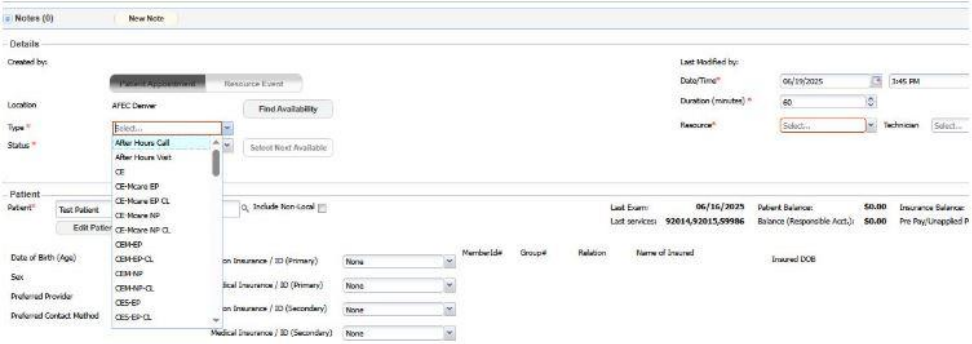
9. Your appointment will now display on the Schedule with the patient's name

1 Select the **Appointment Tab**.

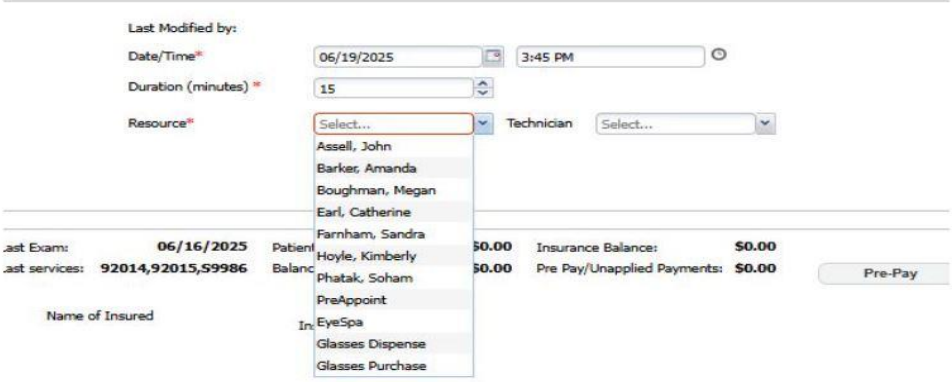
2 Select the **Pre-Appointment Status** in the drop-down menu.



3
- Select the appropriate **Appointment Type** from the drop-down menu.
- Mirror the appointment type for the following year (unless new presently, make established the following year).

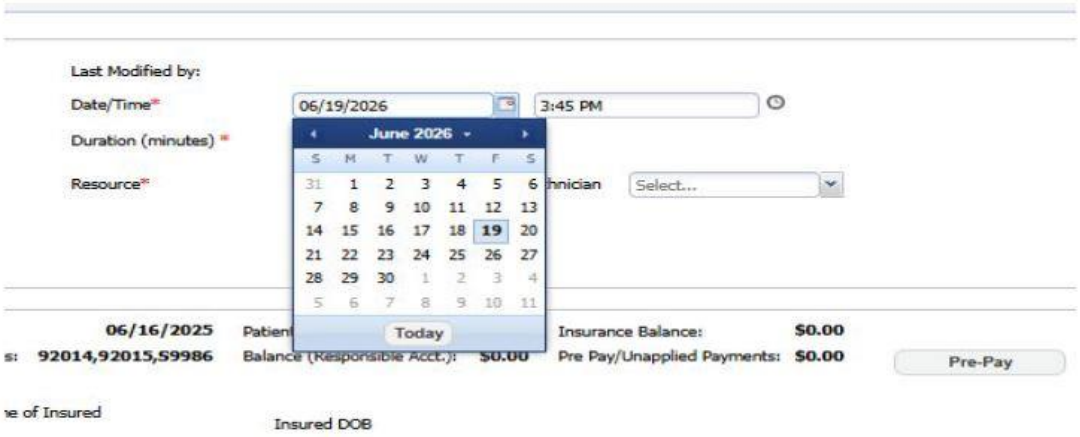


4 Select the appropriate **Provider** from the drop-down menu for the following year.



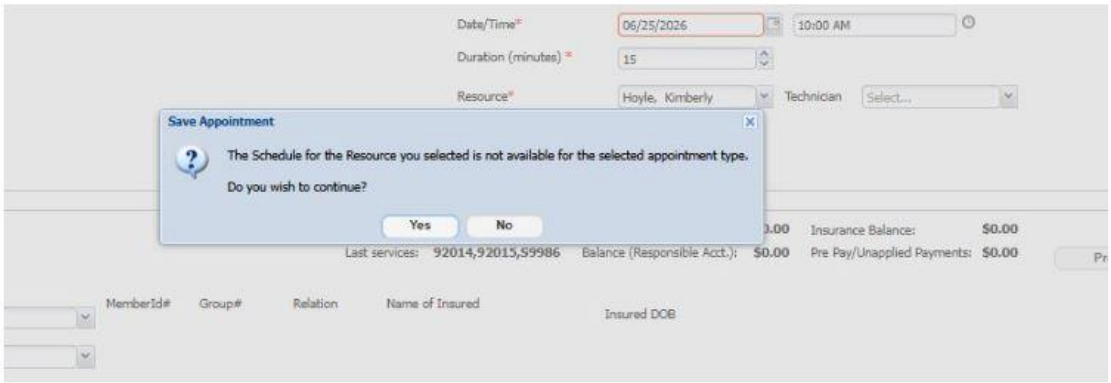
5

- Select the appropriate **Date** from the drop-down menu.
- **One Year** and **6 Days** from current appointment.



6 Scroll down to select the **Corresponding Time** to mirror (as closely as possible) the time the patient was seen.

7 Once you select save, make sure the reserved time is correct.



TOOLS & RESOURCES

TeamVision
Eye care, together.

EXAM HUDDLE

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Exam Results:		
Last Weeks Results:	**Daily Fill Rate:** # of booked exams/exam slots	**Upcoming Gaps In The Schedule?**

Celebrate: Start on a positive note

Purpose of the Huddle: Today we are here to talk about

Participation Moment: Let's practice this

- Practice friends & family, answering phones, confirmation calls, no show calls and fees

Problem Solve: Two minds are better than one

- Ask the team: What obstacles might we face? How can we overcome that? Why & How can we provide a better patient experience? What will this result in?

Review Action Times & End the Huddle: End with commitments

- Set the daily focus or recap what you are asking the team to do and when this should be done by. Gain team member commitments & buy in. Let the team know that you will be following up & what milestones will be along the way. End on a positive note!

WHY ANNUAL EXAMS ARE IMPORTANT

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Here are four clear and compelling facts about why annual eye exams are important:

1. **Early Detection of Eye Diseases:** Many serious eye conditions—like glaucoma, macular degeneration, and diabetic retinopathy—develop without noticeable symptoms. Annual exams help detect these early, when treatment is most effective.
2. **Vision Changes Happen Gradually:** Vision can shift subtly over time. Regular exams ensure prescriptions for glasses or contacts stay current and comfortable, supporting clear, strain-free vision. Remember- the inner structure of the eye (retina or optic nerve) does not have pain receptors so without a doctor looking at the back of your eye, you won't know what's going on.
3. **Overall, Health Monitoring:** The eyes can be a window into your overall health. Eye exams can reveal signs of systemic health issues such as high blood pressure, diabetes, and high cholesterol—often before other symptoms arise.
4. **Supports Academic and Work Performance:** Undiagnosed vision problems can affect reading, focus, and productivity. An annual exam helps ensure your eyes are working their best at school, work, and home.

Testimonial from Dr Nick Chiaramonti, Rosin Eyecare:

Annual eye health and vision examinations are an important part of everyone's healthcare regimen. They help detect vision problems and eye diseases early, often before symptoms become noticeable, and can also reveal signs of other health conditions. Early detection and treatment are essential for preventing vision loss and managing potential health issues.

When speaking with patient's here's what it might **Sound Like:**

- *[Doctor Name] believes in annual eye exams. Annual eye exams are about more than just your vision—they're an important part of your overall health. Even if you're seeing well, regular exams allow us to check for early signs of conditions like glaucoma, cataracts, and even diabetes or high blood pressure—many of which show up in the eyes before other symptoms appear. It's one of the easiest ways to stay ahead of your health and keep your vision clear and comfortable year after year.*
- *A lot can change in a year, especially when it comes to your eyes. Annual exams help us catch small changes before they become big issues. Even if your vision feels fine, we're checking for things like eye strain, dry eyes, or early warning signs of conditions that can affect your long-term vision. Plus, for anyone who wears glasses or contacts, it's the best way to make sure your prescription is still giving you the clearest, most comfortable vision possible.*
- *Mrs. Smith, is see Julie and Michael are also eligible for their exams with your VSP insurance. Did the doctor mention the importance of annual exams?*
    - *If not-educate- Annual exams are important to maintaining your overall eye health. Most things can be caught preventatively. Can I schedule Julie and Michael?*
    - *Yes-offer to schedule- We are accepting new patients. I can easily schedule that for you. Is there a particular day of the week that works best?*

WHY ANNUAL EXAMS ARE IMPORTANT

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Our goal is to retain and add all current patients. There are times when we don't get it right, and this may come up during the patient confirmation process. When a patient expresses a concern or a complaint, we need to be prepared.

Best practices for addressing patient concerns are:

1. Thank the patient for sharing their concerns or feedback.
2. Show empathy and be apologetic to how they are feeling, regardless of if its right or wrong.
3. Address the concern- attempt to solve the issue, even if you can't solve it immediately.
4. Share the feedback with the team, it's a great learning moment.

Acknowledging it and addressing it head on can change the outcome! Here's a few examples of what it could **Sound Like:**

- Hi [Patient Name], I wanted to personally acknowledge your last visit with us. I understand it didn't go as expected, and I truly want to apologize for that experience. Your comfort and trust are really important to us, and we take your feedback seriously. We've taken steps to make sure that what happened last time doesn't happen again, and we'd really appreciate the chance to provide the care you deserve moving forward. If there's anything we can do to make your next visit better, please don't hesitate to let us know.
- [Patient Name], I'm really sorry your last experience with us didn't meet your expectations. That's not the kind of visit we want anyone to have, and I completely understand your frustration. We value you as a patient, and we've made some improvements based on your feedback. We'd love the opportunity to make it right and show you the level of care and service we're truly proud of.
- Firstly, let me thank you for providing me that honest feedback and I'd like to apologize for the experience you had last time. I'd love to share this feedback with my supervisor to see what we can do to make it right for you.

Whether or not a patient returns to the practice, every team member should be able to explain why annual eye exams matter and handle any questions or concerns!

WHAT DOES IT SOUND LIKE?

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- Use the scrips below as a starting point if you're unsure of how to effectively communicate the message to your patient.
- Practice on yourself- call yourself and leave a voicemail so you can hear how it sounds.
- Ask your peers for feedback or how they might approach various situations.

Importance Of An Annual Eye Exam
 	
More details found HERE
	• [Doctor Name] believes in annual eye exams. Annual eye exams are about more than just your vision—they're an important part of your overall health. Even if you're seeing well, regular exams allow us to check for early signs of conditions like glaucoma, cataracts, and even diabetes or high blood pressure—many of which show up in the eyes before other symptoms appear. It's one of the easiest ways to stay ahead of your health and keep your vision clear and comfortable year after year.
	• A lot can change in a year, especially when it comes to your eyes. Annual exams help us catch small changes before they become big issues. Even if your vision feels fine, we're checking for things like eye strain, dry eyes, or early warning signs of conditions that can affect your long-term vision. Plus, for anyone who wears glasses or contacts, it's the best way to make sure your prescription is still giving you the clearest, most comfortable vision possible.
	• Mrs. Smith, is see Julie and Michael are also eligible for their exams with your VSP insurance. Did the doctor mention the importance of annual exams?
	  • If not-educate- Annual exams are important to maintaining your overall eye health. Most things can be caught preventatively. Can I schedule Julie and Michael?
	  • Yes-offer to schedule- We are accepting new patients. I can easily schedule that for you. Is there a particular day of the week that works best?

Negative Experience *More details found HERE*	• Hi [Patient Name], I wanted to personally acknowledge your last visit with us. I understand it didn't go as expected, and I truly want to apologize for that experience. Your comfort and trust are really important to us, and we take your feedback seriously. We've taken steps to make sure that what happened last time doesn't happen again, and we'd really appreciate the chance to provide the care you deserve moving forward. If there's anything we can do to make your next visit better, please don't hesitate to let us know. • [Patient Name], I'm really sorry your last experience with us didn't meet your expectations. That's not the kind of visit we want anyone to have, and I completely understand your frustration. We value you as a patient, and we've made some improvements based on your feedback. We'd love the opportunity to make it right and show you the level of care and service we're truly proud of. • Firstly, let me thank you for providing me that honest feedback and I'd like to apologize for the experience you had last time. I'd love to share this feedback with my supervisor to see what we can do to make it right for you.
Confirming Appointments *More details found HERE*	• **Live Patient:** Hi [Patient First Name], this is [Your Name] calling from [Practice Name]. I'm calling to confirm your eye exam with Dr. [Doctor's Last Name] on [Date] at [Time] — will you be able to make it? *Patient Responds YES*- Great! Just a quick reminder to bring all of your eyeglasses and contact lenses with you. Also, we do have a $50 fee if appointments aren't confirmed or canceled with 24 hours' notice, so thank you for confirming today! Let us know if anything changes. See you soon! Continues on next page...

WHAT DOES IT SOUND LIKE?

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Confirming Appointments *More details found HERE*	• **Voice Mail:** Hi [Patient First Name], it's [Your Name] from [Practice Name], just giving you a quick call to confirm your eye exam with Dr. [Doctor's Last Name] on [Day], [Date] at [Time]. When you come in, please bring all of your eyeglasses and contact lenses—anything you currently use helps us give you the best care. Please call us back at [Phone Number] to confirm your appointment. Just a heads-up: there's a $50 fee if it isn't confirmed or canceled with at least 24 hours' notice. We're excited to see you soon! • **Patient Wants To Cancel Appointment:** I understand that something has come up and you're not able to make your appointment. To make it easy, why don't we schedule a tentative appointment [set time frame] 2 months out and we will remind you of it closer to the time. We can adjust as needed, but it's important to get your eyes examined and we are happy to give you that reminder.
Friends & Family *More details found HERE*	• Mrs. Smith, is see Julie and Michael are also eligible for their exams with your VSP insurance. We are accepting new patients. I can easily schedule their annual exams. Is there a particular day of the week that works best? • Lisa, it was great helping you today. I'd love to be your family optician; Do you need to schedule any other family members while you're here? I noticed Sally was listed on your VSP plan. • I know you're waiting for someone to complete their eye exam, but while we are waiting can I offer you a complimentary cleaning and adjustment on your sunglasses? [one adjustment completed] Are you all up to date on your annual exam? If not, I can schedule that for you while we are waiting. • **OD:** Mrs. Smith, is everyone in the family up to date on their annual exams, including Bob and Sally? • **OD:** Anyone else in the family experiencing the same vision concerns as yourself?

Dispense
 	
More details found HERE
	• I'm so glad we found the right pair for you today! Just a quick reminder—make sure to come back next year for your annual eye exam. A lot can change in a year, and staying on top of your vision and eye health is the best way to keep everything clear and comfortable. Did we pre-appoint that for you when you were in last week?
	• Everything looks great with your new glasses! Before you go, just remember that eye health can change gradually, even if you don't notice it—so have we already scheduled your next exam around this time next year. It helps us monitor any changes and make sure your prescription stays accurate, and your eyes stay healthy long-term.
	• Lisa, it was great helping you today. Who is going to be the first family member to see you in your new eyewear? Are they also up to date with their annual exam?
	  ◦ No- okay, well we can take care of that. In fact in a week, you're going to receive an email to forward out to friends and family. This will give them a great discount when they come in. Let's take care of scheduling that appointment now?
	  ◦ Yes- great! I have a great offer they can take advantage of. In about 1 week you're going to receive an email to forward out to friends and family. This will give them a great discount when they come in. All they have to do is show us the email!

ROSIN SPECIFICS

TeamVision
Eye care, together.

ROSIN PRE-APPOINT PROCESS

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This Pre-Appoint process may vary by location depending on whether your site is part of the call program. **If you are not in a call center location, your team is responsible for completing all confirmation calls—** the call center will not make them for you. If you have any questions, please reach out to Lily.

Exam Pre-Appointed	• All Exams Are pre-appointed For The Next Year. • The pre-appoint is put on the live schedule – not NEE schedule.
30 Days Prior **Call + Email**	Office makes the first confirmation call. If the patient confirms the appointment, document in the notes section within the scheduled appointment and the patient profile within ECLiPS. • If the patient does not answer - a voicemail is left and a note made in the notes section of ECLiPS. • If the patient answers and reschedules or cancels the appointment – the staff or call center will complete that task. • Email reminder will also be sent from site email (template provided).
21 Days Prior **Call + Email**	Office makes the third confirmation call. If the patient confirms the appointment, document in the notes section within the scheduled appointment and the patient profile within ECLiPS. • If the patient does not answer – a voicemail is left stating that the appointment will be deleted but the need for annual eyecare is important and the patient should phone back to reschedule their appointment. • Email reminder will also be sent from site email (template provided). • If the patient answers and RESCHEDULES the appointment – the staff or call center will complete that task. • If the patient answers and CANCELS the appointment – the staff or call center will complete that task AND document in the notes section within the scheduled appointment and the patient profile within ECLiPS.
AT 14 DAYS, YOUR UNCONFIRMED PRE-APPOINTS SHOULD BE CLEARED SO YOU CAN FILL YOUR BOOKS!	
24 Hours Prior To Pre- Appoint	All offices complete a 24-hour confirmation call except T063 and T077 – who perform a 3-call process that begins the morning, the day prior to the appointment. See next slide.
If changing/deviating from this process, reach out to your Field Leader.	

Click HERE for the Routine Confirmation Process

ROSIN EMAIL TEMPLATE

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Subject Line: Please Confirm your Appointment

Body of Email:

Dear [Patient Name],

This is a reminder of your upcoming eye health appointment.

Please reply CONFIRM to this email within the next 24 hours to confirm this appointment. OR call us at [Office Phone Number] to confirm, reschedule, or cancel your appointment.

Name: [Patient Name]

Date: [Date of Appointment}

With: [Enter Dr. Name]

Office Address: [Enter Practice Address]

Please remember to bring:

- Any insurance cards and/or third-party insurance information
- Your prescription eyewear (eyeglasses, sunglasses, and contact lenses)
- A list of your most current medications
- The name of your family physician

If you are a contact lens wearer, please make sure to have them on for this appointment.

Please notify us by phone of any needed changes to this appointment.

We look forward to seeing you soon!

[Practice Name]