

Welcome to TeamVision!

TRAINING OVERVIEW T176-T178



Pre Integration					
Integration Week					
Integration Week	Monday	Tuesday	Wednesday	Thursday	Friday
Team Members Managers, Patient Care Coordinators, Optical, Technicians, Lab, etc.	Frame Tagging and Physical Inventory (PI)	Welcome & Overview of Systems and Patient Journey RevolutionEHR Ciao! Basics- Services & Material Ordering EyeRuler 2+ Ciao! Optical Orders	Insurance Tender Ciao! After the Sale Training Checklist Order & Inventory Management Patient Journey Training Checklists	AM: Ops Walkthrough Patient Prep Set Optical Dispensary (Visual Merchandising)	Patient Care (8:45-1pm) <ul style="list-style-type: none">12:00pm last patient scheduled1 patient & 1 check per hour per ODConsider staggering appointments After Lunch: Practice
Doctors	Recommended	Attend Training	Attend Training	Attend Training	Soft Open
CLOSED FOR BUSINESS: Hardware & Software Install					Soft Open
Post Integration					
In office post support team members & virtual learning with training & ops					

SCHEDULE OVERVIEW T176-T178



Integration Week	Monday 11/10	Tuesday 11/11	Wednesday 11/12	Thursday 11/13	Friday 11/14
T176 Hiawassee	Inventory All Staff in Home Site	Training Day 1 In Hiawassee	Training Day 2 In Hiawassee	AM- Training Day 3 in Hiawassee PM- Walk Through, Patient Journey All Staff in Home Site	Soft Open Limited hours and patients
T177 Bairsville		Training Day 1 In Hiawassee	Training Day 2 In Hiawassee	AM- Training Day 3 in Hiawassee PM- Walk Through, Patient Journey All Staff in Home Site	
T178 Clayton		Training Day 1 In Hiawassee	Training Day 2 In Hiawassee	AM- Training Day 3 in Hiawassee PM- Walk Through, Patient Journey All Staff in Home Site	
Scheduled Hours	8am-5pm* *must complete Inventory activities prior to end of day	9am-5:30pm (be in training site by 9am – will leave early for those driving)	9am-5:30pm (be in training site by 9am – will leave early for those driving)	9am-5:30pm (be in training site by 9am – will leave early for those driving)	8:30am-2pm
Practice Hours	Closed for Patient Care				Soft Open 8:45am-1pm* Limited hours and patients

Carpool when possible. Reach out to Diana or Training team should travel concerns arise.

CHANGE MANAGEMENT

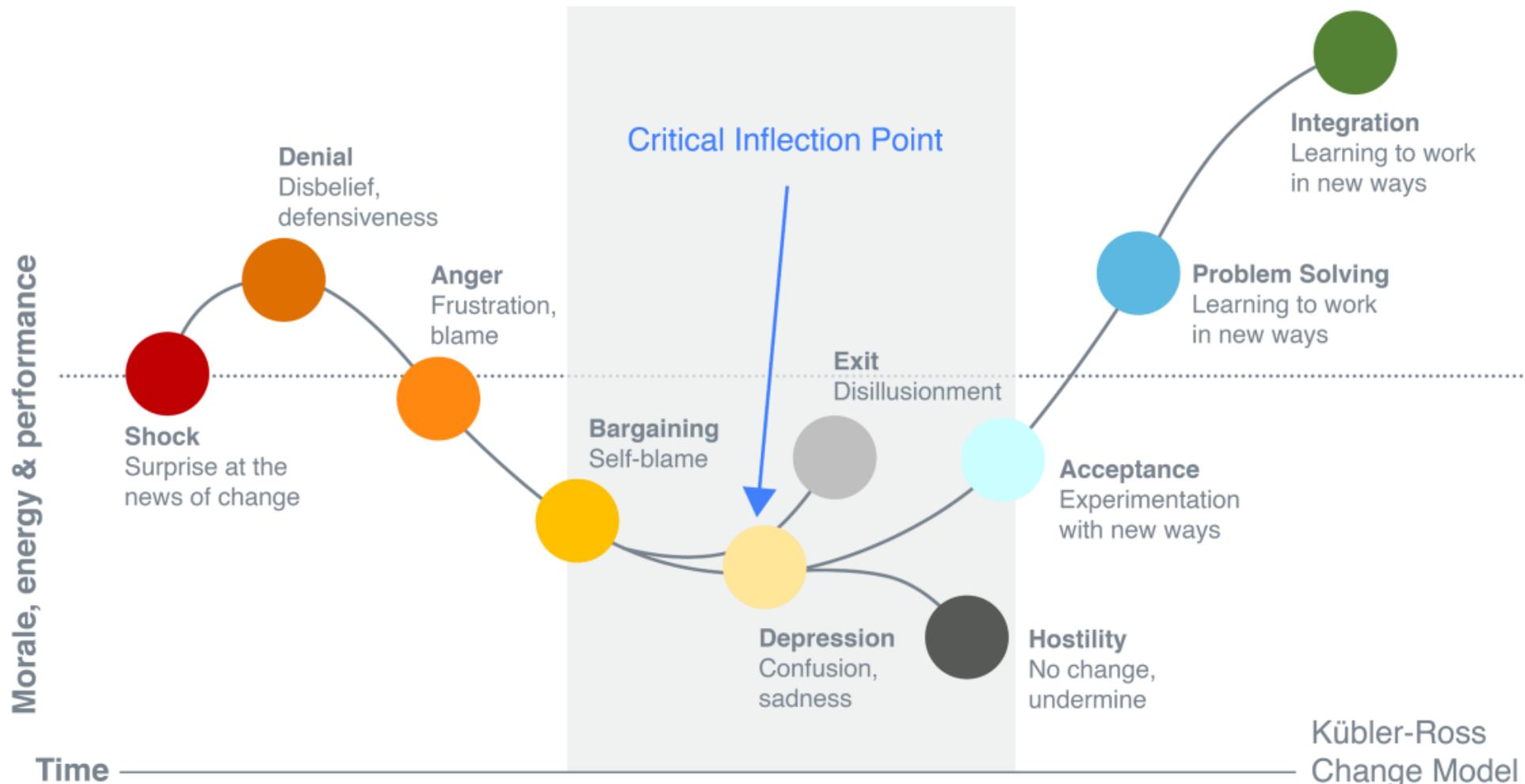
What changes have you already been through?

What changes do you anticipate?

Change can be energizing or exhausting, change can also bring opportunity!



THE CHANGE CURVE



At the critical inflection point of the change process you can either accept and learn from the change, exit out, or fight back

WHATS TO COME?

You May Experience:

- Password/login delays
- Systems down
- Boxes & trash
- People in & out of the office

Thank you for your patience!!





ESSILORLUXOTTICA VALUES



We Are Pioneers
Bringing heritage
into the future



We Are One
Thanks to
many



We Are Agile
Making the
complex simple



We Are Passionate
Turning inspiration
into impact



We Care
Close to all, no
matter how far

WHO IS TEAMVISION?

TeamVision is an innovative **partnership** of private practices and industry leaders focused on **building an elite eye care network** and delivering an unmatched patient-centered eye care experience.



WHO IS TEAMVISION?

140+ Locations:

- Alabama
- Florida
- Canada
- Illinois
- Rhode Island
- New York
- New Jersey
- North Carolina
- South Carolina
- Georgia
- Missouri
- Washington
- Colorado
- Arizona
- California



WHO IS TEAMVISION?



Medical and Vision Therapy



Cataract & Laser Surgery



Optical Dispensaries

BEST PRODUCTS FOR OUR PATIENTS

As the world continues to evolve, so do we. We're updating our products to stay aligned with current needs and advancements. The key question for us now is: Are we making sure our **patients** are receiving the **best** possible **products** for their individual needs?



DOCTOR SERVICES

Doctor Services will align with TeamVision offices

- Integrated into RevolutionEHR
- All services and products are tendered in Ciao! Optical



CONTACT LENSES

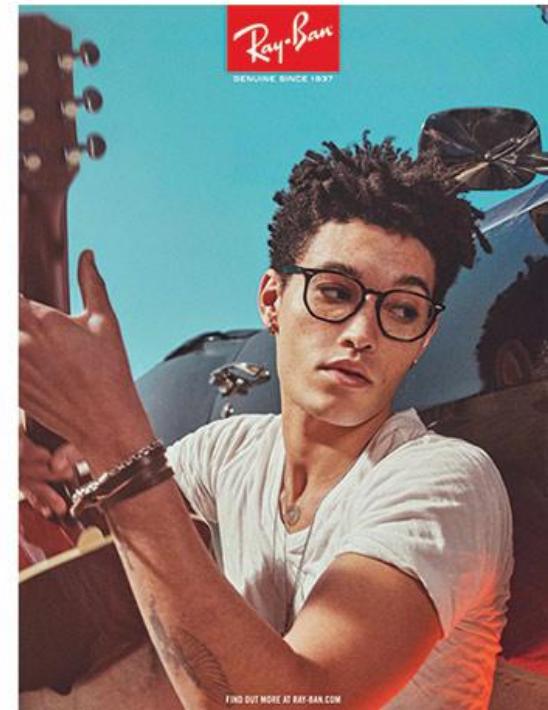
	CL VENDOR	ORDERING CAPABILITY
Soft CL Only	Alcon	PC will receive access to this Vendor's CL catalogue; orders placed via Ciao! Optical POS
	Vistakon	
	B&L	
	Cooper	
	MiSight	
Specialty CL	Essilor	PC will receive access to this Vendor's CL catalogue; orders placed via phone direct to vendor.
	Art Optical	
	ABB Optical	
	X-Cel Contacts	
	Synergeyes	PC will receive access to this Vendor's CL catalogue; orders placed via phone direct to vendor.
	Blanchard	
	GP Specialists	
	SpecialEyes	
	Alden (B&L)	
	Natural Vue OOGP	If PC fits Natural Vue for Myopia Management , we can set up an account; orders placed via OOGP Portal.
	Euclid	If PC fits Euclid AND prescribing OD has a Euclid certification , we can set up an account; orders placed via phone direct to vendor.
	Paragon CRT	If PC fits Paragon CRT AND prescribing OD has a Paragon CRT certification , we can set up an account; orders placed via phone direct to vendor.

- Orders integrated into Ciao! Optical
- Disposable (soft) ship direct to patient or office at no charge
- Transparent pricing, hassle-free experience with instant savings (no rebates)

FRAME ASSORTMENT

Frame assortments are carefully selected by specialized global brand category managers.

New brands are added and removed periodically to guarantee a constantly improving and relevant offering.



GOLD SEGMENTATION (900 Facings)



LUXURY

Burberry
Gucci*
Prada*
Prada Linea Rossa
Silhouette
Tiffany*
Versace*

PREMIUM

Coach*
Emporio Armani
Kate Spade
Lacoste
Michael Kors*
Polo
Polo Prep
Swarovski
Tory Burch

FAST FASHION

Armani Exchange
Bebe
Flexon
Miraflex
Nine West
Ralph*
Sferoflex
Vogue

LIFESTYLE

Ray-Ban*
SPORT
Costa Sun
Oakley*

KIDS

Miraflex
Oakley Jr
Polo Prep
Ray Ban Jr*
Vogue Jr

SAFETY

Liberty
On Guard

*Includes Sun

VISUAL MERCHANDISING

1

Clutter Free Shelves

- Remove wall props

2

Shelves Dusted

3

Lenses Cleaned

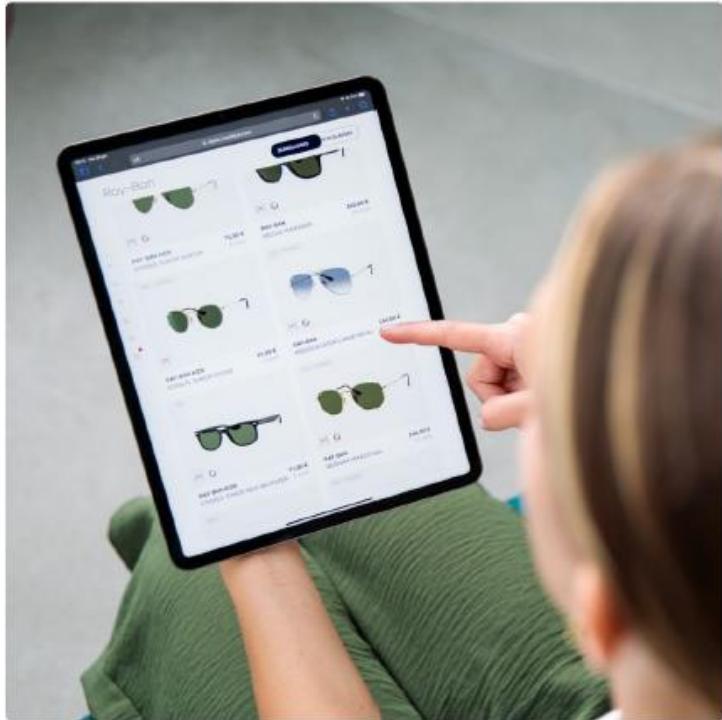
4

Marketing Set

- TeamVision promotions
- Review Toolkit Guidelines



SMART SHOPPER



INFINITE CATALOG



CUSTOMIZATION



VIRTUAL TRY-ON

LENS ASSORTMENT

- Essilor Lenses including Varilux, Eyezen, Transitions, and Crizal
- Authentic brands including Ray-Ban, Oakley, and Costa Del Mar
- Discontinue using all prior labs or lenses, exceptions will be:
 - VisionWeb/CustomEyes available for high Rx, Prism, specialty bi-focal



LAB LOCATIONS

Lab Locations (T176 & T177)

- Complete pairs from RxO
- Send frame to RxO
- Order uncut lenses & edge in house
- Cut & Edge

Non-Lab Location (T178)

- Complete pairs from RxO
- Send frame to RxO
- Cut & Edge



ACCESSORIES

Available conversion week and replenished automatically:

- 2 oz, Lens Sanitizer - \$6
- Microfiber Cloth - \$6
- Lens Wipes - \$4.99
- Care Kit (2 oz Sanitizer, Cloth, & Mini-Screwdriver) - \$11.99



WARRANTY

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.

- We stand behind our product and will replace any defective lenses or frames.
- Doctor Prescription Exchanges (90 Days)
- Cataract Surgery Exchanges (6 Months)



EYEWEAR PROTECTION PLAN

Eyewear Protection Plan (EPP)

- We do not participate in vendor guarantees
- Replacement eyewear (covers broken frames, scratched lenses)
- Unlimited use
- Powered by Asurion
- Documents in Toolkit & CP



EYEWEAR PROTECTION PLAN

Order Type	Time of sale	Redemption
Complete pair SV	\$35	\$35
Complete pair PG	\$45	\$35
Frame only	\$35	\$25
Lens only SV	\$35	\$25
Lens only PG	\$45	\$25

We will honor your current patient's guarantees!

- Will be processed through RxO
- Restyle patients, enter in Ciao! and discount as needed
- If you can replace through previous vendor at no charge- you can do so



PROMOTIONS

- **Limited Time Offers**
- **First Pairs**
- **Additional Pairs**
- **Value Packages**
- **Employee Discounts**



EMPLOYEE DISCOUNTS

- Annual & Milestone Eyewear Certificate (Anniversary Month)
- Friends of EssilorLuxottica Certificates (December)
- Everyday Eyewear Discounts
- Contact Lens Discounts
- Invites for Special Promotions



DIGITAL MARKETING CAMPAIGNS

Digital Marketing Campaigns connect patients to your practice and supports an ongoing relationship as their trusted provider.

By capturing all patients' emails, you can directly support patient retention through exam growth and foot traffic.



DIGITAL MARKETING CAMPAIGNS



We Miss You Campaign (Reactivation)

Re-connect with patients who haven't visited us in the past 18 months.

Patient will receive bonus savings on their next purchase as a welcome back gift!



Happy Birthday Campaign

To celebrate our patients' birthdays, we are offering a 25% Off Non-Rx Sun purchase made during their birthday month.



Patient Referral Campaign

Encourage patients to refer their friends and family to your practice.

Both the referrer and the new patient will receive a discount on their next purchase!

Follow up with your field leader post integration!

GOOGLE REVIEWS

How can Google Reviews drive your business?

Up to 84% of consumers use online reviews when selecting a healthcare provider.

Why is it important to ask for a Google Reviews?

The more positive reviews you have, the higher your business appears in local search results and Google Maps, giving you a competitive edge!

Regardless of your score, implement a strategy to increase monthly by .1% until you're 5 Stars!



Goal: +4.7 ★ ★ ★ ★ ★

TOOLS & RESOURCES

LENS PORTFOLIO GUIDE

Click on names below to see pricing and enhancement details. September 2024

Single Vision	Progressive	Other Lenses
<ul style="list-style-type: none"> Eyezen® Start™ Eyezen® 4+ Eyezen® Kids Digital (GST) Conventional Sun 	<ul style="list-style-type: none"> Vorilux® XR Track Fit™ Vorilux® XR Fit™ Vorilux® Comfort Max Fit Premium Progressive Computer Sun 	<ul style="list-style-type: none"> Bifocal Trifocal Slab Off Wrap

RAY-BAN® AUTHENTIC LENSES

- Clear
- Sun

OAKLEY® AUTHENTIC LENSES

- Clear
- Sun

Enhancements

- Transitions®
- Crizal®
- Lens Power Ranges
- Insurance Classifications
- Frame Power Ranges

LENS SIMULATOR



CONTACT LENS PRICE CARD

July 2024

Select a collection below for additional price card details

MODALITY	Sphere	Toric	MultiFocal	INSTANT SAVINGS
Acuvue® Daily*	2 Weeks	✓	✓	\$30
1-Day Acuvue® Oasys®	Daily Disposable	✓	✓	\$125
1-Day Acuvue® Moist	Daily Disposable	✓	✓	\$100
Acuvue® Oasys® Multifocal	Daily Disposable	✓	✓	\$125
Acuvue® Vitz®	Monthly	✓	✓	\$30
DALELS® Total 1®	Daily Disposable	✓	✓	\$150
Precision®	Daily Disposable	✓	✓	\$125
DALELS® Aquacomfort Plus®	Daily Disposable	✓	✓	\$75
Air Optix®	Monthly	✓	✓	Up to \$30
Total30®	Monthly	✓		\$50
cooperVision®				
clarifit® 1-DAY	Daily Disposable	✓	✓	\$100
Blifit®	Monthly	✓	✓	\$30
MyDots®	Daily Disposable	✓	✓	\$100
BAUSCH + LOMB				
BioTrue ONEday®	Daily Disposable	✓	✓	\$100
INFUSE®	Daily Disposable	✓		\$175
Ultra® with Moisture Seal	Monthly	✓	✓	\$30

*Not included in our most popular contact lenses

Contact Lens Price Book

The Contact Lens Price Book, additional contact lenses and prices

TeamVision

PROMOTIONS CARD

July 2024 - US

LIMITED TIME OFFERS: 7/15-8/2

KIDS BT3 OFFER DETAILS

- IB and Under: Save up to \$125.95 with 3V comic poly lens with premium All Day or Night fit.
- Upgrade to digital with Crizal® Easy Fit or Crizal® Soppreme HR AR for +\$80.
- Crizal® lenses with Crizal® Rock All Day or Crizal® Soppreme HR AR for +\$80.
- Frame upgrades available for digital lenses over \$129.95.
- Offer will Autofire
- The previous kids 50% off promotion (if it is still active) will be included in the BT3 package and Crizal will Autofire with the best offer for your patient.

KIDS 50% OFF Complete Pair

40% OFF Additional Complete Pairs

40% OFF Additional Pairs Lens Discount

20% OFF Additional Non-Rx Sun

CL Up to \$50 OFF Annual Supply

CL Up to \$50 OFF 6 Month Supply

Quick Code Reference

Promotion	Code
15% Off Lenses	AUTOFIRE
Kids 50% Off Complete Pair	AUTOFIRE
40% Off Additional Complete Pairs	750093
40% Off Additional Pairs Lens Discount	MANUAL
20% Off Additional Non-Rx Sun	MANUAL
CL Up to \$50 Off Annual Supply	AUTOFIRE or MANUAL 18740
CL Up to \$50 Off 6 Month Supply	AUTOFIRE or MANUAL 18740
Designer Sale	MANUAL 180470
Professional Package Starting at \$99.95 or \$99.99 Progressive	MANUAL 187407
20% Off Pairs	MANUAL 750097
MJ Second Pair	MANUAL 187408
Complimentary Cleaner	DISCOUNT 750598

Frame exclusions include: Carter, Chanel, Ferrari, Jimmy Choo, Oliver Peoples, Persol, Prada, Prada Linea Rossa, Ray-Ban Change, Ray-Ban Metal, and Ray-Ban Reverse.

See details found in this guide for full details and Manager Discretion and Employee Discount Codes.

SELLING APPROACH

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.



**Patient
Centric**



**Trusted
Advisor**



**Understand
Patient Needs**



**Tailored
Recommendations**

CONSULTATIVE SELLING

LEARN

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.

LISTEN

Active listening is a superpower in sales. When you listen with empathy, you uncover insights that guide your sales approach.

LEAD

Leading with a single recommendation aligned to what the patient shared and our preferred products. Create value and simplify the decision process for your patient. If budget is a concern, transition to the next option that still meets needs and provides the benefits they need their lifestyle.



CONSULTATIVE SELLING | PATIENT QUESTIONNAIRE

PATIENT QUESTIONNAIRE			TeamVision
	Never	Some	Often
Do you have trouble changing your focus from near to far, or vice versa?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you spend time outside or driving?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you spend time in front of screens (phone, tablet, Kindle, TV, computer)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you notice sensitivity to bright lights, glare, or fluorescent lighting?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you wear sunglasses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you wear contact lenses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have problems seeing with your current eyewear and/or contact lenses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
What do you love about your current eyewear?	Current Prescriptions (Actively Wearing)		
What would you change?	Current Len Design & Features		
Are you interested in eye surgery (Lasik, other)?			
Any other concerns you would like to discuss today regarding your vision, eye health, or eyewear needs?			
Live Consult			
PATIENT QUESTIONNAIRE			
	Never	Some	Often
Do you have trouble changing your focus from near to far, or vice versa?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you spend time outside or driving?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you spend time in front of screens (phone, tablet, Kindle, TV, computer)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you notice sensitivity to bright lights, glare, or fluorescent lighting?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you wear sunglasses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you wear contact lenses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have problems seeing with your current eyewear and/or contact lenses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you wish your glasses were:			
Thinner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lighter Weight	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More Durable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More Scratch Resistant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you interested in eye surgery (Lasik, other)?			
Any other concerns you would like to discuss today regarding your vision, eye health, or eyewear needs?			
Patient Provided			

PATIENT QUESTIONNAIRE | LIVE CONSULT

What do these questions tell us?

How would you use this information when consulting with the patient?

	Never	Some	Often
Do you have trouble changing your focus from near to far, or vice versa?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you spend time outside or driving?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you spend time in front of screens (phone, tablet, Kindle, TV, computer)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you notice sensitivity to bright lights, glare, or fluorescent lighting?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you wear sunglasses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you wear contact lenses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have problems seeing with your current eyewear and/or contact lenses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PATIENT QUESTIONNAIRE | LIVE CONSULT

How would you best leverage this section?

Additional insight to patient's goals and pain points.

What do you love about your current eyewear?

What would you change?

Are you interested in eye surgery (Lasik, other)?

Any other concerns you would like to discuss today regarding your vision, eye health, or eyewear needs?

Current Prescriptions (Actively Wearing)

Current Len Design & Features

PATIENT QUESTIONNAIRE | TOUCHPOINTS



*Eyewear
Assessment*

Check In/Pre-Test

Front Desk or Tech Encounter



*Patient
Transition*

Inside the Lane

Doctor Encounter &
Assessment



Check Out

Front Desk or Optical

SCENARIO | PATIENT QUESTIONNAIRE

How do you take this information and turn this into a conversation and recommendations?

Based on what you see here what additional open-ended questions do you ask your patient?

What products would you recommend for this patient?

Do you have trouble changing your focus from near to far, or vice versa?

Do you spend time outside or driving?

Do you spend time in front of screens (phone, tablet, Kindle, TV, computer)?

Do you notice sensitivity to bright lights, glare, or fluorescent lighting? *Especially at night*

Do you wear sunglasses?

Do you wear contact lenses?

Do you have problems seeing with your current eyewear and/or contact lenses?

Never Some Often

Never Some Often

Never Some Often

SCENARIO | PATIENT QUESTIONNAIRE

What products would you recommend for this patient?

How would you present the patient with these recommendations?

What do you love about your current eyewear?

They are comfortable

What would you change?

Lenses are a little scratched and feel blurry at end of day

Are you interested in eye surgery (Lasik, other)?

No

Any other concerns you would like to discuss today regarding your vision, eye health, or eyewear needs?

My eyes have been watering a lot

Current Prescriptions (Actively Wearing)

-2.00 OU +2 Add
2022 RX

Current Len Design & Features

varilux x Poly
Transitions Grey
Crizal Rock

LENS PORTFOLIO

Single Vision

Progressive

No Glare

Light Filtering

Preferred

Doctor recommended;
patient preferred

Eyezen®

Varilux®
XR series™

Crizal®
Sapphire™
Crizal®
Prevencia™
Crizal®
Rock™

Transitions®

Classic

Tried and true design to
meet your needs

DST

Varilux®
Comfort Max

Crizal®
Easy™^{Pro}

Transitions®

Essential

Baseline choice to meet
basic requirements

Conventional

Premium
(Accolade)

Premium AR

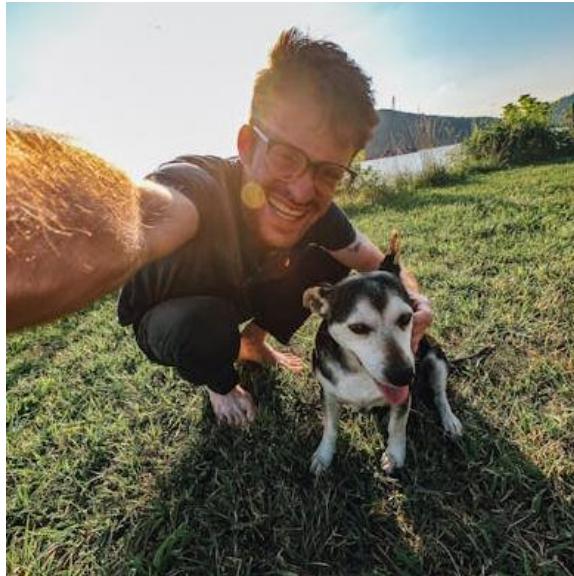
Transitions®

MULTIPLES | PATIENT NEEDS



Vision Need (Lenses)

How many different lenses would they benefit from?



Practical Need

What glasses you would need for different activities or locations?



Style Need

How many different styles would they benefit from?

PATIENT TRANSITION

What does your Patient Transition look like today?

How does the patient benefit?

How does the optician benefit?



SEEMLESS TRANSITION

Doctor Transition:

Mrs. Smith, based on what you have shared with me and your new Rx, I'm recommending a Crizal Saphire HR lens that will help your eyes feel less exhausted at the end of the day.

Another feature of your lenses will be Transitions Lenses technology. They will change from clear to dark when you go outside, so you don't have to worry about losing your clip-ons and turning your hand into a sun visor. This will reduce your exposure, both inside and outside, to harmful blue light.

Additionally, the Varilux XR Fit progressive no-line lenses will make your learning period more comfortable and ultimately more successful, so they don't end up in the drawer like last time. This feature will allow you to see your cell phone, computer and the road more comfortably, so your eyes won't be working so hard throughout the day.

Optical Team Member:

Thank you so much Doctor, Mrs. Smith it sounds like your exam went well and the Doctor has recommended some great product. Our patients prefer both the Crizal Saphire HR lenses and Transitions especially paired with our best progressive lens, the Varilux XR Fit.

Let me share with you the benefits and how it will help you in all parts of your life. Let's continue our conversation so I can ensure I'm understanding all of your needs today!

SYSTEMS OVERVIEW

Workstations:

- Dell Computers
- Ciao! Optical Desktops
- Ciao! Optical iPads
- Ciao! Printers
- XStore

Scroll lock twice to navigate between computers when available.

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



PATIENT COMMUNICATION

New Phone Systems

- 8 rings until Voicemail picks up
- Casey will provide overview

4PC Launching Late August

- Patient communication platform
- Appointment Reminders
- Digital Marketing Campaign



KRONOS

Time Keeping System Review

Review:

Can everyone access?

Can everyone clock in/out?

Can everyone find the daily time-card review?

PTO process.

OD's on Extensis



TEAMVISION EMAILS

YourELID@essilorluxottica.id

YourCID.Ext@teamvisionteam.com

DrName@teamvisionteam.com



CIAO! TOOLKIT

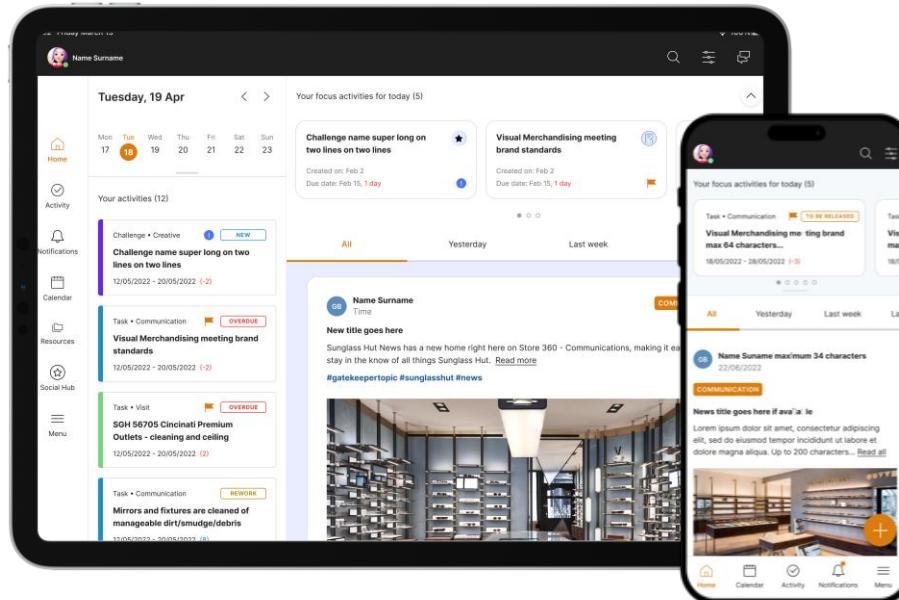
Let's explore Toolkit

- Pages
- Applications
- Document Folder

Toolkit Bingo – first group to black out their card wins!



Digital workplace to enhance stores' management **efficiency** by streamlining **tasks*** and enabling broadcast **communications, store visits** and the **picture collection process**.



COMMUNICATION

Assign tasks and news to stores, monitoring the execution

PICTURE MANAGEMENT

Picture collection and publication through dedicated VM approval process

STORE VISIT TOOL

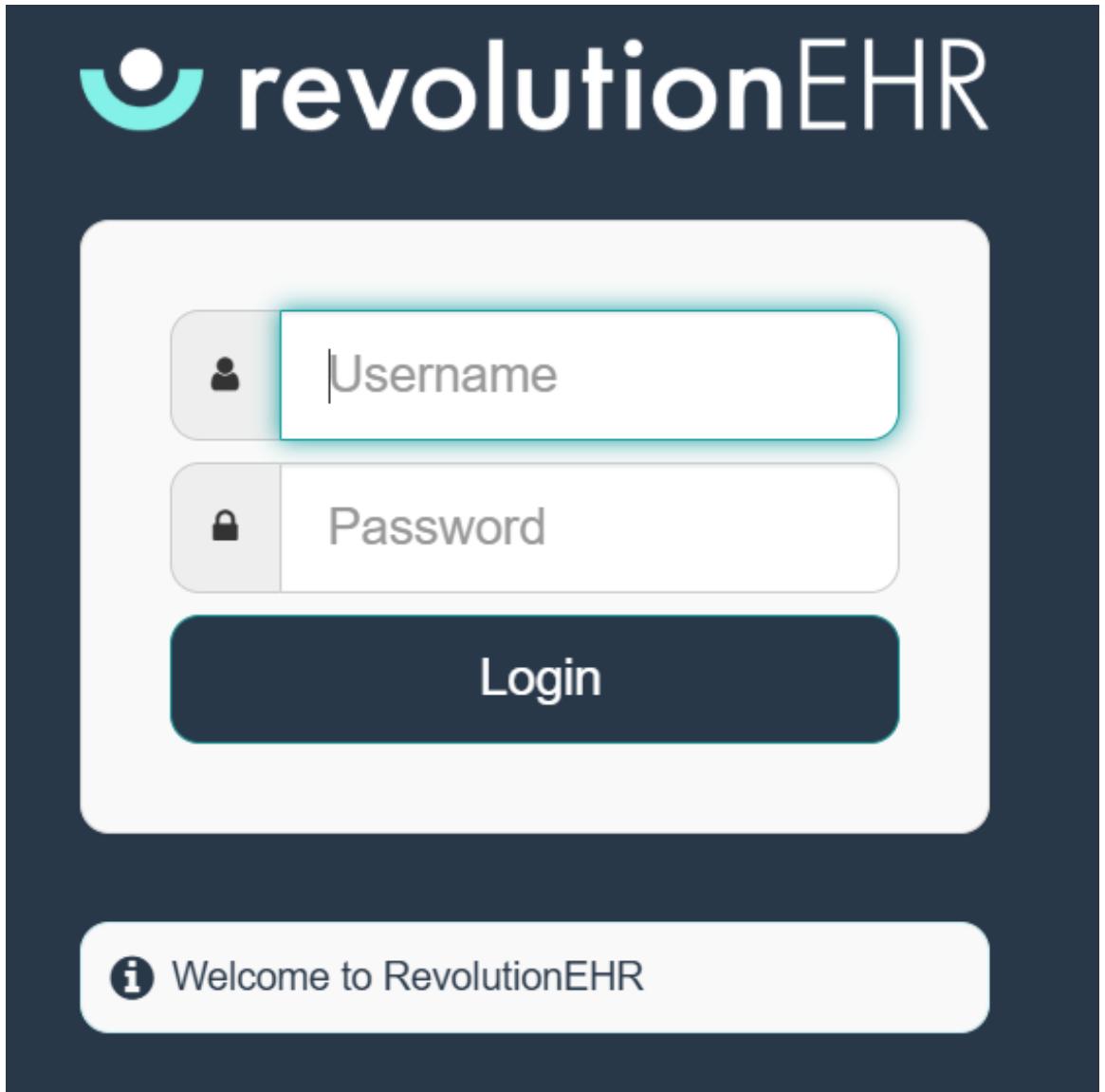
Planning and executing visits in store with dedicated surveys and task assignment

Additional features : Resources, Calendar, Activities, Notifications and more!

RevolutionEHR

- New login for TeamVision Environment
- You can still access your current Rev Environment
- After 8/4- all new appointments & encounters go into the TeamVision Rev
- Similar functionality

Shared environment = changes you make impacts other offices!!!



DATA EXTRACTION OVERVIEW

ETA 2-3 weeks

Item	Rev	Ciao!	Notes
Patient Demographics	✓	✓	<ul style="list-style-type: none">Always check Ciao! DOBDefault is 1-1-2000
Schedules	✓	✗	<ul style="list-style-type: none">Clean up and adjust
Insurance information	✓	✗	<ul style="list-style-type: none">Confirm
Clinical Data	✓	✗	<ul style="list-style-type: none">EMR medical notes exported as PDF's
Custom Tabs & Gen Fields	✓	✗	<ul style="list-style-type: none">Any fields from Gen 1, Gen 2, and custom tabs configured in your system
Documents & History	✓	✗	<ul style="list-style-type: none">Items from the History tab and scanned uploaded /documents
Financial/ledger Information	✗	✗	<ul style="list-style-type: none">Use Nextech link
OD preferences/settings	✗	✗	<ul style="list-style-type: none">Set up service triggers
Purchase history	✓	✗	<ul style="list-style-type: none">PDF in Documents

FILL THE BOOKS OVERVIEW

- Identify your Top 3
- Post your No-Show Sign for Launch
- Partner with OD & game plan
- Implement your plan

Measure Success with Fill Rate & Completed Exams



Your No Show-Late Fee process should be in place approx. 90 days post integration

NO SHOW-LATE FEES | COMMUNICATION



Phone Confirmation



Digital Communication



In Office-Check In

CONFIRMATION PROCESS

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

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

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



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

NO SHOW-LATE FEES | STRATEGY

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

Best Practices: Wait 15 mins past appointment- giving the patient time to arrive.	
Once 15 minutes have passed:	<ol style="list-style-type: none">1. Call patient to reschedule.2. When leaving voicemail, mark as a no show.<ul style="list-style-type: none">• This will help accurate reporting so we can follow up with patients
MARK YOUR NO SHOW's (MISSED APPOINTMENTS)	

- 10% or less is average (aim for 5%)
- Every location should have a clear strategy in place for following up with patients who don't show up for their appointment (may vary by practice group).

NO SHOW-LATE FEES | COLLECTION



- **Waiving Fees**– your office should have a standardize practice for all patients, partner with your site Leaders & OD's to align on your process and when exceptions should be made.
- Some flexibility over the first 30 days-we don't want to deter patients from coming to our office.

NO SHOW-LATE FEES | COLLECTION

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

TAKE ACTION:

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

Invoice Receipt
Customer Copy

Jennifer Morgan
240 Pond Road
Raeford NC 28376

Invoice Number: IN176358
Receipt Date: 08/27/24
Provider:
Office Phone:
Clinic Tax ID:
Chart Number: PT1179909

Next Scheduled Appointment: None

Charges

Date	Qty	Description	CPT	Diagnosis	Fee	Insurance	Patient
	1	No Show Fee			\$ 50.00	\$ 0.00	\$ 50.00

Total Current Charges **\$ 50.00** **\$ 0.00** **\$ 50.00**

Payments

Date	Location	Description	Invoice Line Item	Patient
		No Patient Payments		

Initial Invoice Balance **\$0.00**
Prior Balance Due **\$0.00**
Total Payment **\$0.00**

Total Balance Due **\$0.00**

Patient Statement
Page 1

Triangle Visions - Lumberton
750 Oakridge Blvd
Lumberton, NC 28358-2324

Morgan, Jennifer
240 Pond Road
Raeford, NC, 28376

Statement Date	08/27/2024
Total Balance Due	\$50.00

IN176358 Details - Jennifer Morgan - Chart# PT1179909

Date of Service	Provider	Qty Description	Fee	Patient
8/27/2024		1. No Show Fee	\$50.00	\$50.00
		Sales Tax	\$0.00	\$0.00
		Total Fee (including Sales Tax)	\$50.00	\$50.00
		Patient Subtotal for Invoice# IN176358		\$50.00

Additional Information

Aging Balance	0-30 Days \$50.00	31-60 Days \$0.00	61-90 Days \$0.00	91-120 Days \$0.00	121+ Days \$0.00
---------------	--------------------------	--------------------------	--------------------------	---------------------------	-------------------------

Contact Us (910) 739-5645

Please fold here, detach and return this slip with your payment

Morgan, Jennifer
240 Pond Road,
Raeford, NC, 28376

Statement Date	08/27/2024
Balance Due	\$50.00

Triangle Visions - Lumberton
750 Oakridge Blvd
Lumberton, NC 28358-2324

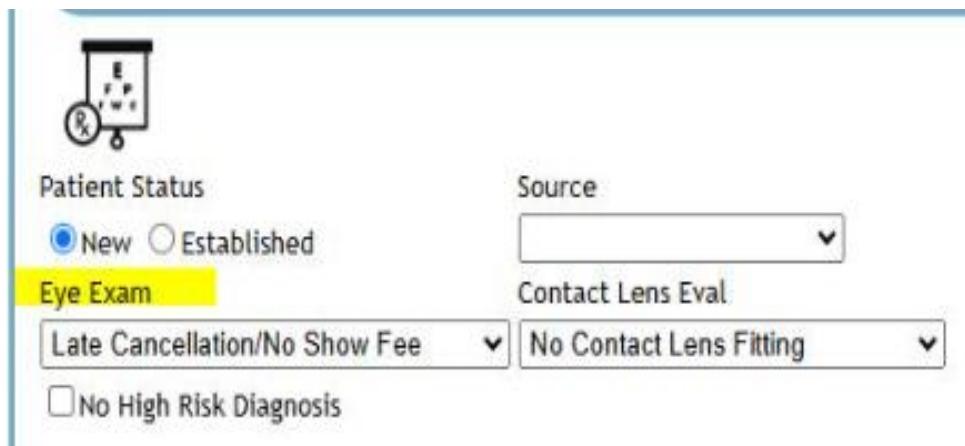
Payment Amount **\$**

Visa MC AMEX Disc
Card Number
Signature
Expiration / CVV

NO SHOW-LATE FEES | COLLECTION

PATIENT RECEIVES INVOICE:

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



Patient Status: New Established

Source:

Eye Exam: Eye Exam

Contact Lens Eval: Contact Lens Eval

Late Cancellation/No Show Fee: No Contact Lens Fitting

No High Risk Diagnosis

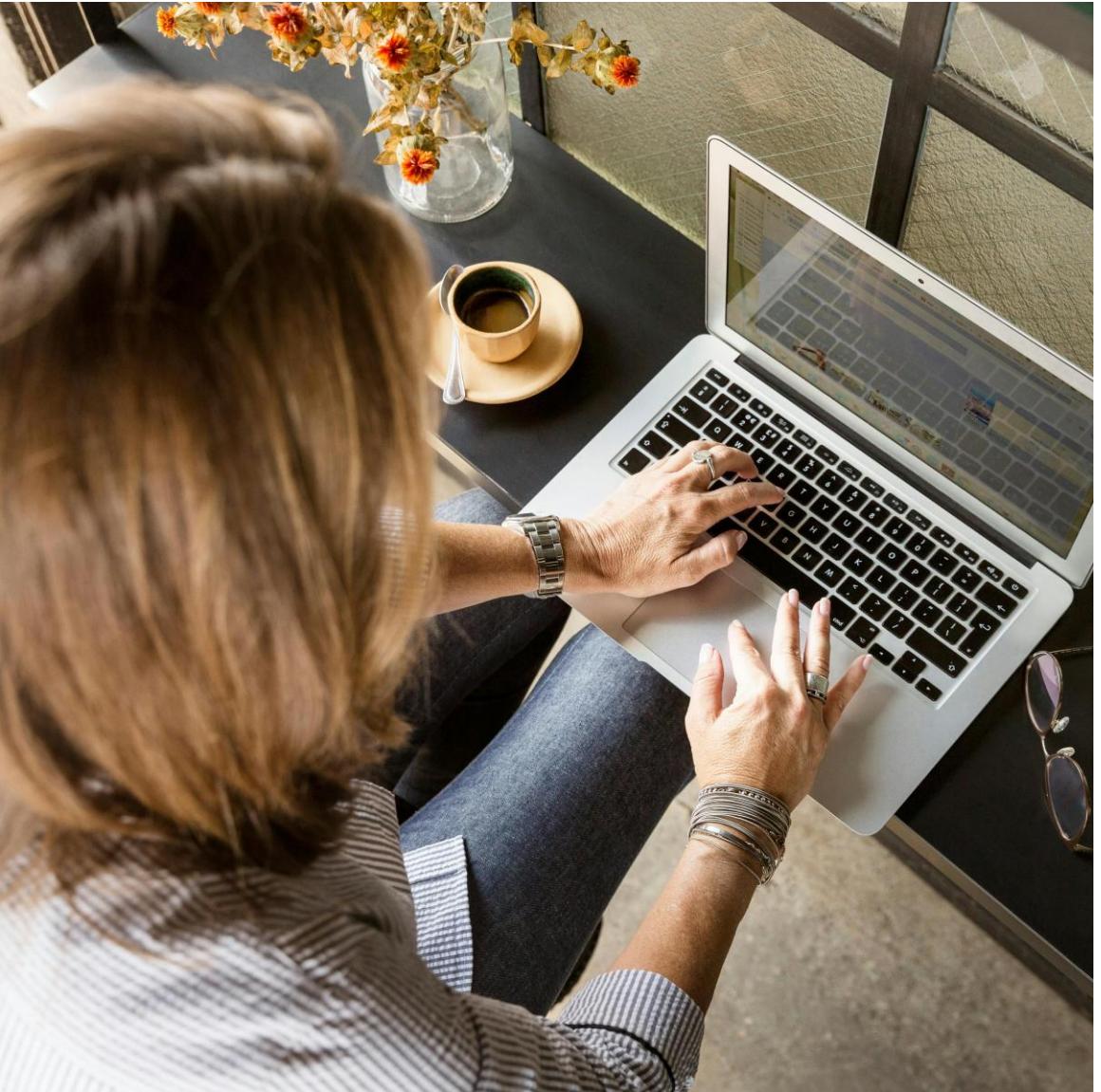
Doctor Services > Order Worksheet				
Category	QTY	Item#	Description	Retail Price
Dr. Service				
	1	20500002644454	OD Service Add On Only - REG	\$0.00
	1	20500002502983	No Show Fee	\$50.00
	1	20500000523652	ADD-ON ONLY PACKAGE ARTICLE	\$0.00
TOTAL: \$50.00				

PATIENT PORTAL

Set patients up prior to appointment:

- ✓ Allows them to self schedule
- ✓ View Rx & Exam records
- ✓ Link family members

<https://www.revolutionphr.com>



PATIENT PORTAL

Home Patients Test, B X

Test, Bre Two #119805085 (NEW) 04/04/2004 (20 Years) Female 1105 morning, PERRY, Georgia 31069 (456) 456-4561 Wright, Brittany Practice & Training PHR: No

Quick View Add Task Book Appointment Add to Wait List Notes Record Summary Patient Letters

Demographics

Personal Details Additional Information Employer / School Referral Information Login Information

Login Details

Allow Login

Username * Username is available.

Password *

Authorized Patients Test, Lisa*

Representatives

Menu

Patient Summary

Optical Summary

Demographics

Family/Contacts

Rx

Exam History

Account

Notes

Insurance

Diagnosis History

Recall

Orders - Medical

Orders - Optical

Tasks

CHECK IN

Our first moment to positively impact the patient experience and show our patients how much we care.

Set Patient Expectations:

- Provide a warm welcome
- Let them know you've got a new system and thank them for their patience
- Review insurance deductibles, copays with patient and inform of same day payment



INTAKE FORMS

At Check In, scan and acknowledge into RevolutionEHR Documents section:

- Financial Forms (ABN)
- PHI Forms
- HIPAA Acknowledgement
- Site Specific Forms
- FTC Rx Form

Outside Rx:

- HIPAA and scan to saved folder on Register 1 desktop





FRONT DESK | SKILLS CHECK

Utilize your **Integration Week Training Guide** to review everything you've learned in your RevolutionEHR Google Classroom!

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 (fee) 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

FRONT DESK | SKILL DRILL



TRUE OR FALSE....

You can wait until the patient is in the office to determine if they will be using insurance?

Using the Wait List is a great way to fill in slots when a patient cancels?

You can filter your view of the schedule to your preference?

You must have the appropriate insurance entered into the demographics section but the Fee Schedule does NOT need to be applied?

You can scan directly into RevolutionEHR?

The type of exam you select drives the tech/OD encounter template?

PATIENT ENCOUNTER

The Patient Encounter is the second moment to positively impact the patient experience. Here we show our patients that we hear their concerns and begin to address them (medical or visual).

Patients Trust the doctor to make recommendations and value their expertise.

How can you reinforce the patient experience while navigating a new E.H.R System?





TECHNICIAN & OD | SKILLS CHECK

Utilize your **Integration Week Training Guide** to review everything you've learned in your RevolutionEHR Google Classroom!

Technicians:

- 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.

Technicians: know how to complete the testing expected by your O.D. Varies by practice/OD preference.

Doctors:

- 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

Doctors, familiarize with Consultative Selling Tools in the Toolkit & iPad: Live Consult Form, Patient Questionnaire, Lens Simulator, Price Guide, Lens Assortment, etc.

TECHNICIAN & OD | SKILL DRILL



TRUE OR FALSE....

Either the Live Consult or the Patient Questionnaire should be used 100% of the time?

All OD equipment will integrate into RevolutionEHR?

All previous exam records will import into RevolutionEHR from your legacy system?

The RevolutionEHR templates are customizable?

We must have all patients sign for their Rx to be in compliance with the FTC Ruling?

You must code your encounter for the check out team to invoice all patients?

CHECK OUT

- How does your pre-appointment process work now?
- How do annual exams benefit both the patient and the practice?
- How will you manage your next eye exams going forward?



PATIENT PRESCRIPTIONS

WHAT: The new FTC rules require doctors to obtain confirmation from a patient that the prescription was provided to the patient.

- *The Eyeglass Rule of 2024 mirrors the requirements of the Contact Lens Rule of 2020.*
- *The FTC indicates that patients must be given their prescription prior to doctors promoting in-office eyeglass and contact lens product sales.*

WHEN: The rule goes into effect on September 24, 2024. Announced on 6/27.

WHY: This established, longstanding rule required providers to provide patients with prescriptions at the end of an exam and cannot charge a fee or require eyeglass purchase for prescription release. The motivation behind this ruling was fair market competition and consumer choice. Consumer surveys, public comments and issued warnings throughout the last few years have positioned the FTC to take another stance this year and address continued non-compliance.

PATIENT PRESCRIPTIONS

HOW: We are establishing a process to capture acknowledgement of the delivery of eyeglass and contact lens prescriptions.

- We will do this via a paper form
- All signatures (acceptance or refusal) must be maintained for 3 years.
- Forms are found in Toolkit > Documents Folder > Poly & Procedure > FTC Eyeglass Rule

Process to Implement:

1. Patient provided form at check out from PCC or Optical Staff if transitioned to dispensary.
2. Patient signs.
3. Staff scans into patient's record in E.H.R.



PATIENT SCENARIOS

Rx, Refraction Fees, or Both?

- Refraction same OD both years
- New OD no change in Rx
- Tech shouldn't extend other OD Rx.
- No change in refraction- okay fill old Rx??
 - Medical visit and did not pay for refraction

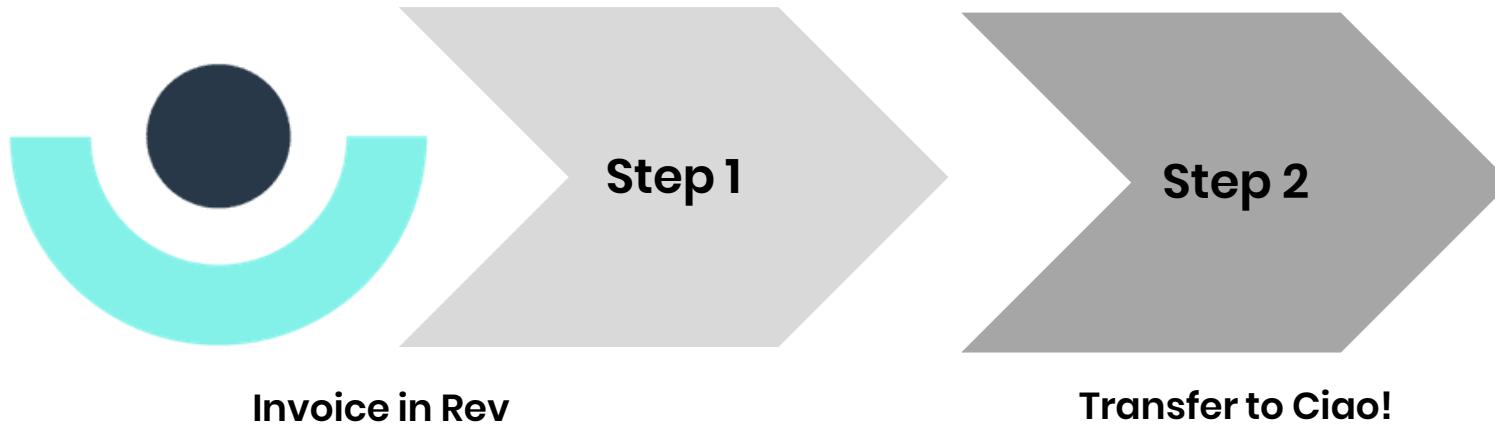
Key Takeaways:

- ✓ OD completes refraction= Patient pays & we provide Printed Rx
- ✓ Always enter new Rx. Even if no Rx change, update prescription dates
- ✓ Charge for services



CHECK OUT REMINDER

Check out is a two-part process for all patients (cash pay, medical, routine)



What will it look like in your office?



CHECK OUT | SKILLS CHECK

Utilize your **Integration Week Training Guide** to review everything you've learned in your RevolutionEHR Google Classroom!

- 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

Reminder: You must complete your "check out" process in RevolutionEHR AND transfer all services to Ciao! Optical.

CHECK OUT | SKILL DRILL



TRUE OR FALSE....

You must invoice the patient in RevolutionEHR the same day as services are rendered?

Services, copays, and out of pocket expenses are due at the time of service?

You must record accurate payment details in RevolutionEHR although payment is recorded in Ciao! Optical?

Medical Invoices are left in “pending” status vs Routine & Cash Pay are “authorized”?

There is a patient balance left in RevolutionEHR?

What do you do if the “apply fee” schedule button is not visible on your invoice?

MEDICAL INSURANCE

Question:

- What is your current process?
- How familiar are you with Trizetto?



PROCESS OVERVIEW

Basden Eye Care will be the legal entity (tax ID) listed on all insurance claims. While processes will be updated with TeamVision's systems and support teams, it's important to know who will be filling claims by each carrier.

MEDICAL INSURANCE		
Carrier	Future State	Cash Posting
Medical & Medicare	<ul style="list-style-type: none">• Collect all copays & deductibles at the time of service• Billed through RevolutionEHR & Trizetto• Medical biller to scrub claims and submit• Using E.H.R. Invoice, enter services into Ciao! Optical	Site/Medical Biller Posts in E.H.R.
Medicaid	<ul style="list-style-type: none">• Collect all copays & deductibles at the time of service• Billed through RevolutionEHR & Trizetto• Medical biller to scrub claims and submit• Materials filed through portal using frame kits (SEEN)• Using E.H.R. Invoice, enter services into Ciao! Optical	Site/Medical Biller Posts in E.H.R.

Medical Invoices left in **Pending Status**. There will be **Insurance Balances** left in the E.H.R. **Never** hold patient balances.

PROCESS OVERVIEW

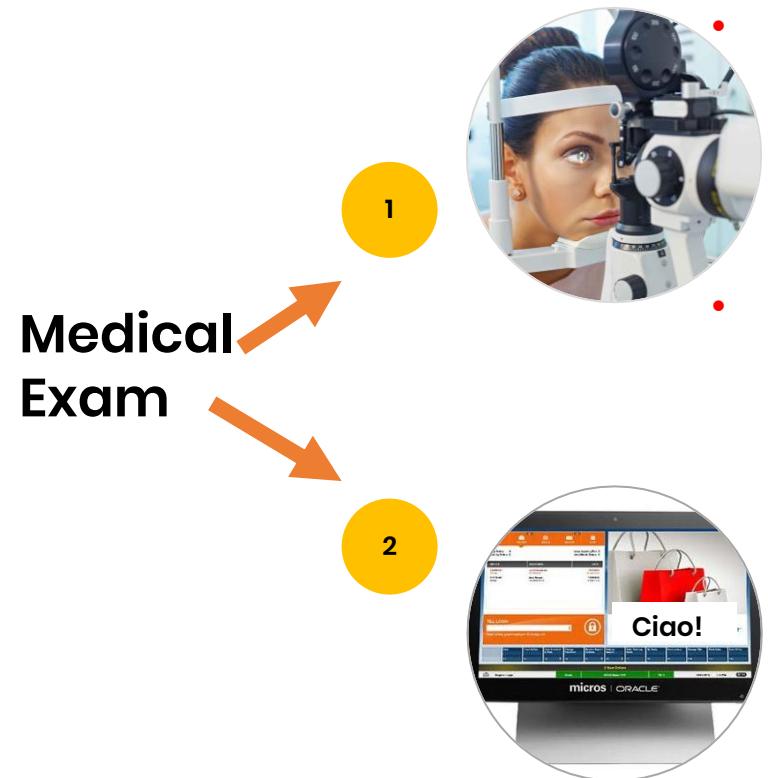
MEDICAL POST SERVICE PAYMENTS (Patient Insurance Balances)

Payment Type	Future State	Cash Posting
Card Do not use in office card processor (Finix)	<ul style="list-style-type: none">Patient pays in office- use Transaction Express in Toolkit to collect paymentPatient statement will direct patients to pay via practice website	Site/Medical Biller Posts in E.H.R.
Check	<ul style="list-style-type: none">Patient pays in office- weekly Mail Checks To T167 with patient statementPatient statement will direct patients to mail directly to T167	Site/Medical Biller Posts in E.H.R.
Cash Do not accept cash	<ul style="list-style-type: none">Reach out to your biller if this is the only form of payment a patient can make.	
<ul style="list-style-type: none">Medical billing will be held post integration until accounts & systems set up (30-60 days).Reach out to your biller with questions.		

PROCESS OVERVIEW

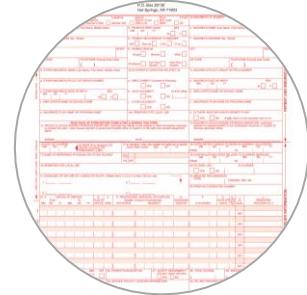
PLAN NAME	PLAN ID	BILLING
MEDICAL AETNA-DAL	1834268	Corporate
MEDICAL ALLIANT HEALTH PLANS-DAL	1834270	Corporate
MEDICAL ANTHEM BCBS-DAL	1835957	Corporate
MEDICAL BCBS-DAL	1834265	Corporate
MEDICAL BENEFIT SUPPORT-DAL	1841291	SITE
MEDICAL CIGNA HEALTHSPRING-DAL	1834269	Corporate
MEDICAL CIGNA-DAL	1834267	Corporate
MEDICAL HEALTH PARTNER-DAL	1834273	Corporate
MEDICAL HUMANA-DAL	1835163	Corporate
MEDICAL LIONS CLUB-DAL	1841292	SITE
MEDICAL MEDICARE-DAL	1834262	Corporate
MEDICAL MERITAIN-DAL	1834274	Corporate
MEDICAL TRICARE-DAL	1834264	Corporate
MEDICAL UHC-DAL	1834266	Corporate
MEDICAL ALLIANT HEALTH PLANS-DAL	COMING SOON	Corporate
MEDICAL CIGNA HEALTHSPRING-DAL	COMING SOON	Corporate
MEDICAL MERITAIN-DAL	COMING SOON	Corporate
MEDICAL VA OPTUM-DAL	COMING SOON	Corporate

PROCESS OVERVIEW



Insurance details entered into REV & Invoice completed

- Enter all insurance carriers
 - Do not enter a fee schedule for secondary insurances
 - We do not create secondary insurance invoices at the site level
- There is never a patient balance
 - We collect all copays and record that the patient has paid on the invoice



Claim sent to Insurance carrier via Trizetto for billing

- Will automatically bill secondary insurance after primary claim paid

Patient sent invoice if we under charged

- Link on Bill or Transaction Express
- Patient to pay via check
 - TB with your medical biller

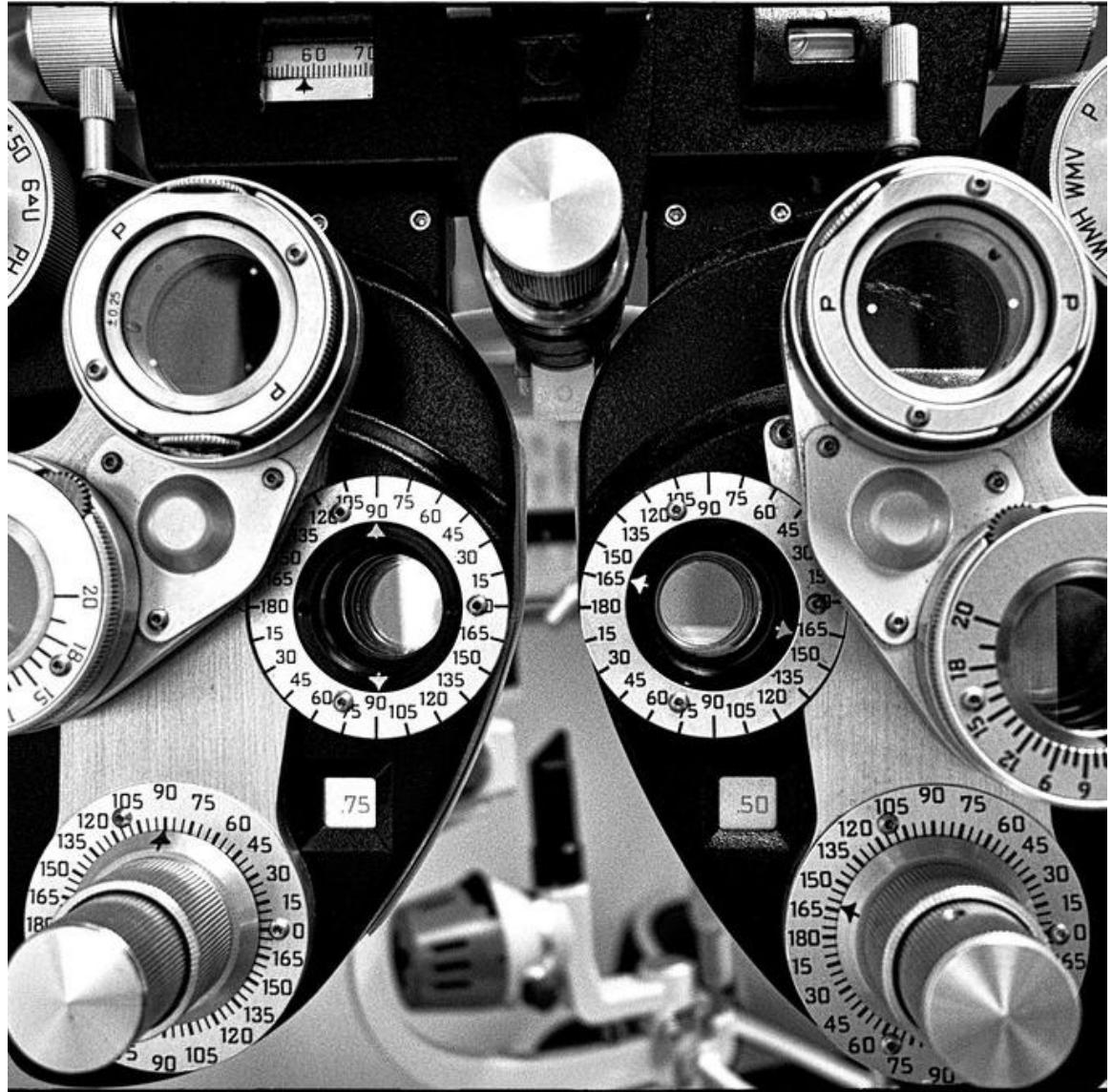


- 1. Bulk assign services to either insurance carrier and/or patient (two invoices created).**
 - For the medical invoice, Apply Fee Schedule
 - Click Transfer Item for any copays and enter copay details if applicable
 - Leave Medical Invoice in Pending status
 - If insurance carrier will not cover services, the patient will be Bulk Assigned those fees (or the patient has a copay) a second invoice will be created.
- 2. On the Patient Invoice (second invoice).**
 - Authorize and record as Paid
- 3. Enter all services, copays in Ciao! Optical.**



Important Notes:

- Medical: Do Not Authorize Invoice.
- Patient Invoice: Authorize & Mark As Paid.
- Insurance balance left in the E.H.R.
- Zero patient balances left.



TASKS | RevolutionEHR

- Primary way for your billers to communicate with you
- You can assign it to another individual
- Assign it back to biller for update
- Mark as completed

Tasks Search Task #34364734

Assigned To: Martinez, Tracy

Created By: shannon_butler

Created On: 05/22/2024

Completed On: N/A

Notify on Completion:

Notify on Update:

Due Date: mm/dd/yyyy

Priority: Normal

Category: Accounting

Patient: Ogletree, Gianna

Description: * pt mom has questions about Bill

Save Save and Close Cancel Complete Reassign Cancel Task

Notes

LIVE DEMO

Let's review together:

- Operational guide
- Your insurance guide
- Practice invoices
- Your invoice



MEDICAL INSURANCE | SKILLS CHECK



RevolutionEHR

- Code services if needed
- Complete a medical insurance invoice –zero copay from patient
- Complete a medical insurance invoice – \$25 copay from patient
- Doctor forgot to add a service, add in the invoice

Ciao! Optical

- Search and select insurance plan
- Use Rev Invoice (s) to enter services
 - Insurance & patient invoices
- Ensure the order is at ready status (ready for tender)

MEDICAL INSURANCE | SKILL DRILL



Let's review...

Show us how to complete a medical invoice without a copay.

Show us how to complete a medical invoice with a copay.

True or false, we authorize the invoice?

True or false, I can bill the insurance carrier to see what's covered?

True or false, we bill the secondary insurance carrier at the site?

ROUTINE INSURANCE

Question:

What is your current process?



INSURANCE OVERVIEW

After Appointment

- For VSP, if Exam Auto-Calculation plan selected in Ciao! Optical, the claim will be filed with VSP automatically
 - If incorrect plan was selected, member details, authorization, or diagnosis missing the claim will be sent back to the practice to re-key
- All Carriers-Bill Actual plans: your billing team will file the claim
 - For insurance required labs-packing slip will be sent as needed

INSURANCE OVERVIEW

PLAN NAME	PLAN ID	BILLING
EyeMed	Search Member	Auto-File
VSP-DAL	1834259	Corporate
SUPERIOR-DAL	COMING SOON	Corporate
COMMUNITY EYECARE-DAL	COMING SOON	Corporate
DAVIS VISION-DAL	COMING SOON	Corporate
SPECTERA-DAL	COMING SOON	Corporate

INSURANCE OVERVIEW

INSURANCE	LAB
EyeMed, Superior, All others	RxO
VSP Only	<p>New Southern Lab Accounts: <i>*add to Eyefinity dropdown</i></p> <p>T176 Southeast Eye Group Hiawassee – 40215058991 T177 Southeast Eye Group Blairsville – 40215058993 T178 Southeast Eye Group Clayton – 40215058994</p>

Lab Notes:

- Only insured/claimed eyewear orders may go to Insurance Required labs.
 - In LPA, mark as RxSun Authentic
- 2nd Pair or private pay orders will always go to RxO.

Southern Lab Address:

1856 Corporate Dr # 150, Norcross, GA 30093

PH: 800-765-7343

PROCESS OVERVIEW

1



Insurance details entered into REV & Invoice discounted

- Apply Insurance Fee schedule
 - if button not present, fee schedule was not entered
- Record Optomap fees and record that the patient has paid on the invoice
- **There is never a patient balance**

2



Services entered into Ciao!

- Auto-Calc plans are priority
- Bill Actual plans if needed
- Patient payment collected

PROCESS OVERVIEW

3



Claim filed

- 837 from Ciao!
- Mason Billing/site
- Insurance required
labs, send frame

Auto-Calc plans

837 File

- Select correct plan
- Enter correct auth & member details
- File sends once per week

Bill Actual

Mason:

- Log order on additional info sheet
- Biller will return packing slip within 48 hours
- Once received, site sends frame to lab

site (only when directed)

- File claims (exam & materials)
- Order eyewear and print packing slip
- Ship frame to lab



Denied claims

- Will be sent back to the site for correction

Over payments

- If correct plan selected, back-office process will refund patient

Denied claims

- Will be sent back to the site for correction

Over payments

- Site may have to rekey to generate refund to patient

Routine Vision Insurance

Bulk assign services to either insurance carrier or patient (two invoices created)

1. Insurance Invoice:
 - For the routine invoice, **Apply Fee Schedule** to zero out claim
 - **Authorize** the claim and record as **Paid**
2. Patient invoice:
 - **Authorize and record as paid**
3. Enter all fees to **Ciao! Optical**



Reminders:

- Authorize invoice & mark as paid
- Zero balance in the E.H.R.



ROUTINE VISION INSURANCE

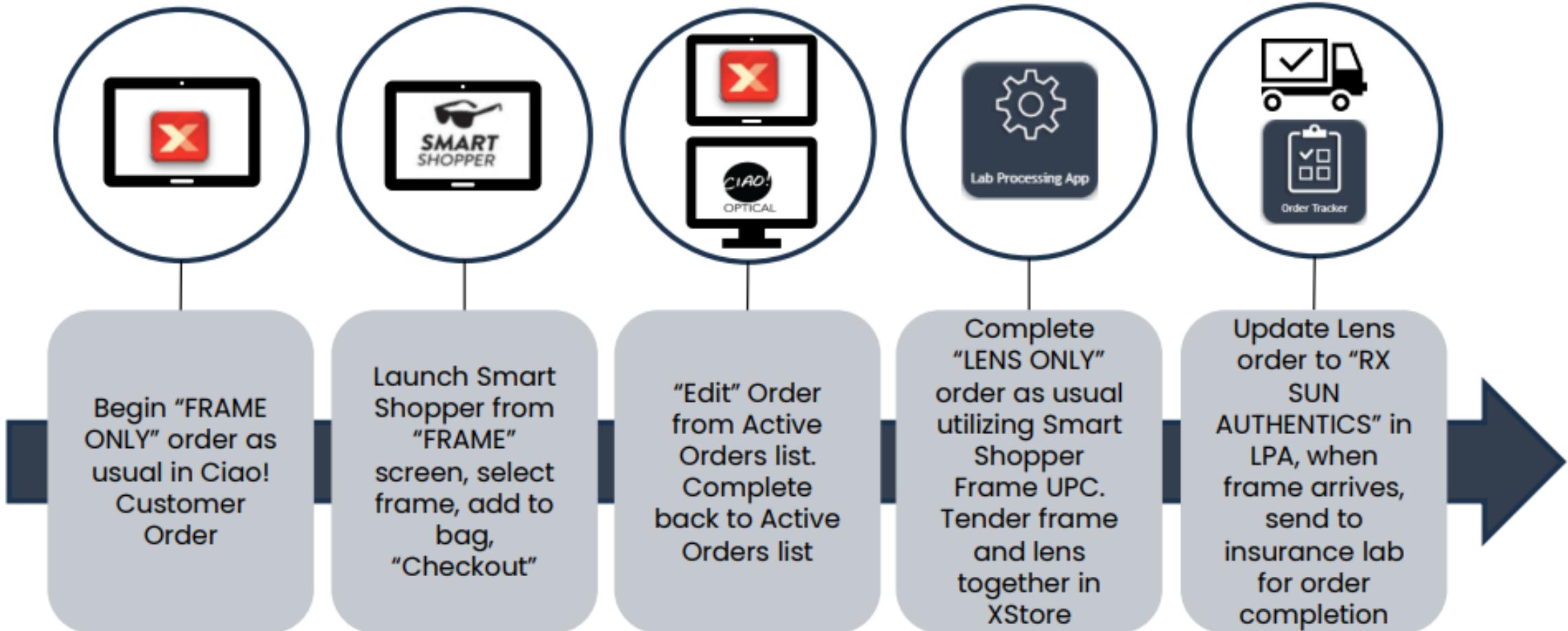
Let's review together:

- Operational guide
- Your insurance guide
- Practice worksheets
- Practice in Ciao!



INSURANCE | SMART SHOPPER

With insurance required labs, smart shopper will supply the frame, and the insurance lab will provide the lenses. Due to this, the order must be separated in ciao!



ORDER MANAGEMENT

Insurance Required Labs:

- Separate out RxO vs. Insurance labs (classic & southern)
- Clear indicator for orders you're waiting on packing slips vs. in production



ROUTINE INSURANCE | SKILLS CHECK



Auto Calculation

- Search and select insurance plan
- Complete insurance demographic information
- Exams
- CL fitting only
- Contact lenses under \$1000
- Specialty contact lenses

Bill Actual

- Search and select insurance plan
- Complete insurance demographic information
- Lenses only
- Contact lenses over \$1000
- Eyeglasses
- LPA: change lab

ROUTINE INSURANCE | SKILL DRILL



Let's review...

Show us how to process a choice exam \$10 copay.

Show us how to process a signature exam with a toric fit \$20 copay/ \$60 fitting?

True or false, if I use an auto-calculation plan, I will have to file the claim?

True or false, I can use my existing logins to file the claims?

True or false, I do not need to file an eyeglass claim for VSP because it will auto file?

POST INTEGRATION

What's to come:

- Post support for 2 weeks
- Continue your learning journey
 - In person
 - Patient Journey & guides
 - Leonardo



ADJUST PROCESSES

Tips:

- Adjust processes to fit new systems
- Embrace new company tools
- Work as a team
- Have a plan- What's the 1 or 2 things I'm going to work on today???



POST INTEGRATION REMOTE TRAINING

Consultative Selling Patient Journey (6W)

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 our products as the solution that best meets those needs.

LEARN about the patient by reviewing history and insurance, even before they arrive. When in clinic, facilitate a conversion around lifestyle, pain points, and needs. Ensure this information is travels with the patient.

LISTEN actively during patient hand-off and ensure to ask additional questions to understand the patients needs. This will guide your sales approach and what products and services to recommend today.

LEAD with a single recommendation for each product to meet lifestyle or prescription needs. Assume the sale and create value. Showcase our preferred products and share the benefits with the patient.

Patient Journey 6W						
STANDARDS		Prepare	Learn	Listen	Lead	Review
TOOLS + RESOURCES						
STANDARDS	Fill the Books Insurance Welcome	Get To Know Your Patient Consultation	Hand Off Consider Solutions (Product + Service + Referrals)	Assume The Sales Recommend Products	Accurate Entry OneSight Thank You	Order Management Pick Up Optical Expert
TOOLS + RESOURCES	Data Capture Pre-Appointment	Patient Questionnaire Intake Form	OD Hand Off Observation	LensSimulator SmartShopper Lens Portfolio Guide Contact Price Card Promotions	EyeRuler2 Patient Referral	Take Action Tab Eyewear Analysis
KPI IMPACT	Exam Growth Fill Rate No Show Rate	Sales Comp Sales	Retail Capture OD Productivity Average \$ Patient	Multiples Sun Avg \$ Spec Unit/Lens Avg \$ CL, Annual Supply	EPP EyeRuler Grateful Patient Google Review	Google Review RTFT Reject Dwell

POST INTEGRATION REMOTE TRAINING

Insurance (4W)



PREP FOR SERVICES

PCC's, PM

DAY OF SERVICES

Check Out, Optical, PM

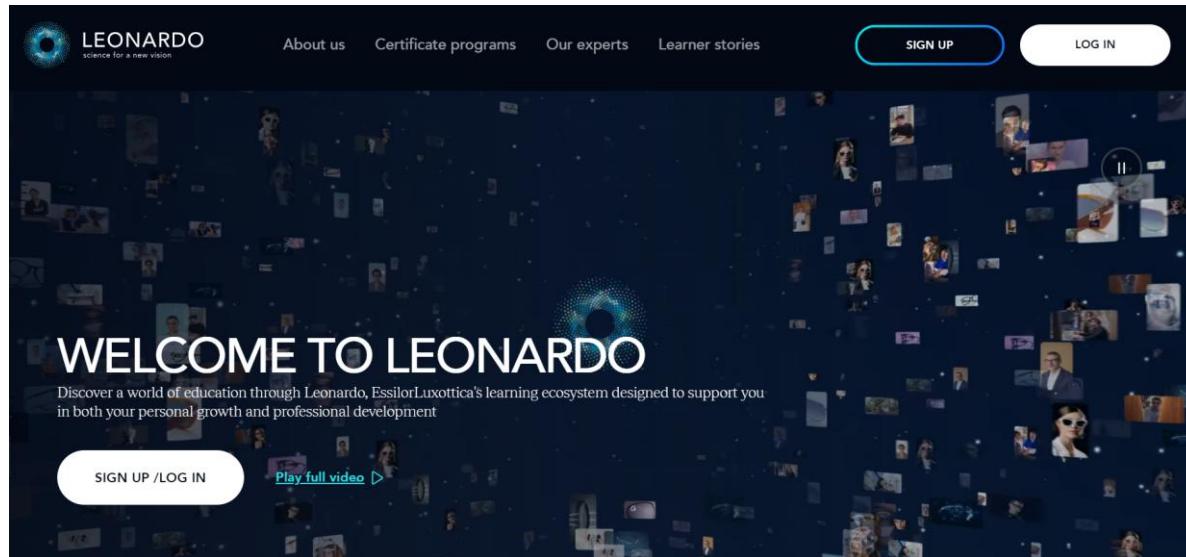
POST SERVICES

Ins. Leads, PM

LEONARDO ONBOARDING

Begin after integration week:

- PM, PCC, & Optical Team members may have assigned Onboarding Lessons



Essential Path

3.5 weeks to complete

Enrichment Path

3.5 weeks to complete

Compliance Modules

Next 30 days

COMPLIANCE TRAINING

LEONARDO LESSONS

All Employees to complete:

- Lessons can also be accessed by clicking the links on attached checklist
- New hires need to complete within 30 days of hire

Reporting & Results

- **Goal is 95% or above** in Training Saturation Results
- Reporting cadence Monthly

LEONARDO COMPLIANCE

Conversion & New Hire

Access Leonardo directly from the Ciao! Optical Toolkit or [Leonardo Learning platform | EssilorLuxottica](#). Login with **EssilorLuxottica ID** and **Network Password**. Use this checklist to complete the mandatory compliance lessons within 30 days of conversion or hire date. Many of the lessons will be accessible from your To-Do List in Leonardo or click on the hyperlink below to be directed to the lesson.

Category	Duration	Lesson with Link	Team Member	Doctor	Field & Corporate
Healthcare Compliance	30 min	ADA Training – North America	Yes	Yes	Yes
	Coming Soon	New Medicare-Medicaid FWA	Yes, when available	Yes, when available	Yes, when available
Data Privacy	30 min	2024 Patient Rights and Privacy Under HIPAA	Yes	Yes	Yes
Ethics Compliance	Coming Soon	New Code of Ethics	Yes, when available	Yes, when available	Yes, when available
Store Operations	15 min	Introduction To Asset Protection	Yes	Yes	Yes
	10 min	Recognizing and Avoiding Phone Scams	Yes	No	Yes
	15 min	The 3 Rs Of Shoplifting Prevention	Yes	Yes	Yes
	15 min	2024 Accident Prevention	Yes	Yes	Yes
	40 min	2024 Workplace Emergency 1. 2024 Emergency Response 2. 2024 De-Escalating Conflict 3. Active Shooter: Response and Procedures	Yes	Yes	Yes
	20 min	2024 Environmental, Health, and Safety Acknowledgement	Yes	Yes	Yes
	45 min	2024 Hazardous Materials Handling 1. 2024 Hazardous Communication in Stores 2. 2024 Dangerous Goods Shipping Awareness 3. 2024 Waste Management in Stores	Yes	No	Yes
	15 min	Incident, Injury and Illness Reporting – NA Region	Yes	Yes	Yes
	5 min	2024 Electrical Safety	Yes	No	Yes
	10 min	2024 Waste Management: Lab Operations	Yes, Sites with IOF Lab	No	Yes
Health & Safety	Coming Soon	New Hazard Communication Lab	Yes, Sites with IOF Lab when available	No	Yes
	Coming Soon	New Workplace Violence & Harassment Prevention	Yes, when available	Yes, when available	Yes, when available

Additional Lessons by State:

Category	Duration	Lesson with Link	Team Member	Doctor	Field & Corporate
California Additional	10 min	2023-24 CCPA and Amended CPRA	Yes, California	Yes, California	Yes, California
Chicago Additional	60 min	2023-24 Bystander Intervention Chicago	Yes, Chicago	Yes, Chicago	Yes, Chicago

FRAME ASSORTMENT

Leonardo Lessons:

- Learn about our heritage brands such as Burberry, Dolce & Gabbana, Polo & more!
- House brands such as Ray-Ban, Oakley, Costa & more!

Virtual Classrooms, Runways, and general product knowledge is available!



LENS ASSORTMENT RESOURCES

Varilux.

Eyezen.

Crizal.



Transitions
light intelligent lenses



- Lens Assortment Pricing & Ranges Resource
- Leonardo Lessons
- Essilor Expert training video

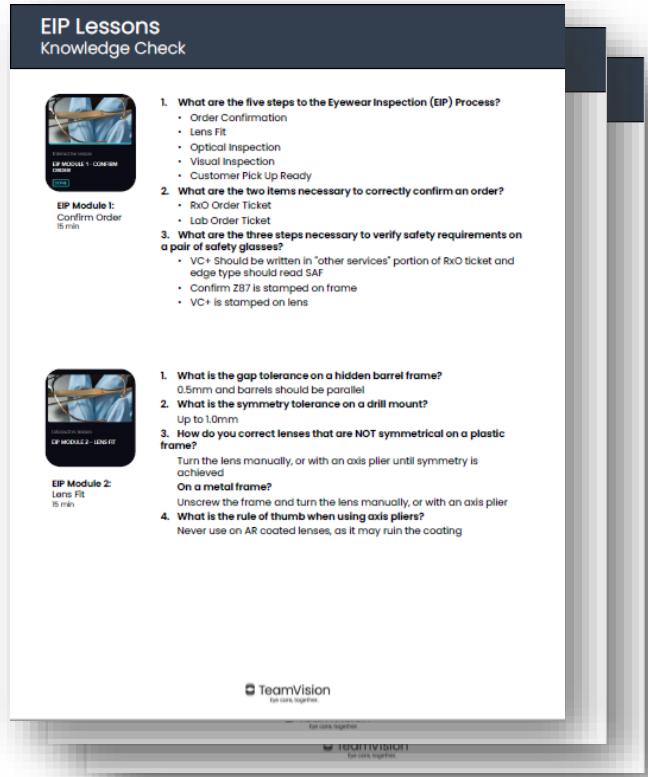


EYEWEAR INSPECTION PROCESS (EIP)

LEONARDO LESSONS

30- 45 Days Post Conversion

Completed on Leonardo using Luxottica Network Credentials



EIP Module 1: Confirm Order

15 min

EIP Module 2: Lens Fit

15 min

EIP Module 3: Digital or Manual Optical Inspection

1 hr 10 min

EIP Module 4: Visual Lens Inspection

15 min

EIP Module 5: Customer Pick up Ready

15 min

EIP Module 6: First Inspection Full- Service Labs

1 hr 20 min

INSTAKEY & KEY CONTROL

Maintenance Portal

To streamline the store re-keying process and improve the safety of our sites, all locations will install InstaKey for exterior/interior door locks.

InstaKey is a comprehensive key control management tool for sites that will improve the physical security of our team members, lessen the time spent in managing locks and keys, and mitigate key control costs.

As part of this initiative, sites will request this service in Maintenance Portal.

KEY CONTROL

InstaKey Request

To streamline the store re-keying process and improve the safety of our sites, all locations will install InstaKey for exterior/interior door locks.

InstaKey is a comprehensive key control management tool for sites that will improve the physical security of our team members, lessen the time spent in managing locks and keys, and mitigate key control costs.

As part of this initiative, sites will request this service in Maintenance Portal.

Create a New Workorder following the below path:

Keyword Search			
Area	Problem Type	Equipment	Problem Code
ENTRY / Locks and Keys / Exterior Door / Require new core			
Store Number			
T038			
Full Name / Title			
Baumeister, Karen			
Area			
ENTRY			
Problem Type			
Locks and Keys			
Equipment			
Exterior Door			
Problem Code			
Require new core			

Provide the below details to complete the request:

Please include all necessary details below of the issue then proceed with this service request. Thank you.

Enter Complete Problem Description, Referencing Troubleshooting Scripts Above:

New site for TeamVision. Need InstaKey installed.

Previous

Cancel

Next

INTEGRATION AUDIT

CAMS (AP PORTAL)

TEAMVISION CONVERSION AUDIT			
Environmental, Health & Safety			
Audit Question	Risk	Points	French Translation
Are electrical power cords on all equipment and appliances in good condition, with no exposed wires or damaged and/or missing prongs?	Low	1	Les cordons d'alimentation électrique de tous les équipements et appareils sont-ils en bon état, sans fils dénudés ni broches endommagées et/ou manquantes ?
Is there a 3-foot (36 inch) clearance in front of breaker panels? (Clearance area marked off on the floor and/or a warning label posted on the panel door)	Medium	2	Y a-t-il un espace libre de 3 pieds (36 pouces) devant les panneaux de disjoncteurs ? (Zone de dégagement délimitée au sol et/ou étiquette d'avertissement apposée sur la porte du panneau)
Are electrical cords secured and not located in walkways, or posing trip or entanglement hazards to associates or patients? (Electrical cords and cables at dispensing tables must also be secured)	High	2	Les cordons électriques sont-ils fixés et ne se trouvent-ils pas dans les allées, ou ne présentent-ils pas un risque de trébuchement ou d'enchevêtrement pour les associés ou les patients ? (Les cordons et câbles électriques des tables de distribution doivent également être fixés).
Are child safety caps in place in all patient facing areas including optical, waiting room, and/or OD offices?	Low	1	Des bouchons de sécurité pour enfants sont-ils en place dans toutes les zones en contact avec les patients, y compris les salles d'optique, les salles d'attente et/ou les bureaux des médecins généralistes ?
Are all powered items (lab equipment, microwaves, mini-refrigerators, etc.) plugged directly into an electrical socket or a surge protector? (extension cords may not be used as a permanent power source)	Low	1	Tous les appareils alimentés (matériel de laboratoire, micro-ondes, mini-réfrigérateurs, etc.) sont-ils branchés directement sur une prise électrique ou sur un parasurtenseur ? (Les rallonges ne doivent pas être utilisées comme source d'alimentation permanente).
Are all exit doors clearly marked and not blocked? (Both the exit signs and emergency lighting must be cleared of obstructions)	High	2	Toutes les portes de sortie sont-elles clairement indiquées et ne sont-elles pas bloquées ? (Les panneaux de sortie et l'éclairage d'urgence doivent être dégagés de tout obstacle)
Do all exit signs work?	Low	1	Tous les panneaux de sortie fonctionnent-ils ?
Are sprinklers unobstructed with a minimum of 24" clearance from the ceiling?	High	2	Les sprinklers sont-ils dégagés, avec une distance minimale de 24 pouces par rapport au plafond ?
Are fire extinguishers present in marked location and not obstructed?	Medium	2	Les extincteurs sont-ils présents à un endroit indiqué et ne sont-ils pas obstrués ?
Are the fire extinguishers in good condition and inspected monthly? (Gauge is in the green, hose in good shape, nozzle appears clean, and monthly tag both on the extinguisher and filled out each month)	Medium	2	Les extincteurs sont-ils en bon état et inspectés tous les mois ? (La jauge est dans le vert, le tuyau est en bon état, la buse semble propre et l'étiquette mensuelle est apposée sur l'extincteur et remplie chaque mois).

TeamVision

Site Leader to complete Conversion EHS Audit Due within 30 days.

Site leaders will install new EHS supplies (order additional as needed), address any safety concerns immediately, and provide insights and recommendations to TeamVision.

IT & SYSTEMS SUPPORT

From the Toolkit:

- Use OneLink to communicate with SSS
- Who To Call & Who To Email
- OD Equipment

Call Store Systems Support:

- 1833 467 4243



QUESTIONS



CIAO! OPTICAL

Ciao! can be found on the iPad and on Desktop. Xstore is the cash register function of Ciao! Optical POS.

Ciao on the iPad is encouraged:

- Patient friendly
- Lens Simulator
- EyeRuler integrated into Ciao!
- Can not tender zero dollar sales or Cash

Desktop version of Ciao! makes it easier to toggle back and forth to RevolutionEHR.



LIVE DEMO

Let's review together:

- Ciao! Log in (iPad, Desktop, Training computers)
- Ciao! Demographics
- Ciao! Rx Entry (GL Only)
- Exam Entry





CIAO! DEMOGRAPHICS, RX, EXAM | SKILLS CHECK

Utilize your **Integration Week Training Guide** to review everything you've learned in your RevolutionEHR Google Classroom!

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
- Deactivate an RX, then reactivate
- Add new optometrist (don't save, just walk through the steps)

Enter Exams:

Cash Pay Only:

- 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 in Insurance: (Routine & Medical)

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

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

CIAO! DEMOGRAPHICS, RX, EXAM | SKILL DRILL



TRUE OR FALSE....

The Rx will automatically show up in Ciao Optical?

All of my current patients should have a Ciao! Profile already?

Will all previous data (demographics, purchase history, etc.) transfer over to Ciao! Optical?

Each time I'm assisting an outside Rx, I must upload/input the OD into Ciao! Optical?

I can use the RevolutionEHR invoice to identify what services were completed?

If the patient does not pay out of pocket (Zero Copay) I do not need to enter it into Ciao?

LIVE DEMO

Let's review together:

- Rx Entry
- Soft Contact Lenses Ordering
 - Ordering one eye only
- Specialty Contact Lenses Ordering
- Instant Savings
- NOVG Portal
- Toolkit Guides





CONTACT LENSES | SKILLS CHECK

Utilize your **Integration Week Training Guide** to review everything you've learned in your RevolutionEHR Google Classroom!

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

Dailies Total One -1.00 OU, 8.5/14.1
Acuvue Oasys (R)+2.00, (L) +1.50, 8.4/14.0
Biofinify Toric XR -1.00 -4.00 x 160 OU, 8.7/14.6
Biofinity Multifocal Toric -2.00 -2.00x090 (+2.00 add) OU, 8.7/14.5
RGP (R)+2.00, (L) +1.50, 8.4/14.0

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?

CONTACT LENS | SKILL DRILL



TRUE OR FALSE....

Will Biofinity Toric XR lenses be ordered through Ciao! Optical?

PM: Do you have access to set up new hires/existing employees?

Ciao! will automatically add the Express Shipping fee in XStore?

You can see order details in NOVG?

My contact lens vendor account numbers will be in the Toolkit?

I will not have access to my previous CL Reps?

LIVE DEMO

Let's review together:

- Complete pair ordering
- Lens only transactions





EYEGLASSES | SKILLS CHECK

Utilize your **Integration Week Training Guide** to review everything you've learned in your RevolutionEHR Google Classroom!

Complete Pairs and Lens Only Transactions: Cash Pay

- 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 on the left and incorporate:

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

EYEGLASSES | SKILL DRILL



Show us your skills....

Who can demonstrate how to sell a pair of eyeglasses?

Who can demonstrate how to complete a lens only order?

What information is on the Order Completion screen?

Will the multiple pair discount automatically apply?

If I'm a pilot, what non polarized lenses are available?

How do you order prism/Slab off?

LENS SIMULATOR

Lens Design



Varilux, Eyezen, DST, Sun, and More!

Lens Features



Crizal, Transitions, Polarization, Blue Filter

Lens Materials



Polycarbonate, High-Index, Plastic

HOW DO YOU USE IT?

Interactive lens tool designed to elevate the patient experience and support your tailored recommendations:

- Visually celebrate and showcase lens selections
- Educate by sharing lens details
- To bring your recommendations to life
- Compare, reinforce our Preferred Lenses!

Leverage with EVERY patient as part of Consultative Selling!



WHEN DO YOU NOT USE IT?

- Time constraint
- Repeat/duplicate orders
- More than two options are in consideration
- Patient is familiar with product features



LIVE DEMO

Let's review together:
• Lens Simulator



LENS SIMULATOR | PRACTICE

In groups, take turns being the patient, doctor, and observer. Practice the following scenarios:

- Budget friendly patient, but would benefit from high index
- First time progressive wearer
- Patient is wearing Rx sunglasses & clear, but you think they would also benefit from Transitions (in addition to Rx Sun)
- How could you educate on the benefits of Eyezen or Crizal Anti Reflective lenses



SCENARIO | LENS SIMULATOR

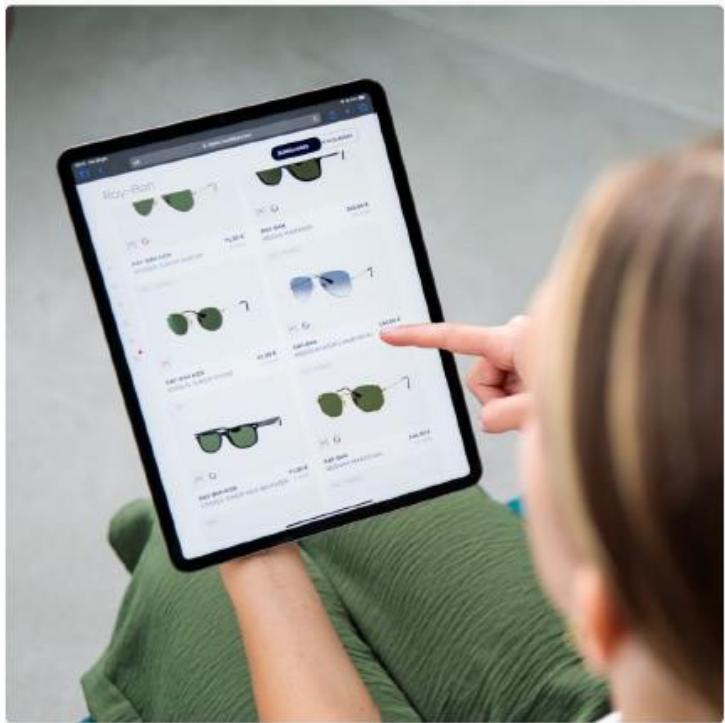
How would you introduce sun to a patient who has only worn OTC sun prior?

How would you introduce sun to a patient who only wears transitions?

What about the following professions?



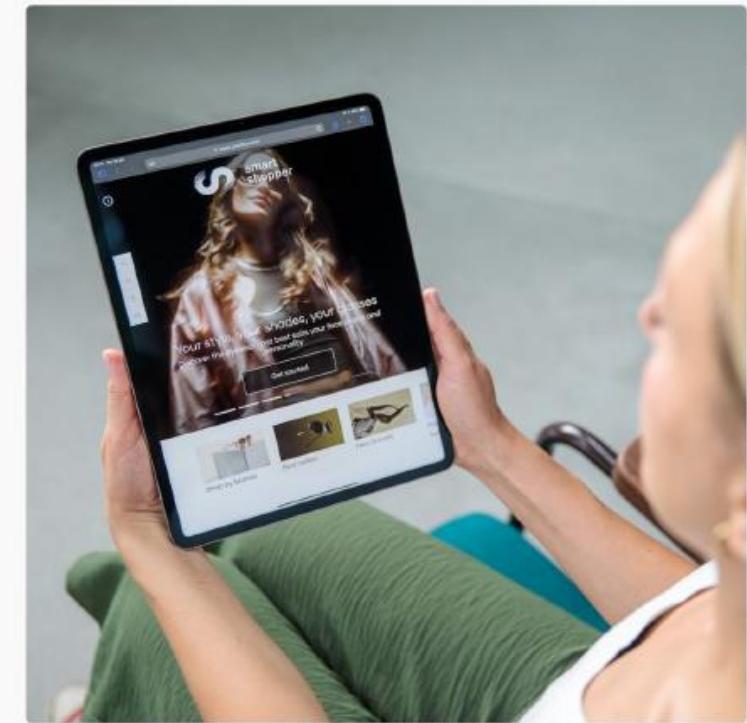
SMART SHOPPER



INFINITE CATALOG



CUSTOMIZATION

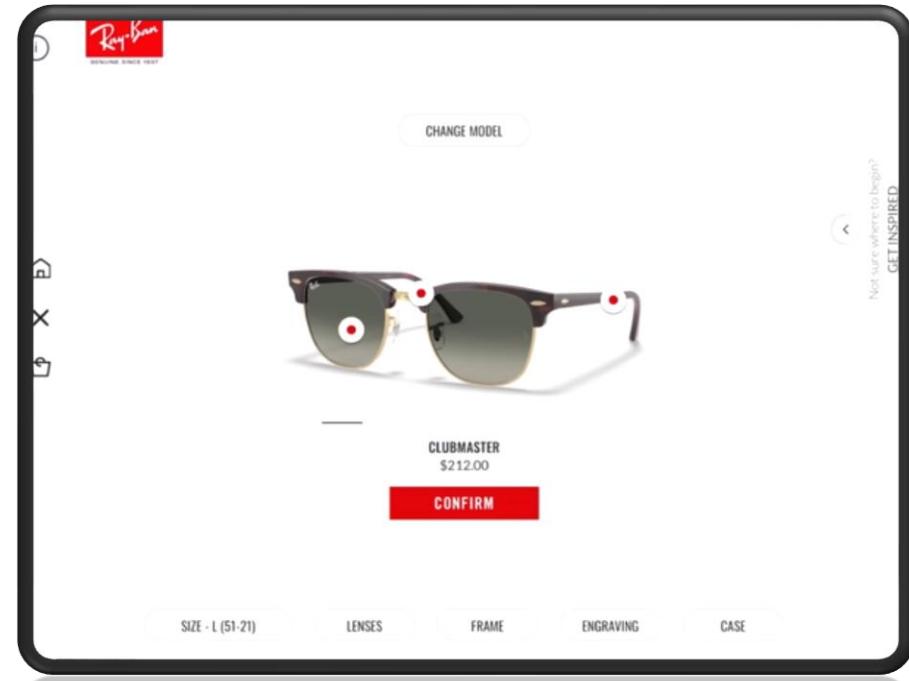
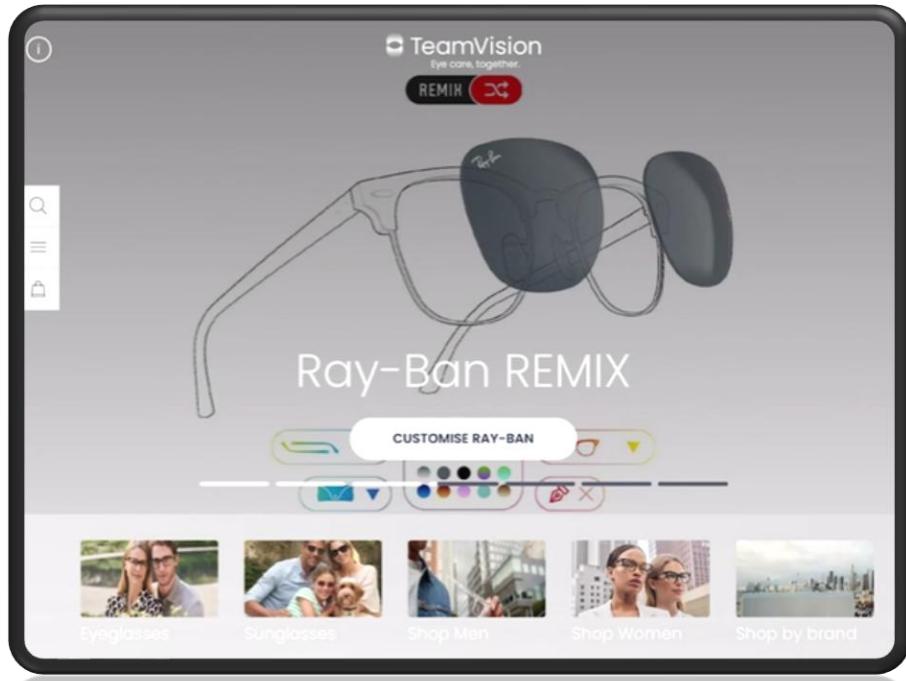


VIRTUAL TRY-ON

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!

SMART SHOPPER

Plano Customization of Ray-Ban and Oakley



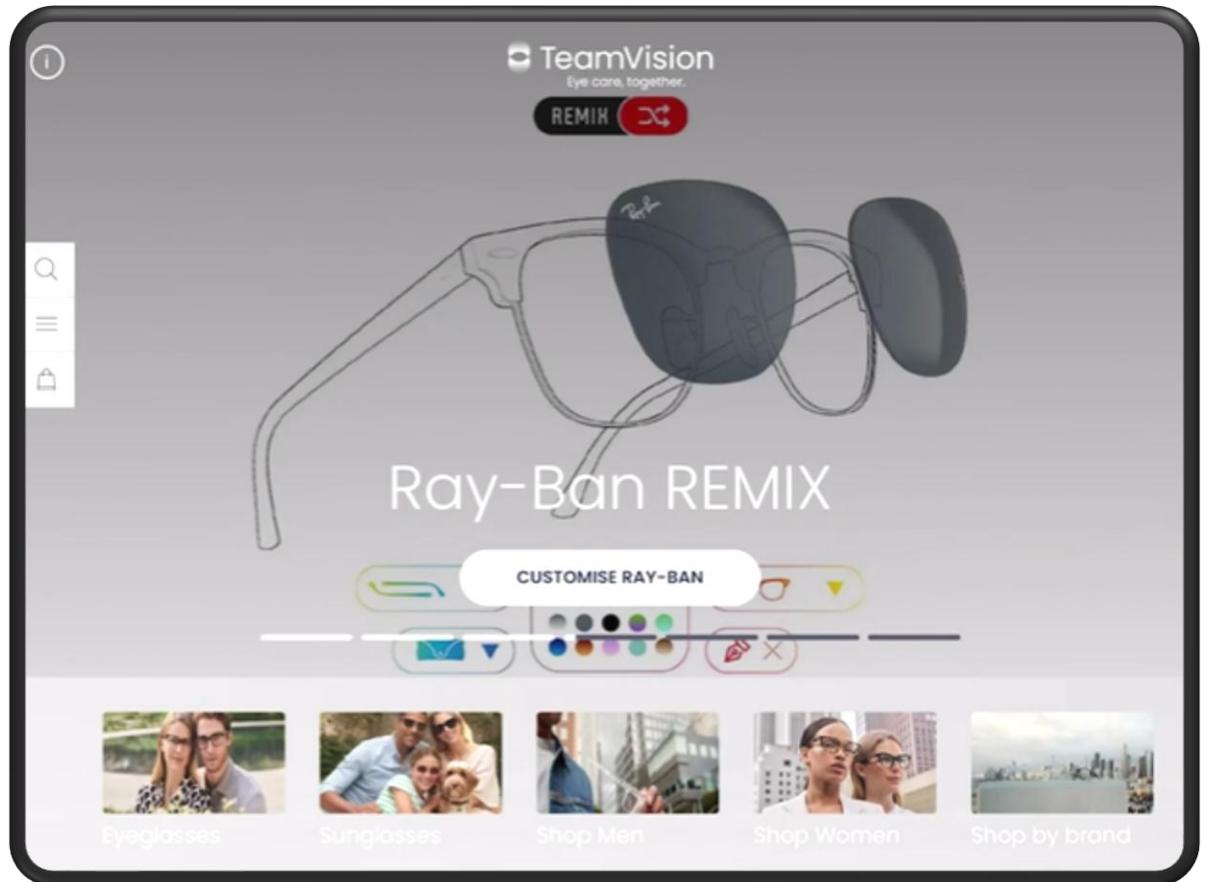
LIVE DEMO

Let's review together:
• Smart Shopper



SCENARIO | SMART SHOPPER

How would you introduce sun to a patient who wears contact lenses full time?



SMART SHOPPER | PRACTICE

- Presenting smart shopper to the patient
- Navigate with filters
- Find the following styles:
 - Narrow frames (46-48)
 - Wide frames (54-58)
 - Plastic frames with thin sides
 - Semi rimless frames
- Use virtual try on





DIGITAL TOOLS | SKILLS CHECK

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)



Let's review...

What are you most excited about??

Who can role play what the OD hand off looks like, incorporating Lens Simulator?

Do you have to use Lens Simulator with everyone?

How will Smart Shopper enhance the patient experience?

Who do you call, or what app do you use if you're having issues with the applications?

EYERULER 2

Using Eyeruler 2+ with **ALL** patients creates value in you and your practice and will provide the best visual experience possible paired with your preferred lens design, coatings & features!



EYERULER 2

What measurements will be captured?	EyeRuler 2+ Required
<p>Use site iPad to launch EyeRuler 2+ from Ciao! Optical!</p> <ul style="list-style-type: none">• Sensor attaches on frames• Provides specific details such as:<ul style="list-style-type: none">• Box Measurements• PD/Seg/OC• Wearers Position• Wrap Angle, Pantoscopic tilt, Vertex Distance• Near Vision Behavior• Integrated into Ciao! Optical	<ol style="list-style-type: none">1. Varilux Comfort Max Fit, X Fit, and XR, and XR Track2. Eyezen Start & 1-43. Authentics (Ray-Ban, Oakley, and Costa)4. All Digital SV Lenses<ul style="list-style-type: none">• Blue Light• Transitions

LIVE DEMO

Let's review together:

- EyeRuler 2
- Tools & Resources
- Leonardo modules



EYERULER 2 | PRACTICE

- Launch through Ciao!
- Capture image
- Show a peer for image review
- Take manual measurements to compare
 - If significantly off, review Troubleshooting guide and image captured to determine how we correct





EYERULER 2 | SKILLS CHECK

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?		

EYERULER 2 | SKILL DRILL



Let's review...

What do you think your biggest obstacle will be??

How can we present it to the patient?

True or False, I don't have to direct the patient's head posture?

What will measurements will be impacted if the patient holds their chin high?

True or False, I am required to use it with all patients?

LIVE DEMO

Let's review together:

- Special order frame
- Wellness
- Accessories



WELLNESS & ACCESSORIES | SKILLS CHECK



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



How is everyone feeling?

WELLNESS & ACCESSORIES | SKILL DRILL



Let's review...

Will my frame be ordered if I don't see a moving truck next to the name??

What will happen if you don't attach a provider?

What do you do if they aren't our patient, but want to purchase cleaner?

True or false, I have to use the UPC on the back of the product?

True or false, I am required to use it with all patients?

PAYMENT OVERVIEW

Payments Accepted

- Cash
- Check: payable to **Basden Eye Care**
- Credit including American Express, Master Card, Visa, Discover
- Debit
- Apple/Samsung Pay with patient Card linked
- HAS/FSA sponsored by major credit card

Can not tender Cash from the iPad!



TENDER THE SALE

Ciao! Receipts

Lunet Espace Vision Quebec City T14
1570 Bd Lebourgneuf
Quebec, QC G2K 2M4
Canada
418-626-1234
TPS/TVA 737-251937RT0001 TVQ 1227101632TQ0001

de Recu 2000038
Date : 02/24 à 8:56 AM
Magasin : 29141 Caisse : 2
Caissier : Team 290014
Vendeur : 290014 (Team)

Article	Qnt.	Prix	Montant.
Commande Client: Test Patient			
Commande: 10000443229141			
S/ VAT Trans: GENI Brown PremAR (Plastic)		345.00	345.00
20500001682617 1			
Single Vision Digital			
Anti-Scratch			
DST Processing			
Photochromic Brown			
Premium Anti-Reflective			
Scratch Resistant			
UV Protection			
One Year Eyewear Protection Plan			
Sales Order 10000443229141 [Lens]			
RA7072_Blk_Clr_5/18/140			
Progressive XVP Right			
Plastic 1.60 BlueIQ Clear			
Progressive XVP Left			
Right Hand Design			
Scratch Resistant			
UV400 Blue IQ Clear			
Blue IQ Clear			
Subtotal	USD\$ 25.23		
Tip:	5.78		
Total	USD\$ 29.01		

Thanks for supporting local business!

THANK YOU

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

Sous-total 380.00
GST 0.00
GST 3.49
Comptant Total 383.49 192.00

COD 191.49
Monnaie 0.00

Garantie : Notre objectif est la satisfaction à 100% ! Si vous n'êtes pas entièrement satisfait de votre achat dans les 30 premiers jours, faites-le nous savoir. Nous sommes déterminés à faire les choses correctement.

Credit Card Receipt



Vision Care Benefit Summary

Vision Care Benefit Summary

Customer:	Plan Name:	Plan Type:	Brachman, Susan																																																		
Merchant ID:	Plan Name:	Plan Type:	SPECTRA 2.0 IC																																																		
Terminal ID:	Plan Name:	Plan Type:	Assessment																																																		
Transaction ID:	Plan Name:	Plan Type:	1208558																																																		
Type:	Plan Name:	Plan Type:																																																			
PURCHASE	Plan Name:	Plan Type:																																																			
Number: XXXXX00000000041	Plan Name:	Plan Type:																																																			
Entry Mode: Skipped	Plan Name:	Plan Type:																																																			
Card Type: DISCOVER	Plan Name:	Plan Type:																																																			
Response: APPROVED	Plan Name:	Plan Type:																																																			
Approval Code: 819543	Plan Name:	Plan Type:																																																			
Sub Total: USD\$ 25.23	Plan Name:	Plan Type:																																																			
Tip: 5.78	Plan Name:	Plan Type:																																																			
Total: USD\$ 29.01	Plan Name:	Plan Type:																																																			
Retail Price Plan Savings* Amount Due**																																																					
\$954.91	\$602.93	\$351.98																																																			
<table border="1"> <thead> <tr> <th>Retail Price</th> <th>Plan Page</th> <th>Plan Discounts</th> <th>Copy</th> <th>Amount Due</th> </tr> </thead> <tbody> <tr> <td>\$140.00</td> <td>\$97.20</td> <td>\$72.80</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td>\$462.93</td> <td>\$60.00</td> <td>\$402.94</td> <td>\$275.00</td> <td>\$274.99</td> </tr> <tr> <td>\$183.31</td> <td>\$0.00</td> <td>\$180.32</td> <td>\$0.00</td> <td>\$62.99</td> </tr> <tr> <td>\$105.34</td> <td>\$0.00</td> <td>\$42.34</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td>\$35.33</td> <td>\$1.00</td> <td>\$33.83</td> <td>\$14.00</td> <td>\$14.00</td> </tr> <tr> <td>Subtotal</td> <td>\$954.91</td> <td>\$216.70</td> <td>\$673.23</td> <td>\$351.98</td> </tr> </tbody> </table>				Retail Price	Plan Page	Plan Discounts	Copy	Amount Due	\$140.00	\$97.20	\$72.80	\$0.00	\$0.00	\$462.93	\$60.00	\$402.94	\$275.00	\$274.99	\$183.31	\$0.00	\$180.32	\$0.00	\$62.99	\$105.34	\$0.00	\$42.34	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$35.33	\$1.00	\$33.83	\$14.00	\$14.00	Subtotal	\$954.91	\$216.70	\$673.23	\$351.98
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Subtotal	\$954.91	\$216.70	\$673.23	\$351.98																																																	

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

Order Ticket

Brachman, Susan

6196989203
Suz.Deadham@yahoo.com

Tray Ticket Blue
Store 0410

1 of 2

105315540410

PRESCRIPTION

OD/OS	Sph	Cyl	Axia	Prism
OD/OS	-4.00	-0.25	165	
OD/OS	3.25	0.05	015	
OD/OS Add	-0.00			
OD/OS Add	+2.00			

Recommendations: AR See

Doctor: Payton Knight Other:

FRAMES INFORMATION

Item #	Vendor	Style
80517251629	Ralph	RA7072_Blk_Clr_5/18/140

LENS INFORMATION

OD/OS	PG_XVP_R_1.60_BIQ_Clear_Pres_AE	Plastic 1.60_BiqQ Clear
OD/OS	PG_XVP_R_1.60_BIQ_Clear_Pres_AE	Plastic 1.60_BiqQ Clear

Included Features: Right Hand Design, Premium AR, Blue IQ Clear, UV400 Blue IQ Clear, Scratches Resistant

MEASUREMENTS

For FO	Near FO	Seg Height	OC Height	Thickness
OD/OS				

Save: 759703
2:18 PM, 10/05/2021

EPP Permanent... Yes Selected Declined

Lab Ticket

ELAB Printed: 04/13/2022 04:27:43 pm Sales Assoc: Jackson, David Store: 410 Order #: 1058287810410 Copy # 1

Lens Selection Customer: Pierce, Vivian Phone: (619) 465-8681

Outside Processing - Central Lab - Central Lab Provides Frame Gerber ID 8961

S0410/105828781

Special Surfacing Instructions

ATTACH LENS OPC LABEL(S) TO BACK

Frame: 805659716136 Name: Ralph RA7116, Trt Gnd, 54/16/145 Trt GM Source: Manual FPD A B ED Axis DBL Type: Normal 71.0 \$4.00 42.70 58.40 16.00

Process

Notes:

REPRINT RECEIPT

From Ciao! Optical:

- Immediately after tender
- Or from back office

From Toolkit:

- Via application

Finix Device

- Through terminal



LIVE DEMO

Let's review together:

- Tendering in Ciao!
- Tendering in Finix devices



TENDERING | SKILLS CHECK



- 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 & Staxx Credit Card Machine
 - Credit Card
 - HSA or FSA
 - Check
 - Care Credit

TENDERING | SKILL DRILL



Let's review...

If person A puts something on active orders list, but person B tenders out, who gets credit?

True or false, it's okay if I only take 50% of the payment today?

True or false, If I select the email receipt, it will not print one as well?

Who can demonstrate how to reprint a receipt from the Toolkit App?

True or false, I can email a receipt from Ciao! 6 months after the purchase date?

ORDER MANAGEMENT

Let's review together:

- Order completion screen
- Lab Processing Application
- Order Tracker



SYSTEMS JOURNEY

Glasses Order
Sold in Ciao!



Transmit
Order in LPA



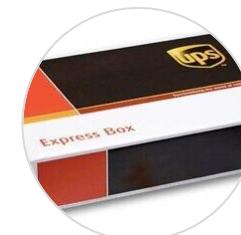
Order Moves to
Order Tracker



Monitor Order in
Order Tracker



Order Arrive at
Location



Order Management



Order Tracker
Completion



Patient Picks
Up Order



Complete Order in LPA
(Order Inspection)



Order Completion

PAST AND FUTURE STATE

New labs:

- RxO
- Insurance Required
- Custom Eyes (1% of orders or less)

Types of orders from RxO:

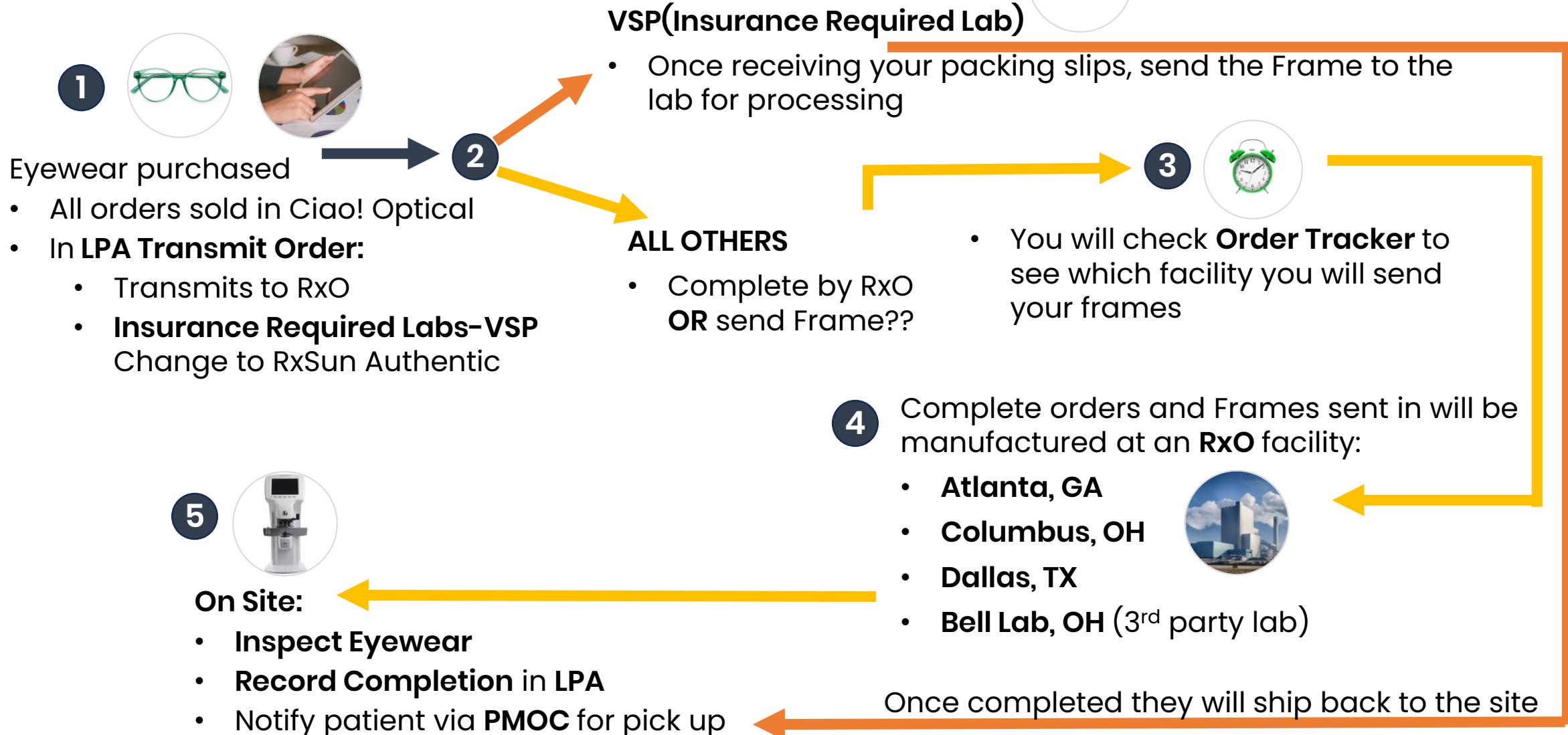
- Complete pair from RxO
- Site sends frames to RxO
- Cut & Edge
- IOF: Uncuts or product to come

Other labs:

- Site sends frames to lab



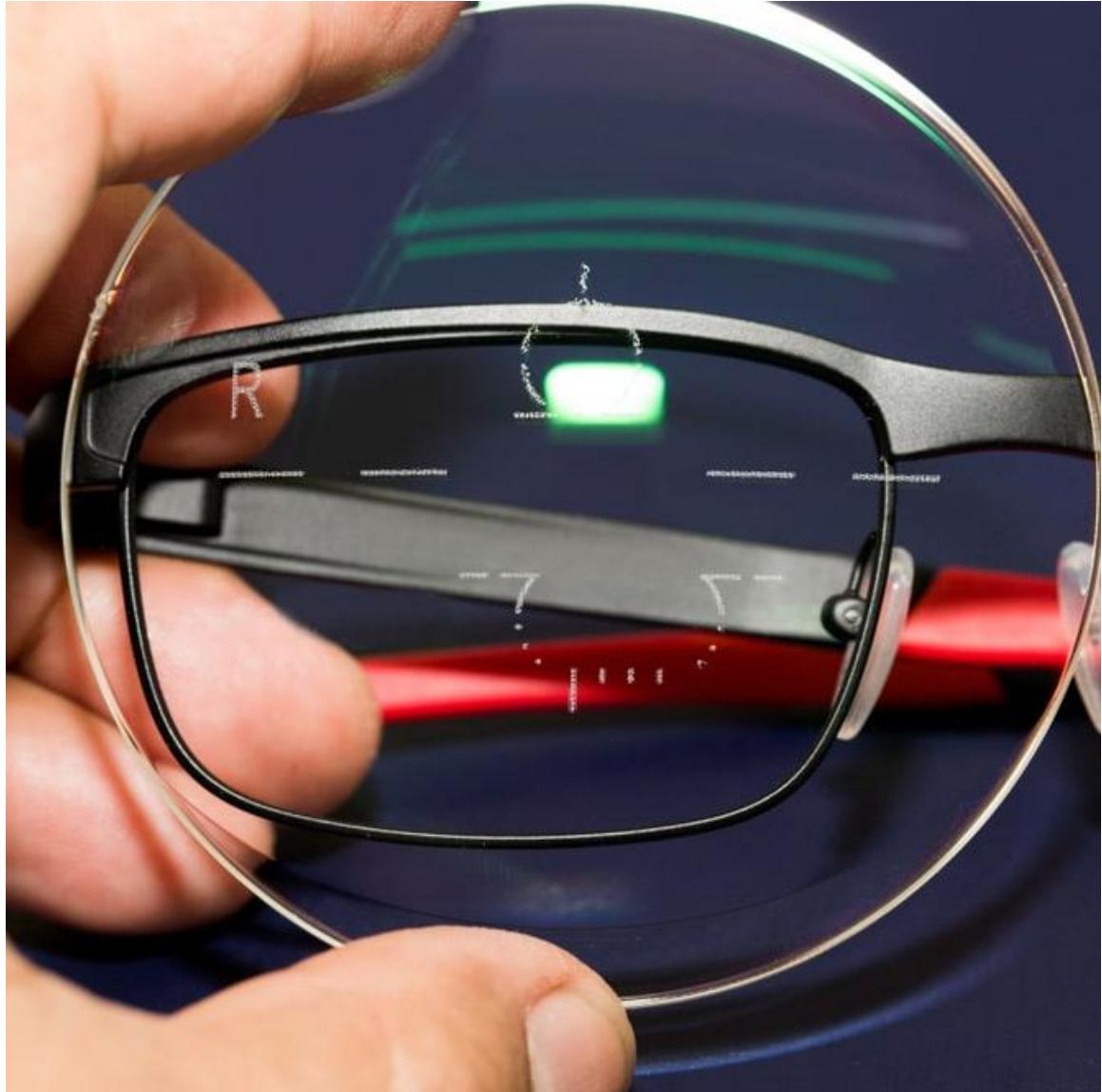
INSURANCE ORDERING FLOW



LAB PROCESSING APPLICATION (LPA)

Transmit Every Order In LPA:

- Prior to transmitting, all measurement and job type changes should be made
- Delete 'staged' orders
- Incoming orders, record inspection within 24-72 hours
- Run Lab Reconciliation report daily



ORDER TRACKER | ORDER DETAILS

CUSTOMER DETAILS		NOTIFICATION LOG			ORDER DETAILS	
First Name	Benjamin	Date/Time	4/21/2023 2:03 PM	Status	Ready - Other	Assoc. Name
Last Name	Gampon					Stoddart, L
Phone No. (Home)						
Phone No. (Mobile)	808-597-0125					
Phone No. (Business)						
Email Address	bensecond7@gmail.com					
Preferred Method of Contact	Text					
CUSTOMER CONTACT						
TEXT	CALL					
808-597-0125						
READY FOR PICKL	OTHER					
SAVE NOTIFICATION						
ORDER DISPENSED						



FRAME TO COME



- Make sure your frame has the temple tag **COMPLETELY** filled 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
- Log In: Network Credentials

ORDER MANAGEMENT

Insurance Required Labs:

- Separate out RxO vs. Insurance labs (classic & southern)
- Clear indicator for orders you're waiting on packing slips vs. in production



ESCALATION PROCESS

- Late orders
- General questions
- If your frame is not matched up by 7th day, you can submit Teams Forms
- Field Leader submits & site should have response within 48 hours
- Order Management guide provides additional details

RxO ESCALATIONS

TeamVision
Eye care, together.

To streamline the RxO escalation process and reduce errors, we are implementing a new RxO Escalations process, beginning on March 30th, 2025.

- This enhanced process will provide greater visibility into RxO manufacturing gaps while offering additional insights and reporting to drive long-term resolutions and improve efficiency.
- Click [HERE](#) to watch a video to understand why this process is changing.

There are three main steps in the process:

Step 1: Site	Step 2: Field	Step 3: RxO
<ul style="list-style-type: none">• Site enters order details on Teams Form to send to Field Leader	<ul style="list-style-type: none">• Field transfers data to Jotform for Escalations Team to receive	<ul style="list-style-type: none">• Escalations Team emails update to site & Field with 48 hours

SITE TO COMPLETE:

Step 1: Complete the Teams Form- RxO Escalation Form

1. Review Order Tracker & Order Management Guide found in **Toolkit** to attempt to solve prior to beginning escalation process.
2. If escalation is needed, locate your Field Leaders [Teams Form](#).
3. Complete the [Teams Form](#) using the directions provided within the form.

New Process

Selecting The Correct Escalation Reason:
Note- you will be prompted to enter different data based upon the reason you select.

Escalation Reason	Example Scenarios
Late Order (Service Promise)	<ul style="list-style-type: none">• Late order (10 days since tender date).• Service promise date changed multiple times (2/20, 3/1, 3/10).
New Process Store Sends Frame	<ul style="list-style-type: none">• On the 7th day, you can provide your UPS Tracking Number if your frame has not been updated as 'received' in Order Tracker.• Prior to submitting, confirm the frame was shipped using correct protocols AND shipped to the correct lab.
Quality Inspection Errors- No Remake Submitted	<ul style="list-style-type: none">• Order was rejected in LPA during the Inspection (e.g. ordered seg height at 20mm, manufactured at 24mm).
Quality Inspection Errors- Remake Submitted	<ul style="list-style-type: none">• Order was completed in LPA and at dispense you notice a flaw (e.g. ordered green transitions and they are gray).
Makeability Ranges	<ul style="list-style-type: none">• Order was cancelled but Ciao! allowed you to place the order and shows in range on Lens Portfolio Guide.

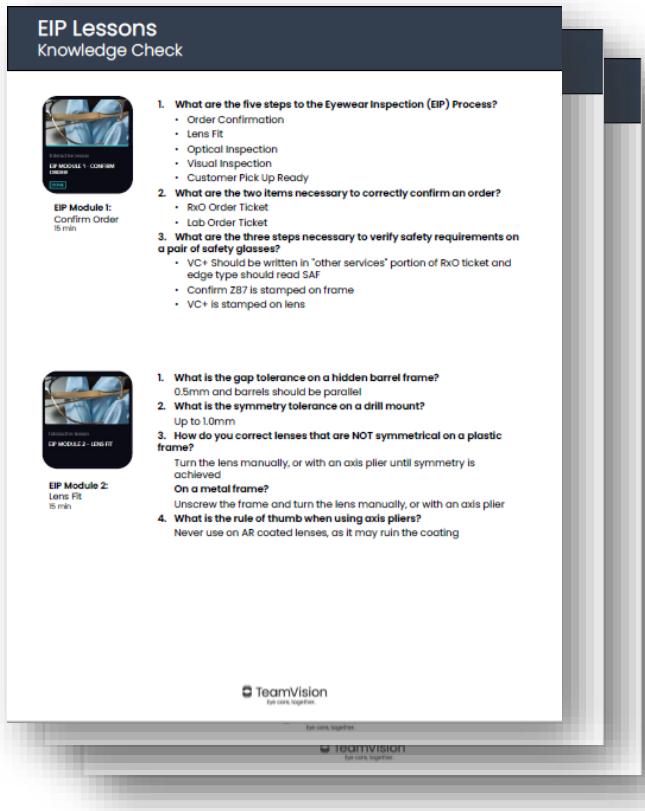
1

Toolkit > Documents > Lab > Order Management Folder

EYEWEAR INSPECTION PROCESS (EIP)

30- 45 Days Post Conversion

Completed on Leonardo using Luxottica Network Credentials



EIP Module 1:
Confirm Order
15 min

EIP Module 2:
Lens Fit
15 min

EIP Module 3:
Digital or Manual
Optical Inspection
1 hr 10 min

EIP Module 4:
Visual Lens Inspection
15 min

EIP Module 5:
Customer Pick up Ready
15 min

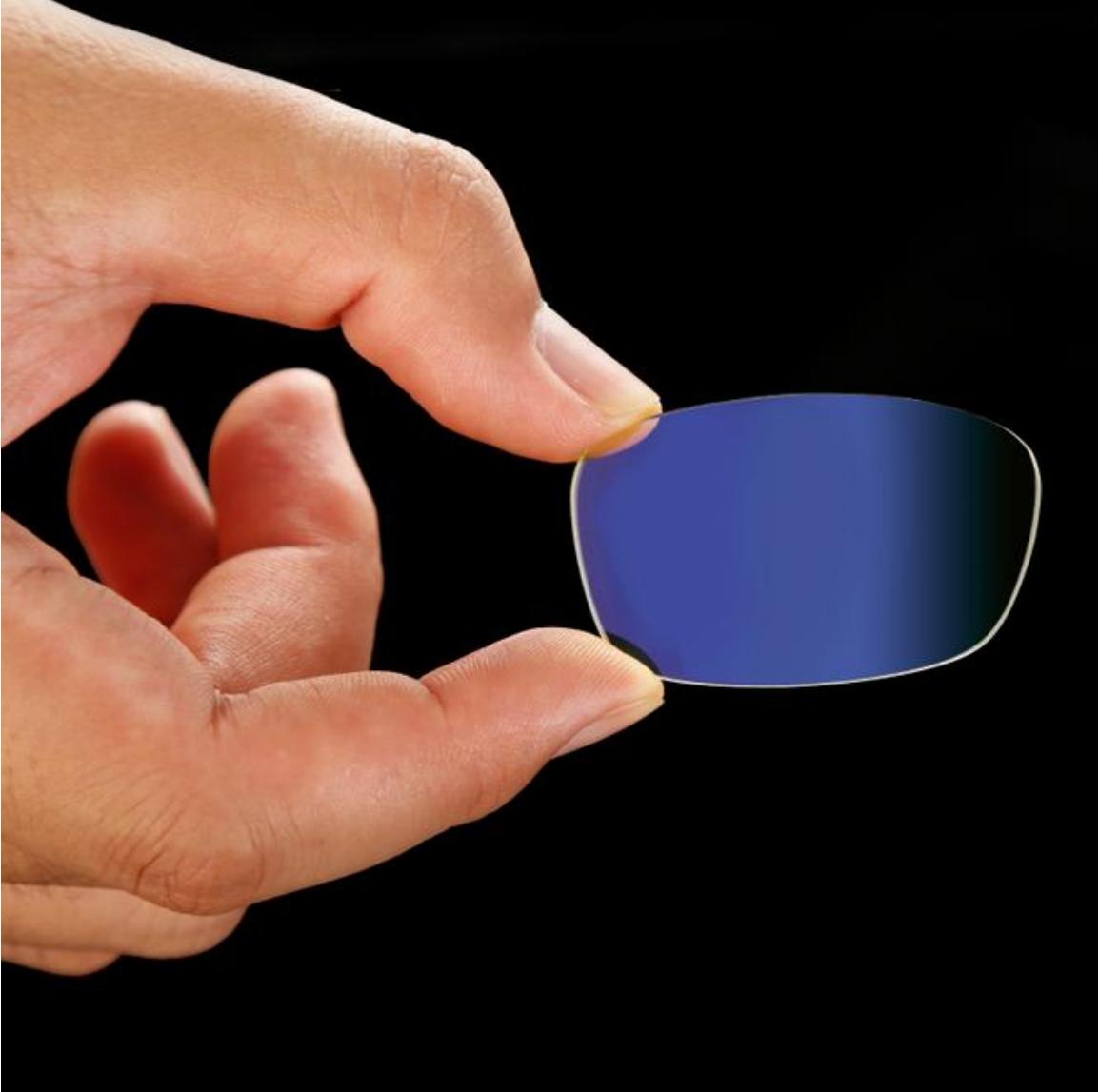
EIP Module 6:
First Inspection Full-
Service Labs
1 hr 20 min

OPTIMIZED LENSES

Optimized Lenses will be:

- Digital lenses
- Authentics (Ray-Ban, Costa, Oakley)
- Wrap frames

The lab will provide an adjusted RX when Inspecting the Eyewear



CHECKING OPTIMIZED LENSES

Initial Rx:

Sphere & Cyl

+1.25 -.25 x095

+1.00

Optimized Rx:

Sphere & Cyl Prism

+1.26 -.28 x095 .75 In & .25 Down

+1.02 .75 In & .25 Down

									
ST049/10025767402		9453367							
ST049 DST		03/ 29							
		Original Order Date: 03/15/24							
		LMS Received Date: 03/18/24							
Store/Rx		Name	Lab						
ST049/10025767402		TVO GREER T049	MCDONOUGH						
DISTRIBUTED BY: Luxottica Optical		100 GRNWD IND PK	MCDONOUGH GA						
		Power @							
Sphere	Cyl	Axis	Prism 1	Prism 2	Add	90	180		
R: +1.25	-0.25	95				+1.00	+1.25		
L: +1.00						+1.00	+1.00		
Seg Location	Material/Color	Lens Style			Vendor				
R:	1.586 GLC POLY	OAKLEY ATT SV			SI ..				
L:	1.586 GLC POLY	OAKLEY ATT SV			SI ..				
PH	PV	PD	Specified Base		DEPT. INSPECT BY: _____				
R: 31.0	23.0H	FR 62.5	R:	+8.50					
L: 31.5	23.0H	NR 62.5	L:	+8.50					
INSP. TOLERANCE									
Sphere	Tol	Cyl	Tol	Axis	Tol	Prism 1	Prism 2	PD	Tol
R: +1.26	0.13	-0.28	0.13	95	7	0.751 0.25D		3.2	2.6
L: +1.02	0.13					0.751 0.25D		3.3	3.3
Other Services									
Special Instructions									
MC5 AR UV									
OAKLEY ENGRAVING									
07-029 RX SOFT VAULT LARGE									
Tint				COSMETIC INSPECT _____					
Frame Status: SUPPLY				OPTICAL INSPECT _____					
Frame: oo9188 polished whit 59 12 918803 133				174057 0009188 R / L					
Eye: 59 Bridge: 12 Temple: 133 A= 60.56				B= 40.60 CIRC=176.4 176.4					

ORDER MANAGEMENT RESOURCES



- Transmit Orders
- Job Type
- Lab Assignment
- Service Promise
- CARE Unit
- Order Status

ORDER MANAGEMENT

Operations Guide

LIVE DEMO

Let's review together:

- LPA
- Order Tracker
- NOVG



ORDER MANAGEMENT | SKILLS CHECK



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)

ORDER MANAGEMENT | SKILLS CHECK



Contacts:

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

ORDER MANAGEMENT | SKILL DRILL



Let's review...

Who can demonstrate the trial lens process in NOVG?

How do we know if it's a patient trial or office restock?

True or false, in Order Tracker, open orders tab will notify me of a late order?

True or false, all orders need to be optically inspected by an FIC certified team member?

True or false, all orders need to be 'dispensed' out in LPA?

AFTER THE SALE

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.

- We stand behind our product and will replace any defective lenses or frames.
- Doctor Prescription Exchanges (90 Days)
- Cataract Surgery Exchanges (6 Months)

Leverage digital tools & your consultative selling skills!



AFTER THE SALE | CONTACTS

Ciao! Optical:

- Returns only
- Return > Reprocess > Tender together

Specialty Lenses:

- Follow vendor exchanges and returns process

*Exam Services should never be returned



AFTER THE SALE | CONTACTS

Soft Lenses:

- Must have product if home shipped/delivered
- Shipping issues can be re-ordered
- Make detailed notes in patient file
- Put boxes aside for recall at a later date
- Can not be boxes that are damaged, expired, written on, or have stickers on them



AFTER THE SALE | EYEGLASSES

Ciao! Optical:

- Exchange or Return
- EPP

Troubleshooting:

- Eyewear Analysis Form
- EyeRuler2 images

RTFT Program:

- Optical captain
- Reporting available



RETURNS & EXCHANGES

EXCHANGE

Are you sure you would like to exchange items for this order?

Exchange (2 drop down options)	
Service Quality	Restyle Frame (Fit/Look)
	Restyle Lens (Type/Material)
	Dr Rx Change
	Rx Entry/Measurements Correction
	Order Cancelled (Not Available/Out of Range)
	ATF Price Adjustment
Product Quality	Frame Flaw
	Lens Flaw
	Lens Not Made to Order
	Damage Replacement

RETURNS & EXCHANGES

Bugs Bunny 

Frame Order Worksheet Order Completion

Category	QTY	Item#	Description	Retail Price
Frame	1	679420888507	PR 0105 55 CONCEPTUAL, Trt Brn, Brn G P	\$310.00
TOTAL: \$310.00				

Main Promotion

Current Offer:

Deal Code: 

Associate Sale

Promotion Savings \$0.00

YOU PAY: \$310.00

Quote valid through: September 1, 2021

 Customer Order

Location 29003 290015 [Logout](#)

Active Virtual [Order Number, Customer Name](#)

Name	Type	Order Progress	Business Date	Status	Associate Id
Bugs.Bunny			8/2/2021	Ready	290015 
Aug.TV3			8/2/2021	In Progress	
Aug.TV3			8/2/2021	In Progress	
Finance.Comp			7/30/2021	In Progress	290031 

(Order Total = 4)

 Customer Order

Location 29003 290015 [Logout](#)

TENDERING EXCHANGES

- Tender as you would a normal sale
- Must use original form of tender for credit cards
- For cash (small amounts and if you have enough in the drawer to maintain business), you can refund with cash
- For checks, large cash amounts, or if the original card is not available, you will use a Home Office Refund Check



FRAME DISPOSITION

Your **Frame Recovery Box** is a place in the office to store all Frame Returns, Exchanges & Damages with a copy of the receipt.

- Daily-damage the product out
- Weekly- PM will sign off on damages
- Monthly- send back to NAASC

Details found in **Inventory Management Guide!**



LIVE DEMO

Let's review together:

- Exchanges
- Returns





AFTER THE FACT | SKILLS CHECK

- 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

AFTER THE FACT | SKILL DRILL



Let's review...

Show us how to do a complete pair EPP.

Do you have to make a note in the patient profile?

True or false, for specialty lenses, I have to wait to send it back to the vendor?

True or false, I can throw the damaged product away?

True or false, there is a video I can watch to see how to process the exchange?

DISCOUNT SCENARIOS | SKILLS CHECK



- Patient wants to restyle the frame within 30 days. The current promotion has ended. What discount code do you use?
- Patient is purchasing a Prada frame, that is restricted from the current promotion but the team member didn't realize this-what do you do?
- The OD is changing a CL Rx. The team member looked at the wrong line on the CL price card and the total is more than you originally quoted-what do you do?
- The new promotion code isn't working-what do you do?
- Tell me three things on the discount card.
- Manager Discretion- what is the difference between a line item vs. total % discount?
- With an EPP, do you need to apply the same discount as the time of sale?