Routine & Non-Insurance

❏ Access The Patient Either From The **PATIENT** By Selecting INVOICE Or **OPTICAL CHECKOUT TAB** By Selecting The Patient And Then ADD INVOICE

❏ Upon Completion Of The Exe Exam, Your Doctor Will Send Over Procedural And Diagnosis Codes.

❏ If They Do Not Come Over, Or You Need Add Additional Services, You Can Manually Enter By Using The Pull-down Bars And The Professional Services Button On The Bottom Left Side Of The Pop-up Window

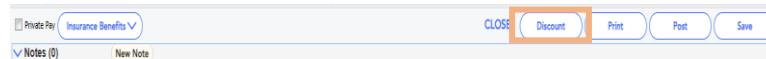❏ If you need to delete a service, select the hamburger on the right side

❏ For All Routine & Non-insurance, Patients, Select The Discount Button To Zero Out The Invoice

❏ Once Discount Window Pops Up, Select The Item(s) You Want To Discount And Fill Out The Reason, $ Or %, And How Much

❏ Select Save When Finished
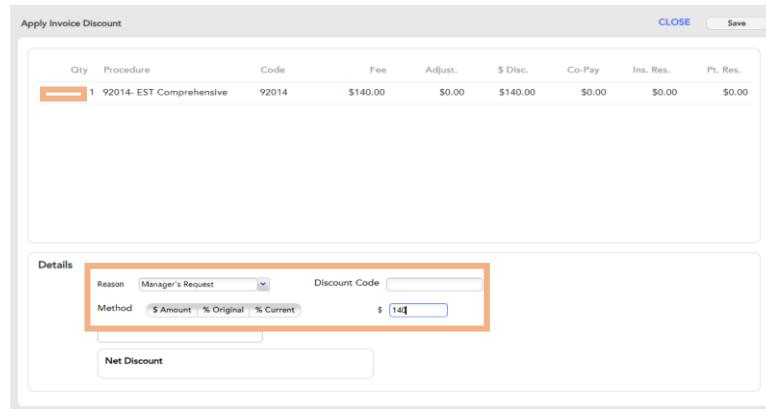
❏ Post To Account & Proceed To Process/Bill In Ciao!

❏ When promoted about recall, select YES

❏ Refer To **Insurance Binder** If You Have Questions Regarding Routine Plans

Medical Insurance

❑ Access The Patient Either From The **PATIENT** By Selecting INVOICE Or **OPTICAL CHECKOUT TAB** By Selecting The Patient And Then ADD INVOICE

❑ Upon Completion Of The Exe Exam, Your Doctor Will Send Over Procedural And Diagnosis Codes.

❑ If They Do Not Come Over, Or You Need Add Additional Services, You Can Manually Enter By Using The Pull-down Bars And The Professional Services Button On The Bottom Left Side Of The Pop-up Window

❑ If you need to delete a service, select the hamburger on the right side

❑ For All Medical Insurance Plans, Eclips Will Auto-calculate The Insurance Responsibility
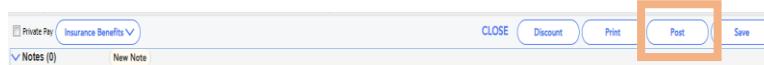

❑ Record Patient Copay By Selecting The Pay Button And Completing The Payment Details

❑ When Prompted About Recall, Select YES

❑   Post To Account & Proceed To Process In Ciao!

❑   Refer To **Insurance Binder** If You Have Questions Regarding Medical Plans

FOR ALL PATIENTS (ROUTINE, MEDICAL, NON-INSURANCE) YOU MUST COMPLETE THE FOLLOWING:

❑   On The **HOME TAB** All Patients Should Be Checked Out (See Scheduling Next Exams Guide For Scheduling Process) And All Invoices Posted By The End Of The Day
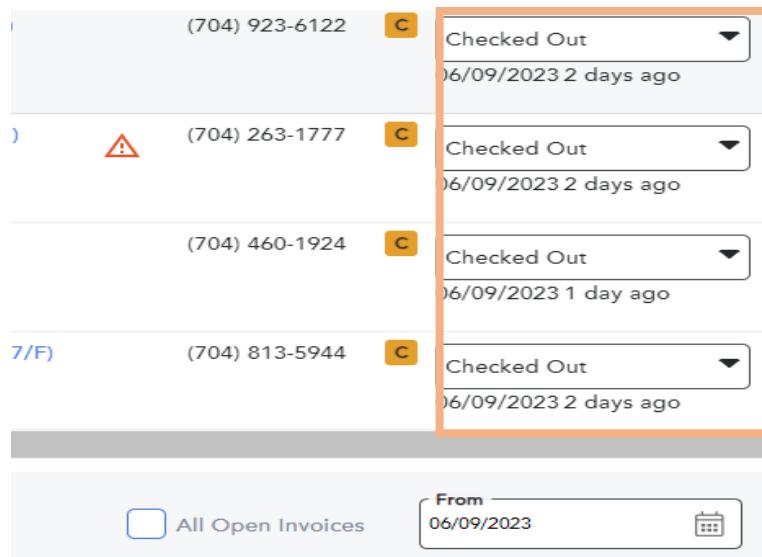
❑   Schedule The Patient Their Tentative Next Eye Exam By Going Back To The **SCHEDULER** And Selecting Check Out And Follow The Prompts