

THE GREENSHEET

WINTER

Edited by Janet L. Carter, O.D.

2009

ARBO 2008-2009 COMMITTEE ROUNDUP

Many thanks to these dedicated ARBO volunteers for their contributions of time and expertise!

COPE COMMITTEE

The COPE Committee continues to remain busy managing the project as well as working on the implementation of the proposed new Standards for Commercial Support.

Committee Members

Jerald F. Combs, O.D.

Kentucky, Chair

Larry J. Barger, O.D.

Ohio

Beth De Spiegelaere, O.D.

Minnesota

Jill Martinson, O.D.

North Dakota

Bruce L. Rakusin, O.D.

Massachusetts

David K. Talley, O.D.

Tennessee

William B. Rafferty, O.D.

North Carolina, Board Co-Liaison

Jerry A. Richt, O.D.

North Carolina, Board Co-Liaison

Robert W. Smalling, O.D.

Arkansas, Consultant

Christina M. Sorenson, O.D.

Arizona, Ex-Officio

Staff: *Lisa Fennell*

BYLAWS COMMITTEE

The ARBO Bylaws Committee has begun meeting by conference calls to review potential enhancements to the ARBO bylaws. Should they have recommended changes, notice will be sent to all ARBO Member Boards in April of 2009.

Committee Members

Roger D. Pabst, O.D.

Minnesota, Chair

Patricia Bennett, M.S.W.

Maryland

Penny Bowie

Kansas

Howard F. Flippin, O.D.

Arkansas

Murray J. Turnour, O.D.

Ontario

Michael W. Ohlson, O.D.

Iowa, Board Liaison

Christina M. Sorenson, O.D.

Arizona, Ex-Officio

Staff: *Diane L. Nickolson*

CONTEMPORARY ISSUES COMMITTEE

The Contemporary Issues Committee has met by conference call and identified a number of great topics and speakers for the upcoming ARBO Annual Meeting. The speakers are in the process of being confirmed ... watch the website for the latest updates!

Committee Members

Roger D. Pabst, O.D.

Minnesota, Chair

Jeanne Murphy-Moore, O.D.

Maryland

Beth De Spiegelaere, O.D.

Minnesota

Murray J. Turnour, O.D.

Ontario

Susy Yu, O.D.

California

Stephen W. Lewis, O.D.

Louisiana, Board Liaison

William B. Rafferty, O.D.

North Carolina, Consultant

Christina M. Sorenson, O.D.

Arizona, Ex-Officio

Staff: *Diane L. Nickolson*

continued on page 6

ALSO IN THIS ISSUE

Message From the President	2
Discipline 101	3
Executive Director's Message	3
Meet our New Staff	4-5
OE TRACKER News	6
Call for Nominations	7
Regional Meeting Information	7
Annual Meeting Information	8



LETTER FROM THE PRESIDENT



*Dr. Christina Sorenson is the
President of ARBO*

This has been an exciting and busy time for ARBO. Our move to Charlotte is successfully completed. I can't wait for you all to meet the new staff; they are all outstanding professionals. If you are anywhere near our office in Charlotte, please consider it a "home away from home" and feel free to stop by. We would love to see you.

Dr. Bill Rafferty and I have been very busy as your ARBO representatives to the Joint Board Certification Project Team (JBCPT). An important presentation on the product of the JBCPT will be online the last week in January (look for a link from our ARBO website, www.arbo.org). We would greatly appreciate it if all of you would take the time to review this proposal being presented to the profession; your input and comments are welcome.

The COPE Standards for Commercial Support (SCS) are also moving forward. We will be having an educational meeting with the Accreditation Council for Medical Education (ACCME) soon; the Presidents of AOA, ASCO, ARBO, SECO, and the AAO as well as an additional representative from each organization will be present. The development of the exact SCS guidelines should follow that meeting.

The year 2009 should prove to be an exciting and challenging year for ARBO and the entire nation. There is so much on the horizon; not to mention a new administration in Washington! And speaking of Washington, our annual meeting in June will be in the greater D.C. area at the new Gaylord Hotel in Maryland. Look for registration and hotel information in this issue of the Greensheet. On the Wednesday immediately following our meeting the AOA will be sponsoring a day of Congressional visits and workshops on "the Hill." I hope that many of you will be able to attend that exciting event as well.

Thank you all for your support this year. I truly appreciate all that you do. If you have any comments, questions, or concerns about ARBO and our programs, please forward them to president@arbo.org. I look forward to seeing you in the Washington area in June.

Best regards and best wishes for a great 2009,

Christina M. Sorenson, O.D., F.A.A.O.
ARBO President

Discipline 101:

An Overview of
Difficult
(and Bizarre) Cases.

The following information was initially presented at the ARBO Annual Meeting in Seattle by Joe Baker, Jr., Florida Board Executive Director and Board Executive Directors/Administrators Committee member. The presentation's title was "Discipline 101: An Overview of Difficult (and Bizarre) Cases". This is the second of a two-part series.



Joe Baker, Jr is the Florida Board Executive Director and Board Executive Directors/Administrators Committee member

Let's continue our journey reviewing disciplinary cases by moving to Virginia for an example.

The case study involves an OD who was convicted – twice – for petit larceny. Under the terms of his conviction, he is to remain away from Food Giant stores and pay \$13.99 in restitution. Then, over a period of seven (7) years, he received three (3) DUIs. As recent as 2005 he was admonished for pressing his genitals against a patient's knee during an eye exam. From there he went on the next year to improperly posting the licenses and business cards of former business partners in his waiting room.

And this saga continues with the OD being disciplined in 2006 for practicing on an expired license (which was apparently posted in the lobby along with the information from his former colleagues). His next involvement with the regulatory board was due to improper treatment plans for seventeen patients --- all with very serious conditions. And to add additional insight into this non-compliant OD, in 2001 he was required by the board to have a scribe present during all treatments – and this was not being done.

By 2007 the board accepted a voluntary surrender for indefinite suspension to handle the multiple infractions involving this health care practitioner.

Moving next door to Kentucky we find an OD with an advertising issue – and some offers of heavenly intervention. The complainant, also an OD, advised the board of a colleague improperly advertising as a "specialist". The OD against whom the complaint is filed has a father who is a minister – and he takes up the cause of handling his son's complaint. He first alleges that the complaining OD has a hidden agenda and is in reality the anti-Christ. The minister father then tries to assure the board staff that he can intervene to prevent them from being influenced by this "bad" OD – and since he himself is a "specialist" in getting folks to heaven he'll help the staff out accordingly. The staff obviously feels quite intimidated by these types of calls regarding the case – which is quickly resolved when the OD agrees to update his sign to remove the "specialist" reference and comply with board guidelines. Amen and amen.

Thank goodness we're not in Kansas anymore – with the case where the table was turned. An OD filed a complaint



Diane Nickolson is the Executive Director of ARBO

A note from our Executive Director

I'm still finding it difficult to believe that it is 2009. For ARBO, this means a celebratory year acknowledging our 90th anniversary of assisting member licensing boards regulate the practice of optometry for the public welfare. 2009 brings many new faces, new challenges and a new home for our organization. We have made the move to Charlotte, and the office is coming together. I thank you for your understanding and patience while we have negotiated the move and worked to keep our service levels high. If you find yourself in Charlotte do stop by, we'd love to show off our new space!

You can see areas of the office in the new staff spread later in this issue, but more importantly you can check out our new ARBO staff team. They constantly amaze and excite me with their high levels of expertise and dedication. We are very fortunate to have found such exceptional new staff members, as well as being able to keep Stacey with us working remotely from her home office.

As evidenced in other articles in this issue, we have been busy supporting ARBO Committees, the Board of Directors and preparing for upcoming meetings. If you will be at SECO, plan to attend our Regional Meeting on March 7th. We are also planning for Regional Meetings during the Mountain West Council Meeting in April and the Midwest Eye Care Conference in May. Watch our website for more information when it becomes available; we hope representatives from every Member Board will have the opportunity to participate in one or more ARBO gathering this year.

Another continued focus for our staff is to enhance and improve the functionality and services of COPE and OE TRACKER. They have been working diligently to ensure the data is valid, current and accessible. Areas for improvements are constantly being identified by our staff and by you, our members and users. We are working to make the needed enhancements quickly and efficiently.

As we enter 2009 I wish you and yours a year full of laughter, good health and prosperity. Thank you for all you do for ARBO, the profession and the public we serve.

continued on page 7

MEET OUR NEW STAFF

As many of you may have noticed, our office relocation brought not only a new city, but some new staff members as well. Here is your chance to put a friendly face with those equally friendly voices you've come to know!



Ron Cassel

Bookkeeper

Ron is the president of Castle Business Solutions, LLC, which is a member of the National Association of Certified Public Bookkeepers, and also manages the Mecklenburg Bookkeepers Association, the local chapter of the National Bookkeepers Association, for the greater advancement of the knowledge of bookkeeping. A graduate of UNC Charlotte in Creative Design, Ron gained his Associates Degree in Microcomputer Accounting from Central Piedmont Community College in Charlotte while working as a bookkeeper trainee at Kendall Motor Oil.

Ron spent 18 years with Kendall before joining an accounting software company in Charlotte. As CFO of Business Systems of America, creators of ORDERS Plus software for BusinessWorks, Ron performed sales, technical support, technical writing and the accounting duties for six years at the small software company.

After two years as a Licensed Loan Officer in North and South Carolina, Ron opened Castle Business Solutions, LLC in 2007 to provide outsourced bookkeeping services to the Charlotte area. Ron is proud to be serving ARBO and considers them his anchor client. As a Certified Public Bookkeeper, Ron continues to maintain his certification with continuing education, including MS Excel 2007 Certification and graduation from the 2008 Jackson Hewitt Tax School.

Ron's personal life revolves around his family. His mother also lives in Charlotte, his brother in Winston Salem, and his sister in Orlando. He also has four nephews. After having graduated from Anderson College in the 1975 on a baseball scholarship, Ron remains an avid sports fan. He is an active member of the Alumni Association at UNC Charlotte and UNC Charlotte's Athletic Foundation.

Lisa is responsible for the communications, outreach, sales and high-level of customer service on the ARBO COPE, OE TRACKER and CELMO projects. Her objectives are to increase the understanding and use of the services to our member boards, CE administrators and the optometric community. Lisa staffs the OE TRACKER, COPE, CELMO and Executive Directors committees of ARBO.

Lisa comes to us with a rich project management, marketing and customer service background in both technical services and health care. Lisa's background includes six years as a Technical Service Representative and Product Manager for KPL Research Products. There she was responsible for supervising the release and marketing of over 20 new products, presenting technical seminars for clients, and providing technical support worldwide on over 400 products. She also served as a Clinical Trials Specialist for two years for Social and Scientific Systems (a contractor to the NIH) where she provided project management to research groups working on clinical trials, developed patient and physician materials for launch of new research studies and organized meetings, conference calls and retreats for physician working groups. Lisa has also worked as a Senior Editorial Project Manager for Invitrogen where her focus was on writing, editing and producing marketing communications and publications. Lisa has a BS in Biology, and lives in Charlotte with her husband and two children.



Lisa Fennell

**Project Communications
Specialist**



Paul Harris

Customer Service Representative

With Anita, Paul is responsible for the front-line support of our member boards, CE administrators and optometrists in the use of all ARBO services, including the annual meeting, COPE, CELMO and OE TRACKER. Paul also works on the ARBO publications and supports the CELMO applicants through the process.

Paul has a fairly diverse background in customer service, financial consulting and graphic design. He worked as a sales associate where he was responsible for record keeping, information distribution, inventory and filing systems, as well as sales and customer service for a cellular phone company. He also worked as a financial representative for Northwestern Mutual Financial Network after receiving his Bachelor Degree in Finance. Prior to receiving his degree, Paul worked as a designer and production manager for an advertising agency. Paul lives in Charlotte with his wife, and spends some of his time donating his design expertise to a number of local charities.

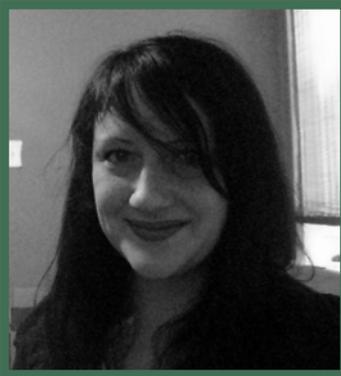


Anita Matthews

Customer Service Representative

With Paul, Anita is responsible for the front-line support of our member boards, CE administrators and optometrists in the use of all ARBO services, including the annual meeting, COPE, CELMO and OE TRACKER. Anita also works with potential COPE reviewers, shepherding them through the application process.

Anita comes to ARBO with experience in customer support for an insurance group, where she managed their database of insurance carriers. She assisted them with renewal, demographic, and subscriber information, audited completed renewals, and worked directly with the customers to answer questions. Prior to this position Anita worked at a private school as an assistant to the school director where she processed financial information, greeted visitors and produced correspondence, data analysis and generated reports as well as served as the internal troubleshooter for challenges with the office systems and technologies. She also worked as a Family/Health Service Coordinator where she had a caseload of over 30 children. Anita has a BS degree in Health Services Management, and lives in Charlotte with her husband and three children.



Stacey Steelman

COPE Administrator

A familiar name to all, Stacey has been with ARBO for over six years as the main support person for COPE. Her main focus is to work with the instructors, reviewers and administrators through the submission and approval processes for COPE courses.

As our most senior staff member (in years, certainly not age!) Stacey continues to provide the full staff team with support, guidance and historical knowledge. Stacey spends her evenings working on her degree in history, and also plans to take a grant-writing courses. she works remotely from her home office in St. Louis where she lives with her husband and a number of rescue animals.



Sean Steger

Web Developer

Sean is an e-commerce development expert with over ten years of experience developing, marketing, implementing and supporting e-commerce websites and customer service applications. His work has been very customer-focused, developing and designing functionality and programs to make them understandable, easy and effective for the end users.

Sean's initial focus for ARBO will be to work on improving the functionality of COPE, supporting the increased use and new functions of OE TRACKER, and working with the entire team on customer support issues.

Sean lives in Charlotte and is the proud father of twin daughters.

ARBO 2008-2009 COMMITTEE ROUNDUP CONTINUED

OE TRACKER COMMITTEE

The OE TRACKER Committee met in Charlotte on November 1-2, 2008. During the meeting the Committee discussed the value of OE TRACKER to the three groups that use it: Licensing Boards, CE Administrators, and Optometrists. The Committee identified a need for better communication and more education on the benefits of OE TRACKER. It was decided to have the ARBO staff develop and send out a survey to all of the member boards to get more information on each Board's continuing education auditing processes and their use of OE TRACKER to help with enhancements and improvements to the program.

The Committee discussed the importance of ensuring the accuracy of the data entered in OE TRACKER and agreed that it would be helpful to create a more detailed handbook for CE Administrators. Staff will work on developing a step-by-step manual that will be sent out to all CE Administrators. They will also create an Excel template for CE Administrators to use when submitting attendance data for OE TRACKER uploading. This will help with consistency and ensure all the information needed for OE Tracker is captured by the Administrators.

Staff and ARBO leaders will continue to do outreach to Licensing Boards and Optometrists to ensure they have a complete understanding of the value of using the OE TRACKER program, as well as to identify and create enhancements to the OE TRACKER program. The Staff will then develop a marketing plan to communicate and educate the Licensing Boards and Optometrists on the benefits of using OE TRACKER.

Committee Members

Howard F. Flippin, O.D.
Arkansas, Chair
Jeffrey L. Kraskin, O.D.
District of Columbia
Richard Orgain, O.D.
Tennessee
Roger D. Pabst, O.D.
Minnesota
Joseph Sullivan, O.D.
Kansas
Susie Yu, O.D.
California
Donovan L. Crouch, O.D.
Iowa, Co-Board Liaison
W. Ernest Schlabach, O.D.
Virginia, Co-Board Liaison
Steven H. Eyler, O.D.
North Carolina, Consultant
Jack E. Terry, O.D.
North Carolina, Consultant
Christina M. Sorenson, O.D.
Arizona, Ex-Officio
Staff: *Lisa Fennell*

NATIONAL BOARD EDUCATIONAL REVIEW COMMITTEE (NBERC)

In December of 2009 NBERC met in Charlotte, NC with the NBEO Examination Councils to evaluate the examinations as they relate to the scope of practice and generate specific recommendations for continued quality improvement in the National Board examinations.

Committee Members

Caroline Greigo, O.D.
Arizona, Chair
Doug Ayre, O.D.
Kansas
Gregory A. Foster, O.D.
Wisconsin
Martha Greenberg, O.D.
Alabama
Joseph Sullivan, O.D.
Kansas
Mike Weideman, O.D.
Wyoming
Michael W. Ohlson, O.D.
Iowa, Board Liaison
Christina M. Sorenson, O.D.
Arizona, Ex-Officio
Staff: *Diane Nickolson*

MEMBER BOARD EXECUTIVE DIRECTORS / ADMINISTRATORS COMMITTEE

The Committee has corresponded by email and has begun to identify the format, topics, and speakers for the upcoming ARBO Annual Meeting. They are planning a live gathering in January to work on some of the details. The 2009 presentations are promising to be the best ever!

Committee Members

Laurie Mickelson
Minnesota, Chair
Penny Bowie
Kansas
Joseph Baker, Jr.
Florida
Howard F. Flippin, O.D.
Arkansas
Margaret Whelan
Arizona
Michael W. Ohlson, O.D.
Board Liaison
Christina M. Sorenson, O.D.
Arizona, Ex-Officio
Staff: *Lisa Fennell*

OE TRACKER NEWS

Find out what's happening with OE TRACKER

Kansas Online**License Renewal Process**

The Kansas Board of Examiners in Optometry now offers online license renewal through their website for optometrists licensed in the state of Kansas. All CE attendance data in OE TRACKER will automatically be integrated into the Kansas license renewal system. Licensed O.D.s in Kansas will not have to enter their CE attendance information or submit any certificates for CE courses stored in OE TRACKER. To easily renew your Kansas license online, go to www.kssbeo.com, or to review your CE attendance history, go to www.arbo.org and click on OE TRACKER.

Arkansas License Renewal

The Arkansas State Board of Optometry recently sent out information on using OE TRACKER along with their license renewal notices. The information includes features and benefits of using OE TRACKER and step-by-step instructions for optometrists to login and review their CE attendance history to see if they are missing any CE hours prior to applying for license renewal.

2009 Annual Meeting Call for Nominations

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

Dr. Denise Dobbins, Chair, Kentucky
Dr. Larry J. Barger, Ohio
Dr. Gregory Foster, Wisconsin
Dr. Caroline Griego, Arizona
Dr. Janet L. Carter, Board Liaison

I also announce that three (3) members of the ARBO Board of Directors will be elected for terms as follows:

Two (2) Full 4-Year Terms
One (1) Partial 2-Year Term

Individuals wishing to be considered by the Nominating Committee for service on the ARBO Board of Directors shall send a statement to that effect, along with a current CV, to Ms. Diane Nickolson, Executive Director, at the ARBO office by June 10, 2009. The candidate should be available at the ARBO Annual Meeting for an interview by the Nominating Committee.

For more information, see ARTICLE V, Section 1 of the Bylaws, which is on the ARBO Website at <http://www.arbo.org>.

William B. Rafferty, O.D.
ARBO Secretary-Treasurer

DISCIPLINE 101 CONTINUED

against a former associate since her name had not been removed from the office signs. His response is to file a complaint against her – alleging she bilked Medicare and that's why they are no longer in business together. A lengthy board investigation eventually led to a finding of billing issues, which resulted in a settlement for \$15,000 in fines -- \$5,000 upfront and then an additional \$10,000 if similar complaints were received over a 24 month probationary period.

And to close with some news from Florida. A New York licensed OD got arrested for practicing without a license at a dozen locations – and for posing as an actual Florida licensee (with whom he attended optometry school). His arrest occurred while illegally parked in a handicapped spot at the local Wal-mart – his fake identity was determined by the arresting authorities through testimony of witnesses who thought he was “Dr So-and-So”. He was also charged with money laundering and marijuana possession. His father also died during this period of events. The case ends on a very sad note with the doctor committing suicide while the charges are all pending.

That wraps-up the disciplinary cases our committee reviewed during our last annual gathering. We always learn from each other – and are never amazed at the continually bizarre world of complaints and cases against our licensees.

Southern Regional Meeting of the Boards of Optometry

March 7, 2009 • Atlanta, GA

Once again ARBO will be holding a Regional Meeting of Boards of Optometry in conjunction with the Southern Council of Optometry (SECO) Annual Congress, which will be held March 4-8, 2009. The 2009 ARBO Regional Meeting will be held from 1:00 to 5:00 p.m. on Saturday, March 7 in the Omni Hotel, Atlanta, Georgia.

Soft drinks and light refreshments will be provided, and the meeting will feature reports by the Chair or Secretary of each Board of Optometry, or their designated representative; a report on current activities of ARBO; a report on current activities of the National Board of Examiners in Optometry (NBEO); and reports from Schools and Colleges of Optometry. There is no registration fee.

Members and staff of the Boards of Optometry in the Southern Region are urged to attend this important meeting. To enhance communication among optometric organizations, ARBO is also inviting state association representatives in the area and the deans and presidents of the schools and colleges of optometry. Your attendance will be of great value and will enhance communication between the optometric organizations participating in the meeting.

You can find information about the SECO meeting at their website: www.secointernational.com.

In order to ensure adequate accommodations for the meeting, please let us know you plan to attend by registering online at www.arbo.org. You will also be able to suggest items for inclusion on the agenda as you register. We anticipate sending a draft meeting agenda out to all registrants prior to the meeting.

If you need additional information contact Diane L. Nickolson, ARBO Executive Director at DNickolson@arbo.org or 704.970.2710.

We look forward to seeing you at the meeting!



Association of Regulatory Boards of Optometry, Inc.

200 South College Street
Suite 1630
Charlotte, NC 28202
Phone: 704-970-2710
Fax: 704-970-2720
E-mail: arbo@arbo.org
<http://www.arbo.org>

OFFICERS

President - *Christina M. Sorenson, O.D.*
Vice President - *Jerry A. Richt, O.D.*
Secretary-Treasurer - *William B. Rafferty, O.D.*
Immediate Past President - *Robert W. Smalling, O.D.*

DIRECTORS

Janet L. Carter, O.D.
Donovan L. Crouch, O.D.
Steven H. Eyler, O.D.
Stephen W. Lewis, O.D.
Michael W. Ohlson, O.D.
W. Ernest Schlabach, O.D.

STAFF

Executive Director - *Diane L. Nickolson*
Bookkeeper - *Ron Cassell*
Project Communications Specialist - *Lisa Fennell*
Customer Service Representative - *Paul Harris*
Customer Service Representative - *Anita Matthews*
COPE Administrator - *Stacey Steelman*
Web Developer - *Sean Steger*

Association of Regulatory Boards of Optometry

90th Annual Meeting • June 21-23, 2009
The Gaylord National Resort • National Harbor, MD

Mark your calendars to attend the 90th ARBO Annual Meeting in the new development of National Harbor, Maryland. You won't want to miss this special meeting celebrating 90 years of ARBO representing and assisting member licensing agencies in regulating the practice of optometry for the public welfare.

As you review your travel plans consider staying a day longer to participate in the AOA's Hill Day on June 24th. For those ARBO delegates wishing to participate we will arrange for a special orientation session preparing you for your visit to the Hill. We hope many of you will take advantage of this opportunity to be a part of the 2009 Optometry Rally on Capitol Hill.



You can easily register now for the ARBO 2009 Annual Meeting and make your hotel reservations directly from the ARBO Website at www.arbo.org!