

Unknown Doctor Reporting

UNKNOWN OD

WHY DO WE SEE UNKNOWN ODS IN REPORTING?

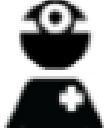
- No Doctor was selected for FRAME ONLY (including PLANO SUN) Ciao! Optical Orders
- No Doctor was selected for ACCESSORIES & WELLNESS Ciao! Optical Orders
- Using Neutralization for Rx OD
- Selecting External OD for an exam service

OUR SOLUTION

- For true unknowns meaning this is an outside patient with no connection to an OD in your practice, select NO DOCTOR. We've added a doctor called NO DOCTOR to your INTERNAL and EXTERNAL local doctor list for you.
 - Always select INTERNAL or EXTERNAL
 - Type in DOC (or any 3 consecutive letters)
 - NO DOCTOR will appear in the dropdown – select it
- This will ensure that we no longer have UNKNOWN ODs in the reporting. Remember – select the correct OD every time. If truly an external patient not associated with the clinic, select No Doctor – this should be very rare..


**FOR FRAME ONLY, PLANO SUN, ACCESSORIES & WELLNESS.
SELECT THE CORRECT DOCTOR. IF TRULY UNKNOWN, SELECT
NO DOCTOR FROM THE LIST.**

Source



DOCTOR, NO

Source



DOCTOR, NO

WHY IS THIS IMPORTANT

Selecting the right doctor's name ensures that the correct doctor's personal productivity is captured and accurate.

FRAME ONLY & PLANO SUN

- Select the correct OD. Ciao! Optical doesn't require an OD for this order type so you need to select Internal or External Rx as the Source and then search/select No Doctor.
 - No Doctor represents a truly unknown doctor.

Fake Patient

Frame Order Worksheet Order Completion

Item # Brand Style #

Unknown Frame

Source External Rx

doc
DOCTOR, NO

PR 01OS, Blk, Gry Grd \$279.00
PR 01OS, Brn Pnk, Brn Grd \$279.00
PR 01OS, Trt Brn, Brn G P \$329.00
PR 01OSA 55 CONCEPTUAL, Blk Shn, Gry Gr \$279.00
PR 01OSA 55 CONCEPTUAL, Trt, Grn Grd \$279.00

Showing 1 to 5 of 2,017 entries Previous 1 2 3 4 5 ... 404 Next

Item #: 679420888507 Style: PR 01OS, Trt Brn, Brn G P
Color: Trt Brn Retail Price: \$329.00

Frame in store
Frame not in store
Frame in store, Special Order

Ciao! Optical Customer Order
Location 29001 457569 (Logout)

ACCESSORIES & WELLNESS

- Accessories and Wellness should be entered into Ciao! Optical/Customer Order – with the Ciao! Optical patient profile.
 - This includes Co Management Fees, etc.
- Select the correct OD. Ciao! Optical doesn't require an OD for this order type so you need to select Internal or External Rx as the Source and then search/select No Doctor.
 - No Doctor represents a truly unknown doctor.

ALWAYS SELL ACCESSORIES & WELLNESS IN CUSTOMER ORDER WITH PATIENT PROFILE. ADDING AS A QUICK SALE DIRECTLY IN XSTORE (Tendering Application) EVEN AS AN ADD ON TO A PATIENT ORDER (exam, etc.) WILL RESULT IN AN UNKNOWN OD. ALWAYS ENTER WITH THE PROFILE AND SELECT THE CORRECT DOCTOR.

The screenshot displays the 'Fake Patient' interface in the Ciao! Optical system. The 'Other' tab is selected, indicated by a red arrow. Below the tab, there are input fields for 'Item #' and 'Style #', and a search icon. The 'Source' dropdown menu is open, showing 'Internal Rx' as the selected option. A red box highlights the 'No Doctor' option, which is represented by a person icon and the text 'dod DOCTOR, NO'. Below the dropdown, there is a table with columns 'Item #', 'Description', and 'Price'. The table is currently empty, showing 'Showing 0 to 0 of 0 entries'. At the bottom of the interface, there is a 'Customer Order' button and a 'Logout' link.

EXAMS SHOULD ALWAYS BE INTERNAL Rx OD

- When placing an **Exam** sale in Ciao! Optical, Customer Order – ALWAYS SELECT **INTERNAL RX** (as the source).
 - You will be required to select the correct doctor in the Doctor Name field
 - Note that External Rx is an option in the Source dropdown. This option is never applicable for us. If a patient is getting an exam in our clinic, they must be seeing a doctor.



The screenshot shows the 'Doctor Services' form with the following fields and values:

- Patient Status:** ☐ New ☒ Established
- Source:** Internal Rx (dropdown menu)
- Doctor Name:** (empty text field)
- Eye Exam:** 92014 INTERMEDIATE EST PT (dropdown menu)
- Contact Lens Eval:** 92310 CI Evaluation Std (dropdown menu)
- ☐ No High Risk Diagnosis



The screenshot shows the 'Doctor Services' form with the following fields and values:

- Patient Status:** ☐ New ☒ Established
- Source:** External Rx (dropdown menu)
- Doctor Name:** (empty text field)
- Eye Exam:** 92014 INTERMEDIATE EST PT (dropdown menu)
- Contact Lens Eval:** 92310 CI Evaluation Std (dropdown menu)
- ☐ No High Risk Diagnosis

NEUTRALIZATION

- Selecting Neutralization will result in an Unknown OD.
- For rare instances involving neutralization, see chart below on how to enter in Ciao! Optical.



	Prescription Type:	Bifocal/Progressive				
	Doctor:					
	Date Written:	7/6/2022				
	Expiration Date:	7/6/2023				

	SPH	CYL	AXIS
OD(R)	+0.00		
OS(L)	+0.00	-0.50	180
ADD(R)	+2.50		
ADD(L)	+2.50		

Rx Date	Rx Type	0.01D	Source	Dr Name
7/6/2022	BF/Prog		Neutralization	

Best practice is to confirm with OD on Rx extensions. We encourage annual eye exams and neutralization should be uncommon and exception based. Note that the ability to neutralize does vary by state and REQUIRES state licensed opticians to read eyewear.

Clinic Patient	<ul style="list-style-type: none">• Look up past Rx and OD.• Enter in as Internal and select correct doctor.• If that doctor is no longer employed/working at the practice, select No Doctor.• Make Rx Date & Expiration Date the same and = to the date you neutralized (dates will match and represent a 1-day Rx valid timeframe).• Note in Rx Notes that this Rx was Neutralized.
Not Clinic Patient (External)	<ul style="list-style-type: none">• Enter in as External and select No Doctor.• Make Rx Date & Expiration Date the same and = to the date you neutralized (dates will match and represent a 1-day Rx valid timeframe).• Note in Rx Notes that this Rx was Neutralized.

DAILY REPORTING

- Following these steps will ensure there are no UNKNOWN doctors in reporting.
- No Doctor will represent Unknown.
- We are sending a DAILY report to your clinic's shared email account with any unknowns processed (Fiscal Month to Date). YOU SHOULD NEVER SEE ORDERS ON THE LIST WITH UNKNOWN DOCTOR.
 - If you do, you will need to correct (return/re-renter) the order and ensure the right doctor selection (either the correct doctor or No Doctor). This will not appear on the next day's report. Work with the team member to avoid future instances.
 - If you don't have anything on the list – GREAT! No action required.

WE NEED EVERYONE SUPPORT AND ATTENTION TO THIS MATTER. WE ARE SENDING FILES TO LEAD DOCTORS EVERY FRIDAY (WEEKLY) FOR VISIBILITY. AT THE END OF THE FISCAL MONTH, THERE WILL BE NO OPPORTUNITY TO ADJUST.