

Glossary of COPE Terms

ARBO

The Association of Regulatory Boards of Optometry (ARBO) is a 501(c)(3) not-for-profit association of regulatory boards of optometry. ARBO's mission is to represent and assist member licensing agencies in regulating the practice of optometry for the public welfare. ARBO created COPE in 1995 as a service to its member boards; COPE is entirely administered from ARBO's administrative offices.

Commercial Interest

A commercial interest is any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients. Providers of clinical service directly to patients are not considered commercial interest. A commercial interest is not eligible to become an approved COPE Administrator/Provider and cannot control the educational content for COPE Approved CE. Under this definition, the following types of organizations are eligible for become approved COPE Administrators/Providers and free to control the content of COPE Approved CE:

- 501C Non-profit organizations (Note: 501C organizations are screened for eligibility. Those that advocate for commercial interests as a 501C organization are not eligible to become COPE Approved Administrators/Providers. They cannot serve in the role of joint sponsor, but can be a commercial supporter.)
- Government organizations
- Non-health care related companies
- Liability insurance providers
- Health insurance providers
- Group optometric practices
- For-profit hospitals
- For-profit rehabilitation centers
- For-profit nursing homes
- Blood banks
- Diagnostic laboratories

Conflict of Interest

Circumstances create a conflict of interest when an individual has an opportunity to affect CE content about products or services of a commercial interest with which he/she has a financial relationship.

COPE considers 'CE content about products or services of a commercial interest' to include content about specific agents/devices, but not necessarily about the class of agents/devices, and not necessarily content about the whole disease class in which those agents/devices are used.

COPE

The Council on Optometric Practitioner Education (COPE), a member benefit and program of the Association of Regulatory Boards of Optometry (ARBO). The mission of COPE is to:

- accredit continuing optometric education courses on behalf of state boards on a national basis;
- reduce duplication of effort by state boards;

- create a uniform method of recording continuing education courses on a national basis;
- be the clearinghouse for information about continuing education programs and courses utilized by licensed optometrists to fulfill their continuing education requirements for license renewal; and
- encourage program sponsors to offer high quality CE in appropriate settings with adequate administrative structure

COPE Accredited CE

Continuing education activities that consist of COPE Qualified Courses produced and delivered by COPE Approved Administrators/Providers within COPE Qualified Events.

COPE Approved Administrator/Provider

The organization, group, or entity assuming overall responsibility for program planning, promotion, on-site administration, and financial management of CE events. CE Administrators/Providers must submit an application, agree to abide by COPE rules and regulations and meet specific requirements to become COPE Approved Administrators/Providers.

COPE Qualified Course

Courses meeting the requirements of COPE as determined by the COPE Reviewer Process. Qualification of courses is awarded for a term of three (3) years from the date the statement of qualification is issued by COPE. Renewal of Qualification must occur prior to the conclusion of the qualification period.

COPE Approved Event

Events produced by COPE Approved Administrators/Providers meeting the requirements of COPE as determined by the COPE Event Review Process. COPE Approved Events must be submitted for COPE Qualified Courses to be accredited by COPE.

Corporate Supporter

Any proprietary entity providing educational grants to CE Administrators/Providers.

Course

A structured, educational event specifically designed to impart new knowledge, shared experiences or factual evidence, which is used maintain the level of optometric competence consistent with the statutory requirements of a given state law defining optometry.

Course Category

Each *COPE Qualified Course* is categorized into a generalized content areas developed by COPE to meet the CE requirements for practitioner re-licensure of participating boards of optometry. The instructor, according to the major emphasis of the course content, categorizes each course; courses may be reallocated to a different content area by COPE during the review process, or at any point subsequent to its acceptance. All COPE Accredited Courses appearing in promotional materials or programs must carry the COPE logo, course ID#, course category and event ID#. The same information must also appear on the documentation provided to course attendees for boards of optometry to use when verifying CE credit for license renewal.

Course Demographics

Key course information critical to the categorization, processing, and review of a course submitted to COPE. Much of this information is entered into a database and is made available to state boards of optometry (attendance and course authentication), program administrators/providers (future program planning), and general practitioners (future CE program attendance planning).

Course Description

This is a brief statement of what the instructor(s) intends to present. It is a thumbnail sketch summarizing the course in 35 words or less, which is suitable for publishing.

Course Format

The method used to physically teach a course (i.e., Live, Video, Audio, DVD/CD-ROM, Satellite, Written, or Internet/Online).

Course Number

Each course is given a unique identification number when it becomes COPE Qualified. If the course is discontinued after Qualification for any reason, the number is not used for another course. The number consists of up to five digits followed by two letters, which indicates the content area for the course, i.e., 5344-PH, where 'PH' indicates the course content area as Pharmacology. When such a Qualified course becomes COPE Accredited, (i.e., it is being presented by a COPE Approved Administrator/Provider within a COPE Qualified Event), this number can be used in promotional materials (with the COPE symbol) for reference purposes. All documentation provided to a doctor for submission to a licensing board, such as a certificate of attendance slip, must include both the COPE Course and Event Numbers. This is necessary as state boards require the numbers when the course documentation is submitted to authenticate the course with COPE records; only then will states award CE credit for license renewal.

Course Outline

A Course Outline is a basic guide to the key learning elements contained in a course. Usually laid out in bullet format, a Course Outline should be in sufficient detail so as to permit either the participant or an observer the ability to clearly follow along throughout the presentation. An outline can be considered sufficiently detailed if an observer is able to enter the presentation and after 5 or 10 minutes be able to locate where in the outline the presenter is. As a rough guide, a 1-½ to 2 page outline is typical for a one-hour course.

Course Presentation

The method used to present the information in a course, (i.e., Lecture, Interactive/Workshop, Panel, Symposia/Scientific Lectures, Grand Rounds, Correspondence, Poster, or Internet/Online). More than one presentation method can be used in a course.

Credit Hour

One (1) hour of CE credit is based on 50 minutes of instructional time. COPE only accepts for review courses of at least one (1) in duration. Additional increments of credit are in 0.5 hours, where 0.5 hour of credit is based on 25 minutes of instructional time. For example, 1.5 hours of credit = a minimum of 75 minutes of instruction; 2.0 hours of credit = a minimum of 100 minutes of instruction, etc.

Curriculum Vitae

A CV is a detailed chronological history of a person's educational and teaching experience, and professional accomplishments which qualifies the instructor to teach the course (not a biographical sketch).

Event Number

Each event is given a unique identification number when it becomes COPE Qualified. If the event is discontinued after qualification for any reason, the number is not used for another course. All documentation provided to a doctor for submission to a licensing board, such as a certificate of attendance slip, must include both the COPE Course and Event Numbers.

Instructors

1. **Instructor**
The person (or persons) who actually teach the course, and who assumes responsibility for the educational content and method of presentation of the course.
2. **Principal Instructor.** The principal instructor is considered by COPE as the key individual identified with the course, and is the individual who submits the course material to COPE for review and receives all correspondence regarding its disposition.
3. **Co-Instructor.** A co-instructor is an individual who, in conjunction with a principal instructor, may assist and participate in the presentation of a course, but also has the necessary qualifications to give the course independently of the principal instructor should the principal instructor be unavailable due to extenuating circumstances.
4. **Adjunct Instructor.** An adjunct instructor is an individual whose main function is to support the principal instructor with the presentation or preparation of a course. An adjunct instructor may or may not be present to assist with the presentation of a course, however, an adjunct instructor cannot, under any circumstance, present a course in place, or in the absence of, the principal instructor.

Open Access

COPE Accredited CE must be open to all optometrists. COPE Approved Administrators must ensure this by the following:

- No efforts shall be made to exclude any learners.
- Commercial interests cannot invite or select learners, or generate invitation lists.
- Public notice of COPE Approved Events is required.
- If attendance is limited by space requirements, this must be included in all invitations and public notices, with a first come, first served policy.
- Non-members or affiliated parties of a COPE Approved Administrator/Provider must be able to attend the COPE Accredited CE event. Administrators/Providers may adjust the registration fees in a reasonable manner to accommodate them.

Relevant Financial Relationships

Financial relationships are those relationships in which the individual benefits by receiving a salary, royalty, intellectual property rights, consulting fee, honoraria, ownership interest (e.g. stocks, stock options or other ownership interest excluding diversified mutual funds), or other financial benefit. Financial benefits are usually associated with roles such as employment, management position, independent contractor (including contracted research), consulting, speaking and teaching, membership of advisory committees or review panels, board membership, and other activities from which remuneration is received or expected. COPE considers relationships of the person involved in the CE activity to include financial relationships of a spouse or partner.

With respect to personal financial relationships, 'contracted research' includes research funding where the institution gets the grant and manages the funds and the person is the principal or named investigator on the grant.

With respect to financial relationships with commercial interests, when a person divests themselves of a relationship it is immediately not relevant to conflicts of interest but it must be disclosed to the learners for 12 months.

Reviewer

A COPE recognized and state board-endorsed optometrist or faculty at optometric colleges who has volunteered to review courses for qualification and has completed the COPE Reviewer Training Modules successfully. Reviewers serve indefinitely and are not compensated for their service. Reviewers are required to examine in detail the course materials submitted to COPE, determine if it is in compliance with the *Criteria for Course Qualification*, and, where necessary, provide appropriate guidance for modification or adjustment.

Urgent Course Approval

The standard processing time for course processing is 30 days upon receipt at the COPE office. An additional fee is required for courses submitted under the 30-day requirement, with a request for urgent processing. In any event no course will be accepted with request for review in less than 10 days.