

# TRAINING CHECKLIST

## CIAO! MATERIALS; AFTER THE FACT

### CONTACT LENSES

- Specialty Lenses:**
  - Locate Your CL Vendor Account Numbers
  - Call In/Place Order For Specialty Lenses With CL Vendor
- Order Lenses Through Premium Vision/Luna**
  - Order Trials For A Patient
  - Order Trials For Site Stock
- Track/ Log Delays From PV Contact Lenses**
- Shipping To Office: Receive Boxes In Product To Come In Order Tracker**
- Schedule CL Follow Up's In Eclips Scheduler**
- When Shipped To Office, Call All Patients To Pick Up**
- Review In Toolkit >Documents> Contact Lenses> Pricing & Guides> CL Handbook**

### EYEGLASS ORDER TRANSMISSION (LAB PROCESSING APP)

- 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, Etc.)**
- 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, Green Label On Box, UPS Shipping
- 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**

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## CIAO! MATERIALS; AFTER THE FACT

- Review How To Notify A Patient In Order Tracker When Their Order Is Ready
- Review How To Dispense Order In Order Tracker
  - You 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 Toolkit > Lab > Order Management > Order Management Guide > Order Management Guide + Quick Guide

### REMAKES/RETURNS:

- Review Purchase History In Ciao
- 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
- Add An EPP
- 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