

Click the links and speakers below to be redirected

Team Member or Patient Books Exam

Capture patient demographics, insurance, and other patient information. It is recommended that patient use the Patient Portal to update demographics, insurance, and access their records as needed.



- ▶ [Scheduling within RevolutionEHR](#)
- ▶ [Schedule Overview within RevolutionEHR](#)
- ▶ [Adding a New Patient within RevolutionEHR](#)

Confirm Appointment

Use confirmation system or call patient to confirm patient information and prepare for patient arrival including insurance information.

Note: It will help flow day of if you add or update existing patient profile in Ciao! Optical at this time.



- ▶ [Ciao! Optical Profile Search](#)

Confirm Insurance & Authorization

Pull via Courier Website or Trizetto within 24-48 hours prior to the patient arrival.



- ▶ [Check Patient Eligibility within Trizetto](#)

Enter Insurance & Prep Routing Slip

Update Patient Profile (may need to reference prior EHR for patient information and Rx) and print next day Routing Slips. You can do this individually or for all appointment scheduled that day.



- ▶ [Entering Insurance into RevolutionEHR](#)
- ▶ [Uploading Documents within RevolutionEHR](#)

Patient Arrives

Welcome patient and scan in any needed documentation (consents, insurance, etc.).



- ▶ [Checking In a Patient within RevolutionEHR](#)

Patient Encounter

Tech checks in patient in RevEHR, capture PMI and testing. Doctor will complete patient exam, codes, and Rx in EHR. Print all final RXs for patient.



- ▶ [Patient Questionnaire Sound Bite](#)
- ▶ [Comprehensive Visual Testing & Optical Exam within RevolutionEHR](#)
- ▶ [Assessment, Plan, & Coding within RevolutionEHR](#)

Patient Transition & Check Out

Doctor transitions patient to a team member providing the printed prescriptions. Team Member will invoice in RevEHR.

Note: You will complete payment in Ciao! Optical under the patient profile.

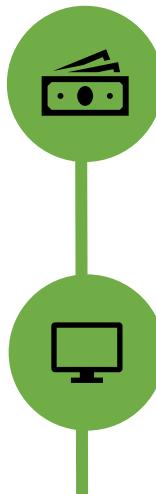


- ▶ [RevolutionEHR Invoice Guide](#)
- ▶ [Medical Invoice within RevolutionEHR](#)
- ▶ [Routine Insurance within Revolution EHR](#)

Click the links below to be redirected

Ciao! Optical Open & Close

Each day you will open and close Ciao! on Register 1. Ensure you are operating on the correct business day and close Ciao! each business day. In back office, is where you will open/close, enter cash count, and confirm deposits.



► [Opening Ciao! Optical](#)

► [Closing Ciao! Optical](#)

► [Opening & Closing Documents](#)

Ciao! Optical Patient Profile

Add new patients or search for existing patient. All patients will have a profile if a payment is collected for services or materials including insurance. Each visit, update address and contact information if applicable.

► [Patient Demographics in Ciao! Optical](#)

An optimal **Patient & Doctor Hand-Off** includes the doctor, patient, and optician/optical team member. The transition of the patient is **not** a transfer to a salesperson; instead, it is a professional transfer to a colleague who has the knowledge required to help the patient achieve their greatest visual outcome.

Learning about your patient starts inside lane and must be transferred to the optical floor. Facilitating a conversion around lifestyle, pain points, and needs is the first step in meeting your patients needs. Learning about your patient starts with **asking the right questions!**

 [Doctor Hand Off Sound Bite](#)

Consultative Selling (needs-based selling) focuses on understanding and addressing the specific needs of the patient. It involves identifying the patient's goals, challenges, and pain points, and then positioning your product as the solution that best meets those needs.

EVERY Patient deserves to be an informed decision maker in their purchase! We OWE it to our patient to **recommend the best products** as their trusted advisor. These products are Doctor recommended and patient preferred. Use **LensSimulator** with every patient to reinforce your recommendations, celebrate their lens, or educate and compare options!

Ciao! Optical Prescription Entry

Enter patient prescriptions into the patient order for contacts or glasses including expiration date. When an Rx has expired it will be greyed out and unavailable to use for patient orders.



► [Rx Entry into Ciao! Optical](#)

► [Rx Entry in Ciao! Optical](#)

► [Adding an Outside OD into Ciao!](#)

► [Trifocal FAQ](#)

► [Cash Pay Exam Check Out in Ciao! Optical](#)

► [Routine Insurance Exam In Ciao! Optical](#)

► [Medical Insurance Exam in Ciao! Optical](#)

► [Insurance Guide](#)

Tender Patients Doctor Services

In Ciao! Optical, team member pulls up patient in Ciao! Active Order tab to post the sale and take payment on the credit device.

Note: It is required to provide hard copy prescriptions to the patient for both glasses and contacts if services tendered that day.

Enter Contact Lens Orders

In Ciao! Optical, use the final Rx or guidelines for specialty lenses. Disposable lenses come direct from the vendor (free shipping to home or to the practice). Order shipped to address in Ciao! Profile.



Click the link below to watch the video

- ▶ [Selling Disposable Contact Lenses in Ciao! Optical](#)

- ▶ [Selling Specialty Contact Lenses in Ciao! Optical](#)

-  [Contact Lens Quick Reference Guide](#)

LensSimulator is a digital patient education tool accessible on the TeamVision iPad. Use this tool with every patient to compare lens options, reinforce lens selection, or educate patient on lens designs and options. Lens facts, details, and videos are available for the patient and/or team member.

The **Lens Portfolio Guide** should be leveraged for pricing and ranges for optical orders. For Contact Lens pricing including instant savings, use the **Contact Lens Price Card**. Pricing and availability will align to Ciao! Optical pricing. Taxes will be added based on State or City regulations when orders are moved to tender in XStore.

Additionally, the **Promotions Card** will provide all discount codes and details for limited time offers.

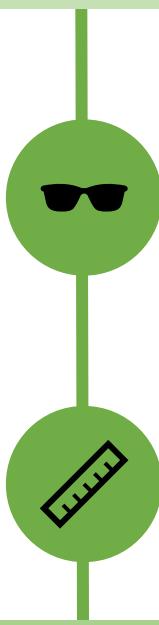
Enter Optical Orders

In Ciao! Optical, add insurance or promotions and tender. Enter all Doctor Services, Exams, Glasses, Contacts, Wellness, and Accessories.

Note: You will Tender in XStore (extension of Ciao! Optical). Additionally, for credit cards, take payment in credit card terminal (ensure total, tender type, & amount match).

EyeRuler2 Digital Measurements

From Ciao! Optical Customer Order, you will launch the digital measurement application. Attach the sensor to the patient's eyewear and complete the process to capture images and review measurements.



- ▶ [Frame & Lens Selection in Ciao! Optical](#)
-  [Smart Shopper Soundbite- patient can't find a frame in Office](#)
-  [Smart Shopper Soundbite-customizations](#)
- ▶ [Deals & Discounts in Ciao! Toolkit](#)
- ▶ [Adding a Provider in Ciao! Optical for Wellness & Frame Only Transactions](#)
-  [Co Management Entry](#)
- ▶ [Measurements & Order Completion Screen in Ciao! Optical](#)
-  [EyeRuler2 Documents](#)
-  [Introducing EyeRuler2 Soundbite](#)

We offer an **Eyewear Protection Plan (EPP)** for accidental breakage and damage powered by Asurion. This can be added to the order in Ciao! Optical at the time of sale or at pickup for \$35. This includes one year of coverage with replacement eyewear provided for only \$25. This does not cover theft or loss, and eyewear must be collected at time of redemption.

Tender Patient Out For Materials

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

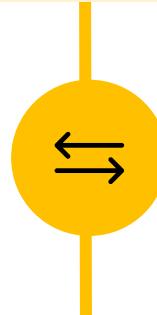


- ▶ [VSP & Contact Lenses in Ciao! Optical](#)
- ▶ [VSP Auto-Calculations Eyeglass \(select locations only\) in Ciao! Optical](#)
- ▶ [VSP Bill Actual Eyeglass in Ciao! Optical](#)
- ▶ [VSP Selling Contact Lenses over \\$1000 in Ciao! Optical](#)

Outside of peak business times, our **Service Promise time for RxO Orders will be Same Day Next Week** for general assortment complete, lens only, lens only cut & edge. VSP or other lab-based insurance orders follow the same service promise date although they are manufactured within their lab network (vs. RxO). Details found in **Order Management Guide**.

Transmit Optical Orders In Lab Processing Application (LPA)

All optical orders, transmit to RxO or for Insurance lab orders "park" in RX Sun Authentics. LPA will direct to ship frame as needed. Lab locations this is where you edit lens SKU's, box measurements, & thickness.



Click the links below to be redirected

- ▶ [Transmit to RxO](#)
- 📄 [Shipping to RxO](#)
- ▶ [Transmit to Insurance or Other Labs](#)
- 📄 [Change to Insurance Required Lab](#)

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

- Make sure your frame has the temple tag COMPLETELY fill out with legible penmanship
- Wrap the **LAB ORDER TICKET** around the frame with a **RUBBER BAND**
- Ship Next Day Air Saver to lab via EASY SHIP portal

Monitor Orders

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



▶ [Order Tracker](#)

📄 [Order Tracker Overview](#)

📄 [RxO Escalations Process](#)

RxO is available via email only (no phone) for **Order Escalations**. Email TeamVision@luxotticaretail.com if you need to check the status of your eyewear or have questions about RxO cancelations. Please follow the specific format including subject line to ensure your email gets answered promptly.

Note: If your frame (FTC Order) is not matched up by 3rd day, you can email your tracking number to email Luxproductgroup@luxotticaretail.com.

Completes Order in LPA

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



▶ [Order Completion and Eyewear Inspection](#)

▶ [Failed Inspection & Reorder](#)

Patient Notification & Dispense

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



📄 [Order Completion through Dispense](#)

▶ [Dispensing Orders](#)

Our goal is 100% satisfaction! If the patient or customer is not completely satisfied with the purchase within the first 30 days, we will make it right. We stand behind our product and will replace any defective lenses or frames. We offer free exchanges for Doctor Prescription Exchanges within 90 Days and Cataract Surgery Exchanges within 6 Months.

Returns

Select the Patient History and the desired order to process the return. The order will move to the Active Order list with a red box indicating the Return. Select to move to XStore for tender. Credit card returns you will also process the refund on the card terminal.

Note: You must use the original form of tender and/or credit card. For cash payments it is recommended to refund via Home Office Check.

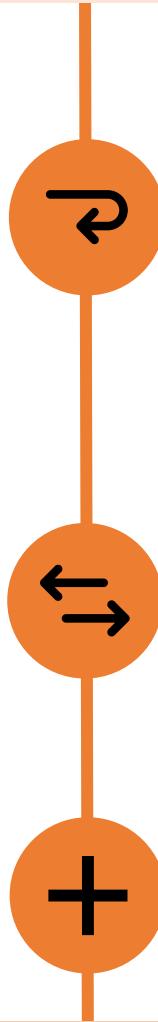
Exchanges

Select the Patient History and the desired order to process the exchange. The order screen will turn red and enter the desired changes to the order and move to Active Order. Tender in XStore and complete the normal process including tender, transmission (this is considered a new order).

Note: Contact Lenses cannot be exchanged and must be returned and resold.

Add or Remove EPP

The EPP is process as an exchange but move to the Active Order list for you to complete the transaction in XStore.



Click the links below to be redirected

► [Return in Ciao! Optical](#)

 [Returns & Exchanges Guide](#)

► [Exchange in Ciao! Optical](#)

► [Add or Remove EPP in Ciao! Optical](#)

A remake can cost your office as much as \$120 per remake – this includes product and/or manufacturing cost, time for the Team Member to trouble shoot and/or enter the remake, as well as potential chair time of the Doctor. **The goal is to have under 10% total remakes for your location.**

Prevent Remakes and Reason Code Selection – use the Eyewear Analysis Form to help prevent remakes, identify root cause, and document remakes for learning and coaching. If proceeding with a remake, ensure you select the code that is the primary reason for remake and address all other concerns. This will allow you to coach and train to selling or learning gaps more accurately.

Eliminate Preventable Remakes – many remakes are preventable, and practices should work urgently to reduce these by using the Tools & Resources (EyeRuler, Lens Simulator, Lens Ranges, etc.), double checking the data we enter in Ciao! Optical, and focusing on Consultative Selling.

Your **Frame Recovery Box** is a place in the office to store all Frame Returns, Exchanges & Damages with a copy of the receipt. Additionally, you will want to have a **Contact Lenses Return or Exchange Box**. A company-initiated return of this product (unopened, not expired, or damaged) will be completed quarterly within Fiori. Details found in **Inventory Management Guide**.