

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: