

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

TRAINING CHECKLIST

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