

THE GREENSHEET

Spring

2014

COPE Creates Specialized Task Forces

This year the COPE Committee has been divided into two task forces to divide up the work of the committee. One task force, led by Dr. Bob Smalling, is overseeing the operations side of COPE including course and event accreditation, investigating complaints, and updating COPE policies and procedures. Other members of the COPE Operations task force include: Dr. Doug Ayre, Dr. Tom Bobst, Dr. Dale Der-gousoff, and Dr. Larry Barger.

The second task force, led by Dr. Jill Martinson-Redekopp, is working on the development of the COPE Provider Model of Accreditation. The COPE Provider Accreditation task force also includes Dr. Jim Campbell, Dr. Michael O'Hara, and Dr. Jerry Richt. Each task force meets separately to work on their specific projects and reports back to the full COPE committee on their activities. Dr. Susy Yu is the Chair of the COPE Committee.

Dr. Ernest Schlabach, ARBO President, commented on the new configuration "We made a decision to divide up the workload this year. The COPE Committee had so much to do with maintaining our current

activity accreditation process, while also developing a new process for accrediting providers." Dr. Susy Yu, COPE Chair, added, "There will be a lot of changes to COPE this year. Our goal is to make sure that all COPE accredited CE promotes improvement in competence, performance and patient outcomes."

In addition to keeping up with the quarterly course audits and investigating complaints received through on-site reviews, the COPE Operations Task Force has been working on updating some of COPE's policies based on feedback received at the April 2013 National Optometric Continuing Education Conference (NOCEC). Some of the policies being addressed by the task force are: instructor qualifications, distance learning, and credit hours. The task force will be circulating recommendations for changes to ARBO's member boards for further discussion at the upcoming annual meeting.

The COPE Provider Accreditation Task Force is working on development of the provider accreditation process. Provider accreditation will be offered in addition to COPE's

existing activity accreditation and will most likely appeal to providers who present a large number of CE activities each year. The Provider accreditation process is being designed to be similar to the process used by the Accreditation Council on Continuing Medical Education (ACCME). Provider accreditation will allow more creativity and freedom within the educational planning process, but will also require greater documentation of the organization's overall processes.

For all COPE Accredited CE, there will be new accreditation criteria that will require documentation of educational practice gaps and measurement of CE outcomes for optometric continuing education activities. Provider accreditation will also enhance the opportunity for collaborative inter-professional CE activities and promote concurrent validity with other members of the CE community. The COPE Operations Task Force and the COPE Provider Accreditation Task Force will both be giving reports of their activities at the ARBO Annual Meeting in Philadelphia in June.



Association of Regulatory Boards of Optometry, Inc.

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A Letter from the President

Dr. W. Ernest Schlabach is the President of ARBO

I'd like to wish everyone a Happy New Year. I hope that 2014 is a productive and prosperous year for you. This year has started where 2013 left off, with a lot of activity! We have been working on development of the COPE Provider Model of Accreditation, enhancing the *OE TRACKER* mobile app, and planning our 95th Annual Meeting.

At the request of our members at the June 2013 meeting, I've been working to improve communication between ARBO and the AOA. After months of planning, I attended a meeting, along with two other ARBO Directors, in January between the AOA, ARBO, ASCO, and NBEO. We discussed many issues and all participants realized the value of and the need for better communication. The meeting reminded us all of why we need to work together. You can read more about the meeting later in this issue.

The *OE TRACKER* program continues to have incredible growth as more jurisdictions begin using the program to perform continuing education audits. The *OE TRACKER* mobile app has been used by many CE providers and has gotten great reviews. If you haven't had a chance to try it, please visit our website to learn more about the app and see how it can benefit your Board or State Association.

We hope you are able to send at least one representative from your Board to the Annual Meeting in Philadelphia on June 22-24, 2014. In an effort to assist our members in sending multiple delegates from each jurisdiction, we're offering a special registration rate this year. When you pay to register one delegate, you can register a second delegate at no charge. We have a lot of important issues to discuss this year. Look for more information on the Annual Meeting in this issue. Start making your plans now to attend!

Thanks again to the many volunteers and staff within ARBO who help to make our organization such a success. Your efforts this year have definitely made a difference and your contributions are greatly appreciated.



It has been my pleasure to serve as President of ARBO this year. Thank you for all of your support. If you have any questions or concerns about any of ARBO's programs, please feel free to email me at president@arbo.org, or contact the ARBO office at arbo@arbo.org. I look forward to seeing you in Philadelphia in June.

W. Ernest Schlabach, O.D.
ARBO President

New ARBO Website

ARBO launched a new and improved website in December 2013. The website was designed to be more user-friendly with easier navigation and drop-down menus. The improved functionality of the site will benefit all our customers including our Member Boards, CE providers/administrators, CE instructors, and optometrists.

If you haven't already seen the new site, check it out at www.arbo.org. Let us know what you think!

The screenshot shows the ARBO website homepage. At the top, there is a navigation menu with links for COPE, OE TRACKER, CELMO, MEETINGS, ABOUT ARBO, MEMBER RESOURCES, and INFO CENTER. Below the navigation is a large banner image of a woman wearing glasses, with the text: "To represent and assist member licensing agencies in regulating the practice of optometry for the public welfare". Below the banner is a "HOT LINKS" section with links to OE TRACKER, COPE Reviewer, COPE Administrator, ARBO Member Boards, and NEW OE TRACKER MOBILE APP. To the right of the hot links is a "Welcome" message and a "Mission Statement" section. Below these are sections for "OE TRACKER" and "COPE".



A Note from the Executive Director

Hello from the ARBO office. Spring is here and plans for our 95th Annual Meeting are well under way. Registration for the meeting is now open on our website. Hopefully, you're already working on your plans to travel to Philadelphia for the meeting. To help defray your costs to come to the meeting, we have travel stipends and scholarships available again this year. Check our website or see p. 4 for more information.

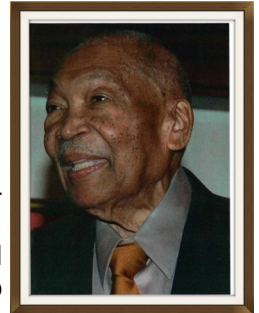
Our committees have been working hard since the last meeting. Plans for the COPE Provider Model of Accreditation are being finalized, and enhancements are being made to *OE TRACKER* to provide more features for our member boards and the individual optometrist. All the committees will be giving you an update on their activities at the Annual Meeting. I can't thank our dedicated volunteers enough for all that they do to help us in our mission of protecting the public. They are essential to this organization and we couldn't do everything we need to do without them.

Our staff has also been extremely busy as the spring CE activities start ramping up. COPE course submissions are at an all-time high and *OE TRACKER* was used for the first time at the end of 2013 by a number of Boards for their audit. Our *OE TRACKER* mobile app has been revised and it's now been used to submit attendance of almost 30,000 courses using smartphones.

I hope you've also had a chance to check out our new website. We've gotten a lot of positive comments about how great it looks. I'm really looking forward to seeing you all in Philadelphia this summer. If you have any questions or suggestions, please let me know.

Lisa Fennell
Executive Director

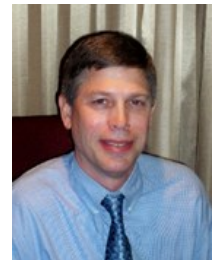
ARBO Remembers Past President



ARBO would like to extend condolences to the family of Dr. Henry R. Moore who passed away recently. Dr. Moore, who received his Optometry degree in 1946 from the Illinois College of Optometry, served as ARBO President from 1979-1980.

Dr. Moore was also a former National Optometric Association (NOA) President, Co-Founder of Plano Child Development Center in the Chicago area and served as a consultant to the Illinois Optometric Association. Dr. Moore is greatly appreciated for all of his contributions to the profession of Optometry. He will be missed by all.

Dr. Jerry Richt Elected to NBE Board of Directors



Jerry Richt, O.D., was elected to the National Board of Examiners in Optometry (NBE) Board of Directors in December 2013.

Dr. Richt has served on the ARBO Board of Directors since 2006 and was President of ARBO for the 2010-2011 term. He also previously served on the Tennessee Board of Optometry for 10 years and was Chairman of the Board for 2 years.

Dr. Richt is in private practice in Cleveland, Tennessee. Please join us in congratulating Dr. Richt!



Visit our Facebook page at:

<http://www.facebook.com/pages/Association-of-Regulatory-Boards-of-Optometry/127983077242338?ref=ts>

Register Now for the 95th ARBO Annual Meeting!

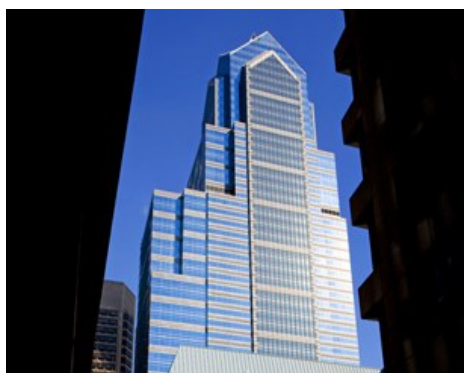
Meeting Information

ARBO's 2014 Annual Meeting will be held at The Westin Philadelphia on June 22-24, 2014. Members and staff of the Regulatory Boards of Optometry in the US, Canada and Australia are invited to attend this important meeting to discuss current regulatory issues. Please go http://www.arbo.org/2014_meet_new.php to find the meeting agenda and register for the event.

Register one delegate by May 2, 2014, at the full registration price of \$450, and you will be able to register a second delegate at no charge!

Topics that are going to be discussed at the meeting are: COPE Provider Accreditation, illegal uses of contact lenses, new learning modalities for continuing education, ICD-10, and more! There will also be Executive Director/Administrator breakout sessions, Board member training, reports from each jurisdiction on their activities over the past year, ARBO committee reports, and a discussion of contemporary issues affecting regulatory Boards.

You definitely won't want to miss this meeting!



*Register at
www.arbo.org
and reserve
your place at
the delegate
table!*

Hotel Information

Situated in Philadelphia's renowned Rittenhouse Square District, The Westin Philadelphia is just steps from upscale shopping, world-renowned restaurants and exciting attractions. You'll be able to relax and unwind within reach of the landmarks of America's early democracy, including the Liberty Bell, Independence Hall and the Constitution Center. The Westin is connected to The Shops at Liberty Place, offering more than 70 specialty stores and boutiques. The hotel is within walking distance to cultural and theatre districts, close to the historic area, 15 minutes from the airport, and five minutes from the Amtrak train station.

Hotel reservations can be made through the ARBO website or by calling 888-627-8153.

The Westin Philadelphia

99 South 17th St., Philadelphia, PA

Phone: (215) 563-1600

www.westin.com/philadelphia

Group Room Rate

\$269/night (plus taxes and fees)

You must make your room reservation before May 20, 2014 in order to receive the group rate.

Check-in and Check-out

- Check-in: 3:00 PM
- Check-out: 12:00 PM

In Room High-Speed Internet

Free for ARBO meeting attendees!

Parking

Valet parking, fee: 51 USD daily

Travel Assistance Available Again This Year!

If your Board has restricted travel allowances and you require additional support in order to attend, please let us know. ARBO and NBEO are jointly offering two financial support programs again this year:

\$500 Travel Stipend: Travel stipends will be available to one person from each jurisdiction who attends both the NBEO Workshop and the ARBO Annual Meeting. This stipend is available to those jurisdictions that REQUIRE parts I, II, TMOD or III of the National Board Exam. *To apply, or for more information, please contact Andrea Moss of the NBEO at 704.332.9565 or moss@optometry.org.*

\$500 Scholarships: Travel scholarships are also available again this year. A limited number of scholarships are available and they will be rewarded on a first come, first served basis (\$500 per jurisdiction). **Scholarships are only available to those delegates whose Board does not cover 100% of travel expenses.** *To apply, please send a request on your Board letterhead, noting that your Board does not pay 100% of your travel expenses, to Ron Cassel of ARBO at rcassel@arbo.org.*

Member Report Request

Each year, ARBO collects an annual report from all of its Member Licensing Boards for distribution at our Annual Meeting in June. The reports are distributed to all attendees, and each Board in attendance will also be asked to present to the House of Delegates on their current activities.

NEW THIS YEAR: Delegates at the Annual Meeting will be divided up by region for a breakout session to discuss the activities of each Board. Each regional group will then be given time to present their major activities to the entire House of Delegates and ask any questions of the other jurisdictions that they may have regarding regulatory issues. All delegates should come prepared with a report from their jurisdiction.

Please respond to the three questions below for discussion during the meeting:

1. How are your Board members appointed?
2. What is your Board's policy or rule for telemedicine regulation?
3. What is your Board's policy or rule on Board Certification?

In addition to the above, please provide the following information on your Board letterhead:

- Members of your Board, including any new appointments.
- Number of Board meetings held:
 - * Number of live meetings
 - * Number of conference calls
- Number of complaints registered and resolved in the preceding twelve months.
- Any continuing education audits conducted:
 - * Percentage of licensees audited
 - * Overall audit results
- Any new legislation enacted and corresponding actions taken by your Board.
- Any new rules/regulations enacted and date they became effective.
- Statistics and demographics including:
 - * Number of new licensees/registrants
 - * Total number of licensees/registrants practicing in your jurisdiction
 - * Number of DPA and TPA licensees.
- Fees charged for all levels of licensure:
 - * Initial licensure
 - * License renewal
- License renewal period (number of years).
- Board website
- Comments on activities of your Board, if any
- Identity of the individual preparing the report
- Any other information you would like to share with the ARBO House of Delegates.

Please submit your report in Microsoft Word or Adobe pdf to the ARBO office at the address above or by e-mail (lfennell@arbo.org) to arrive no later than **Monday, May 19, 2014**. This will allow us time to have them reproduced for distribution at the meeting. If you wish to see a sample report for reference, please contact Lisa Fennell, ARBO Executive Director.

**Join us for the ARBO 2014 Annual Meeting
June 22-24, 2014
The Westin Philadelphia**

OE TRACKER Committee Meets

The *OE TRACKER* Committee met January 18-19, 2014, in Charlotte, NC. During the meeting the Committee reviewed the most current *OE TRACKER* statistics, discussed member board use of *OE TRACKER* for auditing and license renewal and reviewed feedback from State Associations and other CE providers who are currently using the *OE TRACKER* mobile app.

Some of the Member Boards that have recently begun utilizing *OE TRACKER* include Colorado, Ohio, Maine, Minnesota and Arizona. ARBO representatives have also traveled to Hawaii and Washington to present information on how *OE TRACKER* can assist those Boards.

The Committee also made plans for phase II of the *OE TRACKER* mobile app, future program improvements and marketing plans for 2014.

Committee Members include Richard Orgain, O.D., Tennessee, Chair; Mary Lou French, O.D., Illinois; Carrie Hruza, O.D., Missouri; Richard Kniaziew, O.D., Ontario; Mona Maggio, California; Joseph Sullivan, O.D., Kansas; Jeff Yunker, O.D., North Dakota; Ernest Schlabach, O.D., Virginia, *Ex-Officio*; Lisa Fennell and Sierra Rice; Staff.

OE TRACKER

NBER Committee Meets

The National Board Examination Review (NBER) Committee attended the NBEO's Council Meetings in early December 2013 in Charlotte, North Carolina.

The committee members participated in reviewing the NBEO examinations to insure that questions and contents are appropriate to meet the needs of the ARBO member licensing boards. The commit-

tee members are working on a report which will be presented at the ARBO Annual Meeting in June 2014.

Members of the NBER Committee include: Joe Sullivan, OD; Mary Lou French, OD; Marla Moon, OD; Bob Smalling, OD; Greg Moore, OD, Board Liaison; and Ron Cassel, Staff.

COPE Committee Meets

The COPE Committee met the weekend of February 8-9, 2014, in Charlotte, NC. Over the weekend, committee members worked on finalizing the policies and procedures of the new Provider Accreditation process.

The committee also reviewed COPE's 2013 administrative statistics and discussed additions to the COPE course category list; and revisions to some of COPE's existing policies for instructor qualifications, distance learning, and credit hours.

Members of the committee also discussed the results of recent on-site reviews and complaints about COPE courses and events. The COPE

committee will present two reports at the ARBO Annual Meeting in June: an administrative report, and a report on the development of COPE's Provider Model of Accreditation.

COPE Committee Members include: Dr. Susy Yu, Chair; Dr. Doug Ayre; Dr. Larry Barger; Dr. Tom Bobst; Dr. Jim Campbell; Dr. Dale Dergousoff; Dr. Jill Martinson-Redekopp; Michael O'Hara, JD, PhD; Dr. Jerry Richt; Dr. Robert Smalling; Dr. Ernest Schlabach, Ex-officio; Ms. Donna DeLay, Staff; Ms. Lisa Fennell, Staff; Ms. Sierra Rice, Staff.



ARBO Southern Regional Meeting

The 2014 Southern Regional Meeting was held on March 15 in Atlanta, Georgia, in conjunction with SECO 2014. Representatives from 9 Boards of Optometry and 3 Optometry schools/colleges were in attendance.

Some of the topics that were discussed at the meeting were illegal sales of contact lenses, the new Kentucky Optometry school and telemedicine. The attendees were also given an update on the activities of ARBO's committees and plans for the upcoming annual meeting.



Attendees at the 2014 ARBO Southern Regional Meeting

ARBO was also given the opportunity to have a booth in the exhibit hall at SECO this year. ARBO staff members Donna DeLay and Sierra Rice spent their time in the booth answering questions about COPE and *OE TRACKER* and introducing optometrists to the *OE TRACKER* mobile app. It was a great opportunity to network and spread the word about ARBO's programs.



Donna DeLay; Dr. Ernest Schlabach, ARBO President; Sierra Rice; and Dr. Robert Smalling, Past President, in the ARBO booth at the SECO exhibit hall.

ARBO Leaders Meet With AOA, ASCO and NBEO

ARBO President Dr. Ernest Schlabach and Directors Dr. Gregory Moore and Michael O'Hara, JD, PhD met in January with leaders of the AOA, ASCO, and NBEO at a facilitated one-day meeting in Dallas, Texas. The meeting was held to help all four organizations come to a better understanding of each other's operating realities, vision for the future, and stakeholder requirements. The group also wanted to meet to work on improving inter-organization communications to help build a better working relationship between the organizations.

The goal of the meeting was to come to a common understanding of issues seen from the different stakeholders' perspectives. Some of the items discussed at the meeting were: organizational authority & responsibility; multi-organizational board membership; financial and organizational structures and alliances; maintenance of licensure; accreditation of continuing education; board certification & maintenance of certification.

Following the meeting, Dr. Schlabach commented, "I was asked by ARBO's Member Boards at our June

2013 Annual Meeting to work on improving communication with the AOA. I feel that this was a very productive first step in that direction. I'm encouraged that by opening up the lines of communication we can all work together for the benefit of the public and the profession." The group is looking to schedule another meeting in the fall.

Meeting Attendees from the other organizations were: Mitch Munson, O.D., AOA President; Chris Quinn, O.D., AOA Board of Trustees Member; William Reynolds, O.D., AOA Board of Trustees Member; David Heath, O.D., M.Ed., ASCO Immediate Past President; Richard Phillips, O.D., ASCO Secretary-Treasurer; Nancy Peterson-Klein, O.D., NBEO Immediate Past President; Jack Terry, O.D., Ph.D., NBEO Executive Director; Alan King, O.D., NBEO President. Jennifer Smythe, O.D., ASCO President, was also scheduled to attend the meeting but was unable to attend due to illness.



State Associations Utilizing *OE TRACKER* App

OE TRACKER is a program developed by ARBO to capture and store continuing education data for optometrists. Several State Boards have recently signed on to use *OE TRACKER*- Ohio, Minnesota, Maine, North Dakota and Colorado, to name a few. As more State Boards sign on, more State Associations have also begun to utilize *OE TRACKER*, especially the *OE TRACKER* mobile app for smart phones. To date, there have been more than 15,000 courses uploaded using the mobile app by the following state associations:

Alabama Optometric Association
 Nebraska Optometric Association
 Arkansas Optometric Association
 Oklahoma Association of Optometric Physicians
 Georgia Optometric Association
 Optometry Association of Louisiana
 Idaho Optometric Physicians
 Pennsylvania Optometric Association
 Iowa Optometric Association
 Tennessee Associations of Optometric Physicians
 Kansas Optometric Association
 Utah Optometric Association
 Michigan Optometric Association
 West Michigan Optometric Association
 Mississippi Optometric Association
 Wyoming Optometric Association, Inc.
 Missouri Optometric Association

Here is some of the feedback we've received from State Associations telling how useful *OE TRACKER* and the mobile app is:

"Pennsylvania began utilizing the ARBO Tracker System the year it was introduced. We believed that it would be advantageous for our members to have their continuing education credit information stored in a central location rather than having to collect continuing education slips from each program as we had been providing them. We began uploading our attendance via an excel spreadsheet for each CE program. Many of our local societies also use the system for their meetings. They send their attendee list, complete with Tracker numbers, to me and, as the Administrator; I upload each one via e-mail. Each year more of our locals use the system, with a few completing the Administrator process and submitting the information themselves. We find that, for our members in Pennsylvania, this system has simplified recordkeeping and our members know that they can find their information quickly if needed."- *Ilene K. Sauertieg, Director of Education for the Pennsylvania Optometric Association*

"The *OE Tracker* phone app has made our job of keeping up with attendance records a snap. Our attendees

are amazed that they get an immediate e-mail letting them know that their attendance has been recorded, and it takes pressure off of the staff and volunteers to make sure attendance is recorded. We simply put the QR code as the last slide of the presentation for people to scan and their attendance is uploaded instantly. For the few that don't have a device where they can do this, we can have someone at the door with their phone to enter in attendance." – *Vicki Farmer, Executive Director of the Arkansas Optometric Association*

"Things went fairly well for our first attempt at using the QR codes...it appeared we had between 40 – 50 of our 115 attendees use it. The feedback was very positive and they really liked getting the confirmation email within a minute or two of scanning."- *Gary Ellis, Executive Director of the Iowa Optometric Association*

"We have used *OE Tracker* since it was established. It has been a great tool for our members who choose to use it to keep track of their CE credits for license renewal. Our State Board of Examiners in Optometry downloads the information directly from ARBO, freeing our members from being forced to maintain paper records of their CE credits. When the *OE Tracker* App was introduced, we incorporated that into our CE verification process. Our members embraced the opportunity to use the app to record their CE credits and appreciated the near-instant verification that they received showing that the credit had been received by ARBO. We will continue to use *OE Tracker* and the *OE Tracker* App with our CE verification process to make the processing of CE verification as efficient as possible for our members and staff."- *Todd Fleischer, Associate Executive Director, Kansas Optometric Association*

If your State or Provincial Optometric Association is interested in using *OE TRACKER* and they have any questions or would like more information on how to utilize the mobile app, please ask them to contact ARBO at 866-869-6852 or 704-970-2710 or arbo@arbo.org.



The *OE TRACKER* app is available for iPhones and Android phones. Go to the app store on your iPhone or to Google Play on your Android phone.

2014 Annual Meeting Call for Nominations

In accordance with ARTICLE VI, Section 2.C of the Association of Regulatory Boards of Optometry (ARBO) Bylaws, I hereby announce that the Nominating Committee consists of the following individuals:

- Dr. Robert Smalling, Arkansas, Chair
- Dr. James Bureman, Missouri
- Dr. James Campbell, West Virginia
- Dr. Jeffrey Yunker, North Dakota
- Dr. Michael Ohlson, Iowa, Board Liaison
- Dr. Ernest Schlabach, Virginia, *Ex-officio*

I also announce that two positions will be open on the ARBO Board of Directors this year. Elections will be held at the ARBO Annual Meeting in June:

- One 4-year term – Dr. Jerry Richt: Not eligible for re-election
- One 4-year term – Dr. Gregory Moore: Eligible for re-election; intending to run

Individuals wishing to be considered by the Nominating Committee for service on the ARBO Board of Directors shall send a statement to that effect, along with a current CV, to Ms. Lisa Fennell, Executive Director, at the ARBO office by June 1, 2014. The candidate should be available at the ARBO Annual Meeting for an interview by the Nominating Committee.

For more information, see ARTICLE V, Section 1 of the Bylaws, on the ARBO Website at www.arbo.org.

Susy Yu, OD, MBA
ARBO Secretary-Treasurer

OFFICERS

President—*W. Ernest Schlabach, O.D.*
Vice President—*Roger Pabst, O.D.*
Secretary-Treasurer—*Susy Yu, O.D.*
Immediate Past President—*Michael W. Ohlson, O.D.*

DIRECTORS

Gregory Moore, O.D.
Michael J. O'Hara, J.D., PhD.
William Rafferty, O.D.
Jerry Richt, O.D.

STAFF

Lisa Fennell, *Executive Director*
Ron Cassel, *Operations/Finance Manager*
Candice Cole, *Program Coordinator*
Donna DeLay, *Program Coordinator/COPE Administrator*
Tony Mancuso, *Database Administrator/Web Developer*
Sierra Rice, *Program Manager*



ARBO
200 South College Street
Suite 2030
Charlotte, NC 28202
Phone: 704-970-2710
Fax: 704-970-2720
Email: arbo@arbo.org
www.arbo.org