

TRAINING CHECKLIST

Conversion & Post Conversion

Site Location:**Operations Manager:**

Ensure all team members have access to:

- Roles in Ciao = Associate Maintenance
- Roles in LPA - See Order Management Guide

Conversion Week Trainer:**Post-Conversion Support:****Known Open Issues:****Notes:**

TRAINING CHECKLIST

Ciao! Optical Sale

PATIENT DEMOGRAPHICS:

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

PRESCRIPTIONS:

- Confirm OD/MD RX when data transferred from Eclips
- Enter a new outside OD/MD and add a new prescription
- Enter the following RX's: SV, PAL, Trifocal, Contacts, Specialty Contacts
- Deactivate an RX

ENTER EXAMS:

*Complete a combination of Cash Pay & Insurance

- Routine Exam (new patient & existing)
- Comprehensive Exam (new patient & existing)
- Contact Lens Fitting
- Medical Services

SELL EYEGLASSES & LENSES ONLY:

- Look up SKU for frame
- Special Order a Frame
- Select various lens options (Transitions, Sun, Clear/ SV, PAL, BF's, Tri)
- Add a lens add on (polish, mirror, tint)
- Attach EPP
- Re-Order the same thing
- Add discounts:
 - Routine discount
 - Employee discount
 - Insurance

CONTACT LENSES:

*Complete a combination of Cash Pay & Insurance, Ship to Site & Home

- Order a year supply of daily lenses
- Order 6 months of monthly lenses
- Add Express Shipping
- Order Specialty Contacts
- Process a Spectera Formulary Contact Lens Order in Ciao (PM only)

TRAINING CHECKLIST

Ciao! Optical Sale

FRAME ONLY:

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

ACCESSORY/ WELLNESS PRODUCTS / CO-MANAGEMENT:

- Look up SKU
- Attach Provider

TENDER:

- Review Xstore and navigate to/from Ciao active orders
- Add discounts:
 - Service Recon
 - Manager Discretion
 - Complimentary Cleaner
 - 15% Off Lenses (complete pair)
 - 2 Pairs of Maui Jim Plano (25% and 50%)
 - 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
- Other Items:

TRAINING CHECKLIST

Ciao! Optical; After the Fact

Remakes/Returns:

- Review Purchase History in Ciao (use above test 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

Contacts:

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

- Other Items:

TRAINING CHECKLIST

Ciao! Optical; After the Fact

LPA & Order Tracker

- 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 (Add Suite 200 for Atlanta)
- Review in UPS Campus Ship how to print lab shipping labels for RxO (3 labs)
- Review RxO Escalation Process (where to get the information for email)
- Review how to enter Order Inspection in LPA
 - Review how to re-order if inspection failed and code re-order correctly
 - Review the difference between re-order in LPA & Ciao! Remake/Exchange
- Ensure LPA jobs have been transmitted or cleared
- Review how to notify a patient in Order Tracker when their order is ready
- Review how to dispense order in Order Tracker
- Remind team they cannot dispense orders in Order Tracker until they have been closed in LPA (close out all lab paperwork for the day prior to dispense paperwork)
- Review in Documents where to find the info

- Other Items:

TRAINING CHECKLIST

Ciao! Optical; Operations

Site Maintenance

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

MIM Fiori

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

Order Supplies

- Office Depot
- UPS Supplies

Kronos

- Review Quickstamp
- View punches
- Request/Approve a change in punches
- Approve your timecard
- Submit a PTO request
- Look up accruals (PTO & Holiday)
- Manual entry of PTO, Bereavement, Covid, ETC.
- PM: Submit payroll & edit timecard

- Other Items:

TRAINING CHECKLIST

Ciao! Optical; Operations

Navigate Back Office:

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

Assets Protection

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

Communication:

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

Documents

- Review pages 1-3
- Dig into Documents
 - Ciao!
 - Pricing & Promotions
 - Lab
 - Contact Lenses
 - Inventory Management
- Other Items:

TRAINING CHECKLIST

Ciao! Optical; Opening & Closing

Open Ciao! Optical:

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

Closing:

- Review that system not integrated and what information will be entered in Ciao
- Review what to do with closing paperwork (receipts, lab, and dispense)
- Review Bank Log and Bank Deposit completed per guidelines
- Review how to print batch report on Staxx Credit Card Machine
- Review bank deposit policy and how to order more deposit slips
- Review who to call if all registers won't close
- Complete end of day and close Ciao:
 - Close out systems – TAB/NEE, LPA, Order tracker
 - Close Store and Registers
 - Fill in closing count
 - Complete a deposit
 - Fill out bank log

Opening/Closing Checklist

ECLiPS & Ciao! Optical

OPENING

Open Ciao! Optical:

- Log into XStore Back Office
 - Open Store
 - Force Open Registers
 - Complete Till Count
- Confirm correct date and that all registers are open

ECLiPS:

- Patient Preparation
 - Confirm all insurances have been verified for the day
 - Print any Glance Sheets that are needed

Order Tracker:

- Review Take Action tab
 - Follow up and communicate with patients when needed

MIDDAY

ECLiPS:

- Patient Preparation
 - For all completed exams, Check Out and Pre-Booked (NEE) in TAB
 - For all completed exams, Complete and Post all invoices

LPA & Order Tracker:

- Inspect and Complete any eyewear within 24 hours of receiving
 - Communicate with patients via PMOC

CLOSING

ECLiPS:

- Ensure all patient have been Checked Out and Pre-Booked (NEE)
- Confirm all Invoices are Completed and Posted

LPA & Order Tracker

- Ensure LPA jobs have been transmitted or deleted
- Run and verify Lab Reconciliation Report
- Ensure all Order Tickets for patients that picked up today are Dispensed in Order Tracker

Open Ciao! Optical:

- Log into XStore Back Office
 - Count the Till and enter all Cash/Check/Credit Card Amounts
 - Reconcile your totals
 - Complete Bank Log & Deposit per company guidelines
 - Force Close Register
 - Close the Store

Daily Closing Paperwork should include:

Patient Receipts, Journal Report & Till totals, Staxx Batch Report, Lab Reconciliation Report and Lab Tickets, Tray Tickets. Store in closing envelopes ordered in CP for 90 days.

Ciao!

- A patient broke their frame & falls under the previous guarantee. The office doesn't have the frame. What do you do?
 - Lux Frame
 - Non Lux Frame
- A patient has a scratched lens and purchases lenses 6 months ago, how do you address this concern?
- A patient's order has gone missing, how do you address the concern?
- A patient picked up their eyeglasses two weeks before conversion and comes in today stating they cannot see. How do you remake their eyeglasses?
- If a patient paid with cash prior to the conversion, but wants to return their eyeglasses, how do we process the refund?
- A patient wants to cancel their EyeMed complete pair from yesterday, what do you do?
- A patient wants to cancel their VSP complete pair from yesterday, what do you do?
- What do you do if you already tendered out the order and notice the following:
 - RX entered incorrectly
 - Incorrect Frame
- Central lab sent the incorrect RX. How do you re-order the eyeglasses?
- Patient states they only want what's covered by the insurance, how do we address this? (Standard AR, Covered progressives, etc.)
- How do you return/ credit back 4 of the 8 boxes of contact lenses