

TRAINING CHECKLIST

CIAO! OPTICAL EYEGLASS ORDERING

RX TO CIAO!: (Patient being seen by your OD/MD)

- ☐ Pull Patient Demographics From Appointments Tab
(Note: It Will Be Different Based On DIF Completion)
- ☐ Update PMOC & Language Preference
- ☐ Confirm/Complete RX : OD/MD Name, CL Brand & Diameter, Type Of GL RX & Date
(Note: Specialty CL RX Will Need To Be Manually Entered)
- ☐ Enter Applicable Notes In Demographics

PATIENT DEMOGRAPHICS: (Outside RX)

- ☐ How To Pull Up And Access A Patient's Ciao! Profile From Active Tab
- ☐ Enter A New Customer/ Family Member
- ☐ Review/ Update Demographics
- ☐ Change PMOC
- ☐ Enter A Note
- ☐ Review Lifestyle Info

PRESCRIPTIONS:

- ☐ Add A Outside OD/MD Into Ciao!
- ☐ Add A New Prescription With A Od In Ciao!
- ☐ Enter The Following Rx's: Sv, Pal, Trifocal, Mixed, Soft Contacts, Specialty Contacts
- ☐ Deactivate An RX

SELL EYEGLASSES & LENSES ONLY:

Cash Pay

- ☐ Enter Frame SKU
- ☐ Look Up SKU For Frame And Special Order A Frame
- ☐ Select Various Lens Options (Transitions, Sun, Clear, Non-ar, Non-polarized/ SV, PAL, Bf's, Trifocals, Etc.)
- ☐ Add A Lens Add On (Polish, Mirror, Tint)
- ☐ Attach Epp

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- ☐ Add Discounts:
 - Routine Discount (Current Promo, Multiple Pair, Etc.)
 - Employee Discount
- ☐ Complete Measurements
- ☐ Order Completion Screen
 - Utilize Tray ID
 - Utilize Notes (Enter Blue Tag Info)
- ☐ Ensure The Order Is At Ready Status (Ready For Tender)
- ☐ Move Order To Virtual
 - Then Move It Back To Active
- ☐ Order A Second Pair Of Eyeglasses With 40% Off

SELL EYEGLASSES & LENSES ONLY:

All Insurance Carriers

- ☐ Search And Select Insurance Plan
- ☐ Complete Insurance Demographic Information
- ☐ Enter Frame SKU
- ☐ Look Up SKU For Frame And Special Order A Frame
- ☐ Select Various Lens Options (Transitions, Sun, Clear, Non-ar, Non-polarized/ SV, PAL, Bf's, Trifocals, Etc.)
- ☐ Add A Lens Add On (Polish, Mirror, Tint)
- ☐ Attach Epp
- ☐ Enter Plan Pays, Discounts, And Patient Copay/Responsibility
- ☐ Complete Measurements
- ☐ Order Completion Screen
 - Utilize Tray ID
 - Utilize Notes (Enter Blue Tag Info)
- ☐ Ensure The Order Is At Ready Status (Ready For Tender)
- ☐ Move Order To Virtual
 - Then Move It Back To Active
- ☐ Order A Second Pair Of Eyeglasses With 40% Off

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CIAO! OPTICAL EYEGLASS ORDERING

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)
- ☐ Review Information Need From Ciao & Staxx Credit Card Machine
 - Credit Card
 - HSA Or FSA
 - Check
 - Care Credit