

# CIAO! OPTICAL GUIDE

Open & Close Ciao! Optical

Taking Patient Payments

Banking & Sales Audit

Returns & Exchanges

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- All Returns, Exchange, & Sales Audit notes must be documented in both the Patient Demographics section of Ciao! Optical (POS) and when prompted in XStore (the tendering application within POS).
- If you have questions, check the Toolkit first. If the answer isn't there, reach out to your Field Leader.

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# OPENING CIAO! OPTICAL



**OPEN:** Before you can open for business (tender transactions), you must open the store first then the registers. Once Ciao! Optical is open, you may use the point-of-sale system.

- There is no action required for the credit card processing device (assumption is that a batch processed during end-of-day procedures the night before).
- You must open and close on Register 1

[CLICK HERE](#) to watch a video

## Let's breakdown this process:

1

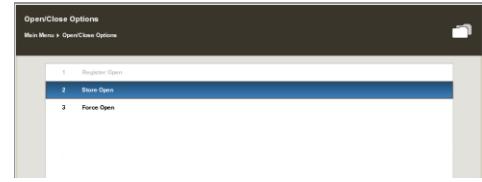
- Using EL Network credentials, **login** to the back office and click **OK** to bypass the non-home office prompt



2

### Select:

- 2: Open/Close Options
- 2: Store Open



3

### Select:

- Yes to open the store
- Confirm business date by clicking OK



4

### Select:

- View & acknowledge any closing comment by clicking OK
- Select Yes to open the register



5

### Complete **Till Count** by denomination

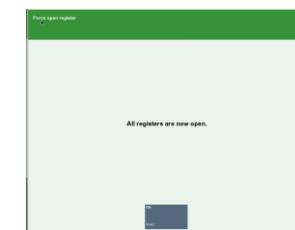
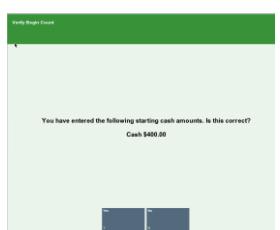
- Click F5-Counting Complete once all funds are entered
- Opening float fund should be \$400



6

### Confirm:

- Opening funds \$400- Yes
- Receive confirmation that all registers are open

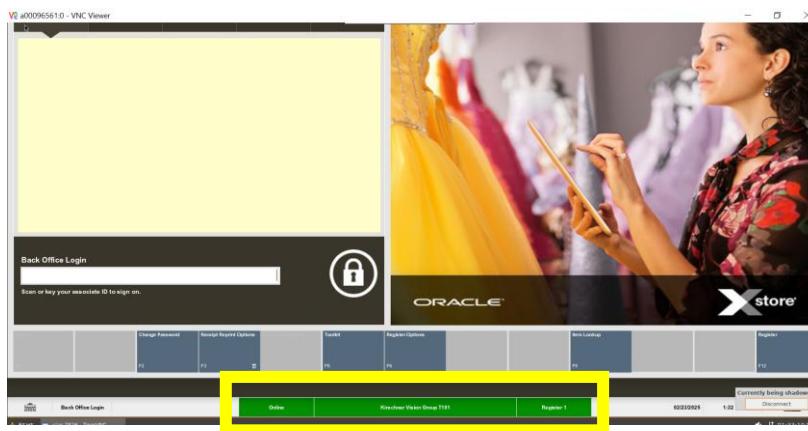




6

## Confirm:

- All registers should be open, this includes iPads
- Your Ciao! station should reflect both the site and register as open (green), reflecting that you are ready for business



## Troubleshooting:

- Confirm your Ciao! station was closed the night before. You will know if it was left open because the site name and location will be green prior to opening (date will also be on previous day). Call SSS to assist you in closing out the previous day. You will have to wait 15 min before you open the station for the day.
- If your iPad does not open with your registers, click the red dot on the bottom of the iPad to open the register up.
- Call SSS or use OneLink with any opening/closing issues.

# CIAO! OPTICAL BASICS



As you know, our credit card processing devices are not integrated with Ciao! Optical. Our process for tendering credit cards includes entry into Ciao! Optical (last 4 digits of CC number, expiration date, and amount) and into the credit card terminal. **Entries into both should always be on the same date of service/purchase.**

Downstream, Sales Audit reviews and reconciles what's posted into Ciao! Optical and the credit card terminals. If there is any discrepancy, they are going to directly contact the site for resolution.

### 3 Ways To Have A Discrepancy:

1. Amounts between Ciao! Optical and your credit card terminal don't match.
2. Record in Ciao! Optical but no corresponding record in your credit card terminal.
3. Record in your credit card terminal but no corresponding record in Ciao! Optical.

### Sales Audit Discrepancy Process:

- Sales Audit will review and reconcile transactions.
- When a discrepancy is identified, an email will be auto-generated and sent to your site's shared TeamVision email. Ideally, these will come Tuesday of each week for prior transactions that couldn't be reconciled.
- Upon receipt of that email, the site will need to research, take action, and respond back to the email with resolution or clarification. Sales Audit will then update their records. You need to reconcile these as soon as possible, no later than Friday of the week the email discrepancy was received.
- If no resolution is provided, a 2nd attempt/notification will be sent the following week.
- If no resolution is provided on the 2nd attempt/notification, a 3rd email will be sent to the site and to TeamVision Operations. The Operations Team will contact the site directly for action and resolution.
- Please see the attached information which are the sample templates you will see. The information provided and actions to be taken will vary based on the discrepancy type. The email will provide all the steps needed to take action and provide resolution.

Please review this with your team. If everyone ensures the process where all Ciao! Optical and credit card terminal transactions are keyed accurately (**amount, last 4 of card and expiration date**) on the same business date, your site shouldn't have any discrepancies.

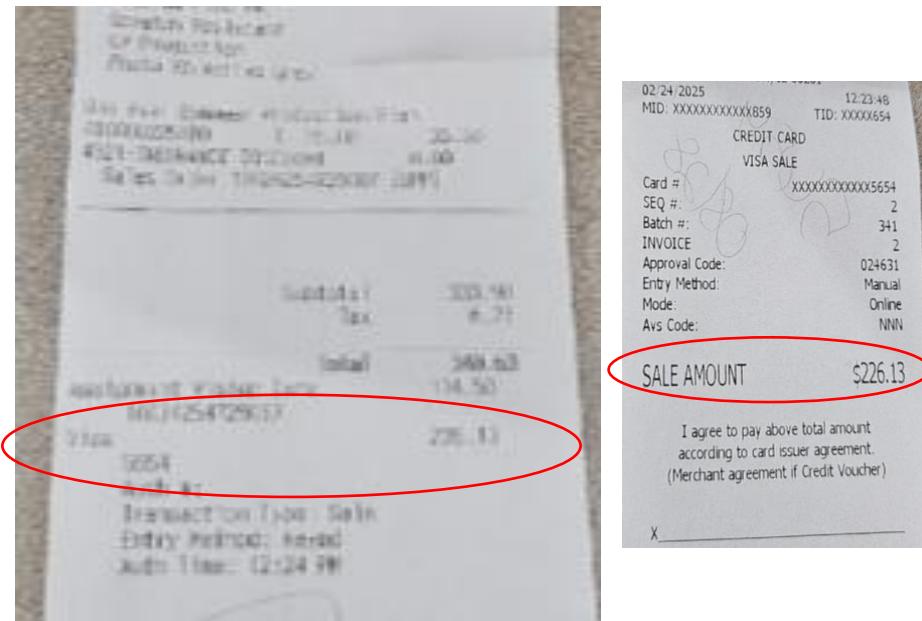
If there is something preventing your ability to key a transaction into Ciao! Optical, please let the TeamVision Operations Team know right away (missing service, etc.). We will do our best to resolve/update. We are here to help and support you!



The best way to balance at night is to tender patient's correctly prior to the patient leaving the office. This gives you the opportunity to correct the tender if you have under or over charged in Ciao! Optical or the credit card devices. **At the time of Tender in Ciao! Optical, it is always a best practice to email & print the patient receipts.**

## Tips for success:

- **Card Payments:** Once you tender out in your credit card device, look at the Ciao! Optical receipt and confirm you see the same amount listed on both receipts.
  1. Always make sure you write the **expiration date on the credit card terminal receipt** so it's accurate in Ciao! Optical.
    - If you ever forget, please use 12/31 as a default.
    - The amount and last 4 of the card number must always match.
  2. Best practice is to circle the payment amounts on both receipts and staple together.
- **Check:** Prior to clicking Complete Transaction in Ciao! Optical, hold the check up next to the screen and confirm correct amount.
- **Cash:** Prior to clicking Complete Transaction in Ciao! Optical, ensure you have counted and entered the correct cash amounts.



## Additional notes:

- You should not tender cash on your iPad, you must tender on desktop
- On the iPad, to complete a zero- charge transaction, hit the three lines to complete the sale

# HOW TO READ A RECEIPT



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Funds are distributed on different lines based upon Usual & Customary and Insurance deductions. **At the time of Tender in Ciao! Optical, it is always a best practice to email & print the patient receipts.**

Receipt #: 2000004 Date: 12/6/21 @ 12:50 PM Store: 29013 Register: 2 Cashier: Katie 775880 Salesperson: 775880 (Katie)	<p>Usual &amp; Customary Fees • cost of services/materials</p>																																																																											
<table><thead><tr><th>Item</th><th>Qty</th><th>Price</th><th>Amount</th></tr></thead><tbody><tr><td>Order For: <del>TESTMASTER</del></td><td></td><td></td><td></td></tr><tr><td>Sales Order: 10000774129013</td><td></td><td></td><td></td></tr><tr><td>92015 Refraction</td><td>1</td><td>49.00</td><td>0.00</td></tr><tr><td>20500001689838</td><td>1</td><td></td><td>(49.00)</td></tr><tr><td>4321-Insurance Discount</td><td></td><td></td><td></td></tr><tr><td>Sales Order 10000774129013</td><td></td><td></td><td>[Doctor Service]</td></tr><tr><td>Addon]</td><td></td><td></td><td></td></tr><tr><td>92014 Est Comprehensive</td><td>1</td><td>137.00</td><td>75.00</td></tr><tr><td>20500001863382</td><td>1</td><td></td><td>(62.00)</td></tr><tr><td>4321-Insurance Discount</td><td></td><td></td><td></td></tr><tr><td>Sales Order 10000774129013</td><td></td><td></td><td>[Doctor Service]</td></tr><tr><td>ADD-ON ONLY PACKAGE ARTICLE</td><td></td><td></td><td></td></tr><tr><td>92310 CI Evaluation Std</td><td>1</td><td>49.00</td><td>49.00</td></tr><tr><td>20500001866352</td><td>1</td><td></td><td>0.00</td></tr><tr><td>4321-Insurance Discount</td><td></td><td></td><td></td></tr><tr><td>Sales Order 10000774129013</td><td></td><td></td><td>[Contact Evaluation]</td></tr><tr><td>General Eye Wellness \$20</td><td>1</td><td>20.00</td><td>20.00</td></tr><tr><td>20500001865287</td><td>1</td><td></td><td></td></tr></tbody></table>	Item	Qty	Price	Amount	Order For: <del>TESTMASTER</del>				Sales Order: 10000774129013				92015 Refraction	1	49.00	0.00	20500001689838	1		(49.00)	4321-Insurance Discount				Sales Order 10000774129013			[Doctor Service]	Addon]				92014 Est Comprehensive	1	137.00	75.00	20500001863382	1		(62.00)	4321-Insurance Discount				Sales Order 10000774129013			[Doctor Service]	ADD-ON ONLY PACKAGE ARTICLE				92310 CI Evaluation Std	1	49.00	49.00	20500001866352	1		0.00	4321-Insurance Discount				Sales Order 10000774129013			[Contact Evaluation]	General Eye Wellness \$20	1	20.00	20.00	20500001865287	1		
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	<p>Amount Due (adds up to Subtotal) • Will be both patient and/or insurance amounts • In this example:<ul style="list-style-type: none"><li>Patient pays \$80.60:<ul style="list-style-type: none"><li>\$20 wellness products</li><li>\$49 CI Fitting</li><li>\$10 copay</li><li>\$1.60 Tax</li></ul></li><li>Insurance pays \$65</li></ul></p>																																																																											
	<p>When these amounts match, patient is paying (no insurance)</p>																																																																											
	<p>This is a combine amount from the insurance (plan pays) and the patient (any out of pocket costs) • The \$145.60 is the total amount the site will be credited towards their sales targets.</p>																																																																											
	$65+80.60 = \$145.60$																																																																											
	<p>This is the amount we expect to be reimbursed by the insurance carrier (plan pays amount)</p>																																																																											
	<p>This is the amount collected from the patient (out of pocket cost, copays for exam/materials)</p>																																																																											

To reprint a receipt, you can:

- If it's the last transaction tendered, click F3 -Reprint Receipt
- Use Toolkit App and reprint (save as PDF and email if needed)
- Look up patient in the Ciao! Optical Back Office, Electronic Journal and reprint (Click [HERE](#))
- Once you've completed the transaction, you can not email directly from Ciao! Optical

# CHANGE ASSOCIATE



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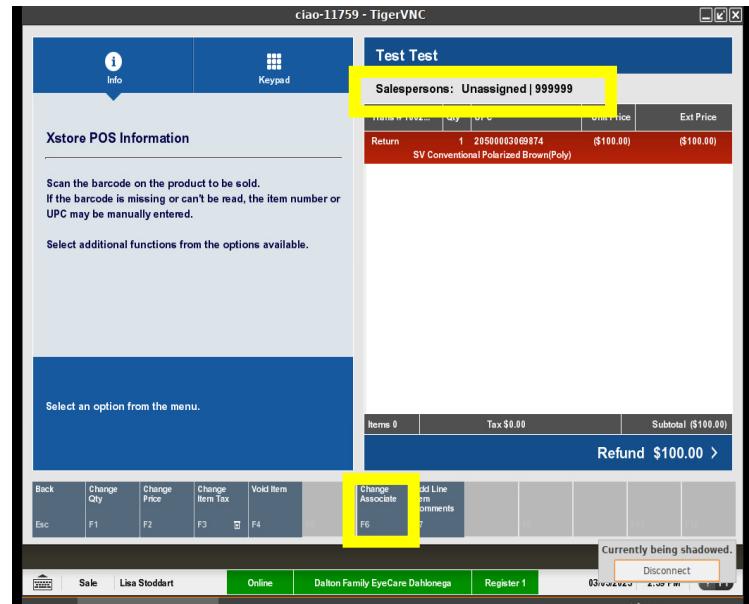
If a team member forgets to log out of Ciao! and another employee enters materials or services into Ciao! without signing in, you can **change the employee in XStore** so that credit goes to the correct team member.

- You may also need to do this if you are returning and re-ringing transactions (example: Unknown Reporting).
- Only select individuals will have access to do this (PM, APM, etc.) Access can be granted or changed as needed. Ask your field leader or integration week ops manager for directions on how to modify permissions in Ciao! Back Office.

## To Change Employee:

1

- Click F6- Change Associate



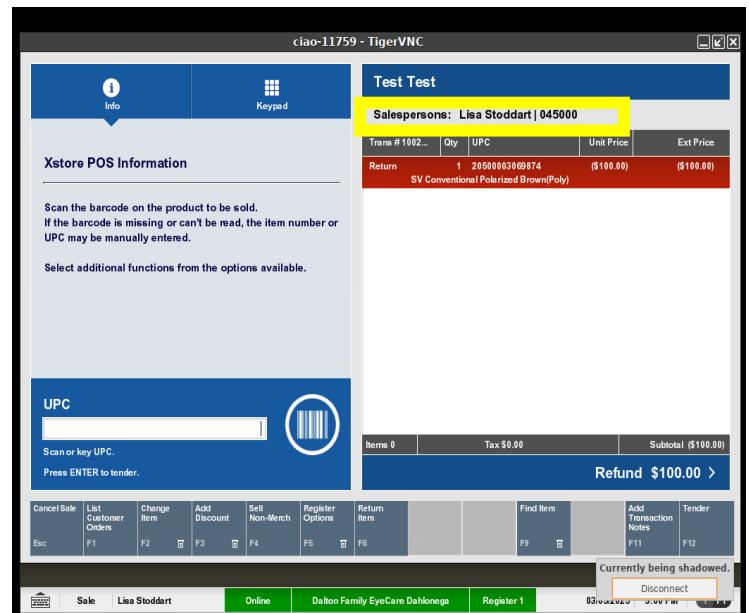
2

- Enter the **team member ID** needing credit for the transaction and hit Enter



3

- Confirm you now see the new team member's name on the top of the screen
- **Note- you may need to do this with for multiple line items (example: Frame, Lens, EPP)**



# ADD A DISCOUNT



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There are different types of discounts that will be applied for various promotions and patient satisfaction reasons:

Customer Order (Ciao! Optical)	XStore (Ciao! Optical)
<ul style="list-style-type: none"><li><b>Autofire:</b> Discount applies automatically.</li><li><b>Manual:</b> Enter a discount code from the Pricing &amp; Promotional Card.</li></ul>	<ul style="list-style-type: none"><li><b>Discount Code:</b> Enter a promo code.</li><li><b>Manager Discretion:</b> Applied as a line item or transaction discount (fixed \$ or % off).</li></ul>

## Additional Notes:

- Find discount codes on the [Pricing & Promotions Card](#) in the Toolkit.
  - Do not print to ensure you have the latest version.
- For exchanges, apply the same discount used in the original sale (Ciao! Optical and Xstore).
- Post-integration, more discounts may be honored (e.g., legacy guarantees).

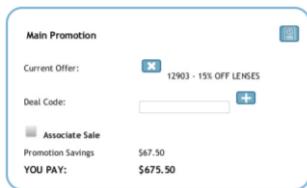


## Let's review the different types of discounts

### Autofire Deals in Ciao! Optical

Smart promotions that auto-apply in Customer Order if the order/product qualifies. No deduction code needed.

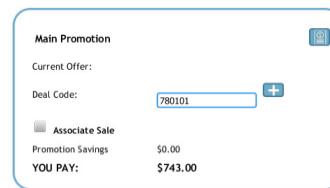
- Example: Instant Contact Lens Savings, 15% off Lens only, etc.



### Manual Deals in Ciao! Optical

Some qualifying promotions don't auto-apply. Entering the deduction deal code into Customer Order will apply the promotion or savings to applicable orders.

- Example: Multiple pair discount, 20% off sun, etc.



### Discounts in Ciao! Optical- XStore

Discounts need to be manually entered in the Tendering Application (Xstore). If a code is not a deal, it is a discount. A discount code is needed. Note-Eyewear Protection Plans can not be discounted.

- 1 Click F3- Add a Discount
- 2 Select Discount Type (option 1, 2, 3)



Enter discount code found on Promo Card.

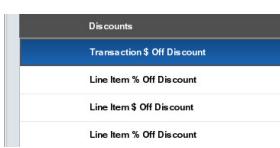
1 Add Discount Code



2 Add Service Reconciliation Item Discount



3 Add Service Reconciliation Transaction Discount



\$ or % discount off a single item

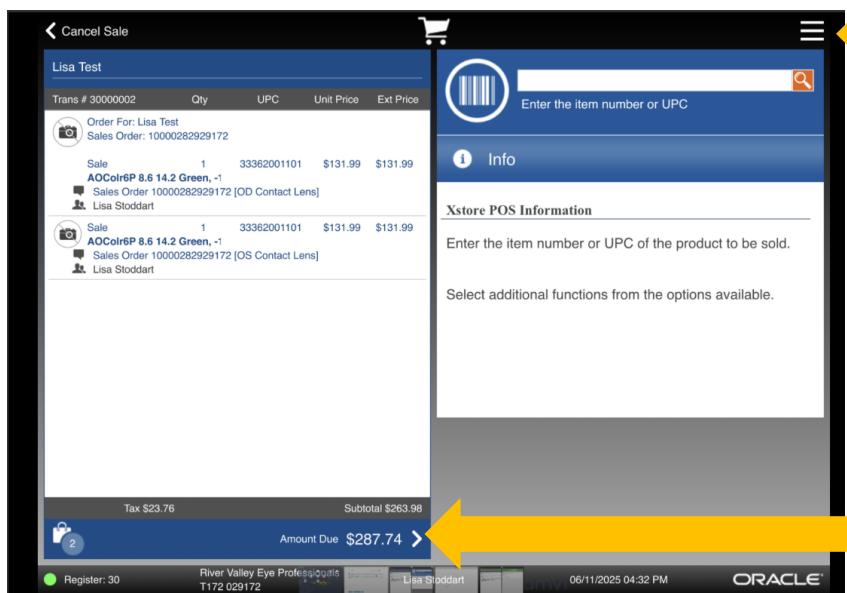
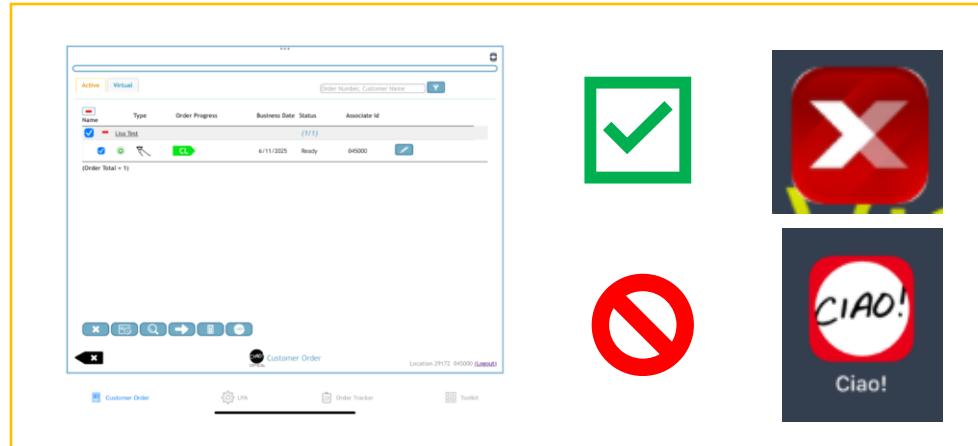


Enter amount you'd like to discount off entire transaction



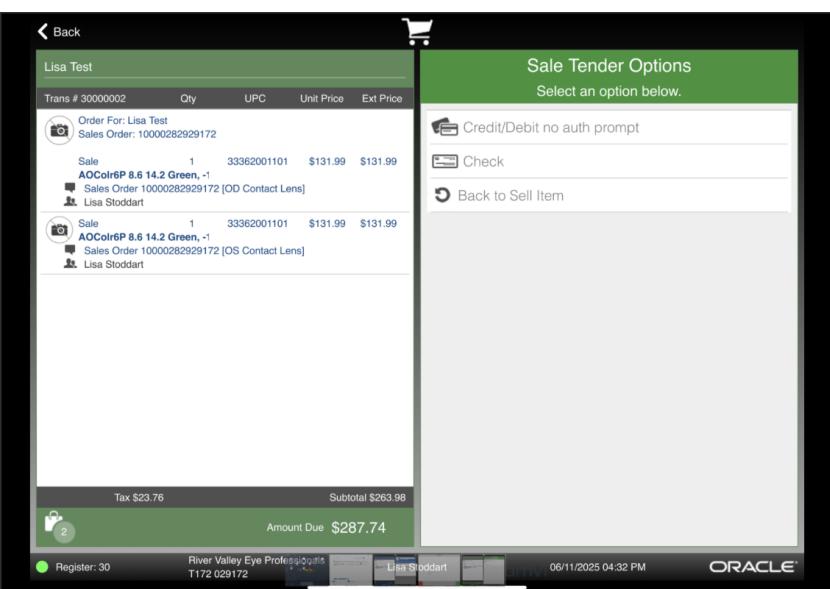
If you're logged into Ciao! Optical through the Xstore app, you can tender **card and check** transactions directly from your iPad.

For **cash payments**, you can build the order on your iPad, but must **tender from a desktop**.



- Add discount
- Change associate
- Complete transaction

Click the Amount due to begin to tender transaction



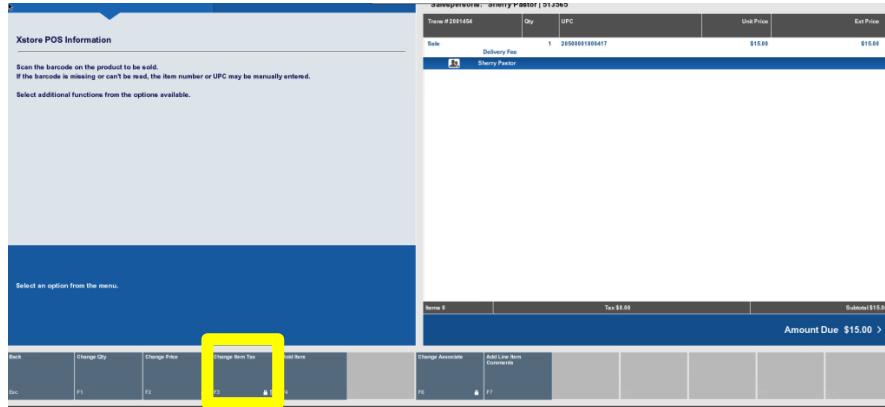
Note- when tendering on the iPad your patient will be prompted to sign an electronic HIPAA and Financial acknowledgement for insurance purposes.



If tax is not applying correctly, open a ticket with **SSS immediately**. Tax exemption edits should be extremely rare. You may add or remove tax **only** if the patient is in the office and immediate tendering is required.

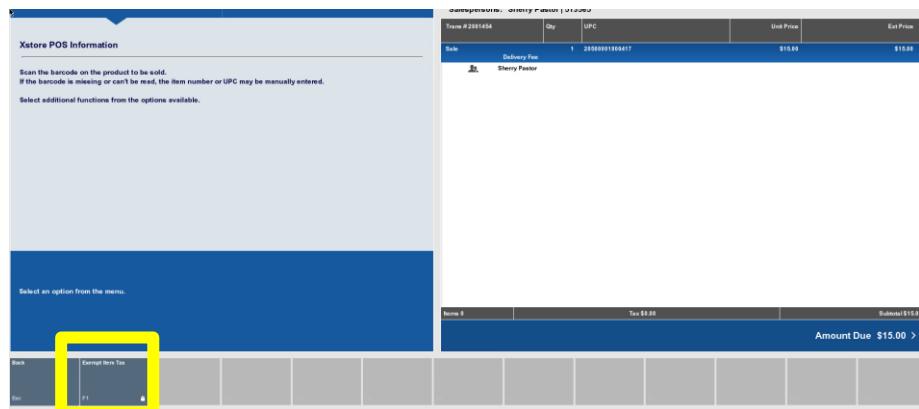
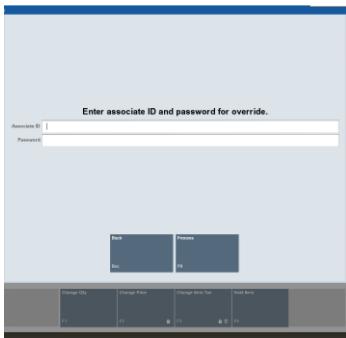
1

**Click F3- Change Item**



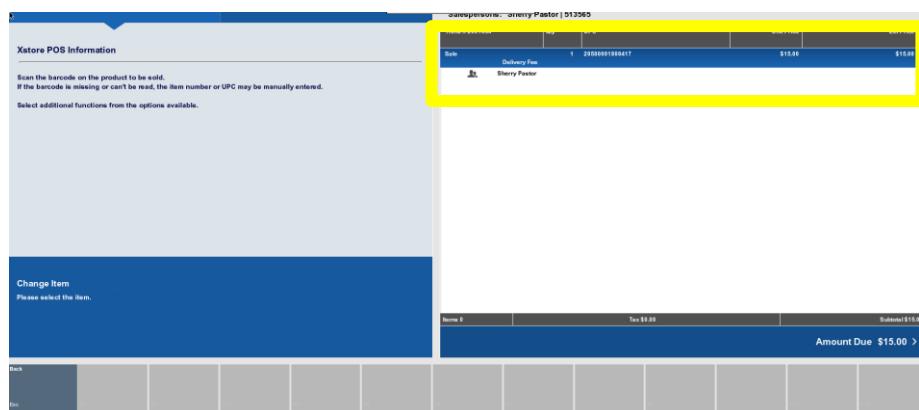
2

**Click F1- Tax Exempt**  
 • Some team members will need supervisor approval to continue



3

**Highlight the item you want to tax exempt and hit Enter on the keyboard**



4

**Enter 0 (zero) for a placeholder in practice name and address and click Save**

# PRICE CHANGE



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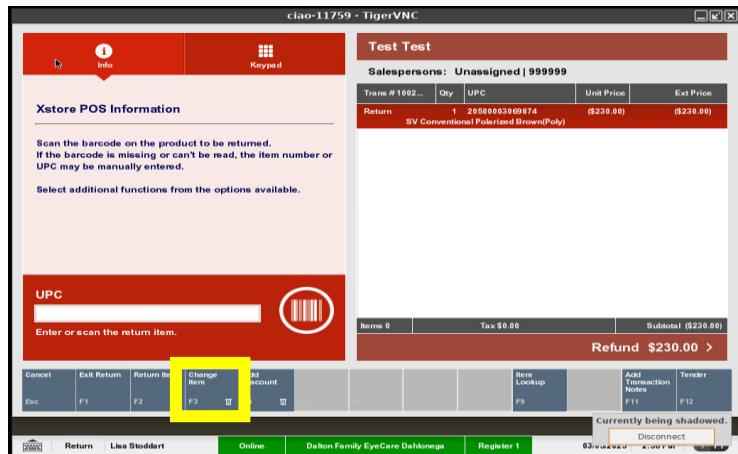
Activity. Ciao! Optical Pricing is accurate 99% of the time. You may need to complete a price changes in Ciao! Optical when we missed a frame during a Price Increase Activity.

Price Change should only be used in the rare occurrence of fixing a refund or a charge while the patient is in the office. Long term we need to address the root cause vs. changing price in Ciao!. Partner with your direct supervisor if you need to use Price Change more than once per month.

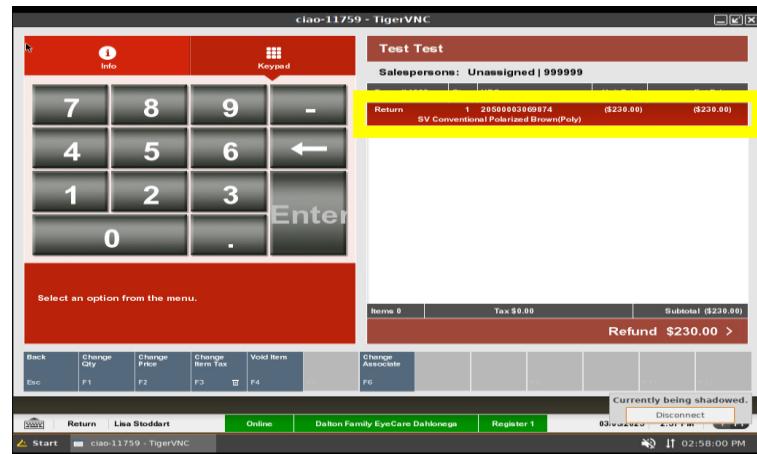
You can complete a price change on for sale items and refund/exchanged items.

## Let's breakdown this process:

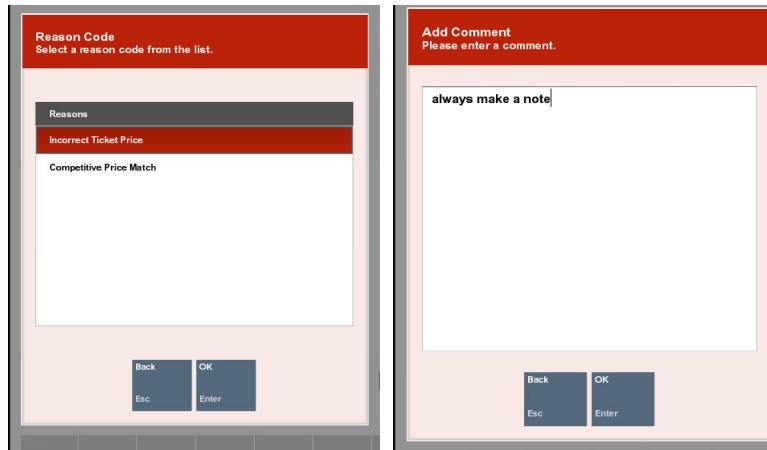
### 1 Click F3- Change Item



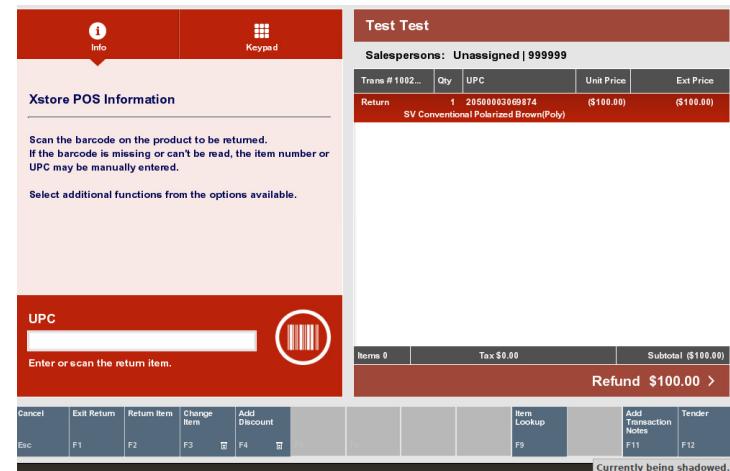
- 2 Select item you'd like to change and click **Enter**
- 3 Enter the **New Price**



- 3 Select a **Reason**
- 4 Make a **Note** as to why completing a price change



- 4 Confirm the new price is visible



# ACCESSING THE ELECTRONIC JOURNAL



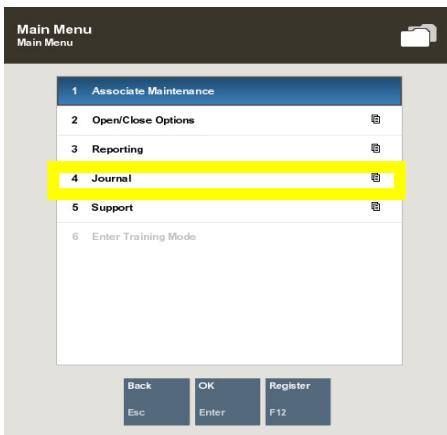
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The Electronic Journal is a Sales Record within Ciao! Optical Back Office. You will use this for various reason, like identifying closing discrepancies, or confirming how to address phantom orders.

## To Access the Electronic Journal:

1

- Login to the Ciao! Back Office
- **Select 4- Journal**
- **Click Ok**



2

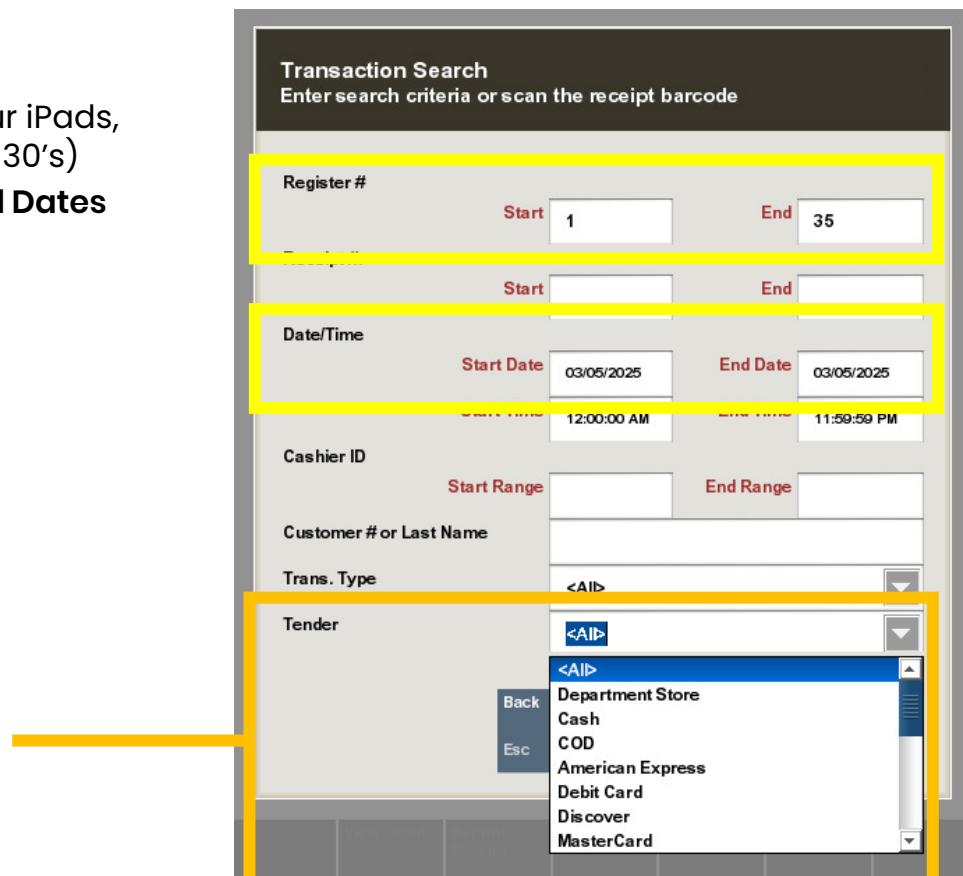
- **Select 1 -Electronic Journal**
- **Click OK**



3

- Enter the **Start and End Registers** (including your iPads, which are usually in the 30's)
- Enter your **Start And End Dates** (time is not required)
- Click OK/Run Report

Note- you can also filter my tender type, which is helpful when investigating a specific payment type.

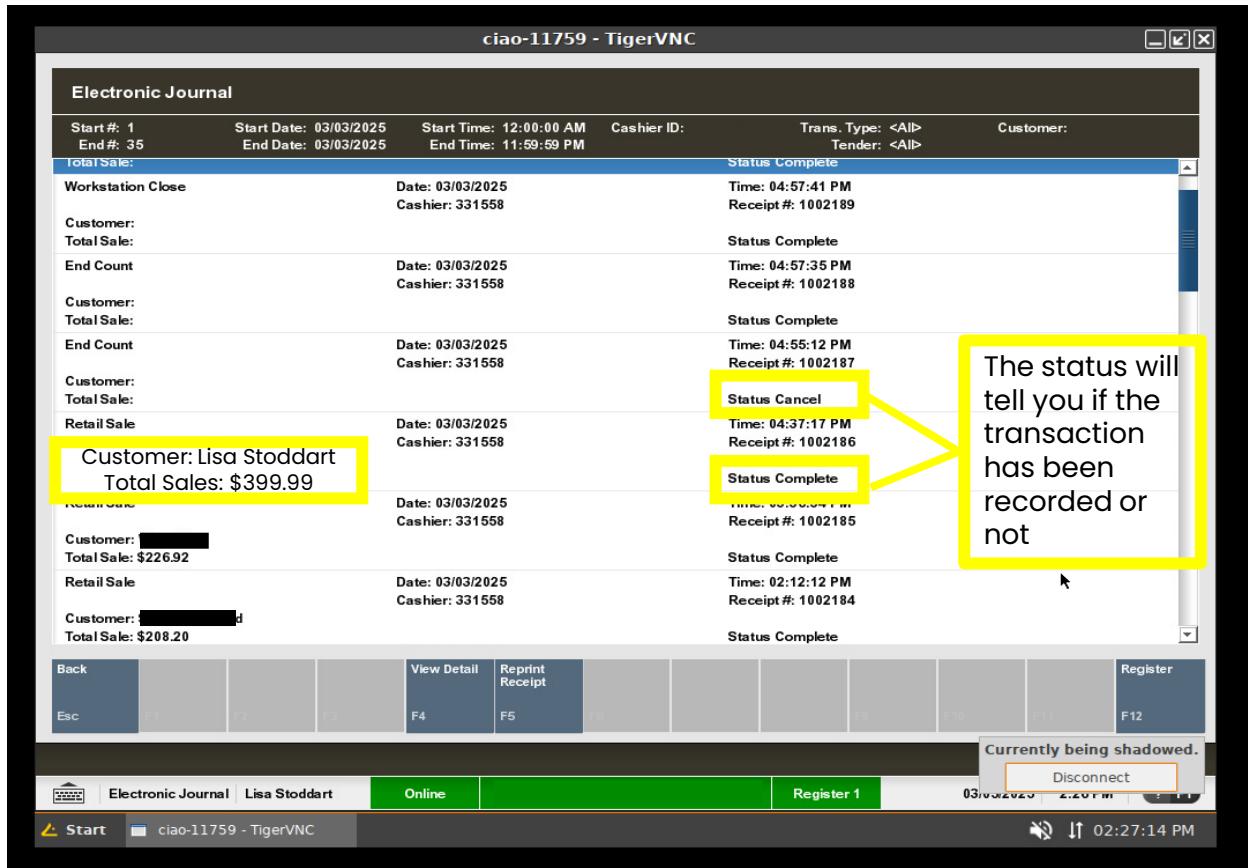


# ELECTRONIC JOURNAL TIPS & TRICKS



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The Electronic Journal is a Sales Record within Ciao! Optical Back Office. You will use this for various reason, like identifying closing discrepancies, or confirming how to address phantom orders. [Click here to learn how to access the electronic journal.](#)



## Additional Notes:

1. Patient names and transaction amounts will be listed.
2. Check the status of your transaction in the **Status Column**:
  - **Completed**- indicates the transaction has been recorded (services/materials should be visible in the Transaction History in Ciao! Optical).
  - **Cancelled**- indicates the transaction was stopped in Xstore (no record will be visible in Transaction History in Ciao! Optical).
  - **Orphaned**- indicates a corrupted transaction (payment and transaction will not be recorded in Transaction History or Electronic Journal).
3. You can see the time Ciao! Optical was opened & closed.

# MID DAY RECONCILIATION



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No required, but a helpful tip to streamline your closing process, is to do a quick mid day check (or an hour or so before closing) to confirm accurate totals in Ciao! Optical & your credit card devices.

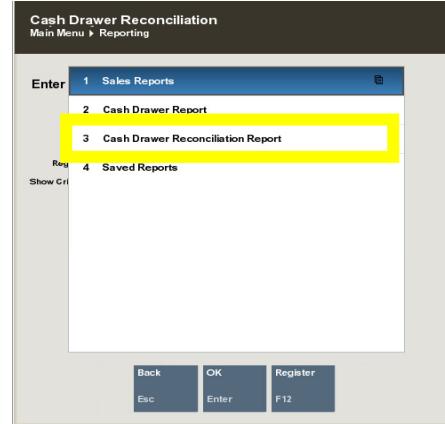
1

- Login to the Ciao! Optical Back Office
- Select Number 3- Reporting



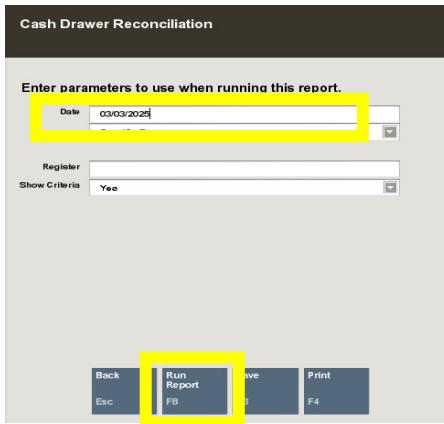
2

- Select 3- **Cash Drawer Reconciliation Report**



3

- Enter the date you'd like to run the report for (likely same day)
- Click F8 to **Run Report**



4

- **Card:** Run your Sum by Tender Type Report on all credit card devices and determine a **Grand Total** by card type to compare to the report generated in Ciao!
- **Cash:** count your funds and verify against report
- **Check:** Review check and verify
- **Care Credit:** Verify on website & report

Card Type	#Trn	Amount
Credit	2	1388.98
Records:		0.00
Tip:		0.00
Total:		1388.98
Total w/o tip:		1388.98
Card Type:		AMEX
Type		\$Amount
Card Type:		AMEX
Type		\$Amount
Sale:	1	596.00

Register: 1		Till	Tender	Register Count	System Count	Over/Short
Date	03/03/2025 08:38:10 AM	REGISTER1	Debit Card	0.00	0.00	0.00
			Department Store	0.00	0.00	0.00
			American Express	0.00	0.00	0.00
			Discover	0.00	0.00	0.00
			MasterCard	49.00	49.00	0.00
			Visa	823.70	823.70	0.00
			ATH Card	0.00	0.00	0.00
			MasterCredit	0.00	0.00	0.00
			Managed Vision Care	45.00	45.00	0.00
			Cash	400.00	400.00	0.00
			Assignment Vision Care	444.58	444.58	0.00
			Safety	0.00	0.00	0.00
			US Traveler Check	0.00	0.00	0.00
			Home Office Check	0.00	0.00	0.00
			Sales Tax	0.00	0.00	0.00
			Card	0.00	0.00	0.00
			Check	0.00	0.00	0.00
			Medical Billing	524.99	524.99	0.00
			Cash	0.00	0.00	0.00
			Total	2,287.27	2,287.27	0.00

Go to the next page for  
Troubleshooting tips if you don't  
balance (i.e., your totals don't match).

# TROUBLESHOOTING MID DAY RECONCILIATION



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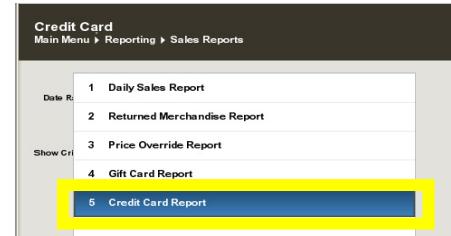
There are two different reports that will help you identify the error:

- **Credit Card Report:** a report that will show you all card transactions **Tendered** in Ciao! Take your credit card Sum by Tender report or each individual Merchant Receipt and compare them to identify the missing charge.
- **Daily Sales Report:** a report that will break down each transaction (payment totals AND the services entered). Confirm that all services paid for have been entered into Ciao! and or Credit Card Device.

## To Generate the Credit Card Report:

1

- Login to the Ciao! Optical Back Office
- Select Number **3- Reporting**
- Select Number **5- Credit Card Report**
- **Click OK-Enter**



Date Range: 03/03/2025 - 03/05/2025								
Date & Time	Reg	Cashier	Transaction	Card	Type	Auth	Tender	Total
03/03/2025 10:16:20 AM	1	331558	1002179	2621	MasterCard		\$49.00	\$108.20
03/03/2025 11:00:48 AM	1	331558	1002181	6336	Visa		\$143.71	\$230.34
03/03/2025 11:46:00 AM	1	331558	1002183	1411	Visa		\$144.99	\$262.54
03/03/2025 12:08:22 PM	3	331558	3000147	6723	Visa		\$257.00	\$381.80
03/03/2025 02:13:30 PM	1	331558	1002184	4353	Visa		\$109.00	\$208.20
03/03/2025 03:36:54 PM	1	331558	1002185	9052	Visa		\$39.00	\$226.92
03/03/2025 04:38:24 PM	1	331558	1002186	5377	Visa		\$130.00	\$291.38

## To Generate the Daily Sales Report:

1

- Login to the Ciao! Optical Back Office
- Select Number **3- Reporting**
- Select Number **1- Daily Sales Report**
- **Click Ok-Enter**



Daily Sales									
Date: 03/03/2025				Prior Days Included: 0 Days			Employee: All		
Date	Trans	Reg	Item	Description			Employee	Qty	Price
03/03/2025									
				Transactions			Transactions		Net Sales
								9	\$1,887.27
				Total			Total	9	\$1,887.27
Date: 03/03/2025	Trans	Reg	Item	Description	Employee	Qty	Price	Unit	Override
	1002179	1	2050000168983	92015 Refraction	331558	1	\$49.00	\$0.00	\$33.00
		8			331558	1	\$39.00	\$0.00	\$0.00
		2050000186592	Optomap		331558	1	\$119.00	\$0.00	\$119.00
		8			331558	1	\$165.00	\$0.00	\$165.00
		2050000401535	92004 New Comprehensive		331558	1	\$170.00	\$0.00	\$116.80
		1							
				Total					\$108.20
	1002180	1	2050000168983	92015 Refraction	331558	1	\$49.00	\$0.00	\$29.00
		8			331558	1	\$39.00	\$0.00	\$0.00
		2050000186591	92250 Fundus Photography		331558	1	\$119.00	\$0.00	\$70.11
		1			331558	1	\$165.00	\$0.00	\$165.00
		2050000401536	92014 Est Comprehensive		331558	1	\$170.00	\$0.00	\$101.00
		9							
				Total					\$132.89
	1002181	1	2050000186591	92250 Fundus Photography	331558	1	\$119.00	\$0.00	\$53.66
		1			331558	1	\$165.00	\$0.00	\$165.00
		2050000401539	92014 Est Comprehensive		331558	1	\$170.00	\$0.00	\$101.00
		9							
				Total					\$230.34
	1002182	1	2050000168983	92015 Refraction	331558	1	\$49.00	\$0.00	\$49.00
		8			331558	1	\$39.00	\$0.00	\$0.00
		2050000401539	92014 Est Comprehensive		331558	1	\$165.00	\$0.00	\$120.00
		9							
				Total					\$45.00

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# RETURNS & EXCHANGES



## TeamVision Guarantee:

Our goal is 100% satisfaction! If you're not completely satisfied with your purchase within the first 30 days, just let us know. We're committed to making it right. Always included:

- Unlimited free cleanings and adjustments
- Access to eye care experts to help with all your vision care needs

## Details:

- Products must be in their original condition. For contact lenses, boxes must be unopened (factory sealed) and unexpired.
- Product can be exchanged or returned within 30 days of the date which is the later of (i) original sale date or (ii) date of dispense (if applicable). This applies only to the original purchase.
- This guarantee does not cover accidental damage, scratches, or breakage to eyewear/product.
- We do participate in EssilorLuxottica Frame Manufacturer Guarantee.
  - Patient will self initiate the [claim online](https://customersupport.luxottica.com/wcsstore/luxottica.html) (<https://customersupport.luxottica.com/wcsstore/luxottica.html>)
- We do not participate in Lens Guarantees (i.e., 1-year Crizal Guarantee)
- Prescription changes at no cost to the patient:
  - 30-day Rx Change
  - 90-days for patients who have Cataract Surgery
- Select frame brands (Maui Jim, Nuance, Ray-Ban Meta) may have unique guarantees and processes. See the Operations Guide for those brands for additional details.
- During your integration week, you will be provided direction with how to handle Legacy Frame and Lens guarantees.

At time of sale-form of payment	Form of refund
Card	Card
Cash	Cash* OR Home Office Check
Check	Home Office Check
Care Credit	Care Credit

\*Cash refunds can only be given if enough cash is on hand- **never go below \$400 float** (example- \$500 cash refund, the till must have \$900)

- If a cash paying patient requests a refund but no cash has been received that day, refund via Home Office Check.
- For all Home Office Checks- confirm patient address prior to Ciao! Optical Tender.
- Patient will receive Home Office Check within 14 Business days.
- Home office checks may also be used for insurance refunds (initiated by your biller).
- \$400 cash float not for petty cash.

# EPP, RETURNS & EXCHANGES OVERVIEW



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You may be prompted to return or exchange services and materials due to operational or patient request. In certain scenarios this means re-applying insurance coverage into Ciao! Optical.

A few examples:

- Patient changes their mind on eyewear or contact lens selection
- Biller asks you to re-key an order due to billing error
- Patient using Eyewear Protection plan

**Various commodities offer different return/exchange options:**

*You can Return or Exchange all Frame, Lens, and Complete pair orders.*

5/30/2024	PR 15WS, Brn Trt, Slv 8056597437479	SV Conv Non-Polarized Tintable (Plastic)	3001460	
<i>When the icon is gray, you can not proceed and will need to Return and Re-key the commodity. Tender together to net out a zero balance or any funds due.</i>				
4/9/2025	29006		8010893	
4/20/2025	29006	OD(R): Precision 1 OS(L): Precision1 for Ast	8011019	

## Tips for Success:

1. From purchase history, click the to expand out the order and see if insurance was attached
  - Here you can see the Insurance Carrier & Plan ID, Authorization, and member ID Number
2. Click the paper to view plan pays, discounts, and patient copays
  - Click the printer icon for a paper copy

**Vision Care Benefit Summary**

Customer Order Id: 10000382729167 EPP: Yes - Active Dispense Date: Dispensing Associate:

Delivery Method: N

Retail Price	Plan Savings*	Amount Due**
\$510.00	\$293.00	\$217.00

OX3218, Slv Blk, 54/18/138  
Single Vision Asph  
Polycarbonate  
Aspheric Lens  
Premium Plus AR  
Scratch Resistance  
UV Protection  
Subtotal

Retail Price	Plan Pays	Plan Discounts	Copay	Amount Due
\$215.00	\$49.00	\$164.00	\$52.00	\$52.00
\$80.00	\$14.00	\$66.00	\$25.00	\$25.00
\$45.00	\$0.00	\$45.00	\$35.00	\$35.00
\$20.00	\$0.00	\$20.00	\$20.00	\$20.00
\$13.00	\$0.00	\$13.00	\$8.00	\$8.00
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
\$15.00	\$15.00	\$0.00	\$0.00	\$0.00
\$16.00	\$78.00	\$432.00	\$217.00	\$217.00

\* Plan Savings includes funded benefits and plan discounts  
\*\* Amount Due excludes additional discounts and taxes applied

Customer: Plan Name: Plan Type: Assignment Account Code: Order #: McWilliams, Michael VSP-BAS Assignment 1837699 10000382729167

Print Tray Ticket

Receipt Details

Measurements/ER2

Copy Order



## Additional Notes:

- All returns and exchanges must include a note in the **Patient Profile (Demographics)** section of Ciao! Optical explaining the reason.
- All **Manager Discretion Discounts** must also have a note in the Patient Profile explaining why the discount was applied.
- **Contact lenses and exam services** cannot be exchanged in Ciao! Optical—they may only be returned.
  - To process an exchange, create a new sales order and tender both the return and the new order together.
- Returned or exchanged **Frames and Contact Lenses must be recovered**. Refer to the [Inventory Management Guide](#) for more details.
- When processing an **EPP or exchange**, if a discount was applied in Xstore at the time of the original sale (e.g., Free Pair Certificate or manager discretion), it must be **re-applied in Xstore** during the exchange.
- If a patient changes their **frame or lens design/features** during an exchange or EPP, the **insurance claim must be edited** to recalculate plan pays, discounts, and copays.
- If **no changes** are made to the frame or lenses, you typically do **not** need to edit the insurance claim.
- In some cases, you may need to adjust frame or lens pricing (e.g., due to company-directed price updates).
- **Insurance exchanges** may need to be communicated to your biller depending on the situation.
- Always look at the order completion screen in ciao! to see how your exchange will be processed.



Click the Link below to access how-to videos:

- [Return in Ciao! Optical](#)
- [Exchange in Ciao! Optical](#)
- [Add/Remove EPP in Ciao! Optical](#)
- Click [HERE](#) for the EPP Guide in Toolkit
- Click [HERE](#) for the Inventory Management Guide

# HOW TO RESOLVE REFERENCE CHART



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Use the chart below to understand how to resolve common issues that arise:

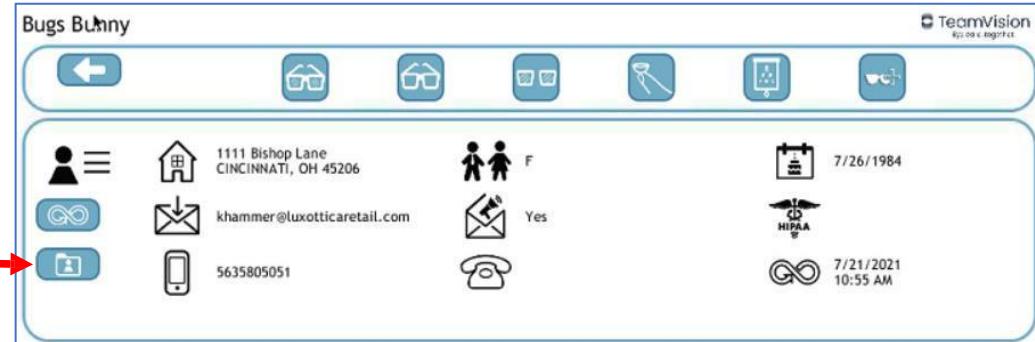
<b>Patient is using EPP and the original lens is no longer available</b>	<ul style="list-style-type: none"><li>Communicate lens change to the patient and upgrade at no charge.</li><li>Discount the upgrade fee in Xstore- charging only the EPP Copay.</li><li>Place a note in the patient demographics section of Ciao! Optical.</li></ul>
<b>I've just tendered out my order but it's still on the Active Orders List</b>	<ul style="list-style-type: none"><li>Likely this is a <b>Phantom Order</b>.</li><li>Based on the type of order- correct by re-entering into Ciao! Optical.</li><li><a href="#">Click HERE</a> for directions.</li></ul>
<b>At closing, you have an imbalance</b>  <ul style="list-style-type: none"><li>Resolve prior to closing Ciao! Optical</li><li>If not resolved same day, email: SalesAudit1@luxotticaretail.com</li></ul>	<ul style="list-style-type: none"><li>Confirm there are no Phantom Orders (no gray pencils) on the Active Orders list of Ciao!</li><li>Research the error by using your Electronic Journal, Credit Card Report, and Daily Sales Report.</li><li>You will likely cross reference this with your Sum by Card type report or the individual credit card confirmation.</li><li>You may need to partner with various team members to get to the root cause.</li></ul>
<b>Your Insurance Biller has asked you to correct an Insurance Claim in Ciao! Optical</b>  <ul style="list-style-type: none"><li>If patient owes balance, do not rekey until patient funds are collected</li><li>Refund: patient not in office- you can issue a Home Office Check</li></ul>	<ul style="list-style-type: none"><li>Confirm patient address if processing Home Office Check.</li><li>If needed, reinstate benefits (Eyemed, Aetna, etc.)</li><li>From Ciao! Optical <b>Purchase History</b>- Return item and leave on <b>Active Orders List</b>.</li><li>Re-enter order into Ciao! Optical and make insurance correction, leaving on <b>Active Orders List</b>.</li><li>Select the new sale and return and <b>Tender</b> together.<ul style="list-style-type: none"><li>Xstore will net out any difference (refund or funds due)</li></ul></li></ul>
<b>I have a patient that wants to pay a statement balance in office</b>	<ul style="list-style-type: none"><li>You can direct the patient to pay via the directions/link on their statement <b>OR</b></li><li>If your practice is set up with a Transaction Express Account, you can take Card Balances in Office via the App online (Rosin offices have BofA device)</li></ul>

**Pre-Integration Balances should not be entered into Ciao! Optical. Your site-specific process will be reviewed during integration week.**



At any point, you need to exchange or return an item, start here:

- 1 Search the patient and locate the **Purchase History Folder**  in the patient profile.



- 2
  - The patient History Folder will hold a list of all commodities tendered through the patient's profile.
  - Greyed out symbols means that the order has already had an action performed. These orders cannot be returned or exchanged; you will need to find the applicable order to act (e.g., multiple exchanges).

The image shows a table titled 'Purchase History' for 'Bugs Bunny'. The table has columns for Type, Business Date, Brand/Site, Frame / AFA, Lens, and POS Transaction Id. Each row represents a transaction with specific details like date, brand, and product information. To the right of the table, a legend indicates that the blue 'Return' icon  and the grey 'Exchange' icon  are used to identify whether an order can be returned or exchanged.

Type	Business Date	Brand/Site	Frame / AFA	Lens	POS Transaction Id		
⌚	8/3/2021	29002			1001486		
⌚	7/30/2021	29002			1001457		
⌚	7/30/2021	29002	RX5279, Blk, 55/18/145 713132442975	SV RB 1.59 Amplified Blu w/ Optimized AR	1001453		
⌚	7/29/2021	29002			1001446		
⌚	7/29/2021	29002			1001445		
⌚	7/23/2021	29002		OD(R): Acuvue Oasys OS(L): Acuvue Oasys	1001412		
⌚	7/21/2021	29002	RX5279, Blk, 55/18/145 713132442975		1001402		
⌚	7/21/2021	29002	RB2132 52 NEW WAYFARER, Blk, Grn 805289048527	SV Con Trans GEN8 Brn Czl RockAR (Poly)	1001403		

Showing 1 to 11 of 11 entries



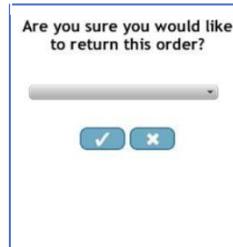
3

- From the pop-up, select the appropriate reason code from the dropdown to indicate why the patient is returning or exchanging.
- Checkmark will allow you to proceed (x will cancel action).
- The ATF Price Adjustment option routes you directly to the Active Orders List (AOL) where you move right into tendering. (example-long wait on order, \$25 refund).

## EXCHANGE



## RETURN



Exchange (2 drop down options)		Return (single list)
Service Quality	Restyle Frame (Fit/Look)	Rx/Acuity
	Restyle Lens (Type/Material)	Payment Correction (Tender/Insurance)
	Dr Rx Change	Service Promise Delay (Late Order)
	Rx Entry/Measurements Correction	Order Cancelled (Not Available/Out of Range)
	Order Cancelled (Not Available/Out of Range)	Multiple Remakes
	Add, Remove, Use EPP	Defective Product
	Nuance Related	Contact Lens Exchange
	ATF Price Adjustment	
Product Quality	Frame Flaw	Service or Product Dissatisfaction
	Lens Flaw	Price Value
	Lens Not Made to Order	
	Damage Replacement	Nuance Related

4

- Returns-** Complete (tender) the refund **OR** if re-keying an exam or contact lenses, tender the refund and the new sale together.
- Exchanges:** The screen will go pink indicating you are in exchange mode.
- Adjust Rx as needed.
- Indicate what commodity you are exchanging- Complete Pair, Lens Only (POF), or Frame only (lenses not needed).



- Click [HERE](#) EPP Redemption + Insurance on original order details.

# THE PROCESS



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- Enter Frame, Lens, Measurements and Complete the Order- just as you would a new sale.
- **Insurance:** If new frames and lenses are selected, you will need to edit the insurance claim.

**TIP:** Returns/Exchanges on the Active Orders List will have a pink frame around it.

Name	Type	Order Progress	Business Date	Status	Associate Id
Bugs Bunny	Frame	(0/1)	8/2/2021	Ready	290015
Aug-TV3	Frame	(0/2)	8/2/2021	In Progress	
	Frame	(0/1)	8/2/2021	In Progress	
Finance Comp	Frame	(0/1)	7/30/2021	In Progress	290031

6

- Refund or Collect any balance due from the patient.
- Click F12- Complete (tender) transaction in Ciao! Optical.
- Note: patient must sign receipt-store copy only along with team member completing the transaction.

Original Payment	Refund Tender in Ciao! Optical
<b>Cash</b>	<ul style="list-style-type: none"> <li>• Large amount-Select <b>Home Office Check</b> <ul style="list-style-type: none"> <li>• <b>Confirm address</b> in ciao! Optical profile prior to tender</li> </ul> </li> <li>• Small amounts- If you have accepted cash that day, and have the amount owed, you can refund with cash <ul style="list-style-type: none"> <li>• Always maintain \$400 float fund.</li> </ul> </li> </ul>
<b>Check</b>	<ul style="list-style-type: none"> <li>• Large amount-Select <b>Home Office Check</b> <ul style="list-style-type: none"> <li>• <b>Confirm address</b> in ciao! Optical profile prior to tender</li> </ul> </li> </ul>
<b>Card</b>	<ul style="list-style-type: none"> <li>• Refund via original form of payment in credit card device</li> <li>• <b>Finix Only-</b> Card must be present</li> </ul>
<b>Care Credit</b>	<ul style="list-style-type: none"> <li>• Refund in Care Credit portal</li> </ul>

# RECEIPT REPRINT FROM CIAO! OPTICAL



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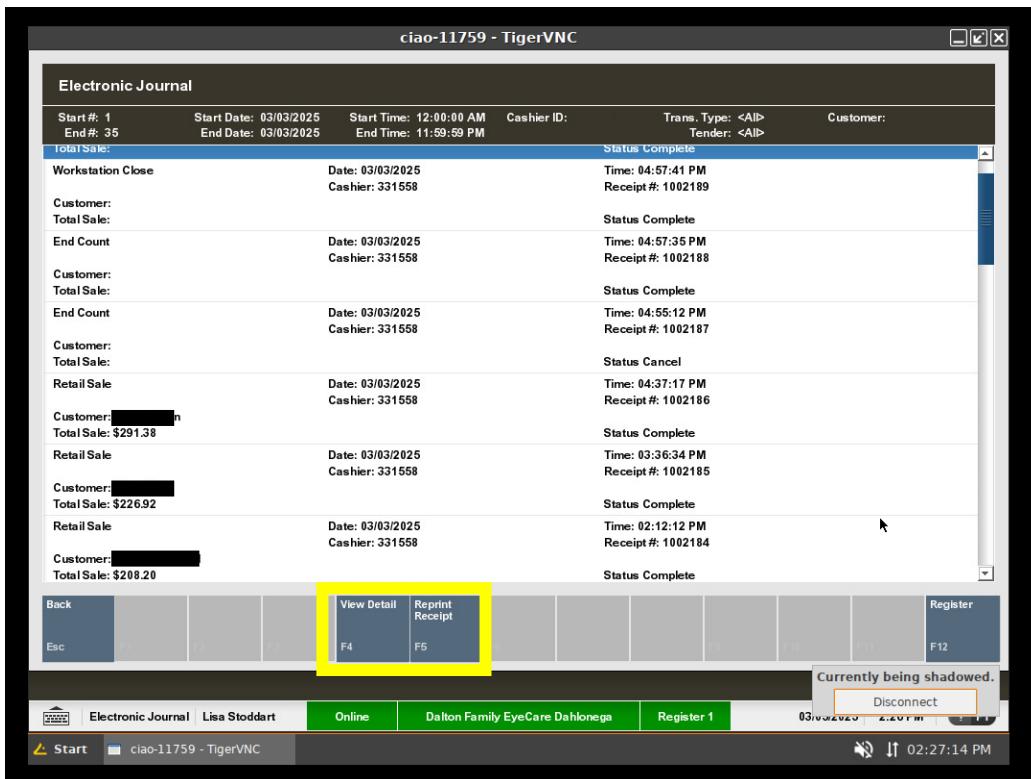
From the Electronic Journal, you can reprint patient receipts. [Click here to learn how to access the electronic journal.](#)

1

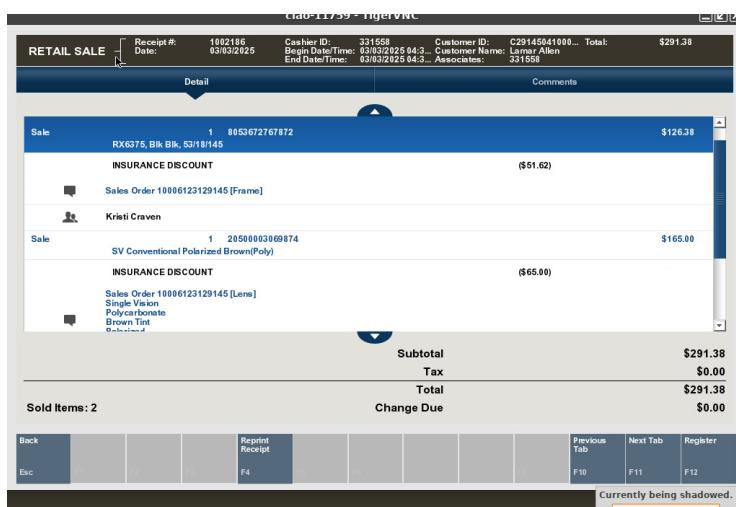
- Locate your patient on the Electronic Journal

2

- Select your patient
- Click F5- Reprint Options



Note- F4 will allow you to see the receipt from the patient view.





## What is a phantom order in Ciao! Optical?

A Phantom Order (visible by a grey pencil on Ciao! Optical Active Orders List) is a transaction that has several errors on the backend which causes the transaction to **disappear from the patient order history**. The transaction becomes corrupt and even when tendered, the order will disappear, and products will not/cannot be ordered. These are more likely post integration and should taper off.

### Possible Causes:

- Multiple insurance edits
- Insurance radio button selection
- Moving back and forth from Xstore to Ciao!
- Physically closing Xstore when a transaction is pulled up

### How will I know I have a phantom order?



The order will show up on the back-office journal and/or will remain in Ciao! on the Active Orders List with a **Gray Pencil**.

In LPA, you will see the order as **Staged**, and you will not get an Order Ticket after tendering (both contact lens and optical orders).

### Tips for avoiding phantom orders:

- Use Price Calculator in Ciao! to review and confirm multiple pair pricing
- Once you pull an order to tender into Xstore, complete timely otherwise this can cause it to timeout and result in a Phantom Order
- Avoid moving orders **multiple times** from Xstore back to Active Order List
- If you need to cancel the payment in Xstore DO NOT close Xstore, select **Cancel**
- Limit the number of people accessing the patient order at the same time
- Minimize multiple edits to the order

### What should I do if I have a phantom order?

- Start by looking at the [Status](#) of the order in the [Electronic Journal](#)
- See next page for how to correct

Status	Means	Action Needed
Cancelled	<ul style="list-style-type: none"> <li>The order was exited in Xstore and the tender was not recorded.</li> <li>The order cannot be transmitted in LPA.</li> </ul>	<ul style="list-style-type: none"> <li>Identify the reason the order was cancelled and resolve any issues, if needed.</li> <li>Process the tender if applicable.</li> </ul>
Orphaned	<ul style="list-style-type: none"> <li>The connection between Xstore and Ciao! Optical was lost.</li> <li>The tender will be recorded by Sales Audit, but <b>not</b> in Ciao! Optical.</li> <li>The order cannot be transmitted in LPA.</li> </ul>	<ul style="list-style-type: none"> <li><b>In Ciao! Optical:</b> Enter the new sale and take it to tender. Apply insurance if needed.</li> <li><b>In Xstore:</b> While tendering the new sale, do a <a href="#">No Receipt Return</a> for the original/orphaned transaction amount.</li> <li><b>Complete the Transaction:</b> Both the new sale and refund should be on the <b>same encounter</b>.</li> </ul>
Complete	<ul style="list-style-type: none"> <li>Order (tender) completed</li> </ul>	<ul style="list-style-type: none"> <li>no action needed unless you have a gray pencil in Ciao! Purchase history.</li> </ul>



## How to Reprocess the Order:

### Orphaned and Phantom Order with EPP Purchases: All Insurance & Non-Insurance Transactions

- Re-enter the order in Ciao and re-attach insurance for billing teams
- When editing the insurance claim, do not enter “plan pay” amounts, place the retail amount in the “discount” column
- Take the sale you just completed to Xstore then Complete [No Receipt Return](#) in Xstore
- Tendering together should result in a zero-balance transaction
- Delete “staged” order in LPA from phantom transaction

### Orphaned and/or Phantom Order EyeMed Orders: NO EPP

- Call EyeMed to reinstate benefits
- Re-enter order in Ciao!, matching the original order attaching the original insurance and discounts included
- Take the sale you just completed to Xstore then Complete [No Receipt Return](#) in Xstore
- Tendering together should result in a zero-balance transaction
- Delete “staged” order in LPA from phantom transaction

### Orphaned and/or Phantom Order Other Orders: Non-Eyemed Insurance and No EPP

- DO NOT Complete no receipt return process
- Re-enter the order in Ciao and re-attach insurance for billing teams
- When editing the insurance claim, do not enter “plan pay” amounts, place the retail amount in the “discount” column
- Place the patient copays in the “copay” column
- In XStore, Select F3 Add Discount
- Use Discount Code 5540 (\$ Item) or 5542 (\$ Transaction) to discount patient copays
- Complete transaction
- Delete “staged” order in LPA from Phantom Order

# NO RECEIPT RETURN



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## No Receipt Return Instructions:

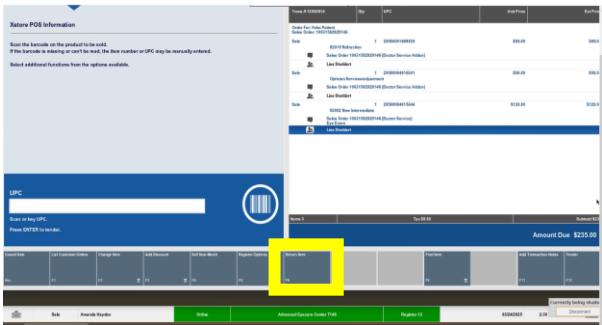
1. In Xstore, click **F6 Return Item**
2. Enter required patient information and save changes
3. Select **No** for the original receipt prompt
4. Enter the **Misc. Repair UPC** 410000225387
5. Enter Price, this will be the **Amount Due**, and select enter
6. Click **Yes** when the warning appears that the item is not in the purchase history
7. Select **Return** and click **OK**
8. Select **Payment Correction** (Tender/Insurance)
9. In the notes, write Phantom Order

Note, once completed, in certain states you will need to account for Tax Refunds.

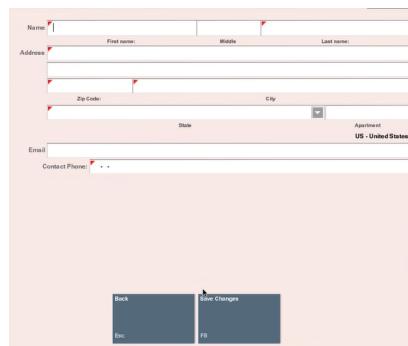
- F3- Change Item Tax
- F1- Tax Exempt
- Complete tax details

## Let's breakdown this process:

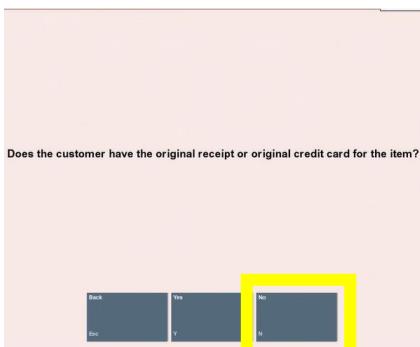
- 1 From Xstore, click F6 Return



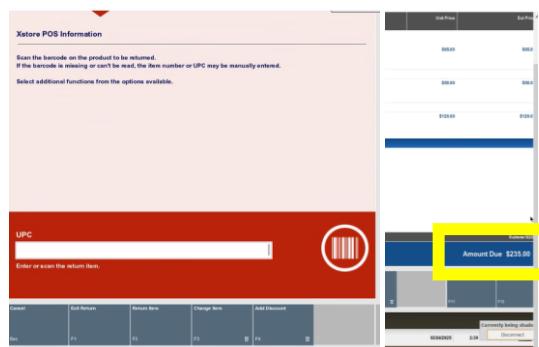
- 2 Enter patient details



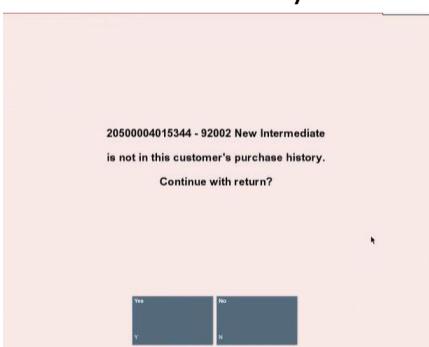
- 3 Select NO when prompted for original receipt



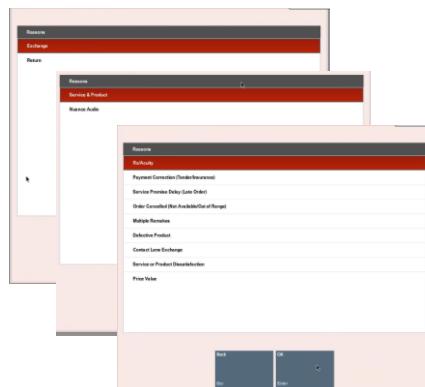
- 4 • Enter UPC: 410000225387 (Misc. Repair)  
• Enter Price (amount due)



- 5 Click Yes to acknowledge item not in history



- 6 Walk through exchange prompts



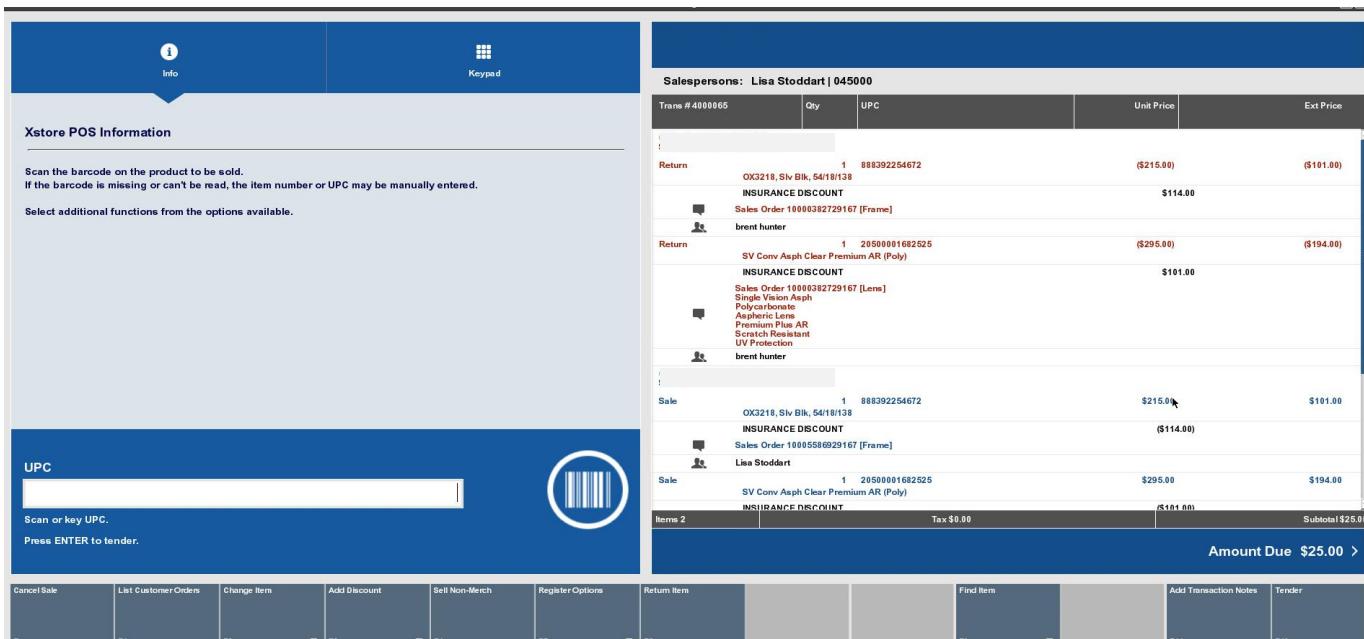
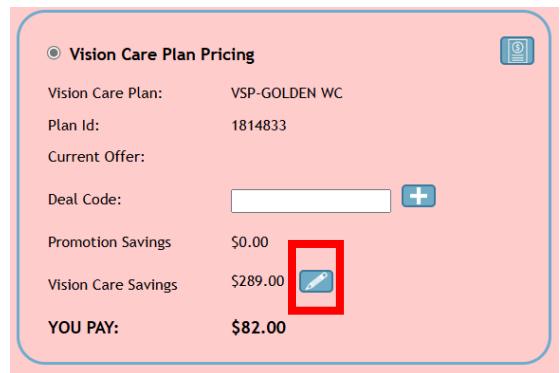


Click [HERE](#) to be redirected to the EPP Guide for additional details

1. Use the dropdown to select the type of EPP you're processing: **Lens Only, Frame Only, or Complete Pair** (see image on right).
2. **If insurance was used on the original sale**, always select **Complete Pair**, even if you're only exchanging the frame or lenses.
  - **Important:** If you select **Lens Only**, Ciao! will try to return the original **frame insurance funds**, which may result in an incorrect patient refund or system error.



3. You will not need to re-apply insurance benefits unless you edit/change the order from the original selection.
  3. If changes are made, edit the insurance worksheet.
4. When tendering in Xstore, you will see the original transaction in Red and the new one in Blue.
5. Confirm the correct total is listed in the Amount Due box.
  - If not, likely you did not select a complete pair (pink image above) or the system has changed/dropped the patient copays, plan pays, and discount amounts.
  - Cancel the sale and edit your transaction from the Active Orders List to make needed corrections.
  - Do not use manager discretion codes to discount-edit and correct the insurance worksheet.





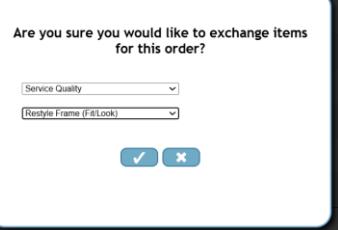
## Difference due to TeamVision Assortment & Price Changes (Frames or Lenses)

You will follow this process for EPP redemption and product exchanges when there have been a change in our TeamVision pricing (frame or lens).

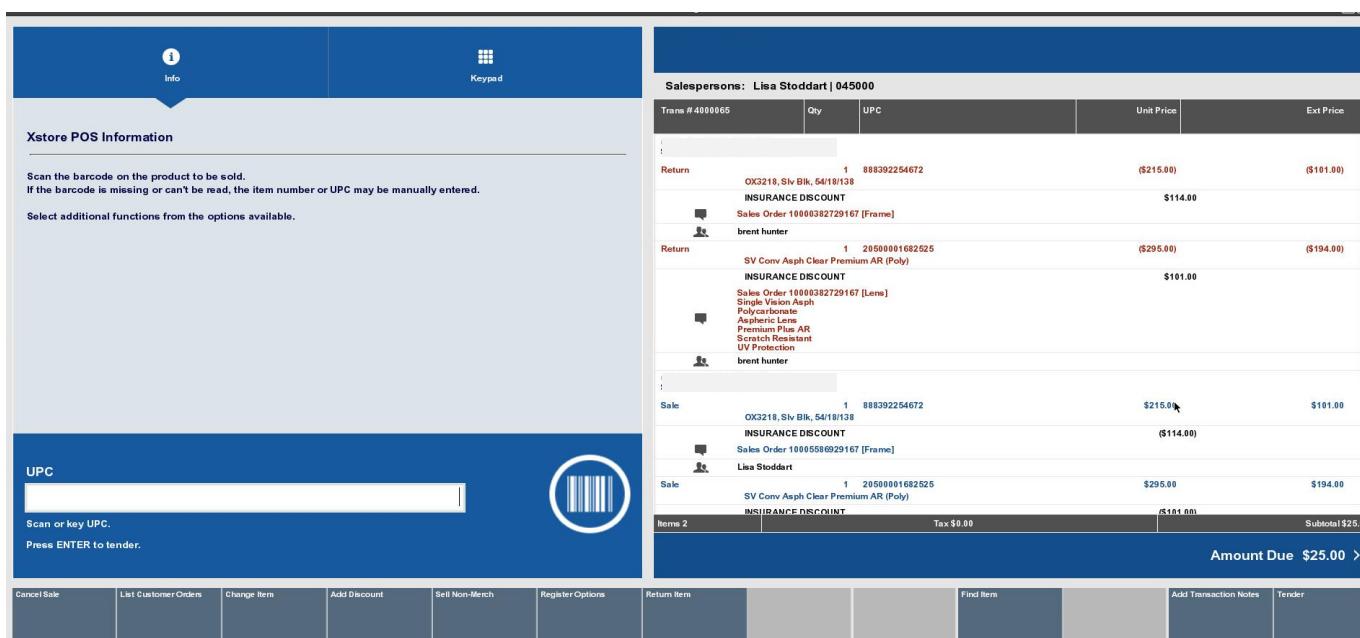
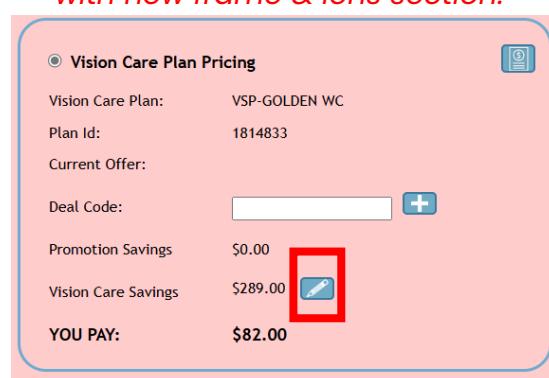
1. Process a service exchange and indicate if exchange reason.
2. If complete pair was originally sold, you will select complete pair icon at exchange (see image in pink below)
  - Note: it is okay to select Lens EPP for the EPP dropdown, however select complete pair when walking through the transaction.



3. Select new frame and/or lens options
4. Edit the insurance worksheet, updating the plan pays, discounts, and copay columns as needed
5. When tendering in Xstore, you will see the original transaction in Red and the new one in Blue
6. Confirm the correct total is listed in the Amount Due box.
  - If not, identify why it came out incorrect. Is the Insurance Worksheet incorrect (plan pays, discounts, copays) **OR** is there a balance due from a lens/price increase.
  - *Lens & Price increases are not patient responsibility, so you will use a discount code and reduce down to EPP copay.*
7. Add patient to **Additional Info Sheet** so biller does not bill a second time.



*Click the pencil to update the plan pays, discounts, and patient copays with new frame & lens section.*





## Tax ID Change- Legacy Locations Only

Due to backend updates for the new Tax ID, exchanges on EyeMed insurance orders with a service date before the transition are causing an 'Internal Server Error>Provider Address does not exist' in Ciao! Optical.

Follow the instructions below on handling exchanges with 'Provider Address Does Not Exist' Error.

<b>Quality or RX Change (No Money Owed by Patient or Insurance)</b>	<ul style="list-style-type: none"><li>Enter new private pay order and discount down to \$0.</li><li>Note in Ciao! Optical that this is a remake of original order #XXXX prior to the TIN transition.</li><li>No claim correction needed.</li></ul>
<b>Service, Restyle, EPP (Money Owed by Patient or Insurance)</b>	<ul style="list-style-type: none"><li>Enter new private pay order and discount down to the correct amount owed.</li><li>Note in Ciao! Optical that this is a remake of original order #XXXX prior to the TIN transition.</li><li>Submit paper claim correction to EyeMed through <a href="#">this link</a> with the original DOS and old TIN.</li><li>Use Exclaim or contact the EyeMed Call Center at (866) 939-3633 for assistance with pricing and claim corrections.</li></ul>
<b>Service, Restyle (Refund Due to Patient)</b>	<ul style="list-style-type: none"><li>Enter new private pay order and discount down to \$0.</li><li>Make notes in patient profile that new order is remake of original order #XXXX prior to TIN transition.</li><li>Enter a "No Receipt Return" transaction using the original transaction information and adjust the price to reflect the correct refund amount.</li></ul>

# CO MANAGEMENT



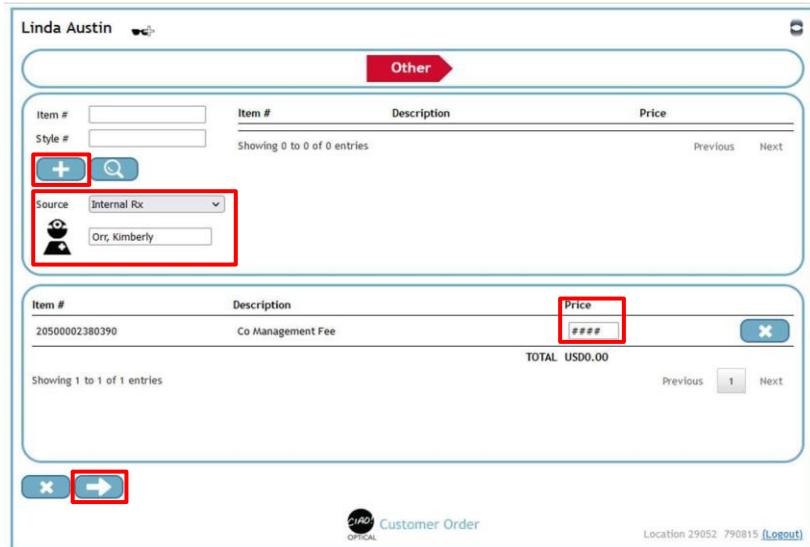
Co Management will reflect on sales reports and OD productivity just like accessories and other wellness. Therefore, it is **VERY IMPORTANT** that the **Source** and **Doctor** is selected in Customer Order prior to tendering the sale.

Use the **Co Management Fee UPC** when entering Co Management payments in Ciao! Optical:

1 Enter UPC **20500002380390**

2 Then select the **Source**:

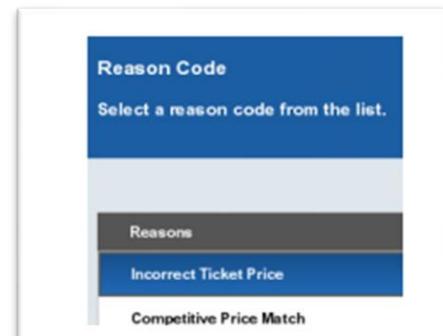
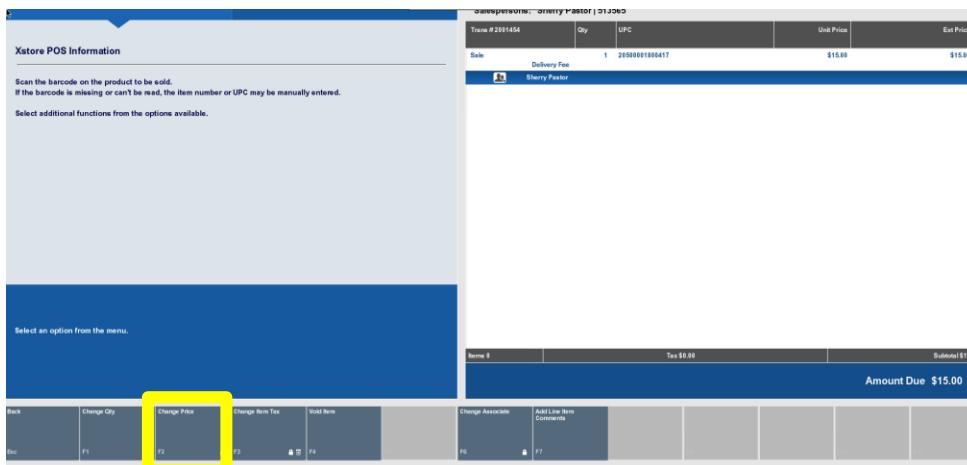
- Internal
- Select the correct Doctor from the drop down
- Enter the price and select the arrow to proceed to Active Order List



3 Select the Ciao! button to **Tender**

4 In Xstore (tendering screen)- for items that were manually priced, you will need to re-enter the price in Xstore

- **Click F3- Change Item**
- Highlight sale on right side of screen
- Click Enter on keyboard
- **Click F2-Change Price and enter price**
- When prompted-choose reason code **Incorrect Ticket Price**



# FINIX CREDIT CARD PROCESSOR



**New Sites:** During Integration week:

- Ops Manager will set up and test your device.
- You will receive training on how to use the terminal and Dashboard.
- [Click HERE](#) to be redirected to the Finix Website for How-To Guides.

**Your Finix Credit Card terminal should come with:**

Power Adapter



Ethernet Communications Box



PAX A800 Credit  
Card Device



**Locating Serial Numbers:**





Should Stax replace your device due to technical issues, below overviews the set up and activation process.

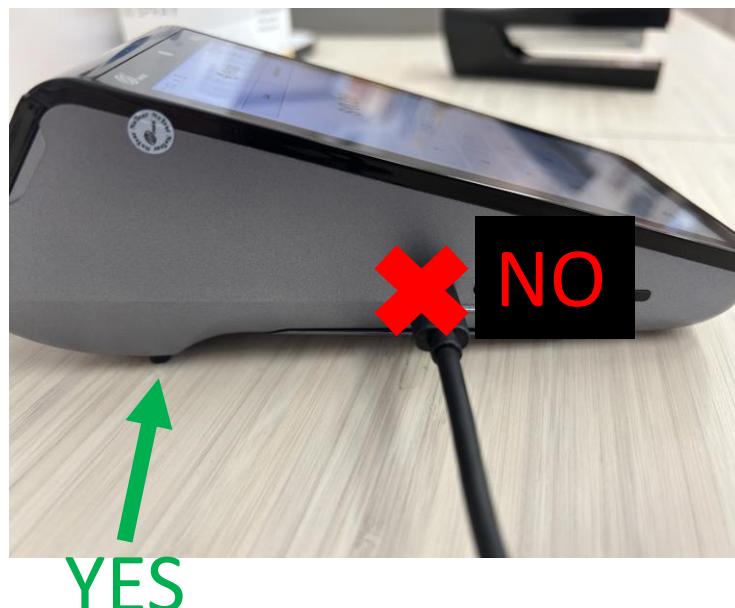
1

Plug the Power adapter into the Ethernet Comm Box. Remove the ethernet cable from your current Stax Credit Card Device (if applicable) and plug into the Ethernet Comm Box. The cables are device-specific. Please ensure the cable is plugged into the device it was boxed with.



2

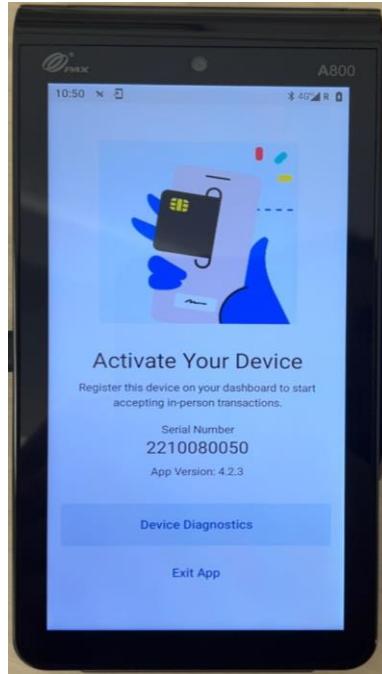
Plug the Ethernet Comm Box into the BOTTOM of the PAX A800 Credit Card Device.





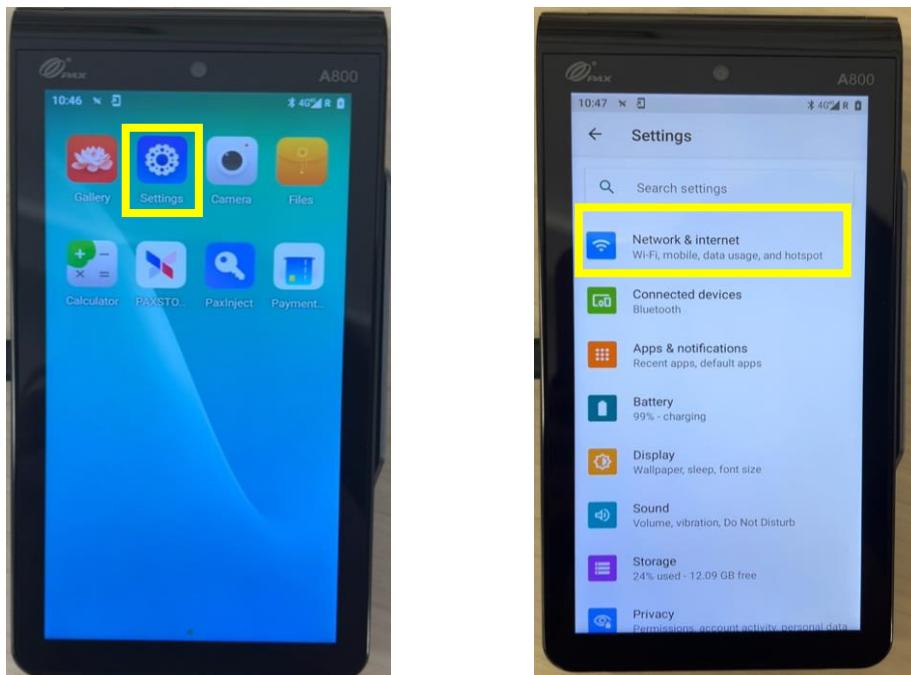
3

Power on the Device. You should see “Activate Your Device” along with the Serial Number. The Operations Manager will activate the device live from the online dashboard.



4

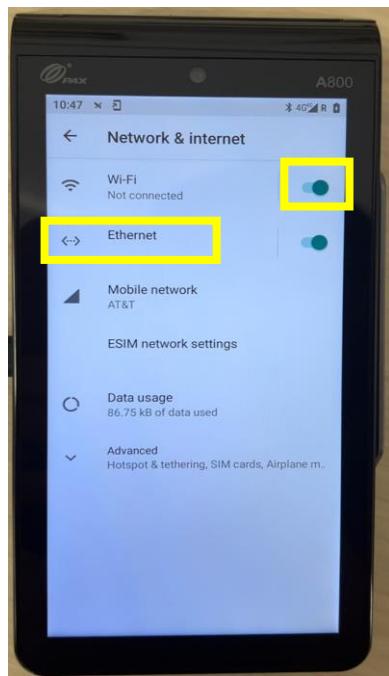
Once the Operations Manager has activated the device, open the “Settings” App. Then tap “Network & Internet”.





5

Tap the green bubble to TURN OFF WI-FI. Confirm that Ethernet is active.



6

- Disable e-Sim Settings. Note-The devices operate only on Wifi or Ethernet connectivity please verify that cellular eSim is disabled.
- Access the Settings Menu:
  1. Tap the "Settings" app (usually represented by a gear icon).
  2. Navigate to SIM Settings
  3. In the Settings menu, scroll and tap on "Network & Internet"
  4. Open ESIM Network Settings
  5. Toggle off eSIM Card option
  6. Return to Network & Internet and tap on "Advanced"
  7. Tap on "SIM cards"
  8. Disable the SIM
  9. Toggle off all the sim slots. ie "SIM slot 1" and "SIM slot 2".

7

Your device is now ready to process a test transaction.

# UPDATE PAYMENT APP



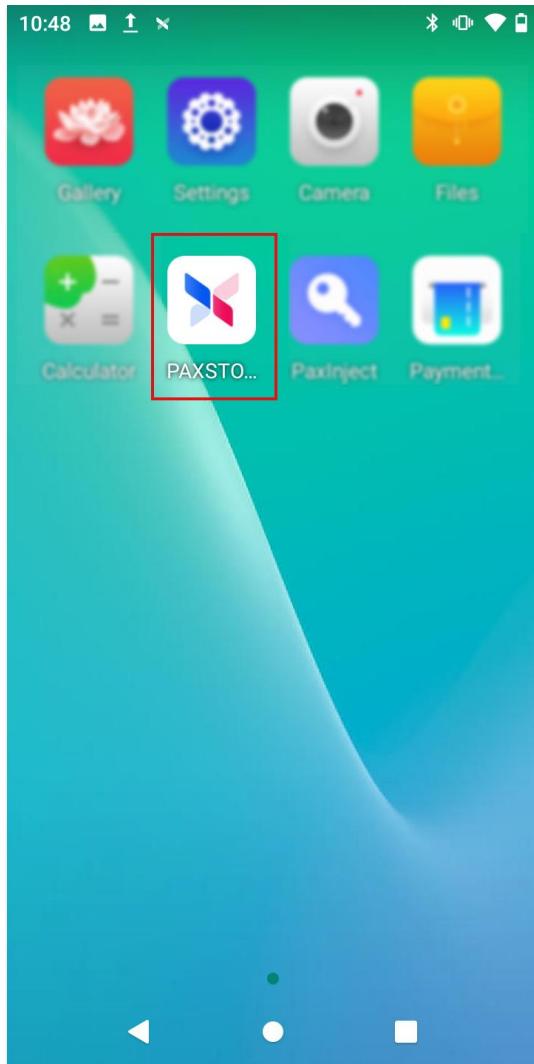
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As of 6/25/25, all devices need to be on version 5.6.0 or later. Recent updates include the addition of the "Transaction Summary Report" for end of day card brand totals.

Follow the instructions below to update your payment app.

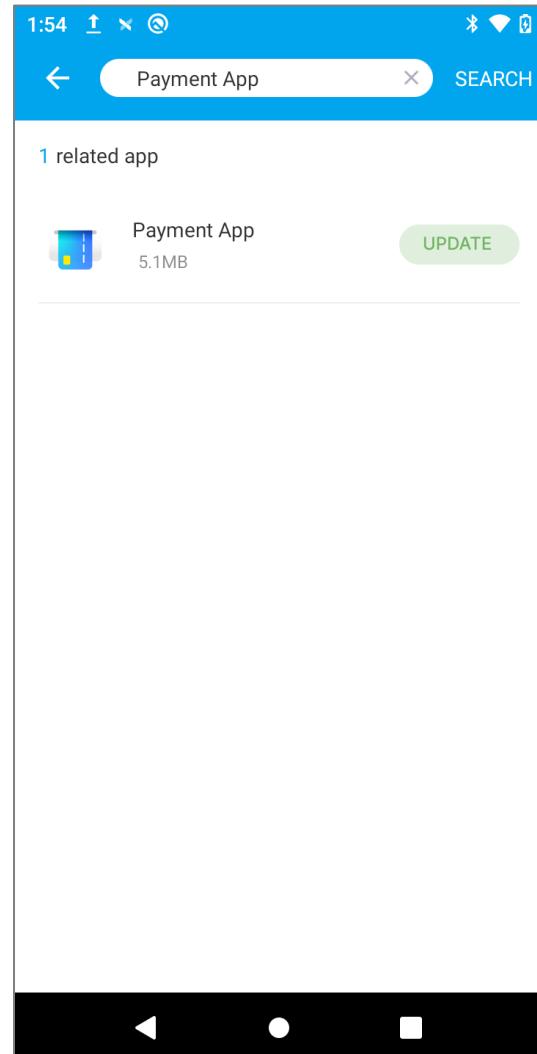
1

Navigate to the PAXSTORE App on your terminal.



2

Search for "Payment App" and click "Update".



# PROCESSING A TRANSACTION



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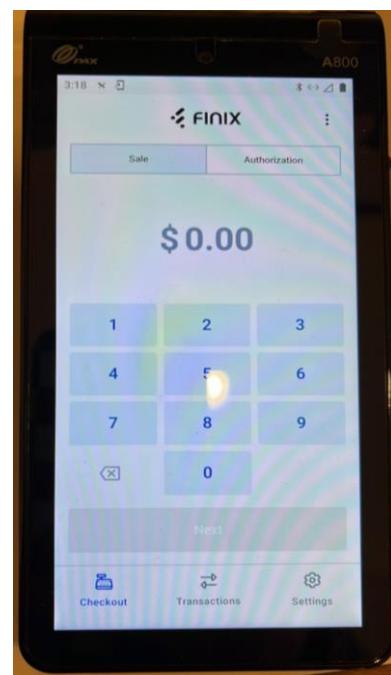
1

From the Home Screen,  
Open the "Payment"  
application.



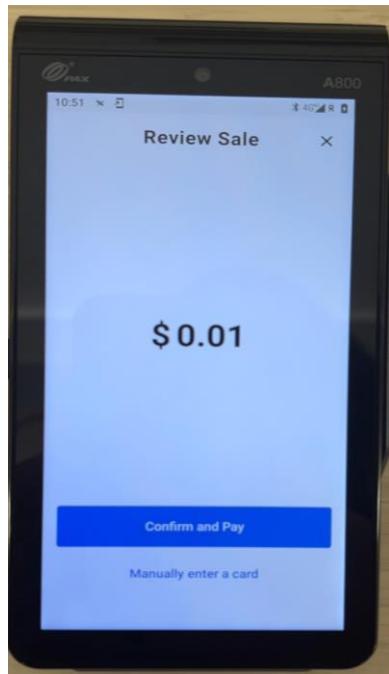
2

Confirm "SALE" is selected,  
type in the desired dollar  
amount, then click "Next".



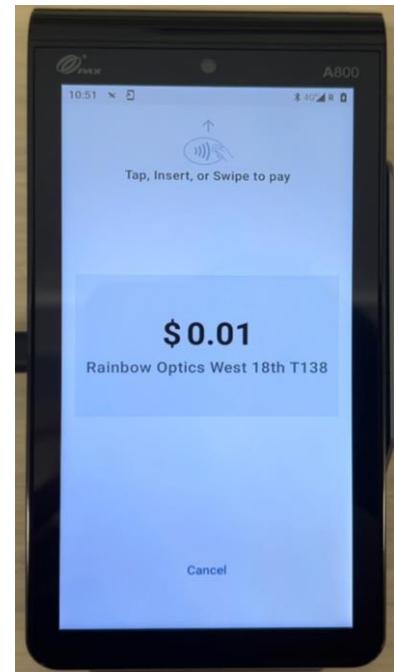
3

"Confirm and Pay" or "Manually enter a  
card" for phone payments.\*



4

Tap, Insert, or Swipe Card.



\*Please note there is a higher transaction fee  
associated with manually entered card  
payments. Please do not use this option  
unless necessary.

# PROCESSING A TRANSACTION

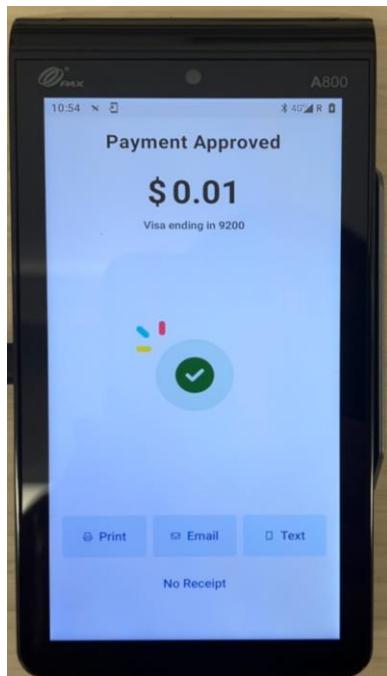


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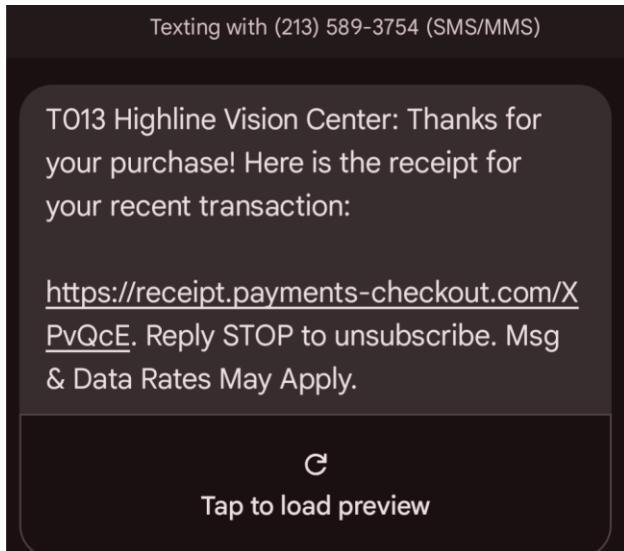
5

Select preferred patient receipt type (print, email, text).

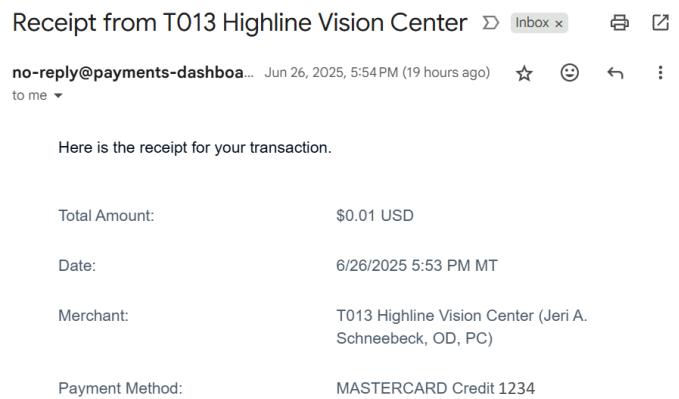
- NOTE: ALWAYS print the merchant receipt to staple to your Ciao! Receipt for daily closing reconciliation.



## TEXT EXAMPLE



## EMAIL EXAMPLE



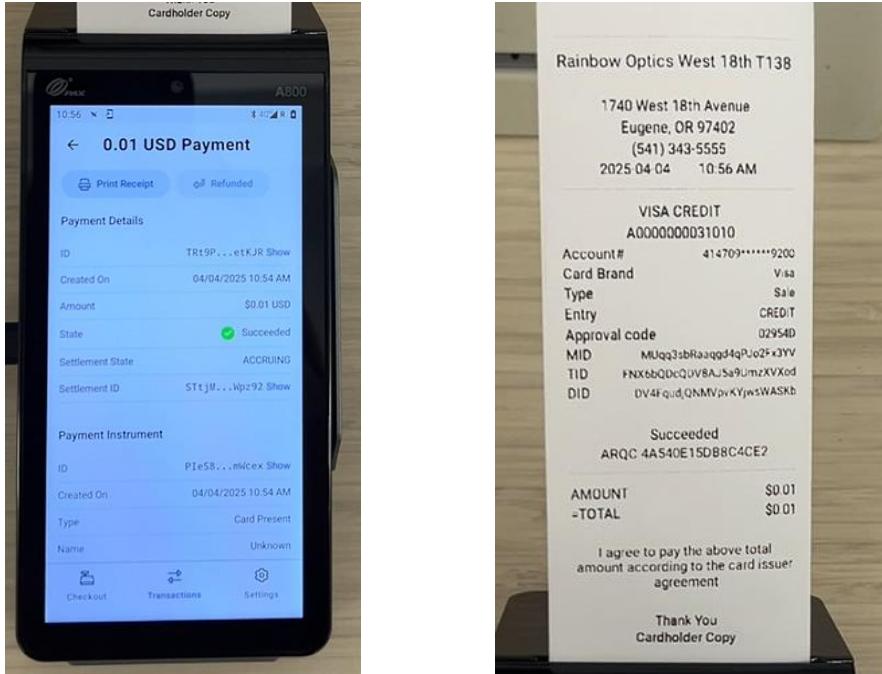
# PROCESSING A TRANSACTION



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6

Confirmation page will appear, and receipt will print.



# PROCESSING AN UNREFERENCED REFUND



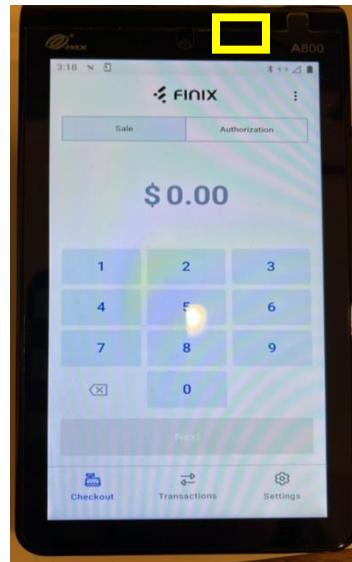
RETURN TO TABLE  
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In rare situations, you may need to process a refund for a transaction that was not originally completed on the Finix Credit Card Terminal. This is referred to as an unreferenced refund. Common examples include:

- The original transaction was processed on a Stax device.
- The original form of payment is no longer available (e.g., card expired, lost, or stolen).

**IMPORTANT:** The card you are refunding to **must be present** to issue an unreferenced refund. No manual entry is allowed.

- 1 From the payment screen, Tap the 3 dots in the upper right corner, then select "Create Refund"
- 2 Type in the desired refund amount.
- 3 Select "Create Refund"
- 4 Tap, Insert, or Swipe Card for refund.



If you encounter errors or issues when attempting an unreferenced refund, please email [support@finix.com](mailto:support@finix.com) and CC [TVOps@teamvisionteam.com](mailto:TVOps@teamvisionteam.com). The support team will investigate and provide guidance. Please include:

- Site number
- Transaction ID
- Last 4 of the card
- Time and date of attempted refund
- Amount

If the refund still cannot be processed, you will need to attempt the refund to a different card or issue the refund via a Home Office check. Please note, these situations are typically due to restrictions from the card issuer, not a system error.

# VIEWING & REPRINTING PRIOR TRANSACTION

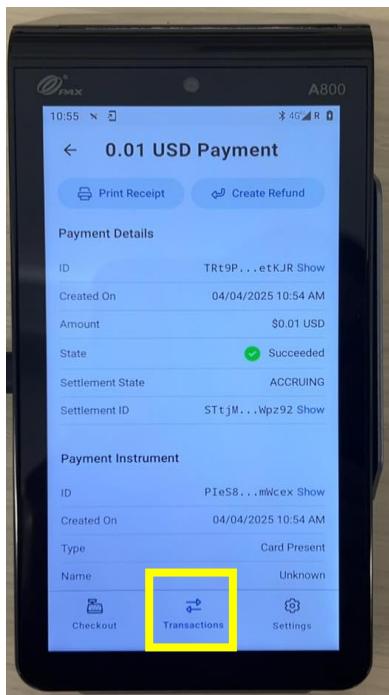


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All transactions processed on any device and the online dashboard are viewable from every device. All devices communicate with each other and the online dashboard, making data consistent no matter which device you use to view transactions.

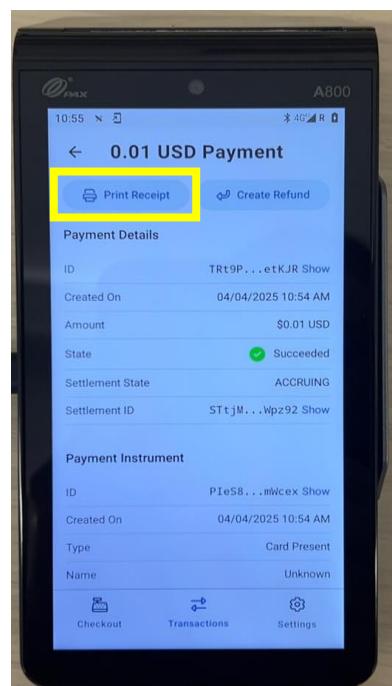
1

From the Payments App, select “Transactions” from the bottom of the screen. Please note that refunds and sales are housed in two different screens. Tap the appropriate payment type at the top to find your transaction.



2

Scroll to search for the desired transaction. To re-print the receipt, tap “Print Receipt”.



# END OF DAY CLOSING REPORT



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Finix devices will **auto-batch** at the end of each night. No action is necessary to close out your device. To gain access to the totals by card brand for end of day closing procedures in Ciao! Optical, you will view the “Transaction Summary Report” directly on your Finix Credit Card Terminal. Directions below.

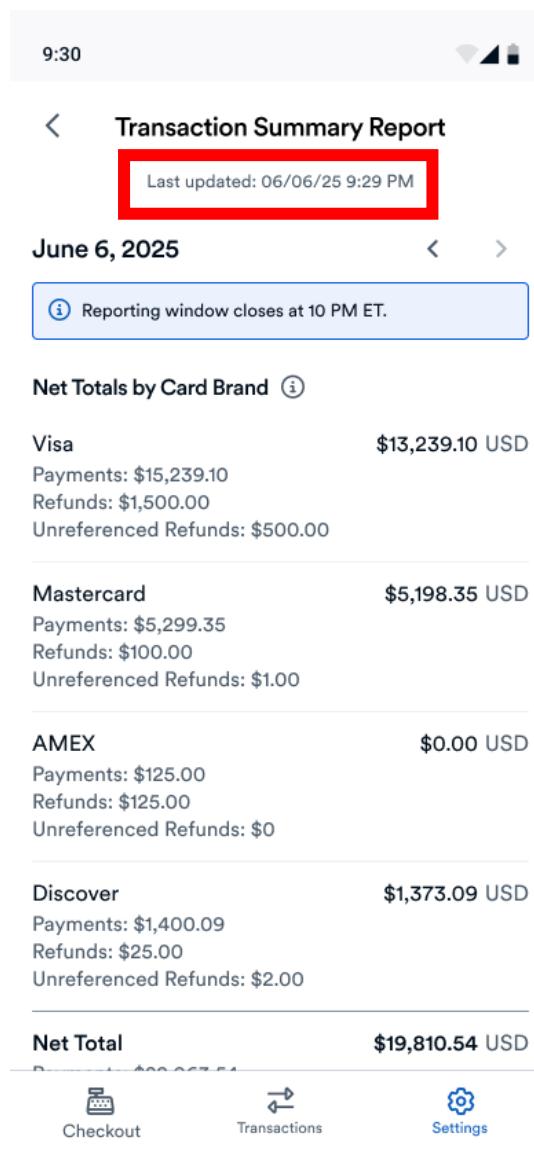
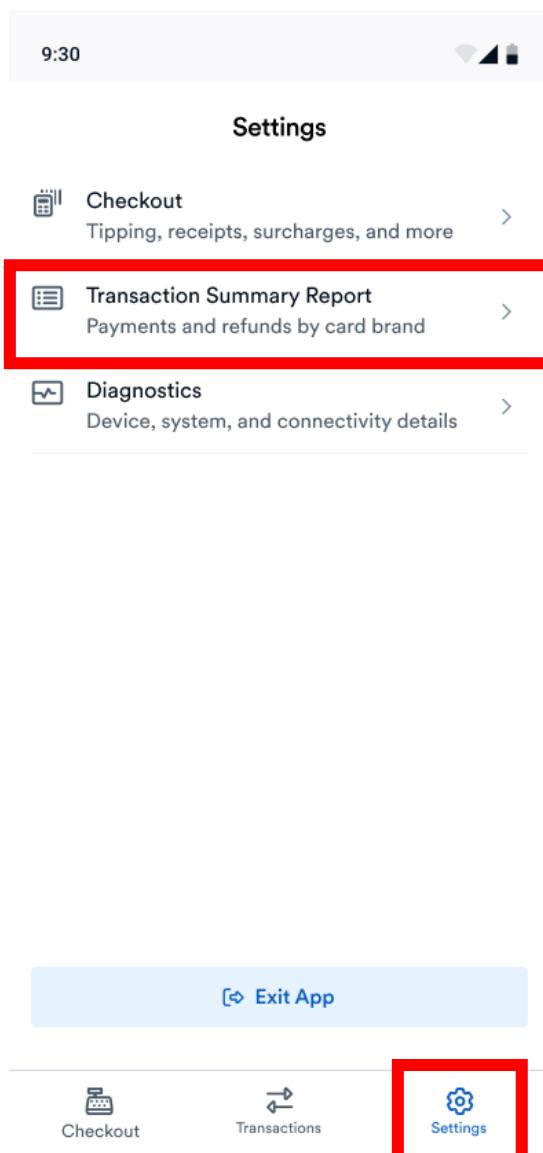
NOTE: You must be on Payment App version 5.6.0 or later to access this report. To update your payment app, follow the instructions [HERE](#). All terminals are connected, so you will see the same information on every terminal in your office.



From the payment screen, Tap “Settings” then “Transaction Summary Report”.



At the top, you will see the date and time of the last update. Confirm that you have not processed any transactions after the reported time.



# END OF DAY CLOSING REPORT



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3

The amount listed in **BOLD** next to each card brand is the amount you will enter in Ciao! Optical for your closing report.

9:30

Transaction Summary Report

Last updated: 06/06/25 9:29 PM

June 6, 2025

Reporting window closes at 10 PM ET.

Net Totals by Card Brand	
Visa	<b>\$13,239.10 USD</b>
Payments:	\$15,239.10
Refunds:	\$1,500.00
Unreferenced Refunds:	\$500.00
Mastercard	<b>\$5,198.35 USD</b>
Payments:	\$5,299.35
Refunds:	\$100.00
Unreferenced Refunds:	\$1.00
AMEX	<b>\$0.00 USD</b>
Payments:	\$125.00
Refunds:	\$125.00
Unreferenced Refunds:	\$0
Discover	<b>\$1,373.09 USD</b>
Payments:	\$1,400.09
Refunds:	\$25.00
Unreferenced Refunds:	\$2.00
<b>Net Total</b>	<b>\$19,810.54 USD</b>

Checkout    Transactions    Settings

4

To view a previous day's totals, toggle using the small arrow next to the date.

9:30

Transaction Summary Report

Last updated: 06/06/25 9:29 PM

June 6, 2025

Reporting window closes at 10 PM ET.

Net Totals by Card Brand	
Visa	<b>\$13,239.10 USD</b>
Payments:	\$15,239.10
Refunds:	\$1,500.00
Unreferenced Refunds:	\$500.00
Mastercard	<b>\$5,198.35 USD</b>
Payments:	\$5,299.35
Refunds:	\$100.00
Unreferenced Refunds:	\$1.00
AMEX	<b>\$0.00 USD</b>
Payments:	\$125.00
Refunds:	\$125.00
Unreferenced Refunds:	\$0
Discover	<b>\$1,373.09 USD</b>
Payments:	\$1,400.09
Refunds:	\$25.00
Unreferenced Refunds:	\$2.00
<b>Net Total</b>	<b>\$19,810.54 USD</b>

Checkout    Transactions    Settings

**NOTE: This report is currently NOT ABLE TO PRINT. You must view on the device and manually record the numbers in your Ciao closing process.**



Finix Dashboard is an online platform that allows you to search and reconcile transactions, review and respond to disputes, issue refunds from a previous business day, and process online payments if your physical terminal ever goes down.

**Setting up your login:** An activation email will be sent to the site shared mailbox and the Manager mailbox for initial login. If additional logins are necessary, please contact [tvops@teamvisionteam.com](mailto:tvops@teamvisionteam.com) with [kworley@luxotticaretail.com](mailto:kworley@luxotticaretail.com) on CC.

**Daily Login:** Access the Finix Dashboard [HERE](#). Multi-factor authentication is required—employees will be prompted to use a phone number for text or download an authenticator app.

Visit the links below to learn more about how to use your dashboard:

- [Transaction Insights](#) – At-a-glance overview of key performance metrics
- [Managing Disputes](#) – Learn how to manage and respond to disputes from your online dashboard
- [Virtual Terminal](#) – Use this if in-store payment devices go down during business hours
- [Troubleshooting Your Terminal](#) – Common issues that can arise with payment terminals



**Will my Transaction Express/Patient Statement Payments process change?** No. Finix is only replacing Stax for in-office payments at the time of service. Any other payment methods or portals will remain the same.

## Does my Finix device accept Tap To Pay?

Yes, the devices are tap compatible. However, some forms of payment that cannot be verified (i.e. certain card types through Apple Pay) may be declined.

## How do I process refunds for transactions taken on my previous Stax device?

You can process what is called an unreferenced return through your payment screen on the Finix device ([Slide 12](#)). The card MUST be present to process an unreferenced refund. You cannot type a card number in. If you experience issues, please email TVOps and [support@finix.com](mailto:support@finix.com) with your Site ID, card type, last four, time of transaction and amount of refund.

## How do I reconcile at the end of the day?

Use the “Transaction Summary Report” on your device ([Slide 16](#)). You can also use the “Payments > Transactions” Tab in the Dashboard to view all transactions and manually reconcile.

## I forgot my password for the Finix Dashboard.

You can reset your password through the self-service “Forgot Password” reset link on the login screen.

## I'm experiencing connectivity issues with my device.

- See [this article](#) if you're having connectivity issues.
- Try switching the black C-cables (terminal ↔ Pax box, Pax box ↔ outlet).
- Ensure the power cord is plugged into the bottom of the terminal, not the side.
- When contacting support, always provide the Serial number from the bottom of your Pax A800 credit card terminal.



## How do I add new users to the Finix Dashboard?

We are working closely with the Finix team to update permissions and allow Practice Managers to manage users. In the interim, each location should have access to the dashboard through their Site and Manager shared email accounts. If a specific individual needs separate access, please email [TVOps@teamvisionteam.com](mailto:TVOps@teamvisionteam.com) with Katie Worley ([kworley@luxotticaretail.com](mailto:kworley@luxotticaretail.com)) on CC.

## Manual Card Entry:

Manual entry is strongly discouraged unless necessary. It results in higher fees and a greater risk of failed payments and chargebacks. Manually record the last 4 digits of the card on the receipt after it prints.

## Do I need to batch out my devices at the end of each night?

No, your devices will automatically batch at the end of each business day. All prior transactions will still be viewable on the device, so be aware of transaction dates when reconciling. Finix is a live processor, so everything happens in real time.

## SUPPORT

Email [support@finix.com](mailto:support@finix.com) for basic inquiries and general support.

Provide a clear description of the issue in the email's subject line and include as many details as possible (links, pictures, videos, code snippets, etc.). If you'd prefer to speak over the phone, include your phone number and what times work best in your email to [support@finix.com](mailto:support@finix.com).

# CLOSING CIAO! OPTICAL

# END OF DAY CHECKLIST



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System	Completed	Action
E.H.R.		<ul style="list-style-type: none"> <li>• Ensure all invoices are completed and that they have been transferred into Ciao! Optical</li> </ul>
		<ul style="list-style-type: none"> <li>• Eclips: Check out &amp; pre appoint next exam</li> </ul>
		<ul style="list-style-type: none"> <li>• RevolutionEHR: Run Unassigned Items Report and complete any patient's listed</li> </ul>
Order Management  (NOVG, LPA Order Tracker)		<ul style="list-style-type: none"> <li>• Ensure Tendered orders have been routed and Staged orders are deleted</li> </ul>
		<ul style="list-style-type: none"> <li>• Ship All Frames To Appropriate Labs</li> </ul>
		<ul style="list-style-type: none"> <li>• Place All Lab Tickets That Were "Completed" (Inspected) And Your Reconciliation Report In Your Daily Closing Envelope</li> </ul>
		<ul style="list-style-type: none"> <li>• Run and verify Lab Reconciliation Report</li> </ul>
		<ul style="list-style-type: none"> <li>• Ensure all Order Tickets for patients that picked up today are Dispensed in Order Tracker</li> </ul>
		<ul style="list-style-type: none"> <li>• Confirm all trials &amp; specialty orders have been ordered</li> </ul>
		<ul style="list-style-type: none"> <li>• Batch out Credit Card Devices <ul style="list-style-type: none"> <li>• Finix: Revie Dashboard</li> </ul> </li> </ul>
Closing Ciao! Optical		<ul style="list-style-type: none"> <li>• Log into XStore Back Office <ul style="list-style-type: none"> <li>• Review (Print) <a href="#">Return Merchandise Report</a></li> <li>• Count the Till and enter all Cash/Check/Credit Card Amounts</li> </ul> </li> </ul>
		<ul style="list-style-type: none"> <li>• Reconcile your totals <ul style="list-style-type: none"> <li>• Research and correct any payment discrepancies</li> </ul> </li> </ul>
		<ul style="list-style-type: none"> <li>• Force Close Register</li> </ul>
		<ul style="list-style-type: none"> <li>• Close the Store</li> </ul>
		<ul style="list-style-type: none"> <li>• Complete Bank Log &amp; Deposit per company guidelines</li> </ul>

**All closing paperwork is saved for 90 days and then shredded.**

- This includes receipts, returns & exchange documents, lab & dispense tickets, etc.

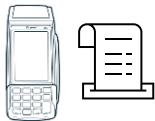
# END OF DAY CARD PROCESS



RETURN TO TABLE  
OF CONTENTS

## Finix Devices

### The Process



#### Batch Out:

- System will auto batch
- Print [Transaction Summary Report](#).

#### Dashboard:

- Login to [Finix Dashboard](#) for more transaction detail

[Click HERE](#) to be redirected to the Finix Website for How-To Guides

## Bank of America Devices

### The Process



#### Batch Out:

- Once you batch out, your credit card device will create a Sum by Card type for you

# RETURN MERCHANDISE REPORT



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OF CONTENTS

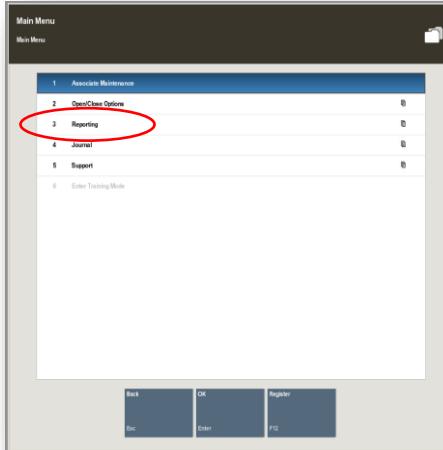
The Returned Merchandise Report is used for the Frame Recovery(damage) process. Daily, review and print the and place in the Frame Recovery Box. Overview of process:

1. **Print your Return Merchandise Report** for last week from Back Office following the steps below.
2. **Highlight** the frames that should be recovered.
3. **Inspect** your Frame Recovery Box to see if the frames or paperwork are in the box.
4. **Follow the** Damage Process

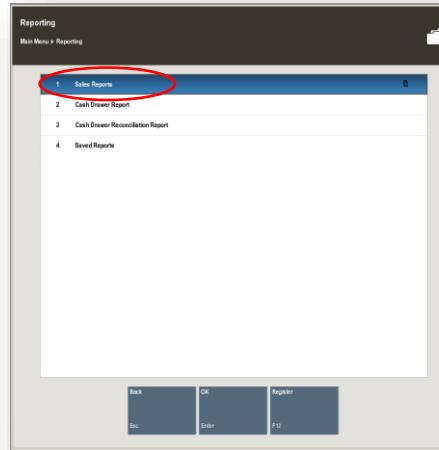
Returned Merchandise Report								
Date Range: 12/01/2020 - 12/30/2020			Reason: ALL		Sort Order: Date & Time Ascending			
Trans. ID	Reg. ID	Date & Time	Comm. / Asses.	Ring Associate	Item # & Description	Qty		
1072123	1	12/03/20 1:18 PM	745173	757680	205000000348897 - Standard AR Add S15	1.00	\$36.12	\$36.12 Lens EPP
1072123	1	12/03/20 7:45:17	757680	205000000348263 - PG-AVP Transactions GEN	1.00	\$347.85	\$347.85 Lens EPP	
1072128	0	12/03/20 8:49 PM	719882	2050000003110449 - PG- Chime Essential	1.00	\$138.67	\$138.67 Reversible Lens or Frame	
1072130	3	12/03/20 8:57 PM	430934	430934	205000000353208 - PG-AVP Fees Classic:	1.00	\$322.87	\$322.87 Lens EPP
4013637	4	12/04/20 11:05 AM	038163	039371	205000000333208 - PG-AVP Fees Classic:	1.00	\$412.01	\$412.01 New Rx
1072150	1	12/04/20 1:17:15 PM	759882	759882	205000000678030 - PG-AVP Fees Classic: Blue	1.00	\$359.08	\$359.08 Lens Coat or Material Change
1072157	2	12/04/20 7:48:19	740190	758982	80538721517521 - AX1018: Bif. Mat.	1.00	\$31.66	\$31.66 Complete EPP
1072157	1	12/04/20 7:48:19 PM	740190	758982	Clear Frame 11805 - SIV Fee Classic: Blue (2)	1.00	\$97.54	\$97.54 Complete EPP
1072189	1	12/05/20 2:39 PM	430934	038163	20500000073030 - PG-AVP Fees Classic: Blue	1.00	\$359.01	\$359.01 OC-PO-Seg Correction
1072184	1	12/05/20 3:18 PM	737680	338143	205000000327128 - DK (Reversible Lens or Frame) (2)	1.00	\$460.00	\$460.00 Reversible Frame to Rx
1072184	1	12/05/20 3:18 PM	737680	038163	18104147508 - OC-230048: Bif. CH	1.00	\$45.00	\$45.00 Reversible Frame to Rx

Click [HERE](#) to access the Inventory Management Guide for additional details.

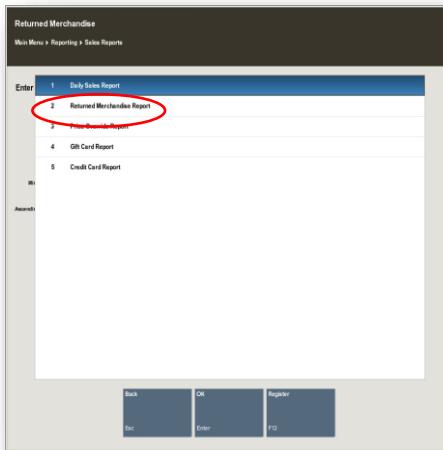
- 1 From Ciao! Back Office, select  
3- Reporting



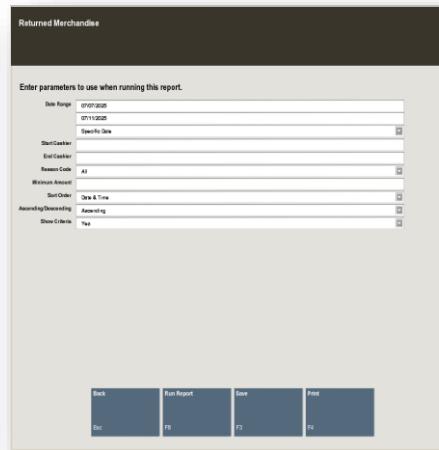
- 2 Select 1- Sales Report



- 3 Select 2- Returned Merchandise Report



- 4 Enter Date Range





**The closing process has been updated to allow you to better reconcile your daily funds.** Do not close Ciao! Optical until all patient interactions have been completed & tendered (this includes browsing patients)

- Once you Force close you will prevent all iPads & desktops from accessing Ciao!
- You must open and close on Register 1

## Let's breakdown this process:

1

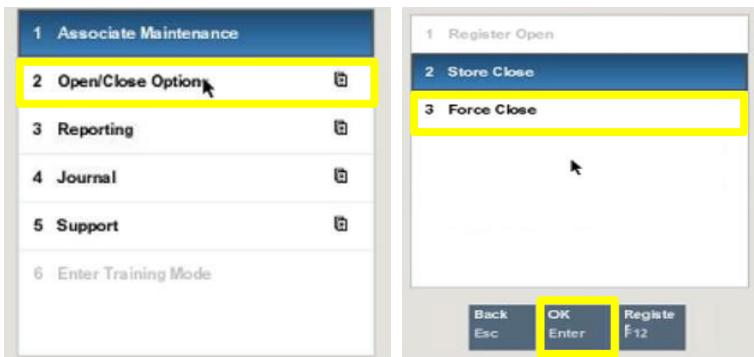
- Confirm all team members do not need access to Ciao! Optical
- Exit the Ciao! Application on Register 1 and **Relaunch** (this will help pick up any "just tendered" transactions)
- Using EL Network credentials, **Login** to the back office and click **Ok** to bypass the non-home office prompt



2

### Select:

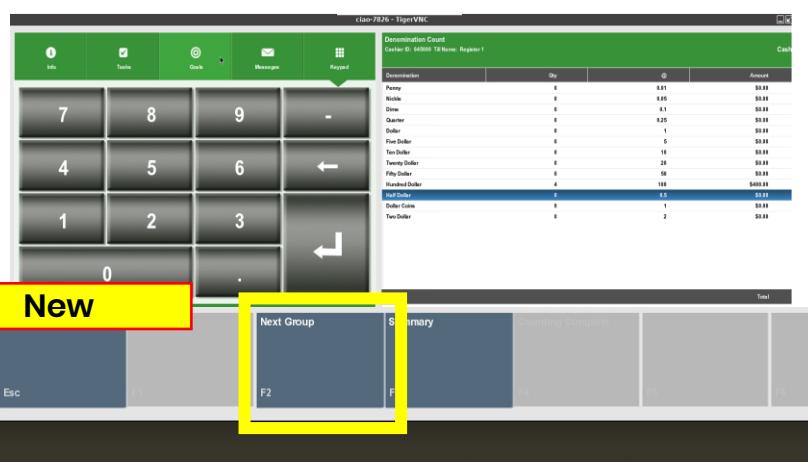
- 2: Open/Close Options**
- 3: Force Close and OK**
- Click **Yes**, to confirm you'd like to close the register
- Note- you can back out at any time if you need to assist a patient



3

### Complete **Till Count** by denomination

- Note-Some sites may have a department store prompt prior to your cash funds, click F2 to bypass
- You should keep a float of \$400
- Once all cash funds have been entered, **Click F2- Next group**



4

### Using your **Sum by Card Type or Transaction Summary Report** from your credit card device, enter all applicable **Tender Types**:

- Amex, Debit, Discover, Mastercard, Visa, Care Credit, Check**
- Note- if a patient wants to use a debit card it is recommended to tender as the card type (Visa, MC) vs. Debit Card

*The following Tender Types will not need to be entered by the site (back-end reconciliation) or rarely/never accepted at the site:*

- Department Store, COD (Canada only), ATH, Travelers Checks, Assignment, Managed Care, Medical Bill, Safety, Safety Tax*

5

Once all tender types have been entered, review your summary for accuracy by comparing the **Declared Amounts Column** to the **System Column**

- **Confirm the declared amount column and system column match for:** Cash, Checks, Amex, Debit Card, Discover, Master Card, Visa, Care Credit
- The following Tender Types you will only have funds listed in the System column: COD (Canada only), Assignment Vision Care, Managed Vision Care, Medical Billing, Safety

V2 a00096561:0 - VNC Viewer

Count Group	Declared	System	OverShort
Department Store	\$0.00	\$0.00	\$0.00
Cash	\$400.00	\$400.00	\$0.00
COD	\$0.00	\$0.00	\$0.00
American Express	\$0.00	\$0.00	\$0.00
Debit Card	\$0.00	\$0.00	\$0.00
Discover	\$0.00	\$0.00	\$0.00
MasterCard	\$0.00	\$0.00	\$0.00
Visa	\$0.00	\$0.00	\$0.00
ATH Card	\$0.00	\$0.00	\$0.00
CareCredit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
Check	\$0.00	\$0.00	\$0.00
Assignment Vision Care	\$0.00	\$0.00	\$0.00
Managed Vision Care	\$0.00	\$0.00	\$0.00
Medical Billing	\$0.00	\$0.00	\$0.00
Safety	\$0.00	\$0.00	\$0.00
Safety Tax	\$0.00	\$0.00	\$0.00

**Count Summary**  
Select a tender to count or select an option from the menu.

Cancel Count Selected Count Complete Esc F1 F2

The amounts you just entered by tender type through the closing process.

The amounts entered at patient tender, added up.

6

- **Discrepancy found:** If the amounts do not match, you will need to research the discrepancy before you can close for the day.
  - Print a detailed report from the credit card device
  - Compare the report with electronic journal in Back Office screen in XStore
  - Review paperwork and receipts for the day
  - Correct the error needed based on scenario (phantom order, incorrect charge/tender, etc.)
    - Note- if you can not get ahold of the patient that day to correct the error, close with a variance and note on the closing screen in ciao!, on the DCR, and email [Salesaudit1@luxotticaretail.com](mailto:Salesaudit1@luxotticaretail.com) (print a copy and place in the DCR).
    - On the day you correct the error, send a follow up email to sales audit and again print and place in DCR
- **Balanced: You can proceed with closing the system.**
  - Click F2 Counting Complete

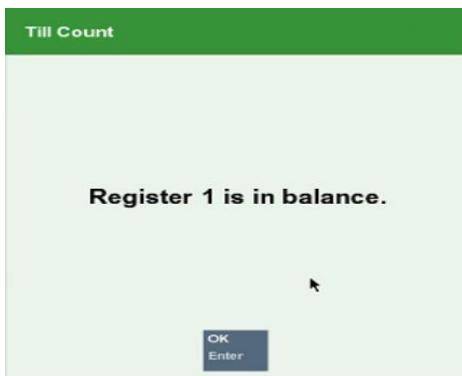


## Example Scenarios

Examples	Action
Ciao! Master Card Total= \$1000 Credit Card Device for MC= \$1300	<ul style="list-style-type: none"> <li>Review your Active Orders and Virtual tab to identify any patients that we forgot to tender in Ciao!</li> <li>Review back-office electronic journal for “orphaned” orders (the word orphaned under status)</li> <li>Might be a correction from a previous issue (if so, partner with PM and note accordingly and email sales audit)</li> </ul>
Ciao! Master Card Total = \$1600 Credit Card Device for MC= \$1300	<ul style="list-style-type: none"> <li>Review your back-office electronic journal to identify the patient that was tendered in Ciao! but not on the credit card device</li> <li>Reach out to the patient to collect payment</li> <li>If closing with a variance, notate why and email sales audit (Salesaudit1@luxotticaretail.com)</li> </ul>
Phantom Order (Gray Pencil)	<ul style="list-style-type: none"> <li>If the electronic journal shows as “completed” but the order is showing on the “active orders tab” you will need to complete a no receipt return</li> <li><a href="#">Click Here</a> for the Phantom Orders Guide (not based upon insurance carrier there are different actions)</li> </ul>

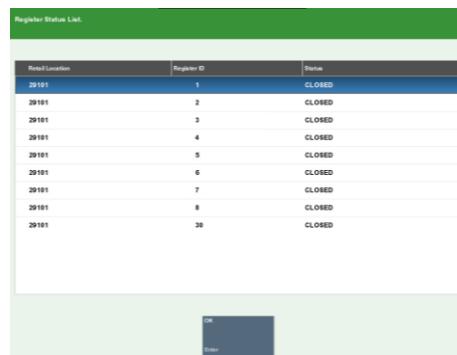
7 When the amounts match, you will receive a prompt to confirm the register is in balance.

- If making a deposit, the deposit amount will be listed



8 You will also receive confirmation that all other registers have closed and the register number on the bottom of your screen should now be red

- Site name/number will be in green
- Click Ok to proceed on

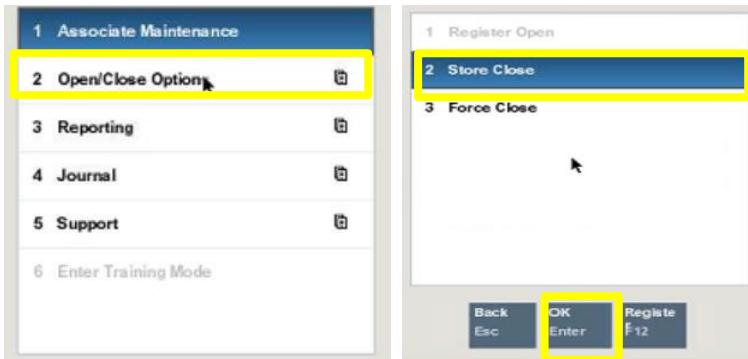




9

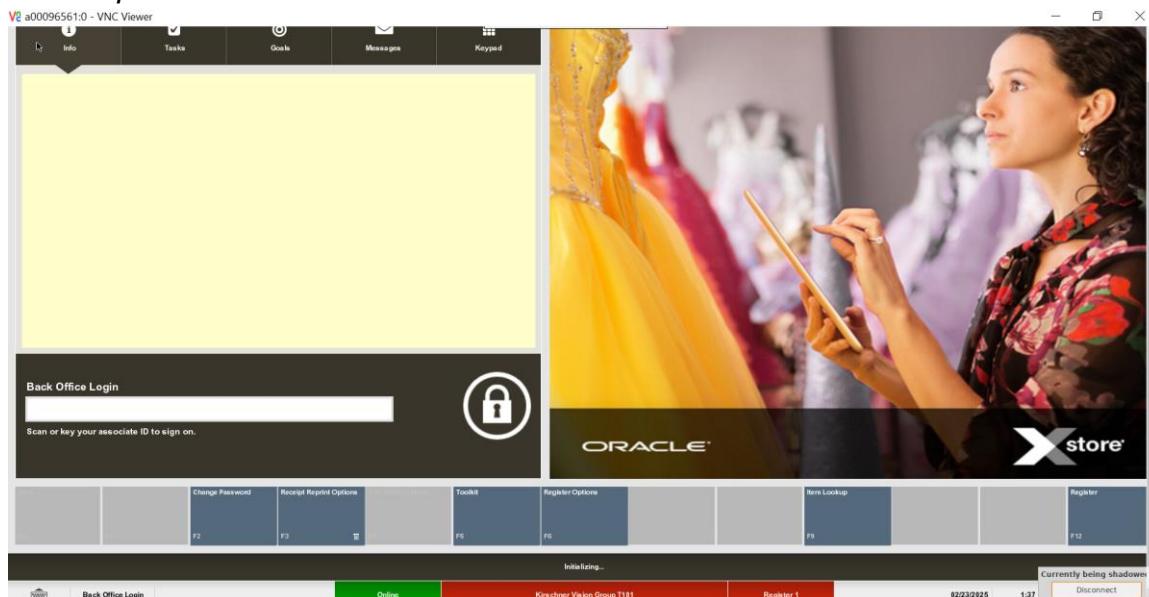
**Select:**

- 2 Open/Close Options
- 2 Store Close
- Click Ok



10

- Enter a closing comment if you'd like and click ok
- Your location and register numbers should both be in red since your Till & all stations are now closed.
  - Note- there is no way to view these notes in the morning if you click past the note when it pops up at opening so avoid putting patient order/communication in these notes



**Closing paperwork should be retained in your DCR for 90 days.**

Closing paperwork includes:

- Ciao! Optical receipts
- Credit Card receipts
- Closing documents (Ciao! & Credit Card devices)
- LPA paperwork (Lab Reconciliation Audit & Lab Tickets)
- Dispense/Tracy Tickets
- Any coupons redeemed (if applicable)
- Sales audit emails (if applicable)

# BANKING

## Processes Overview

# POLICY & PROCEDURES

## Bank Deposit & Cash Handling



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### Policy

- The location's deposit and cash fund must be secured at all times. At night, the register drawer must be left open and empty. Remove the till fund from the register and secure in the safe along with the night's deposit.
- Count the opening cash drawer fund each morning and evening, documenting the count on the Cash Drawer Report, listing tender counts (1s, 5s, etc.), and sign-off by the authorized key holder.
- Any overage/shortage must be documented on the Daily Closing Report (DCR).
- Cash drawer fund increases, or decreases must be authorized by Operations. Notify Sales Audit, 513-765-2525 or salesaudit2@luxotticaretail.com with the dollar amount and effective date for increases or decreases.
- All \$50s and \$100s are to be removed from the register and secured in the safe as soon as possible.
- Locations are not to have a Morale Fund or Petty Cash Account.

### Procedure

- The management or authorized key holder is responsible for closing the cash drawer at the end of each business day.
- Closing procedures must be implemented after the location is closed. After closing, transactions can no longer be made until the next business day.
- Deposits should be prepared and deposited in the location's specific bank branch.
- Armored Car Service deposits (select locations) should be held in the safe until scheduled pickup. Verify with armored car service personnel the total deposits being picked up and ensure that the armored car service personnel signs deposit pickup log.
- Management and authorized closing leaders are directly responsible for the preparation and deposit of the location's cash deposit to the bank.
- The deposit amount must equal the deposit total shown in Ciao! Optical for that day and totals must never be altered or changed. All excess/ overage monies must be deposited the next day and not held aside at the location.
- It is the Practice Manager's (PM) ultimate responsibility to ensure that deposits are being properly credited to the location and that proper validation is received from the Sales Audit Department for each deposit. Deposit slips should be pre-populated with the location's bank account number and location number.

- Maintain a \$400 cash float (not for petty cash)
- Cash refunds can only be given if enough cash is on hand- never go below \$400 float (example- \$500 cash refund, the till must have \$900)
- If a cash paying patient requests a refund but no cash has been received that day, refund via Home Office Check.
- Home office checks may also be used for insurance refunds (initiated by your biller)

# POLICY & PROCEDURES

## Bank Deposit & Cash Handling



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**A daily deposit, including checks/cash should be made to your bank location. Two associates, at least one management, must be present to count the day's cash. Retrieve a bank deposit slip, the deposit bag, and Daily Closing Report (DCR) Envelope.**

1. Record the totals on your bank deposit slip and in the Currency, Coin, and Checks fields during the cash closing process
2. Record each check by writing the patient's last name on the deposit slip and total the dollar amount. All checks must be endorsed with your location's bank deposit stamp or by writing "TeamVision Deposit Only"
3. Complete the balance of the deposit slip in both locations on the deposit slip
4. Record the deposit bag number on the deposit slip, preparer initials, date and time. **Both the manager and witness print and sign the deposit slip**
5. Remove and set aside the top deposit slip (white) to include with the deposit bag
6. Remove and set aside the middle deposit slip (yellow copy) to include with the DCR
7. Leave in the deposit slip book the bottom deposit slip (blue copy)

To reorder your locations bank deposit slips or stamp, email [treasury@luxotticaretail.com](mailto:treasury@luxotticaretail.com)

- Canada locations will email TVOps to reorder.
- If you need Deposit Slips for an Insurance Account (NCNO Account), email TVOps.

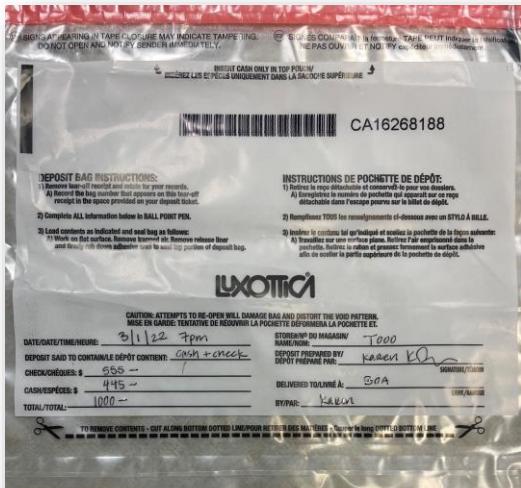
# POLICY & PROCEDURES

## Bank Deposit & Cash Handling



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**Prepare and complete deposit bag documentation in ball point pen and on a flat surface prior to inserting any cash, checks, or the deposit slip.**



- Place all cash and checks into the deposit bag along with the completed deposit slip (white)
- Insert cash only in top pouch
- Insert checks & deposit ticket in bottom pouch
- Seal all portions of the deposit bag
- Place your closing fund, and sealed deposit if not taken immediately to the bank, in the safe and lock the safe immediately
- Deposits should be taken to the bank a minimum of once a week by the manager
- Manager will log when the deposit(s) were taken on the deposit log

- Remove the top portion once completed and attach to the blue copy in the deposit slip book

Deposit bags should be used for a single day' deposit and multiple days should not be combined. Ensure the items to be deposited are properly inserted into the correct sections of the Luxottica deposit bag to ensure no extra fees are incurred when the deposit is processed by the bank.

Luxottica Deposit Bags can be ordered on Central Purchasing, **CP #3003334**

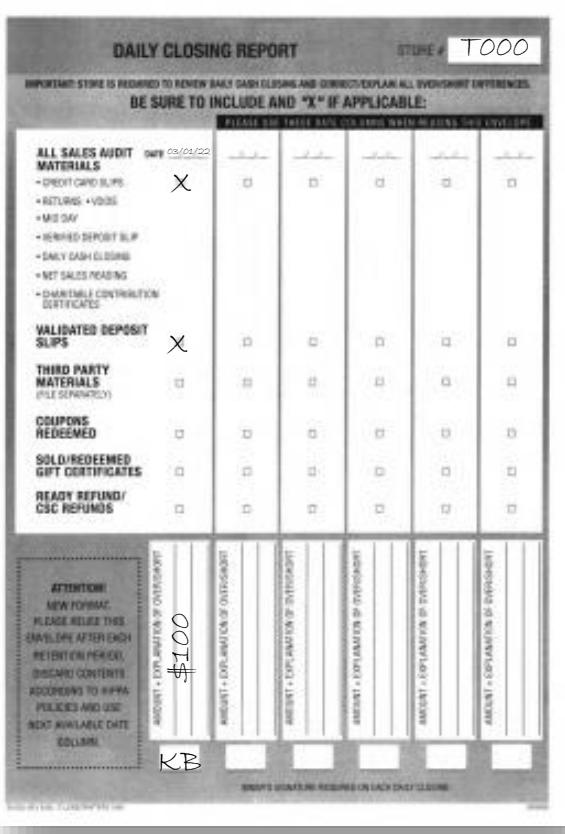
# POLICY & PROCEDURES

## Bank Deposit & Cash Handling



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**Prepare and complete Daily Closing Report (DCR) Envelop and include receipts (store copy), sales audit materials, middle (yellow) copy of the deposit slip, and any coupons or other sales related materials.**



The image shows a template for a Daily Closing Report (DCR) envelope. The envelope is addressed to 'TOOO'. The top section contains the title 'DAILY CLOSING REPORT' and the store number 'TOOO'. Below this is a section titled 'IMPORTANT: STORE IS REQUIRED TO REVIEW DAILY CASH CLOSING AND DIRECTLY EXPLAIN ALL OVER/SHORT DIFFERENCES. BE SURE TO INCLUDE AND "X" IF APPLICABLE: PLEASE USE THREE BACK SLASHES WHEN READING THIS LISTING.' The main body of the envelope is a grid for tracking various types of sales and deposit slips. The columns are labeled: ALL SALES AUDIT MATERIALS, DATE (03/01/20), VALIDATED DEPOSIT SLIPS, THIRD PARTY MATERIALS (FILE SEPARATELY), COUPONS REDEEMED, SOLD/REDEEMED GIFT CERTIFICATES, and READY REFUND/ CSC REFUNDS. Each row has a checkbox next to it. The bottom section contains an 'ATTENTION' note: 'NEW FORMATE. PLEASE USE THIS ENVELOPE AFTER EACH RETENTION PERIOD. DISCARD CONTENTS ACCORDING TO HIPPA POLICIES AND USE NEXT AVAILABLE DATE COLUMN.' It also includes a section for 'AMOUNT + EXPLANATION OF OVER/SHORT' with a box for '\$100' and 'KB'. At the bottom, it says 'SIGNATURE REQUIRED ON EACH CLOSING'.

1. Include your site number in the Store # box on the top right of the DCR
2. Fill out the date (MM/DD/YY)
3. Check off and include all items that are applicable for the day
4. Write the deposit amount and explanation of over/short if applicable
5. File in chronological order in the back office & retain for 3 months

Before your first deposit, the Practice Manager needs to pick up night deposit keys if applicable. Keys should be stored in the site safe when not being used. When picking up the deposit keys, confirm with the bank the process for exchanging larger bills for change.

Daily Closing Report (DCR) Envelopes can be ordered on Central Purchasing

**CP #3000606**

# POLICY & PROCEDURES

## Bank Deposit & Cash Handling



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**Practice Manager, Assistant Manager and/or Closing Leader will own and complete the deposit log nightly and prior to going to the bank.**

- Closing Manager or Key Holder will fill out column 1 and 2 – **Date and Deposit Amount**. If there is no deposit fill write no deposit in column 2
- Before the Practice Manager or Assistant Manager takes the deposit to the bank, fill out column 3 and 4 – **Date Deposit Taken to the Bank and Manager Signature**
- Sales Audit will email the manager email account with the deposit confirmation. The Practice Manager should **print and file the confirmation behind the deposit log** and **complete column 5 – Date Deposit Confirmed by the Bank**

**From:** Deposit Confirmations <[Deposit\\_Confirmation@luxotticaretail.com](mailto:Deposit_Confirmation@luxotticaretail.com)>  
**Sent:** Tuesday, April 16, 2024 8:55 AM  
**Cc:** Alcantar Rafael <[ralcantar@luxotticaretail.com](mailto:ralcantar@luxotticaretail.com)>; Hettinger, Kaitlin <[Khetting@Luxotticaretail.com](mailto:Khetting@Luxotticaretail.com)>  
**Subject:**

Subject:  
Status: Open  
From: [Deposit Conf Inbox](#)  
To: [TeamVision T002](#)  
Cc: [Rafael Alcantar](#) [Kaitlin Hettinger](#)  
Attachments:

Hello,

The following is confirmation of a received bank deposit. Please print this confirmation and retain with your daily paper work.

Store Number	Deposit Date	Amount	Bank
T002	4/11/24	(\$227.98)	Cash T002 T003 T027-T031

Sales Audit Contact: Deposit Conf Inbox  
Email: [Deposit\\_Confirmation@luxotticaretail.com](mailto:Deposit_Confirmation@luxotticaretail.com)

Thank you!

- The deposit log and bank confirmations should be kept in a secure location and retained for 90 days
- If a deposit is lost or stolen, the Manager will need to complete an incident report and immediately notify their Regional Manager Asset Protection (RMAP)

# BANK DEPOSIT LOG

Month of \_\_\_\_\_



# TeamVision

Eye care, together.

# SALES AUDIT

## Reconciliation



**At the close of business, it is everyone's responsibility to reconcile accurate closing funds. The Sales Audit department reviews all transactions and will reach out when discrepancies are identified.**

- ✓ In most cases, Sales Audit will provide direction on how to correct, but it will require you to research the issue at hand. You must reply to Sales Audit **within 5 days** of receiving the notification.
- ✓ The best way to avoid these situations are by reconciling your funds daily to confirm a match between Ciao! Optical & your site Credit Card Terminals (BofA, Finix, Stax).

### Follow These Process To Avoid Sales Audit Discrepancies:

#### Return/Exchange Process

- Enter Vision Care benefits exactly as entered for the original transaction
- Tender out a return and a new sale together so they zero each other out rather than processing a "refund" and "sale" separately

#### Closing Procedures

- All services and materials must be entered in Ciao! and payment recorded (in Ciao! & credit card device) on the date of service.
- Balance EACH payment type exactly (CareCredit, MasterCard, AMEX, Visa)
  1. Compare what was charged with what was entered into Ciao!
  2. If money doesn't match, complete a return/exchange to correct the error **SAME DAY**
  3. When needed, detailed notes must be put on the outside of your closing envelope & Sales Audit notified.

**Pre-Conversion Balances:** You will be given specific direction during your integration week

- THESE SHOULD ONLY BE PAID VIA CREDIT CARD OR CHECK (if Cash is the only option-reach out to your biller)
  1. Cash/Check should be deposited into PREVIOUS PC Owner's bank account- NOT in TeamVision bank accounts
  2. (Location Specific) When available, legacy Credit Card processors should be utilized
  3. Payment should be recorded in legacy EHR
- WHEN DIRECTED BY OPS: If TeamVision Credit Card Device is used
  1. Email [salesaudit1@luxotticaretail.com](mailto:salesaudit1@luxotticaretail.com) with [tvops@teamvisionteam.com](mailto:tvops@teamvisionteam.com) on CC
  2. "Pre-conversion balance collected on X/X/XX date for \$XX.XX via CARD TYPE through Credit Card Device. Please apply to PC Owner AR for location TXXX."



### Pre-Conversion Balances (con't)

- If a patient requests to use CareCredit:

- 1. Pre-authorization from RM/MM/Ops should be obtained**
2. Email [salesaudit1@luxotticaretail.com](mailto:salesaudit1@luxotticaretail.com) with approving RM/MM/Ops on CC
3. "Pre-conversion balance collected on X/X/XX date for \$XX.XX via CareCredit. Please apply to PC Owner AR for location TXXX."

### Patient Statement Payments (i.e. patient came in for medical visit, received a statement in the mail for unmet deductible/coinsurance fees)

- PATIENT SHOULD ALWAYS BE DIRECTED TO PAY AS DIRECTED ON STATEMENT
- Credit/Debit card payments should be processed through a SEPARATE online portal, NOT Stax/in-house devices. Defer to your site biller for the appropriate portal processing.
  - Some will use Transaction Express App (reach out to your medical biller)
  - Rosin will use BofA Accounts (see Kat Santa-Ana for directions)
- Cash/Checks should be deposited into the NCNO insurance account (NOT the same account as normal daily patient deposits). Defer to PC Owners and Billers for NCNO account information.
- If a patient requests to use CareCredit:
  - 1. Pre-authorization from RM/MM/Ops should be obtained**
  2. Email [salesaudit1@luxotticaretail.com](mailto:salesaudit1@luxotticaretail.com) with approving RM/MM/Ops on CC
  3. "Post-conversion statement balance collected on X/X/XX date for \$XX.XX via CareCredit. Please apply to NCNO Bank account for location TXXX."

# MISSING DEPOSIT (MD) & OVER SHORT (OS) FLOWCHART



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Cash  
Over/ Short

Created when an office fails to reconcile discrepancies during nightly closing

- Tuesdays: Auto-email with instructions for correction of previous week
- **ACTION: FIND THE REASON** – email SALESAUDIT, cc MM & Ric Bennett
  - **Cash Over** – attach the new Ciao! Receipt in the email
  - **Cash short** – attach documentation (armored car pick up log driver signed, verified deposit slip stamped by bank, new receipt with correct tender, etc.)
- 2<sup>nd</sup> Week – if no resolution, another email is sent to office
- 3<sup>rd</sup> Week – if no resolution, another email is sent to office with TVOPs on copy

Credit Card  
Over/ Short

Created when an office fails to reconcile discrepancies during nightly closing

- Tuesdays: Auto-email with instructions for correction of previous week
- **ACTION: COLLECT PAYMENT/REFUND PATIENT** – email SALESAUDIT, cc MM & Ric Bennett (if not collecting payment from patient, please note with reason in email)
  - **Credit Card Over/Short** – attach the receipt for the discrepancy charge/refund
- 2<sup>nd</sup> Week – if no resolution, another email is sent to office
- 3<sup>rd</sup> Week – if no resolution, another email is sent to office with TVOPs on copy

Cash Missing  
Deposit

Created when the bank does not receive a deposit it was expecting from the office

- Tuesdays: Auto-email with instructions for correction of previous week
- **ACTION: FIND THE DEPOSIT** – email SALESAUDIT, cc MM & Ric Bennett
  - **Cash Missing Deposit** – attach the verified deposit slips
- 2<sup>nd</sup> Week – if no resolution, another email is sent to office
- 3<sup>rd</sup> Week – if no resolution, another email is sent to office with TVOPs on copy

Aged Item  
Write-Offs

Created by items that have not received a response; or the response did not result in recovery of \$ after 60 days

- Tuesdays: Auto-email with instructions for correction of previous week
- **ACTION: NO ACTION can be taken with patient at this point – \$ are lost**
  - If a site has identified the issue and emailed Sales Audit but has not collected/refunded any payment, then the issue will still show on the report as 'Resolved' but the money will still be written-off

## COACHING OPPORTUNITY:

- Sites with over \$1,000 YTD send nightly email Field Leader with pictures of the closing paperwork from Ciao! and Credit Card terminal showing they match!!

# HOW TO READ THE REPORT



RETURN TO TABLE  
OF CONTENTS

Amount	Item Status	Incident Open Date	Net Amount
50		10/9/2024	5
1110		10/9/2024	111
220		10/9/2024	22

On any tab, there is an ITEM STATUS column

- O = Open issue that needs resolved: meaning store has not provided a reason for discrepancy or collected/refunded payment
- R = Resolved: The store has provided a reason for the discrepancy, but the payment may not have been collected or refunded, leaving an unresolved issue that will still result in a write-off.
- For items resolved over 60 days ago, they have likely already been written off but may not have been removed from the report

A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Current Open Over Short		formula				formula		formula				formula
2													
3	Source	Store	RMAP	Tran Dat	Tran Code Description		Tran Code Sign		Tender	Amount	Item Status	Incident Open Date	Net Amount
394	Bank	T001	Mordaunt, Paul	10/1/2024	Amex Settlement		C		Credit Card	1,591.41	O	10/9/2024	1,591.41
395	POS	T001	Mordaunt, Paul	9/30/2024	POS American Express		D		Credit Card	159.94	O	10/9/2024	(159.94)
396	POS	T001	Mordaunt, Paul	9/30/2024	POS American Express		D		Credit Card	1,359.47	O	10/9/2024	(1,359.47)
657													
658													
659													
660													
661													
662													
663													
664													

## OVER/SHORT TAB EXPLAINED

For the purposes of this example, we filtered to one site only and hid unnecessary columns.

- Under SOURCE column
  - Bank = amount entered in CC terminal
  - POS = amount entered in Ciao!
- In this example the total amount entered in Ciao! (POS) is **\$1519.41** (\$159.94 sale + 1359.47 sale)
- The amount entered in the CC terminal (BANK) was **\$1591.41** creating the discrepancy from flipping the 9 and 1 of the amount.

**It is important to note that BANK dates may be 2-3 days after POS transaction date due to processing.**

# CASH OVER/SHORT

## Example 1: Deposit Discrepancy



RETURN TO TABLE  
OF CONTENTS

Hello,

The amount deposited in your site's bank account is different from the amount entered into the site's POS system (Ciao! Optical), creating a variance of **\$15.00**. Please provide an explanation and send any documentation supporting this variance within 7 days of this notification.

Store Number	Trans Date	Source	Description	Amount	Bank	Store Name
T117	5/16/24	Pos	POS Cash Sales	\$137.00	Cash Deposits	Chariho Eye Care T117-Wyoming
T117	5/28/24	Bank	ExBank Deposit CR	(\$162.00)	Cash Deposits	Chariho Eye Care T117-Wyoming
T117	5/23/24	Pos	POS Cash Sales	\$10.00	Cash Deposits	Chariho Eye Care T117-Wyoming

**NET OVER(+)/SHORT(-)=\$15.00**

PLEASE NOTE: A net overage (i.e., Register amount is less than Bank Deposit amount) is shown as a positive amount and a net shortage (i.e., Register amount is greater than Bank Deposit amount) is shown as a negative amount.

In this example, the deposit (Bank) is more than the cash the site closed with in Ciao! (Pos) so that could mean the office missed entering a sale in Ciao! that they took cash for.

### Resolution Questions to consider:

1. Was there an incorrect entry under a different payment type?
  - Is there another patient entry for \$15 in the Ciao! Back Office- [Electronic Journal](#)?
  - Use [Credit Card Report](#) and your Sum by Card Type to identify who was incorrectly tendered in Ciao! Optical (entered in Ciao! Optical as card instead of cash)
2. Did we forget to enter a patient service?
  - Cross reference E.H.R./schedule to paid services in Ciao!
3. Was it a mistake counting change?
4. Was there a fraudulent bill?
5. Solve & notify Sales Audit ([Salesaudit1@luxotticaretai.com](mailto:Salesaudit1@luxotticaretai.com)) of resolution. CC your Field leader:
  - **Cash Over** – attach the new Ciao! Receipt in the email
  - **Cash short** – attach documentation (armored car pick up log driver signed, verified deposit slip stamped by bank, new receipt with correct tender, etc.)
  - Print two copies of the Sales Audit email:
    - File one with the date it was resolved.
    - File the other with the date it occurred.
  - Keep both with the daily closing paperwork.

# CREDIT CARD OVER/SHORT

## Example 2: Tendering Error



RETURN TO TABLE  
OF CONTENTS

Hello,

The amount deposited in your site's bank account is different from the amount entered into the site's POS system (Ciao! Optical), creating a variance of **\$-44.10**. Please provide an explanation and send any documentation supporting this variance within 7 days of this notification.

Store Number	Trans Date	Source	Description	Amount	Bank	Store Name
T040	7/2/24	Bank	Visa Settlement	(\$4.90)	Visa Mastercard	TVO Asheville T040-Asheville
T040	7/1/24	Pos	POS Visa Dr	\$49.00	Visa Mastercard	TVO Asheville T040-Asheville

NET OVER(+) / SHORT(-) = **\$-44.10**

PLEASE NOTE: A net overage (i.e., Register amount is less than Bank Deposit amount) is shown as a positive amount and a net shortage (i.e., Register amount is greater than Bank Deposit amount) is shown as a negative amount.

In this example, the credit card settlement (Bank) is less than the charge the site closed with in Ciao! (POS). This looks like a simple error of incorrectly entering amount into the credit card terminal.

### Resolution Questions to consider

1. Identify which charge is correct? (CC or Ciao!)
  - Use the Ciao! Back Office- [Electronic Journal](#) and the CC terminal receipts in office to reconcile
2. If we have under charged patient- apologize to patient and collect funds due
3. If we have over charged a patient- return original and enter a new sale, tending together to net out a refund due back to patient.
  - For [cash refunds](#), must have cash in till
  - If no cash taken, or patient not in office, refund via Home Office Check (Confirm address in Ciao! prior to tender)
4. Solve & notify Sales Audit (Salesaudit1@luxotticaretai.com) of resolution. CC your Field leader:
  - **Credit Card Over/Short** – attach the receipt for the discrepancy charge/refund
  - Print two copies of the Sales Audit email:
    - File one with the date it was resolved.
    - File the other with the date it occurred.
  - Keep both with the daily closing paperwork.

# MISSING CARD PAYMENT

## Example 3: Card Not Charged



RETURN TO TABLE  
OF CONTENTS

Hello,

Your site's credit card terminal (Staxx device) is showing no transactions for the date listed below which is creating an outage of **\$-420.00**. Please pull your daily transaction receipts and research this outage.

Store Number	Business Date	Tran Code Name	Amount	CardNumber
T127	5/7/24	POS Mastercard Dr	\$420.00	3687

NET TOTAL= **\$-420.00** (amount missing in the credit card terminal).

If you had credit card terminal issues and your terminal is now working correctly, please do the following within 5 days of this notification:

- (1) Please use your manual receipts and key the missing transactions into the credit card terminal only. Do not key them into the POS terminal (Ciao! Optical).
- (2) Please make sure that amounts, credit card numbers, and expiration date are correct.
- (3) Please note that keying these transactions will create an out of balance when you do your end of day, which will offset the variance listed above. If you are still experiencing credit card terminal (Staxx device) issues or have any questions, please respond to this email or contact Sales Audit at 513-765-2525 within 5 days of this notification.

### NOTE FROM SALES AUDIT:

In this example, the credit card settlement (Bank) is missing and the site closed recording patient tender in Ciao! (POS). The payment was not taken in the credit card device.

### Resolution Questions to consider

1. Use the Ciao! Back Office- [Electronic Journal](#) Electronic Journal to identify the patient.
2. Contact patient: explain, apologize, take payment over phone.
3. After solving, email Sales Audit ([Salesaudit1@luxotticaretaile.com](mailto:Salesaudit1@luxotticaretaile.com)) of resolution. CC your Field leader:
  - Print two copies of the Sales Audit email:
    - File one with the date it was resolved.
    - File the other with the date it occurred.
  - Keep both with the daily closing paperwork.

# MISSING CIAO! TRANSACTION

## Example 4- Refund Not Recorded



RETURN TO TABLE  
OF CONTENTS

Hello,

Your site's POS system (Ciao! Optical) is showing no transactions for the date listed below which is creating an outage of **\$-150.00**. Please pull your daily transaction receipts and research this outage.

Store Number	Business Date	Tran Code Name	Amount	CardNumber
T006	3/1/24	Visa refund	\$150.00	3033

NET TOTAL= **color="red">\$-150.00**

If you had POS system (Ciao! Optical) issues and your system is now working correctly, please do the following within 5 days of this notification:

- (1) Please use your manual receipts and key the missing transactions into the POS system (Ciao! Optical) only. Do not key them into the credit card terminal (Staxx device).
- (2) Please make sure that amounts, credit card numbers, and expiration date are correct.
- (3) Please note that keying these transactions will create an out of balance when you do your end of day, which will offset the variance listed above. If you are still experiencing POS system (Ciao! Optical) issues or have any questions, please respond to this email or contact Sales Audit at 513-765-2525 within 5 days of this notification.

In this example, the credit card settlement (Bank) is showing a refund that was not recorded in Ciao! Optical (POS).

### Resolution Questions to consider

1. Identify the patient using the credit card charge slips and other resources (scheduler, LPA Reconciliation audit, etc.)
2. Enter and record patient refund in Ciao! Optical.
3. After solving, email Sales Audit (Salesaudit1@luxotticaretai.com) of resolution. CC your Field leader:
  - Note-if Cash is missing-attach the verified deposit slips
  - Print two copies of the Sales Audit email:
    - File one with the date it was resolved.
    - File the other with the date it occurred.
  - Keep both with the daily closing paperwork.

# SYSTEMS DOWN

# SYSTEMS DOWN OVERVIEW



RETURN TO TABLE  
OF CONTENTS

As soon as you identify your system is down login to [OneLink](#) to check broadcast messages (or call SSS 1-877-765-5252) and report your 'down system'. Notify your Field Leader.

Transactions unable to be processed due to systemic issues must be accurately recorded. Having a plan and system or process in place is key. Use of the following pages are not required, but will assist you should systems go down.

**Remember your credit card device is not integrated, so take patient payment/copays while the patient is in the office!** You can record in Ciao! Optical once systems are fully operational.

## Tips for success:

- Simplify the process-use operational systems (i.e., if E.H.R operational but Ciao! Optical is not- continue to use the E.H.R)
- If manually recording patient order details, ensure accuracy and review with a peer to avoid recalling the patient back into the office.
- Capture email so you can email patient receipts once entered into Ciao! Optical.
- If needed, record patient services/materials on [Systems Down Form](#).
- If needed, record patient and payments on [Systems Down Log](#).
- Secure patient payment details in a secure spot.
- Email Sales Audit ([Salesaudit1@luxotticaretail.com](mailto:Salesaudit1@luxotticaretail.com)) of closing discrepancy (include SSS ticket number) and print a copy of the email for your closing paperwork.
- Do not dispense eyewear or contact lenses until products have been paid for and recorded in Ciao! Optical.

## Practice Manager/ Key Holder Responsibility:

1. If down systems impact patient care, call SSS to attempt to resolve the issue and notify your Field Leader. **Field Leader escalate to TVOps if system is down for longer than 1 hour.**
2. Develop a plan and process to keep yourself organized (E.H.R, Forms, etc.).
3. Enter all System Down services/materials into Ciao! Optical once system is online.
4. Verify accurate completion of all orders.
  - Ensure transactions are assigned to the correct team member when entering sales into Ciao Optical!
  - Once tendered, select Email receipt prompt and click **Email & Print-** hand out printed copy at dispense.
5. If systems down for more than 24 hours, email Sales Audit of the closing discrepancies on the day of payment collection and the date entered into Ciao!
  - Print copies of email and retain in closing paperwork.

# SYSTEMS DOWN FORM

## Patient Demographics:

Name:	Birthday:
Address:	Mobile Phone: Home Phone:
Email:	PMOC:

**Prescription:** Outside Rx- make a photocopy

BC/DIA

R			
L			

**Doctor Name:**

**RX Date:**

**EXP:**

## Frame Details:

Brand:

Color:

UPC:

Model:

Eyesize:

**Lens Details:** Circle or write in

Lens Type:	SV: Far Mid Near	Progressive	Bifocal/ Trifocal
Lens Design:			
Material:	High Index: 1.67 1.74	Polycarbonate	Plastic (CR 39)
Anti-Reflective Coating:		Transitions/Sun Treatments:	

<b>Contact Lenses:</b>	Quantity: (R) (L)	Ship To:
------------------------	----------------------	----------

**Payment Details:** Staple Credit Card receipt to this form

Total Due:

**Payment Type:**

Total Paid Today:

Card last 4 & CID #

COD:

Employee Name:

## Notes:

# SYSTEMS DOWN-INSURANCE

## Medical Exams

If your E.H.R is operational, create medical invoice in E.H.R. and staple to Systems Down Form

**Medical Insurance Carrier:**

ID Number:		Services/CPT Codes	Patient Copay or Deductible	Payment Collected
Primary Subscriber:				

## Routine Exams

If your E.H.R is operational, create routine invoice in E.H.R. and staple to Systems Down Form

### Routine Insurance Carrier:

ID Number:		Services/CPT Codes	Patient Copay or Deductible	Payment Collected
Primary Subscriber:				

## Routine Materials

### Routine Insurance Carrier:

ID Number:		Materials/CPT Codes	Patient Copay or Deductible	Payment Collected
Primary Subscriber:				

# SYSTEMS DOWN TRACKER

Date(s) \_\_\_\_\_



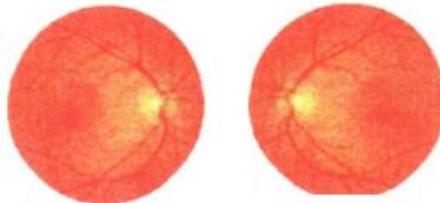
# TeamVision

Eye care, together.

Name: \_\_\_\_\_ Age: \_\_\_\_\_ Sex:  M  F Date: \_\_\_\_\_

CC

HPI				Ocular Hx: _____				LEE: _____																																																	
								LME: _____																																																	
				<b>Med Hx:</b> <input type="checkbox"/> DMx ____ yrs FBS ____ A1c <input type="checkbox"/> HTN <input type="checkbox"/> High Cholesterol <input type="checkbox"/> Other: _____																																																					
<b>Preliminary Testing</b> <b>VA</b> OD sc 20/ OS 20/ Distance				<b>Performed by:</b> _____ <b>VA</b> ODsc 201 GUCL Near				<b>Allergies:</b> _____	<b>Medication(s)</b> <input type="checkbox"/> None <input type="checkbox"/> Reviewed																																																
Habitual RX age: _____ OD: _____ OS: _____				Type: BF/TF/DVO/NVO/Pro Add: _____				<b>AR/Obj</b> OD: _____ OS: _____																																																	
General observation: _____ P/P/T x 0 1 2 3   Mood: N/D/A								<b>Sub</b> OD: _____ OS: _____	20/ 20/ <input type="checkbox"/> Trial Framed																																																
								<b>OD</b> PERRLA(-)APD EOM FROM CF FTFC																																																	
Tonometry APPL NCT ICARE OD _____ OS _____ mm Hg @ _____ am/pm								<b>OS</b> <b>Additional Testing</b> CT D: _____ N: _____ NPC: _____ BCC: _____ NRA: _____ PRA: _____ CV OD: _____ OS: _____ STEREO local: _____ global AMSLER OD: _____ OS: _____	<b>Working Distance</b> Reading: _____ Comp: _____ Phone: _____																																																
								<b>Dilated Fundus Exam:</b> <table border="1"> <thead> <tr> <th>C/D</th> <th>/</th> <th><b>OD</b></th> <th><b>I</b></th> <th><b>OS</b></th> </tr> </thead> <tbody> <tr> <td>ONH</td> <td>P/D</td> <td>Pallor</td> <td>NVD</td> <td>P/D</td> <td>Pallor</td> <td>NVD</td> </tr> <tr> <td>Macula</td> <td>F/I</td> <td>Drusen</td> <td>CSME</td> <td>F/I</td> <td>Drusen</td> <td>CSME</td> </tr> <tr> <td>Vessels</td> <td>2/3</td> <td>Atten</td> <td>Nicking</td> <td>2/3</td> <td>Atten</td> <td>Nicking</td> </tr> <tr> <td>Retina</td> <td>F/I</td> <td>NVE</td> <td>Heme</td> <td>F/I</td> <td>NVE</td> <td>Heme</td> </tr> <tr> <td>Vitreous</td> <td>Cl</td> <td>Syneresis</td> <td>PVD</td> <td>Cl</td> <td>Syneresis</td> <td>PVD</td> </tr> <tr> <td>Periphery</td> <td>F/I 360</td> <td>RD</td> <td>Hole</td> <td>F/I 360</td> <td>RD</td> <td>Hole</td> </tr> </tbody> </table>			C/D	/	<b>OD</b>	<b>I</b>	<b>OS</b>	ONH	P/D	Pallor	NVD	P/D	Pallor	NVD	Macula	F/I	Drusen	CSME	F/I	Drusen	CSME	Vessels	2/3	Atten	Nicking	2/3	Atten	Nicking	Retina	F/I	NVE	Heme	F/I	NVE	Heme	Vitreous	Cl	Syneresis	PVD	Cl	Syneresis	PVD	Periphery	F/I 360	RD	Hole	F/I 360	RD	Hole
C/D	/	<b>OD</b>	<b>I</b>	<b>OS</b>																																																					
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Vitreous	Cl	Syneresis	PVD	Cl	Syneresis	PVD																																																			
Periphery	F/I 360	RD	Hole	F/I 360	RD	Hole																																																			



### Impression:

- Presbyopia h52.4 \_\_\_\_\_
- Myopia h52.1 \_\_\_\_\_
- Hyperopia h52.0 \_\_\_\_\_
- Astigmatism h52.20 \_\_\_\_\_

1 OD 2 OS 3 OU

### Plan

- RTC:  1 year/PRN  ASAP for DFE/PRN
- Spectacle RX  CLs finalized
  - CLs f/u 1 week
  - Other: \_\_\_\_\_
- CEE new  CEE est  Sph fit  Toric fit  Mono/MF fit
- RGP fit  OV  Fundus Photo

Physician's Signature \_\_\_\_\_

O.D. OPC

Referred to:

### Educated Patient on:

- Importance of Annual DFE/CEE
- Cataracts, Glare & UV protection
- Lid hygiene/Warm Compresses BID
- Si/Sx of Retinal Detachment
- RTC STAT if any changes in vision
- Decreased vision 2° to:
- DES & Tx Options: [ ] AT \_\_\_\_/d a y
- Eye protection/Polycarbonate
- Glaucoma, risk of blindness, & needed flu's
- Macular Degeneration, use of Amsler grid & lutein
- Cholesterol/Blood pressure control & care with PCP
- Blood sugar control & care with PCP/meds/exercise
- Other: \_\_\_\_\_

[ ] Take frequent breaks with near/comp work (20/20/20 rule)  
 [ ] Fish oil / Flax seed oil

## EYEGLASS PRESCRIPTION

Patient Name:	Optometrist Name:
Exam Date:	License Number:
Expiration Date:	Address:
	Phone:

	Sphere	Cylinder	Axis	Prism	Add	<input type="checkbox"/> Single Vision <input type="checkbox"/> Progressive <input type="checkbox"/> Bifocals <input type="checkbox"/> Trifocals <input type="checkbox"/> Distance <input type="checkbox"/> Near <input type="checkbox"/> Non-Glare <input type="checkbox"/> Transitions <input type="checkbox"/> Sun
OD						
OS						

Optometrist Signature:
------------------------

## CONTACT LENS PRESCRIPTION

Patient Name:	Optometrist Name:
Exam Date:	License Number:
Expiration Date:	Address:
	Phone:

	MFG	Lens Type	Color	BC	DIA	SPH	CYL	Axis	Add
OD									
OS	Same As Above <input type="checkbox"/>	Same As Above <input type="checkbox"/>							

Discard Lenses:  Daily  Bi-Weekly  Monthly  Other

Optometrist Signature:
------------------------

# APPENDIX



## Why Do We See Unknown O.D.s In O.D. Reporting?

- No Doctor was selected for FRAME ONLY (including PLANO SUN) Ciao! Optical Orders
- No Doctor was selected for ACCESSORIES & WELLNESS Ciao! Optical Orders
- Using Neutralization for Rx OD
- Selecting External OD for an exam service

## Why is this important?

- Selecting the right doctor's name ensures that the correct doctor's personal productivity is captured and accurate.

## Our Solution:

- For true unknowns meaning this is an outside patient with no connection to an OD in your practice, select NO DOCTOR. We've added a doctor called NO DOCTOR to your INTERNAL and EXTERNAL local doctor list for you.
  - Always select **INTERNAL or EXTERNAL**
  - Type in DOC (or any 3 consecutive letters)
  - **NO DOCTOR** will appear in the dropdown – select it
- This will ensure that we no longer have UNKNOWN ODs in the reporting. Remember – select the correct OD every time. If truly an external patient not associated with the clinic, select No Doctor – this should be very rare..

**FOR FRAME ONLY, PLANO SUN, ACCESSORIES & WELLNESS. SELECT THE CORRECT DOCTOR. IF TRULY UNKNOWN, SELECT NO DOCTOR FROM THE LIST.**

Source

DOCTOR, NO

Source

DOCTOR, NO

## FRAME ONLY & PLANO SUN

Select the correct OD. Ciao! Optical doesn't require an OD for this order type so you need to select Internal or External Rx as the Source and then search/select No Doctor.

- **No Doctor represents a truly unknown doctor.**

Fake Patient

Frame Order Worksheet Order Completion

<input type="text" value="Item #"/> <input type="text" value="Brand: Prada"/> <input type="text" value="Style #"/> <input type="checkbox"/> Unknown Frame	<input style="border: 1px solid #ccc; padding: 2px 10px;" type="button" value="Source: External Rx"/>  <input type="text" value="doc"/> DOCTOR, NO	<input style="border: 1px solid #ccc; padding: 2px 10px;" type="button" value="Search"/>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10px; text-align: right;">Description</td> <td style="width: 10px; text-align: right;">Retail Price</td> </tr> <tr> <td>PR 0105, Blk, Gry Grd</td> <td>\$279.00</td> </tr> <tr> <td>PR 0105, Blk, Blk Grd</td> <td>\$279.00</td> </tr> <tr> <td>PR 0105, Trt Brn, Blk G P</td> <td>\$329.00</td> </tr> <tr> <td>PR 0105A 55 CONCEPTUAL, Blk Shn, Gry Gr</td> <td>\$279.00</td> </tr> <tr> <td>PR 0105A 55 CONCEPTUAL, Trt, Grn Grd</td> <td>\$279.00</td> </tr> </table>	Description	Retail Price	PR 0105, Blk, Gry Grd	\$279.00	PR 0105, Blk, Blk Grd	\$279.00	PR 0105, Trt Brn, Blk G P	\$329.00	PR 0105A 55 CONCEPTUAL, Blk Shn, Gry Gr	\$279.00	PR 0105A 55 CONCEPTUAL, Trt, Grn Grd	\$279.00
Description	Retail Price														
PR 0105, Blk, Gry Grd	\$279.00														
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PR 0105, Trt Brn, Blk G P	\$329.00														
PR 0105A 55 CONCEPTUAL, Blk Shn, Gry Gr	\$279.00														
PR 0105A 55 CONCEPTUAL, Trt, Grn Grd	\$279.00														

Frame In store  
 Frame not in store  
 Frame in store, Special Order

Item #: 679420888507 Style: PR 0105, Trt Brn, Blk G P  
 Color: Trt Brn      Retail Price: \$329.00

Customer Order

Location 29001 457569 [Logout](#)



## ACCESSORIES & WELLNESS

- Accessories and Wellness should be entered into Ciao! Optical/Customer Order – with the Ciao! Optical patient profile.
  - This includes Co Management Fees, etc.**
- Select the correct OD. Ciao! Optical doesn't require an OD for this order type so you need to select Internal or External Rx as the Source and then search/select No Doctor.
- No Doctor represents a truly unknown doctor.**

### ALWAYS SELL ACCESSORIES & WELLNESS IN CUSTOMER ORDER WITH PATIENT PROFILE.

- Adding as a Quick Sale Directly in XStore (tendering application) even as an add on to patient order (exam, etc.) will result in an unknown OD.
- Always enter with the profile and select the correct doctor.

## EXAMS- SHOULD ALWAYS BE INTERNAL Rx OD

When placing an Exam sale in Ciao! Optical, Customer Order – ALWAYS SELECT INTERNAL RX (as the source).

- You will be required to select the correct doctor in the Doctor Name field
- Note that External Rx is an option in the Source dropdown. This option is never applicable for us. If a patient is getting an exam in our clinic, they must be seeing a doctor.






## NEUTRALIZATION

- Selecting Neutralization will result in an Unknown OD.
- For rare instances involving neutralization, see chart below on how to enter in Ciao! Optical.



	Prescription Type: Bifocal/Progressive	Rx Date: 7/6/2022															
Doctor:	Date Written: 7/6/2022	Rx Type: BF/Prog															
	Expiration Date: 7/6/2023	Source: Neutralization															
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>SPH</th> <th>CYL</th> <th>AXIS</th> </tr> </thead> <tbody> <tr> <td>OD(R) +0.00</td> <td></td> <td></td> </tr> <tr> <td>OS(L) +0.00</td> <td>-0.50</td> <td>180</td> </tr> <tr> <td>ADD(R)</td> <td>+2.50</td> <td></td> </tr> <tr> <td>ADD(L)</td> <td>+2.50</td> <td></td> </tr> </tbody> </table>			SPH	CYL	AXIS	OD(R) +0.00			OS(L) +0.00	-0.50	180	ADD(R)	+2.50		ADD(L)	+2.50	
SPH	CYL	AXIS															
OD(R) +0.00																	
OS(L) +0.00	-0.50	180															
ADD(R)	+2.50																
ADD(L)	+2.50																

**Best practice is to confirm with OD on Rx extensions. We encourage annual eye exams and neutralization should be uncommon and exception based. Note that the ability to neutralize does vary by state and REQUIRES state licensed opticians to read eyewear.**

<b>Clinic Patient</b>	<ul style="list-style-type: none"> <li>• Look up past Rx and OD.</li> <li>• Enter in as Internal and select correct doctor.</li> <li>• If that doctor is no longer employed/working at the practice, select No Doctor.</li> <li>• Make Rx Date &amp; Expiration Date the same and = to the date you neutralized (dates will match and represent a 1-day Rx valid timeframe).</li> <li>• Note in Rx Notes that this Rx was Neutralized.</li> </ul>
<b>Not a Clinic Patient- External</b>	<ul style="list-style-type: none"> <li>• Enter in as <b>External</b> and select <b>No Doctor</b>.</li> <li>• Make Rx Date &amp; Expiration Date the same and = to the date you neutralized (dates will match and represent a 1-day Rx valid timeframe).</li> <li>• Note in Rx Notes that this Rx was Neutralized.</li> </ul>

## DAILY REPORTING

- Following these steps will ensure there are no UNKNOWN doctors in reporting.
- No Doctor will represent Unknown.
- We are sending a DAILY report to your clinic's shared email account with any unknowns processed (Fiscal

Month to Date). YOU SHOULDN NEVER SEE ORDERS ON THE LIST WITH UNKNOWN DOCTOR.

- If you do, you will need to correct (return/re-renter) the order and ensure the right doctor selection (either the correct doctor or No Doctor). This will not appear on the next day's report. Work with the team member to avoid future instances.
- If you don't have anything on the list – GREAT! No action required.

**We need everyone support and attention to this matter. We are sending files to lead doctors every Friday (weekly) for visibility. At the end of the fiscal month, there will be no opportunity to adjust.**

