LEONARDO

Optical Learner's Guide (Conversion)

TeamVision
Eye care, together.

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LEONARDO

Welcome and Objectives

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Welcome to our team! TeamVision is here to help you and your practice be successful. Our Mission is to create a community with a primary focus on promoting and guaranteeing a premium and professional eye care experience in optometry. The patient experience is at the center of every decision we make, and you have a critical role in this!!

Learning Objectives

Having completed their onboarding, new joiners at EssilorLuxottica North America will support the Group mission by being able to:

- Model the values, mission and characteristics of EssilorLuxottica & TeamVision.
- Explain the optimal patient journey and accompanying behaviors to drive success.
- Summarize KPIs and expectations for their role and identify actions to drive results.
- Discover available resources to aid in their development beyond onboarding.
- Engage with key business partners to set short-, mid-, and long-term goals to support their ongoing growth and development.

Using This Guide

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The learner guide provides a day-by-day breakdown of recommended focus areas for your onboarding period. Use this guide side by side with your mentor or hiring manager to stay on track and share your learning progress throughout onboarding. Complete on-the-job training activites with your mentor and use the knowledge check section to assess your confidence and understanding of what you just learned.

Example

Details and timing for each type of learning

Discussion prompts, questions, and activities to check for comprehension

Onboarding Shift One

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Focus For The Day
Welcome to TeamVision! Today you will get to know the team, explore the site, and begin learning in Leonardo. Take notes, ask questions and be ready to practice!

Leonardo, 45m
Complete the following sections in Welcome To TeamVision:
- Welcome
  - Optical Knowledge

Knowledge Check
Practice navigating Leonardo, find a lesson outside of your onboarding that interests you.
Understand your practice's culture, values, and goals

On the Job Training
- Complete an office tour
- Meet the team (including Doctors)
- Learn Kronos basics (clock in/out, request time off, view schedule)
- Ensure access to all appropriate systems
- Get an eye exam and/or shadow interactions with patients
- View the Patient and Customer Journey videos via the Ciao! Optical Toolkit

Knowledge Check
Confirm your schedule for the rest of the week.
What are your Practice Manager's expectations for you in your role?
Practice accessing to key systems identified by your Practice Manager.

Daily Debrief
At the end of the day, review what you learned. What questions do you still have?

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Onboarding Shift One

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Focus For The Day

Welcome to TeamVision! Today you will get to know the team, explore the site, and begin learning in Leonardo. Take notes, ask questions and be ready to practice!

Leonardo, 45m

Complete the following sections in Welcome To TeamVision:

- Welcome
    - Optical Knowledge

Knowledge Check

Practice navigating Leonardo, find a lesson outside of your onboarding that interests you.

Understand your practice's culture, values, and goals.

On the Job Training

- Confirm systems access on Dell side (Insurance portals, E.H.R., Legacy systems, etc.)
- Learn Kronos basics (clock in/out, request time off, view schedule)
- Spend time in Toolkit familiarizing yourself with the Apps available to you
- Practice toggling between your Dell computer & Ciao! computer
- View the Patient and Customer Journey videos via the Ciao! Optical Toolkit

Knowledge Check

Practice accessing to key systems identified by your Practice Manager.

What Ciao Toolkit applications require unique credentials (vs. location) to access?

When do you need to enter your time off requests by?

Demonstrate Daily Timecard Sign-off.

Daily Debrief

At the end of the day, review what you learned. What questions do you still have?

Onboarding Shift Two

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Focus For The Day

Welcome back! Today we will focus on the Ciao Toolkit and its many tools and resources. We will also look more in-depth at the patient and customer journey.

Leonardo, 1h

Complete the following section in Welcome To TeamVision:

- Welcome
    - Ophthalmic Solutions
    - Eye Care Brands
        - Eyezen + Lenses
        - Eyezen Kids

> **Knowledge Check**
>
> Do Eyezen lenses come with Blue Light Filters?
>
> Who might benefit from an Eyezen + Lens?
>
> Describe the benefits of both the Eyezen + lens and Eyezen Kids.

On the Job Training

- Practice Ciao! Demographics & Rx Entry
- Role play
    - Consultative Selling Behaviors
    - Lens Simulator
- Familiarize yourself with the Lens Portfolio Guide
- Familiarize yourself with the Contact Lens Guide

> **Knowledge Check**
>
> Review how TeamVision Email is accessed and understand how your office uses inter-office communications.
>
> Why is Consultative Selling important?
>
> How does the patient benefit when we use the Lens Simulator to educate and set lens expectations?

Daily Debrief

At the end of the day, review what you learned. What questions do you still have?

Onboarding Shift Three

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Focus For The Day

Build upon your optical learning from yesterday by learning about our lens and vision solutions. Understand how the practice expects you to perform your role as an Optical Team Member.

Leonardo, 1h

Complete the following section in Welcome To TeamVision Optical:

- Welcome
    - Eye Care Brands
        - Eyezen Start Lens-Relax and Protect the Eyes
        - Eyezen Boost Lenses-Support Eye Focus Efforts
        - Crizal Lessons

Knowledge Check

How might you recommend an Eyezen lens to your patient?

Describe the benefits of the Crizal coatings.

Role play sharing the features and benefits as you would with a patient (bonus if you use Lens Simulator).

On the Job Training

- Locate the Lens Education folder in the Toolkit & review documents
- Review the Frames Brands in your practice; Find your favorites
- Observe opening and/or closing procedures

Knowledge Check

Demonstrate your Lens knowledge to your mentor or Practice Manager.

Locate various frames in your office.

- Budget-friendly options
- Lightweight options
- Wide eye size
- Narrow Eye size

Daily Debrief

How comfortable are you discussing our various lens technologies?

Onboarding Shift Four

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Focus For The Day

Today you will learn about our Progressive Lens brands. Continue to look for every opportunity to be hands on with the tools and applications used in your location.

Leonardo, 1h

Complete the following section in Welcome To TeamVision:

- Welcome
    - Eye Care Brands
        - Varilux Comfort Max
        - Varilux X Series Concepts
        - Varilux X Series Highlights
    - Patient Journey
        - Fitting & Measurements

Knowledge Check

Describe the benefits of each of these Varilux lenses.

Role play sharing the features and benefits as you would with a patient.

Explain the benefits of Eye-Ruler 2.

Demonstrate Eye-Ruler 2.

Use Eye-Ruler 2 practice scenarios & observation tools in toolkit.

On the Job Training

- Observe and practice taking digital measurements with Eye-Ruler 2
- Continue to practice Insurance entry into Ciao! Optical
    - Exams (Medical & Routine)
    - Contacts (Routine- Auto Calculations & Bill Actual)
    - Glasses (Routine- Auto Calculations & Bill Actual)

Knowledge Check

Why is it important to accurately enter patient information?

What is entered into the plan pay amounts if an item is "covered in full?"

Why must you pull a separate Authorization for Exam & Materials?

Daily Debrief

How do you feel navigating the iPad and desktop in front of a patient?

Onboarding Shift Five

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Focus For The Day

Today will be centered around patient management including insurance, TeamVision Guarantees, and more!

Leonardo, 1h 5m

Complete the following section in Welcome To TeamVision:

- Life in the Practice
  - Compliance
    - HIPAA
    - Medicare/Medicaid FWA
    - The 3R's of Shoplifting

> **Knowledge Check**
>
> What is HIPAA? Why is it important?
>
> What is Medicare/Medicaid FWA?
>
> Why is it important to be aware of Medicare/Medicaid FWA?
>
> Explain the 3R's of shoplifting.
>
> Review the shoplifting policy.

On the Job Training

- Learn how to attach an outside provider to Ciao! Optical
- Practice ordering eyewear in Ciao! Optical (use Training Checklists)
- Continue to practice Insurance entry into Ciao! Optical
  - Exams (Medical & Routine)
  - Contacts (Routine- Auto Calculations & Bill Actual)
  - Glasses (Routine- Auto Calculations & Bill Actual
- Review Eyewear Protection Plan (EPP) documents in Toolkit

> **Knowledge Check**
>
> What insurance does your site see the most?
>
> How does your site calculate insurance?
>
> When should you discuss the Eyewear Protection Plan with patients?
>
> What are the terms of the TeamVision Eyewear Protection Program?

Daily Debrief

Review what you have learned. What questions do you still have? What do you feel you need more time on?

Onboarding Shift Six

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Focus For The Day

Today we will continue to explore the functions of Ciao! Optical and role of insurance in your site.

Leonardo, 1h 5m

Complete the following section in Welcome To Team Vision:

- Life In The Practice
    - Compliance
        - Workplace Harassment
- What's Next

Knowledge Check

What are some of your practice goals/KPI's?

What is capture rate?

How can you contribute to performance metrics in your site?

How will you continue to make learning on Leonardo a best practice?

On the Job Training

- Review Pricing and Promotions in Ciao! Toolkit
    - Practice apply discounts to cash pay transactions in Ciao! & Xstore
- Enter a frame-only order in Ciao! Optical and attach a provider
- Enter a complete eyeglass pair in Ciao! Optical
    - Practice Authentic programs
- Enter a lens-only order in Ciao! Optical
    - Apply Auto-Calculation plan

Knowledge Check

With your mentor or Practice Manager:

- Search and select insurance plans in Ciao! Optical
- Complete insurance demographic information
- Enter plan pays and discounts in ciao

What is an Auto Fire discount code?

Review XStore and navigate to/from Ciao! Optical active orders.

Determine receipt printing options.

Review what prints from Ciao! Optical.

Daily Debrief

Are there any policies and procedures you are unsure about?

Onboarding Shift Seven

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Focus For The Day

Welcome back! Today we will take a deep dive into Ciao! Optical as well as review important Key Performance indicators for your site.

On the Job Training

- Enter a complete eyeglass pair in Ciao! Optical and apply insurance:
    - Apply Auto-Calculation Plan
    - Continue to learn how to do Bill Actual plans:
        - What do you enter into the plan pay amounts for covered in-full items?
        - Review how to process Eyezen Lenses
    - Repeat this process with different frame & lens combinations
- Review your site KPIs, sales goals, and objectives with your Practice Manager
    - Know and understand your role in reaching those goals.

Knowledge Check

What Discounts and promotions can you apply to Ciao! and XStore?

Location processing guidelines for Oakley Frames/Lenses.

Share your knowledge of how to apply insurance.

With your mentor or Practice Manager, demonstrate your knowledge of the patient journey so far.

Daily Debrief

Talk to your mentor or PM about your experience so far. What are you most proud of?

Onboarding Shift Eight

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Focus For The Day

Today is all about Contact Lenses!

On the Job Training

- If you will sell contact lenses:
    - Review the contact lens price card in Toolkit
    - Practice entering CL Rx's
    - Price out various lens options
    - Review which lenses are specialty lenses
    - Apply instant savings
    - Attach insurance to the order
    - Apply Express shipping fees in XStore

Knowledge Check

What are considered specialty contact lenses at your site?

How are specialty contact lenses ordered in Ciao! Optical?

What is the process for ordering specialty lenses at your site?

What Contact lenses are most prescribed at your site?

What is the Contact lens instant rebate?

Order a year's supply of contact lenses.

Daily Debrief

What is your role in ensuring our contact lens patients order a supply from TeamVision?

Onboarding Shift Nine

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Focus For The Day

Today will be focused on Order Management and everything after you tender the eyewear.

On the Job Training

- Review the Order Management Guide in Toolkit
- Learn how to transmit orders in LPA
    - Insurance vs. RxO
- Review and demonstrate the shipping process to RxO
- Confirm transmission of tendered orders and deletion of staged orders
- Review RXO Escalation process
- Observe Order Completion in LPA
- Review Order Tracker best practices with your mentor or Practice Manager
    - Learn how to see which lab to ship your order
    - Find Order Status
    - Learn how to leverage the Take Action page(s)
    - How can you communicate with patients?

Knowledge Check

Why is shipping to the lab the same day so important?

Demonstrate the Escalations process.

Will your patients automatically get text or email notifications?

Demonstrate to your mentor or Practice Manager everything you've learned about Order Tracker.

Explain how you will bring the Patient Experience to life everyday in the practice.

Daily Debrief

Tomorrow is your last official day of onboarding! Talk about your experience so far.

Onboarding Shift Ten

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Focus For The Day

Congratulations! Today is your last official day of onboarding. By now you have the foundational knowledge needed to be successful in your role.

On the Job Training

- Continue to use the documents in the Toolkit (Training Checklists & Guides) to gain confidence with all systems
- Learn any practice specific processes and systems
- Get comfortable selling on the iPad
- Continue to learn and practice the patient journey

Knowledge Check

Complete full interactions with patients and ask for feedback from your team and manager.

Develop a plan with your manager to complete monthly assigned learning content on Leonardo.

Think back on your onboarding journey, is there anything you would like to revisit with your mentor?

Where can you find and keep track of your goals and performance?

Daily Debrief

Time to celebrate! As you complete your onboarding, continue to check in with your manager for feedback and development.

Continuous Learning & Survey

Continuous learning is important to maintain and enhance your knowledge and competencies to expand your skill set and future opportunities. Ongoing development is critical for everyone to reach their full potential. The following lessons should be completed between patients, as business allows.

Leonardo Enrichment Onboarding Path

Upon completion of your Essentials Onboarding Learning Path on Leonardo, you will continue your Onboarding Journey with the Enrichment Onboarding Path directly on Leonardo.

Monthly Assigned Lessons

Regularly check your Leonardo "To-Do" list and the monthly communication to find the mandatory Leonardo lessons and virtual classrooms for each month.

Within 30 Days

Complete *Diversity in the Workplace and r*equired TeamVision Compliance modules in Leonardo.

Within 60 Days

Complete all compliance lessons in the "To-Do" list.

Within 90 Days

Complete the Oakley Expert and Ray-Ban Expert Programs.

Explore additional eyewear content on Leonardo

- Select "Brands" from the top menu, then select "Eyewear Brands"

Feedback Survey

At the completion of your onboarding period, you will receive a four-question feedback survey about your onboarding experience in MyPersonalDesk. Log into MyPersonalDesk, click on your Inbox, and complete the survey within 30 days.

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