TeamVision
Eye care, together.

All Other EHR Systems:
- ☐ Check Out All Patients
- ☐ Schedule Their Next Exam
- ☐ Complete All Invoicing
- ☐ Prepared Next Day's Patients

ECLiPS:
- ☐ In The **SCHEDULER TAB,** For All Patients Receiving Their Annual Exam, Confirm All Patients Have Been Pre-booked For Next Year (Refer To Scheduling Next Exam Guide)

- ☐ From The **HOME TAB** In ECLiPS, Confirm That All Invoices Have Been Posted
- ☐ If Not, Complete And Post The Invoice
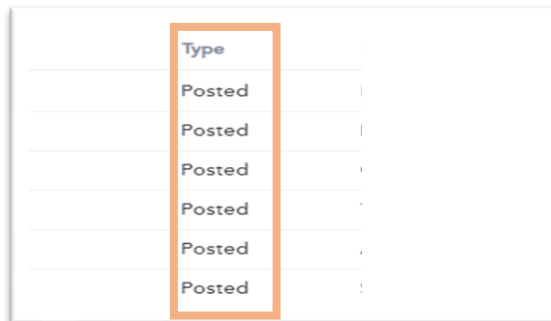
- ☐ Once The Patient Has Completed Their Exam Or Procedure, In ECLiPS, On The **HOME TAB** Select The Pulldown Bar And Take Them From Their Current Status To "Checked Out"
- ☐ **Note:** Some Patients Will Already Show As Checked Out By Pre-scheduling Their Annual Exam
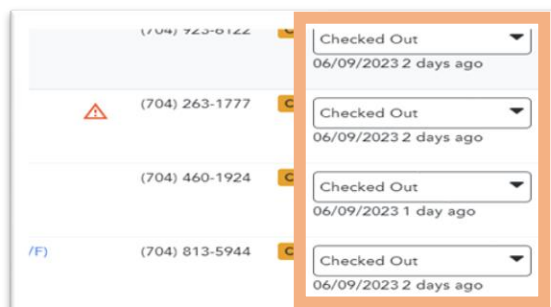
- ☐ Confirm All Glance Sheets And Insurance Are Ready For The Next Day

LPA & Order Tracker:

☐ In **LPA**, Confirm Transmission Of Tendered Orders And Deletion Of Staged Orders

☐ In **LPA,** Run, Audit, And Acknowledge Lab Reconciliation Report

☐ Ship All Frames To Appropriate Labs

☐ Place All Lab Tickets That Were "Completed" (Inspected) And Your Reconciliation Report In Your Daily Closing Envelope

☐ In **Order Tracker**, Ensure All Tray Tickets For Patients That Picked Up Today Are Dispensed Out

☐ Place All Tray Tickets In Your Daily Closing Envelope

Closing Ciao! And Reconciling Funds:

❑ Log Into XStore Back Office

- Count The Till And Enter All Cash/Check/Credit Card Amounts
- Go To Toolkit > Documents > Ciao! Optical > Opening & Closing For Directions

❑ Reconcile Your Cash, Check, And Credit Card Totals By Reviewing The Your Funds Summary In Ciao!

❑ If Correct, Continue The Closing Process

❑ If Funds Are Incorrect, Complete These Steps:

- Audit Your Ciao & Credit Card Recipes
- Log Into Back Office And Review Back-office Reporting To Find Discrepancies

Ciao! Receipts   Credit Card Receipt

❑ Complete Bank Log & Deposit Per Company Guidelines

❑ Force Close Register

❑ Close The Store