LEONARDO

Patient Care Coordinator Learner's Guide (Conversion)

2024 Edition

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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 goals 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
- Introduction to the Practice

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
- Identify important applications most related to your job function
- Practice toggling between your Dell computer & Ciao! computer
- View the Patient and Customer Journey videos via the Ciao! Optical Toolkit

Knowledge Check

Practice accessing 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 first section of the Patient and Customer journey; Check In.

Leonardo, 40m

Complete the following section in Welcome To TeamVision:

- Patient Journey
    - Appointment Booking

Knowledge Check

Describe the Patient & Customer Journey.

What does clear communication sound like to you?

How can you make a positive first impression on the patient?

On the Job Training

- Practice the Front Desk/check-in
    - Scheduling
    - Patient demographics
    - Check-in process
    - Insurance process
    - Scanning documents

Knowledge Check

Review how TeamVision email is accessed and understand how your office uses inter-office communications.

Why is it important to schedule accurately and capture correct patient data?

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 Front Desk/Check In observations from yesterday by learning about Insurance plans. Understand how the practice expects you to perform your role as a Patient Care Coordinator.

Leonardo, 1h 10m

Complete the following section in Welcome To TeamVision Optical:

- Patient Journey
    - Patient Arrival

Knowledge Check

Demonstrate how we welcome patients to our office?

What are the key components of Effective Scheduling?

What are the key components of Checking In our patients?

What is important when managing insurance?

On the Job Training

- Continue E.H.R. training (use Training Checklist found in Toolkit)
- Practice invoicing & patient check out
- Observe opening and/or closing procedures

Knowledge Check

What processes need to change in your office due to new systems?

If a patient has a zero copay, must the data be transferred into Ciao! Optical?

Daily Debrief

Recap key learnings so far. What do you think will be easy, and where might you need additional support?

Onboarding Shift Four

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Focus For The Day

Today you will learn about our Electronic Health Records System (E.H.R.). Continue to look for every opportunity to be hands-on with the tools and applications used in your location.

Leonardo, 45m

Complete the following section in Welcome To TeamVision:

- Life in the Practice
    - Self-Development
    - Compliance Essentials
        - HIPAA

Knowledge Check

Explain the importance of HIPAA.

Review paperwork needed for HIPPA and role play explaining to patient.

Demonstrate understanding of how your practice records/documents HIPPA signatures.

On the Job Training

- Continue/Complete E.H.R. Training
- Learn how to check patient benefits in Trizetto

Knowledge Check

With a peer

- Demonstrate how to schedule, reschedule, and cancel an appointment.
- Demonstrate how to enter insurance details into the E.H.R.
- Demonstrate how to check out a patient.

Daily Debrief

What are you most proud of so far? What are you excited about in your role?

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Onboarding Shift Five

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Focus For The Day

Today will be centered around Compliance & Environmental Health & Safety!

Leonardo, 40m

Complete the following section in Welcome To TeamVision:

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

Knowledge Check

What is Medicare/Medicaid FWA?

Why is it important to be aware of Medicare/Medicaid FWA?

Explain the 3R's of shoplifting.

On the Job Training

- Locate your office's Evacuation Map & learn where your meeting spot is in the event of an emergency
- Review your required Compliance Training due in 30-60 days post hire
- Locate the Environmental Health & Safety Manual in Toolkit
- Continue/Complete E.H.R. Training
- Continue Insurance mastery

Knowledge Check

- What would you do if there was an emergency in the office (flood, fire, patient injury)?
- What will you actively do to keep the office safe and prevent accidents?
- With your Mentor/Practice Manager demonstrate in the EHR:
    - Update patient demographics, Add insurance

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

Building upon the Patient Journey, today we will continue to explore the Patient Check Out process and begin to learn about Ciao! Optical, Point of Sale.

Leonardo, 1h 5m

Complete the following section in Welcome To Team Vision:

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

On the Job Training

- Observe the patient Exam Check Out Process
    - E.H.R Invoice
    - Scheduling Next Exams
    - Ciao! Optical Process
    - Order Tendering
- Practice building patient demographics in Ciao! Optical
    - Eclipse locations: Rx to Ciao!
- Practice transferring the E.H.R services & charges in Ciao! Optical (no insurance)

Knowledge Check

What are some examples of harassment?

What should you do if hear someone saying something inappropriate to a coworker?

Knowledge Check

With your mentor or Practice Manager, demonstrate your ability to (without insurance).

- Complete an Invoice in your E.H.R.
- Build/transfer patient demographics
- Enter services & charges into Ciao! Optical
- Review Tendering process (do not actually tender)

Daily Debrief

What would you like to celebrate? What would you like to revisit and spend more time on?

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Onboarding Shift Seven

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Focus For The Day

Welcome back! Today we will take a deep dive into Insurance & Ciao! Optical.

On the Job Training

- Review office Insurance Binder & Auto-Calculations guides
- Observe mentor/Practice Manager selecting Medical Insurance plan in ciao! Optical
- Practice a Medical Exam only Check Out with Insurance
  - Complete Invoice in E.H.R
  - Select correct Insurance Plan in Ciao! Optical
  - Enter services to Ciao! Optical
- Observe mentor/Practice Manager selecting Routine Insurance plan in ciao! Optical
- Practice a Routine Exam only Check Out with VSP Insurance
  - Complete Invoice in E.H.R
  - Select correct Insurance Plan in Ciao! Optical
  - Enter services to Ciao! Optical

Knowledge Check

Why is it important to enter services into Ciao! Optical?

Demonstrate the ability to select the correct insurance plans in Ciao! Optical.

- Medical Insurances
- Routine Vision Auto-Calculation plans
- Routine Vision Bill Actual Plans (manual plans)

Demonstrate to your mentor/ Practice Manager the cost of the below.

- What is the cost of a medical exam?
- What is the cost of a routine exam?
- Vision Therapy cost?

Continue to practice Insurance entry with the plans your office sees the most.

Review the Tendering process.

Learn how to process Care Credit.

Daily Debrief

Talk to your mentor or Practice Manager about your experience so far.

Onboarding Shift Eight

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Focus For The Day

Putting it all together! Today let's focus on getting confident with the systems and your roll in the office.

On the Job Training

- Complete the Patient Journey from beginning to end (as far as you know it)
- Continue to practice the E.H.R system
    - Scheduling, Check In, & Check Out (Invoicing)
- Continue your learning journey in Ciao! Optical
    - Adding patient demographics, selecting the correct Insurance plan, entering services
    - Practice Bill Actual Insurance plans utilizing your Insurance Binder
    - Learn how to sell Wellness Products & attach an O.D. name and why it's important to do so
    - Walk through the tender process

Knowledge Check

What happens if you don't attach the O.D. name to the Wellness transaction?

Pull a medical invoice from your E.H.R and have your mentor/Practice Manager review your entry into Ciao! Optical.

Pull a Routine invoice from your E.H.R and have your mentor/Practice Manager review your entry into Ciao! Optical (both Auto-Calculation plan & Bill Actual).

Continue to learn the opening/closing processes including prepping for future patients.

Daily Debrief

What would you like to celebrate? What would you like to revisit and spend more time on?

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Onboarding Shift Nine

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Focus For The Day

Putting it all together! Today let's focus on getting confident with the systems and your roll in the office.

On the Job Training

- Continue to practice your E.H.R & Ciao! Optical Skills
- With your mentor/ Practice manager practice how to address:
  - Different ways to connect with patients and demonstrate a positive first impression
  - An upset patient on the phone
  - Tell the patient the O.D. is running behind
  - How to tell a patient you don't accept their insurance
  - Practice telling a patient they are scheduled for their annual exam next year and why exams are important

Knowledge Check

Explain your role in the Patient Journey.

Why is it important to have honest and transparent communication with your patients?

Why are annual Exams important?

If required, demonstrate to your mentor/Practice Manager how to enter an Eyeglass Rx and a Contact Lens Rx.

What are the steps to open and close the location?

If you are expected to do basic pre-screening for the O.D., shadow the Technicians.

If you are expected to enter prescriptions into Ciao! Optical, learn how to enter the Rx.

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

- Show off what you've learned by demonstrating the complete Patient Journey with a mentor/ Practice Manager

- Review your office goals and objectives with your manager. Learn where to find reporting in the Toolkit

- Complete the onboarding feedback survey on MyPersonalDesk

- Learn any practice-specific processes/systems

Knowledge Check

Complete full interactions with patients and ask for feedback from your peers, mentor, and Practice Manager.

Develop a plan with your Practice 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?

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 required 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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