COPE Reviewer Manual

Revised March 2017

Includes: COPE Accreditation Criteria and Standards for Commercial Support: Standards to Ensure Independence in CE Activities
Dear COPE Reviewer:

The Council on Optometric Practitioner Education (COPE) Committee would like to thank you for volunteering to serve as a COPE Reviewer. Qualified volunteers such as you are essential for the fulfillment of the missions of both COPE and ARBO. Your efforts will benefit optometric licensing boards, optometric colleagues, continuing education providers, and most importantly, the public.

This manual contains the guidelines and procedures necessary to review courses. Please read it carefully. We suggest you print it and keep it handy as a reference during reviews. Most course reviews will be straightforward. However, in complex cases, you may have to refer to the manual to help you arrive at a fair and standardized decision.

In an ongoing effort to ensure that all volunteers review courses in a uniform and standardized manner, COPE has instituted an online certification process for all reviewers. This online process consists of six 15- to 20-minute self-paced education modules followed by a short self-assessment. Upon successful completion, you will be issued a certificate and a lapel pin indicating your status as a COPE reviewer.

For existing reviewers, COPE may occasionally request you go online and recertify, if there have been significant changes in the guidelines or procedures. For newly appointed reviewers, COPE will require you to complete the online certification process before issuing you courses to review.

Should you need further information about COPE, or if you need assistance as you review courses, please call the ARBO office at (704) 970-2710 or (866) 869-6852 or send an email to arbo@arbo.org.

Sincerely,

The Council on Optometric Practitioner Education
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WHAT IS COPE®?

Optometric continuing education (CE) is the primary method used by optometric regulatory boards to promote the continuing competence of licensed optometrists. The Council on Optometric Practitioner Education (COPE®) was created by the Association of Regulatory Boards of Optometry (ARBO®) to accredit continuing education on behalf of optometric licensing boards. At least 52 licensing boards currently accept COPE accredited courses toward maintenance of licensure. COPE utilizes standardized accreditation processes based on criteria referenced standards to fulfill its mission.

COPE's Mission is: To assist member boards in the accreditation of optometric continuing education.

COPE's Objectives are:
- To accredit optometric continuing education providers and activities for the public welfare;
- To monitor programs to help assure the quality and independence of continuing education in appropriate settings with adequate administration;
- To reduce duplication of effort by member boards;
- To create a uniform method of recording continuing education activities;
- To be the reference source for member boards for information about continuing education providers and activities utilized by licensed optometrists to fulfill their continuing education requirements.

COPE STANDARD FOR COMMERCIAL SUPPORT OVERVIEW

COPE has adopted the ACCME Standards for Commercial Support (SCS) of continuing education. Instructors and Administrators/Providers of COPE-Accredited CE must agree to abide by the following standards regarding commercial support. (See the full standards on pages 37-40.)

1. COPE-Accredited CE must be identified, developed and presented free from the control of a commercial interest.
2. Every person in a position to impact the content of COPE-Accredited CE must disclose all relevant financial relationships to the COPE Administrator or Provider and to the learners.
3. In order for a CE activity/event to be COPE accredited, all commercial support must be in the form of an educational grant to the COPE Administrator or Provider documented by a signed agreement between the COPE Administrator or Provider and corporate supporter.
4. There must be a clear separation of any type of product, service, and instrument or device promotion with COPE- Accredited Courses. These activities, such as commercial exhibits and advertisements must be physically separated from and not interfere with COPE-Accredited Courses.
5. COPE-Accredited Courses cannot deliver specific proprietary business interests and must give balanced coverage to treatment options.
6. To maintain transparency, financial relationships with commercial interests of any persons in a position to impact or control the educational content must be disclosed to the learners. This includes instructors and planning committee members.
COPE REVIEWER INSTRUCTIONS

Please review all of the information contained in this booklet before you begin reviewing courses. IMPORTANT: The course application review process is anonymous. The reviewer of any specific application for course qualification is never identified to the instructor or submitter of the application.

If you need help at any time during your review, do not hesitate to contact ARBO at 866-869-6852 or 704-970-2710. If necessary, the ARBO staff will have a COPE Committee member contact you. It is better to clarify something early in the process, rather than face a problem later on. Please remember to be aware of the timeline issued. Your involvement and your willingness to review the courses in the time allotted are critical to our success. A link to the online Course Evaluation Form to use for your review will be sent to you with the course. See pages 10-12 for a sample Course Evaluation Form.

Please apply the information in this handbook and follow the steps below for all courses to assure a standardized approach to course review. It is critical that all reviewers carry out the review of courses in the same manner. You are part of a team, and how you review a course must be the same process used by all other reviewers. This standardized system will give confidence to instructors that their courses are being reviewed in a uniform manner, without regard to how well known they are, or specific regard to experience and qualifications that do not directly relate to the course being reviewed. Also, it is important to review courses submitted by instructors you know well by reputation as thoroughly as you might review a course from an instructor whose name you do not recognize. All courses must be treated equally.

REVIEW STEPS:
1. Set a timetable. You will be given a deadline. On the day that you get the course(s) for review, please determine if you will be able to meet the deadline given. IF YOU WILL NOT be able to meet the deadline, please contact ARBO immediately and the course(s) will be reassigned.

2. Review the course criteria. Make sure that you are thoroughly familiar with the Requirements for Course Qualification. Before beginning to review a course, read over the requirements on page 15-16 of this handbook.

3. Application. Make sure that the application is complete, and an appropriately detailed course outline (or slides) and Curriculum Vitae (CV) are attached. If any item is missing, contact ARBO immediately. See pages 13-14 for a sample course outline.

CURRICULUM VITAE (CV)
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). The minimum information that must be provided should include:

- Name
- Office/work address and phone number
- Education (degree/certification, institution, year degree awarded)
- Professional experience (appointments, publications, area(s) of expertise, prior lectures)
- Professional affiliations/societies
- Optometric/medical licensure information from the jurisdictions where the instructor holds a current license to practice
4. **Complete the Course Evaluation.** It is important that you answer ALL items. If you answer NO to any item (or yes to item 4), the course will not be qualified. Consequently, it is critical that you complete the comments section, stating concisely your reason for your judgment. If you believe that your NO course can be changed to YES if more information were made available to you, please contact ARBO immediately. The staff will attempt to contact the principal instructor on your behalf to obtain this information.

5. **When there is a problem with a course.** You can provisionally accept a course in the following instances:
   - If you are unable to open any of the course attachments the course should be marked provisional and the necessary documents should be requested through the ARBO staff.
   - You feel the course is not categorized properly. Please use the descriptions of course categories on pages 17-19 to re-categorize the course. The categorization of a course is CRITICAL to optometry licensing boards and having the correct category is the responsibility of the reviewer.
   - If the outline is insufficient for you to understand what will be presented, the course should be marked provisional pending a more complete outline. Please keep the course on hand and request, through the ARBO staff, a better outline to complete the review.
   - The time allotted for the material to be covered is significantly too long or too little. This is especially important with distance learning courses. You will need to time yourself as if you were taking the course. If there is not enough time allotted or too much time allotted, the course should be marked provisional pending revision.
   - If you receive a course that you are not qualified to review because you do not have the expertise or are not comfortable reviewing, please request the ARBO staff to forward it to a more appropriate reviewer.

6. **When to reject a course.** If you’re unsure whether to reject a course or mark it provisional, a good rule of thumb is: If the course can be approved with minor adjustments (better outline, change category, adjunct vs. co-instructor, etc.), mark it “Provisional” and include remarks about what needs to be changed. On the other hand, if the content is just not appropriate for COPE-qualified continuing education, mark it “Rejected.”

7. **Report your decisions.** Review the online Course Evaluation Form one more time to be sure that everything is complete and all questions have been answered. Then digitally sign the form and click on “Notify ARBO of My Decision”. Please contact ARBO immediately if you have any problems with your submission.

8. **Keep all materials for a week.** Following your review, please keep all course reviews on hand for one week after which time you can properly dispose of the courses.

9. **Conflict of Interest.** If you receive a request to review a course with which you have a direct connection, i.e. have a proprietary interest, provide a for-profit support, contributed substantially to the course content, or feel that your personal knowledge of the instructor(s) may bias your review, please contact ARBO IMMEDIATELY and request a reassignment of the course to another reviewer.
REJECTED COURSES—APPEALS PROCESS

The appeal process for COPE course review is as follows:

1. A course is rejected.
2. The instructor is notified and given the reviewer comments (name not given) as to the nature of the rejection.
3. The instructor has the option to request a second review.
4. If a second review is requested, the course is sent to an additional reviewer.
5. If the course is rejected again, the course is sent to the COPE committee for a final decision.
6. If the COPE committee rejects a course, the decision is final and the instructor is encouraged to submit the course directly to the Board of Optometry in the jurisdiction where the course will be presented.

COURSE APPLICATION INSTRUCTIONS

Course Application Instructions Instructors Must Follow

1. The following are COPE guidelines given to instructors when they submit a course for COPE Qualification. A minimum of 4 weeks must be allowed for the review process.

   A. **Submitter Information:** A COPE Administrator or Provider may submit the course on behalf of the instructor and the submitter must upload a dated and signed statement from the instructor acknowledging submission on his or her behalf when submitting the course. Under no circumstances can any employee or consultant of a commercial interest submit a course for COPE accreditation. The submitter will receive email notifications as the application moves through the process.

   B. List the Principal Instructor, address, phone number and email address so that ARBO can contact the Principal Instructor with questions concerning this application. Notification of action on this application will be sent to the Principal Instructor.

   C. List the names and degrees of any Co-Instructors who participate in the presentation of the course. A Co-Instructor is an individual who, in conjunction with a Primary Instructor, may assist and participate in the presentation of a course, but also has the necessary qualifications to give the course independently of the Primary Instructor should the Primary Instructor be unavailable.

   **IMPORTANT:** Instructors must file for independent COPE Qualification for a course that may, or is desired to be, presented separately by both the Primary and Co-Instructor.

   D. List the names and degrees of any Adjunct/Assistant Instructors who participate in the presentation of the course. An Adjunct Instructor is an individual whose main function is to support the Primary 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 Primary Instructor.
E. The title must adequately describe the course. It is not recommended that dates be used in the course title. The title must be as it will appear in all future programs.

F. List the total instructional hours of the course.
   1. To be qualified, the minimum credit for any COPE-Qualified Course is 0.25 hours/units.
   2. COPE hours/units are defined in the following increments:
      • 0.25 hours/units of credit equals a minimum of 15 minutes of instructional time.
      • 0.50 hours/units of credit equals a minimum of 25 minutes of instructional time.
      • 1.00 hours/units of credit equals a minimum of 50 minutes of instructional time.

2. **Course Description**
   This is a brief statement of what the instructor(s) intends to present. It is a thumbnail sketch summarizing the course which is suitable for publishing.

3. **Disclosure of Financial/Proprietary Interests**
   The instructor(s) must disclose on the application any direct financial or proprietary interests they may have in any of the companies, products, pharmaceuticals or services they may have mentioned, or intend to mention, in their presentation. As a reviewer, you are expected to assess whether such support inappropriately influences the course material.

   **Examples of the influence of proprietary interests include:**
   • the absence of unbiased evidence equally assessing similar products or services;
   • the exclusion of other products or services that might reasonably be expected to produce equivalent or similar results, or
   • the inference of the superiority of the proprietary product or service over others.

   The Instructor must also disclose if they provide for-profit support of any kind, are a paid consultant to, an employee of, or serve as an officer on the board of companies mentioned in their presentation. Should the course be approved, this information must also be disclosed at the beginning of the presentation to the audience in a clear and unambiguous manner, both verbally, and be included in the written course handout/outline.

4. **Course Categories**
   While a course may pertain to several course categories, there is usually one major topic which will cover most of the time and discussion and which will best match one of the categories. The Instructor should identify **one** category which best describes the educational experience provided by their course.

5. **Course Presentation**
   The presentation indicates how the course material will be presented. Courses may be presented by more than one method. Indicate the amount of time that will be allotted for each method during the course. Use decimal format. The time allotments for all methods should total the entire number of hours in the course. Refer to definitions on page 19 for clarification.

   Distance Learning/Multimedia courses require a post-course test to verify learning. As with CEE courses, a statement from the test-sponsoring institution must accompany the course application. See page 21 for COPE's Distance Learning/Multimedia Policy.
6. **Continuing Education with Examination (CEE)** (Previously Transcript Quality (TQ) or Institutional Certified education.) If the course will be eligible for CEE credit, there must be a statement from the test-sponsoring institution, certifying that the institution will assume responsibility for the related assessment, and will provide each participant with documentation of performance, with the name and address of the institution prominently identified. The post-course test and answer key must be enclosed with the application.

7. **Distance Learning/Multimedia**
A course qualifies as Distance Learning/Multimedia if it is presented in any of the following formats:

   - **Interactive Distance Learning**
     Examples: Webinar, video conference, teleconference, or other format that allows for immediate interaction and feedback between audience and instructor. Once the event has taken place, learners may no longer participate in that activity.

   - **Enduring Distance Learning**
     Examples: Webcast, podcast, video, journal, website, written or other format that provides one-way content to the audience without immediate interaction with the instructor. There is not just one time on one day to participate in the activity, rather, the participant determines when he/she participates.

8. **Course Format**
The format indicates how the course will be taught. You are allowed only one choice of format for the course. Most courses are “live”. Refer to the Course Format definitions on page 20 for clarification.
COURSE EVALUATION

A link to the online Course Evaluation Form will be emailed to you with the course. To begin your evaluation click on the link. You will also be given a review deadline date. If you cannot complete the review in the time requested, please let the ARBO staff know immediately.

Sample Course Evaluation Form

This online form must be complete when submitted to ARBO. All questions must be answered. Please note that for some questions a comment must be made justifying your decision. If you need additional information that could possibly change a NO to a YES, please call ARBO at (704)970-2710 and the staff will contact the instructor for this material on your behalf. (Note: do not contact the instructor yourself.)

**Course ID:** TBA  
**Principal Instructor’s Name:** Jane Doe, OD  
**Course Title:** Benefits of contact lenses for children  
**Reviewer’s Name:** John Smith, OD

**FOR EACH QUESTION CHOOSE ‘YES’ OR ‘NO’ AS YOUR ANSWER. IF ‘NO,’ IT IS ESSENTIAL THAT YOU COMMENT AND JUSTIFY YOUR DECISION.**

1. **Does this course contribute to the advancement and enhancement of professional competency and scientific knowledge in the practice of optometry, and reflect the educational needs of optometrists?**  
   - [ ] YES  
   - [ ] NO  
   Comment: (required if NO)

2. **Does the course have scientific and educational integrity and contain customary and generally accepted optometric and medical practices?**  
   - [ ] YES  
   - [ ] NO  
   Comment: (required if NO)

3. **Does the course outline demonstrate consistency with the course description and reflect the course content?**  
   - [ ] YES  
   - [ ] NO  
   Comment: (required if NO)

4. **Will the applicant’s disclosure of financial/proprietary interests inappropriately bias the learning experience?**  
   - [ ] YES  
   - [ ] NO  
   Comment: (required if YES)
5. Does the course description match the course category selected? If NO, provide the appropriate category for which the majority of the course content corresponds to COPE's category descriptions.

☐ YES ☐ NO
This course is currently categorized as: ________
Comment: (required if NO)

6. Is the request for course credit hours appropriate to the material and scope of the course?

☐ YES ☐ NO
If not, provide your estimate of the appropriate credit hours for this course.
Comment: (required if NO)

7. Is the course presentation (see definitions) appropriate to the subject matter?

☐ YES ☐ NO
Comment: (required if NO)

8. Is the course format (see definitions) listed accurately when compared with the definitions?

☐ YES ☐ NO
Comment: (required if NO)

9. Does the Curriculum Vitae (CV) substantiate the principal instructor's qualifications to teach the course? (Give consideration to advanced experience, education and training, past experience teaching subject area, etc.)

☐ YES ☐ NO
Comment: (required if NO)

Post-Course Testing For both Continuing Education with Examination (CEE) and Distance Learning/Multimedia courses, the following must apply: (CEE was previously referred to as "Transcript Quality (TQ)" or "Institutional Certified" CE)

10. Is there documentation from a school of optometry, medicine, or pharmacy, indicating its responsibility to score and grade the post-course test or ensure the administration and grading of the test is unbiased, if they are not grading the test themselves?

☐ YES ☐ NO

11. Is the post-course test in multiple-choice question format?

☐ YES ☐ NO

12. Did the test include at least a minimum of 3 questions for a 0.25 hour course, 5 questions for a 0.50 hour course or 10 questions for a 1.00 hour course, rounded up for partial duration? (i.e., a 2.5 hour course must provide 30 test questions)
13. Did the instructor avoid making any reference to test questions in the course outline?
   
   YES  NO

14. Did the item distribution (test questions) match the relative emphases of the course outline? (i.e., did test questions address the most important areas covered in the course outline)
   
   YES  NO

15. Continuing Education with Examination (CEE) only: Is the course at least 2 hours in duration?
   
   YES  NO
   Comment: (required if NO)

Final Course Disposition

16. Course:  ACCEPTED  REJECTED  PROVISIONAL ACCEPTANCE
   (comment below)

   General comments (only for issues of significance that could not be included in other comment fields):

   Reviewer’s Digital Signature: 

   Your review will be time stamped to indicate the date/time it was submitted.

   NOTIFY ARBO OF MY DECISION
SAMPLE COPE COURSE OUTLINE

PRESCRIBING DISTANCE TELESCOPES FOR LOW VISION PATIENTS
IN YOUR PRIMARY CARE PRACTICE

Jane Doe, O.D.
123 Main Street
Someplace City, CA 95959
(700) 555-1212
lowvisiondoctor@123key.com

Course Outline

I. Who can benefit from telescopic devices?
   A. Distance tasks (primary use)
      1. Seeing the chalkboard
      2. Overhead menus at fast food restaurants
      3. Bus signs
      4. Identification of individuals at a distance
      5. Watching plays, movies
      6. Seeing television
   B. Intermediate tasks (secondary use)
      1. Computer use
      2. Arm’s length tasks, e.g. card playing
      3. Seeing countertops

II. Types of simple telescopes
   A. Galilean systems
      1. Galilean telescopes have positive lens as the objective and a negative lens of higher
         power as the ocular.
      2. Erect and upright image
      3. Relatively compact design
      4. Dim images and limited field-of-view
      5. Large exit pupil, which makes centering less difficult.
      6. Rejection of this visual aid is attributed mainly to its appearance.
   B. Keplerian systems
      1. Keplerian telescopes have a plus power objective lens and a plus power ocular lens
      2. Inverted images require an erecting lens or prism
      3. Typically larger dimension of the device and increased weight.
      4. Brighter images and wider fields of view
      5. Small exit pupil requiring better centering and aiming
      6. Greater design complexity and more expensive
      7. Size and weight can be reduced with in-the-lens design
      8. Rejection of this visual aid is also attributed mainly to its appearance.

III. Properties of telescopes
   A. The exit pupil and field of view
   B. The exit pupil and brightness
   C. Determination of the telescope type
   D. Verification of telescopic magnification (exit pupil method)

IV. Prescribing for distance tasks
A. Determination of proper magnification for specified distance task
B. Monocular vs. binocular

V. Instruction in the use of telescopic systems for distance tasks
A. Stationary user and stationary object (spotting)
B. Stationary user and moving object (tracking)
C. Moving user and stationary object
D. Moving user and moving target

VI. Case studies
A. A 14 year old male with albinism has nystagmus, is light sensitive and currently wears single vision distance glasses, which he reports only “help a bit.” He cannot read the notes on the blackboard at school. Your refraction is:
   R. +4.00 − 2.25 x 180 VA 10/80 L. +3.00 − 3.00 x 170 VA 10/80
   He does not want to wear “anything that sticks out of his glasses.” He likes to watch soccer matches at the stadium also.
   1. What specific tasks does the patient want to do?
   2. What are the best corrected acuities?
   3. What magnification should you start with?
   4. How will the nystagmus affect the use of the telescope?
   5. Should he wear his glasses when using the telescope?
   6. How will wearing his glasses affect his field of view?
   7. What options are available?
   8. What about his light sensitivity?

B. A 56 year old retired medical laboratory technician was diagnosed with beginning macular degeneration 7 years ago. She likes to play keno at the casinos but finds it very difficult to see the numbers on the overhead keno boards. She does not wear any glasses for distance and her acuities are: R. 10/40; L. 10/80.
   1. What is the task which needs to be accomplished?
   2. What are her acuities?
   3. How will the light in the surrounding area affect the selection of the scope?

C. A 65 year old African American woman with glaucoma has a hard time seeing concerts from her seat in the theater. Best correction and acuities are:
   R. +1.00-0.50x095 VA 10/160 L. +0.50-0.50x080 VA 10/200
   She has found her 2x opera glasses to be inadequate.
   1. Can you help her with this level of vision?
   2. How would her glaucoma medications affect her using a telescope?
   3. What is the disadvantage of giving her a high powered system?

D. A 69 year old man with significant cataracts does not want to have cataract surgery. He loves to fly radio controlled model airplanes but is finding it extremely difficult to see the planes in the air. His acuities are not improved with any standard correction. R. 20/100; L. 20/100
   1. Does the patient need his hands free?
   2. One eye or two?
   3. How will a higher powered system affect his ability to track the planes?

E. A friend (with no visual impairment) wants to see his son play football. Many of the games are played at night, but several are during the day as well. He has seen ads for binoculars and is trying to decide whether he should buy a 4x12 binocular; a 6x15 binocular; a 7x50 binocular or a 10x20 “extra wide field” system. Can you give him any advice?
COPE REQUIREMENTS FOR COURSE QUALIFICATION

I. Courses
   A. A course must be an organized program of learning that will contribute to the advancement and enhancement of professional competency and scientific knowledge in the practice of optometry, and be designed to reflect the educational needs of optometrists.
   B. A course must have scientific and educational integrity and must contain customary and generally accepted optometric and medical practices.
   C. A course must have an outline which demonstrates consistency with the course description and reflects the course content (see page 33 for guidelines.)
   D. A course handout/outline must be provided to all participants. The outline must be the same as the one submitted for COPE accreditation. If the original outline is updated, a copy must be provided to both ARBO and the event administrator/provider.
   E. A course must be taught in a manner appropriate to the educational content, objectives and purpose of the program, and must allow suitable time to be effectively presented to the audience.
   F. Disclosure of financial/proprietary interests:
      1. Everyone in a position to impact the content of the CE must disclose any financial interest or other relationship with a manufacturer, vendor, or distributor of any commercial products or services related to the practice of optometry.
      2. Courses presented on behalf of a commercial/proprietary entity, which specifically promotes one or more products of that company, will not accredited by COPE.
      3. Commercial/proprietary entities must have no influence or control over course development or presentation.
   G. Courses cannot be retroactively qualified/accredited by COPE.

II. Instructional Hours
   A. The minimum credit for any COPE-Qualified Course is 0.25 hours/units.
   B. COPE hours/units are defined in the following increments:
      • 0.25 hours/units of credit equals a minimum of 15 minutes of instructional time.
      • 0.50 hours/units of credit equals a minimum of 25 minutes of instructional time.
      • 1.00 hours/units of credit equals a minimum of 50 minutes of instructional time.

III. Instructor(s)
   A. Instructor(s) must have the necessary qualifications to present the course as evidenced by a doctorate-level degree (OD, MD, PhD, DO, JD, DDS, DC, PharmD, LLD, DEd, DS, etc.) or expertise gained through training or experience.
   B. All instructors, including adjunct/assistant instructors, must provide a current Curriculum Vita (CV.) The CV must provide clear evidence that the instructor is qualified to teach the course. (NOT a biographical sketch.)
      • The minimum information that must be provided on the CV includes:
         o Name
         o Office/work address, phone and fax numbers
         o Education (degree/certification, institution, year degree awarded)
         o Professional accomplishments/experience (appointments, publications, area(s) of expertise, prior lectures)
         o Professional affiliations/societies
         o Optometric/medical licensure information from the jurisdictions where the instructor holds a current license to practice
C. The Instructor should submit the course information to COPE. A COPE Administrator/Provider may submit the course on behalf of the instructor, but the instructor must acknowledge the submission (see sample instructor acknowledgement below.) Under no circumstances can any company with a commercial interest submit a course for COPE accreditation.

D. All payments and reimbursements to the instructor must come directly from the COPE Administrator/Provider. Commercial Supporters cannot supplement nor provide any financial incentives to speak on COPE Accredited Courses.

E. Under no circumstances can an Instructor serve as both the Instructor and Administrator/Provider for a COPE Accredited CE Activity at the same time.

F. Instructors should not seek COPE accreditation if the presentation is for the purpose of promoting products, services, instruments or devices.

G. Instructors will assure educational materials such as slides, abstracts and outlines will not include any advertising or product group message. Instructors will ensure balanced and transparent coverage of therapeutic and treatment options, and must disclose off-label or experimental information.

H. Instructors may have assistance in the development of a course, including the creation of handouts, slides and objectives, though not from a commercial interest.

I. Instructors will disclose all relevant financial relationships with any commercial interest when submitting courses for COPE accreditation. Should no relevant financial relationships exist, this must also be disclosed.

J. Instructors will include a disclosure slide at the beginning of each presentation disclosing:

   (see page 25 for sample disclosure statements.)

   1. That the instructor developed the course material and information independently or if the instructor had assistance. The disclosure must include who provided the assistance.

   2. The instructor developed the course material independent from any influence of commercial interest.

   3. Any personal conflicts of interest have been resolved.

   4. Any financial relationship with a commercial interest. Should no relevant financial relationships exist, this must also be disclosed.
COPE COURSE CATEGORY DEFINITIONS

The following are the specific definitions of the individual course categories:

A. CLINICAL OPTOMETRY

**Contact Lenses (CL):** All aspects of contact lens applications.

**Functional Vision/Pediatrics (FV):** Those portions of optometric practice that deal with visual processing and neuro-optometric rehabilitation, including sports vision, binocular vision, and visual training or vision development courses.

**General Optometry (GO):** Any study in the area of the eye and vision care, which constitutes eye and vision research, or examination, diagnosis and treatment of anomalies of the human eye and visual system. For the purposes of these categories “General Optometry” excludes any other category enumerated here.

**Low Vision/Vision Impairment & Rehabilitation (LV):** All aspects of low vision devices, care and therapy.

**Public Health (PB):** Those portions of optometry focused on disease prevention and health promotion at a population level and considering evidence from the fields of biostatistics, environmental health, health policy and management of social and behavioral sciences.

**Examples:** Disease surveillance, vision screening, health disparities, determinants of health, health literacy, health education, environmental optometry, infection control, health services research, health law, health economics, evidence based practice, behavior change communication, cultural competency, etc.

B. OCULAR DISEASE

**Glaucoma (GL):** The study of the etiology, clinical pathophysiology, diagnosis, treatment, management, and the outcomes of therapeutic regimens.

**Examples:** Any course with major emphasis on diagnosis, treatment, and/or surgical and medical management of glaucoma (i.e., trabeculectomy, laser surgery for glaucoma).

**Injection Skills (IS):** Instruction and clinical training in subcutaneous, intra-muscular, and intravenous injection for the purpose of therapeutic diagnosis and treatment of disease or anaphylaxis.

**Laser Procedures (LP):** The study and clinical training in the performance of any ophthalmic laser procedure of the anterior segment and adnexa.

**Examples:** SLT, ALT, LPI, YAG, Punctoplasty, etc.

**Peri-Operative Management of Ophthalmic Surgery (PO):** The study of all aspects of pre- and post-operative management of invasive ophthalmic surgery procedures (excludes Refractive Surgery).

**Examples:** Cataract surgery, blepharoplasty, strabismus surgery, keratoplasty, etc.

**Refractive Surgery Management (RS):** Instruction and/or clinical training in refractive or photorefractive technologies, which may include Perioperative Patient Management: Counseling and evaluation for indications or contraindications in patient selection, including recognition of associated complications and course of action in analysis and treatment.
Examples: Courses related specifically to management of PRK, RK and LASIK patients; corneal refractive surgery, etc.

Surgery Procedures (Optometric) (SP): Instruction and/or clinical training in the performance of ocular surgery procedures.
Examples: I&D of lesions, surgical lid lesion excision, suturing techniques, stromal micropuncture, chalazion curettage, etc.

Treatment & Management of Ocular Disease: Anterior Segment (AS): The study of the etiology, clinical pathophysiology, diagnosis, treatment, management, and outcomes of therapeutic regimens for anomalies of the anterior segment of the human eye.
Examples: Keratitis, anterior uveitis, conjunctivitis, blepharitis, lid anomalies, foreign body removal, etc.

Treatment & Management of Ocular Disease: Posterior Segment (PS): The study of the etiology, clinical pathophysiology, diagnosis, treatment, management, and outcomes of therapeutic regimens for anomalies of the posterior segment of the human eye.
Examples: Degenerative, infective, and vascular diseases of the retina/choroid/sclera and optic nerve, inclusive of all aspects of surgical care involving the posterior segment of the eye, i.e., retinopathies, neuropathies, retinal laser surgery, retinal detachment surgery, etc.

C. RELATED SYSTEMIC DISEASE

Neuro-Optometry (NO): The study of the etiology, clinical evaluation, diagnosis, treatment and management of disease and disorders of the nervous system, both systemically and as it relates directly to the eye and visual system.
Examples: Includes all aspects of nervous system conditions involving the brain, cranial nerves, spinal cord, peripheral nerves, and corresponding muscles, i.e., multiple sclerosis, pituitary tumor, brain trauma, Myasthenia Gravis, papilledema, Horner’s Syndrome, etc.

Oral Pharmaceuticals (OP): The study of the etiology, clinical evaluation, diagnosis and treatment of ocular disease using the appropriate indications, prescription utilization, and follow-up assessment of the oral medications used for ocular therapy.

Pharmacology (PH): The study of the interaction of chemical agents with biological systems.
Examples: Toxicology; adverse effects of systemic drugs; adverse effects of ocular drugs; control of ocular pain. Any courses related to medications and how they affect the various tissues or their mechanism of actions.

Principles of Diagnosis (PD): The study of the art and science of the process of determining the nature and circumstances of a diseased condition with emphasis on the biological and clinical procedures utilized in medical examination and disease differentiation, and underlying clinical pathophysiology, e.g., corneal topography, visual fields (unless specific to glaucoma); laboratory testing and imaging; fluorescein angiography; gonioscopy.

Systemic/Ocular Disease (SD): The study of the relationship of any anomaly of normal function of the human body and the possible manifestation of such as signs and/or symptoms in the eye or visual system.
Examples: General study of diabetes, HIV/AIDS, thyroid disease, etc., along with their ocular manifestations. Vascular diseases both systemic and ocular.
D. OPTOMETRIC BUSINESS MANAGEMENT

Ethics/Jurisprudence (EJ): The study of the body of law in the practice of optometry and its relationship to the medicolegal system.

Examples: Any courses related to the rules and practice acts for optometry, or addressing medicolegal issues related to patient treatment, and liability concerns and issues.

Practice Management (PM): The study of management of the business affairs of optometric practice. This includes the concepts of managed care and operations management, courses designed to help market practices, to educate office staff, to improve billing efficiency and coding skills, to improve clinical recordkeeping and to enhance fiscal efficiency. EHR and ICD-10 courses are included in this category. This does not include courses that are intended for personal enhancement or investment prowess.

COURSE PRESENTATION DEFINITIONS

The method used to present the information in a course. More than one presentation method can be used in a course. This information is used by many optometric licensing boards as part of the process of approval of accredited CE for license renewal.

COPE utilizes the following specific definitions for course presentations:

CD-DVD: A presentation recorded on a CD-ROM or DVD that provides one way content to the learner. See DISTANCE LEARNING/MULTIMEDIA POLICY on page 21.

GRAND ROUNDS: A presentation of clinical cases involving actual patient encounters, and the discussion of the diagnosis and treatment of that particular patient condition.

HANDS-ON WORKSHOP: A laboratory that emphasizes the demonstration and application of hands-on techniques and skills in optometric procedures and instrumentation.

LECTURE: A discourse given before an audience for the purposes of instruction in an area of study with one or more instructors.

ONLINE: The presentation of clinical cases or information related to professional eye care delivered solely via the Internet. See DISTANCE LEARNING/MULTIMEDIA POLICY on page 21.

PANEL: A discourse in a given area of study, presented by usually three or more simultaneous instructors.

POSTERS: The presentation of a poster at a scientific meeting. Authors must be present with the leading author meeting the COPE criteria. Interactivity is required for credit.

SYMPOSIA: A presentation usually by multiple persons on numerous topics, each presented in a short time frame.

WRITTEN: The presentation of clinical cases or information related to professional eye care solely in a written (printed/typeset), or electronically recorded format. See DISTANCE LEARNING/MULTIMEDIA Policy on page 21.
COURSE FORMAT DEFINITIONS

The method used to physically teach a course. COPE uses the following specific format definitions.

A. **LIVE**: A live format is when the instructor is in the same room with the participants, even if other formats are used as audiovisual aids for teaching the course. The instructor is face-to-face with the audience and can touch the participants.
   1. **CE**: There is no post-course test.
   2. **CEE** (Continuing Education with Examination): There is a post-course test. 
      **Important**: See CEE Policy, page 22.

B. **DISTANCE LEARNING/MULTIMEDIA**: The course instructor is not physically present (not face to face).
   1. **Interactive Distance Learning**:
      • **Examples**: Webinar, video conference, teleconference, or other format that allows for immediate interaction and feedback between the audience and the instructor. Once the event has taken place, learners may no longer participate in that activity.
   2. **Enduring Distance Learning (Non-Interactive)**:
      • **Examples**: Webcast, podcast, video, journal, website, written or other format that provides one-way content to the audience without immediate interaction with the instructor. There is not just one time on one day to participate in the activity, rather, the participant determines when he/she participates.

COURSE QUALIFICATION PERIOD

The course qualification period for each course qualified by COPE will depend on the format of the course. After qualification, courses with a live OR interactive distance learning format will be valid for one year. Courses with an enduring distance learning format will be valid for three years.

*For example:*
- **Live Courses**: 1 Year Qualification Period
- **Interactive Online Courses**: 1 Year Qualification Period
- **Enduring Online Courses**: 3 Year Qualification Period
- **Audio/Video Courses**: 3 Year Qualification Period
- **Written Courses**: 3 Year Qualification Period
COPE ACCREDITATION POLICIES

DISTANCE LEARNING/MULTIMEDIA POLICY

NOTE: Because of statutes and/or regulations governing some licensing boards, Distance Learning/Multimedia courses do not qualify as CEE Courses. Only live lectures qualify as CEE courses.

A course qualifies as Distance Learning/Multimedia if it is presented in any of the following formats where the instructor is not physically present:

- **Interactive Distance Learning**—Examples: Webinar, video conference, teleconference, or other format that allows for immediate interaction and feedback between the audience and the instructor. Once the event has taken place, learners may no longer participate in that activity.

- **Enduring Distance Learning**—Examples: Webcast, podcast, video, journal, website, written or other format that provides one-way content to the audience without immediate interaction with the instructor. There is not just one time on one day to participate in the activity, rather, the participant determines when he/she participates.

Courses presented for COPE review under any of the Distance Learning/Multimedia formats must comply with the following requirements:

A. Courses must include a post-course test to verify learning.
B. Post-course tests and answer keys must be reviewed by an accredited school of optometry, medicine, pharmacy or osteopathy.
C. Tests must be in multiple-choice question (MCQ) and should conform to the National Board of Examiners in Optometry’s (NBEO) *Item Writer’s Manual*.
D. Post Course tests must receive a score of at least 70% or better in order for a certificate of completion to be issued.
E. Post-course tests must include a minimum number of questions based on the length of the course.
   - 0.25 hours/units require a minimum of 3 questions
   - 0.50 hours/units require a minimum of 5 questions
   - 1.00 hours/units require a minimum of 10 questions
F. The post-course test and answer key must be uploaded with the application materials to COPE.
G. Tests may accompany a course as part of the delivery mechanism (i.e., an internet-based course may allow test candidates to take the test online; or a correspondence course may include the test in the same publication as the article, etc.)
H. Post-course test evaluations may be done by the sponsoring school or other impartial method. The sponsoring school is responsible for ensuring that the test and answer key are valid and that the grading process is objective. The school must ensure the administration and grading of the test is unbiased, if they are not grading the test themselves.
CONTINUING EDUCATION WITH EXAMINATION (CEE) POLICY
(Also known as Transcript Quality (TQ) or Certified CE.)

Courses presented to COPE for qualification as Continuing Education with Examination (CEE) courses must include a post-course test to verify learning and comply with the following criteria:

A. Courses must be at least 2 hours in duration; only ‘live’ courses are eligible for CEE credit.
B. Courses must be sponsored by an accredited school of optometry, medicine, pharmacy or osteopathy; a statement must be provided certifying that the institution will assume responsibility for the testing and grading of the post-course assessment. The name and address of the sponsoring institution must be prominently displayed on the documentation of post-course test results sent to each participant. See sample statement below.
C. Post-course tests must be in multiple-choice question (MCQ) format and should conform to the National Board of Examiners in Optometry’s (NBEO) Item Writer’s Manual. Visit www.optometry.org for a copy of the manual, or visit the COPE downloads page to find a link to the manual. In general, multiple-choice questions should incorporate a simple stem that poses a question, or forms an incomplete statement (which is completed by the selected answer), and provides four or five options from which the test candidate will select one answer.
D. Test candidates must receive a score of at least 70% or better in order for a certificate of completion to be issued.
E. Tests must include at least (10 questions for each hour of credit. The number of test questions should be rounded up for courses of partial duration (i.e., a 2.5 hour course must provide 30 test questions, etc.).
F. Instructors who submit CEE courses acknowledge that course attendees are not prepped on test questions or guided on test content areas during course instruction. Furthermore, instructors must make no reference to test questions in the course outline, or in any other course handout. On occasion, an instructor may elect to present a CEE course as CE (i.e. without the examination), but this must be disclosed in advance to the administrator and the course attendees.
G. If the post-course test is given on-site, it must be administered in an atmosphere of educational integrity. If not tested on-site, the test must be mailed directly to the attendee after the completion of the course who must then complete it and return it to the sponsoring school for evaluation. Tests may not be removed from the course site by candidates and administrators and providers must assure adequate security in all testing environments.
H. A printed copy of the post-course test and answer key must be included with the course application (confidentiality of any test submitted to COPE will be maintained).

When developing post-course tests, instructors should note the following (this is a brief overview of test preparation and does not replace a thorough review of the NBEO's Item Writer's Manual):

- The scope of the test should address the material in the course outline and correspond with content areas and areas of emphasis.
- Item options (answer choices) should be based on prior knowledge or knowledge taught in course.
- Instructors should undertake a simple post-test analysis of the results to determine if there are any flawed items (i.e., items that, due to low or erratic scores, are revealed as ambiguous, confusing or inaccurate) and remove them from future tests. The scoring for a test where items are flawed and removed should be recalibrated accordingly.
- Scores should be expressed as a percentage in all cases.
- Instructors should identify relative importance in course outline, and item distribution should match emphases.
- Administrators and providers must maintain records of post-course tests and when authorized by the participating doctor, verify the score for a period of five years from the date of the continuing education activity.
SAMPLE FINANCIAL RELATIONSHIP DISCLOSURE

COPE offers this document as a sample for COPE Administrators, Accredited Providers, Instructors and planning committee members to use for disclosing relevant financial relationship information. All elements of this form must be included with the course submission. **NOTE:** **COPE Administrators and Providers are not required or expected to use this document; it only serves as an example.**

**Disclosure of Relevant Financial Relationships**

Name: [INSERT NAME]
Activity Title: [INSERT COPE ACCREDITED ACTIVITY NAME]
Content of Activity: [INSERT SUMMARY OF CONTENT]
Date of Activity: [INSERT DATE OF ACTIVITY]

First, list the names of proprietary entities producing health care goods or services, consumed by, or used on patients, with the exemption of non-profit or government organizations and non-health care related companies with which you or your spouse/partner have, or have had, a relevant financial relationship within the past 12 months. For this purpose we consider the relevant financial relationships of your spouse or partner that you are aware of to be yours.

Second, describe what you or your spouse/partner received (ex. Salary, honorarium, etc.). [COPE PROVIDER NAME] does not want to know how much you received.

Third, describe your role:

☐ I do not have any relevant financial relationships with any commercial interests.

My signature on this document confirms all of the following:

- I have read and will comply with the COPE requirements for course qualification. I further agree to notify COPE in writing should any information provided, including financial/proprietary information, change at any time during the one year qualification period of this course.
- I agree that I will keep my presentation free from commercial interest or bias. I will maintain independent control over the content of my presentation, so that it is balanced, objective, presented with scientific rigor and not be for the purpose of promoting products, equipment, etc. (Therefore, my presentation should not be perceived by attendees as a commercial.) I further agree that I will not change the basic content of my presentation following approval.
• I agree to disclose to the audience the existence of any significant financial/professional relationships with the manufacturer(s) of any commercial product(s) and/or the provider(s) of any commercial service(s) discussed in the educational presentation. (Said relationships can include such things as grant/research support, employment, consulting and/or speakers bureau arrangements, major stock ownership, etc.) I will disclose any of these relationships, whether or not there is direct commercial support for the CE activity. This disclosure is made to provide the audience the information on which they can make judgments as to a presenter’s objectivity.
• I agree to disclose the attendees; a) when products or procedures being discussed are off label, unlabeled, experimental, and/or investigational (not FDA approved); b) any limitations on the information that is presented, such as data that are preliminary or that represent ongoing research, interim analyses, and/or unsupported opinion.
• I agree I have an ethical responsibility to make appropriate decisions related to my presentation, and all issues involving financial remuneration. (Considerations in this regard could include kickback schemes or multiple remunerations for a single event.)

Signature: ________________________________
Date: ________________________________

INSTRUCTOR COURSE SUBMISSION ACKNOWLEDGEMENT

If a COPE Administrator or Accredited Provider is submitting a course on behalf of an instructor, the instructor must acknowledge the submission and the Administrator or Provider must attach the signed acknowledgement when submitting the course to COPE.

SAMPLE INSTRUCTOR ACKNOWLEDGEMENT

I, [INSERT NAME] acknowledge that this course, [INSERT COURSE TITLE], meets all the COPE requirements. I give my approval for [INSERT SUBMITTER NAME of ORGANIZATION NAME] to submit this course for COPE qualification on my behalf.

Instructor Signature and Date
SAMPLE COMMERCIAL DISCLOSURE STATEMENTS

NOTE: COPE Administrators and Accredited Providers are not required or expected to use the identical language in these disclosures. The following statements only serve as examples of elements that should be included in disclosure of relevant financial relationships to course participants.

FOR ADMINISTRATORS and ACCREDITED PROVIDERS:

1. The content of this COPE Accredited CE activity was planned and prepared independently by (Administrator or Provider) without input from members of a commercial interest.

2. (Administrator or Provider) has received commercial support from (Corporate Supporter) for this activity in the form of an unrestricted educational grant.

FOR INSTRUCTORS:

NOTE: A disclosure slide MUST be at the beginning of every presentation.

1. (Instructor) has a relevant financial relationship with (Commercial Interest). He/she serves as a (consultant, speaker, etc.)

   OR

2. (Instructor) has no relevant financial relationships to disclose.

3. The content and format of this course is presented without commercial bias and does not claim superiority of any commercial product or service.

FOR PERSONS WHO ASSIST THE INSTRUCTOR WITH CONTENT DEVELOPMENT:

1. (Person) is affiliated with (Commercial Interest) as a (consultant, speaker, etc)

   OR

2. (Person) has no direct financial or proprietary interest in any companies, products or services mentioned in this presentation.
SAMPLE STATEMENT FOR ACCREDITED SCHOOLS SPONSORING CEE

SAMPLE STATEMENT FOR ACCREDITED INSTITUTIONS SPONSORING CONTINUING EDUCATION WITH EXAMINATION (CEE) COURSES

(Printed on official letterhead)

December 1, 20XX

ADMINISTRATOR or PROVIDER NAME
ADMINISTRATOR or PROVIDER ADDRESS

This letter confirms that ABC College of Optometry is responsible for the testing and grading of the post-course test for the courses listed below, scheduled for the XYZ Annual Meeting, January 5-6, 20XX, in Atlanta, GA. ABC College of Optometry will provide documentation of the test results to each participant.

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Instructor(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Use of TPAs in Contact Lens Practice</td>
<td>John Smith, OD</td>
</tr>
<tr>
<td>Contact Lens Management of Irregular Astigmatism: Video</td>
<td>Tim Roth, OD</td>
</tr>
<tr>
<td>Grand Rounds</td>
<td>Terry Maine, OD</td>
</tr>
<tr>
<td>Advanced Contact Lens Applications: Reversed Geometry</td>
<td>Phil Bartleby, OD</td>
</tr>
<tr>
<td>Lenses</td>
<td></td>
</tr>
</tbody>
</table>

Sincerely,

Emily Provost, OD, Dean
ON-SITE REVIEW OF COPE CONTINUING EDUCATION

All COPE Reviewers who have completed the online training modules are encouraged to perform on-site reviews. Your qualifications to provide this service are an important element in COPE’s ongoing efforts to assure the quality and independence of optometric continuing education for licensing boards, for the profession at large, and ultimately for the protection of the public.

COPE may provide some reimbursement of expenses depending upon the nature of the on-site review and the availability of reimbursement funds. We ask that you conduct on-site reviews at all CE meetings you attend. You may conduct a review of as many or as few courses as you wish. All feedback from our reviewers is considered valuable, even if only from a single course. Please read the directions carefully before conducting your on-site review. Any reviewer who performs five on-site reviews in one year will receive a complimentary OE TRACKER annual subscription for one year.

On-Site Review Methodology
The goal of the on-site review process is to obtain useful, objective information that will be utilized by both the ARBO administrative staff and the COPE Committee for determination of compliance with COPE guidelines and Standards for Commercial Support. The COPE Committee and staff will make the final determination of compliance, not the individual reviewer.

Standardized forms for both COPE course presentations and COPE Administrators/Providers are provided to ensure a fair and uniform evaluation process. A general comments section is included on each checklist to allow for additional input. Your experienced judgment and comments are of great value.

In addition to the mandatory disclosure statement regarding proprietary interest, it is important to evaluate if the content is free from commercial bias. Presentations must give a balanced view of therapeutic options. Use of generic terms will contribute to impartiality. If the presentation uses trade names, the trade names from a single company should not be used. If, in your opinion, the lecturer presents information that is primarily marketing in nature, indicate that on your form.

Responsibilities as a COPE Reviewer During an On-Site Review

1. Be sure the meeting you are attending and reviewing is promoting COPE-Accredited courses.
2. If you seek CE credit for the course you are reviewing, you must register and pay for the course in the same manner as any other participant.
3. Complete your on-site review in a professional manner. In most cases, it is preferable to remain anonymous in your role as COPE Reviewer while on-site.
4. Do not share your completed evaluation with any of the CE provider’s staff, the instructor, or any other attendee. Return your completed evaluations to COPE as soon as possible.
5. Do not seek feedback from meeting attendees. Make your own judgments about the quality of the courses you review and the administration of the meeting.
Overview of COPE On-Site Review of CE
The on-site review consists of two parts:

1. Evaluate the course presentation-
   Use a separate course review form to evaluate each course that you attend. It is important that you note the COPE ID number on your evaluation so that we may correctly identify it. For a more thorough review, please look over the original course application and outline on the ARBO website before attending the course.

2. Evaluate the administration of the meeting/event-
   Use the program review form to assess aspects of meeting administration, such as monitoring, course documentation, facilities, etc. We recommend that you complete this form at the conclusion of your attendance at the meeting. Complete only one form per meeting regardless of how many courses you attended.

The forms to conduct a COPE on-site review can be obtained online in the secure COPE Reviewer section of the ARBO website (www.arbo.org). After you complete the online training modules and are approved as a COPE Reviewer, you will be sent a username and password to access this section of the website. If you do not remember your username or password, please contact the ARBO office at 866-869-6852 or 704-970-2710.

HOW TO COMPLETE A COPE ON-SITE REVIEW
COPE Reviewers are encouraged to perform an on-site review (OSR) of every course they attend for CE credit. You may also occasionally be contacted by COPE to perform an OSR of a specific course as part of an investigation. The on-site review process is the same regardless of the reason for the OSR. Before beginning your review you should review COPE’s guidelines for both course qualification and activity administration, and review COPE’s Standards for Commercial Support of Continuing Education.

Before You Attend the Course:

1. Go to www.arbo.org and go to COPE at the top of the page. Move down the green dropdown box to COPE Reviewers and then over to COPE Reviewer Login. Alternatively, click on the hot link for COPE Reviewer Login.

2. Enter your COPE Reviewer username and password and click on Login to COPE Reviewers Area. You will be brought to the COPE Reviewer Home Page where you can schedule an OSR, submit the results of an OSR, or review the original application and outline/presentation for a course you plan to do an OSR on.

3. Go to Schedule an On-Site Review and enter the COPE Course ID number of the course you plan to review. Click on the gray button that says Schedule an On-Site Review.

4. You will then be provided with links to the course application and the files that were submitted with the course (instructor CV, course outline, test, answer key, etc.) You will also be able to see all upcoming activities where the course will be presented. Click on the button for the activity you are going to review then click on Review this Course.
5. If there are no upcoming activities listed for the course, or the event you want to attend is not listed, you can still do an OSR by filling in the name of the company/administrator of the meeting and the activity name, location and date. Next, click on Review Course Without Activity Scheduled to obtain the review forms.

6. Download the course and administration review forms by clicking on the box. Print out the forms and take them with you to the meeting. You will also receive an email with a copy of the forms. Please answer every question on the form and add any additional information you feel would be helpful.

Submit the Results of the On-Site Review:

1. After your OSR you can submit the results electronically by logging in to the COPE Reviewer section of the website. Any OSR’s you scheduled will be shown in the Onsite Reviews to Complete box.

2. Click on the review ID number for the course/activity you attended to open the electronic review forms and answer all the questions.

3. After you have completed the forms, click on Submit On-Site Course and Administrative Reviews. If you attended multiple courses at the same activity, you only need to answer the activity administration questions one time.

4. You can also fax your completed OSR forms to the ARBO office at 888-703-4848. After we have received your review forms, COPE may contact you for further information or to verify aspects of your review.
GLOSSARY OF COPE TERMS

Accreditation Review Committee
The committee that reviews data and information submitted for Provider and Activity Accreditation and makes accreditation determinations that are ratified by the ARBO Board of Directors. The Accreditation Review Committee is comprised of members of the ARBO Staff, members of the COPE Committee, members of the Accredited Provider/Administrator community, and other stakeholders from the optometric profession. The Accreditation Review Committee must complete training, prior to participating in the accreditation decision process, to ensure that all accreditation determinations are made in a consistent manner in accordance with COPE Accreditation Criteria and COPE Standards for Commercial Support.

Activity Number
Each activity shall be given a unique identification number. All documentation provided to an optometrist for submission to a licensing board, such as a certificate of attendance slip, must include the COPE activity number.

COPE Administrators will obtain an activity number once their Pre-Activity Accreditation Form has been reviewed and approved.

Accredited Providers will obtain activity numbers from COPE prior to their activity taking place.

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 1993 as a service to its member licensing 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:

- 501(c) Non-profit organizations (Note: 501(c) organizations are screened for eligibility. Those that advocate for commercial interests as a 501(c) 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 or medical practices
- For-profit hospitals
- For-profit rehabilitation centers
• For-profit nursing homes
• Blood banks
• Diagnostic laboratories

**Commercial Supporter**
Any proprietary entity providing educational grants to COPE Administrators and Accredited Providers.

**Competence**
The ability of a physician to combine knowledge, strategies and skills into action if called to do so. Competence may also be defined as “knowing how” to do something or what the physician would do given the opportunity to do so. For further reference, see: *Miller GE. The assessment of clinical skills/competence/performance. Acad. Med. 1990; 65(9 Suppl.):S63-7*

**Conflict of Interest**
A conflict of interest is created 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®) is a program of the Association of Regulatory Boards of Optometry (ARBO®). COPE accredits continuing optometric education providers and activities on behalf of optometric licensing boards.

**COPE Accredited CE**
Continuing education activities produced and delivered by COPE Administrators and Providers in compliance with the COPE Accreditation Criteria, Standards for Commercial Support, policies and procedures.

**COPE Activity**
An educational event or publication produced by a COPE Administrator or Provider in accordance with the COPE Accreditation Criteria, Standards for Commercial Support, policies and procedures.

**COPE Administrator**
The organization, group or entity assuming overall responsibility for program planning, promotion, on-site administration and financial management of CE activities who submits their activities individually for COPE accreditation.

**COPE Advisory Committee**
A committee established to give meaningful interprofessional input to the COPE Accreditation process. This committee has representation from the COPE Committee, COPE Provider, and COPE Administrator organizations. The Advisory Committee also serves as a peer review committee for appeals in case of COPE investigations of reported non-compliance.

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

COPE Provider
The organization, group, or entity assuming overall responsibility for program planning, promotion, on-site administration, and financial management of CE activities and who has successfully completed the COPE Provider Accreditation process.

Course Category
Each COPE Course is categorized into a generalized content area developed by COPE to meet the CE requirements for practitioner re-licensure of participating boards of optometry. Courses are categorized according to the major emphasis of the course content. Courses may be reallocated to a different content area by COPE during the review process, or at any point subsequent to its acceptance. For specific definitions of individual categories, see pages 17-19.

Course Demographics
Key course information entered into COPE’s database that is made available to regulatory boards of optometry (attendance and course authentication), program providers (future program planning), and general practitioners (future CE program attendance planning).

Course Description
A brief statement of what the instructor(s) intends to present. It is a thumbnail sketch summarizing the course which is suitable for publishing.

Course Format
The method used to physically teach a course. COPE uses the following specific format definitions.

A. LIVE: A live format is when the instructor is in the same room with the participants, even if other formats are used as audiovisual aids for teaching the course. The instructor is face-to-face with the audience and can touch the participants.
   1. CE: There is no post-course test.
   2. CEE (Continuing Education with Examination): There is a post-course test.

B. DISTANCE LEARNING/MULTIMEDIA: The course instructor is not physically present (not face to face).
   1. Interactive Distance Learning:
      Examples: Webinar, video conference, teleconference, or other format that allows for immediate interaction and feedback between the audience and the instructor. Once the event has taken place, learners may no longer participate in that activity.
   2. Enduring Distance Learning (Non-Interactive):
      Examples: Webcast, podcast, video, journal, website, written or other format that provides one-way content to the audience without immediate interaction with the instructor. There is not just one time on one day to participate in the activity, rather, the participant determines when he/she participates.
Course Number
COPE utilizes identification numbers to uniquely identify the courses, articles or other educational interventions. The course number is combined with the course category designation and must be listed on all certificates of attendance. (Example 12345-GL) Optometric licensing boards require the unique identification numbers in verification of maintenance of licensure.

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 1.5 to 2 page outline is typical for a one-hour course. See pages 13-14 for a sample outline.

Course Presentation
The method used to present the information in a course. More than one presentation method can be used in a course. This information is used by many optometric licensing boards as part of the process of approval of accredited CE for license renewal.

COPE utilizes the following specific definitions for course presentations:

**CD-DVD:** A presentation recorded on a CD-ROM or DVD that provides one way content to the learner. See DISTANCE LEARNING/MULTIMEDIA POLICY on page 21.

**GRAND ROUNDS:** A presentation of clinical cases involving actual patient encounters, and the discussion of the diagnosis and treatment of that particular patient condition.

**HANDS-ON WORKSHOP:** A laboratory that emphasizes the demonstration and application of hands-on techniques and skills in optometric procedures and instrumentation.

**LECTURE:** A discourse given before an audience for the purposes of instruction in an area of study with one or more instructors.

**ONLINE:** The presentation of clinical cases or information related to professional eye care delivered solely via the Internet. See DISTANCE LEARNING/MULTIMEDIA POLICY on page 21.

**PANEL:** A discourse in a given area of study, presented by usually three or more simultaneous instructors.

**POSTERS:** The presentation of a poster at a scientific meeting. Authors must be present with the leading author meeting the COPE criteria. Interactivity is required for credit.

**SYMPOSIA:** A presentation usually by multiple persons on numerous topics, each presented in a short time frame.

**WRITTEN:** The presentation of clinical cases or information related to professional eye care solely in a written (printed/typeset), or electronically recorded format. See DISTANCE LEARNING/MULTIMEDIA Policy on page 21.
Course Review
A service provided by COPE to validate clinical content of COPE Courses. COPE Reviewers will review the course learning materials prior to an activity to assure that the course has educational and scientific integrity, that the course contains customary/generally accepted optometric and medical practices, and that the course is in compliance with the COPE Standards for Commercial Support.

Credit Hour
COPE hours/units are defined in the following increments:

<table>
<thead>
<tr>
<th>Hours/Units of Credit</th>
<th>Minutes of Instructional Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.25 hours/units</td>
<td>15 minutes</td>
</tr>
<tr>
<td>0.50 hours/units</td>
<td>25 minutes</td>
</tr>
<tr>
<td>0.75 hours/units</td>
<td>40 minutes</td>
</tr>
<tr>
<td>1.00 hours/units</td>
<td>50 minutes</td>
</tr>
<tr>
<td>1.25 hours/units</td>
<td>65 minutes</td>
</tr>
<tr>
<td>1.50 hours/units</td>
<td>75 minutes</td>
</tr>
<tr>
<td>1.75 hours/units</td>
<td>90 minutes</td>
</tr>
<tr>
<td>2.00 hours/units</td>
<td>100 minutes</td>
</tr>
</tbody>
</table>

Curriculum Vitae (CV)
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).

Informatics
As defined by the U.S. National Library of Medicine, health informatics is the interdisciplinary study of the design, development, adoption, and application of IT-based innovations in healthcare services delivery, management, and planning.

Instructor
The person (or persons) who actually teaches the course, and who assumes responsibility for the educational content and method of presentation of the course.

Knowledge
Facts and information acquired by a learner through experience or education.

Performance
The demonstration of physician competence in clinical practice. It may also be defined as what the optometrist actually does in clinical practice. For further reference, see: Miller GE. The assessment of clinical skills/competence/performance. Acad. Med. 1990; 65(9 Suppl.):S63-7

Performance in Practice Activity Review Form
The form submitted by providers, in addition to the Self Study Report, to demonstrate that they are implementing the accreditation criteria within actual educational interventions/sessions.
**Practice Gap**
The difference between what optometrists are doing or accomplishing compared to what is achievable on the basis of current professional knowledge. A practice gap is an educational need that a physician knows they have or that a provider deduces from data. A practice gap is a description of a problem in practice that the administrator or provider will address with an educational intervention. Professional practice gaps can be clinical or non-clinical.

**NOTE:** Although citing knowledge as a practice gap is acceptable for some educational interventions, administrators and providers must demonstrate that their overall programs are based on practice gaps in the areas of optometric competence, performance, and/or patient outcomes.

**Pre-Activity Accreditation Form**
The document utilized by COPE Administrators to demonstrate that they are implementing the accreditation criteria within the initial planning of an educational activity/intervention.

**Post-Activity Accreditation Form**
The document submitted by COPE Administrators within 30 days of the completion of the educational intervention/session to demonstrate full compliance of the accreditation criteria including a post-activity educational outcomes assessment.

**Probation**
One of the potential accreditation determinations given to Accredited Providers and Administrators that have serious problems meeting COPE accreditation requirements. The Accredited Provider or Administrator must correct the noncompliance issues in order to achieve accreditation. Probation may also be given to Accredited Providers whose progress reports are rejected.

**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 licensing board-endorsed optometrist or a faculty at an optometric school or college who has completed the COPE Reviewer training program successfully.

COPE Reviewers serve indefinitely but must periodically re-certify to continue as a COPE Reviewer. They are not compensated for their service. COPE Reviewers serve two primary functions. COPE Reviewers validate clinical content in courses submitted to COPE through the Course Review Program and also provide objective feedback via direct observation of a COPE Activity regarding compliance with COPE Accreditation Criteria, Standards for Commercial Support, and policies.
COPE STANDARDS FOR COMMERCIAL SUPPORT (COPE SCS): Standards to Ensure Independence in CE Activities

Standard 1: Independence

Standard 1.1 A CE provider must ensure that the following decisions were made free of the control of a commercial interest. (See page 29 for a definition of a "commercial interest" and some exemptions.) (a) Identification of CE needs; (b) Determination of educational objectives; (c) Selection and presentation of content; (d) Selection of all persons and organizations that will be in a position to control the content of the CE; (e) Selection of educational methods; (f) Evaluation of the activity.

Standard 1.2 A commercial interest cannot take the role of non-accredited partner in a joint provider relationship.

Standard 2: Resolution of Personal Conflicts of Interest

Standard 2.1 The provider must be able to show that everyone who is in a position to control the content of an education activity has disclosed all relevant financial relationships with any commercial interest to the Provider. COPE defines "'relevant' financial relationships" as financial relationships in any amount occurring within the past 12 months that create a conflict of interest.

Standard 2.2 An individual who refuses to disclose relevant financial relationships will be disqualified from being a planning committee member, a teacher, or an author of CE, and cannot have control of, or responsibility for, the development, management, presentation or evaluation of the CE activity.

Standard 2.3 The provider must have implemented a mechanism to identify and resolve all conflicts of interest prior to the education activity being delivered to learners.

Standard 3: Appropriate Use of Commercial Support

Standard 3.1 The provider must make all decisions regarding the disposition and disbursement of commercial support.

Standard 3.2 A provider cannot be required by a commercial interest to accept advice or services concerning teachers, authors, or participants or other education matters, including content, from a commercial interest as conditions of contributing funds or services.

Standard 3.3 All commercial support associated with a CE activity must be given with the full knowledge and approval of the provider.

Standard 3.4 The terms, conditions, and purposes of the commercial support must be documented in a written agreement between the commercial supporter that includes the provider and its educational partner(s). The agreement must include the provider, even if the support is given directly to the provider's educational partner or a joint provider.

Standard 3.5 The written agreement must specify the commercial interest that is the source of commercial support.
Standard 3.6 Both the commercial supporter and the provider must sign the written agreement between the commercial supporter and the provider.

Standard 3.7 The provider must have written policies and procedures governing honoraria and reimbursement of out-of-pocket expenses for planners, teachers and authors.

Standard 3.8 The provider, the joint provider, or designated educational partner must pay directly any teacher or author honoraria or reimbursement of out-of-pocket expenses in compliance with the provider's written policies and procedures.

Standard 3.9 No other payment shall be given to the director of the activity, planning committee members, teachers or authors, joint sponsor, or any others involved with the supported activity.

Standard 3.10 If teachers or authors are listed on the agenda as facilitating or conducting a presentation or session, but participate in the remainder of an educational event as a learner, their expenses can be reimbursed and honoraria can be paid for their teacher or author role only.

Standard 3.11 Social events or meals at CE activities cannot compete with or take precedence over the educational events.

Standard 3.12 The provider may not use commercial support to pay for travel, lodging, honoraria, or personal expenses for non-teacher or non-author participants of a CE activity. The provider may use commercial support to pay for travel, lodging, honoraria, or personal expenses for bona fide employees and volunteers of the provider, joint provider or educational partner.

Standard 3.13 The provider must be able to produce accurate documentation detailing the receipt and expenditure of the commercial support.

Standard 4: Appropriate Management of Associated Commercial Promotion

Standard 4.1 Arrangements for commercial exhibits or advertisements cannot influence planning or interfere with the presentation, nor can they be a condition of the provision of commercial support for CE activities.

Standard 4.2 Product-promotion material or product-specific advertisement of any type is prohibited in or during CE activities. The juxtaposition of editorial and advertising material on the same products or subjects must be avoided. Live (staffed exhibits, presentations) or enduring (printed or electronic advertisements) promotional activities must be kept separate from CE.

• For print, advertisements and promotional materials will not be interleaved within the pages of the CE content. Advertisements and promotional materials may face the first or last pages of printed CE content as long as these materials are not related to the CE content they face and are not paid for by the commercial supporters of the CE activity.

• For computer-based, advertisements and promotional materials will not be visible on the screen at the same time as the CE content and not interleaved between computer “windows” or screens of the CE content. Also, COPE Providers may not place their CE activities on a website owned or controlled by a commercial interest. With clear
notification that the learner is leaving the educational website, links from the website of a COPE Provider to pharmaceutical and device manufacturers’ product websites are permitted before or after the educational content of a CE activity, but shall not be embedded in the educational content of a CE activity. Advertising of any type is prohibited within the educational content of CE activities on the internet including, but not limited to, banner ads, subliminal ads, and pop-up window ads. For computer-based CE activities, advertisements and promotional materials may not be visible on the screen at the same time as the CE content and not interleaved between computer windows or screens of the CE content.

- For audio and video recording, advertisements and promotional materials will not be included within the CE. There will be no “commercial breaks.”
- For live, face-to-face CE, advertisements and promotional materials cannot be displayed or distributed in the educational space immediately before, during, or after a CE activity. Providers cannot allow representatives of commercial interests to engage in sales or promotional activities while in the space or place of the CE activity.
- For journal-based CE, none of the elements of journal-based CE can contain any advertising or product group messages of commercial interests. The learner must not encounter advertising within the pages of the article or within the pages of the related questions or evaluation materials.

**Standard 4.3** Educational materials that are part of a CE activity, such as slides, abstracts and handouts, cannot contain any advertising, corporate logo, trade name or a product-group message of a COPE-defined commercial interest.

**Standard 4.4** Print or electronic information distributed about the non-CE elements of a CE activity that are not directly related to the transfer of education to the learner, such as schedules and content descriptions, may include product-promotion material or product-specific advertisement.

**Standard 4.5** A provider cannot use a commercial interest as the agent providing a CE activity to learners, e.g., distribution of self-study CE activities or arranging for electronic access to CE activities.

**Standard 5: Content and Format without Commercial Bias**

**Standard 5.1** The content or format of a CE activity or its related materials must promote improvements or quality in healthcare and not a specific proprietary business interest of a commercial interest.

**Standard 5.2** Presentations must give a balanced view of therapeutic options. Use of generic names will contribute to this impartiality. If the CE educational material or content includes trade names, where available trade names from several companies should be used, not just trade names from a single company.

**Standard 6: Disclosures Relevant to Potential Commercial Bias**

**Standard 6.1** An individual must disclose to learners any relevant financial relationship(s), to include the following information: The name of the individual; The name of the commercial interest(s); The nature of the relationship the person has with each commercial interest.
**Standard 6.2** For an individual with no relevant financial relationship(s) the learners must be informed that no relevant financial relationship(s) exist.

**Standard 6.3** The source of all support from commercial interests must be disclosed to learners. When commercial support is "in-kind" the nature of the support must be disclosed to learners.

**Standard 6.4** 'Disclosure' must never include the use of a corporate logo, trade name or a product-group message of a COPE-defined commercial interest.

**Standard 6.5** A provider must disclose the above information to learners prior to the beginning of the educational activity.

*COPE has adopted the ACCME® Standards for Commercial Support: Standards to Ensure Independence in CME ActivitiesSM as COPE policy. Use with permission of the Accreditation Council for Continuing Medical Education (ACCME).*
COPE ACCREDITATION CRITERIA

A. EDUCATIONAL PURPOSE

Criterion 1: The provider has a CE mission statement for the organization that includes the expected results articulated in terms of changes in competence, performance or patient outcomes that will be the result of the program.

* Criterion 1 is only applicable in Provider Accreditation. It is not required for accredited activities.

B. EDUCATIONAL ACTIVITY PLANNING

Criterion 2: The provider incorporates into CE activities the educational needs (knowledge competence, or performance) that underlie the professional practice gaps of their learners.

Criterion 3: The provider generates activities/educational interventions that are designed to change competence, performance, or patient outcomes as described in its mission statement.

Criterion 4: The provider ensures that the content of the CE is valid, the intervention has scientific and educational integrity and contains customary and generally accepted optometric and medical practices. (Standards for Commercial Support 5)

Criterion 5: The provider chooses educational formats for activities/interventions that are appropriate for the setting, objectives, and desired results of the activity.

Criterion 6: The provider develops activities/educational interventions in the context of desirable professional (i.e. optometrist) attributes. (e.g. Institute of Medicine’s Core Competencies for Health Care Professionals, ASCO Attributes of Students Graduating from Schools and Colleges of Optometry, ABO/ACGME, ABMS Competencies).

Criterion 7: The provider develops activities/educational interventions independent of commercial interests. (Standards for Commercial Support 1, 2, & 6)

Criterion 8: The provider appropriately manages commercial support. (Standards for Commercial Support 3)

Criterion 9: The provider maintains a separation of promotion from education. (Standards for Commercial Support 4)

Criterion 10: The provider promotes improvements in health care and NOT proprietary interests of a commercial interest. (Standards for Commercial Support 5)

C. EVALUATION AND IMPROVEMENT

Criterion 11: The provider analyzes changes in learners (competence, performance, or patient outcomes) achieved as a result of the overall program’s activities/educational interventions.

Criterion 12: The provider gathers data or information and conducts a program-based
analysis on the degree to which the CE mission of the provider has been met through the conduct of CE activities/educational interventions.

*Criterion 12 is only applicable in Provider Accreditation. It is not required for accredited activities.

**Criterion 13:** The provider identifies, plans, and implements the needed or desired changes in the overall program (e.g. planners, teachers, infrastructure, methods, resources, facilities, interventions) that are required to improve on ability to meet the CE mission.

*NOTE: For Activity Accreditation, COPE Administrators will identify and plan the needed or desired changes (e.g. planners, teachers, infrastructure, methods, resources, facilities, interventions) from the activity that may be utilized to improve future educational activities.

*COPE has adopted the ACCME® Accreditation Criteria. Used with the permission of the Accreditation Council for Continuing Medical Education (ACCME).*
COPE REVIEWER FREQUENTLY ASKED QUESTIONS

Should I accept a course even though I am recommending changing the category?
No, please mark the course provisional and state the appropriate category. The instructor will be notified to make sure they accept the change. If so, the course category will be changed and the application will be approved by the staff.

Should I mark a course provisional if the description or objectives is more than 35 words?
No, the 35 word limit on the application is simply a guideline. If the description or objectives are more than 35 words, but you feel the course merits acceptance, please go ahead and accept it.

Should I request a disclosure from the instructor even though on the application the “No Disclosure” box is checked?
If you feel there may be a conflict of interest based on the CV of the instructor, please mark the course provisional and request a formal disclosure. Also, if there are multiple instructors on the course and you feel a conflict of interest may exist, please request formal disclosures from all.

The Certification of Compliance (question 5 on the course application) was not signed by the instructor, should I mark the course provisional?
No, the Certification of Compliance can be signed by either the instructor OR the submitter of the course.

The course application says a test accompanies the course, but there was no test attached. Should I mark the course provisional?
No, the default for the application will always say the test accompanies the course. If the box is checked “no” for either CEE or Distance Learning, a test is not necessary.

Do Distance Learning courses have to be 2 hours?
No, distance learning courses can be a minimum of 15 minutes. However, all CEE courses must be LIVE and a minimum of 2 hours. Both CEE and Distance Learning courses require a test and a sponsoring school letter.

Are there reimbursement funds available to perform On-Site Reviews?
Currently there are no funds to reimburse you for performing an On-Site review. Any reviewer who performs five on-site reviews in one year will receive a complimentary OE TRACKER annual subscription for one year. We ask that you conduct on-site reviews at all CE meetings you attend. All feedback from our reviewers is considered valuable, even if only from a single course.