

TRAINING CHECKLIST

CIAO! OPTICAL; OPERATIONS

NAVIGATE BACK OFFICE:

- ☐ Edit Team Member Access In Associate Maintenance For Team
- ☐ Review The Differences In Electronic Journal And Electronic Report
- ☐ Reprint A Receipt

ASSETS PROTECTION

- ☐ Deposit old Cash Drawer Funds And Ensure Correct Change/Amounts For New Funds (\$400)
- ☐ Set Up Safe – Follow Instructions On Front Of Safe
- ☐ Set Up Bank Log (Binder)
- ☐ Safety And Other CP Items To Be Set Aside And Team Aware That More Items Coming And To Add To This Box (TVO Partner To Set Up 2-4 Weeks Post Conversion)
- ☐ Print Key Holder Agreements For Needed Team Members Or Doctors
- ☐ Review Credit Card Policy And Order Logs (Keep Log And Card In Safe)

COMMUNICATION:

- ☐ Review How Teamvision Email Is Set Up And How To Access Mailboxes + Addresses
- ☐ Where To Find Email Accounts For All Teamvision (And TVO)
- ☐ Who To Call List
- ☐ Reporting In Toolkit (Teamvision Kpis)
- ☐ Operational Calendar (Shared In Comms)

DOCUMENTS

- ☐ Review Pages 1-3
- ☐ Dig Into Documents
 - Ciao! Folder
 - Pricing & Promotions Folder
 - Lab (Order Management) Folder
 - Contact Lens Folder
 - Inventory Management (Mim Fior) Folder

- ☐ Other Items:

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SITE MAINTENANCE

- ☐ Enter In Maintenance Portal A Request For Instakey
- ☐ Request For Additional Keys Now If Needed
- ☐ Review How To Enter Other Requests:
 - OD Instrument Maintenance
 - General Repairs
 - Other Requests

MIM FIORI

- ☐ Place A CP Order And Review What Is Still Pending (Partner With Ops Manager On Pending)
- ☐ Show How To Complete An Inventory Adjustment
- ☐ Show How To Complete An In-store Damage (I.E. For CL Revenue Expired Or Opened Boxes)
- ☐ Show How To Confirm Shipments And What To Do If Counts Don't Match
- ☐ Show How To Scan And Reprint A Frame Tag Using The Zebra Printer
- ☐ Show How To Look Up A SKU For A Frame With A Missing Tag
- ☐ Show How To Complete Monthly (Min Of Once/Month) Frame Disposition

ORDER SUPPLIES

- ☐ Office Depot
- ☐ UPS Supplies

KRONOS (Coming 2024)

- ☐ Review Quickstamp
- ☐ View punches
- ☐ Request/Approve a change in punches
- ☐ Approve your timecard
- ☐ Submit a PTO request
- ☐ Look up accruals (PTO & Holiday)
- ☐ Manual entry of PTO, Bereavement, Covid, ETC.
- ☐ PM: Submit payroll & edit timecard
- ☐ Scheduler

- ☐ Other Items: