

# PATIENT & SYSTEMS

## Training Guide

# TABLE OF CONTENTS

Click the links below to jump to this section:

## Overview

[Key Information](#)

## Hardware & Systems Overview

[Hardware Overview](#)

[Systems Overview](#)

[SSS: IT Flow Chart](#)

[SSS: OD Equipment Flow Chart](#)

## Patient & Systems Journey

[Front Desk](#)

[Patient Encounter](#)

[Check Out](#)

[Opening Ciao! Optical](#)

[Closing Ciao! Optical](#)

[Demographics, Rx, and Exams](#)

[Contact Lenses](#)

[Eyeglasses](#)

[iPad Applications](#)

[EyeRuler2](#)

[Wellness, Accessories, & Tendering](#)

[Additional Insurance Practice](#)

## Ciao! Optical Order Management

[Order Transmission, Contact Lens Trials & Specialty](#)

[Order Completion](#)

## After the Sale

[Returns & Exchanges](#)

## Office Operations (PM & Key Leaders)

[Ciao! Back Office, AP, Communications, Toolkit](#)

[Site Maintenance, Inventory Management, Supply Ordering, Kronos](#)





**Welcome to TeamVision! We are excited to kick off your learning journey!**

- You will use this guide during integration week and with your post support team member to continue your learning journey with RevolutionEHR & Ciao! Systems.
- Please complete the pages (sections) for your role within the office.
- *This is a great tool to use if you'd like to learn a different roles and systems within your practice.*

**Fill in as provided:**

|                                           |            |                            |
|-------------------------------------------|------------|----------------------------|
| My RevolutionEHR Login & Password:        | <b>ID:</b> | <b>PW:</b>                 |
| My EssilorLuxottica ID Number & Password: | <b>ID:</b> | <b>PW:</b> TeamVision2025! |
| My EssilorLuxottica Individual Email:     |            |                            |
| My EssilorLuxottica Site Email:           |            |                            |
| My Site Number:                           |            |                            |
| My Field Leader:                          |            |                            |
| My HR Business Partner:                   |            |                            |
| My Integration Week Partners:             |            |                            |
| My Medical Biller- Name & Contact Info:   |            |                            |
| My Routine Biller- Name & Contact Info:   |            |                            |

Note- all individual passwords should be reset from TeamVision2025! at the end of integration week.

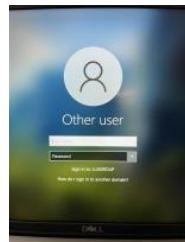
**Notes:**

# HARDWARE & SYSTEMS OVERVIEW

Start Here



Login Screen

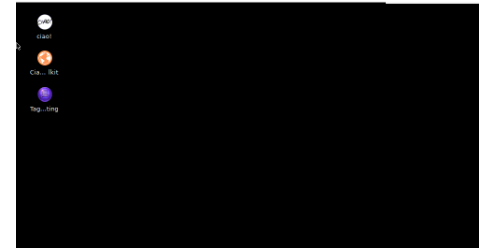


## Dell Computer:

- Can be a desktop or a laptop.
- Frequently called your "OD Computer"
- Open network.
- Similar functions to your home PC (can save passwords, websites, etc.).
- Used to maximize RevolutionEHR and allow for easy access to insurance carriers.



Home Screen



## Ciao! Optical Computer:

- Igel: The device/computer that operates Ciao! Optical Point of Sale & Toolkit Applications.
- iPad: Mobile station.
- Closed network.
- Can not save passwords, websites, etc.

## To Toggle between Ciao & Dell Computers:

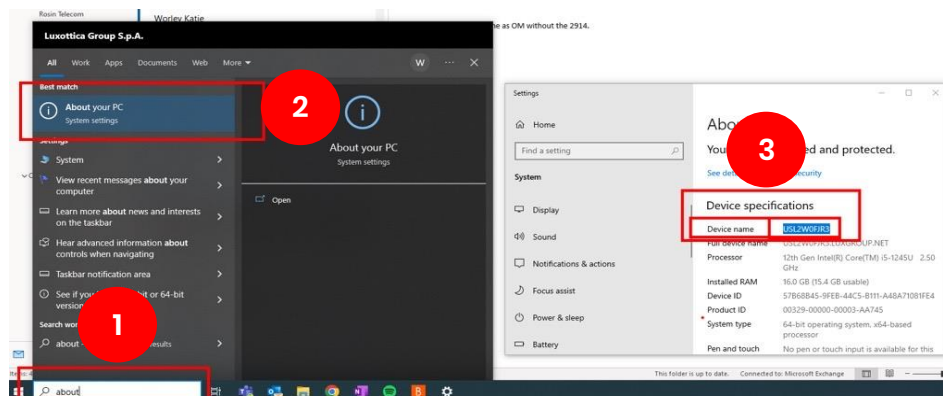
1. KVM Switch: Click the button.
2. **Keyboards:** Click double Scroll Lock to switch between your Ciao! & Dell computer. With newer keyboards you will have to hold down the Function Key at the same time!

KVM Switch



For hardware support, call **Store Systems Support at 1 833 467 4243 OR use OneLink via the Toolkit.**

- Dell Computers: To locate the computer name, review the image below.



- Ciao! Optical Computers: When calling SSS to access your IP address follow these steps:
  1. Click the up and down arrow on bottom right of the screen
  2. Click more details



## Additional Notes:

- **Workstations:** Not all offices receive the same equipment; may vary by location and practice size.
  - Pre Integration-Your Ops Manager will partner with key leaders to determine workstations based on practice flow.
  - Post Integration- Although rare, in certain instances, you can work with your Field Leader to create a business case for additional workstations (must be patient facing and drive business).
  - All hardware provided by TeamVision (EssilorLuxottica) will have an Asset Tag affixed on the equipment (image below).
- **OD Equipment:** At the time of integration, you will now receive new doctor's equipment.
  - RevolutionEHR Integration- Your Operations Manager will integrate as much of the exam equipment into Revolution as possible, depending on the age of the equipment and its software capabilities.
- **Zebra Tag Printer:** Used to print frame tags for new frames provided by TeamVision.
- **Zappy Sign:** Counter Card that will be linked with your Google Account for patients to use at checkout.

Asset Tag Example



Zebra Tag Printer



Zappy Sign



## Top iPad Apps:

- iPad Unlock: 029XXX (example- T174 would enter 029174).
- You can not download personal apps.
- Key Apps highlighted below:



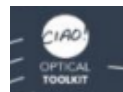
**Xstore**  
Used To Enter  
& Tender  
Orders



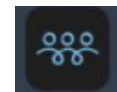
**Ciao!  
Optical**  
Point of Sale  
(may be  
hidden)



**EyeRuler 2**  
Digital  
Measurement  
System



**Ciao! Toolkit**  
How-To Guides  
Quick Links



**Smartly**  
Communication  
& Task Platform



**Lens  
Simulator**  
Educational  
Lens App

Watch all Patient Journey videos & Google Classroom videos via your Dell Computer



## RevolutionEHR: (Recommended to access on your Dell Computer)

- Will be bookmarked on your home screen (Dell Computer) or accessed via Ciao! Toolkit (pg 2)
- Scheduler & hold patient demographics.
- Electronic Health Records System (Patient Portal available).
- Electronic Medical Insurance filing.
- General patient demographics & some insurance data transferred from your previous E.H.R. system (this is site specific based upon the legacy E.H.R. access).
- Some software customizations available-based on practice group.



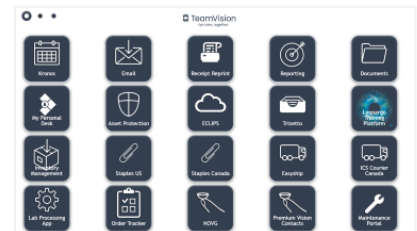
## Ciao! Optical: (Can be accessed on iPad and/or Desktop, closed network)

- Point of sale system.
  - Note: enter ALL services into Ciao! Optical (Medical, Routine, Cash Pay)
- Files claims with some Routine Insurance carriers.
- Holds order history.
- Existing patient demographics will be loaded into Ciao! Optical.
- Xstore- the tendering application within Ciao! Optical.
- Can not customize software.



## Ciao Optical Toolkit: (Located on iPad, Ciao! or Dell Computers)

- Quick links to various applications, insurance carriers, and various websites.
  - Note: Reporting App must be viewed on Ciao! Computer.
- Resource center:
  - How to guides.
  - Pricing & promotional guides.



## Order Management: (all accessed via the Ciao! Toolkit)

- **Lab Processing Application (LPA):** Transmit orders to RxO or indicate an insurance required lab will be utilized.
- **Order Tracker (OT):** Electronic monitoring of orders.
- **Nassau OOGP Vision Group (NOVG):** A contact lens supplier that will provide most of your soft trial lenses as well as fulfil patient orders. They will also supply wellness products for sale at the practice.
  - Note: you will be set up with specialty contact lens vendors in addition to your NOVG account (PM will be provided log in details)
- **Inventory management:** Provides stock summaries, manages inventory, and houses Central Purchasing (CP) for supply ordering.



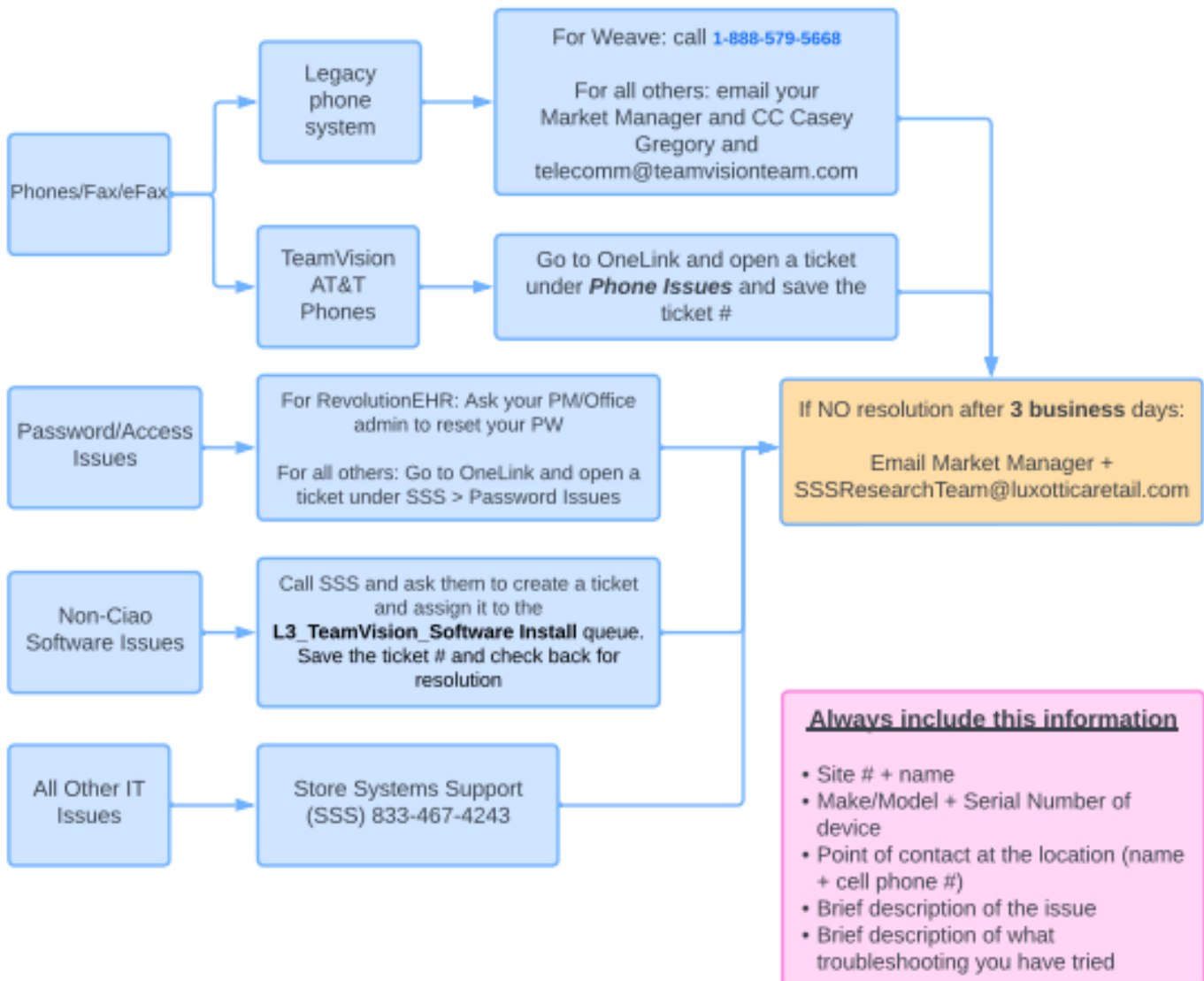
Before using **OneLink** (via the Toolkit) or calling **Store Systems Support 1 833 467 4243**, use this flow chart to determine the correct department.

## IT EQUIPMENT

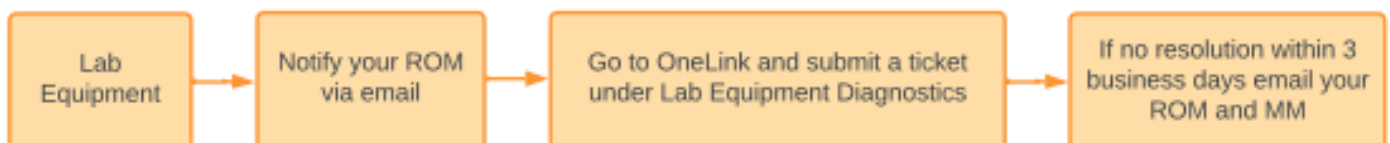
If the problem device is leased, rented or if you are unsure, contact your Market Manager.

Note: IT issues should not be entered into Service Channel.

**Store Systems Support (SSS) 833-467-4243**



## LAB EQUIPMENT



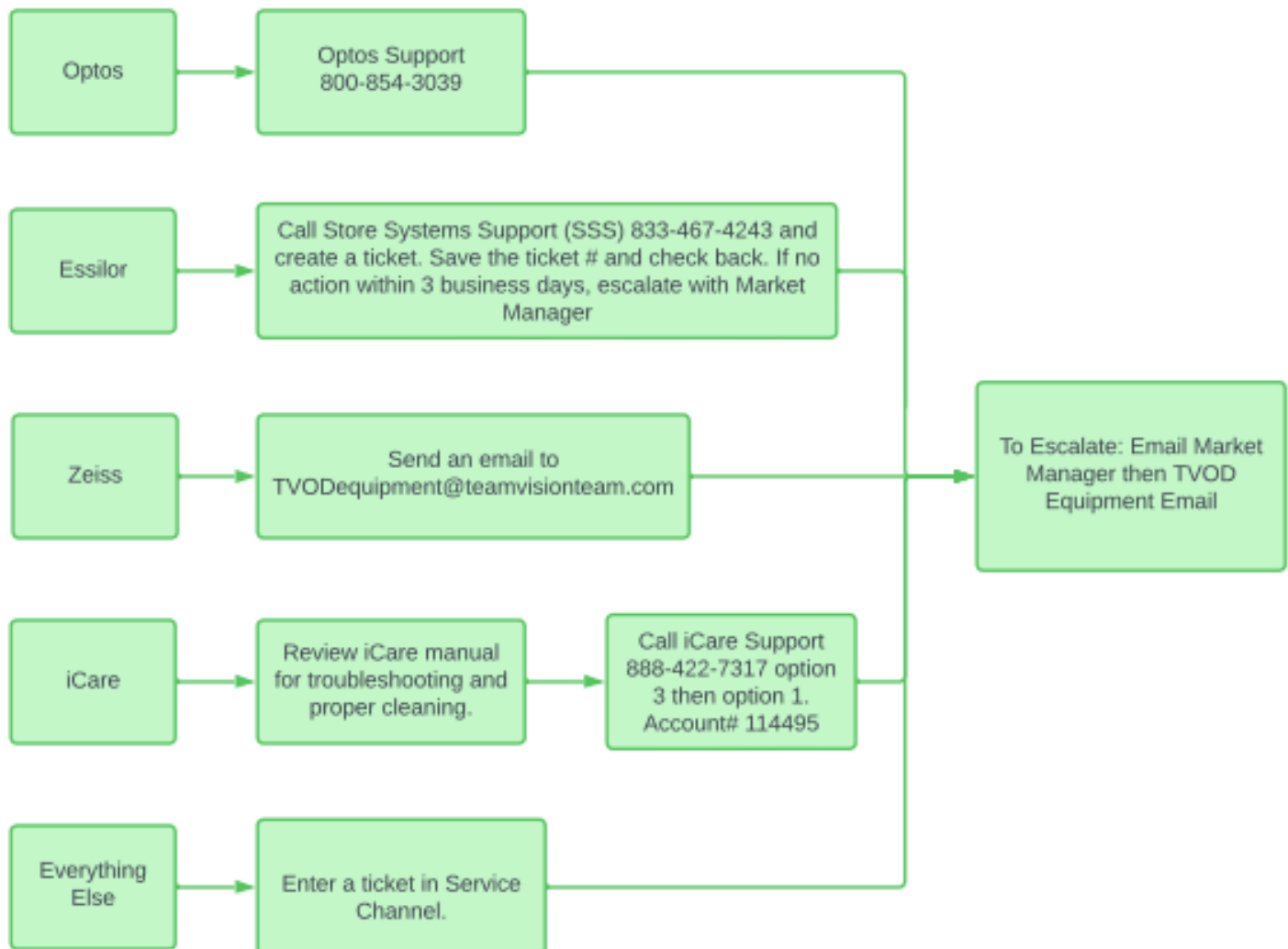




# OD EQUIPMENT

OD Equipment includes all diagnostic testing equipment used for ophthalmic care (OCT, Visual Field, AR, Lensometer, Tonometer, Acuity Chart, Lane Equipment, etc.)

Issues with any review software should be reported to the manufacturer. If the manufacturer cannot support, follow the *Software support flow under IT Equipment*



## Always include this information

- Site # + name
- Make/Model + Serial Number of device
- Point of contact at the location (name + cell phone #)
- Brief description of the issue
- Brief description of what troubleshooting you have tried

# PATIENT & SYSTEMS JOURNEY

Start Here

# PATIENT JOURNEY

RevolutionEHR



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

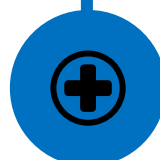
Welcome patient and scan in any needed documentation (consents, insurance, etc.).



- ▶ [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.

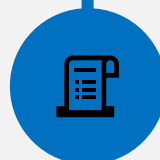


- ▶ [Patient Questionnaire Sound Bite](#)
- ▶ [Comprehensive Visual Testing & Optical Exam within RevolutionEHR](#)
- ▶ [Assessment, Plan, & Coding within RevolutionEHR](#)

## 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](#)

Use the Patient Journey on the previous page, Google Classroom, RevolutionEHR Practice & Training, and Toolkit Documents to complete the following activities:

## Notes

### Scheduling Activities:

- ☐ Book an appointment
- ☐ Reschedule an appointment
- ☐ Cancel an appointment
- ☐ Change the type of appointment
- ☐ Mark confirmation call/confirmed
- ☐ Utilize Wait List
- ☐ Enroll patients in Patient Portal
- ☐ Update patient demographics
- ☐ Change communication preferences
- ☐ Print routing slip- individual and group
- ☐ Add a note to patient profile
- ☐ Utilize Task features

### Insurance:

- ☐ Add insurance to patient file
- ☐ Edit primary info
- ☐ Add fee schedule
- ☐ Delete an insurance plan
- ☐ Log into Trizetto to check medical benefits

### Documents:

- ☐ Scan in insurance card, benefit summary, or any other document
- ☐ Know what documents the doctor wants from the legacy system

**Bonus Activity.** How will you communicate to the patient that it may take a bit longer than normal???

Use the Patient Journey on the previous page, Google Classroom, RevolutionEHR Practice & Training, and Toolkit Documents to complete the following activities:

## Notes

- ☐ Know what documents the doctor wants from the legacy system
- ☐ Utilize the Live Consult Patient Questionnaire (Consultative Selling)
- ☐ Complete Interview
- ☐ Start timer
- ☐ Enter Chief Complaints
- ☐ Update previous Rx and Contact Lens details
- ☐ Add Retinal Images
- ☐ Add Lensometry
- ☐ Add Autorefraction, Tonometry, VA's, etc.

*Know how to complete the testing expected by your O.D. Varies by practice/OD preference*

## Notes

- ❑ Navigate through various Patient Encounters:
  - Routine
  - Medical
  - Office Visit
- ❑ Test integrated equipment
- ❑ Set up your RXNT (if applicable)
- ❑ Know how to EPrescribe with RXNT
- ❑ Find where to access your needed Documents (Chart synopsis, Referral letters, etc.)
- ❑ Practice Assessment & Plan and Coding
- ❑ Print Rx's and review FTC process
- ❑ Become familiar with Consultative Selling Tools: Patient Questionnaire, Lens Simulator, Price Guide, Lens Assortment, etc.

[illegible]

Use the Patient Journey on the previous page, Google Classroom, RevolutionEHR Practice & Training, and Toolkit Documents to complete the following activities:

## Notes

### Check Out:

*You must complete your 'check out' process in RevolutionEHR but also transfer all services to Ciao! Optical.*

- ☐ Complete any check out tasks assigned by OD
- ☐ Print Rx's and review FTC process
- ☐ Complete a Cash (Self Pay) Invoice
- ☐ Complete a medical insurance invoice (zero bulk assigned to patient and one with a patient copay)
- ☐ Complete a routine insurance invoice
- ☐ Remove a service from invoice
- ☐ Add a task (note) for billers
- ☐ Schedule additional testing
- ☐ Schedule next eye exam
- ☐ Send referral to M.D.
- ☐ End of day procedures:
  - Check for unassigned invoices by clicking Reports > Accounting > Unassigned items
  - Any additional office designated tasks

***Bonus Activity:*** *If your check out does not occur in the optical dispensary, how can you encourage your patients to check out your new frame selection & deals????*

# CUSTOMER JOURNEY

## Ciao! Optical & Toolkit

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](#)

### 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.



- ▶ [Cash Pay Exam Check Out in Ciao! Optical](#)
- ▶ [Routine Insurance Exam In Ciao! Optical](#)
- ▶ [Medical Insurance Exam in Ciao! Optical](#)
-  [Insurance Guide](#)



Use the Patient Journey on the previous page, Google Classroom, RevolutionEHR Practice & Training, and Toolkit Documents to complete the following activities:

### Notes

#### Open Ciao! Optical:

- ☐ Log into XStore Back Office
- ☐ Show how to Open Store and Register
- ☐ Review where cash is kept and to count/enter actual quantities into Ciao
- ☐ Review what to do if the date is incorrect in Ciao at opening (call SSS)

#### Other Opening Processes:

- ☐ Confirm office is prepared for patient arrival (Intake forms, insurance, previous chart, etc.)
- ☐ Check Take Action page in Order Tracker
- ☐ Team huddle/focus for the day reviewed with all team members

**Bonus Activity:** How can you prepare for a successful day? What other processes might need to be added to your daily routine?





Use the Patient Journey on the previous page, Google Classroom, RevolutionEHR Practice & Training, and Toolkit Documents to complete the following activities:

## Notes

## Closing:

- ❑ Review that system not integrated and what information will be entered in Ciao
- ❑ Review what to do with closing paperwork (receipts, lab, and dispense)
- ❑ Review Bank Log and Bank Deposit completed per guidelines
- ❑ Review how to print batch report on BofA or Finix Credit Card Machine
- ❑ Review bank deposit policy and how to order more deposit slips
- ❑ Review who to call if all registers won't close
- ❑ Exit Ciao! Applications on all devices & complete End of Day on Register 1:
  - Close Store and Registers
  - Fill in closing count
  - Complete a deposit
  - Fill out bank log

### Other Closing Processes:

- ❑ Confirm all pick-ups have been Dispensed out in Order Tracker (place tray tickets in closing paperwork)
- ❑ LPA: Confirm all Tendered orders are transmitted, and all Staged orders Deleted
- ❑ LPA: Run Lab Reconciliation audit, review, and place with closing paperwork
- ❑ Rev: Review Unassigned Invoice Report

[illegible]



Use the Patient Journey on the previous page, Google Classroom, RevolutionEHR Practice & Training, and Toolkit Documents to complete the following activities:

### Notes

#### Patient Demographics:

*This may already be done for you!*

- ☐ How to pull up and access a patient's Ciao! Profile from Active Tab
- ☐ Enter a new customer/ Family member
- ☐ Review/ Update demographics
- ☐ Change PMOC
- ☐ Enter a note
- ☐ Review Lifestyle info

#### Prescriptions:

- ☐ Enter the following RX's: SV, PAL, Trifocal, Contacts, Specialty Contacts
- ☐ Deactivate an RX, then reactivate
- ☐ Add new optometrist (don't save, just walk through the steps)

#### Enter Exams: Cash Pay

- ☐ Use Rev Invoice (s) to enter services
- ☐ Contact Lens Fitting only
- ☐ Add on only service (visual fields, Optomap, foreign body removal, etc.)
- ☐ Ensure the order is at ready status (ready for tender)

#### Add Insurance: (Routine & Medical)

- ☐ Search and select insurance plan
- ☐ Complete insurance demographic information
- ☐ Complete/Edit claim

**Bonus Activity:** TB with your OD/Peer to show off your consultative selling skills!

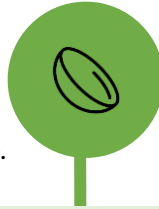
# CUSTOMER JOURNEY

## Ciao! Optical & Toolkit

*Click the link below to watch the video*

### 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.



- ▶ [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).



- ▶ [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](#)

### 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.



- 📄 [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 the 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](#)



Use the Patient Journey on the previous page, Google Classroom, RevolutionEHR Practice & Training, and Toolkit Documents to complete the following activities:

### Notes

#### Contact Lenses:

*Complete a combination of Cash Pay & Insurance (Bill Actual & Auto-Calc)*

- ☐ Order a year supply of daily lenses
  - Change to ship to site
- ☐ Order 6 months of monthly lenses
  - Change to ship to an alternate address
- ☐ Add Express Shipping
- ☐ Order Specialty Contacts & walk through how you would place the order
  - Order Biofinity Toric XR
  - Order an RGP lens
- ☐ If applicable: Process a Spectera Formulary Contact Lens Order in Ciao (PM only)
- ☐ In Toolkit, locate:
  - Contact Lens Quick Reference Guide
  - NOVG Guide
  - Contact Lens Email/Fax order form

**Bonus Activities:** *How will you educate your patients on the instant savings you can offer for year supplies?*

*What promotions can you leverage to get your contact lens patient into a new pair of eyeglasses or plano sun?*



Use the Patient Journey on the previous page, Google Classroom, RevolutionEHR Practice & Training, and Toolkit Documents to complete the following activities:

### Notes

#### Complete Pairs and Lens Only Transactions:

##### *Cash Pay Only*

- ☐ Practice the OD Hand off leveraging the patient questionnaire, Lens Simulator, and single lens recommendations
- ☐ Enter UPC (scan if using iPad)
- ☐ Select various lens options (Transitions, Sun, Clear/ SV, PAL, BF's, Tri)
- ☐ Add a lens add on (polish, mirror, tint)
- ☐ Attach EPP
- ☐ Add discounts:
  - Routine discount
  - Employee discount
- ☐ Take measurements with EyeRuler2
- ☐ Ensure the order is at ready status (ready for tender)
- ☐ Put a note in patient demographics

#### Insurance

*Now that you're comfortable selling eyeglasses, add in Insurance. Use the same steps and incorporate:*

- ☐ Search and select insurance plan
- ☐ Complete insurance demographic information
- ☐ Manually edit insurance in Ciao!
- ☐ LPA: take your staged order and walk through how to adjust the order for an insurance required lab



Use the Patient Journey on the previous page, Google Classroom, RevolutionEHR Practice & Training, and Toolkit Documents to complete the following activities:

### Notes

#### Lens Simulator:

- ☐ Can you locate the Lens Simulator Operations Guide in Toolkit?
- ☐ Can you seamlessly navigate the application?
- ☐ Practice presenting two different lens types
- ☐ Practice presenting two different lens features
- ☐ Practice using Lens Sim during the OD Patient Handoff
- ☐ Practice using Lens Simulator at eyewear dispense

#### Smart Shopper:

- ☐ Can you locate the Smart Shopper Operations Guide in Toolkit?
- ☐ With a peer, practice introducing smart shopper to a patient
- ☐ Practice finding petite frames
- ☐ Locate a specific eye size
- ☐ Customize plano Ray-Bans/Oakley
- ☐ Process Insurance order (must be in two separate transactions)

*Smart Shopper is to compliment your frame assortment when a patient can't find a style they like in the office. Best practice is to always sell what you have in the office!*

***Bonus Activities:*** Check out the Consultative Selling Guide in the Toolkit!

| Actions to Observe                                                                                                                           | YES | NO |
|----------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| Did the team member celebrate the new digital measuring tool?                                                                                |     |    |
| When possible, did the team member remove the demo lenses for an accurate picture? (sun and clear)                                           |     |    |
| Did the team member adjust the frame accordingly ? (Straight, not twisted, nose pads adjusted, slide down, etc.)                             |     |    |
| Did the team member place the sensor on the eyewear with ease?                                                                               |     |    |
| Did the team member check the placement of the glasses on the customer? i.e., checked, asked if the glasses were in the correct positioning? |     |    |
| Was each step of the process explained to you? Are we confident in explaining NVB measurements and how it impacts the lens?                  |     |    |
| Was the iPad screen shown during the measurement process?                                                                                    |     |    |
| Was the process seamless? Or did it look like the team member had doubts over the process?                                                   |     |    |

## Notes

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

# WELLNESS & TENDERING

## Ciao! Optical



[RETURN TO TABLE OF CONTENTS](#)

### Accessory/ Wellness Products:

*Note: co-management is processed the same way*

- ❑ Look up SKU
- ❑ Attach Provider

### Frame Only:

- ☐ Look up a frame SKU
- ☐ Attach Provider
- ☐ Add EPP

**Tender:**

- ☐ Review XStore and navigate to/from Ciao active orders
- ☐ Add discounts:
  - Service Recon
  - Manager Discretion
  - Complimentary Cleaner
  - Others
- ☐ Add Express Shipping to a contact lens order
- ☐ Change Associate in XStore
- ☐ Tender a glasses order (cash pay/zero out first and return same day if test order)
  - Review what prints where and what paperwork is expected to print
  - Review that cash or check (or zero) will not print a Ciao store copy receipt
  - Review to print and email receipts for all patients when possible
- ☐ Review information need from Ciao & Finix Credit Card Machine
  - Credit Card
  - HSA or FSA
  - Check
  - Care Credit

## Notes

[illegible]





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 you 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](mailto:TeamVision@luxotticaretail.com) if you need to check the status of your eyewear or have questions about RxO cancellations. 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 3<sup>rd</sup> day, you can email your tracking number to email [Luxproductgroup@luxotticaretail.com](mailto: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 notate 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](#)

Use the Patient Journey on the previous page, Google Classroom, RevolutionEHR Practice & Training, and Toolkit Documents to complete the following activities:

## Notes

### Eyeglasses:

- ❑ Transmit orders in LPA that will go to RxO (no edits)
- ❑ Transmit orders in LPA that will go to RxO but need to be edited
- ❑ Transmit orders in LPA that will go to Insurance Lab (VSP, Spectera, Superior)
- ❑ Practice how to submit an order in Custom Eyes
- ❑ Transmit orders in LPA that will go to Custom Eyes
- ❑ Review key Tabs in Order Tracker
- ❑ Review Frame to Come Process – green tag on frame and green label on box
- ❑ Review where in Order Tracker Lab and Order information is found and shipping addresses (confirm Suite 200 has been listed for Atlanta)
- ❑ Review in EasyShip how to print lab shipping labels for RxO (3 labs)
- ❑ Review RxO Escalation Process (where to get the information for email)

## Contacts:

- ❑ Order trials for a patient
- ❑ Order trials for site stock
- ❑ Review how to track/ log delays from NOV Contact Lenses
- ❑ Review how to order specialty contact lenses through Service Center/Vendor
- ❑ Review in Toolkit >Documents> Contact Lenses> Pricing & Guides> CL Handbook

[illegible]



Use the Patient Journey on the previous page, Google Classroom, RevolutionEHR Practice & Training, and Toolkit Documents to complete the following activities:

### Notes

- ☐ Review how to enter Order Inspection in LPA
- ☐ Review how to re-order if inspection failed and code re-order correctly
- ☐ Review the difference between re-order in LPA & Ciao! Remake/Exchange
- ☐ Ensure LPA jobs have been transmitted or cleared
- ☐ Review how to notify a patient in Order Tracker when their order is ready
- ☐ Review how to dispense order in Order Tracker
- ☐ Remind team they cannot dispense orders in Order Tracker until they have been closed in LPA (close out all lab paperwork for the day prior to dispense paperwork)
- ☐ Review in Documents where to find the info

**Bonus Activities:** Pull up the patients EyeRuler2 image and review for accuracy with the optician.

Review with the selling optician how you might leverage Lens Simulator at dispense!

# AFTER THE SALE

Ciao! Optical

**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

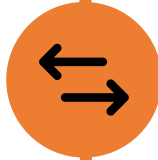
The EPP is process as an exchange but move to the Active Order list for you to complete the transaction in XStore.

*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**.



Use the Patient Journey on the previous page, Google Classroom, RevolutionEHR Practice & Training, and Toolkit Documents to complete the following activities:

### Notes

#### Remakes/Returns:

- ☐ Review Purchase History in Ciao!  
(use above test order)
- ☐ Review how to find Eyewear  
Analysis From in Toolkit and how to  
find order details in Ciao! Customer  
Order
- ☐ Remake the glasses and change  
frame/lens (pull all the way to  
Xstore but do not tender)
  - Review how Ciao will calculate  
price difference and policy
  - Cancel remake so not on Active  
Order List
- ☐ Pull order back up and add an EPP  
(at pick up)
  - Cancel remake/add EPP so not  
on Active Order List
- ☐ Pull order back up and add an ATF  
discount/charge
  - Cancel remake/ATF so not on  
Active Order List
- ☐ Pull order back up and return the  
order and review paperwork (sign)
- ☐ Change a form of payment
- ☐ Review what a Phantom Order is
  - Review how to complete a No  
Receipt Return
- ☐ Review Toolkit >Documents>  
Entering Orders > Return and  
Exchanges
- ☐ Find your Frame Recovery Box
- ☐ APM/PM/LM: Walk through the  
Frame Recovery/Disposition  
process
- ☐ Review RTFT reporting from Toolkit

# OFFICE OPERATIONS

## PM & Key Leaders



### Navigate Ciao! Back Office:

- ☐ Edit team member access in Associate Maintenance for team
- ☐ Review the differences in Electronic Journal and Electronic Report
- ☐ Reprint a receipt

### Assets Protection:

- ☐ Deposit old cash drawer funds and ensure correct change/amounts for new funds (\$400)
- ☐ Set up safe – follow instructions on front of safe
- ☐ Set up bank log (binder)
- ☐ Safety and other CP items to be set aside and team aware that more items coming and to add to this box (TVO partner to set up 2-4 weeks post conversion)
- ☐ Print Key Holder Agreements for needed team members or doctors
- ☐ Review Credit Card Policy and order logs (keep log and card in safe)

### Communication:

- ☐ Review how TeamVision email is set up and how to access mailboxes + addresses
- ☐ Where to find email accounts for all TeamVision (and TVO)
- ☐ Reporting in Toolkit (TeamVision KPIs)
- ☐ Operational Calendar (shared in Comms)
- ☐ Learn about office Hours

### Toolkit > Documents:

- ☐ Review pages 1-3
- ☐ Dig into Documents
  - Ciao!
  - Pricing & Promotions
  - Lab (Order Management)
  - Contact Lenses
  - Inventory Management
  - Who to call list





### Site Maintenance:

- ☐ Enter in Maintenance Portal a request for InstaKey
- ☐ Request for additional keys now if needed
- ☐ Review how to enter other requests:
  - OD Instrument Maintenance
  - General Repairs
  - Other Requests

### Inventory Management:

- ☐ Place a CP order and review what is still pending (partner with Ops Manager on pending)
- ☐ Show how to complete an inventory adjustment
- ☐ Show how to complete an in-store damage (i.e. for CL revenue expired or opened boxes)
- ☐ Show how to confirm shipments and what to do if counts don't match
- ☐ Show how to scan and reprint a frame tag using the Zebra printer
- ☐ Show how to look up a SKU for a frame with a missing tag
- ☐ Show how to complete monthly (min of once/month) frame disposition

### Order Supplies:

- ☐ Office Depot
- ☐ UPS Supplies

### Kronos:

- ☐ View punches
- ☐ Request/Approve a change in punches
- ☐ Approve your timecard
- ☐ Submit a PTO request
- ☐ Look up accruals (PTO & Holiday)
- ☐ Manual entry of PTO, Bereavement, Covid, ETC.
- ☐ PM: Submit payroll & edit timecard
- ☐ PM: Publish a Schedule
- ☐ PM: Review, approve, deny Time Off Requests