

TRAINING CHECKLIST

Conversion & Post Conversion

Site Location:

Conversion Week Trainer:

Operations Manager:

Post-Conversion Support:

Ensure all team members have access to:

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

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
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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
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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