

# ONBOARDING

## Operations Guide

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# ONBOARDING OVERVIEW

## Integration New Hires



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### Onboarding:

- HRBP Partners with Practice Manager and guides team through **Applicant Tracking System (ATS)** to complete preboarding process
  - Completion of the application, background check, Equifax & I9 verification will allow the **EssilorLuxottica ID (ELID)** to be generated
- **HRBP** ensures new hires receive all benefit related information and guides the team through the enrollment process to ensure all eligible new hires complete them in a timely manner and provides continuous support.

2



### Systems Access:

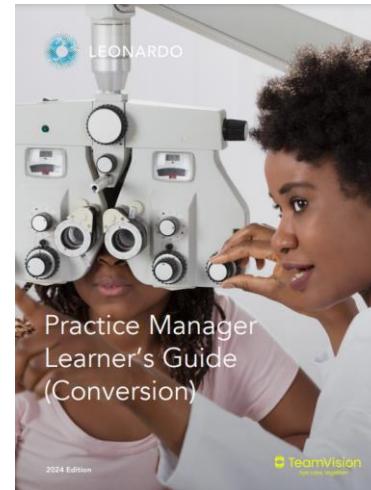
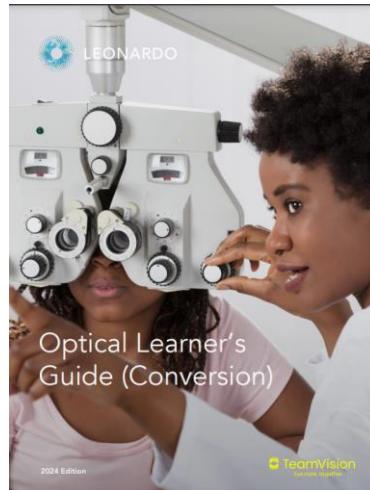
- During conversion week you will be provided & asked to test:
  - ELID & Password
  - E.H.R access
  - Ciao! Systems & Email Access
- Notify your Ops Manager, Practice Manager, or Field Leader if you are having systems issues before calling **Store Systems Support (SSS)**

3



### Leonardo Onboarding

- After Integration week, use Learner Guide to complete assigned Leonardo Onboarding.
- PM to follow up on Leonardo progress and complete **Compliance Training & To-Do List**



Locate the Leaner Guides in Leonardo or [CLICK HERE!](#)

OD's & Contractor ID's follow a different process.

- For OD onboarding information click [HERE](#) or reach out to your HRBP for additional information
- For Contractor ID's step 1 will be different, but step 2 & 3 would be the same as above
  - Contractor ID's will use **Extensis** (not Kronos Timekeeping)



1



### Onboarding:

- PM takes New Hire through **Applicant Tracking System (ATS)** and ensures preboarding is complete and schedules onboarding period in advance
  - Completion of the application, background check, Equifax & I9 verification will allow the **EssilorLuxottica ID (ELID)** to be generated
  - PM will partner with HRBP to facilitate orientation and set expectations. Additionally, will guide new hire through all resources and tools available including benefits enrollment.
  - Identify a mentor who is able to **Coach** and **Effectively** assist the new hire in hands-on activities.

2



### Systems Access:

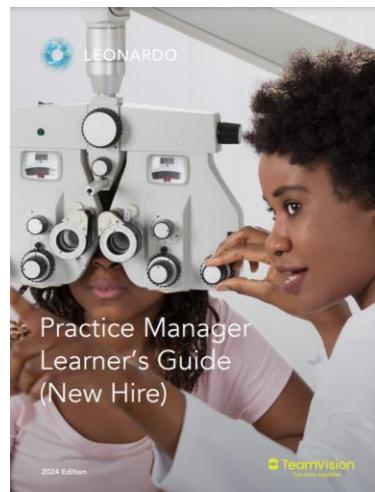
- Once preboarding is complete PM receives an email with new hire ELID
- Utilize **Password Reset App in Toolkit** (log in with ELID & Luxmmddyyyy!)
- Confirm access to Leonardo, My Personal Desk, Kronos, Email access, & Ciao! Systems
  - Call **Store Systems Support (SSS)** for access issues
- Practice Manager must manually set up **E.H.R & NOVG** access

3



### Leonardo Onboarding

- Dedicated, uninterrupted time for E learning completion using learner guide
- PM to follow up on Leonardo progress and complete **Compliance Training & To-Do List**



Locate the Learner Guides in Leonardo or [CLICK HERE!](#)

OD's & Contractor ID's follow a different process.

- For OD onboarding information click [HERE](#) or reach out to your HRBP for additional information
- For Contractor ID's step 1 will be different, but step 2 & 3 would be the same as above
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# ONBOARDING PROCESS

## Internal Transfer/Promotion



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Onboarding for internal transfer or promotions is abbreviated to one week, as they have already demonstrated knowledge and expertise in foundational topics. The goal of their onboarding is to demonstrate and coach the behaviors already known. All activities should be reviewed with their manager to identify additional areas for focus and development.

1



### Onboarding:

- HRBP submits HDA ticket for internal transfer or promotion that would include all details necessary prior to the transition date
  - We will not have to move them through ATS process
  - ELID will remain the same

2



### Systems Access:

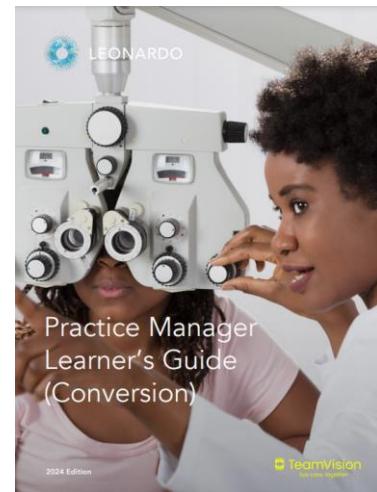
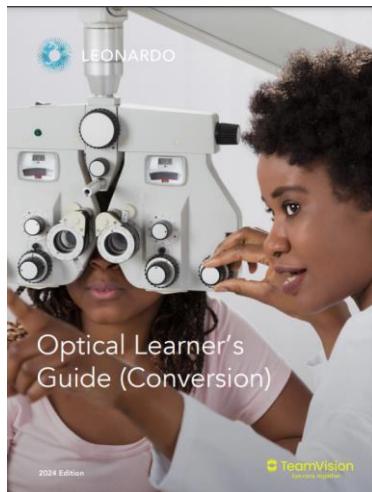
- Once HDA ticket is processed, ensure the same ELID has access to all Team Vision systems including new email address
  - If needed, utilize **Password Reset App in Toolkit** (log in with ELID & **Luxmmddyyyy!**)
- Confirm access to Leonardo, My Personal Desk, Kronos, Email access, & Ciao! Systems
  - Call **Store Systems Support (sss)** for access issues
- Practice Manager must manually set up **E.H.R & NOVG** access

3



### Leonardo Onboarding

- Dedicated, uninterrupted time for E learning completion using learning guide
- PM to follow up on Leonardo progress and complete **Compliance Training & To-Do List**



Locate the Leaner Guides in Leonardo or [CLICK HERE!](#)

OD's & Contractor ID's follow a different process.

- For OD onboarding information click [HERE](#) or reach out to your HRBP for additional information
- For Contractor ID's step 1 will be different, but step 2 & 3 would be the same as above
  - Contractor ID's will use **Extensis** (not Kronos Timekeeping)



Essential  
Onboarding  
Path

Enrichment  
Onboarding  
Path

Compliance  
Training

To-Do List

Additional  
Development

### Assigned Essentials Courses (Due: 3.5 weeks)

- Upon completion of Essentials courses, begin Advance path
- 3.5 weeks from hire date to complete

### Assigned Enrichment Courses (Due 3.5 weeks)

- Begins as soon as Essentials courses completed
- 3.5 weeks to complete from start of Enrichment courses
- Upon completion, begin required Compliance training that is not a part of onboarding (see [PAGES](#) 30 & 32)

### Assigned & Unassigned Compliance Courses (Due 30–60 days)

- Those that are not a part of Essentials & Advanced onboarding paths will have to be searched by user (i.e., unassigned)
- Utilize [PAGES](#) 30–32 for a listing of all required compliance lessons and who needs to complete
- Once completed, begin completion of your To-Do List

### Complete your Assigned To-Do List (Due 90 days)

- There maybe courses that are assigned to you outside of your onboarding path (e.g., Opticians will be assigned Ray-Ban & Oakley Expert programs)
- These are a longer time commitment and are designed to be broken out into bit sized pieces

What else do you need to know to be an expert in your field & continue your learning journey?

- Join Live Classrooms
- Supplement your learning with areas that interest you
- Leaders- use Harvard Business Professional courses for team development

### Tips for Success:

- Rely on the tools: Trainer Guide and Learner Guide are your support to guarantee the basic knowledge and an optimal start for your new team members
- A blended learning approach is followed: lessons and virtual classes on Leonardo, and on-the-job activities together with you or a member of your team
- Keep the show going: share feedbacks, celebrate achievements and build a culture of learning for durable long-term results

Click [HERE](#) to be redirected to Leonardo for a 10 min lesson to review the Onboarding Process

# HR RESOURCES



Your HRBPs have worked hard to create an all-encompassing resource center for onboarding new team members. If you have any questions, please reach out to your field leader or HRBP.

[CLICK HERE](#) to access the  
Managers Flowchart

## ONBOARDING & RESOURCE GUIDE FOR MANAGERS

FLOWCHART



[CLICK HERE](#) to access the  
Team Member Flowchart

## EMPLOYEE ONBOARDING & DEVELOPMENT TOOL





At TeamVision, we pride ourselves on being life-long learners. Providing a positive welcome and onboarding experience will have a direct impact on employee retention.

When it's a positive experience, retention is 82% higher and 69% of new hires will stay with the brand for more than 3 years.



Ever wondered why some new hires hit the ground running?

- They probably had a stellar onboarding experience.

What makes onboarding so crucial?

- It lays the groundwork for a fulfilling work journey.



A positive onboarding experience leads to:

- Increased performance
- Increase in retention
- Higher job satisfaction



When you nail the onboarding, you'll see that Team Members:

- Model the company values
- Explain the optimal patient journey to drive success
- Blend in with the team faster
- Choose to stay with the practice

Jumpstart your new hire's onboarding experience. Make every first day count!

## Manager Responsibilities

Prepare (Before Day 1)	<ul style="list-style-type: none"><li>• Utilize <a href="#">Field Onboarding Checklist</a> (prepare for the new hire's arrival)</li><li>• As a hiring manager, it is your responsibility to make sure the new hire complete Preboarding to avoid delays</li><li>• Ensure new hire has an ELID prior to start date</li></ul>
Warm Welcome (Day 1)	<ul style="list-style-type: none"><li>• Welcome and greet the new hire for their first day and celebrate!<ul style="list-style-type: none"><li>• Coffee and Doughnuts perhaps?!</li></ul></li><li>• Give a store tour and introduce the team including the Doctors<ul style="list-style-type: none"><li>• Share tiny details such as the parking, lunch spots etc.</li></ul></li><li>• Introduce our company values to ensure they are engaged in the store and the brand<ul style="list-style-type: none"><li>• What is your practice known for? What are your practice goals?</li><li>• Have them get an eye exam and experience the Patient Journey</li></ul></li><li>• Review the handbook, policies and procedures and schedule meet and greet with HRBP and Field leaders</li><li>• Identify a mentor who is able to Coach and Effectively assist the new hire in hands-on activities</li></ul>



In the ongoing effort to improve the experience of our new hires, we will be including a welcome letter that employees receive on their first day. This letter from the employee's direct manager will help them to welcome at their home office. In addition, it should provide a high-level overview of how to leverage The Learner Guide & Leonardo E Learnings.

Heightened focus on employee welcoming and onboarding efforts has been proven to lead to higher retention rates. We want to set the tone early of a positive and welcoming company culture.

## 2 Options for the Welcome Letter

1. Email
2. Print

Template can be found in One Drive or via your [HR Onboarding Resource Guide](#).



[Date]

Dear [new employee name],

Welcome to [company name]! We are so excited for you to join us [our practice]. Your [short list of skills and accomplishments] make you the perfect fit for [name of position].

We met during your interview but let me introduce myself again. I am [your name], and I will be your [relationship to new employee]. Feel free to reach out to me with any questions during the onboarding process.

As discussed, your first day of work will be [start date] at [start time]. Please bring two copies of identification and be prepared to complete onboarding paperwork. You will also sit down with your direct manager, [direct manager name], and go over your daily responsibilities. If there's time, we hope to have you meet with [related departments]. As you might have noticed during your interview, our office dress code is [dress code].

Your new colleagues are excited to welcome you to the team in person. [Colleague name] and [colleague name] will be great resources for you during your first few weeks on the job. You'll meet them during onboarding and can ask any specific questions you have during that time and in the coming weeks.

Depending on your role in the office, on your first shift you will leverage your Learner Guide & Leonardo to complete a mix of E Learnings and On-The-Job trainings. The learner guide is designed to guide you through your first 10 shifts. The onboarding path assigned in Leonardo is a two-part path: Essentials to provide you the basics expectations and Enrichment to dig into your role in the office. You will be given 3.5 weeks to complete each section (7 weeks in total.) But learning does not stop there. There will be additional compliance lessons, and a curated To-Do list based upon your title. Your mentor or PM might ask you to self search and complete additional courses based on office needs.

Don't hesitate to reach out at [your preferred method of contact] with any questions about your first day. We look forward to seeing you on [start date]!

Sincerely,

[Your name]

[Your position]

Email template (do not include)



(Date)

Dear **(Name of New Hire)**,

**(Name of Practice)** would like to welcome you! We are excited that you have accepted our job offer. I hope that this letter finds you mutually excited about your new employment with **(Name of Practice)**

We are all very excited about the potential you bring to our organization and the great experience you will show our patients. The entire Staff at **(Name of Practice)** would like to welcome you. Each of us will play a role to ensure your successful integration into the practice.

Today you will get a brief tour of the practice and meet with several employees. We are excited to have you as part of the Practice.

Once again, we're excited to have you on the team and hope you're looking forward to your first day as much as we are.

**(Practice Managers name)**  
Practice Manager – TeamVision

Letter Template (Delete this text before printing)

# PASSWORD RESET & SYNC

## EssilorLuxottica Network



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There are two ways to reset your password, through OneLink or by using the stand-alone App, both located on page 2 of the Toolkit. In both cases, you will need to be on an EL network or VPN.

1



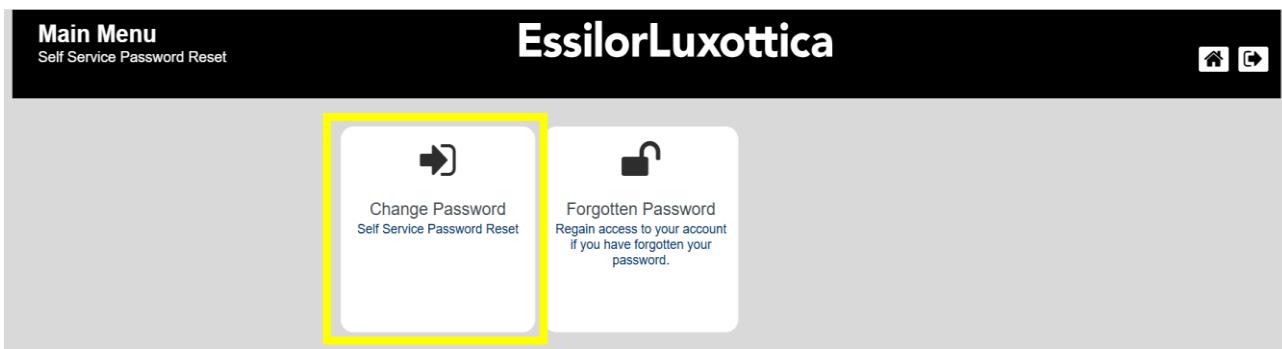
Use OneLink from the Ciao! Toolkit when setting your EssilorLuxottica Network Password.

2

You can also use [CLICK HERE](#). On the new page, enter your six-digit LUX ID along with your network password. First time passwords are set to **LuxMMDDYYYY!** with the date being your birthday.

\*Note capitalization and punctuation

Select **Change Password**



Type your new password using the rules displayed in the text box. **Keep your new password secure!**

**Passwords must have a minimum length of twelve (12) characters and obey the following rules:**

- Mandatory: at least one uppercase (characters from A to Z)
- Mandatory: at least one lowercase (characters from a to z)
- Mandatory: at least one digit (characters from 0 to 9)
- Recommended: at least one special international non-alphanumeric characters such as: ( ) ~ ! @ # \$ & \* - + = | \ { } [ ] : ; < > , . ? /

**Need Help? Ask your onsite Ops Manager!**



EssilorLuxottica ID will sync to Ciao! Optical and other applications/systems **except for Eclips**:

- Hire via Talent EssilorLuxottica with HRBP partnership
- System will email EL ID (and reflect in Kronos)
- Set Password in Ciao! Optical using LUXMMDDYYYY!
- Log onto Leonardo to check password & set time zone

**Field Leader or PM calls SSS and provides required information using the Excel Eclips User Creation Form:**

User Last name	First name	Username (CID or EL ID)	Network Password	Email	Store (If they work at multiple sites, list the primary store # first)	Role TAB (Office User, Office Manager)	Role Connect (Technician, Refractionist, Doctor)	Uprise Role (Administrator, Fill in provider, Front Desk, Office Manager, Optometrist, Technician)
Last	First	XXXXXX	password1234!	XXXXXX@teamvisionteam.com	XXXX; All (XXXX-XXXX)	Office User	Technician	Technician

1. First + Last name
2. ELID
3. Email
4. Store location (List primary location first and then all other locations within the organization\*)
5. Role
  - TAB (Office User, Office Manager)
  - Connect (Technician, Refractionist, Doctor)
  - Uprise Role (Administrator, Fill in Provider, Front Desk, Office Manager, Optometrist, Technician)
6. Network Password (as requested)

SSS creates ticket with the above info and routes to Eclips team for new Eclips account creation

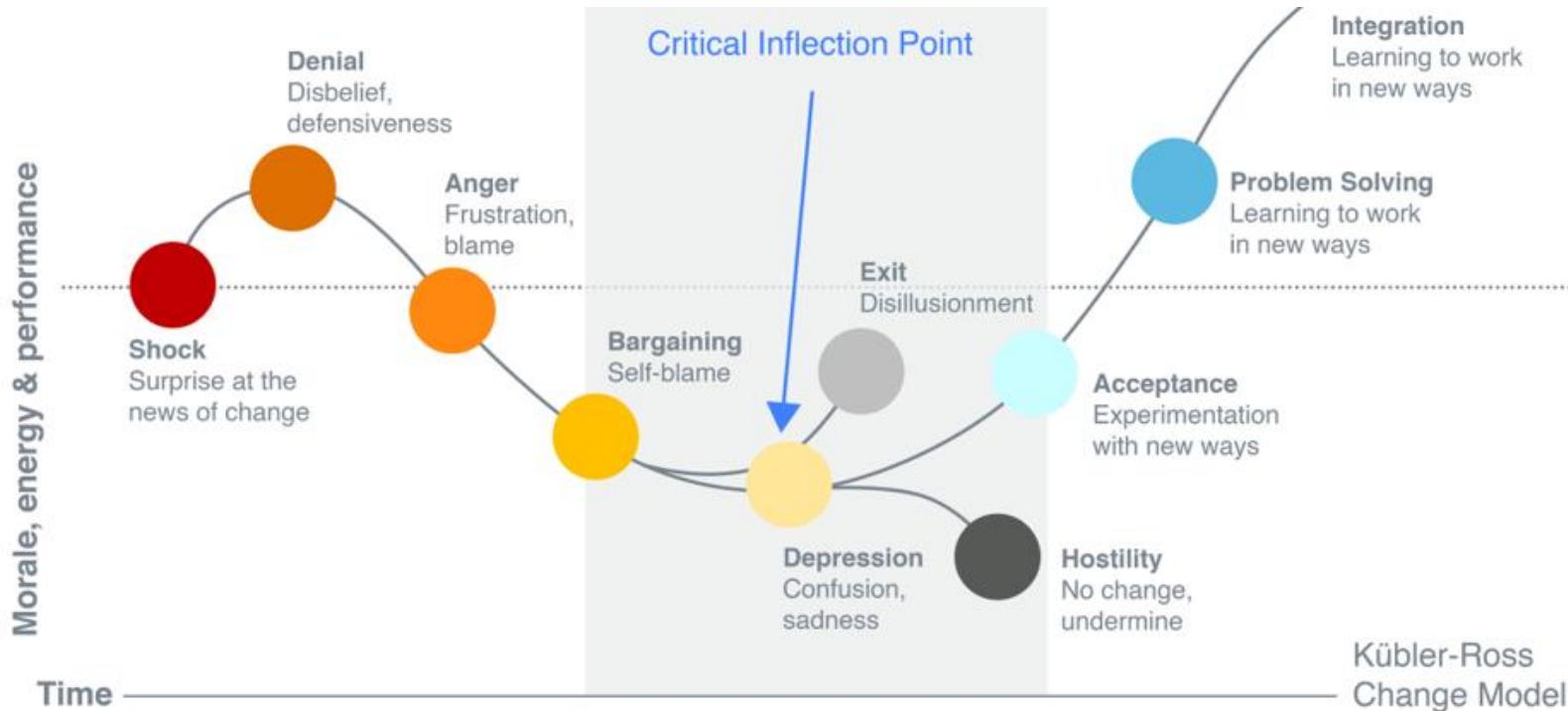
**ETA: 1-2 Business Days, SSS emails when complete the user and the ticket creator**

All other E.H.R. systems will be managed at the site level

- Anyone with Admin rights can add a new user
- Compulink only: email form to Compulink for Cloud access.

# CHANGE MANAGEMENT

## Site Conversion



At the critical inflection point of the change process you can either accept and learn from the change, exit out, or fight back

We know as teams go through the Site Conversion Process; team members may feel different emotions at different times. The Kübler-Ross Change Model, also known as the Five Stages of Grief, outlines the emotional stages people go through when dealing with significant change or loss.

Here are five simple things to know about it:

**1. Five Stages:** The model consists of five stages: Denial, Anger, Bargaining, Depression, and Acceptance. These stages represent the range of emotions people typically experience.

**2. Non-Linear Process:** People do not necessarily experience these stages in a linear order. They might skip stages, move back and forth between them, or experience multiple stages simultaneously.

**3. Universal Application:** While originally developed to describe the process of grief, the model can be applied to any significant life change, including personal loss, illness, job changes, or major life transitions.

**4. Personal Experience:** Each individual's experience with these stages can vary greatly. The duration and intensity of each stage depend on the person and the specific circumstances.

**5. Guidance for Support:** Understanding these stages can help individuals and those supporting them to better navigate the emotional complexities of change. It provides a framework for empathy and support during challenging times.

The goal is to get our teams through these emotions and the conversion process in a supportive manner and acknowledge the changes and feeling they have.



• **Mindsets** are the indicator of our belief and attitude towards our own abilities.

Do I believe that I can successfully go through this change?

**Mindsets** are a key factor that affect how we behave and influence those around us.

Do I have the right attitude to help others succeed through this change?

To thrive in times of change requires the right **mindset... An agile and growth mindset.**

An **agile mindset** is a flexible way of thinking that enables people to react quickly and adapt to changing situations.

Individuals with a **growth mindset** believe that their abilities can be developed. They're eager to learn new skills and adapt to changing circumstances, and they are not afraid of failure.

**The mind is the most powerful tool in any transformation.**

## Agility

- Openness, Collaboration, Flexibility
- Comfortable being uncomfortable
- Continuously learning
- Focus on delivering value
- Recover quickly through change



## Growth Mindset

- Self-aware of mindset
- Self-disruption (defensive to offensive)
- Embrace rather than avoid change
- Value of learning in failure
- Persist despite difficulty

# FIELD CHECKLISTS

## Team Member

# TEAM MEMBER

## Prior to Onboarding



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### PM Checklist Prior To Candidate Start Date

	Stay in contact with the candidate until the first day of work to be sure they have completed all necessary paperwork emailed by EL
	Write on the communication board that who you have hired and when they are starting
	Send out Welcome email to the candidate (found in One Drive)
	Prepare a welcome folder
	Welcome letter from the Practice (found in One Drive)
	Work schedule
	Lunch schedule
	Practice/Team Vision Mission Statement
	LUX ID from PM's my teams in toolkit
	Staff phone list
	TV handbook with important policies highlighted
	Copy of dress code from your practice
	Benefits FT/PT document ( <a href="#">Click Here</a> )
	Company shirt if applicable
	Pen & notebook (order from Office Depot)
	PTO policy & discuss how hours are accrued
	Copy of TV Paydays ( <a href="#">Click Here</a> )
	Copy of TV Holidays ( <a href="#">Click Here</a> )
	Copy of Time and Attendance ( <a href="#">Click Here</a> )
	The day before candidate arrives to work write on your communication board "welcome _____ to the Practice!"
	Be ready to set your expectations & the culture of the Practice on day one



Day One	
	Welcome the candidate
	Introduce the new hire to the team
	Give the new hire a tour of the Practice
	Verify <b>Section 2</b> I-9 documents and enter in toolkit ( <a href="#">Click Here for I9Express</a> )
	Review the welcome folder
	Verify the hourly wage is correct
	Review parking instructions
	Introduce the Practice mission statement
	Review Team Vision handbook (see attached)
	Change the temporary password of LUX ID within toolkit (found in HR Resources Section)
	Add new hire into Revolution/current EHR system and give a temporary password
	Change password within Revolution/current EHR system
	Review Ciao
	Introduce Toolkit
	Review how to log into Kronos
	Review how to clock in/out for the day & for lunches
	Review how to approve timecard after the last punch of the day
	Review how to request PTO
	Review documents folder
	Review the different resources available
	Review My personal desk
	Have new hire check their personal information & be sure it is correct including their bank act
	Review how to view their paycheck on the Wed of payday week
	Review Leonardo Learner Guide & Expectations
	Print the compliance worksheet for Leonardo & start Leonardo compliance videos
	(If applicable) Submit Ticket for Eclips access ( <a href="#">Click Here</a> )
	Remind the new hire to look out for their benefits via email and mail
	Review the benefits handout in the folder for who to contact
	Review Objectives and behaviors for TV



### Week One Check In

	<p>Pm to check back in with the new hire on how they are doing.</p> <ul style="list-style-type: none"><li>• How are they feeling?</li><li>• Do they need anything?</li><li>• Do they have any questions?</li></ul>
	<p>If you do a weekly meeting- be sure to welcome the new hire to their first meeting.</p>
	<p>Check in with the training team member on the progress of training/do they need any assistance from you the PM?</p>
	<p>Celebrate new hires success after first week</p>

Notes, Feedback, 60 day's Objectives.....



### Month One Check In

	Leonardo compliance checklist complete?
	Where is new hire in the training process within their position?
	If you do monthly meetings- be sure to welcome the new hire to the first meeting

Notes, Feedback, 60 day's Objectives.....

# FIELD CHECKLISTS

## Practice Manager



### PM checklist prior to candidate start date

	Stay in contact with the candidate until the first day of work to be sure they have completed all necessary paperwork emailed by EL
	Write on the communication board that who you have hired and when they are starting
	Send out Welcome email to the candidate (found in One Drive)
	Prepare a welcome folder
	Welcome letter from the Practice (found in One Drive)
	Work schedule
	Lunch schedule
	Practice/Team Vision Mission Statement
	LUX ID from PM's my teams in toolkit
	Staff phone list
	TV handbook with important policies highlighted
	Copy of dress code from your practice
	Benefits FT/PT document ( <a href="#">Click Here</a> )
	Company shirt if applicable
	Pen & notebook (order from Office Depot)
	PTO policy & discuss how hours are accrued
	Copy of TV paydays ( <a href="#">Click Here</a> )
	Copy of TV Holidays ( <a href="#">Click Here</a> )
	Copy of Time and Attendance ( <a href="#">Click Here</a> )
	The day before candidate arrives to work write on your communication board "welcome _____ to the Practice!"
	Be ready to set your expectations & the culture of the Practice on day one



### Day One

Welcome the candidate
Introduce the new hire to the team
Give the new employee a tour of the Practice
Review the welcome folder
Verify I-9 documents and enter in toolkit ( <a href="#">Click Here</a> )
Review Time and Attendance ( <a href="#">Refer to page 43</a> )
Verify the hourly wage is correct (Check under <a href="#">MPD</a> – My team tile)
Review parking instructions
Introduce your mission statement
Review Team Vision handbook ( <a href="#">Click Here</a> )
Change the temporary password of LUX ID within toolkit
Add new hire into Revolution/current EHR system and give a temporary password
Change password within Revolution/current EHR system
Introduce existing EHR within the Practice
Review Ciao
Introduce Toolkit
Review how to log into Kronos
Review how to clock in/out for the day & for lunches
Review how to approve timecard after the last punch of the day
Review how to request PTO
Review how to approve timecards at the end of the pay period.
Review resources within the documents folder
Review OT within team and the importance of checking it throughout week
Review maintenance portal and how to use
Review how to add schedules in Kronos
Review LUX email & manager email and how to log in
Review all the different resources available
Review my personal desk
Have new hire check their personal information & be sure it is correct including their bank act
Review how to view their paycheck on the Wed of payday week
Print the compliance worksheet for Leonardo
Remind the new hire to look out for their benefits email and in the mail
Review benefits for FT/PT ( <a href="#">Click Here</a> )
Review key policy and hand keys to PM
Review PM TV CC and what its purpose is
Review CP and how to order supplies
Review Office Depot and provide the username and password



### Week One Check In

	Field Leader to check back in with the new hire on how they are doing during their 1:1 TB. <ul style="list-style-type: none"><li>• How are they feeling?</li><li>• Do they need anything/ Do they have any questions?</li><li>• Have they received benefits info/Do they have any questions?</li></ul>
	Field Leader to check in with the training do they need any assistance from you?
	Review my performance and how to enter the goals
	Send invite for weekly PM meetings
	Explain the weekly PM agenda
	Review the weekly/monthly meeting expectations for their new team including \$12.00 per employee
	Review the who to email document (See attached)
	Review OD schedules and the expectations of it
	Review KPI reporting in toolkit
	Review objectives and behaviors
	Review the Daily report that is emailed daily and how to read it
	Review communication board and what it should look like
	Partner with HR to add PM to Equifax & recruiting access.

Notes, Feedback, 60 day's Objectives.....



### Month One Check In

	Leonardo compliance checklist complete?
	Where is new hire in the training process within their position?
	Welcome the new hire to the first kick off meeting
	Last reminder to sign up for benefits
	Celebrate new hires success after first month as PM

Notes, Feedback, 60 day's Objectives.....

# LEONARDO ONBOARDING



You are assigned an onboarding path when one of these three options occur:

- Site conversion
- New hire
- Promotion or Title Change

On the Leonardo Home Page you will find the assigned on-boarding path. Optical, Patient Care Coordinator, and Practice Manager (APM, PM, LM) are available now. Additional paths will be coming late in Q4 and into 2025.

### Leonardo onboarding details:

- This is a two-part path (**Essentials & Enrichment**)
  - One will begin as soon as you complete the other
- Utilize the **Learner Guide**
  - There will be separate learner guides for Conversion New Hires & and External New Hires (Found in Leonardo)
  - The guide is broken out into the first 10 shifts for the Essentials path (there is no guide for Enrichment modules)
  - By shift, the guide will outline Leonardo Courses to complete along with On-the-Job Training (OJT's)
    - Anyone titled **EyeCare Sales Associate** will be given the Patient Care Coordinator Leonardo onboarding path
    - In the practice, the responsibility of this **EyeCare Sales Associate** can vary from Front Desk to Optical. If your team member will be selling eyewear, click [HERE](#) to view their recommended courses. (Note- team member will have to search & complete lessons)



Locate the  
Leaner Guides in  
Leonardo or  
[CLICK HERE!](#)

**You will be given 3.5 weeks from your onboarding date to complete each path (7 weeks in total). Reporting will be provided to measure completion rates.**

### When to begin:

Internal Integration New Hires	We ask you start your onboarding path during down time, on the Monday following your integration week.
External New Hires	After you welcome your new team member on day one, you will want to get them started on their learning journey in Leonardo.
Promotion/ Title Change	Begin courses as soon as they are assigned. You will get credit for all courses previously completed.

Now available for all Opticians, Managers, & Patient Care Coordinators

**Practice Managers:** You will want to plan and schedule your New Hire onboarding accordingly as you and/or their assigned mentor will have a key role in their OJT's. Prepare any needed materials ahead of time (i.e., observation tools, practice worksheets, etc.)

Click [HERE](#) to be redirected to Leonardo for a 10 min lesson to review the Onboarding Process.



## Compliance Training:

Compliance lessons are required by EssilorLuxottica across all brands on an annual or biannual basis to meet the minimum requirements for all cities and states.

- Some courses will be built into the onboarding path & others must be searched in Leonardo
  - Courses listed on the next slide
- Additional lessons are assigned and communicated to you throughout the year to make completion more manageable.
  - TVOps will provide communication once courses are assigned
  - Some courses require annual or biannual certification
- Field Leaders & PMs are expected to follow up on completions
  - TVOps will send out completion reporting monthly
  - You can follow up in Leonardo for course completion
- Lab locations will have additional lessons to complete



[CLICK HERE](#) to be redirected to a listing of compliance modules by role

# EYECARE SALES ASSOCIATE

## Recommended Learning



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If your Eyecare Sales Associate will be selling eyewear, these are the recommended optical courses.

Category	Duration (min)	Lesson Title – Click to be directed to the lesson
Optical Knowledge	1 hour 40 min	<a href="#">Fundamentals of Optics</a>
	20	<a href="#">Understanding Prescription Information</a>
	15	<a href="#">Understanding Prism in a Prescription</a>
	20	<a href="#">Understanding Lens Power and Prismatic Effect</a>
	4	<a href="#">Introduction to the Eye Structure</a>
	15	<a href="#">Formulas And Mathematical Calculations</a>
	15	<a href="#">Tools And Adjustments</a>
	30	<a href="#">How To Use An Autolensometer</a>
	15	<a href="#">How To Use A Lensometer</a>
	15	<a href="#">Mastering Ocular Anatomy: Advanced</a>
	30	<a href="#">Ocular Diseases and Their Relationship to Anatomy</a>
	15	<a href="#">Dispensing to Children</a>
Patient Care	4	<a href="#">How To Make A Great First Connection</a>
	15	<a href="#">Lens Simulator A Guide For Sales Associates</a>
	22	<a href="#">Smart Shopper Usage Scenarios</a>
	1 hour 4 min	<a href="#">The Customer Experience in Your Practice</a>
	20	Introduction To The Eye Exam
	3	<a href="#">The Three-way Handover To And From The Eye Exam</a>
	4	<a href="#">How To Ensure A Successful Patient Hand-off</a>
	4	<a href="#">How To Ask Your Patients The Right Questions</a>
	4	How To Handle Multiple Patients
	4	How To Overcome Patient Objections
	4	How To Select The Best Frames For Your Patients
	4	How To Present A Complete Vision Solution For Your Patient's Needs
	4	How To Lead Patients To Close The Deal
	20	Managing Referrals in the Practice
	20	Optimizing Patient Flow in the Practice

Click [HERE](#) to be redirected for Lens Product Knowledge

Click [HERE](#) to be redirected to Frame Product Knowledge

# LOCATING ONBOARDING WHEN NOT ASSIGNED



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If you do not have the TeamVision Onboarding Path on your home page, it means it was not pre-assigned, but you will still have the learning path available to you.

Log on to Leonardo to access your TeamVision and follow these steps:

1. Click on *Certificate programs* at the top of the home page.
2. If the WELCOME TO TEAMVISION page is not visible, click on *View all programs*.
3. The CERTIFICATE PROGRAMS page will display all programs, please scroll down until you locate the WELCOME TO TEAMVISION and click to begin your onboarding journey!

**LEONARDO** science for a new vision

**Certificate programs** ▾

Vision care ▾ Brands ▾ Live sessions All content ▾

Follow a program Continue learning

Find the right program for you and make the most of our wide range of content tailored specifically for your needs.

**View all programs →**

**LEONARDO** science for a new vision

Certificate programs ▾ Vision care ▾ Brands ▾ Live sessions All content ▾

**CERTIFICATE PROGRAMS**

Earn certificates and strengthen your knowledge with our curriculum built around your role

Onboarding **WELCOME TO TEAMVISION** E-learning On the job training

Begin your onboarding journey to discover the TeamVision culture and take your first step to delivering the best patient experience.

Program **NUANCE AUDIO CERTIFICATE PROGRAM**

Complete the Nuance Audio Certificate Program to gain a comprehensive understanding of a groundbreaking product\* that combines vision and audio correction.

MANDATORY

# LEONARDO

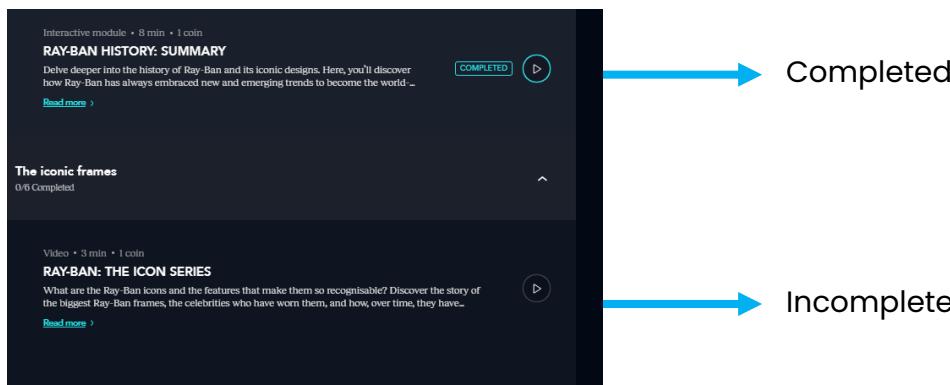
## Troubleshooting



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When a course does not show as completed, you can use the guidelines below to troubleshoot:

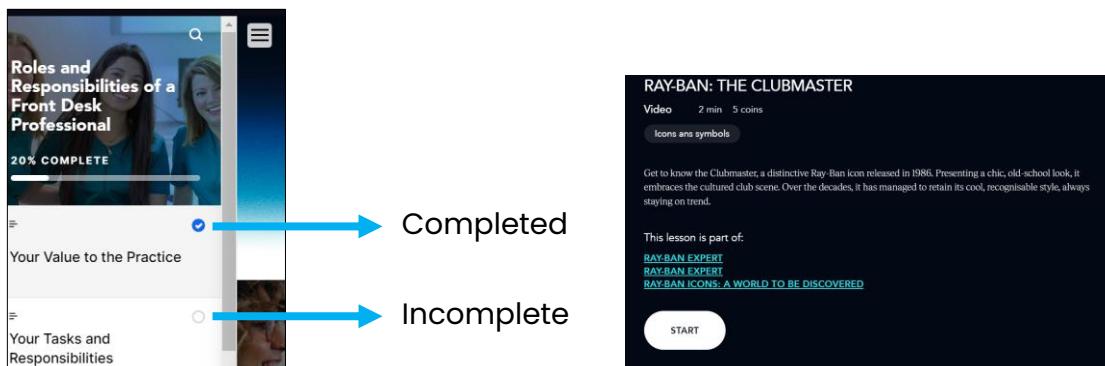
- If a course does not immediately show as completed, **do not** have your team member repeat the course
- It can take up to **24 hours** for the systems to reflect course completion
- Check the following:
  - Expand each section of the course to confirm completion of all lessons (i.e., Ray-Ban Experts course, all 18 lessons have been completed)



Completed

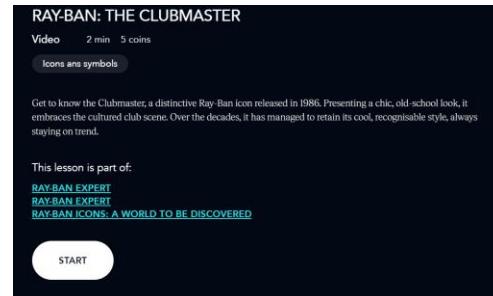
Incomplete

- Within each lesson, confirm all content has been completed (all pages/pop outs reviewed, and nothing listed after quiz)



Completed

Incomplete



Check for  
completion  
in all links

- If you need to step away, **Pause & Close** the course- **Relaunch** when ready to resume (if you leave the course open, behind the scenes it can close out and it will not record completion)

Utilize **HR Service Portal** (found within **My Personal Desk**) for Leonardo support and questions.

If a lesson has been completed and has not cleared from the team member to-do list, you will need to chat or email with HR Service Portal to resolve. Say "I have a lesson that I have completed but will not fall off my To-Do list in Leonardo." Do Not Say "The report is showing I have not completed my compliance lesson." Reminder to personally review the lesson to ensure they passed the quiz or knowledge check and clicked all the way to the end of the lesson before reaching out to HR Service Portal.

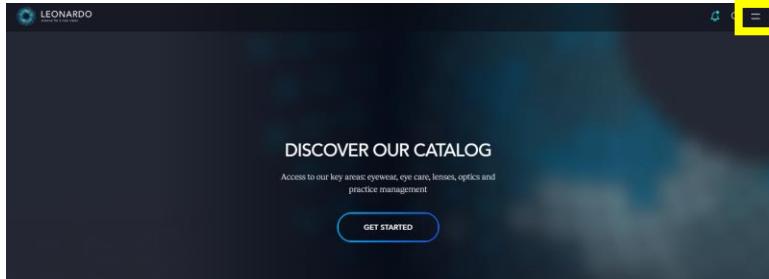


Onboarding reporting will be provided for you. 95% of all new hires are expected to complete their onboarding courses within 7 weeks (3.5 weeks for both Essentials & Advance.)

Practice Managers can check your team training progress and review completed lessons within Leonardo.

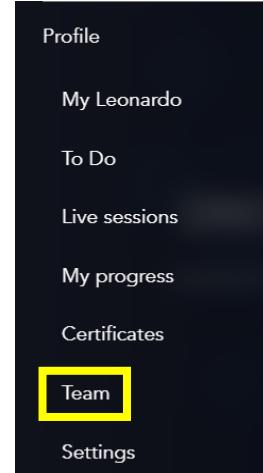
1

Log-in to Leonardo and click the 2 lines in the top right corner to access the menu:



2

Click Profile to expand the menu selections and click on Team:



3

Here you can see your team totals and pull a learning report on-demand:

**Report**  
Last update 27 Oct 2022 - 12:42  
Update now

Total time spent learning: 64h 24min (Vs. Last Month)  
Saturation: 88%  
coins earned: 922

Download XLSX   Download PDF

User ID	Surname	Name	Country	City	Address	Store	Completed lessons	Duration (min)	coins	Completed on	Format
773455	Morris	Yimma	US	Paramus	Suite 115	T001	EYE ANATOMY	10min	4	11 Aug 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	INTRODUCTION TO ASSET PROTECTION	15min	3	18 June 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	2022 MEDICARE/MEDICAID PWA	20min	4	19 June 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	2021-22 WORKPLACE HARASSMENT MANAGERS	10min	2	18 June 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	RECOGNIZING AND AVOIDING PHONE SCAMS	10min	2	17 June 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	2022 EMERGENCY RESPONSE	10min	2	17 June 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	DE-ESCALATING CONFLICT	10min	2	17 June 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	2022 HAZARDOUS WASTE	10min	2	15 May 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	2022 ELECTRICAL SAFETY: LOCKOUT/TAGOUT	8min	1	15 May 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	2022 HAZARD COMMUNICATION: LAB	10min	2	15 May 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	2022 ACCIDENT PREVENTION	15min	3	15 May 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	EMPLOYEE RELATIONS FOR MANAGERS OF PEOPLE	15min	2	15 May 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	THE 3 RS OF SHOPLIFTING PREVENTION	15min	3	08 May 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	2022 HAZARD COMMUNICATION: RETAIL	10min	2	08 May 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	2022 ELECTRICAL SAFETY: GENERAL	8min	1	08 May 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	2022 HAZARDOUS MATERIAL SHIPPING AWARENESS	8min	1	08 May 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	2022 ENVIRONMENTAL, HEALTH, AND SAFETY ACKNOWLEDGEMENT	20min	4	08 May 2022	Interactive lesson
773455	Morris	Yimma	US	Paramus	Suite 115	T001	2021-22 WORKPLACE HARASSMENT FOR EMPLOYEES	30min	6	08 May 2022	Interactive lesson

Note: TVOps will provide reporting on a monthly cadence for mandatory compliance lessons. Use this on-demand report to follow up between reporting cycles on your teams learning progress.

# SUPPLEMENTAL LEONARDO COURSES



CATEGORY	DURATION	LESSON TITLE – CLICK TO BE DIRECTED TO THE LESSON
<b>Eyezen®</b>	15 min	<a href="#">Eyezen + Lenses</a>
	10 min	<a href="#">Eyezen Kids, Designed How They See The World</a>
	10 min	<a href="#">Eyezen Start Lenses Relax &amp; Help Protect The Eyes</a>
	10 min	<a href="#">Eyezen Boost Lenses Support Eye Focus Efforts</a>
	10 min	<a href="#">Essilor Pro: Eyezen *</a>
<b>DST</b>	5 min	<a href="#">VSP: What are Digital Lenses *</a>
	10 min	<a href="#">20/20 Mag: Digital Lenses Basics- What You Need To Know *</a>
<b>Varilux® X series™</b>  <b>Varilux® Comfort Max</b>	2 min	<a href="#">Varilux X Series Concepts</a>
	3 min	<a href="#">Varilux X Series Highlights</a>
	10 min	<a href="#">Varilux Comfort Max</a>
	3 min	<a href="#">Varilux Comfort Max Highlights</a>
	10 min	<a href="#">Essilor Pro: Varilux *</a>
	1 hour	<a href="#">Ray-Ban Expert</a>
	10 min	<a href="#">Master Optimized Lenses with Oakley True Digital</a>
	1 hour	<a href="#">Oakley Expert</a>
	30 min	<a href="#">Welcome To Costa</a>
<b>Crizal.</b>	15 min	<a href="#">Crizal Sapphire HR Premium Anti Reflective Coating</a>
	10 min	<a href="#">Crizal Prevencia: Blue-Violet Light Protection</a>
	10 min	<a href="#">Crizal Rock Scratch and Smudge Resistant Coating</a>
	10 min	<a href="#">Essilor Pro: Crizal AR Coatings *</a>
<b>AR Basics</b>	10 min	<a href="#">How An Anti-Reflective Coating Works</a>
	8 min	<a href="#">Get Into The Substance Of Anti-Reflective Coatings</a>
	10 min	<a href="#">Exploring Lens Treatments</a>
	5 min	<a href="#">Lens Coatings</a>
	30 min	<a href="#">Transitions Expert</a>

Click [HERE](#) to log into Leonardo and click the lesson links to begin the course.

\* External site so you must open on Dell/OD Computer



Category	Duration	Lesson Title – Click to be directed to the lesson	Assorted in Location
 ARMANI EXCHANGE	15 min	<a href="#">ARMANI EXCHANGE SS 2024: THE HIGHLIGHTS</a>	
	2 min	<a href="#">ARMANI EXCHANGE AT A GLANCE</a>	
 BURBERRY LONDON ENGLAND	15 min	<a href="#">BURBERRY SS 2024: THE HIGHLIGHTS</a>	
	8 min	<a href="#">BURBERRY SS 2024: WOMEN'S RUNWAY</a>	
 COACH NEW YORK	15 min	<a href="#">COACH SS 2024: THE HIGHLIGHTS</a>	
	15 min	<a href="#">COACH: AN AMERICAN ICON</a>	
 COSTA SEE WHAT'S OUT THERE	15 min	<a href="#">COSTA SS 2024: THE HIGHLIGHTS</a>	
	15 min	<a href="#">COSTA KING TIDE CAMPAIGN</a>	
 DOLCE & GABBANA	15 min	<a href="#">DOLCE&amp;GABBANA SS 2024: THE HIGHLIGHTS</a>	
	15 min	<a href="#">DOLCE&amp;GABBANA SS 2024 CAMPAIGN</a>	
 EMPORIO ARMANI	15 min	<a href="#">EMPORIO ARMANI SS 2024: THE HIGHLIGHTS</a>	
	17 min	<a href="#">EMPORIO ARMANI: AT THE HEART OF SUSTAINABILITY</a>	
 FERRARI	15 min	<a href="#">FERRARI SS 2024: THE HIGHLIGHTS</a>	
	5 min	<a href="#">WHAT MAKES IT FERRARI</a>	
 GIORGIO ARMANI	13 min	<a href="#">BEGIN YOUR GIORGIO ARMANI JOURNEY</a>	
	15 min	<a href="#">GIORGIO ARMANI SS 2024: THE HIGHLIGHTS</a>	
 MICHAEL KORS	13 min	<a href="#">IN MICHAEL KORS' EYES</a>	
	5 min	<a href="#">MICHAEL KORS SS 2024 MEN'S CAMPAIGN</a>	
 OAKLEY	15 min	<a href="#">OAKLEY SS 2024: THE HIGHLIGHTS</a>	
	15 min	<a href="#">OAKLEY SS 2024: SPAERA CAMPAIGN</a>	
	3 min	<a href="#">OAKLEY SPAERA &amp; BISPAERA: IMMERSIVE DESIGNS</a>	
	14 Min	<a href="#">OAKLEY FRAME TECHNOLOGIES</a>	
 PERSOL	15 min	<a href="#">PERSOL SS 2024: THE HIGHLIGHTS</a>	
	min	<a href="#">PERSOL AT A GLANCE</a>	
 POLO RALPH LAUREN	15 min	<a href="#">POLO RALPH LAUREN SS 2024: THE HIGHLIGHTS</a>	
	15 min	<a href="#">POLO RALPH LAUREN SS 2024: THE PREP COLLECTION</a>	
 PRADA EYEWEAR	4 min	<a href="#">PRADA EYEWEAR: WHERE THE TRADITION MEETS INNOVATION</a>	
	15 min	<a href="#">PRADA SS 2024: THE HIGHLIGHTS</a>	



Category	Duration	Lesson Title – Click to be directed to the lesson	Assorted In Location
 <b>RALPH</b> RALPH LAUREN EYEWEAR	15 min	<a href="#">RALPH SS 2024: THE HIGHLIGHTS</a>	
	5 min	<a href="#">RALPH AT A GLANCE</a>	
	10 min	<a href="#">LENNY KRAVITZ X RAY-BAN REVERSE: ICON MEETS IDOL</a>	
	15 min	<a href="#">RAY-BAN CHANGE: FRAME COLOR TRANSFORMATION</a>	
	12 min	<a href="#">BEGIN YOUR RAY - BAN JOURNEY</a>	
	15 min	<a href="#">RAY_BAN SS 2024: THE HIGHLIGHTS</a>	
	30 min	<a href="#">SWAROVSKI: MEET THE BRAND</a>	
 <b>SWAROVSKI</b>	15 min	<a href="#">SWAROVSKI SS 2024: THE HIGHLIGHTS</a>	
	15 min	<a href="#">TIFFANY &amp; CO. SS 2024: THE HIGHLIGHTS</a>	
 <b>TIFFANY &amp; Co.</b>	10 min	<a href="#">TIFFANY &amp; CO.: FROM ORIGINS TO EYEWEAR</a>	
	15 min	<a href="#">TORY BURCH SS 2024: THE HIGHLIGHTS</a>	
 <b>TORY BURCH</b>	10 min	<a href="#">TORY BURCH SS 2024: WOMEN'S RUNWAY</a>	
	4 min	<a href="#">VERSACE: THE HISTORY</a>	
 <b>VERSACE</b>	15 min	<a href="#">VERSACE SS 2024: WOMEN'S RUNWAY</a>	
	15 min	<a href="#">VOGUE EYEWEAR SS 2024: THE HIGHLIGHTS</a>	
 <b>VOGUE eyewear</b>	4 min	<a href="#">VOGUE EYEWEAR AT A GLANCE</a>	

Category	Duration	Lesson Title – Click to be directed to the lesson
<b>Frame Materials</b>	15	<a href="#">Sustainable Materials For Eyewear</a>
	8	<a href="#">Titanium: The Story Of A Premium Material</a>
	4	<a href="#">Horn Frames: Tips And Tricks</a>

The following brands are part of the TeamVision Frame Assortment but do not currently have modules in Leonardo. Please check Leonardo for any updates by clicking [HERE](#).

**alain mikli**  
paris

**OLIVER PEOPLES**  
LOS ANGELES

**Sferoflex**

**Secon**

# DEVELOPMENTAL COURSES



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The following pages can be used for additional training and development (Note- this is just a sample of courses available. Search Leonardo for additional content.)

TVOps will email recommended courses and available Live Classrooms. You can self enroll in any Live classroom that interests you.

Click [HERE](#) to log into Leonardo or click the lesson links below to begin the course.

Category	Duration (min)	Lesson Title – Click to be directed to the lesson
Business Development	20	<a href="#">Understanding Practice Capture Rates</a>
	20	<a href="#">Practice Business Basics</a>
	5	<a href="#">The Importance of KPIs</a>
	20	<a href="#">Using KPIs To Manage Your Practice Business</a>
	20	<a href="#">Optimizing Your Practice Morning Routine</a>
	20	<a href="#">Budgeting Essentials</a>
	15	<a href="#">All About Payments: Methods And Handling Practices</a>
Contact Lenses	30	<a href="#">Optical Principles Of Contact Lenses</a>
	20	<a href="#">The World of Contact Lenses</a>
	10	<a href="#">Contact Lenses 3: Insertion and Removal</a>
	10	<a href="#">Multifocal Contact Lenses for Presbyopia</a>
Human Resources	15	<a href="#">5 Steps To Successful Recruiting And Hiring</a>
	5	<a href="#">Onboarding New Hires</a>
	20	<a href="#">Efficient Staffing And Scheduling</a>
	20	<a href="#">Handling Tough Conversations</a>
	30	<a href="#">Creating a Dynamic and Diverse Team Environment</a>
	20	<a href="#">Conflict Resolution</a>
	8	<a href="#">In-Store Hires and Onboarding Management</a>
Insurance	20	<a href="#">Managing Insurance</a>
	20	<a href="#">Optimizing Managed Vision Care</a>
Optical Knowledge	1 hour 40 min	<a href="#">Fundamentals of Optics</a>
	20	<a href="#">Understanding Prescription Information</a>
	15	<a href="#">Understanding Prism in a Prescription</a>
	20	<a href="#">Understanding Lens Power and Prismatic Effect</a>
	4	<a href="#">Introduction to the Eye Structure</a>
	15	<a href="#">Formulas And Mathematical Calculations</a>

# DEVELOPMENTAL COURSES



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Category	Duration (min)	Lesson Title – Click to be directed to the lesson
Optical Knowledge	15	<a href="#">The Boxing System And Key Measuring Principles</a>
	15	<a href="#">Tools And Adjustments</a>
	30	<a href="#">How To Use An Autolensometer</a>
	15	<a href="#">How To Use A Lensometer</a>
	15	<a href="#">Mastering Ocular Anatomy: Advanced</a>
	30	<a href="#">Ocular Diseases and Their Relationship to Anatomy</a>
	15	<a href="#">Dispensing to Children</a>
	10	<a href="#">Limitations of Optical Correction</a>
Patient Care	4	<a href="#">How To Make A Great First Connection</a>
	15	<a href="#">Lens Simulator A Guide For Sales Associates</a>
	22	<a href="#">Smart Shopper Usage Scenarios</a>
	1 hour 4 min	<a href="#">The Customer Experience in Your Practice</a>
	20	<a href="#">Introduction To The Eye Exam</a>
	3	<a href="#">The Three-way Handover To And From The Eye Exam</a>
	4	<a href="#">How To Ensure A Successful Patient Hand-off</a>
	4	<a href="#">How To Ask Your Patients The Right Questions</a>
	4	<a href="#">How To Serve Multiple Customers</a>
	4	<a href="#">How To Overcome Patient Objections</a>
	4	<a href="#">How To Select The Best Frames For Your Patients</a>
	4	<a href="#">How To Present A Complete Vision Solution For Your Patient's Needs</a>
	4	<a href="#">How To Lead Patients To Close The Deal</a>
	20	<a href="#">Managing Referrals in the Practice</a>
	20	<a href="#">Optimizing Patient Flow in the Practice</a>
People Development	20	<a href="#">Delegating Tasks In The Practice</a>
	20	<a href="#">Effective Communication Skills</a>
	1 hour 9 min	<a href="#">Coaching (Harvard Business Publishing)</a>
	25	<a href="#">Mentoring Employees</a>
	20	<a href="#">How To Make Decisions</a>
	20	<a href="#">Effective Time Management</a>

# DEVELOPMENTAL COURSES



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Category	Duration (min)	Lesson Title – Click to be directed to the lesson
RevolutionEHR*	36	<a href="#">Revolution EHR Tutorial</a>  <i>*Your site will be set up with a google classroom for educational videos and use the Practice &amp; Training in Rev</i>
Technicians	3	<a href="#">Understanding Typical Patient Symptoms</a>
	10	<a href="#">Introduction to Ocular Anatomy</a>
	4	<a href="#">Introduction to the Eye Structure</a>
	10	<a href="#">Eye Exams and Common Eye Diseases</a>
	15	<a href="#">Mastering Ocular Anatomy: Advanced</a>
	40	<a href="#">Ophthalmic Glossary</a> (PDF)
	20	<a href="#">Building Long Term Patient Relationships</a>
	15	<a href="#">What is Topography?</a>
	20	<a href="#">Understanding Prescription Information</a>
	30	<a href="#">Team Strategies for Myopia Management</a>
	1 hr	<a href="#">Refractive Errors and Ocular Diseases</a>
	1 hr	<a href="#">Triage and Patient Referrals-ABQ</a>
	1 hr 30 min	<a href="#">How to use the WAM 800</a>
	30	<a href="#">How To Use An Autolensometer</a>

*\*Onboarding paths and courses coming mid/end of 2025*

*Search Leonardo for additional topics!*

# CERTIFICATIONS & CONTINUING EDUCATION

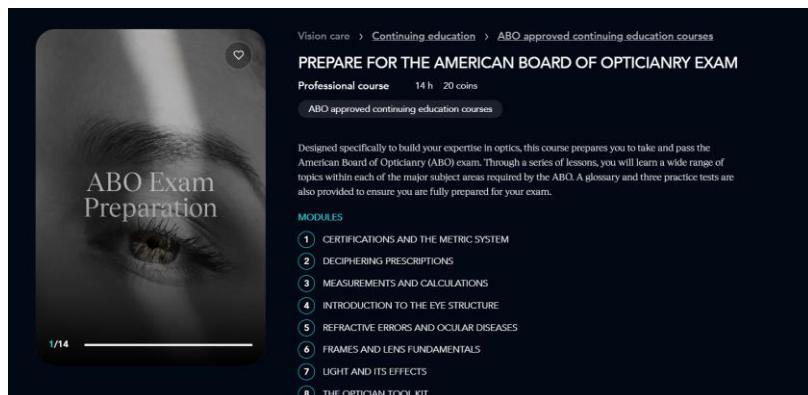


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## Interested in becoming an Optician?

Leonardo can help you learn everything you need to know in order to pass the American Board of Opticianry (ABO) Examination.

Each state will have its own requirements for you to become a Licensed Optician, so check with your HRBP to see what is required in your state.



[Click Here](#) to begin Prepare for the American Board of Opticianry Exam (14 hours)

[Click Here](#) to begin the ABO Exam Preparation- Extended Program (8 weeks in total)

[Click Here](#) to access Training For Optical Professional Study Guide

## Already Certified?

You can complete continuing education credits for both The American Board of Opticianry (ABO) & The National Contact Lens Examiners (NCLE) certifications through Leonardo.

Once you have completed the module, you will need to download the certificate and self submit to [ABO-NCLE.ORG](http://ABO-NCLE.ORG) for credit.

## Coming Soon:

CPOA and CPOT are both levels of certification offered by the American Optometric Association's Commission on Paraoptometric Certification (CPC):

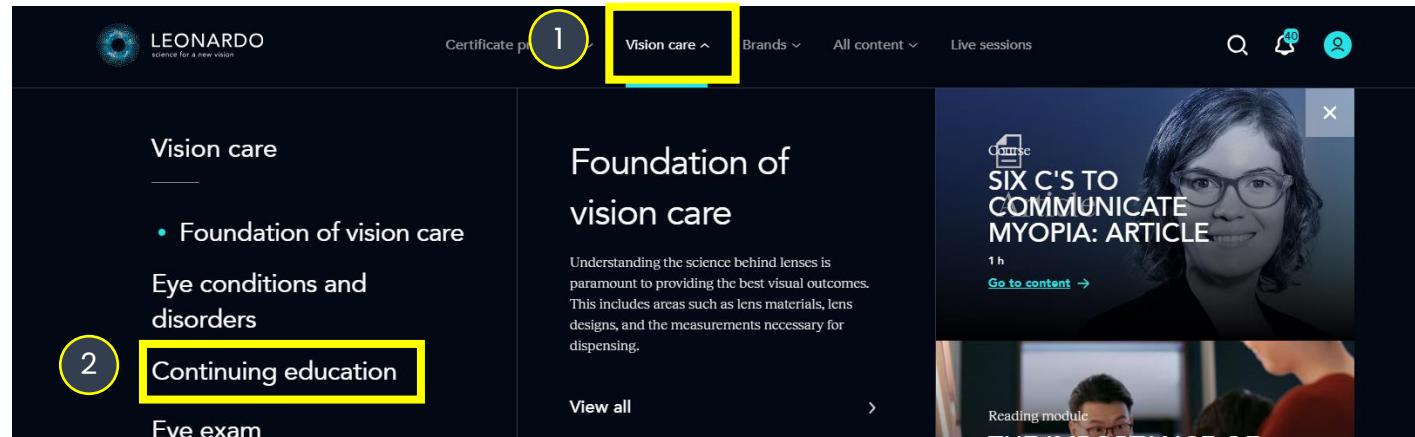
### Certified Paraoptometric Assistant (CPOA)

- An intermediate level certification that demonstrates the ability to apply optometric care concepts

### Certified Paraoptometric Technician (CPOT)

- An advanced level certification that demonstrates the ability to understand, apply, and relate optometric care concepts

Continuing Education Credits will soon be available in Leonardo! Coms will be sent out when it is available.



You can search for Courses and Live Classrooms by selecting Vision Care > Continuing Education from the Home page in Leonardo. Note- for all Live Classrooms you must be in attendance to receive credit (you cannot watch the course at a later date. )

# HARVARD BUSINESS PUBLISHING CERTIFICATIONS



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Curated content is available in many different topics such as Leadership, Business Development, Self Development, and more!

The screenshot shows the Leonardo platform interface. At the top, there is a navigation bar with the Leonardo logo, a search bar, and icons for notifications and user profile. The 'All content' button is highlighted with a yellow box and a circled '1'. The main content area is titled 'Competency Hub'. On the left, there is a sidebar with categories: 'All content', 'Product categories', 'Hearing', 'Business development', 'Operations', and 'Competency Hub'. The 'Competency Hub' item is highlighted with a yellow box and a circled '2'. Below it, there is a list of sub-categories: 'Self-Leadership', 'Team Leadership', 'Organizational Leadership', 'Diversity Equity Inclusion', 'Team management', 'Self-efficacy', 'Harvard Business Publishing', and 'People Transformation'. The 'Harvard Business Publishing' item is highlighted with a yellow box and a circled '3'. To the right, there are two course cards: 'GLOBAL COLLABORATION' and 'INNOVATION AND CREATIVITY', both from Harvard Business Publishing Corporate Learning.

# TOOLS & RESOURCES

# SYSTEMS TROUBLESHOOTING



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System	Troubleshooting tips
Eclips:	<ol style="list-style-type: none"> <li>1. Manual set up through SSS <ul style="list-style-type: none"> <li>• PM or Field Leader kicks off access by providing SSS employee details (see next slide)</li> </ul> </li> <li>2. Work through SSS for any systems related access <ul style="list-style-type: none"> <li>• Clear cookies &amp; Cashe</li> <li>• If system access not granted in 72 hours notify your field leader (Field can notify TVOps)</li> </ul> </li> </ol>
Other E.H.R Systems	<ol style="list-style-type: none"> <li>1. Managed at site level <ul style="list-style-type: none"> <li>• Anyone with Admin rights can add a new user</li> </ul> </li> <li>2. Compulink only: email form to Compulink for Cloud access.</li> </ol>
Ciao Systems	<ol style="list-style-type: none"> <li>1. Reset password through toolkit <b>Password Reset App</b> with: <ul style="list-style-type: none"> <li>• EL ID &amp; Password: LuxMMDDYYYY!</li> </ul> </li> <li>2. Confirm access by successful log into My Personal Desk, Leonardo, and Order Tracker</li> </ol>
Ciao! Optical Point of Sale	<ol style="list-style-type: none"> <li>1. If password re-set did not allow for access, log in with: <ul style="list-style-type: none"> <li>• EL ID &amp; Password: 1234</li> <li>• Can sync password in Ciao! back office</li> </ul> </li> </ol>
Email	<ol style="list-style-type: none"> <li>1. If you can access your individual email account, follow the direction in the Toolkit to add additional mailboxes <ul style="list-style-type: none"> <li>• Documents &gt; Email &amp; Communication &gt;Outlook &amp; Teams &gt; TeamVision Email Team Member Access PDF</li> </ul> </li> <li>2. If you are newly promoted to a PM, APM, or LM role, request access via TVOps@teamvisionteam.com</li> </ol>
Inventory Management	<ol style="list-style-type: none"> <li>1. Can take up to 2 pay periods to receive access <ul style="list-style-type: none"> <li>• Access is based upon HR title (PM, APM, TL, LM will have additional functionality)</li> </ul> </li> <li>2. Call SSS for systems related access</li> </ol>
Store Maintenance Portal	<ol style="list-style-type: none"> <li>1. Can take up to 2 pay periods to receive access <ul style="list-style-type: none"> <li>• This includes new hires &amp; promotions</li> <li>• Partner with your field leader for immediate needs</li> </ul> </li> <li>2. Call SSS for systems related access</li> </ol>
<b>Additional Notes:</b>	
<ul style="list-style-type: none"> <li>• Confirm team member is attempting the correct EL ID &amp; Password</li> <li>• Confirm it's not a location log in (vs. individual- example: Staples)</li> <li>• Call SSS for systems issues- if not resolved in 48 hours reach out to your field leader</li> <li>• Contractor ID's renew every 60 days which may require a password reset</li> <li>• Partner with your field leader for legacy systems access (i.e., Acuitas, Compulink, etc.)</li> </ul>	



## Overview

The **Documents** section of the **Toolkit** houses information that can be utilized during Conversion & New Hire Onboarding as well as when Development & Cross-Training occurs. Below lists some of the frequently used Documents found in the Toolkit.

Topic / Folder	Resource
Ciao! Point of Sale System	<ul style="list-style-type: none"> <li>Patient Journey Videos</li> <li>Training &amp; Ordering Guides</li> </ul> <ul style="list-style-type: none"> <li>Sales Audit Guides (Payment, Return &amp; Exchange)</li> <li>Opening &amp; Closing Guides</li> </ul>
Consultative Selling	<ul style="list-style-type: none"> <li>Training Deck</li> <li>Tools &amp; Resources Guides</li> <li>Missed or No Transition Review &amp; Evaluation</li> </ul>
Contact Lenses	<ul style="list-style-type: none"> <li>Quick Order Guide</li> <li>NOVG Portal Guide</li> <li>Fax Back Form</li> </ul> <ul style="list-style-type: none"> <li>CL Parameters</li> <li>Medically Necessary Guides</li> <li>Natural Vue Overview</li> </ul>
ECLiPS	<ul style="list-style-type: none"> <li>New Hire Set Up</li> <li>Eclips Guide</li> <li>Tab Guides</li> </ul>
Environmental, Health, & Safety	<ul style="list-style-type: none"> <li>Conversion Audit Guide</li> <li>EHS Manual</li> <li>Monthly Audit &amp; Checklist</li> </ul> <ul style="list-style-type: none"> <li>EHS Manual</li> <li>Chemicals &amp; SDS</li> </ul>
Eye-Ruler 2	<ul style="list-style-type: none"> <li>ER2 Guidelines &amp; Troubleshooting</li> <li>Practice Scenarios &amp; Observation tool</li> <li>Huddle</li> </ul>
Eyewear Inspection Process (Lab > Lab Training > EIP)	<ul style="list-style-type: none"> <li>Eyewear Inspection Process</li> <li>EIP Knowledge checks</li> <li>Inspection aids</li> </ul>
Eyewear Protection Plan (EPP)	<ul style="list-style-type: none"> <li>EPP Guide</li> <li>Sales Aids</li> <li>Policy &amp; Procedure</li> </ul>
Insurance Billing	<ul style="list-style-type: none"> <li>Selecting Auto-Calc Plans</li> <li>Transaction Express Guide</li> <li>VSP Enhancement Charts</li> </ul> <ul style="list-style-type: none"> <li>Practice Guides</li> <li>Medical Billing Overview</li> <li>VSP Training Videos</li> </ul>
Inventory Management	<b>Inventory Management Guide:</b> <ul style="list-style-type: none"> <li>Frame Recovery</li> <li>Shipment Confirmation</li> </ul> <ul style="list-style-type: none"> <li>Central Purchasing</li> <li>Inventory Adjustments</li> <li>UPC Search</li> </ul>
Kronos	<b>Kronos Time Keeping Guide:</b> <ul style="list-style-type: none"> <li>Punch In/Out</li> <li>Time Off Requests</li> </ul> <ul style="list-style-type: none"> <li>Kronos Scheduler</li> </ul>
Lens Simulator & Lens Product Knowledge	<ul style="list-style-type: none"> <li>Lens Simulator Guide</li> <li>Lens Education Links to Leonardo</li> <li>Lens Sim Scenarios &amp; Observations</li> </ul> <ul style="list-style-type: none"> <li>Huddle Template</li> </ul>
Order Management (Lab Processing)	<b>Order Management Guide:</b> <ul style="list-style-type: none"> <li>Change Lab</li> <li>Order Transmission</li> </ul> <ul style="list-style-type: none"> <li>Shipping to RxO</li> <li>RxO Escalations</li> <li>All things order related</li> </ul>
Right The First Time (RTFT)	<ul style="list-style-type: none"> <li>RTFT Program &amp; Tools</li> <li>Remake Prevention &amp; Coaching</li> </ul>

# TRAINING TRACKER



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## Name

# Topic

A blank 10x10 grid of squares, suitable for various applications such as a game board or a data table.

## NOTES



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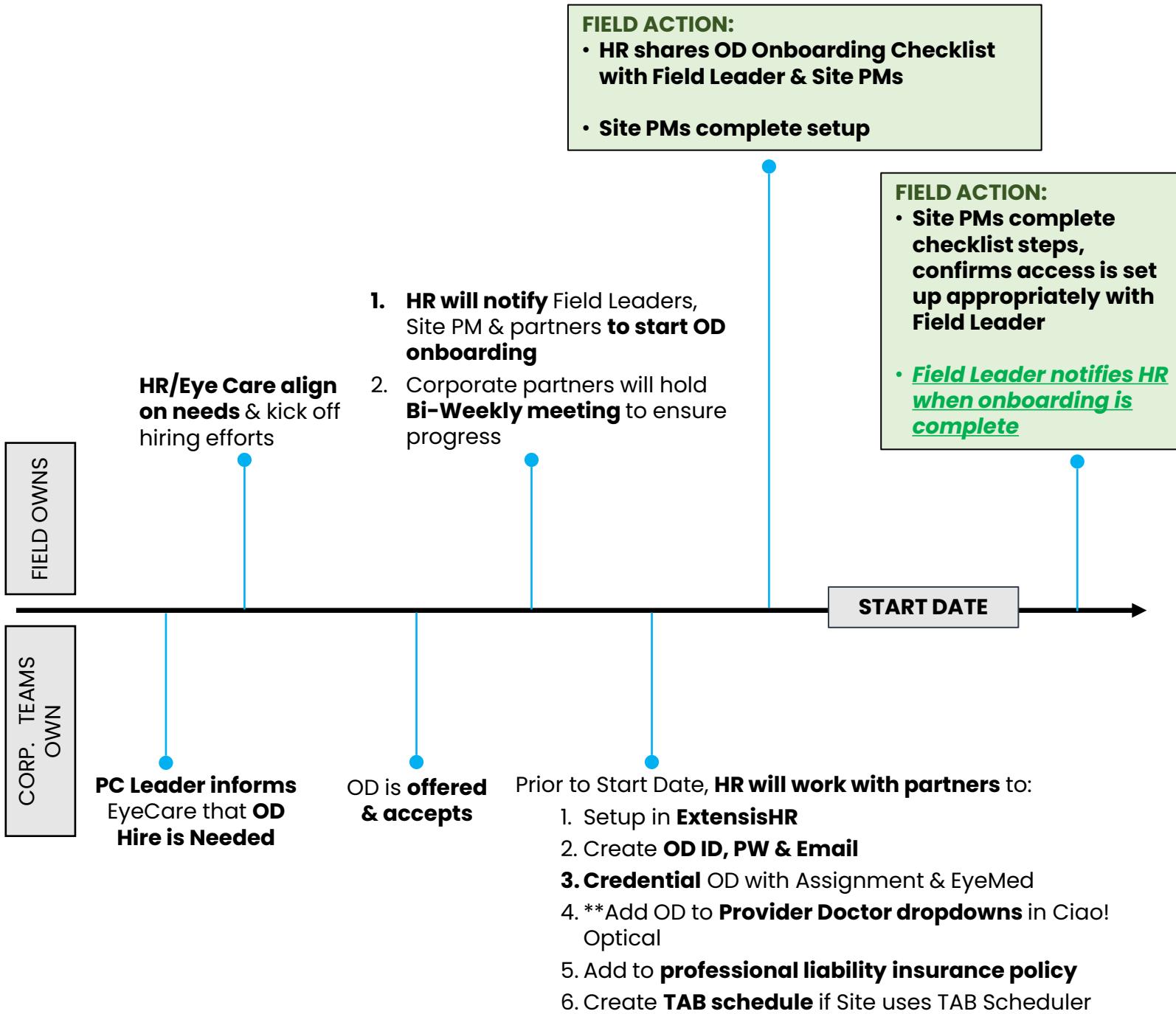
# OD ONBOARDING

# NEW HIRE ODs

## Field Action



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\*\*Providers will not appear in Ciao! Optical EyeMed Provider Drop Down until OD credentialing is complete; Site PM to guide staff to bill under "incumbent OD" until credentialing is complete.

## OD Onboarding Checklists:

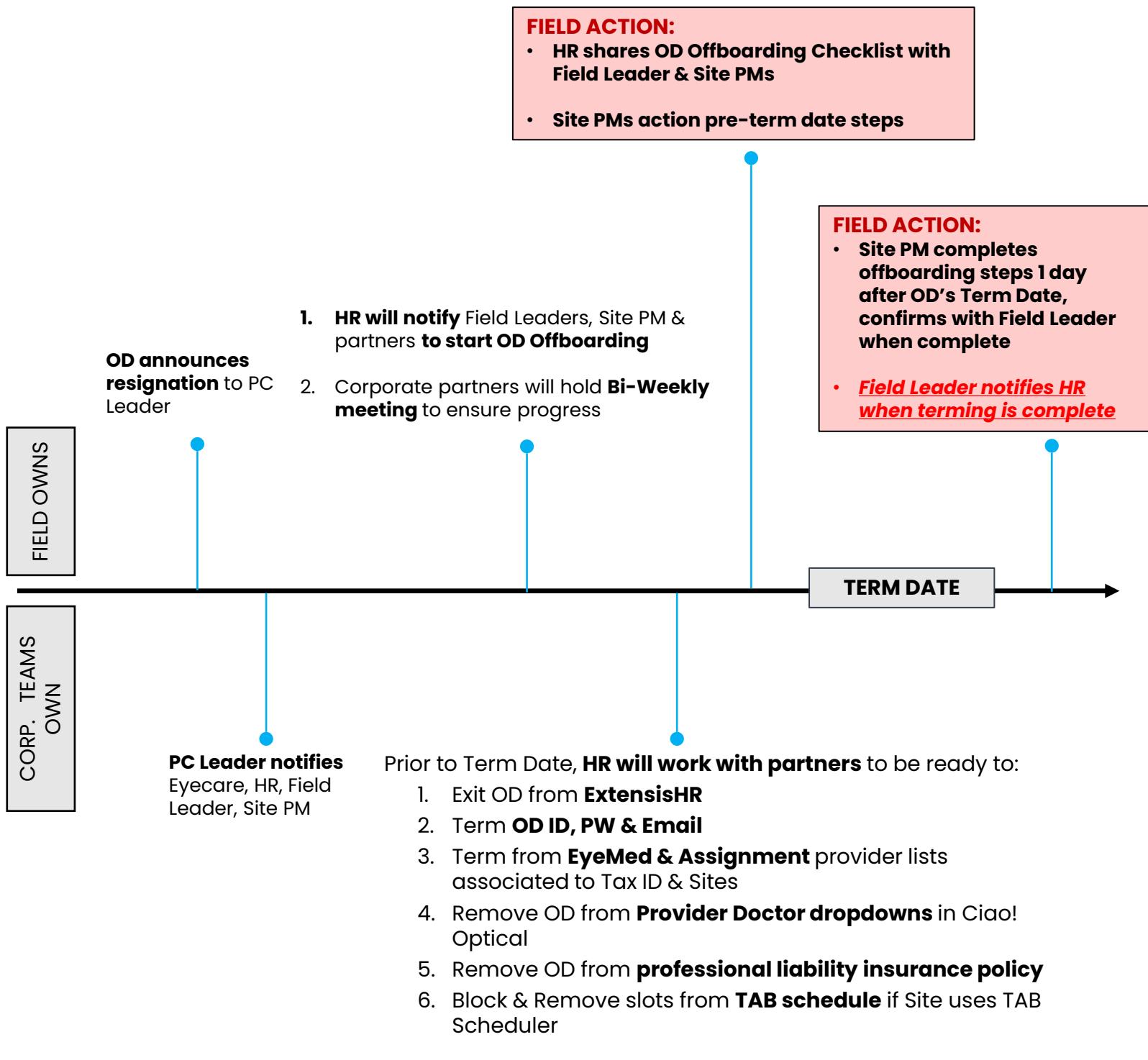
- The OD checklists are a living document
  - There are two versions of the checklist, and you will be sent the one applicable to you
    - TeamVision MSO & Rosin: Employed OD's
  - Your HRBP will provide the most current version of the Checklist
  - Once completed, please return to your HRBP

# OFFBOARDING ODs

## Field Action



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### OD Offboarding Checklists:

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  - TeamVision MSO & Rosin: Employed OD's
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# INTEGRATION WEEK TRAINING CHECKLISTS

# LEARNER GUIDE & TRAINING CHECKLISTS



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A Learner Guide and Training Checklist is available by system/employee role within the practice. These are intended to be used to identify what you know and what you still need to practice/learn.

You can use these with new hires or when simply learning new skill sets. As a team, you could pick a focus for the week/month and ensure that everyone has a solid understanding of the systems and processes post integration.

[CLICK HERE](#) to access the most current version of the Integration Guide/ Training Checklists.



**For additional questions reach out to your HR  
Business partner, Field Leader, or TVOps.**