



# 2018 EDUCATION REVIEW REQUIREMENTS

*A Guide to Submitting Education for CPC Approval for  
Continuing Education Credit for Paraoptometric*



*Maintenance of a paraoptometric certification requires participation in approved continuing education, which assists the professional in remaining current in his or her field and aware of recent developments in research, theory, and practice.*

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## Background

These requirements for the review of continuing education credit are intended to help guide organizations planning paraoptometric education. The matter of professional competence of paraoptometricians must be ensured so the public welfare and other stakeholders can rely on the systems of certification programs to identify individuals who have the qualifications and competence to provide services.

In regard to certification, there has been much discussion and documented research concerning continued competence. The CPO, CPOA, CPOT credentials of the Commission on Paraoptometric Certification (CPC™) are accredited by the National Commission for Certifying Agencies (NCCA). The NCCA accreditation serves as a benchmark on how organizations should conduct certification and clearly distinguishes the excellence and value of CPC™ certification. In order to receive and maintain this national accreditation, a program must meet and adhere to twenty-four standards. One of these standards pertains to the review of continuing education and the recertification mechanism as follows:

Standard 22: The certification program must require periodic recertification.

*Essential Elements:*

- A. The certification program must have a statement of purpose for the recertification requirements that is consistent with the Commission's definition of recertification.
- B. The certification program must have a definition of continued competence that is consistent with the Commission's definition of recertification.
- C. Certification must be time limited with a specified beginning and end date to the period of certification. The recertification period selected must be supported by a rationale that reflects how the relevant knowledge and skills for the certificants and for the field may change over time.
- D. Programs applying for accreditation must require periodic recertification for all certificants.
- E. The certification program must have a mechanism to verify that certificants have met the recertification requirements.
- F. The certification program must make all recertification policies and procedures (including statements of purpose, definitions, and rationales) publicly available.

**Commentary:**

1. The Commission defines recertification as "requirements and procedures established as part of a certification program that certificants must meet to maintain competence and renew their certification."
2. The recertification requirements can either measure and/or promote continued competence.
3. The Commission defines continuing competence as "demonstrating specified levels of knowledge, skills, or ability not only at the time of initial certification but throughout an individual's professional career."
4. The public may interpret continuing competence to mean that the services provided by certificants will always be delivered at the highest-quality level regardless of practical limitations for what

certification and recertification can realistically achieve. The certification program should provide an explanation of the limitations of a certification program's definition of continuing competence relative to the public's likely understanding of continuing competence.

5. Continuing competence may be defined differently than initial competence to account for role differentiation over time. For example, the range of services provided by a certificant may narrow over time due to concentration in a specialized area of service, and the certificant's range of competence may narrow.

6. Lifetime certification is not consistent with the requirement for periodic recertification.

7. The rationale for the recertification period should be based upon an estimation of the shelf life of the knowledge and/or skills fundamental to the certification as affected by knowledge degradation over time (e.g., forgetting) and the effects of technological change (e.g., obsolescence). Evidence regarding how quickly the required knowledge base changes (e.g. job analysis data) is an example of appropriate supporting evidence. Selection of a time-period based solely upon convenience or historical precedent (i.e., "it has always been this way") is not an evidence-based rationale.

8. If a certification program issues a limited-duration certification with a specified termination date and with no option for an individual continuing to claim the certification beyond that date, recertification does not apply.

9. Recertification requirements may differ for more recent certificants as compared to certificants from earlier years, but all certificants must be held to some form of recertification requirements that support the goal of maintaining competence. Different requirements may be the result of the need to balance the desire to advance requirements for the future of the profession with the need to maintain the contract made with earlier certificants.

10. If any certificants are exempted from current recertification requirements, the certification program should provide a rationale to explain how the current knowledge and/or skills of those individuals will be maintained. The period during which such recertification exemptions were granted must have been terminated before the certification program applies for accreditation.

11. If a certification program allows certificants to select from among multiple recertification options, then the certification program should document how each option links to the common goal of maintaining competence.

12. If continuing education (CE) is the recertification requirement, then the certification program should address the typical limitations of CE (e.g., self-selected CE, focus on convenience and cost over need, points-oriented rather than learning-oriented, commercial or sponsorship bias) and document how it evaluates whether the CE activities support continuing competence (e.g., quality and relevance of content, effectiveness of delivery method).

13. If an examination is the recertification requirement, then the certification program should document that the examination meets the psychometric quality criteria of the *NCCA Standards*, including reliability and validity evidence, and how the examination supports continuing competence.

14. If self-assessment is the recertification requirement, then the certification program should describe how it addresses the typical limitations of self-assessment (e.g., lack of objectivity) and how it translates the results of the self-assessment to a verifiable professional development plan.

15. If third-party assessment is the recertification requirement, then the certification program should document that the assessment mechanism serves its intended purpose and how the assessment supports continuing competence.

16. If portfolio review is the recertification requirement, then the certification program should document the criteria for portfolio development and evaluation as well as the linkage to continuing competence.

17. If certificants self-attest to compliance with the recertification requirements, then an audit process that selects a sample of all certificants and verifies their documentation of compliance is an example of an acceptable recertification mechanism.

18. If the certification program uses a sampling audit model, the program should provide the rationale for the percentage of certificants audited as well as a description of the audit process itself.

19. Forms of evidence supporting compliance could include the following:

- a. Policies that specify that all certificants are required to comply with recertification requirements.
- b. Policies and procedures that specify the consequences for certificants who do not meet recertification requirements within the specified period.
- c. Policies and procedures explaining the process for regaining certification discontinued for noncompliance with recertification requirements.

## Guidelines for CPC™ Approved Education Credit

### Purpose

The Commission on Paraoptometric Certification (CPC™) believes that individuals certified as CPO, CPOA, CPOT, or CPOC should continue to expand their skills to enhance the quality of services and patient care they provide. The CPC™ requirements for certification renewal are designed to encourage and motivate certified paraoptometric to continue their professional education through continuing education.

To achieve a high level of quality continuing education, the CPC™ has a pre-approval process for continuing education programs. Organizations that provide continuing education and training are encouraged to seek pre-approval of their programs which will indicate that their programs are appropriate to use toward meeting recertification requirements.

CPC™ approval of education courses is designed to insure that:

- courses are pertinent to the profession of optometric assisting, optometric technology or optometric coding/billing
- courses are presented by qualified and knowledgeable speakers
- courses meet standards that are expected by the optometric profession
- quality continuing education opportunities are available for certified paraoptometric

Education programs of varying media and presentations may apply for CPC™ continuing education approval for paraoptometric. These may include, but are not limited to:

- classroom presentation (lecture, panel, workshop, Q&A)
- distance learning (electronic or print media)
- employer in-service training (training only to their employees, and at no charge)
- industry provided training
- self-study programs

### General Requirements

When seeking course approval, the program provider must submit the following items:

- A ***detailed and timed outline*** (or an outline that meets the page-length requirements on page 6) of the presentation that includes, learning objectives, specific skills to be learned, **and**
- presenter's current ***curriculum vitae or resume***' (bios are not accepted)

### Format

A program may be comprised of many courses (various topics) or just one course (one topic). Programs may be presented in many different types of formats; i.e., classroom presentation (lectures, workshops, seminars, etc.), distance learning (electronic or print media), or employer in-service training (in-service training provided by employers to their employees only and at no charge).

### Classification of Levels

The provider must define the program applied for as basic, intermediate, or advanced level. At the *basic* level, the attendee is expected to have had very little or no background in the subject matter area. An

*intermediate* level program is for individuals who have had some experience in the subject area. An *advanced* level program is for those attendees who have had two or more years of experience in the subject matter and have satisfied any prerequisites as determined by the education provider. Providers offering advanced level courses must include with the application any prerequisite experience or knowledge requirement.

It is the provider's responsibility to advise the program sponsor of any prerequisite information that should be included with promotional and registration materials. In cases where promotional or registration information is printed prior to receiving course approval, the following statement should be included:

***This course is pending approval from the AOA Commission on Paraoptometric Certification (CPC™) for continuing education credit for use toward paraoptometric certification renewal.***

Do not indicate or market courses as "CPC-approved" until approval has been granted. Once course approval has been granted, be sure to include the learning level of the course in any marketing or printed materials along with any prerequisite requirements.

## **Outline Requirements**

Outlines must be detailed and timed or must meet the page requirements listed below. All outlines must contain the following:

- course description
- learning objectives
- specific skills that are to be learned
- course length in minutes
- main topics and sub-topics

### **Page-length requirements:**

- Margins – not to exceed 1 inch on any side
- Font size – not larger than 11
- Line Spacing – single-spaced
- 1.5 pages for every 50 minutes/1 CE credit for the first page; an additional page for additional credit requested

### **Vendor/Brand Specific Presentations**

Sometimes it is appropriate for a vendor or manufacturer to present in-office or other trainings specific to their products or equipment. However, the presenter must inform the audience of their affiliation with the organization/vendor. Course descriptions and any promotional materials must clearly indicate that the presentation will be brand-specific to a certain product or piece of equipment. (These types of trainings may be deemed by the review committee as not appropriate for groups in a larger setting.)

## **Speaker Qualifications**

A resume' or curriculum vitae of no more than 5-6 pages in length must be included with the application. **Do not include your full birthdate or social security number.**

- Program biographies are not accepted in lieu of a resume' or CV.

- A speaker should have appropriate qualifications judged by a combination of education and training, work experience, peer recognition, related speaking experience, publications, and professional credentials such as OD, MD, PhD, RN, CPOA, CPOT, ABO, NCLE, COT, or COMT.
- Speakers must be well qualified to present the course for which they have been approved.

Course content should enhance the knowledge and skill level of the paraoptometric and provide a benefit to the care of the patient and practice. Clarity of the connection between the objectives and skills to be learned and the optometric profession increase the chance of approval. **The most common reasons for course disapproval are applications that do not provide detailed outlines or courses that do not appear to be relevant.**

All course and speaker documentation for a single request for review must be submitted within a period of no more than 1 week. Confirmation of receipt will be emailed to contact listed on cover sheet. Multiple submissions for the same presentation/meeting/conference will be billed as separate submissions when received over a period of more than 2 weeks. Additional processing fees will apply.

***Note: The CPC does not review course content detail and is not responsible for the course presentation.***

### **Web-Based Opportunities**

For web-based or self-study programs, providers must submit a copy of the materials that will be viewed by the attendee as well as access to the web content.

- Author qualifications must be submitted in a resume' or CV.
- If requesting approval for courses that will be available as online opportunities, provide a temporary username and password as well as the URL where courses can be viewed by the review committee.
- A quiz of at least 10 questions for every credit hour awarded must be a requirement for issuance of continuing education credit and must be provided as part of the review.
- It is the responsibility of the education sponsor to provide a CE form to participants that includes the CPC course ID number.
- Approvals are valid for 3 years.
- The fee for review of online programs is \$50 per credit hour.
- Education sponsors must maintain a list of participants for at least 4 years that may be made available to CPC™ upon request.



## Processing Fees

Applications should be submitted for review at least 8 weeks prior to the presentation to avoid a late fee.

**Fee Chart**

AOA Optometric/Paraoptometric Affiliate	\$75 application fee		
In-Office Staff Only Presentation	\$50 application fee		
All other organizations, including online presentation	\$50/credit hour	Maximum Charge \$2000	
Review of previously CPC-approved (expired) courses	\$25/credit hour		
LATE FEES	Less than 8 weeks prior to event - \$50	Less than 6 Weeks prior to Event - \$75	Less than 4 weeks prior to event - \$100

Applications received less than 8 weeks prior to the presentation will be assessed a late fee as noted on the chart above or will be rejected without review. The late fee applies to all organizations, including any AOA state optometric or paraoptometric affiliates. If a course is denied approval, the application may be revised and submitted one time without incurring an additional fee. Education sponsors will be invoiced when the approval letter and CE form templates are issued. Unpaid charges may result in refusal to review future requests until payment is received.

## Review and Approval Process

The Application for CE Review and Approval is available on the AOA website. Applicants will need to complete only one online application, attaching a detailed and timed course outline with a speaker resume' or curriculum vitae for each course requiring review. Up to 10 documents may be attached to a single application. (Hint: To avoid having to submit multiple applications, combine multiple courses given by a speaker or speakers with his or her resume'/CV into a single Microsoft Word or PDF document to attach to the cover sheet.)

The applications are processed weekly by the Commission on Paraoptometric Certification (CPC™) office and are then forwarded for review and determination of approval to the CPC™ Continuing Education Review Committee, which is comprised of certified personnel. The committee reviews each submission and awards credit based on the established criteria.

- Complete requests for review must include all course outlines and speaker information. Do not submit a request for review until all information has been compiled into a single submission.
- Incomplete applications will be returned without review.
- All information must be submitted using the online Wufoo form available on the AOA website: [www.aoa.org/paraoptometrics/tools-and-resources/information-for-education-providers?sso=y](http://www.aoa.org/paraoptometrics/tools-and-resources/information-for-education-providers?sso=y)
- Applications must be submitted to CPC™ with required documentation at least 8 weeks in advance of the program to avoid a late fee.

- Applications not received 8 weeks in advance of the program presentation date will be subject to a late fee (see fee chart).
- Program providers will be notified of the committee's determination within four weeks of receipt of the completed application.
- An approval letter, invoice for the review, and a CE form template for each approved course will be provided by email to the contact listed on the application cover sheet after the review has been completed.
- Payment of the review fee is due upon receipt of the invoice.
- Each approved course will be assigned a unique identifying course ID number which must appear on any CE form issued to attendees.

**NOTE: Any change to the title, content, or speaker requires a new review, and if approved, assignment of a new course ID.**

*CPC™ reserves the right to monitor the programs for which it has granted approval.*

### Length of Approval

Credit for a program is valid for three years from the approval date. Education providers must maintain a listing of attendees for a minimum of four years and must be made available to attendees or the CPC office.

### Disclaimer for Program Brochures

Providers of programs intended to prepare attendees for CPC certification examinations are required to publish the following disclaimer on all program advertisements, brochures, or notices.

*The Commission on Paraoptometric Certification (CPC™) does not constitute an endorsement concerning review courses and study materials or any lecturer and does not imply a guarantee that candidates will be successful in passing the CPC™ Certification Examinations.*

### Credit Hours and CE Forms

The committee awards credit hours in one-hour increments (50 minutes=1 hour=1 CEC). Credit hours are issued for actual instruction time and include a question/answer session, but exclude time spent on registration, introductions, pre and post-tests, breaks, and completion of course evaluations. Credits are awarded based on course descriptions, learning objectives, outline, and speaker qualifications.

**Credit will not be awarded retroactively.**

Continuing education credit forms must be issued to attendees.

- Upon course approval, the CPC™ will email a printable CE form template for each approved course to the individual who is listed as the contact on the cover sheet.
- Education sponsor is responsible for providing a CE form to each attendee.
- The form must be validated by a unique sponsor stamp or signature.
- If a participant arrives late or leaves early, the sponsor must not provide or validate the form.
- Ensure that only participants who complete the entire program receive a validated form.
- Any unused forms must be destroyed.
- Credit will not be awarded to those presenting forms without validation.

- Sponsor will retain attendance records for a minimum of four years from presentation date and records must be made available upon request from the CPC™.

Organizations that choose to provide their own CE form or post-attendance verification letter must clearly indicate which courses are **CPC-approved**. These forms must contain the following information in order to be accepted toward renewal of paraoptometric certification:

- Education sponsor
- Date, location, and program/event title
- Title of course and speaker(s)
- Number of credits awarded by the CPC™
- CPC™ course ID# that was assigned during review process
- If other non-CPC™ approved courses are listed in a verification letter or CE form, indicate which other organization(s) provided approval(s) and the corresponding course ID(s) (ie., ABO, NCLE, JCAHPO, or COPE)

### Ordering CE Forms for Currently Approved Courses

Organizations or speakers may order CE forms for currently approved courses for presentation during the three-year approval period by emailing [cpc@aoa.org](mailto:cpc@aoa.org) at least 2 weeks in advance of the presentation date(s). Include the sponsoring organization name, program/event name (for example: 10<sup>th</sup> Annual Fall Meeting) meeting date, location, course title, speaker name(s), number of credits awarded, and CPC™ course ID (if known). Organizations may submit one request per meeting for CE form templates at no charge for approved courses. Note that a \$25 processing fee will apply for each additional request for CE form templates for the same meeting.

*Note: The CPC™ does not provide CE forms for any other organization's approved courses.*

## What not to do!

1. *Do not submit bios in place of a resume' or CV. Speaker qualifications and experience are required. (See page 9 for a sample resume'.)*

### Rolando Cruz Resume'

Rolando Cruz is a native of Mexico City and has lived in Portland, Oregon since 1996. Since 2008, Rolando has been an optician in the Portland area. His background and experience in the eye care field has led him to a number of speaking opportunities both regionally and nationally. Rolando received his Bachelor of Science in Communications at Oklahoma Christian University and a Masters in Management and Organizational Leadership at Warner Pacific College in Portland, Oregon. He has been married to his lovely wife Bonnie for 20 years. They have 2 children. Rolando enjoys kayaking and basketball in his spare time.

2. *Don't submit an incomplete outline or a PowerPoint presentation in lieu of an outline. Information to be presented must be in outline format and timed. Reviewers should be able to use the outline as a guide to a good understanding of what information will be presented. PowerPoint presentations may be submitted as supporting documentation – not as replacements for an outline. (See page 10 for a sample timed outline.)*

### Outline

Title: Urgency or Emergency

Presenter:

Course Description: Is the situation an urgency or an emergency?

Course Length: 2 hours

Course Objectives:

Learn the difference between an urgency and an emergency?

Course Outline:

- What's an urgency?
- What's an emergency?
- Triage
- The patient's point of view
- How to bill and code the office visit



## Sample Paraoptometric/Optician Resume

### Career Objective

To obtain a challenging position as a paraoptometric or optician in a company that values ethics and a commitment to the community.

### Supportive Qualifications

- CPOT and ABO certified
- Extensive experience in a large retail environment
- Expert experience with tools and equipment for repair of eyewear as well as pre-testing
- Experience with lens design for cosmetic and prescriptive purposes
- Broad based knowledge of lens and frame trends

### Experience

*United Optical, Columbia, MO (May 2007- September 2010)*

#### Paraoptometric/Optician/Office Manager

- Supported optometrist with initial patient pre-testing
- Responsible for meeting sales goals of premium products
- Educated patients on the importance of regular eye exams and taking care of their eyewear
- Insertion and removal training of new contact lens wearers
- Aided manager and optometrist to ensure patient received the best care and satisfaction
- Processed insurance claims
- Inspected the accuracy of incoming orders to ensure cosmetic and prescription requirements

*For Eyes, Columbia, MO (August 2006-May 2007)*

#### Optician

- Achieved sales goals and business objectives
- Assisted patients in selection and fitting of frames
- Processed insurance claims
- Extensive knowledge and use of optical math
- Repaired eyewear

*America's Best Contacts and Eyeglasses, Columbia, MO (October 2002-August 2006)*

#### Receptionist/Optician/Optomtric Technician

- Controlled the flow of patients to ensure quality customer service
- Aided in optical sales
- Performed insertion and removal training of new contact lens wearers
- Administered the pre-screening of patients including refraction, visual field test, and glaucoma screening test
- Performed lens treatments such as tinting and neutralizing lenses

### Education

Colorado Technical University, Colorado Springs, CO  
Bachelors in Health Care Management

American Intercontinental University, Buckhead, Georgia  
Associates in Business Management

Northern High School Baltimore, Maryland  
High School Diploma, 1996

CPOT Certification  
ABO Certification - Licensed Optician - Missouri

## Speaking Engagements

Optometry's Meeting 2016 – Seattle, WA

SECO International 2015 – Atlanta GA

### Sample Basic Timed Outline Format

Good organization is essential any time you need to communicate ideas to another person or group of people. It helps them focus on what is being presented, understand how ideas are related, and retain the information better.

Regardless of your audience, purpose, or content, the following outline format will help you determine the best placement of the information you need to convey. Remember to start with the body – decide on your main points first – and then proceed to develop an introduction and conclusion. All decisions about content and organization should be made with the course objectives in mind. What knowledge is the audience expected to gain from your presentation? The number of main points and sub-points depends on the topic and content you intend to convey as well as the length of the presentation.

- I. Introduction (5 minutes)
  - a. Attention-getter (How will you make the audience interested and want to listen?)
  - b. Establish credibility (Why are you qualified to speak on this topic?)
  - c. Thesis (What is the main focus of your presentation?)
  - d. Preview (What will your main points be in this presentation?)
- II. Body
  - a. First main point (15 minutes)
    - i. Supporting information/ideas/material
    - ii. Supporting information/ideas/material
  - b. Second main point (10 minutes)
    - i. Supporting information/ideas/material
    - ii. Supporting information/ideas/material
  - c. Third main point ( 10 minutes)
    - i. Supporting information/ideas/material
    - ii. Supporting information/ideas/material
- III. Conclusion (10 minutes)
  - a. Signal to the audience that you've finished with your main points
  - b. Review the main points
  - c. Provide closure
  - d. Questions?

The above is just an example of timing and is dependent on topic, content, and course length. **Timing of presentations is required for CPC approval of courses.**

## Organizing Your Oral Presentation

**Outline three to five main points** that will help you meet your objective in giving the presentation. You can write an outline in words and phrases or in complete sentences, but it is best to favor short phrases over complete sentences. Be sure to include appropriate supporting material (statistics examples, anecdotes, jokes, expert opinions, quotations, etc.). Outlining your points will:

- help you to see key words easier
- let you add to your notes at the last minute without crowding
- allow your speech to flow more naturally

**Choose the organizational pattern that best suits your objectives.** Some common organizational patterns include:

- Topical (moves from idea to idea, theme to theme, etc.)
  - Chronological (uses time sequences for a framework)
  - Classification (presents information according to discrete categories)
  - Problem/Solution (presents a problem with one or more solutions to it)
  - Cause/Effect (a popular and specific version of the problem/solution model)
  - Don't forget to frame your presentation with both a discernible **introduction and conclusion**.
- The **introduction** should:
    - get the audience's attention
    - present your topic in a clear and compelling fashion
    - show the topic's importance, relevance, or interest
    - forecast the main appoints or major ideas of your presentation
  - The **conclusion** should:
    - inform the audience that you're about to close
    - summarize the main points of your presentation
    - leave the audience with an idea or concept to remember or to ponder