

Criteria for Continuing Education Handbook

Published by:

The American Board of Opticianry -
National Contact Lens Examiners
6506 Loisdale Road, Suite 330
Springfield, VA 22150

Phone: (800) 296-1379

(703) 719-5800

Fax: (703) 719-9144

www.abo-ncle.org

Mission Statement: The purpose of ABO-NCLE, Inc. is to recognize qualified opticians and contact lens technicians at various levels of proficiency for the consumer and the ophthalmic community by: (1) certifying those who pass the professionally-developed examinations, and (2) requiring and promoting approved continuing education for recertification.

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I. Welcome

To all providers of ABO and NCLE continuing education

Welcome to the new online *Criteria for Continuing Education Handbook*, your guide for offering and/or renewing ABO and NCLE recertification courses. This updated handbook is intended to make it easier for Speakers and Meeting Sponsors to navigate the approval process, and to ensure high standards of continuing education for our certificants. This on-line handbook replaces the previously-used burgundy ring binder, which contains outdated information and forms that may no longer be accepted. Please discard the old hardcopy handbooks, and use only the version on the ABO-NCLE website.

Speakers and authors who wish to provide continuing education approved by the ABO-NCLE must first be approved ([New Speaker Application](#)). Speakers qualified to provide technical information on optical topics at the basic to intermediate level may apply for Technical Level I and II; those with extensive technical training, knowledge and experience should seek approval for Technical Level III. Speakers who wish to give courses on non-optical topics pertinent to our certificants should apply for General Knowledge approval. General Knowledge courses have only one level. Any speaker approved for Technical courses is automatically approved to provide General Knowledge courses as well.

When speakers agree to provide a lecture or article, they must supply the meeting sponsor, organizer, or publisher with: the course title, description, and outline; speaker approval classification and level; the suggested course classification and level; intended audience and teaching methods; and the last four digits of the speaker's social security number. This can all be done on the [New Course Application](#).

Meeting sponsors will then provide the information and other requirements necessary to complete the application process.

We hope you will find this handbook to be a useful guide to help you with the CEC course approval process. As always, we welcome your input, questions or suggestions. By working together, it is our sincere hope that those who are ABO and NCLE certified will continue to receive the quality of continuing education that enables them to uphold the high standards of professionalism that they represent within the ophthalmic community.

II. Introduction

The American Board of Opticianry – National Contact Lens Examiners (ABO-NCLE) defines continuing education as planned learning experiences that maintain and enhance the technical skills and knowledge of ophthalmic professionals to deliver quality services to the public and to the profession in a competent, professional manner.

These Criteria for Continuing Education (Criteria) are provided to better ensure quality and consistency in educational offerings for ophthalmic professionals. There are many educational experiences which provide learning and advance the ophthalmic profession; however, only courses which are planned and administered in accordance with the Criteria are assured of being accepted for recertification credit. Failure to follow these criteria may result in denial of CEC approval for courses, instructors or sponsors.

ABO-NCLE exists for certification and educational purposes. We review, promote and approve continuing education for recertification. It is our belief that instructors and sponsors who follow these criteria will be successful in enhancing the professional abilities of ABO- NCLE Certificants.

III. General Information

A. Applying for Course Approvals

When should I apply for course approval? ABO-NCLE recommends new course submissions be made about four months before the meeting, and *must* be received eight weeks prior to the meeting date.

When should I request paper CECs for an approved course? CEC requests must be received at least two weeks prior to the meeting date.

Does the ABO - NCLE approve courses that have already taken place? No. Retroactive approval is not given; all courses must be pre-approved.

How many copies must I submit? Submit one copy of the application and any attached documents.

Do course approvals expire? Yes. Courses pertaining to new products or technology, and panel discussions, are approved for two (2) years. All other courses are approved for five (5) years.

Where can I get help on completing the application form? If you cannot find what you need in this handbook, call ABO-NCLE at (800) 296-1379 or (703) 719-5800.

What are approved statements for course announcements? If your promotional materials are printed prior to notification of approval and you wish to include a statement about the status of the course the following statement may be used:

This course has been submitted to the American Board of Opticianry - National Contact Lens Examiners for continuing education credit.

Promotional materials *cannot* indicate the course level until the course level is approved by ABO-NCLE. **Once the course is approved, all promotional materials *must* indicate the course level.**

Level III courses can only be taught by speakers approved at Level III.

Under no circumstances shall course approval be indicated in marketing material until final approval has been granted.

B. Applying for Print and Online Article Approvals

1. Courses presented as written articles, in print and/or online, must be submitted with complete content, along with a New Course Application with the author's signed affidavit (see application). Author must be approved prior to submission of courses.
2. The body of the article must contain 3,500 words per credit hour at the time of submission.
3. Twenty multiple-choice test questions must be included per credit hour:
 - a. Questions should be scrambled rather than follow the exact order of topics in the text
 - b. Include four possible answers for each question, with only one correct answer
 - c. No negative questions with the words "not" or "except" in the stem
 - d. No "All of the above" and no "None of the above" answers
4. An answer key with the correct answers marked must be submitted.
5. Passing grade is 80% or higher.
6. Placement of CEC article in relationship to advertising: no break in text; no advertising should be contained within the body of the article.
7. ABO-NCLE requests that no advertising related to the content of the article be placed directly before or after the article.
8. Signed statements from two currently certified dispensers/technicians affirming completion of the course in no less than the number of credit hours requested for approval.
9. Sponsor will be responsible for appropriate CEC distribution in accordance with ABO-NCLE regulations.

C. Applying for Live and Recorded Webinar Approvals

1. A new course application must be submitted with the presenter's signed affidavit (see application), the course description, timed outline, and meet all other criteria applicable to lecture courses.
2. Speakers must be approved prior to the submission of the course.
3. Paper CECs must be requested at least two weeks prior to date of webinar.
4. Attendees must pre-register before the course and be given an ID for access to the webinar.
5. For recorded webinars that are available on-demand, four polling questions are to be asked during the presentation, to which the attendee must respond within one minute or the program will revert back to the previous segment, so the attendee is required to sit through that segment again. At the end of the course, sixteen more questions are asked, for a total of twenty questions. If more than four out of the twenty are wrong, the attendee fails and will not receive a CEC.
6. Live webinars do not require polling questions, but do require twenty questions at the end of the course.
7. Twenty multiple-choice test questions must be included per credit hour:
 - a. Questions should be scrambled rather than follow the exact order of topics in the webinar
 - b. Include four possible answers for each question, with only one correct answer
 - c. No negative questions with the words "not" or "except" in the stem
 - d. No "All of the above" and no "None of the above" answers
8. An answer key with the correct answers marked must be submitted.
9. Passing grade is 80% or higher.
10. Include the following statement after the test questions: Course attendees may send any comments about courses and/or speakers to mail@abo-ncle.org.
11. Sponsors will validate paper CECs with their stamp, put attendee name on all three parts of CEC, and send to the attendees who pass. A roster of passing attendees must be kept by the sponsor for three years after the webinar is no longer available.

D. Policies and Requirements

1. Those who review course submissions for CEC approval rely most heavily on a detailed course outline with time references. It is not enough to merely state the main topics of the course. Including sub-topics, and how much time will be spent on each segment of the course, will greatly enhance the prospects for course approval.
2. We ask speakers to provide sponsors with a course description of 25-50 words. In addition, a list of learning objectives shows how the course is of importance in opticianry and/or contact lens fitting. Often, courses are disapproved because it is not clear how they pertain to the skills or knowledge used in the optical field. Please use the course description, as well as the detailed course outline, to show what attendees will learn, and how your course relates to the practice of opticianry or contact lens fitting.
3. Please note that an application fee must be submitted with every Course Approval application. If the course's intended speaker has not yet been approved, an application for Speaker Approval must also be sent along with the appropriate fee. If the course is Technical, the course approval fee is \$75; the General Knowledge course approval fee is \$100. Failure to submit the appropriate fee(s) will result in the return of the submission. If a course is disapproved, the application may be revised and resubmitted one time without incurring an additional processing fee.
4. Courses related to new technology or products, and panel discussions, will only be approved for a period of two (2) years. All other courses may be approved for up to five (5) years. Review courses to prepare for the basic ABO or NCLE certification exams are not eligible for continuing education credit. All approved courses must be updated and submitted for re-approval upon expiration. All re-submissions will require the appropriate application fee - \$75 for Technical courses; \$100 for General Knowledge courses.
5. Ordering of paper CECs for approved courses is the responsibility of the meeting sponsor, not the speaker. Paper CECs must be requested a minimum of two weeks prior to the date of the meeting. Failure to comply with these guidelines will result in the denial of the request. Please refer to the [Timetable Checklist](#) in this handbook for meeting guidelines.
6. With new developments in the optical field, and in the certification process, it is our expectation that there will be ongoing additions and/or revisions to the criteria. We ask that you refer to this online handbook on a regular basis to avoid delays in the approval process.

IV. COURSE CRITERIA

Each course must adhere to the following criteria:

1. A course description and list of learning objectives must be developed by the speaker for each course, describing in general terms what should be learned by the participants.
2. The speaker's detailed outline showing time references and specific skills to be learned must be submitted for each course.
3. The intended audience and content level must be specified by the speaker.
4. Course content must be generic in nature and presented in an objective manner.
5. Courses submitted for more than two (2) hours must be split up and submitted as Part 1, Part 2, etc. The course length and method of presentation must be indicated on the course application.
6. Speakers must be qualified by education or experience to provide quality instruction in the relevant subject area, and must be approved by ABO-NCLE for each course level they are presenting. Speakers seeking approval for Level III courses must be approved as a Level III speaker.
7. Attendees must be invited to evaluate the course and speaker by sending comments to mail@abo-ncle.org.

Each criterion is explained further in the following pages.

**FAILURE TO FOLLOW THESE CRITERIA WILL RESULT IN
DENIAL OF CEC APPROVAL TO COURSE SPONSORS**

A. Criterion One: Course Description

A course description must be submitted for each course, describing in general terms what should be learned by the participants.

The course description must state, in general terms, the knowledge or skills participants are expected to obtain as a result of the course.

Educational courses must be relevant to the ophthalmic profession and enhance the ability of attendees to perform their professional duties.

Knowledge and skills listed in the ABO Job Analysis or NCLE Job Analysis represent worthwhile knowledge and skills for continuing education course descriptions.

Other valid skills might represent the solution or proper response to a problem or situation frequently encountered within the ophthalmic profession. Courses designed to provide this knowledge are more likely to be considered as “general knowledge” courses, and their application to the ophthalmic profession might be less obvious than “technical” courses. It is especially important for the course description to show how this course will meet a perceived need of ophthalmic professionals or contact lens technicians.

Conducting an educational needs assessment is an excellent way to determine what types of knowledge and skills would be helpful to the intended audience. Surveys, discussion groups and interviews with members of the target audience are some of the more common methods of identifying needs within the group. This information can be used to plan a program that is more likely to be well attended and may also be incorporated into the course description to help explain why the course should be approved for continuing education credit.

The course description should be between 25 and 50 words in length. The description should be accompanied by a list of three or more learning objectives for each hour of instruction. For example, learning objectives for a course entitled “Managing Astigmatism with Soft Contact Lenses” may look like:

After attending this class, participants will be able to:

- recognize different amounts and types of astigmatism;
- classify available soft lens options by power and design;
- select the soft lens option(s) that offers the greatest chance of success on an individual basis;
- evaluate diagnostic lenses for fit and vision.

B. Criterion Two: Detailed Outline

A detailed* outline showing main topics, sub-topics, and time references, must be prepared for each course.

The course outline should list the specific skills, activities or items of information which course attendees will be expected to incorporate into their professional duties in order to help them achieve the general knowledge and skills mentioned in the Course Description.

Detailed outlines help ABO-NCLE determine course content. They also serve as an informal contract between the sponsor, the speaker, and the audience; and they provide the basis for attendees to evaluate the effectiveness of the course. To that end, a written handout or slide detailing the specific skills to be learned should be presented to attendees at each course.

This list of specific skills to be learned becomes especially important for courses that are not directly related to the [ABO Job Analysis](#) or [NCLE Job Analysis](#). The same is also true for courses seeking approval for multiple credit hours, or for Level III designation. Such courses are subject to more stringent standards.

* While sufficient detail for proper evaluation is appreciated by the ABO-NCLE reviewers, too much detail can slow down the approval process. Please do not substitute entire PowerPoint presentations for a course outline.

The easier it is to see the connection between the specific skills and their application to the ophthalmic profession—the easier it is to approve the course.

Some guidelines for writing outlines that list specific skills intended to be learned:

Refer to the [ABO Job Analysis](#) or [NCLE Job Analysis](#) to ensure that you relate to specific skills and knowledge required in the practice of opticianry and/or contact lens technicianry.

Each specific skill should be listed as a main topic (at least three main topics per credit hour). State how much time will be dedicated to each skill.

Specific information or discussion topics that will be presented in order to achieve each skill should be listed as sub-topics in the outline. This is important in that it gives course reviewers an idea of how thoroughly each topic will be presented. Sub-topics within the outline can also be used to demonstrate how each skill relates to the ophthalmic professional.

The two most common reasons for disapproval of courses are:

1. Course outlines are not specific enough, or do not include time references.
2. Course content does not appear to be relevant to the needs of ophthalmic professionals.

C. Criterion Three: Audience and Content Level

The intended audience and suggested content level must be specified.

The most frequent complaint from course attendees is that the course content was too basic or not relevant to their needs. Using an educational needs assessment and matching general knowledge and skills to the needs of the intended audience will ensure that the course is relevant. Communicating the course content level will help potential attendees to decide if the course is right for them.

Content level should be requested* by the speaker as **Level I** (basic), **Level II** (intermediate), or **Level III** (advanced).

Level I designation assumes the audience has little or no prior knowledge of the material being presented.

Level II assumes some prior knowledge or experience.

Level III assumes the attendees have the background and experience to appreciate and understand the course material. Only speakers certified at Level III can teach Level III courses.

*Final designation of course level is made by ABO-NCLE.

Courses will also be designated as either **Technical** or **General Knowledge**.

Technical courses are those that relate directly to skills or knowledge that are optical in nature, and appear in the ABO Job Analysis or NCLE Job Analysis. General Knowledge courses are those that will enhance the abilities of ophthalmic professionals, but are usually not optical in nature.

Course offerings should be made reasonably accessible to all ophthalmic professionals and not restricted solely to those who maintain membership or employment in specific organizations.

D. Criterion Four: Course Content

Course content must be generic in nature and presented in an objective manner.

Educational courses designed to promote one company's products or services are not acceptable for ABO-NCLE continuing education credit.

Specific product brands may be mentioned and described within a course, but such presentations should always be as balanced as possible with respect to competing companies or products.

Speakers and sponsors involved in the manufacturing, distribution, marketing, sales and servicing of products and services are expected to exercise caution and good judgment in separating promotional concerns from educational courses.*

Totally new and innovative technology is often non-generic in nature, but may still be an appropriate topic for continuing education. Courses relating to such innovations will be judged on an individual basis.

All courses must be monitored, and those that fail to adhere to these guidelines may be denied CEC approval. Industry vendors, sponsors or speakers who fail to honor this criterion may be removed from the ABO-NCLE approved listings.

***A sponsor's logo may only appear on the first and last slide of a presentation.**

***Speakers sponsored or employed by an industry vendor must include a signed statement with their application, (except for new technology or a new product), pledging that the course content will be presented in a generic and objective manner.**

E. Criterion Five: Length of Course

The course length and method of presentation must be indicated on the course application.

A minimum of 50 minutes of instruction must be allotted for each hour of credit requested. Questions and answers may be entertained afterward. It is best to plan an hour for each credit, which will allow courses that finish a few minutes early to still fulfill the 50-minute requirement. Hours are based on actual instruction time excluding coffee breaks.

Courses can only be submitted for a maximum of 2 hours. Courses submitted for more than 2 hours must be split up and submitted as separate courses.

The method of presentation — lecture, hands-on, article*, live webinar*, recorded webinar*, other — shall be indicated. This will help course evaluators to judge the appropriateness of the course and will also help attendees to know what to expect when they take the course.

*Please refer to the special requirements for articles and webinars.

As part of the course evaluation process and to ensure compliance with these criteria, ABO-NCLE reserves the right to monitor, record and evaluate--without prior notice and without charge-- any approved educational meeting.

F. Criterion Six: Speaker Qualifications

Speakers must be qualified by education or experience to provide quality instruction in the relevant subject area, and must be approved by ABO-NCLE for each course they are presenting.

Speakers are approved as either general or technical knowledge. Technical course content is determined as one of three levels: **Level I** (basic) and **Level II** (intermediate); or **Level III** (advanced). General knowledge courses are not distinguished by levels. Level I and II Technical speakers may only provide Level I (basic) and Level II (intermediate) courses, but not Level III courses. Level III approved speakers may provide Level I, II or III courses.

A speaker's qualifications can be judged, in part, on education and training, work experience, recognition by peers, previous speaking performances, publications, and professional credentials. All speakers presenting Technical courses must be certified by ABO-NCLE or another appropriate certifying agency (JCAHPO, RN, etc.). Doctors (MDs and ODs) automatically meet the certification requirement, but must still be approved at a certain level. Persons with credentials other than those required by ABO-NCLE, or those giving General Knowledge courses, may be granted conditional approval by the ABO-NCLE Education Committee.

Technical courses are those that relate directly to skills or knowledge that are optical in nature, and appear in the [ABO Job Analysis](#) or [NCLE Job Analysis](#). General Knowledge courses are those that will enhance the abilities of ophthalmic professionals, but are usually not optical in nature.

ABO-NCLE cannot verify a speaker's communication skills. It is the responsibility of course sponsors to obtain speakers who will best present the material in a manner that keeps the audience engaged in the learning process. Always check references of your speakers. Consistently poor reviews for either a course or a speaker could result in the rescinding of ABO-NCLE approval for continuing education credits.

G. Criterion Seven: Evaluations

Each attendee will be invited to evaluate the course and speaker.

ABO-NCLE wants course attendees to have the opportunity to evaluate speakers and courses. This opportunity will now be offered electronically, by inviting attendees to send comments to mail@abo-ncle.org.

We ask that sponsors and speakers assist in this effort by doing the following:

Sponsors – Please include the following statement in all promotional materials for your program: Course attendees may send any comments about courses and/or speakers to mail@abo-ncle.org.

Speakers – Please present the following statement in your slides and/or handouts: Course attendees may send any comments about courses and/or speakers to mail@abo-ncle.org.

Also, announce this invitation to your audience at the time of the presentation.

No CEC may be validated until at least 50 minutes of course time has transpired for each hour of credit received. Paper CECs must be validated by stamping with sponsor's stamp. If a participant arrives late or leaves early so as not to have completed the required amount of instructional time, the sponsor may not validate the CEC.

To ensure the integrity of the continuing education process, be sure non-participants do not have access to paper CECs. All unused CECs must be destroyed after the meeting. If you run out of paper CECs you must contact the ABO-NCLE for instructions. CECs may not be copied.

Failure to comply with the proper procedures for distribution and validation of CECs may result in loss of privilege to serve as a provider of ABO-NCLE-approved education.

V. Sample Course Topics

A. ABO Topics

This list is included to illustrate the TYPES of topics that might be covered in either Technical or General Knowledge continuing education courses. It is NOT to be regarded as a COMPLETE list, but is here only to help give Speakers and Sponsors a better understanding of Technical versus General Knowledge topics.

i. Technical Courses

- Ophthalmic Terminology
- Optics
 - Ophthalmic Optics
 - Geometric Optics
 - Theoretical Optics
 - Practical Optics
 - Lens characteristics
 - Centration
 - Optical centers
 - Major Reference Points
 - Measurements
 - Segment heights
 - Prism
 - Desired prismatic effects
 - Unwanted prismatic effects
- Ocular Anatomy and Physiology
 - Anatomy of the Eye
 - Physiology of the Eye
 - Refractive Errors and Refractive Status
 - Anatomical Considerations for Fitting Criteria
 - Anomalies
 - Visual Pathway
 - Ocular Pharmacology
 - Triage
 - Ocular Conditions & Pathology
 - i.e. Glaucoma, cataracts, macular degeneration, etc.
 - Age-Related Accommodation Issues
 - Coordination of Eye and Head Movements
 - Others
- Principles of Refraction
- Transposition
- Optical Dispensing
 - Customer/Patient History
 - Relationship between the prescription and finished product
 - Format and Content of Prescription

- Analysis and Interpretation of Prescriptions
 - Visualizing the prescription
 - Use of the Lens Cross
- Considerations for dispensing based on refractive errors (equal or unequal)
- Lenses
 - Characteristics of lenses
 - Single Vision
 - Multifocal
 - PAL's
 - Occupational
 - Safety and Sports
 - Specialty Lenses
 - Other Characteristics
 - Base Curves and Relationship of Changes and Thickness
 - Lens Materials
 - Characteristics and properties
 - Lens Design
 - After-Market Treatments, Coatings, Tints, Selective Filtrations, etc.
 - Lens Selection – Material, Blank Size, Thickness
- Common Prescription Irregularities
- Frames
 - Frame Materials
 - Metals
 - Plastics
 - Specialty Materials
 - Safety/Industrial/Sport
 - Care and Handling
 - Frame Design
- Care of Lenses, Treatments, Frames, etc.
- Patient Advisement
- Fitting and Adjusting
 - Measurements
 - Vertex Distance
 - Tilts
 - Use of Hand Tools
 - Fitting Triangle
- Dispensing Procedures and Methods
- Verification and Inspection
- Observation Techniques
- Identification of changes in customer's/patient's old eyewear and new eyewear
- Infection Control
- Instrumentation and Equipment
 - Ophthalmic Instrumentation and Equipment
 - Optical Instrumentation and Equipment
 - Use of focimeter (lensometer, vertometer, lens meter), lens clock, calipers, distometer, etc.
 - Calibration and Maintenance
 - Infection Controls and Hygiene
 - Handling and Disposing of Hazardous Materials and Waste
 - MSDS

- Optical Fabrication Procedures & Processes
- Sight Testing
- Technology
 - Technology of New Products Available
 - Technology of Old Products

ii. General Knowledge Courses

Any other topics that contribute to the effective professional practice of Opticianry and the health and welfare of the consumer, in so far as they relate specifically to Opticianry including:

- Governmental Standards and Regulations
 - Rules and Regulations
 - Ophthalmic Dispensing Law
 - Prescription Release
 - Standards of Practice
 - Scope of Practice
 - Ethics Related to Ophthalmic Dispensing and Practice
 - Health Care Law
 - Agencies
 - Food and Drug Administration (FDA)
 - Federal Trade Commission (FTC)
 - Environmental Protection Agency (EPA)
 - American National Standards Institute (ANSI)
 - American Society of Testing Materials (ASTM)
 - HIPAA – Can also be placed under HR
 - Medicare & Medicaid
- Regulatory Boards
- Professional Development
 - Front Office Procedures
 - Telephone Procedures
 - Patient Flow
 - Office Image
 - Dress Code
 - Professionalism
- Dispensing
 - Communication
 - Lifestyle Dispensing
 - Benefits and Limitations of Prescriptions for Visual Efficiency
 - Vocational and Avocational Needs of Customer/Patient
 - Cosmetic/Pathological/Therapeutic Needs of Customer/Patient
 - History
 - Questioning
 - Listening
 - Cosmesis of Eyewear (facial shapes, customer/patient coloring, other facial characteristics, proper frame selection)

- Recommendation of proper frames and lens combination based on lifestyle analysis
- Professional and courteous customer/patient relationship
- Resolving Conflict
- Patient Advisement
- Product Performance and Limitations
 - Duty to Warn
- Demographics and Dispensing
 - Age Related Dispensing
 - Pediatrics
 - Geriatrics
 - Between
- Human Resources
 - Employee and Policy Manuals
 - Management
 - Leadership
 - Hiring and Termination
 - Training
 - Scheduling
 - Conflict Regulation
 - Laws and Regulations
 - Agencies
 - The U.S. Equal Employment Opportunity Commission (EEOC)
 - Office of Civil Rights (OCR)
 - U.S. Department of Labor (DOL)
 - Occupational Safety & Health Administration (OSHA)
 - Department of Health Human Services (DHHS)
- Practice Management
 - Financial Issues
 - Business Planning
 - Financial Planning and Budgets
 - Financial Statements
 - Marketing Strategies
 - Basic Accounting
 - Advertising
 - Material Costs
 - Overhead
 - Payroll Cost
 - Reimbursement Systems (SSI, Medicare, Medicaid, health insurance, federal/state/local waivers and grants)
 - Monitoring Third Party Relationships
 - Basic Office Procedures and Record Keeping
 - Purchasing Decisions
 - Inventory Management
 - Practice Management Technology Software
 - Organizational Skills
 - Computer Skills
 - Practice Promotion, Marketing and Advertising
 - Purchasing Decisions

- Inventory Management
 - Records
 - Consumer Laws
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- Technical writing, developing educational materials, & instructional techniques
 - Areas outside the scope of practice such as: surgical techniques, medical diagnosis, medical triage, drug prescriptions, and any other topics that may arise and the decisions regarding relevancy will be at the sole discretion of the ABO-NCLE.

B. NCLE Course Topics

This list is included to illustrate the TYPES of topics that might be covered in either Technical or General Knowledge continuing education courses. It is NOT to be regarded as a COMPLETE list, but is here only to help give Speakers and Sponsors a better understanding of Technical versus General Knowledge topics.

i. Technical Courses

- Anatomy and Physiology
- Ocular pathology and physiology
- Drugs, systemic diseases, and ocular pathogens affecting contact lens wear
- Refractive errors, conversion of spectacle Rx to contact lens Rx
- Corneal defects, congenital deformities, injuries
- Principles of optics and visual pathways as related to contact lens wear
- Instrumentation usage and calibration: keratometry, corneal topography, lensometry, slit-lamp biomicroscopy, radiuscopy, other instruments used in inspection and verification of contact lenses
- Interpretation of instrument findings
- Fluorescein evaluation to evaluate lens fit and discern pathology
- Tear Film Evaluation
- Contact Lens Materials and Designs
- Determination of Lens Properties and Parameters
- History-Taking and Patient Selection
- Fitting Criteria, Techniques and Lens Evaluation
- Lens Manufacturing, Modification, and Polishing
- Contact lens care systems and solutions: components, ingredients, incompatibilities
- Lens disinfection, storage, care and maintenance
- Cleaning and disinfection of instruments, sinks, surfaces in the contact lens area
- Lens insertion and removal techniques
- Patient Instruction and Compliance
- Hygiene and Personal Care
- Normal and Abnormal Responses and Reactions to Contact Lens Wear
- ANSI Z80 Standards
- Contact Lens Emergencies and Triage

ii. General Knowledge Courses

- Lifestyle factors and their effect on contact lens wear
- Sources of Patient Records
- Storing Patient Data
- Ethics and Confidentiality
- Records Release Information
- Knowledge of fitter aids, product sources, consultation services
- Product Purchasing and Return Policies
- Telephone Skills

- Scheduling Fitting and Follow-up Appointments
- Human resources: job descriptions, work rules, employee grievances, safety training, interviewing, recruitment, wages, salary, benefits, standards for job performance, employee evaluation, work schedules, conflict resolution
- Interactions with other professionals, vendors, ancillary personnel
- Professional Societies and Continuing Education
- Product demonstrations and educational seminars to public
- Promotion of goods and services
- Participating in community vision programs
- Technical writing, developing educational materials, and instructional techniques
- Marketing strategies
- Basic accounting
- Business and financial statements
- Business Planning
- Financial Planning and Budgets
- Federal, state, & local guidelines (e.g. ANSI, FTC, OSHA, DHHS, FDA, HIPPA): knowledge and compliance
- Reimbursement Systems (SSI, Medicare, Medicaid, health insurance, federal/state/local waivers and grants)
- Consumer Laws
- Monitoring Third Party Relationships
- Inventory Control and Reordering Systems
- Storage Systems
- Product Recalls
- Patient Fees and Refunds

VI. Fee Schedule

The following fees apply to all continuing education applications and requests.

All fees are subject to change, and every attempt will be made to provide advance notice.

New Course Application Fee:

- A non-refundable application and processing fee must be submitted with each course application, due at least 8 weeks before the meeting date. For Technical courses, the application fee is \$75; For General Knowledge courses, the application fee is \$100.
- Late applications submitted 4-8 weeks prior to a meeting will be charged a late fee of \$50.00 for each course, in addition to the application fee.
- Late applications submitted 2-4 weeks prior to a meeting will be charged a late fee of \$100.00 for each course, in addition to the application fee.
- * Applications submitted less than two weeks from the date of the program may be rejected.
- ** All courses are given an expiration date. To renew courses upon expiration (or preferably before), courses must be submitted for re-approval, and all of the above fees apply.

New Speaker Application Fee:

- A \$50.00 non-refundable application and processing fee must be submitted with each speaker application, due at least 8 weeks before the meeting date
- Late applications submitted 4-8 weeks prior to a meeting will be charged a late fee of \$50.00 for each new speaker, in addition to the application fee.
- Late applications submitted 2-4 weeks prior to a meeting will be charged a late fee of \$100.00 for each new speaker, in addition to the application fee.
- All speaker approvals are given an expiration date of three years from the date of approval. To renew speaker status upon expiration (or preferably before), speaker applications must be submitted for re-approval, and all of the above fees apply.
- * Applications submitted less than two weeks from the date of the program may be rejected.

Paper Continuing Education Certificate (CEC) Requests:

- A \$10.00 processing fee will be assessed for each course.
- Paper CECs are \$10.00 if ordering 1-20; 21 or more are invoiced at .50 each.
- Requests for paper CECs must be submitted at least two weeks prior to the meeting.
- If CECs are requested less than 2 weeks, but more than 1 week prior to the meeting date, a \$50.00 late fee will be charged, in addition to the standard CEC fees.
- If CECs are requested less than 1 week prior to the meeting date, a \$100.00 late fee will be charged, in addition to the standard CEC fees.
- All charges are billed to the meeting sponsor unless otherwise indicated on the CEC request.

Shipping Charges:

- All orders will incur a shipping charge according to the actual shipping costs. All orders will be shipped via UPS unless FedEx is requested by the sponsor, or required for certain expedited shipping needs.
- *** Please note that all fees are non-refundable. If a meeting is canceled or rescheduled, the sponsor is still responsible for payment due on the first order, plus any new fees that may apply to a new order.

VII. Appendices

A - Application Checklist for Sponsors of CEC Programs

The following information is required before a new course submission is sent to the Education Committee for review. Failure to provide complete data will result in the return of the submission.

_____ A \$100, non-refundable application and processing fee must be submitted with each General Knowledge course application submitted at least 8 weeks prior to a meeting (Technical course application fee is \$75). Late submissions must also include the late fee designated in the ABO-NCLE fee schedule. Applications submitted less than two weeks from the date of the program may be rejected.

_____ Indicate whether you are seeking ABO or NCLE approval. If both, submit an application for each.

_____ Supply legible and complete information regarding sponsor representative, including phone number and email address.

_____ List course length (50 minutes = 1-hour credit)

_____ Identify the speaker's requested course classification: Technical courses are those that relate directly to skills or knowledge that are optical in nature, and appear in the ABO Job Analysis or NCLE Job Analysis. General Knowledge courses are those that will enhance the abilities of ophthalmic professionals, but are usually not optical in nature.

_____ Identify the speaker's desired course level: Level I (little or no prior knowledge); Level II (experienced with some prior knowledge); Level III (advanced topics with extensive experience). Only Technical courses have different levels; General Knowledge courses do not have different levels.

_____ Provide the speaker's course description of approximately 25 to 50 words stating in general terms what knowledge or skills the participants are expected to obtain, with learning objectives.

_____ Provide the speaker's detailed, typed, course outline listing the main topics of the course, specific sub-topics, and how much time will be spent on each segment of the course.

_____ Speakers who are industry vendors must provide a signed statement pledging the course will be presented in a generic manner.

Additional requirement for Level III submissions:

_____ Only speakers with Level III (advanced) approval can deliver a Level III (advanced) course.

Note: New course applications can take up to eight weeks to process. Plan ahead and submit applications at least two months prior to your program date. Remember that retroactive CECs will not be awarded.

B - Timetable Checklist for Sponsors of CEC Programs

Before the Course:

Number of Months Ahead:

- | | | |
|-------|--|----------|
| _____ | Conduct or review an educational needs assessment to aid in program planning | 6-12 |
| _____ | Arrange for meeting facility; contract with speaker(s); prepare promotional materials, including an invitation to attendees to evaluate the course and speaker by sending comments to mail@abo-ncle.org | 6-12 |
| _____ | Obtain, from speakers, the Course and/or Speaker information required on application forms (course descriptions, outlines, length, speaker approval level, intended audience, suggested content level, method of presentation, curriculum vitae, and signed affidavits where applicable) | 4-5 |
| _____ | Submit "Application for New Course and/or Speaker Approval" and fees. | 3* |
| _____ | Submit "Application for Paper CECs" for pre-approved courses and speakers. You will be invoiced for the fees. | 2 weeks* |

** Submissions after the deadline will incur late fees, or possibly be rejected.*

On the day of the Course:

- _____ Remind each speaker to announce, verbally or by PowerPoint slide, that attendees are invited to comment about courses and speakers at mail@abo-ncle.org.
- _____ Prepare a sign-in sheet. Monitor must make sure that all attendees sign in. Sign-in sheets should have the following information: name, address and e-mail. Sponsors must keep sign-in sheets on file for three years.
- _____ If using paper CECs, give one to attendees after they sign in. If scanning badges, make sure everyone gets scanned in.
- _____ Monitor should be seated outside of door once class starts. If an attendee leaves the room for any reason during a session, monitor must collect paper CEC or scan badge, and note the time the attendee leaves. Attendee must return within 10 minutes to be eligible to receive credit for the course.
- _____ Once class is over, monitor will stamp paper CEC with validation stamp or scan attendees out.
- _____ If you run out of paper CECs, contact the ABO-NCLE office as soon as possible. Do not copy CECs. Highlight the name of the person(s) who did not receive CEC so that you will know who did not receive one. Once additional CECs are received, fill out their name and address on each part, stamp with validation stamp and mail to attendees.

After the Course:

_____ Destroy all paper CECs that were not distributed

_____ If scanners were used, sponsor must provide a transcript to each attendee, showing course titles, course numbers and date of classes. This transcript is submitted to ABO-NCLE by the attendee for certification renewal.

C - APPLICATION FOR NEW SPEAKER APPROVAL

American Board of Opticianry _____ National Contact Lens Examiners _____
(Please check ABO or NCLE)

Guidelines for filling out this form are in the Criteria for Continuing Education Handbook

Name: _____ Date: _____ SS # (last 4 digits): _____

Company: _____ Position/Title: _____

Address: _____ Phone: _____

_____ Email: _____

City: _____ State: _____ Zip Code: _____

Requested Speaker Classification: Technical _____ General Knowledge _____

Technical courses are those that relate directly to skills or knowledge that are optical in nature, and appear in the ABO Job Analysis or NCLE Job Analysis. **General Knowledge** courses are those that will enhance the abilities of ophthalmic professionals, but are usually not optical in nature.

Requested Speaker Level (technical speakers only):

Level I (basic) and/or Level II (experienced) _____ Level III (advanced) _____

Technical course speakers must be currently ABO and/or NCLE certified or have credentials in optometry, medicine, nursing, or be ophthalmic/optometric certified allied health personnel. Level III (advanced) course speakers must have ABO and/or NCLE Advanced Level certification, or other applicable advanced degree(s). Anyone who does not meet these requirements may request a special review.

Please attach a resume or curriculum vitae that includes: education, work experience, teaching and/or speaking experience, specialized training, and certifications.

I agree that approved course content will be presented in a generic and objective manner. Specific brand names will be avoided in word, slide and study materials. Brand names will only be listed if names of all similar brands available in the industry are also listed.

Signature of Applicant

Date

NON-REFUNDABLE APPLICATION FEE OF \$50 IS REQUIRED WITH THE SUBMISSION OF THIS FORM. LATE FEES MAY APPLY. ALL SPEAKERS ARE APPROVED FOR A PERIOD OF THREE YEARS. BY DECEMBER 31ST OF THE THIRD YEAR OF APPROVAL, SPEAKERS SHOULD SUBMIT A RENEWAL APPLICATION AND A \$50 NON-REFUNDABLE FEE FOR RENEWAL OF SPEAKER STATUS.

Mail application to: ABO-NCLE, 6506 Loisdale Road, Suite 330, Springfield, VA 22150

D - APPLICATION FOR NEW COURSE APPROVAL

American Board of Opticianry _____ National Contact Lens Examiners _____ (Please check one)

This form is to be used for new course approval only. Please use a separate form for each new course submitted. This application must be completed in full or approval will be delayed or denied. A **Request for Continuing Education Certificates** (CECs) to schedule your meeting and request CECs must also be submitted at least two weeks prior to program date.

Guidelines for filling out this form are in the Criteria for Continuing Education Handbook

Sponsoring Organization _____ Program and Date _____

Sponsoring Representative _____ Daytime Phone _____ Email Address _____

Street Address _____

City & State _____ Zip Code _____

Course Title: _____

Speaker: _____ SS # (last 4 digits): _____

Is this speaker approved by ABO-NCLE? YES _____ NO _____

If speaker is not approved, an application for speaker approval must be submitted and approved prior to submitting this course.

If yes, at which classification? Technical _____ General Knowledge _____

If technical, at which level?

Level I (basic) & Level II (experienced) _____ Level III (advanced) _____

Course Length: _____ hour(s) (50 minutes = 1-hour credit) (2 hour maximum for lecture courses)

Course Classification: Technical _____ General Knowledge _____ (choose one)

Technical courses are those that relate directly to skills or knowledge that are optical in nature, and appear in the ABO Job Analysis or NCLE Job Analysis. **General Knowledge** courses are those that will enhance the abilities of ophthalmic professionals, but are usually not optical in nature.

If Technical, Course Level:

Level I (basic) _____ Level II (experienced) _____ Level III (advanced) _____

Intended Audience:

Opticians _____ Ophthalmic Technicians _____ Contact Lens Technicians _____ Other _____

Teaching Methods: lecture _____ hands-on _____ print media _____ live webinar _____ recorded webinar _____ other _____

Course Description: (A 25-50 word typed course description with learning objectives must accompany form)

Course Outline: (A complete, typed outline with time references must accompany form)

Return forms to: ABO-NCLE, 6506 Loisdale Rd., Suite 330, Springfield, VA 22150

APPLICATION FEE OF \$100 FOR GENERAL KNOWLEDGE COURSES IS REQUIRED WITH SUBMISSION OF THIS FORM; APPLICATION FEE OF \$75 FOR TECHNICAL COURSES.

E - Request for Paper Continuing Education Certificates (CECs)

Please check ABO or NCLE. (If you are submitting courses to both ABO and NCLE, please use separate forms.)

American Board of Opticianry _____ National Contact Lens Examiners _____

1) Sponsoring Organization:

4) Sponsor representative to whom communications and CECs will be directed:

Name

2) Program Location (city & state)

Street Address (No P.O. Box please)

City

State

Zip

3) Program Date:

Daytime Phone

Email

CEC requests must be received at least 2 weeks prior to the meeting date. Incomplete information will result in a delay or denial of distribution of CECs.

* You will be invoiced for your CEC order. Please do not include payment with application. A current fee schedule is located in the Criteria for Continuing Education Handbook.

* Please complete the Course and Speaker Information sheet below, listing *all* courses needing paper CECs.

Return all completed forms to:

ABO-NCLE

6506 Loisdale Road, Suite 330

Springfield, VA 22150

Phone: (703) 719-5800 or (800) 296-1379 for more information

Fax: (703) 719-9144

The ABO-NCLE reserves the right to audit, either in person and/or by taping (either audio or video), without charge or prior notice, any program that has been awarded continuing education credit. The sponsoring organization agrees to comply with all ABO-NCLE regulations and procedures. I, the undersigned, also understand that failure to comply may result in denial of CEC approval.

Signature of Meeting Sponsor

Date

Course and Speaker Information

1. Course Title: _____

Speaker: _____ SS # (last four): _____

Length of Instruction: 1hr _____ 2hr _____ Number of Certificates Needed: _____

Is this a new course or speaker? _____ NO _____ YES* *If yes, see instructions below

2. Course Title: _____

Speaker: _____ SS # (last four): _____

Length of Instruction: 1hr _____ 2hr _____ Number of Certificates Needed: _____

Is this a new course or speaker? _____ NO _____ YES* *If yes, see instructions below

3. Course Title: _____

Speaker: _____ SS # (last four): _____

Length of Instruction: 1hr _____ 2hr _____ Number of Certificates Needed: _____

Is this a new course or speaker? _____ NO _____ YES* *If yes, see instructions below

4. Course Title: _____

Speaker: _____ SS # (last four): _____

Length of Instruction: 1hr _____ 2hr _____ Number of Certificates Needed: _____

Is this a new course or speaker? _____ NO _____ YES* *If yes, see instructions below

5. Course Title: _____

Speaker: _____ SS # (last four): _____

Length of Instruction: 1hr _____ 2hr _____ Number of Certificates Needed: _____

Is this a new course or speaker? _____ NO _____ YES* *If yes, see instructions below

This form may be duplicated.

6. Course Title: _____
Speaker: _____ SS # (last four): _____
Length of Instruction: 1hr _____ 2hr _____ Number of Certificates Needed: _____
Is this a new course or speaker? _____ NO _____ YES* *If yes, see instructions below

7. Course Title: _____
Speaker: _____ SS # (last four): _____
Length of Instruction: 1hr _____ 2hr _____ Number of Certificates Needed: _____
Is this a new course or speaker? _____ NO _____ YES* *If yes, see instructions below

8. Course Title: _____
Speaker: _____ SS # (last four): _____
Length of Instruction: 1hr _____ 2hr _____ Number of Certificates Needed: _____
Is this a new course or speaker? _____ NO _____ YES* *If yes, see instructions below

9. Course Title: _____
Speaker: _____ SS # (last four): _____
Length of Instruction: 1hr _____ 2hr _____ Number of Certificates Needed: _____
Is this a new course or speaker? _____ NO _____ YES* *If yes, see instructions below

10. Course Title: _____
Speaker: _____ SS # (last four): _____
Length of Instruction: 1hr _____ 2hr _____ Number of Certificates Needed: _____
Is this a new course or speaker? _____ NO _____ YES* *If yes, see instructions below

* If a new course or speaker is not yet approved, submit a new course application or speaker application immediately

** If you run out of paper CECs, retain the names of attendees who did not receive one, and notify ABO-NCLE as soon as possible. DO NOT COPY CECs.

*** Keep a clearly printed sign-in roster of all attendees for each class on file for 3 years.

F - REQUEST FOR MASTER COURSE NUMBERS

Please check ABO or NCLE. (If you are requesting numbers for both ABO and NCLE, please use separate forms.)

American Board of Opticianry _____ National Contact Lens Examiners _____

1) Sponsoring Organization:

4) Sponsor representative to whom communications, master numbers will be e-mailed and invoice is to be mail to:

2) Program Location (city & state)

_____ Name

_____ Street Address (No P.O. Box please)

3) Program Date:

_____ City

_____ State

_____ Zip

_____ Daytime Phone

_____ email

Master number request must be received at least 2 weeks prior to meeting. Incomplete information will result in a delay or denial of master number distribution.

- * Master numbers are \$50.00 each and you will be invoiced.
- * This form can be e-mailed along with an excel spread sheet listing all courses and speakers to be presented or complete the reverse side of this application listing ALL courses and speakers to be presented. FOR EACH NEW COURSE AND/OR SPEAKER: please complete and attach the APPLICATION FOR NEW COURSE form and/or APPLICATION FOR NEW SPEAKER submit with the appropriate application fee for each application submitted.

Return all completed forms to:

ABO-NCLE

6506 Loisdale Road, Suite 330

Springfield, VA 22150

Phone: (703) 719-5800 or (800) 296-1379 for more information

Fax: (703) 719-9144

The ABO and the NCLE reserve the right to audit without charge or prior notice any program that has been awarded continuing education credit. The sponsoring organization agrees to comply with all ABO-NCLE regulations and procedures. I, the undersigned, also understand that failure to comply may result in denial of master numbers.

Signature of Meeting Sponsor

Date

1. Course Title: _____

Speaker: _____ SS # (last four): _____

Length of Instruction: 1hr _____ 2hr _____ Number of Certificates Needed: _____

Is this a new course or speaker? _____ NO _____ YES* *If yes, see instructions below

2. Course Title: _____

Speaker: _____ SS # (last four): _____

Length of Instruction: 1hr _____ 2hr _____ Number of Certificates Needed: _____

Is this a new course or speaker? _____ NO _____ YES* *If yes, see instructions below

3. Course Title: _____

Speaker: _____ SS # (last four): _____

Length of Instruction: 1hr _____ 2hr _____ Number of Certificates Needed: _____

Is this a new course or speaker? _____ NO _____ YES* *If yes, see instructions below

4. Course Title: _____

Speaker: _____ SS # (last four): _____

Length of Instruction: 1hr _____ 2hr _____ Number of Certificates Needed: _____

Is this a new course or speaker? _____ NO _____ YES* *If yes, see instructions below

5. Course Title: _____

Speaker: _____ SS # (last four): _____

Length of Instruction: 1hr _____ 2hr _____ Number of Certificates Needed: _____

Is this a new course or speaker? _____ NO _____ YES* *If yes, see instructions below

6. Course Title: _____

Speaker: _____ SS # (last four): _____

Length of Instruction: 1hr _____ 2hr _____ Number of Certificates Needed: _____

Is this a new course or speaker? _____ NO _____ YES* *If yes, see instructions below

* If a new course or speaker is not yet approved, submit a new course application or speaker application immediately

**Keep on file a clearly printed sign in roster for each class for 3 years.

G - Industry Speaker's Pledge to Keep Course Content Generic

(for Industry Vendors, Representatives, Owners, and Sponsored Speakers)

Name: _____

Company: _____

Job title: _____

By signing this pledge, I agree that course content will be presented in a generic and objective manner. I will not use my course to promote my company's products or services in any way.

Signature of Speaker

Date

