

TRAINING CHECKLIST

CIAO! OPTICAL; FRAME & ACCESSORY

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: