# TRAINING CHECKLIST
## Check Out

**In ECLiPS:**

**OPTICAL CHECK OUT:**
- ❑ Pick Up Invoice From Home Page
- ❑ Create A Cash (Self Pay) Invoice
- ❑ Create An Insurance Invoice
- ❑ Edit The Invoice (Add A Service)
- ❑ Remove A Service From Invoice
- ❑ Post The Invoice
- ❑ Cancel Invoice
- ❑ Add A Note
- ❑ Check Out & Pre-appoint In TAB
- ❑ EOD Procedures

**In CIAO!:**

**RX TO CIAO!:**
- ❑ Pull Patient From Appointments Tab
  (Note: It Will Be Different Based On Dif Completion)
- ❑ Update PMOC & Language Preference
- ❑ Confirm/Complete RX (OD, CL Info, Type Of GL RX)
  (Note: Specialty CL RX Will Need To Be Manually Entered)
- ❑ Enter Applicable Notes In Demographics

**ENTER MEDICAL SERVICES/ EXAMS:**

Cash Pay
- ❑ Routine Exam (New Patient & Existing)
- ❑ Comprehensive Exam (New Patient & Existing)
- ❑ Contact Lens Fitting
- ❑ Medical Services Only
- ❑ Ensure The Order Is At Ready Status (Ready For Tender)
- ❑ Move Order To Virtual
  - Then Move It Back To Active

All Insurance Carriers
- ❑ Search And Select Insurance Plan
- ❑ Complete Insurance Demographic Information
- ❑ Routine Exam (New Patient & Existing)

# TRAINING CHECKLIST
## CHECK OUT

❑ Comprehensive Exam (New Patient & Existing)
❑ Contact Lens Fitting
❑ Medical Services Only
❑ Enter Plan Pays, Discounts, And Patient Copay/Responsibility
❑ Ensure The Order Is At Ready Status (Ready For Tender)

**TENDER:**

❑ Review Xstore And Navigate To/From Ciao Active Orders
   (Note: You Can Select Multiple Patients, Services, & Materials)
❑ Add A Service Recon Or Manager Discretion Discount:
   (Note: Only When Directed By OD & PM)
❑ Change Associate In Xstore
❑ Tender/ Collect Payment For All Services
❑ Determine Receipt Printing Options, And Select Appropriately
❑ Review What Prints Where And What Paperwork Is Expected To Print
   (Note: Cash Or Check (Or Zero) Will Not Print A Ciao Store Copy Receipt)
❑ Review Information Need From Ciao & Staxx Credit Card Machine
   - Credit Card
   - HSA Or FSA
   - Check
   - Care Credit

**Note: As A Reminder, All Patients Must Be Invoiced/Processed In Eclips As Well As Ciao! Optical**