

# 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