

**SOUTH CAROLINA BOARD OF EXAMINERS IN OPTICIANRY  
BOARD MEETING AGENDA**

February 11, 2016 at 9:00 A.M.

110 Centerview Drive, Kingstree Building, Room 204  
Columbia, South Carolina

**Public Notice of this meeting was properly posted at the Opticianry Board Office, Synergy Business Park, Kingstree Building, and provided to all requesting persons, organizations, and news media in compliance with the South Carolina Freedom of Information Act, Section 30-4-80.**

**Call to Order**

**Approval of Agenda**

**Introduction of New Board Members – Grant Brown and Emily Mikell**

**Approval/Disapproval of Absent Board Member(s)**

**Introduction of New Board Administrator – April Koon**

**Approval of October 22, 2015 Board Meeting Minutes \*TAB 1**

**Office of Investigations and Enforcement (OIE) Statistical Report – David Love, Chief of Investigations \*TAB 2**

**Investigative Review Committee (IRC) Report – David Love, Chief of Investigations \*TAB 3**

**Office of Disciplinary Counsel (ODC) Report – Shanika Johnson, ODC Attorney \*TAB 4**

**ABO & NCLE Practical Examination Information– James M. Morris, Esq. and Dr. Roy Ferguson \*TAB 5**

**Advice Counsel Update on Legal Changes \*NHO**

**Motion for Reinstatement of Lapsed License – Janice Burgess \*TAB 6**

**Reports / Information \*TAB 7**

**Administrative Report – April Koon**

- Licensee Totals Report
- S.C. Practical Examination
- Financial Report
- CE Audit \*NHO
- Continuing Education (CE) – Course Approval – International Vision Expo & Conference East 2016
- 2015 Economic Statement Reminder – Due March 30, 2016 \*NHO

**Unfinished Business \*TAB 8**

- Board Member Election Procedures – Keith Hayes term expires 09/13/2016
- Suggestions for Board General Public Member \*NHO

**New Business \*TAB 9**

- Election of Board Officers \*NHO
- Investigative Review Committee Professional Member – Ray Sansbury (current member) \*NHO

*2/11/16  
Left  
vm  
By Cameron - Ask Mr. Sansbury*

3. Clarification for Apprenticeship Renewal – Website Notifications and Renewal Form Approval
4. Definition of Dispensing – Ron Harbert
5. CE Broker – Dylan Sitterle – *Carryover*
6. Elect Media Designee \*NHO
7. Occupational Licensure – Ron Harbert – *Carryover*
8. Eye Care Consumer Protection Law – *Carryover*
9. Delegation of Authority to New Board Administrator – Executive Session \*NHO

#### **Public Comments**

#### **Announcements**

S.C. Practical Examination, June 6, 2016, Kingstree Building, Columbia, S.C.  
Upcoming Board Meeting Date – June 23, 2016, 9:00 a.m., Room 204

#### **Adjournment**

**\*NHO = No Hand Out**

SOUTH CAROLINA BOARD OF EXAMINERS IN OPTICIANRY

SIGN IN SHEET

FEBRUARY 11, 2016

NAME

EMAIL

ORGANIZATION NAME

Janice Burgess

\_\_\_\_\_

N/A

RON HARBERT

CHASUSION@RC

2/11/16

JAY SIMON

\_\_\_\_\_

N/A

ROY R FERGUSON PhD

\_\_\_\_\_

N/A

Jim Morris

jmorris@abo-ncle.org ABO-NCLE

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## Missy Jones

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**From:** Missy Jones  
**Sent:** Thursday, January 14, 2016 10:03 AM  
**To:** 'state@thestate.com'  
**Subject:** South Carolina Board of Opticianry

**Importance:** High

Pursuant to requirements of the Freedom of Information Act 593, this is to advise that the Board of Examiners in Opticianry will hold a Meeting on February 11, 2016, beginning at 9:00 a.m., Kingstree Building of the Synergy Business Park, 110 Centerview Drive, Suite 204, Columbia, SC.

Please do not hesitate to contact me if you have any further questions or concerns.

Thank you!

Missy D. Jones  
Administrative Assistant  
Office of Board Services  
S.C. Department of Labor, Licensing and Regulation  
110 Centerview Drive, Columbia, S.C. 29210  
South Carolina Panel for Dietetics 803-896-4651  
South Carolina Board of Examiners in Opticianry 803-896-4681  
South Carolina Board of Examiners in Optometry 803-896-4679  
Mailing Address: PO Box 11329, Columbia, SC 29211  
Telephone: 803-896-4660  
Fax: 803-896-4719  
Email: [missy.jones@llr.sc.gov](mailto:missy.jones@llr.sc.gov)  
[www.llronline.com](http://www.llronline.com)



***Please complete the Customer Service Satisfaction Survey, it will let my supervisor know if you were satisfied or dissatisfied with the service you received from me. It only takes a minutes to complete. Please ensure to include my name in the survey. Your comments are greatly appreciated. Thanks.***

**Confidentiality Note:** This e-mail, including any attachments, contains privileged & confidential info intended only for the use of the individual or entity named above. If the reader of this e-mail is not the intended recipient or the employee/agent responsible for delivering it to the intended recipient, you are hereby notified that any dissemination or copying of this e-mail, including attachments, is strictly prohibited. If you have received this e-mail message in error, please notify us immediately at 803-896-4660. Thank you.

South Carolina Department of Labor, Licensing and Regulation (SCLLR)  
Board of Examiners in Opticianry  
Meeting Minutes  
October 22, 2015  
110 Centerview Drive, Kingstree Building, Room 202-02  
Columbia, South Carolina

BOARD MEMBERS PRESENT: Daniel B. Gosnell, Chairman  
C. Milton Corley, Jr., Vice Chairman  
James L. Rhodes  
John Hollis Inabinet, Esquire, Public Member

BOARD MEMBER ABSENT: Margie Chapman  
Keith L. Hayes

PUBLIC MEMBER (1): Vacant

SCLLR STAFF PRESENT: Mary Sowell League, Esquire, Office of Advice Counsel  
Angie M. Combs, Administrator  
Missy L. Jones, Administrative Assistant  
For IRC Report:  
Lorie Graham, Investigator, OIE  
For ODC Report:  
Erin Baldwin, Esquire, ODC  
Shanika Johnson, Esquire, ODC

IN ATTENDANCE: Amy Stutsman, President, S.C. Association of Opticians  
Ron Harbert, S.C. Association of Opticians  
Jay Simon, S.C. Association of Opticians  
Michael Tharin  
W. Grant Brown  
Alexandra Patrick, Court Reporter, Creel Court Reporting

Public notice of this meeting was properly posted at the Board office and provided to any requesting persons, organizations, or news media in compliance with Section 30-4-80 of the 1976 South Carolina Code, as amended, relating to the Freedom of Information Act. A quorum was present at all times.

**CALL TO ORDER:** Chairman Gosnell called the meeting to order at 8:58 a.m.

**APPROVAL OF AGENDA:** A **motion** was made by Mr. Rhodes to accept the order of the October 22, 2015 Agenda. The motion was seconded by Mr. Inabinet and carried unanimously.

**APPROVAL / DISAPPROVAL OF ABSENT BOARD MEMBER(S):** A **motion** was made by Mr. Corley to approve the absence of Ms. Chapman and Mr. Hayes. The motion was seconded by Mr. Rhodes and carried unanimously.

**APPROVAL OF MINUTES:** A **motion** was made by Mr. Corley to accept the June 18, 2015 as written. The motion was seconded by Mr. Rhodes and carried unanimously.

**OFFICE OF INVESTIGATIONS AND ENFORCEMENT (OIE) STATISTICAL REPORT:** Ms. Graham, Investigator, provided the OIE Statistical Report; the Board accepted this as information.

**INVESTIGATIVE REVIEW COMMITTEE (IRC) REPORT:** Ms. Graham provided the IRC Report from the September 23, 2015 IRC meeting. It was recommended to dismiss Case #2015-1 and Case #2015-2. A **motion** was made by Mr. Inabinet to accept the IRC dismissal recommendations. The motion was seconded by Mr. Rhodes and carried unanimously.

**OFFICE OF DISCIPLINARY COUNSEL (ODC) REPORT:** Ms. Baldwin reported there are no cases. Ms. Baldwin introduced Ms. Shanika Johnson as the Board's Disciplinary Counsel.

**MOTION FOR REINSTATEMENT OF LAPSED LICENSE – MICHAEL THARIN:** Mr. Tharin was before the Board for a Motion for Reinstatement of his Optician's license. A **motion** was made by Mr. Corley to go into Executive Session to receive legal advice. The motion was seconded by Mr. Rhodes and carried unanimously. A **motion** was made by Mr. Corley to come out of Executive Session. The motion was seconded by Mr. Rhodes and carried unanimously. A **motion** was made by Mr. Inabinet to disapprove Mr. Tharin's application for reinstatement based on failure to comply with Regulation 96-107, specifically subsection (a)(3) regarding the completion of continuing education hours for a 12 month period for each year for which the license has been lapsed. The motion was seconded by Mr. Rhodes and carried unanimously.

**ADVICE COUNSEL UPDATE ON LEGAL CHANGES –** A **motion** was made by Mr. Rhodes to go into Executive Session to received legal advice. The motion was seconded by Mr. Inabinet and carried unanimously. A **motion** was made by Mr. Corley to come out of Executive Session. The motion was seconded by Mr. Rhodes and carried unanimously.

#### **REPORTS / INFORMATION**

Information provided by Ms. Combs concerning the following topics:

- **Licensee Totals Report** – 846 licensed opticians / 697 practice in state, 149 practice out-of-state, 286 licensed contact lens dispensing opticians, and 133 registered apprentices.
- **S.C. Practical Examination** – 14 candidates are currently scheduled to take December 7, 2015 exam.
- **Financial Report** – presented as information.
- **License Renewal** – 85 licensees have not yet renewed, licenses lapse November 1, 2015 if not renewed.
- **Update on Board Member Election** - presented as information.

#### **NEW BUSINESS**

**ABO/NCLE Practical Examination Announcement:** Ms. Combs presented the announcement to the Board as information. The Board requested that Ms. Combs inquire if the ABO/NCLE is now offering this Exam. This item will be carried over to the next Board Meeting.

**Inquiry: a. Delegation of tasks; b. Appropriate supervision; c. Apprentice sponsor:** A **motion** was made by Mr. Inabinet to go in to Executive Session to received legal advice. The motion was seconded by Mr. Rhodes and carried unanimously. A **motion** was made by Mr. Corley to come out of Executive Session. The motion was seconded by Mr. Rhodes and carried unanimously.

**Board Member Election Procedures:** The Board elected to draft policies and guidelines for Board Member elections. The Board also wants an example ballot to be presented at the next Board meeting. A **motion** was made by Mr. Inabinet that for the purpose of electing nominated candidates, the names of all of the candidates will be on one ballot and the electorate will be asked to vote for the number of candidates that match the number of seats available. The motion was seconded by Mr. Rhodes and carried unanimously.

**Finalize 2016 Board Meeting Dates:** A **motion** was made by Mr. Inabinet to accept the meeting dates for 2016 as February 11, 2016, June 23, 2016 and October 6, 2016. The motion was seconded by Mr. Rhodes and carried unanimously.

#### **PUBLIC COMMENTS**

Mr. Grant Brown presented a letter from Mr. Bill Brown. A discussion ensued.

#### **ANNOUNCEMENTS**

The next South Carolina Board Examiners in Opticianry Board Meeting will be held February 11, 2016 in Room 204.

The next South Carolina Practical Examination in Opticianry will be administered December 7, 2015, Kingstree Building, Room 115, Columbia, South Carolina.

#### **ADJOURNMENT**

A **motion** was made by Mr. Corley to adjourn the meeting. The motion was seconded by Mr. Inabinet, and unanimously carried. Mr. Gosnell adjourned the meeting at 11:06 a.m.

*These minutes are a record of the official actions taken by the Board and a summary of the meeting provided by Angie M. Combs, Administrator. Minutes are presented to the Board for final approval.*

**Date: February 11, 2016**

**South Carolina Board of Examiners in  
Opticianry**

**Statistical Board Report**

<b>Case Status (Opticianry cases received from 1/1/15 thru 12/31/15)</b>	<b>Total</b>
<b>Closed (Avg days: 254) (OPTICIANRY)</b>	2
<b>Pending Board Action (Avg days: 58) (OPTICIANRY)</b>	1
<b>Total</b>	<b>3</b>

**Date: February 11, 2016**

**South Carolina Board of Examiners in  
Opticianry**

**IRC Board Case Recommendation Report**

**IRC held on January 20, 2016**

**Dismissal- 1**

**IRC Members**

**Shanika Johnson- Attorney  
Ray Sansbury - IRC Advisor  
Missy Jones- Administrative Assistant  
Adrian Rivera- Investigator  
David Love - Chief Investigator**

<b>Case #</b>	<b>Investigator</b>	<b>Initial Complaint Allegations</b>	<b>IRC Logic</b>
<b>2015-3</b>	<b>Adrian Rivera</b>	<b>Complaint alleges that a retail vision facility within the state is dispensing glasses without a licensed optician on staff.</b>	<b>IRC met on 01/20/2016 and recommended dismissal. RI verified two licensed opticians are on staff.</b>
<b>Total Cases: 1</b>			





AMERICAN BOARD  
OF OPTICIANRY



NATIONAL CONTACT  
LENS EXAMINERS

6506 Loisdale Road, Suite 209  
Springfield, Virginia 22150  
703-719-5800  
[www.abo-ncle.org](http://www.abo-ncle.org)

### MEMORANDUM

FROM: James M. Morris, ABO-NCLE Executive Director  
DATE: July 16, 2015  
SUBJECT: ABO & NCLE Hands-On Practical Examination

ABO & NCLE<sup>†</sup> is very pleased to announce that it has come to an agreement in principle, with Dr. Roy Ferguson, owner of “The Learning Curve,” for the purchase of Dr. Ferguson’s Hands-On Practical currently utilized by various Licensing State Boards governing dispensing opticians. This acquisition will allow, for the very first time, State Licensing Boards to be able to obtain a full spectrum of appropriate competency assessments, whether written, computerized, or in-person, from one Certifying Organization specializing in Certification of Opticians and Contact Lens Technicians.

The ABO and NCLE Computerized Practical Examinations are available to licensing states as an addendum to the existing Basic Examination, for the additional cost of \$75 per applicant per practical examination. The Hands-On Practical Examination will continue to be available at the cost of \$295 per applicant per practical examination. In addition, ABO-NCLE will also be developing a combined Computer/Hands-On Practical Examination, with the cost to be determined after a full analysis and review can be conducted.

The Computerized Practical Examinations include virtual capabilities, combined with “hot spot” technology, video and audio questions, item completion, and numerous other advantages. By incorporating Dr. Ferguson’s Hands-On Practical, ABO-NCLE can now deliver a complete assessment of all skills necessary to determine actual skills and abilities of licensure candidates, and to further protect the health, safety, and welfare of citizens of licensing states. If your state Licensing Board has any questions, or would like to meet with ABO & NCLE to discuss options to protect the health, safety, and welfare of the citizens of your state, please contact James M. Morris, Esq., General Counsel and Executive Director, [jmorris@abo-ncle.org](mailto:jmorris@abo-ncle.org).

<sup>†</sup>ABO-NCLE is the *only* Opticianry Examination Organization in the United States that has received Accreditation as a Certifying Organization, pursuant to the International Organization for Standardization (ISO/IEC 17024:2012). These independent standards provide verification of the viability and credibility of the certification programs utilized for Certification, including candidates for licensure.

**APPLICATION HEARING BEFORE THE SOUTH CAROLINA BOARD OF  
EXAMINERS IN OPTICIANRY**

**February 11, 2016**

**Re: Janice L. Burgess**

1. This hearing is called to order.
2. This is the matter of: **Janice L. Burgess**
3. The purpose of this hearing is to determine whether **Janice L. Burgess** should have her optician's license reinstated.
4. Everyone is reminded that these proceedings are being recorded and that all witnesses must be sworn before they testify. All remarks should be directed to the chair and all responses should be verbal.
5. My name is Daniel Gosnell and I am Chair for the S.C. Board of Examiners in Opticianry. The attorney assigned to advise us during the hearing is Donnell Jennings, Advice Counsel with LLR. Other members of the Board are... .. (*introduce*)
6. Does any member of the Board have reason to recuse themselves from this matter?
7. This hearing will be conducted in accordance with the relevant provisions of the S.C. Code of Laws, the S.C. Code of Regulations, and the South Carolina Administrative Procedures Act.
8. Is the complete application package in our materials? **Yes.**
9. What questions did staff have concerning this application?

*(The following is the anticipated response from staff. You do NOT need to read this but allow staff to present what issues are being brought before the Board)*

***Mr. Chair and other Board members, Ms. Burgess applied for her South Carolina Optician's license in March of 1990. She was granted a license in August of 1990. Ms. Burgess was continually license until October 1, 2013. Ms. Burgess submitted a Reinstatement Application on January 7, 2016. Since it appears that Ms. Burgess' license lapsed more than two***

*years ago, the Board must approve her Reinstatement Application. Because of these issues, this application is before you today.*

*Relevant statutory law includes:*

**SC Code Section 40-38-260 (A)** *which states “A licensed optician or registered apprentice who desires to continue to be licensed or registered in this State annually, on or before the first day of October, shall pay a renewal fee, to be established by the board in regulation and in accordance with Section 40-1-50(D). In case of default in payment of the fee, the person's license or registration is automatically revoked if the board gives the licensee thirty days' notice in writing before the effective date of revocation. Deposit of the notice in the United States Postal Service addressed to the person at the person's last place of residence or business, registered with the board, with postage prepaid, constitutes legal service of the notice. No license or registration may be revoked for nonpayment of the renewal fee if within the thirty-day notice period the person pays a renewal fee and a penalty established by the board in regulation. A person whose license or registration has been revoked for failure to pay the renewal fee may apply to have it reinstated upon payment of all renewal fees and a penalty as established by the board in regulation. If the license or registration has been lapsed for more than two years, the person shall appear before the board, which shall determine if the license or registration should be reinstated and the terms under which the reinstatement is to be made. A person holding a license or registration in South Carolina not practicing in this State who wishes to keep the license or registration current, annually may pay an inactive license or registration fee established by the board in regulation. If the person decides to resume practice in this State, the person shall pay the fee being charged active practitioners in South Carolina at that time.”*

*Relevant Regulatory law includes:*

**Regulation 96-107 (B)** *which states “If a license or an apprenticeship has been lapsed more than two (2) years, the optician or apprentice must: (1)*

*appear before the Board to determine if the license or apprenticeship should be reinstated and the terms under which the reinstatement is to be made; and (2) meet all the qualifications as set forth in Section (A) above.”*

**Regulation 96-107(A) states: "If a license or an apprenticeship lapses, the optician or apprentice must: (1) apply for reinstatement on a form approved by the Board; and (2) pay all fees for each twelve (12) month period during which the license or the apprenticeship was lapsed; and (3) submit proof satisfactory to the Board that the applicant for reinstatement has completed continuing education hours for each twelve (12) month period during which the license or the apprenticeship was lapsed; and (4) pay a fifty (\$50.00) dollar reinstatement fee for reinstatement of the license or the apprenticeship.)**

10. Did staff subpoena any other persons to be here today to answer questions we might have?

11. Is the Applicant present?

**IF YES**

Are you represented by counsel?

**IF YES**

**Counselor**, would you give us your full name and address for the record?

**IF NO**

Are you aware that you have the right to be represented by counsel of your choosing in this hearing?

And you are waiving that right and wish to proceed without an attorney?

12. Ms. Burgess, do you have witnesses that you intend to call to testify on your behalf?

**IF YES**

Would you give us their full names for the record and their relationship to the matter? [*i.e. employer, supervisor, co-worker, teacher*]

13. At this time, all persons who may testify should stand and please state your name(s) for the record. *(This includes the Applicant. Make sure each witness is clearly identified on the record.)* Please raise your right hands to be sworn in. *[Swear them in.]*
14. Ms. Burgess, are you ready to show us why you should be granted a reinstatement of your license despite the questions raised by the Board's administrative staff? *[Applicant is allowed to make a reasonable presentation. Applicant may be interrupted by the chair if she/he gets into irrelevant or repetitive information.]*
15. *Board members may then ask any questions needed to clarify the issues for the Board, being careful to address each question to a witness by name so that the transcript will be readable.*
16. Ms. Burgess, have you any questions to ask any of these witnesses?
17. Ms. Burgess, is there any additional relevant evidence you want us to consider?
18. Thank you.

*[Alternative A]* Your case is submitted and the Board is ready to make a decision.

*[Alternative B]* Your case is submitted and the Board will take it under advisement. Is there a motion to go into executive session to receive legal advice in regards to this application hearing? Second? All those in favor, say "aye." Motion carries. Will everyone please be excused?

**[NOTE: In executive session, no votes of any kind may be taken while in executive session. Come out of executive session before voting on the case.]**

Is there a motion to come out of executive session? Second? All those in favor, say "aye."
19. Is there a motion as to the disposition of this application? *[A motion should be made, seconded, and passed to grant or deny the license application or to grant the license with conditions. Any action must be approved by a majority of the full Board.]*
20. *At the conclusion of the Board's decision, the following statement should be read into the record if the decision is to deny the application, or grant the application with conditions:*

**prepare a document that more fully expresses our conclusions in the appropriate language and format the Board has traditionally used and will be the final order in this matter.**

**MS. BURGESS, THANK YOU FOR YOUR PRESENTATION AND ATTENDANCE HERE TODAY.**

**BOARD MEMBERS, THANK YOU FOR YOUR ATTENTION AND THOUGHTFUL DELIBERATION.**

**THIS CONCLUDES THE HEARING.**



South Carolina Department of Labor, Licensing and Regulation  
**South Carolina of Examiners in Opticianry**  
 P.O. Box 11320 • Columbia, SC 20211  
 Phone: 803-896-4681 Fax: 803-896-4719  
[www.llr.state.sc.us/POL/Opticians/](http://www.llr.state.sc.us/POL/Opticians/)

**For Office Use Only**  
 Check No. \_\_\_\_\_  
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**Reinstatement Application**  
**PLEASE READ THE INSTRUCTIONS VERY CAREFULLY**

Name: Janice Burgess License #: 554

**Reinstatement Instructions**

1. Per South Carolina Law if your license or an apprenticeship has been lapsed more than two (2) years, you will need to appear before the Board at a reinstatement hearing to determine reinstatement eligibility. Please complete and submit this Reinstatement Application, provide proof of attending required continuing education, and pay past renewal and reinstatement fees. Reinstatement hearings are conducted at Board meetings; upon receipt of your application you will be contacted concerning hearing information.
2. Per South Carolina Law if your license or an apprenticeship has been lapsed less than two (2) years, you will need to complete and submit this Reinstatement Application, provide proof of attending required continuing education, and pay past renewal and reinstatement fees.
3. Please contact Missy Jones, [missy.jones@llr.sc.gov](mailto:missy.jones@llr.sc.gov), for an amount of the fees due and amount of Continuing Education due at the time of this Reinstatement.

Please contact the Board office at (803) 896-4681 or [missy.jones@llr.sc.gov](mailto:missy.jones@llr.sc.gov) if you have any questions or visit our webpage at [www.llr.state.sc.us/POL/Opticians/](http://www.llr.state.sc.us/POL/Opticians/)

Home Address	Work Place Name and Address	Mailing Address
107 Thorn Ridge Lane	Americas Best Contact & Eyeglass	107 Thorn Ridge Lane
Palmer, SC 29969	104 Station Drive Anderson, SC 29621	Palmer, SC 29969
864-221-9461	864-332-4840	
Telephone:	Telephone:	Telephone:
Email: _____		

Congressional District 1 2 3 4 5 6 (circle)

**Continuing Education**  
 Do you have documentation of your ABO approved Continuing Education?  Yes  No

If yes, please provide how many hours, 0 Hours

**IF YOU ANSWER "YES" TO A QUESTION BELOW, A DETAILED LETTER OF EXPLANATION ALONG WITH THE DOCUMENTATION INDICATED AFTER EACH QUESTION MUST BE SUBMITTED.**

1. Since you last renewed your license, have you been convicted or pleaded nolo contendere to any crime? If you do not have documentation, request a criminal records check be sent by the appropriate entity directly to the Board.  Yes  No
2. Since you last renewed your license, have you had a license denied, restricted or disciplined by any other licensing board or national certifying body? Send a request to the board/body where your disciplinary action occurred for a final order to be sent directly to the Panel.  Yes  No
3. Since you last renewed your license, have you had any mental, emotional, and/or physical condition, including alcohol or other substance abuse that may presently interfere with your ability to competently and safely perform the essential functions involved in this profession?  Yes  No
4. Since you last renewed your license, have you been addicted to, or used in excess, any drug or chemical substance including alcohol, or been treated for a drug or alcohol addiction or participated in a rehabilitation program?  Yes  No
5. Has there been any change in the status of your lawful presence in the United States since initial licensure? (e.g. naturalization, received a renewed permanent resident card)  Yes  No

I HEREBY swear/affirm I have read all questions on this renewal application and have answered truthfully, accurately, and completely. I hereby acknowledge that failure to answer these questions truthfully, accurately and completely shall constitute cause for the initiation of disciplinary action against my South Carolina license.

Janice Burgess  
Signature

1-7-16  
Date

**PRIVACY DISCLOSURE:**

*South Carolina law requires that every individual who applies for an occupational or professional license provide a social security number for use in the establishment, enforcement and collection of child support obligations and for reporting to certain databanks established by law. Failure to provide your social security number for these mandatory purposes will result in the denial of your licensure application. Social security numbers may also be disclosed to other governmental regulatory agencies and for identification purposes to testing providers and organizations involved in professional regulation. Your social security number will not be released for any other purpose not provided for by law.*

Other personal information collected by the Department for the licensing boards it administers is limited to such personal information as is necessary to fulfill a legitimate public purpose. The South Carolina Freedom of Information Act ensures that the public has a right to access appropriate records and information possessed by a government agency. Therefore, some personal information on the application may be subject to public scrutiny or release. The Department collects and disseminates personal information in compliance with The South Carolina Freedom of Information Act, the South Carolina Family Privacy Protection Act, and other applicable privacy laws and regulations. Additionally, the Department shares certain information on the application with other governmental agencies for various governmental purposes, including research and statistical services.

A copy of the Practice Act and Regulations governing the practice of Opticianry in South Carolina can be obtained from the website at [www.lh.state.sc.us/POL/Opticians/](http://www.lh.state.sc.us/POL/Opticians/) under Laws / Policies.

**Reports/Information Tab 7 a & b**

**Administrative Report – April Koon**

**a. Licensee Totals**

Total of all licensees –

Instate licensee total –

Out-of-state licensee total –

Total of all apprentices –

**b. S.C. Practical Examination**

June 6, 2016 Exam total –

January 6, 2016

Ms. Angela Combs  
Board Administrator  
South Carolina Board of Examiners in Opticianry  
P.O. Box 11329  
Columbia, SC 29211-1329

Dear Ms. Combs,

International Vision Expo & Conference East 2016 will be held at the Javits Center in New York, NY from April 14 – 17, 2016. The Vision Council and Reed Elsevier (Reed Exhibitions) organize this joint venture.

I have enclosed course descriptions and speaker credentials for your review and approval. I am hopeful that you will see the educational value and offer your approval of the education program. I am requesting approval of the entire Opticianry program with 163 hours of continuing education.

If you require additional information, please do not hesitate to contact me directly. Thank you for your consideration.

Sincerely,



Leigh Mann  
Conference and Content Manager  
International Vision Expo & Conference  
Phone: 203-840-5452  
Email: [lmann@reedexpo.com](mailto:lmann@reedexpo.com)

Enclosures



Opticianry Course Descriptions – International Vision Expo East 2016 Conference Program

10L1

**GCLF State of the Contact Lens Industry in 2016**

7:00 AM – 8:00 AM 1 Hour

Scot Morris, OD; Robert Warner; Jerry Warner, Jim Kirchner, Mark McKenna

This course is an overview of the state of the contact lens industry. Join us as our panel of clinical and industry experts weigh in on where contacts are in 2016, the challenges, and the future innovations in contact lenses.

10L2

**GCLF The Contact Lens Trilogy - Specialty Areas To Boost Your Contact Lens Practice**

9:00 AM – 11:00 AM 2 Hours

S. Barry Eiden, OD; Louise Sclafani, OD; Jeffrey Cooper, OD; Joe Barr, OD

- Presbyopia management with contact lenses
- Contact lens treatment of the irregular cornea
- Management of myopia progression with contact lenses
- Management of ocular disfigurement with contact lenses (prosthetic CLs)

10L3

**GCLF Contact Lens Eye Care From A Patient's Perspective**

11:15 AM – 12:15 PM 1 Hour

Louise Sclafani, OD; S. Barry Eiden, OD

- Have 3-4 patients who are frustrated, not satisfied in habitual CL wear
  1. Standard disposable SCL wearer
  2. New or habitual keratoconic patient
  3. Allergy or dry eye CL wearer or GP normal cornea lens wearer
  4. CL wearing presbyope (monovision or SV CL wearer)

10L4

**Ocular Wellness and the Ocular Surface: Where Do We Go From Here?**

1:30 PM – 2:30 PM 1 Hour

Jack Schaeffer, OD; Paul Karpecki, OD; Marc Bloomenstein, OD

30 Key Optometric leaders in dry eye developed a basic plan to begin a dry eye strategy for all Optometrists. The course will walk you through all the processes needed to develop a strategy in your office. We will cover the doctor and staff responsibilities. We will go over basic diagnostic and treatment modalities.

11B1

**Tips and Tricks to Better Purchasing**

1:30 PM – 3:30 PM 2 Hours

Carol Norbeck

Inventory is the most essential and influential part of every business. The product in your office creates your image and your profit margin. Buying today can not be a personal decision. Learn the basics of standard business practices in purchasing. Learn "Open to Buy" systems and tracking systems for inventory turns. Learn how to position your purchases to offer options to meet your entire patient's needs. Successful inventory control creates improved cash flow. Create your "Brand" while creating profits and patient satisfaction.

11B3

**How To Measure and Improve Team Productivity**

1:30 PM – 3:30 PM

2 Hours

Jerry Hayes, OD

Yes, your team is busy, but how productive are they compared to other practices of the same size? Designed for ODs in traditional dispensing practice, this presentation will teach you how to measure both doctor and staff productivity and benchmark your practice against industry norms. You'll learn the answers to three important questions; "How much staff do I really need", "How much should I pay my team", and "How do I hold my employees accountable"?

11L1

**Decision Making Process for Multifocal Contact Lens Prescribing**

1:30 PM – 3:30 PM

2 Hours

Thomas Quinn, OD; Melissa Barnett, OD

Today's wide array of multifocal contact lens options offer much promise for the presbyopic contact lens wearer. Learn a methodical approach to matching lens design to patient needs and ocular characteristics.

11O1

**Practical Applications for Spectacle Lens Formulas**

1:30 PM – 3:30 PM

2 Hours

Edward De Gennaro, ABOM

Optical formulas are an important part of the knowledge base opticians and technicians must learn in order to be competent practitioners. Too often however, formulas are learned with little emphasis on how they work and the practical things you can learn from using the formula in various ways. This course looks at a number of optical formulas and explores how each one works, what it can tell you and presents useful and meaningful results from each one. This course will answer questions such as how much pantoscopic tilt is too much, how much power error is induced if my vertex distance measurement is off by 2 millimeters, why do I have to turn a bifocal lens around to properly read the add power, and more. This course could be the best two hours you've been in a seminar in years.

11O2

**Tips for Working With Higher Powered and Larger Spectacle Lenses**

1:30 PM – 3:30 PM

2 Hours

Laurie Pierce, LDO, FNAO, ABOM

As frames fashions increase in size we must review the optical concepts that ensue. The majority of optical aberrations occur in the periphery of the lens. When we dispense smaller eyesizes, this is not as urgent. However, as eyesizes increase, so do optical aberrations. Additionally, as lenses increase in power, additional optical concepts must be applied. This course will focus on the major optical aberrations and prismatic effects that occur in larger and stronger lenses, and their optical solutions.

10L5

**Ocular Surface Disease: Developing a Strategy for Diagnosis and Treatment of OSD**

3:45 PM – 5:45 PM

2 Hours

Jack Schaeffer, OD; Paul Karpecki, OD; Marc Bloomenstein, OD

This course will cover the advanced diagnostic and treatment strategies for the dry eye specialty practice. We will use case studies and a rapid fire approach to cover the majority of diagnostic and treatment strategies. We will also cover the wellness initiative and its relation to ocular surface disease prevention.

12B1

**Overcoming Patient Objections Captures More Revenue**

3:45 PM – 4:45 PM

1 Hour

Mark Hinton, ABO

Attendees will learn how connecting personally through a patient's "Preferred Name" relaxes the patient, leading to trust, quickly and naturally, Understand how the "Feel, Felt, Found" method of overcoming objections and pushback more often reverses negative patient perception to service, product or price, leading to increased patient loyalty, sales of needed services and products, provide for an improved patient experience.

12B2

**A System For Obtaining Loyal Patients**

3:45 PM – 4:45 PM

1 Hour

Peter Shaw-McMinn, OD

Doctors seem to want loyal patients, who do what they say, obtain products and services from them and return on a regular basis. This course presents a system that can be adapted to any practice to promote loyalty in their patient population. Office policies and procedures, scripts and the role of staff and the doctor will be covered. A typical patient flow will be presented that encourages patient loyalty.

12B3

**Individual Choices - The Guide To Multiple Pair Sales**

3:45 PM – 5:45 PM

2 Hours

Carol Norbeck

Multiple Pair selling begins with superior customer care. Learn how to discuss and identify your patient's individual needs. Understand the differences between function, fashion and image. Learn how self imposed glass ceilings limit you and your patient. Understand the paradigm shift necessary to not unconsciously limit your patient. Learn how to communicate the concept of multiple pairs positively. This discussion is relevant to lenses, frames, sunglasses and contact lens.

12L1

**Anterior Segment Imaging for the Contact Lens Practice**

3:45 PM – 5:45 PM

2 Hours

William Tullo, OD; S. Barry Eiden, OD

New advanced technologies allow the contact lens practitioner to better diagnose and manage a variety of challenging anterior segment conditions. This course will review the application of technologies such as Placido based corneal topography, anterior segment Scheimpflug tomography, anterior segment optical coherence tomography, corneal-scleral profile imaging and others that allow the practitioner to provide more accurate diagnosis and more successful management of patients with corneal and other anterior segment diseases. We will share how these technologies are allowing us to dramatically increase our success in the design and fitting of new vaulting design contact lenses.

12O1

**Understanding and Recommending Office, Anti-Fatigue and Close Environment Lenses**

3:45 PM – 4:45 PM

1 Hour

Raymond Dennis; Dave Ziegler, OD

Most Americans spend more time working than participating in any other activity and good vision plays a critical role in job performance. This course is designed to help eyecare professionals to analyze specific occupational and specialized visual needs for each patient, and how to select lens options that will help meet those needs. Discussion will include specialized designs and freeform products that are new to the marketplace.

12O2

**How Difficult Eyewear Problems Were Solved: Five Case Studies**

3:45 PM – 4:45 PM

1 Hour

Laurie Pierce, LDO, FNAO, ABOM

There is nothing more frustrating (and expensive!) than when a patient is scheduled to see the doctor for a recheck when the problem was in the eyeglasses needing a specific adjustment or

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compensation. We will look at five case studies with optical challenges and show the optical solutions. Using the optical approach to excellence will help eliminate wasted time and yield the best optical outcome for our patients/clients.

13B1

### **Fascinate the Frame and Sell More Multiple Pairs**

5:00 PM – 6:00 PM

1 Hour

Mark Hinton, ABO

Fascinate the frame takes the attendee on a quest of understanding how to choose the best frame for prescription and then move the eyewear consumer from frame fascination to frame obsession using buying words and phrases that psychologically captivate the consumer, moving them from money-conscious to fashion conscious; Social Science research indicates people buy with their emotional mind and justify with logic, exciting the brain center, which activates retail buying pleasure zones and “permits” the consumer to open to the possibilities of fashioning a wardrobe of eyewear.

13B2

### **The Role of the Receptionist, Technician, Doctor and Dispensing Optician**

5:00 PM – 6:00 PM

1 Hour

Peter Shaw-McMinn, OD

Often our patients have 30 seconds at the end of the office visit to decide whether to spend a significant amount of their hard-earned money. This course will review opportunities throughout the exam visit to educate the patient about eyewear so that they will already have decided to purchase it by the time they reach the optical.

13O1

### **The Physiological and Optical Problems and Solutions of the Elderly Eye**

5:00 PM – 6:00 PM

1 Hour

Raymond Dennis

The demographics of the elderly has changed over the years...today's seniors are living longer, enjoying active lifestyles, and have more discretionary income than ever before. While they are keeping their bodies younger, they cannot control the changes occurring in their eyes, which greatly affect their vision. Today's new lens options are a perfect match for the elderly...we can do much more to enhance their eyesight, given new optical technologies available to us.

13O2

### **Spectacle Lens Customization - How Personal Is Your Progressive?**

5:00 PM – 6:00 PM

1 Hour

Edward De Gennaro, ABOM

The latest and most advancement in digital free-form progressive lenses is customization. The more customized they are for the wearer; the more personalized and ideal they are for the wearer. There are a number of very good customization techniques and some are unique to particular brands and lenses. How personal are the free-form progressives you use? This session will explore the most popular customization techniques and explain their value for the wearer. Understanding these customization methods will help you buy lenses more strategically and recommend them more precisely for wearers.

21B1

**The Elusive Handoff: Capture More Sales**

7:15 AM – 8:15 AM

1 Hour

Mark Hinton, ABO

Develop a modern hand-off in order to capture, engage and convert more eyewear purchases in your optical. You will Learn the secrets, words and phrases that patients need to hear in order to make the best decisions regarding eye health. In less than 2 minutes lead the patient to understand clearly your "prescribed eyewear treatment plan" and why your "protect and prevent" plan makes sense.

21B2

**Everybody Loves Warby (and Why ECPs Should too)**

7:15 AM – 8:15 AM

1 Hour

David Friedfeld

Warby Parker is a fantastic retailer whose product selection, pricing, knowledge of consumers, and online expertise is changing the way eyewear is being dispensed. With a dream and a group of young entrepreneurial types, this company debuted on the eyewear scene in 2010 and since then has raised over \$130 million, employed over 500 people, and opened both an online business and retail business – ALL without managed care, license branded product, and OD's as the backbone of their business. Come learn what you can be doing right in your practice if you want to stay relevant in 2015 and thereafter.

21O1

**How To Determine the Right Tints and Coatings for a Patient**

7:15 AM – 8:15 AM

1 Hour

Raymond Dennis

This course is designed to introduce the learner to a variety of lens coatings and coating processes. Particular attention will be paid to anti-reflective coatings, ultraviolet protective coatings, anti-fog, abrasion resistant coatings, mirror coatings, lens edge coatings and the use of tints to enhance vision in sports and other activities. Additional discussion will include relating product features and benefits to increasing sales of these products.

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2102

**Clinical Ocular Concepts for Opticians, Technicians and Ancillary Staff**

7:15 AM – 9:15 AM

2 Hours

Vincent Young, MD

This course is an overview of ocular anatomy, ophthalmic terminology, and clinical scenarios where understanding of these concepts allows for proper triage and management of common problems that arise in patients. We will attempt to provide broad knowledge that is critical to all staff working in an ophthalmic setting. The course will be organized into sections of the eye and surrounding tissues, from front to back, with examples of clinical problems that occur within each section.

22B1

**Show Me the Money! Reduce Time / Add Revenue!**

8:30 AM – 9:30 AM

1 Hour

Mark Hinton, ABO

Explore how to simplify your lens pricing packages. The use of calculators, itemized co-payments, "add-ons" and delaying the price frustrates and confuses your patient/consumer; leading to a less than satisfactory experience, sticker shock, and buyer's remorse.

22B2

**Implement Disney Management Into Your Practice**

8:30 AM – 9:30 AM

1 Hour

Peter Shaw-McMinn, OD

This course shows how to implement Disney Management in your office. The Quality Service Cycle will be explained with practical examples of how to implement in your practice Guestology, Service Theme, Service Standards, Delivery Systems and Integration. This course shows you how to utilize practice demographic information, create a usable service theme, implement service standards, as well as, how to utilize staff, setting and policies to deliver the service theme. Most importantly, this course shows you how to integrate this all together to enhance service and increase revenue.

22B3

**Tips from the Trenches: A Practice Administrator Shares Secrets to Success**

8:30 AM – 9:30 AM

1 Hour

Mark Johnson, LDO, ABO, NCLE

Large practice administration shares how they measure success when it comes to growth and practice sustainability. This course will share bench marks, what metrics are evaluated, how markets are analyzed and how to communicate to the ownership. Also, discuss brand identity, culture, marketing and staff morale/motivation.

22B4

**Secrets of Hiring Top Talent When Your Magic Wand Is Broken**

8:30 AM – 11:30 AM

3 Hours

Daniel Abramson

Hiring is your most important job! There are 3 keys to building a top performing Real Estate company... selection, selection, & selection! You hire people "as is" and so you better be sure to hire the right people for the right job. In many cases, we hire for skills and then fire on "drama" and personality! The critical insight, is to decode what really makes your star performers shine and then hire more people with those same qualities. You'll leave this session with a step by step road map of time-tested best practices that you can start using immediately.

22B5

**Frames: The Facts, The Factories, and The Fashion**

8:30 AM – 9:30 AM

1 Hour

Mike Hundert

Understand all the factors that are considered and production steps taken to get a frame from a concept or design through the factory and onto your frame displays. You'll acquire valuable insight including how Brand DNA, colors of the season, materials, quality and compliance standards, testing, and country of origin play a role in eyewear manufacturing. Understanding these nuisances will help you make informed decisions in the inventory buying process and ultimately curate the appropriate collections for your practice and your patients.

22O1

**Blue Light and Digital Eye Strain - Educating Patients and Providing Solutions**

8:30 AM – 9:30 AM

1 Hour

Michael Della Pesca, ABOM

Recent studies have shown that cumulative blue light exposure from digital devices can lead to both short term and long term problems for users. Eye care professionals now have several product options to help alleviate some of the blue light exposure patients are subjected too and this course will explore statistical information as well as talking points to help educate patients about their option and the importance of protecting their eyes from these damaging rays.

23B1

**Communicating Value: How Do You and Your Patient Differentiate \$99 Eyewear from \$999 Eyewear?**

9:45 AM – 10:45 AM

1 Hour

Laurie Pierce, LDO, ABOM, NCLC

Every day we experience the challenge and opportunity to communicate value differences in frames and lenses with our clientele. How do we communicate the differences in value in a \$79.00 frame and a \$479.00 frame? How about a \$200.00 PAL and a \$600.00 PAL? This course

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will outline the variables of frame and lens construction and design, including materials used and methods of fabrication. Samples will be demonstrated showing the details in construction and design that can make all of the difference in the value of the frames and lenses. Additionally, we will discuss the various options in lenses (SV Freeform, conventional PALs/Freeform PALs and specialty lenses). Helpful tips in communicating frame and lens features and benefits will round out this session. Don't play a guessing game...present the differences in eyewear with confidence, and watch your business grow.

23B2

### **The Power of Promotions**

9:45 AM – 10:45 AM

1 Hour

Bill Gerber

When done right, promotions are a great way to attract new patients and boost sales. In this presentation, you will learn how to plan and host a highly profitable trunk show, generate additional revenues and move inventory by hosting a frame sale. You will learn how to determine whether incentives for multiple pair purchases are right for your practice and how to create a plan for implementation that will deliver results.

23B5

### **Best of OD's on Facebook: Practice Management Pearls**

9:45 AM – 10:45 AM

1 Hour

Moderator: Gary Gerber, OD; Panelists: April Jasper, OD; Neil Gailmard, OD; Mark Wright, OD

You will be introduced to some of the most compelling practice management scenarios colleagues are discussing in the industry's largest and most popular community "ODs on facebook". Cases will be presented as written, discussed by the presenters and questions posed by the audience. You will gain an understanding of how colleagues use social media to assist in practice management decisions, with the goal of ultimately improving their practices and profitability.

23L1

### **Take the Contact Lens Challenge - Fit the Unusual Eye**

9:45 AM – 11:45 AM

2 Hours

S. Barry Eiden, OD; Louise Sclafani, OD

The presenters will share their cumulative experiences in managing some of the most interesting and challenging specialty contact lens cases. A grand rounds of specialty contact lenses will demonstrate how advanced lens designs and diagnostic technologies are used to manage keratoconus, ocular surface disease, post surgical and post trauma eyes, presbyopia, and other complex conditions. Take creative solutions back to your practice after attending this course.

2301

**The Future In Focus: Eyecare Technology That's Emerging**

9:45 AM – 10:45 AM

1 Hour

Edward De Gennaro, ABOM; Paul Karpecki, OD; Pia Taveras; Hal Wilson; Richard Clompus, OD

As new technologies continue to be developed by industry, the world of eyecare is rapidly being exposed to a number of new, exciting, and in some cases paradigm shifting products and procedures. These technologies have the potential for changing what ECPs do and how they do it, as well as what the public receives from us and how they receive it. The best way to be ready for these changes is to be aware of them. This course focuses on several emerging technologies and the potential impacts they might have on the eyecare delivery system. The panel of experts will explore the possible implications for consumers, optical offices and consumers.

2302

**Low Vision Dispensing for Opticians and Techs**

9:45 AM – 10:45 AM

1 Hour

Joseph Buttazzoni

This course is for the optician/technician/assistant who wants to start or expand his or her ability to provide low vision care. There will be a review of vision aids that will address a number of visual goals, needs, and tasks. New concepts are presented regarding how to think about low vision and provide tools to make dispensing low vision products and services seamless and smooth.

24B1

**Know Your Market Area**

11:00 AM – 12:00 PM

1 Hour

Mark Johnson, LDO, ABO, NCLE

This course will allow the practice to better analyze their market area to identify opportunities for improvement and/or growth. The practice will have a better understanding how to identify the appropriate market position along with better understanding of competitors, community and vision insurance in the same market area.

24B2

**The New Rules of Optical Retailing**

11:00 AM – 12:00 PM

1 Hour

Bill Gerber

Bill Gerber, noted optical merchandising guru, will share the new rules that successful practices and retailers follow to a tee. In this informative and entertaining presentation, he will expand on what's wrong with most optical presentations and offer specific turnkey solutions for fixing the merchandising problems standing in the way of higher sales and patient satisfaction.

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24B3

**How to Implement the Right Warranty to Increase Sales and Patient Satisfaction**

11:00 AM – 12:00 PM

1 Hour

Rebecca Johnson

Consumer expectation of after sale services continue to soar and our ability to differentiate ourselves from commercial environments and on line access is crucial. During this course you will have the opportunity to share and learn new strategies as we strive to create a new experience for our patients.

24B5

**Creating a Culture of Excellence**

11:00 AM – 12:00 PM

1 Hour

Dave Ziegler, OD

Companies who have achieved excellence are different than their competition by having a defined purpose and effective methods that allow them to accomplish their goals. This class will share perspectives on leadership, how your core principles are reflected in your vision statement, and how to create a great staff. You will learn how to develop a vision statement for your practice through the understanding of the five characteristics of all businesses, determine the core principles of a successful practice, customer complaint resolution, problem solving, and how to build a great staff.

24B6

**Common Sense Practice Building That Is Not Commonly Used**

11:00 AM – 12:00 PM

1 Hour

Gary Gerber, OD

You might expect that marketing to new movers would be a good idea. After all, if someone is new in your town, they need a new eye doctor! What about saving money on marketing by relying on email vs. snail mail? No postage or printing costs sounds awesome! Why wouldn't you offer credit cards to promote higher sales? That's brilliant! As it turns out – all of these seemingly common sense ideas are actually NOT terribly smart when it comes to practice building. Learn why and also learn many other so called "common sense" practice building ideas that really require closer scrutiny. Finally, learn the thought process to evaluate things you're doing in your own practice that might need to be discontinued or augmented, based on this new view of "common sense"!

24O1

**Designing and Crafting Optimal Solutions for Challenging Rx's**

11:00 AM – 12:00 PM

1 Hour

Raymond Dennis

This course is designed to help the learner to identify situations where the dispenser should be making specific recommendations of lens styles and materials to provide patients with the optimal eyeglass designs to meet their visual and physical needs. Specific attention will be paid to the problems associated with strong prescriptions, learning to minimize thickness and weight and how to avoid exposing the patient to problems such as physical discomfort, magnification/minification, loss of binocularity and the impact of non-prescribed prismatic effect.

24O2

**What's the Future of Online Refraction?**

11:00 AM – 12:00 PM

1 Hour

Edward De Gennaro, ABOM; Hal Wilson; Vitor Pamplona; Aaron Dallek

The equipment and technology used to refract the human eye hasn't changed much in over 50 years. With the advent of digital technology in the ophthalmic equipment space, companies are creating alternatives to how refractions are performed and how the process is delivered using the Internet, smartphones and other technologies. While these innovations represent new thinking and new ways to perform a routine test, their impact may go much further than simply providing alternative refraction processes and may be a disruptive influence in how people obtain a refraction. This course explores the latest innovations in alternative refraction technologies. In addition, the panel of experts will discuss the potential impacts these technologies may have for ECPs, patients and consumers.

20B1

**The Ritz Carlton Presents: Excellence in the Patient Experience**

12:30 PM – 2:30 PM

2 Hours

Joseph Quitoni

By exploring the award-winning business practices of The Ritz-Carlton, you'll discover how a service excellence culture results in a patient-centric environment, through engaged employees. You'll be guided through The Ritz-Carlton Gold Standards, the foundation of our iconic, global brand. You'll also visit our key processes such as on-boarding, employee empowerment, and patient empowerment that lead to service excellence and sustainable success.

25B1

**Selling Smart By Understanding the Four Personality Types**

2:45 PM – 4:45 PM

2 Hours

Daniel Abramson

Patients today are savvy and sophisticated and the old mundane 'one-size-fits-all' sales & communication approach is losing its effectiveness in today's competitive and cluttered marketplace. During this interactive session, you'll take part in a dramatic self-scoring personality test and then discuss sales and persuasive techniques for dealing with the 4

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personality types. You'll learn how to sell to your patients the way they are comfortable buying...NOT the way you are comfortable selling. You'll leave this session with some 'goof-proof' tips and strategies to help you close more deals and build relationships that 'stay stuck'. This program is fast paced, interactive, humbling, and fun? Don't miss this one.

25B2

### **Frame Buyer's Panel**

2:45 PM – 4:45 PM

2 Hours

Moderator: Stephanie De Long; Panelists: Carol Norbeck; Colleen Hannegan; Meera Dua

This two-hour panel features three experts, each with over 20 years of optical buying experience. With backgrounds in buying for everything from boutiques and small chains to optometric and ophthalmology dispensaries, our panelists will address buying from every vantage point. Bring your questions and let us address your challenges in this open and frank discussion about buying in optical.

25B4

### **How to Become the Destination Location**

2:45 PM – 4:45 PM

2 Hours

Rebecca Johnson, Jay Binkowitz

Why would a patient drive 20 minutes out of their way to come to your practice? There is a difference between "being nice" and the ability to delight a patient. In this workshop, the attendees will collaborate in groups to come up with reasons that make a practice the perfect destination location.

25B5

### **The Greatest Social Media Marketing Course Ever**

2:45 PM – 4:45 PM

2 Hours

Alan Glazier, OD

The Internet is a key driver of business for eyecare professionals. Methods to attract new business and build loyalty and engagement with current patients via this medium continues to evolve as the internet itself evolves. This course is an update on marketing trends on the internet and social media and how you can apply them to drive customers to your eye care business.

25L1

### **The Basics of Scleral Lens Fitting - It's as Easy as 1, 2, 3**

2:45 PM – 4:45 PM

2 Hours

Melissa Barnett, OD

This course will describe major conditions for which scleral lenses are prescribed with a combination of reviews of published literature and descriptions of cases that illustrate the utility

of scleral lenses in the management of these conditions. In addition, scleral lens fitting and troubleshooting pearls will be discussed.

2501

**A Checklist for Managing Spectacle Lens Complaints**

2:45 PM – 4:45 PM

2 Hours

Raymond Dennis

This course will help the learner to identify and rectify the most common problems that patients experience with their eyeglasses. The problems discussed are generally associated with doctor/refractionist errors, failure to meet ANSI standards, problems associated with choice of lens style, lens materials, improper facial measurements, fitting heights, frame fitting errors, improper vertex, pantoscopic tilt and face form tilt. Further discussion will include how to minimize the negative effects of first-time bifocal or progressive lens wear and problems associated with adaptation.

2502

**Basic Principles of Refraction for Opticians and Technicians**

2:45 PM – 4:45 PM

2 Hours

Laurie Pierce, LDO, FNAO, ABOM

This course brings together the theories of refraction and how the refracting procedures tie in with the patients Rx. We will begin with a brief overview of the objective refraction process, comparing retinoscopy and vergences of the eye. Participants will compare refractive errors with vergences and relate this to the objective refractive process. Continuing with the subjective refraction, we will look at the concept of visual resolution and the order of cylinder refinement. Duochrome, Binocular Balance and measuring Add Power will round out the course.

26B1

**How To Deliver Efficient and Effective Patient Experiences**

5:00 PM – 6:00 PM

1 Hour

Joy Gibb, ABOC

There are times when we feel pressured to keep up with patient flow and make sure the patients are seen in a timely manner. While it's important to make sure the patients have a timely experience in your office, it's also important that they still have a personal experience in your office. This course will explore techniques to make sure every patient in your office has an experience that helps you connect to them on a personal level while meeting all their needs.

26B2

**Review-Based Staff Compensation Strategies and Benchmarks**

5:00 PM – 6:00 PM

1 Hour

Rebecca Johnson

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Entitlement raises do nothing to motivate employees, and can have just the opposite effect. This course demonstrates how a compensation plan based on performance increases employee morale, productivity and takes the emotion out of the review process.

26B3

### **Lessons Learned from a Service Giant: How to Set the Bar High and Reach It**

5:00 PM – 6:00 PM

1 Hour

Mark Johnson, LDO, ABO, NCLE

Well known fortune 500 companies believe the sky is the limit and then go for it. Learn how they position their teams to reach their goals. This course will discuss team recruitment, understanding the brand promise, creating the a culture of excellence, mentoring and team motivation. Also share successfully proven tips on marketing and quality control.

26B4

### **Makeovers For Your Optical Dispensary That Improve Profits**

5:00 PM – 6:00 PM

1 Hour

Dave Ziegler, OD; Richard Winig

Today's consumer is more savvy and sophisticated than ever and expects a retail experience with beautiful displays and attractive merchandising that showcase your products. Your optical dispensary must be viewed as a store that people enjoy shopping at, just like any other shopping experience they have. This class shows you how to elevate your game by upgrading your current space and teaches you how to effectively display eye wear.

26B5

### **How Culture Eats Strategy for Lunch & How To Improve Yours**

5:00 PM – 6:00 PM

1 Hour

Gary Gerber, OD

The best strategies in the world will fail if your team/staff doesn't believe in them. When that happens, "strategy by default" is the result. That leads to stagnation and loss of profits. Learn how to easily create a culture that your team will WANT TO rally around and support - one that supports your goals, values and ultimately, strategy! Unlike other "leadership training" courses, this one delivers impactful and actionable steps you can put in place right away with no cost and maximum results!

26L1

### **Smart Contact Lens and Other Future Eye Care Technology**

5:00 PM – 6:00 PM

1 Hour

Joe Rappon

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This course will review the evolution of technology that has led to the development of smart devices, such as contact lenses with embedded electronics. The challenges with and the opportunities for these smart ophthalmic devices will be discussed.

26O1

### **Challenging Pediatric Eyewear Fitting Situations**

5:00 PM – 6:00 PM

1 Hour

Diane Drake, LDO, ABOM, FCLSA

This course will present information regarding the unique skills needed to dispense eyewear to children. The course will focus on toddlers and children as well as tweens and teens. Identifying specific needs in fit, fashion and function for eyewear on children will be presented, including proper measurements, and anatomical considerations. This session will also present the importance of communicating with children and their parents, and dispensing eyewear. Statistics will be presented on children's visual needs. It will begin with an ocular embryology and vision disorders of children.

26O2

### **Visualizing the Finished Eyeglasses**

5:00 PM – 6:00 PM

1 Hour

Edward De Gennaro, ABOM

There is a skill successful dispensers have, a skill that helps them see a mental picture of the patient's final eyeglasses just from looking at the patient's prescription, their face shape and coloring, and asking a few questions. They envision things like the lens' thickness, the best frame shape and color for the patient, what type of visual performance the patient will obtain and a host of other things. Learning to see this visual image is essential to becoming a top notch dispensing professional. This seminar will teach you the things you need to know to develop this skill and improve your abilities as a top notch dispenser.

31B1

### **Must Have Eyewear Fashion Trends for 2016**

8:30 AM – 9:30 AM

1 Hour

Joy Gibb, ABOC

The runways of Paris and Fashion Week in New York are huge indicators of the fashion that lies ahead for the year. The influence of those fashion trends can be seen in not just clothing, but also eyewear. If you want to know what you will be seeing on frame boards in the near future, this class will not only give you a sneak peek, but also suggestions for matching a customer's fashion style with their eyewear.

31B3

### **Top 10 Practice Management Mistakes & How to Fix Them**

8:30 AM – 9:30 AM

1 Hour

Mark Wright, OD

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The top 10 practice mistakes commonly made will be discussed with solutions describing how to avoid making these mistakes. Practical examples will be used so that the attendee will be able to go back to the practice and fix the problems.

31B4

### **Reduce Your Spectacle Lens Bill and Implement Lens Bundling**

8:30 AM – 9:30 AM

1 Hour

Jay Binkowitz

During this course we will provide specific examples of how to assess one of your largest expenses. You will understand how to review and reduce your lab bills while increasing your overall profitability and your staffs understanding of how to support your goals. In addition we will explore how to implement lens bundling and packaging strategies that will increase sales, increase profits and reduce the confusion our patients experience when purchasing lenses.

31B5

### **Current Concepts in Marketing and Merchandising**

8:30 AM – 9:30 AM

1 Hour

Dave Ziegler, OD

Increasing your optometric practice profitability depends on how well you market your products and services to your patients and how effectively you present your optical products in the dispensary. This course examines how to position your practice in the marketplace, and how to incorporate basic principles of design in your merchandising. In addition to looking within the profession, we look outside our field to learn from companies that are innovative and highly effective at performing these critical tasks. Integrated into the course are three implementation exercises that aid participants in making the first steps toward practice growth.

31L1

### **Smart Contact Lenses: The Future is Now**

8:30 AM – 9:30 AM

1 Hour

Jerome Legerton, OD

Smart contact lenses with micro-electronic and micro-optical components for IOP and blood sugar measurement, pharmaceutical delivery, and wearable media are described in the context of their respective platform requirements for clinical application and case management.

31O1

### **Technology - Are Your Patients More Up-to-Date Than You?**

8:30 AM – 9:30 AM

1 Hour

Phernell Walker, ABOM, NCLE

The technology driven practice will succeed in today's competitive market place. Patients live in a high tech world and expect the same from their Eye Care Professional (ECP). Technology

shapes the way we practice, the frames, lenses and treatments we offer, how we communicate and most importantly the way we think. This course will explore the high tech possibilities of delivering high tech premier patient experience to your patients. This course is a must for anyone that desires to remain as tech savvy as your patients.

3102

**A Survey of Private Label Free-Form Lenses**

8:30 AM – 9:30 AM

1 Hour

Michael Della Pesca, ABOM

TBD

3103

**Analyzing and Solving Eyewear Fitting Complaints**

8:30 AM – 9:30 AM

1 Hour

Alex Yoho, ABOM

You will learn concepts in eyewear fitting that will allow you to solve complaints in both frame comfort and vision. You will have a step by step method of ruling out potential difficulties even when the patient says " it's just weird". You will also gain knowledge that will help you design the proper eyewear for the patient's lifestyle that will avoid complaints in the first place.

3104

**How To Determine the Best Sun Lens for a Patient**

8:30 AM – 9:30 AM

1 Hour

Diane Drake, LDO, ABOM, FCLSA

Everyone's requirements for sun protection is not the same. As a matter of fact, every patient has sun protection needs that vary depending upon their particular usage outdoors. This course will discuss the opportunity as well as the responsibility of the ECP to introduce information to the patient/customer about the risks of not protecting their eyes with quality sunwear based upon their particular needs.

32B1

**Lessons from Silicon Valley**

9:45 AM – 11:45 AM

2 Hours

Moderator: Christine Chan; Panelists: Darnell Holloway, Paul Hou, Won Kim, Adam Ziegler

Come learn from Silicon Valley Executives about how to increase foot traffic into your practice, how to advertise to the new generation and how to put your best foot forward on all the popular social media sites. Speakers from Facebook, Google+, YouTube and Yelp! will be here to answer any questions you have. Increase your patient flow just by learning how to change your web presence!

32B2

**Sunwear: How to Steal Market Share and Make Big Money**

9:45 AM – 11:45 AM

2 Hours

Sharon Carter

Most patients have a pair of sunglasses. Did they buy them from you? You will learn how to successfully present sunglasses, an easy way to increase your optical revenue without seeing more patients. Every patient in your office is a prospect for sunwear. Most practices sell sunwear to 40-50% of the patients they present it to. Would that increase your optical revenue? You will also learn the 7 Reasons to Sell Sunwear.

32B3

**THE BIG PICTURE - Eyewear Challenges and Solutions in the Year 2020**

9:45 AM – 11:45 AM

2 Hours

Moderator: Stephanie De Long; Panelists: David Friedfeld, Mike Hundert, Jan Cory, Patrick Ho  
Three top industry frame executives share their views of key changes facing you and your business over the next several years. Among the topics covered by Silhouette president Jan Cory, REM president Mike Hundert, Rochester Optical CEO Patrick Ho, and ClearVision president David Friedfeld are 3D printing, international trends in manufacturing, and tomorrow's wearable technologies, plus future frame styling, materials, and distribution. This not-to-be-missed session will include plenty of time for questions, so bring your concerns re. the future of everything from retail and business formats to frame materials and production.

32B4

**How to Use Social Media Tools to Recruit and Hire 'A' Players**

9:45 AM – 11:45 AM

2 Hours

Daniel Abramson

Social media is having a fundamental shift in the way we recruit and hire top talent in every industry! Savvy candidates are looking for jobs in different ways other than Monster and Craigslist? and many smart businesses are embracing new digital recruitment tools like Facebook, Linked-In, and Twitter to reduce costs, increase productivity while casting a wider net through referrals. Hiring 'A-Players' presents an enormous challenge in today's candidate cluttered marketplace. The stakes are high. Experts agree that a bad hire can cost you 3 times a person's annual salary. In addition to recruiting costs, there's opportunity cost, lost business, loss of potential customers, loss of momentum, and loss of valuable time and energy! Have you ever hired someone only to have their evil twin show up at work? or wondered how to improve your interview process? This presentation is packed with interview strategies and best practice techniques that will help you increase your hiring efficiency and decrease costly turnover.

32B6

**The Power of a Spreadsheet - How to Utilize Spreadsheets to Efficiently Analyze and Grow Any Practice**

9:45 AM – 11:45 AM

2 Hours

Mark Johnson, LDO, ABO, NCLE

A spreadsheet is one of the most powerful tools to analyze and grow a practice. We will look how to easily customize spreadsheets for your practice. These spreadsheets will perform cost benefit analysis, zip code analysis, keep track of budget and forecast what to expect in certain environments. This course will allow you to know your metrics and have them easily available at your fingertips when you need them to help make decisions.

32L1

**GPS Guide To Advanced Scleral Lens Fitting**

9:45 AM – 11:45 AM

2 Hours

Melissa Barnett, OD; Clark Chang, OD

Diversities of scleral lens designs and their clinical applications have significantly improved in recent years. Scleral lenses can be utilized to manage irregular corneal optics and ocular surface diseases when other treatments have failed. This course will describe advanced fitting evaluation strategies and provide essential pearls on lens customizations that will optimize clinical success.

32O1

**Spectacle Lens Update: Everything You Need to Know**

9:45 AM – 11:45 AM

2 Hours

Michael Vitale, ABOM, LDO, NCLEC

This seminar is designed to give participants the tools needed for dispensing today's premium lens products. At the conclusion of the seminar, each participant will understand that having knowledge and expertise in the premium lenses products available today will ensure they are offering their patients/customers the best possible lens choices.

32O2

**Wearables...Where It's At, Where It's Going and Impact on Vision**

9:45 AM – 11:45 AM

2 Hours

Jerome Legerton, OD

Eye-wear borne micro-display technology is emerging and forecast to be a multi-billion dollar industry by 2020. The vision care professions have an important role in the management of patient adaptation to the new psychophysiological optics challenges as well as the measurement and physical fitting of the near eye display systems. Challenges and controversies will be presented in conjunction with the plurality of optical designs used to produce the virtual reality and augmented reality visual experiences. The lexicon for the electronic eyewear is presented in an effort to accelerate the understanding within the ophthalmic industry and to facilitate

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practitioner comparison of the many product offerings along with their forecast strengths and weaknesses.

3203

**Current Trends for Managing the Transmission & Absorption of Light Through Lenses**

9:45 AM – 11:45 AM

2 Hours

Diane Drake, LDO, ABOM, FCLSA

This course presents absorption and transmission of lenses as well as the different types of tints and coatings used on lenses. Included in discussion will be different types of lens materials and the properties of them with regard to absorption/transmission/tints/coatings. A brief description of anti-reflective coatings, polarized lenses, photochromic lenses, UV coatings, scratch resistant coatings, and tints will be included.

30B1

**The HOW? behind the WOW! at retail**

1:30 PM – 2:30 PM

1 Hour

Anne Marie Luthro

RETAIL is not a four-letter word. RETAIL supports your practice. Some of the strongest retail trends are already in place in your practice; make more of them. For example, YOU are local. "Shopping Local" is desirable to communities. Be sure you're seen as a great doctor and a great place to shop for all eye wear and eye care needs. Convenience is the biggest driver to any location and YOU own the "One-Stop-Shopping" model! Let your patients fully cross the "vision care" task off their list rather than making multiple stops.

33B1

**40 Best Marketing Strategies to Grow Your ECP Business**

2:45 PM – 4:45 PM

2 Hours

Trudi Charest

Let's kick start some growth in your ECP Business with the 40 Best Marketing Strategies. Whether you are a new practice, established optical store or an office with stalled growth numbers, you will find tons of tips to attract and retain customers in this workshop.

33B2

**Power Merchandising**

2:45 PM – 4:45 PM

2 Hours

Travis Reed, Eric Feigenbaum

Ever wish you could get relevant and usable advice from retail experts? Well now you can, thanks to this two-hour session featuring popular speaker and consultant Travis Reed, president of Creative Visionary, and Eric Feigenbaum, a world-renowned visual merchandising expert and professor at LIM C. They'll share their expertise, but, more important, will address issues

specific to your own visual merchandising and store décor challenges. This casual, give-and-take format is designed to answer specific problems you may be facing and provide you with up-to-the-minute retail information.

33B4

**Manage Your Frame Board, Don't Let It Manage You**

2:45 PM – 4:45 PM

2 Hours

Sharon Carter

Do you know how many frames are on your board? Do you know how many frames you should have on your board? If you can't answer both of these questions you are not managing your frame board it is managing you. This course gives you a formula for determining how many frames your practice needs to keep on the frame board. You will learn what mix of frames you need based on gender, age, and price point customized to your patient base and how to maintain this in an ongoing basis. This will free up money that is sitting on your board to use in other areas.

33B5

**The Consumer Connection**

2:45 PM – 4:45 PM

2 Hours

Mark Wright, OD; Jay Binkowitz

Emotional connection plays a huge role in consumer satisfaction and purchasing. Learn how to make the special connection that will INCREASE your REVENUE/EXAM.

33B6

**Assessing Vision Plans and Maximizing Your Profitability**

2:45 PM – 4:45 PM

2 Hours

Neil Gailmard, OD

This course will analyze vision plans from a business and profitability point of view, with an emphasis on facts and not emotion. A method to determine the profitability of each vision plan will be presented along with guidelines for how to decide if a practice should accept a plan. Additional concepts include the medical model, coordination of benefits and concepts for increasing practice profitability with various vision plans.

33L1

**A Trip Beyond The Limbus: Contact Lens Fitting for Complex Corneas**

2:45 PM – 4:45 PM

2 Hours

Clark Chang, OD; Stephanie Woo, OD

Due to advancing technologies, we now have numerous lens designs to better match the complexity of our hard-to-fit patients. This course will review the fitting principles of these new devices and their clinical applications in both regular and irregular corneas. Speakers will utilize

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clinical images and patient cases to highlight updates in large diameter GP lenses, hybrid lenses, and scleral lenses.

3301

### **Current Trends in Free-Form Lenses**

2:45 PM – 4:45 PM

2 Hours

Mark Mattison-Shupnick, ABOM

Good news, lens design tools, processing technology and computing power are constantly improving! Good and bad news, that means more choices for the ECP but you need to know what to do with them. This course teaches how to think of these terrific opportunities in the context of a patient's budget, vision needs, digital tools and retail wants.

3302

### **Frame Adjusting & Repair Workshop**

2:45 PM – 4:45 PM

2 Hours

Alex Yoho, ABOM

This hands-on course is an essential course for beginning dispensers, or those in the business that could use a refresher. Attendees will universally align a frame that has everything possible wrong with it. From this point we will consider factors that must be considered each time a frame is selected for optimum fit and optics. Finally attendees will use their universally aligned frame and practice adjustments necessary to fit it properly.

3303

### **Troubleshooting Progressives and Other Multifocals**

2:45 PM – 4:45 PM

2 Hours

Valerie Manso

In an ideal world a patient will put on their new eyewear and see well. At times however, some patients will immediately reject the new eyewear, and at other times patients will return after a few days of struggling with their new eyewear. How we handle patient complaints, troubleshoot the offending eyewear and subsequently resolve the problems are important skills. This program will look at the physical and psychological steps to uncover the source of the problems and ultimately resolve the situation to the patient's satisfaction.

34A1

### **Team Healthcare - What's Your Role in the Practice of the Future?**

5:00 PM – 6:00 PM

1 Hour

John Rumpakis, OD

The traditional model of optometric practice will be unsustainable in the healthcare system of the future. Other medical specialties are incorporating the model of team healthcare, where each individual within the practice plays a specific role in delivering health care to the patient and is

not solely reliant on the physician's participation. This innovative program will help you determine your role in this new healthcare marketplace and how you can be one of the primary drivers of quality care and profitability.

34B1

**Compete for the Walking RX's**

5:00 PM – 6:00 PM

1 Hour

Trudi Charest

On average an eyecare practice can lose up to 50% of RX's. Find out why patients choose to leave your practice or optical store and what you can do about it. Share best practices and useful tips that can be successful in taking control back to practices and moving forward. Understand how to formulate strategic solutions that will assist in competing with the main reasons why people leave our practices. We will discuss what is happening online, patient and consumer perceptions and expectations, changes in how people research and buy as well as what the average consumer really thinks when buying eyewear.

34B2

**Best Practices for a Staff Meeting**

5:00 PM – 6:00 PM

1 Hour

Joy Gibb, ABOC

Staff meetings can be used as a developmental tool in training, team building, communication, and boosting sales and service. But the reality is staff meetings are usually disappointing at best. There are specific ways you can make your next staff meeting more effective, enjoyable and productive. The ideas presented in this course will help eye care professionals have staff meetings that are productive and beneficial for everyone involved.

34B3

**Creating and Delivering a Memorable Patient Experience**

5:00 PM – 6:00 PM

1 Hour

Dave Ziegler, OD

Why should patients choose your office for their eye care needs with all the other options available? It's important to find ways to create personalized patient experiences in your office that they can't get anywhere else. This class will show you ways to create your own brand that attracts patients and creates loyalty. We'll look at a variety of examples of how the best companies continue to succeed year after year by the experiences they deliver to their customers. Then we'll talk about how to implement those strategies into your eye care practice.

34B4

**Growing Your Business from Inside Out**

5:00 PM – 6:00 PM

1 Hour

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Jay Binkowitz

All too often we spend a lot of time on initiatives that have very little benefit to our overall business goals. This course will assess the strategic and organizational thought processes necessary to get the most out of your efforts by concentrating on those initiatives that will bring you the best results. We all know it is better to succeed at less than to fail at more so let's grab the low hanging fruit from within. This course will take a close look at those areas of your business that are most important to embrace.

34B5

### **If I'd Only Known Then What I Know Now - A Consultant Perspective**

5:00 PM – 6:00 PM

1 Hour

Gary Gerber, OD

After practicing for 20+ years and consulting just as long, a consultant shares his unique perspective on what REALLY are the "best practices" of the best practices. And, they're probably not what you think!

34L1

### **Utilizing Biological Contact Lenses to Their Maximum Potential**

5:00 PM – 6:00 PM

1 Hour

Stephanie Woo, OD

This course highlights the use of biologic corneal bandages to help the patient and the practitioner alike. Historic use of amniotic membranes is discussed. Properties of amniotic tissue is reviewed. Biological bandages are explained in detail. Candidates for this device are listed. Insertion and removal of the device is discussed. Tips and troubleshooting of biologic corneal bandages are reviewed. Billing and coding of the device is outlined. Two case reports are presented.

34O1

### **Considerations in Converting a Multifocal Rx to Task Specific Eyewear**

5:00 PM – 6:00 PM

1 Hour

Diane Drake, LDO, ABOM, FCLSA

While this course is designed to be a basic level course, it will present information in a way that the more experienced participant will find beneficial as well. This course will introduce types of lenses and will also discuss how to transpose a prescription as well as how to convert a bifocal prescription to a task specific prescription. Included will be how to place the prescription on an optical cross in order to visualize the finished product.

34O2

### **Handling Prescriptions That Contain Prism**

5:00 PM – 6:00 PM

1 Hour

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Phernell Walker, ABOM, NCLE

The topic of Prism strikes fear into many Eye Care Professionals including opticians, optometrists and ophthalmologists alike. Prescriptions with Prism can create some unique challenges. This fun and interactive course explores both prescribed and acci-dental prism. Students will learn about Geometric Optics of Light, Prentice Rule, decentration, Prescribed Prism - Therapeutic vs. Adverse Prism methods, Prism distribution methods, verify prescribed prism, compounding and resolving prism, Prism Thinning, Bi-Centric Grinding, how to prescribe prism for a prosthetic eye and coping with the unexpected induced effects of prism and more.

41B1

### **Maximizing Coding for Eye Care Visits**

8:30 AM – 10:30 AM

2 Hours

Mary Pat Johnson, COMT, CPC, COE, CPMA

Course will provide an explanation of both the evaluation and management codes and eye exam codes used by optometrists. Specifically, we address:

- expected utilization of each code
- obtaining and recording the appropriate elements (history, exam and medical decision making) for E/M codes
- requirements of eye exam codes.

41B2

### **Building High Performing Optical Teams**

8:30 AM – 9:30 AM

1 Hour

Trudi Charest

The eyecare marketplace is changing, leading to fundamental shifts in the way we compete now and will in the future. There is growing realization that business growth will be a direct result of highly engaged employees delivering an unprecedented level of service to our ever distracted customers. Great businesses know it is always about great people first. Join us to find out how to build a great Optical team and environment.

41B3

### **Increasing Your Average Sale**

8:30 AM – 9:30 AM

1 Hour

Joy Gibb, ABOC

Maximizing the potential from every eyewear sale will result in huge profits for your office! Learn how to make the most of every Rx, and win patient loyalty at the same time. This course includes practical tips on finding your floor price, evaluating your current revenue per patient, and great ideas for increasing that revenue.

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41L1

**Scleral Lens Applications for Normal Corneas**

8:30 AM – 9:30 AM 1 Hour

Stephanie Woo, OD

This course will review the current scleral lens applications for irregular corneas. The differences between scleral lenses for regular corneas vs. irregular corneas will be addressed. Ten categories of patients will be defined as good scleral lens candidates with specific details of each category. Benefits of scleral lenses will be highlighted. Presentation of scleral lenses to the patient will be discussed. The fitting process and follow up care will be reviewed.

41O1

**Advanced Concepts of Prism**

8:30 AM – 9:30 AM 1 Hour

Michael Della Pesca, ABOM

TBD

41O2

**Optical Geek is Chic: Lens Tech Meets Fashion**

8:30 AM – 9:30 AM 1 Hour

Phernell Walker, ABOM, NCLE

What do you see when you look around? Heavily influenced by technology, Geek is Chic in everything from eyewear, fashion, clothing, TV Shows and more. This fun course takes an up-close look at the needs, desires of patients and the cosmesis of blending optical theory with cosmetic lens and frame design everyone will love. Topics include, Lens substrates, Thin Film Color to Frame Matching technology, frame considerations, sustainable frame materials and demographic specific design.

42B2

**Five Zones of Practice Operations**

9:45 AM – 11:45 AM 2 Hours

Michael Rothschild, OD

Successful businesses divide their enterprise into a number of strategic centers for profitability. Optometric practices are no exception. This course challenges traditional areas of optometry practices by introducing "five new zones" of practice. Each zone must be successful for the practice to succeed as a whole.

42B3

**The New Rules of Selling in Eyecare**

9:45 AM – 10:45 AM 1 Hour

Trudi Charest

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The eyecare consumer has changed! So selling to the new eyecare consumer must also adapt and change. Gone are the days of quick greeting, show a few frames styles and the sale is made. Consumers are over educated, highly researched and have certain expectations of sales and service. To sell today you need an edge, a uniqueness and an value offering that sets you apart from your competitors.

42L1

### **Soft Contact Lens Multifocals - Moving from Adequate to Expert**

9:45 AM – 10:45 AM

1 Hour

Milton Hom, OD

Most soft CL multifocal education focuses on one particular lens type. For the clinician, this presents an unrealistic approach. Our discussion centers on multi-brand fitting algorithms, practical tips and troubleshooting.

42O1

### **Spectacle Lens Material Decision Tree**

9:45 AM – 10:45 AM

1 Hour

Valerie Manso

Once upon a time the only lens material available to the ophthalmic professional was glass. Then along came resin lenses in the form of CR-39 and polycarbonate. Today we can add 1.54 index, 1.56 index, 1.60 index, 1.67 index and more. Now throw into the mix a variety of photochromic materials and we have a resultant maze.

This session will assist in unraveling this complex maze of options. Every lens material has its uses. In order to best assist the eyewear consumer, it is essential that optical professionals understand the features or characteristics of a given lens material and be able to translate these characteristics into customer benefits.

42O2

### **Eye Diseases Opticians and Technicians Should Know About**

9:45 AM – 10:45 AM

1 Hour

Vincent Young, OD; Shana Zeitlin, OD

Eye Diseases That Opticians and Technicians Should Know Technicians and opticians often encounter patients' questions about a variety of ocular conditions. It's in the best interest of quality of patient care that technicians and other office staff understand the basics of these conditions in order to provide accurate information. This one hour talk will attempt to provide an important and essential understanding of a number of anterior segment, posterior segment, and neuro-ophthalmologic conditions in order to better prepare the listener for answering these questions.

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43B1

**Co-Management of Post Surgical Care That Can Increase Profitability**

11:00 AM – 12:00 PM 1 Hour

Mary Pat Johnson, COMT, CPC, COE, CPMA

When post-op care is shared between providers, all parties involved must pay close attention to claims and documentation, in addition to the patient care. This course will review CMS claims instructions and provide tips and tools to improving communication between providers minimize errors in the claims process and help ensure the patient understands the process.

43B3

**Conflicts: Avoiding Them and Resolving Them**

11:00 AM – 12:00 PM 1 Hour

Joy Gibb, ABOC

Most people don't like conflict and will usually avoid it at all costs. But when dealing with the public chances are pretty good there are going to be conflicts. This course will explain techniques to avoid conflicts and explore ways to diffuse conflicts once they've occurred.

43O1

**Which Frame Material is Right for My Patient?**

11:00 AM – 12:00 PM 1 Hour

Michael Della Pesca, ABOM

TBD

43O2

**How to Take Position-Of-Wear Measurements for PALs Workshop**

11:00 AM – 12:00 PM 1 Hour

Alex Yoho, ABOM

You will learn the effects that position of wear has on the intended Rx. You will learn several methods that most position of wear measurements may be taken both manually and automatically. Understanding position of wear will give you better knowledge to recommend more advanced lenses for the patient's visual comfort and clarity.

44B1

**Key Coding Concepts - What You Don't Know Could Hurt Your Practice and Profits**

1:45 PM – 3:45 PM 2 Hours

Mary Pat Johnson, COMT, CPC, COE, CPMA

This course documentation and billing guidelines for ancillary services: diagnostic tests and minor surgery procedures as well as the use of modifiers needed on some claims.

44B2

**The Six Fundamentals of Practice Success**

1:45 PM – 3:45 PM

2 Hours

Michael Rothschild, OD

Every optometry practice is different. The dreams, the aspiration and the method of eye care varies tremendously from one practice to another. However, all successful practices have several basic fundamentals in place to allow success. When these core fundamentals are strengthened, all other aspects of any practice can't help but fall into place.

4401

**Neutralizing and Verifying Lenses that Have Prism Workshop**

1:45 PM – 3:45 PM

2 Hours

Alex Yoho, ABOM

You will learn the effects that unwanted prism has on the intended Rx. You will learn methods to determine prism amounts in both manual and automatic lensmeters. Understanding prism will give you better knowledge to troubleshoot lenses for the patient's visual comfort and clarity.

4402

**Therapeutic Aspects of Eyeglass Lenses**

1:45 PM – 3:45 PM

2 Hours

Valerie Manso

We are seeing the very early stages of a change in how we think about ophthalmic lenses. This is exciting stuff for optometrists and opticians! In addition to the traditional use of lenses for refractive correction. We now see true scientific studies showing ophthalmic lenses can provide an additional health benefit by blocking certain wavelengths of light. They are often referred to as therapeutic lenses.

45B1

**DME and Medicare - Critical Info To Protect Your Practice and Profit!**

4:00 PM – 5:00 PM

1 Hour

Mary Pat Johnson, COMT, CPC, COE, CPMA

Course will identify Medicare's requirements for obtaining reimbursement for postcataract eyeglasses. Attendees will:

- Be understand the documentation requirements for DME claims
- Be able to accurately complete a Medicare claim for postcataract eyeglasses

45B2

**Building Loyalty With Internal Marketing**

4:00 PM- 5:00 PM

1 Hour

Michael Rothschild, OD

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Optometric practices must have a steady flow of new patients to sustain growth. They must also maintain a loyal following to generate referrals and maintain relevance in the community. This course focuses on intently growing the loyal "fan base" of your practice.

4501

### **Which Digital Dispensing Aid is Right for Me?**

4:00 PM – 5:00 PM

1 Hour

Michael Della Pesca, ABOM

TBD



**Daniel Abramson**

Daniel Abramson, CTS, President of StaffDynamics is an accomplished author of two books, sought-after sales trainer and business coach. He has focused on workforce performance strategies and “raising the bar” for over 25 years.

Prior to StaffDynamics, Daniel was President of an international staffing firm with 120 offices. Under his leadership, revenues nearly tripled and profits increased almost nine-fold. Daniel’s energetic, no-nonsense style appeals to clients seeking results at a new level. His philosophy is simple, his training is tough, his results are rewarding. His proven ability as a business strategist consistently earns rave reviews that last well beyond his time on the podium. He has delivered thousands of presentations; keynotes, breakouts, workshops and retreats to organizations worldwide.

Daniel lives in the Washington, DC area with his wife, two daughters, and a bevy of pets.

**Melissa Barnett, OD, FAAO**

Melissa Barnett, OD, FAAO is a Principal Optometrist at the UC Davis Medical Center in Sacramento. She specializes in anterior segment disease and specialty contact lenses. Dr. Barnett lectures extensively and has been published on topics including dry eye, anterior segment disease, contact lenses, corneal collagen cross-linking and creating a healthy balance between work and home life for women in optometry. She is on the Board of Women of Vision and The Scleral Lens Education Society. Dr. Barnett is a spokesperson for the California Optometric Association and has appeared on several television shows. In her spare time she enjoys cooking, yoga and spending time with her husband, Todd Erickson, also an optometrist, and two sons, Alex (8) and Drew (6).

**Joe Barr, OD**

Dr. Barr received his doctor of optometry degree from The Ohio State University College of Optometry and completed a combined Advanced Practice Fellowship in cornea and contact lenses and a Master of Science in Physiological Optics. Dr. Barr is chairman of the American Academy of Optometry Cornea and Contact Lens Section, and from 1987 to 2007, he served as editor of Contact Lens Spectrum and the Contact Lens Today weekly newsletter. He is also a member of the International Society for Contact Lens Research, the International Association of Contact Lens Educators and the American Optometric Association. Dr. Barr joined Bausch + Lomb in 2007. In 2008 he was named vice president, Global Clinical & Medical Affairs and Professional Services, Vision Care. In this role for Bausch + Lomb, Dr. Barr leads a team of clinical researchers, medical affairs professionals and professional services specialists who provide high-end products and services to eye care professionals. Prior to joining Bausch + Lomb, Dr. Barr served as Associate Dean for Professional Program and Clinical Services and EF Wildermuth Professor of Optometry at The Ohio State University College of Optometry.

**Jay Binkowitz**

Over the last 30years Mr. Binkowitz has had extensive experience in retail operations, merchandising & marketing, manufacturing & distribution, technology development, national sales, and on site interactive consulting. As president of GPN Business Consulting he has dedicated his time and resources to supporting independents through out the nation.  
[www.GatewayPN.com](http://www.GatewayPN.com)

**Marc Bloomenstein, OD**

Dr. Marc R. Bloomenstein is a 1990 graduate of the University of California at Los Angeles with a degree in Biology. He received his optometric degree from the New England College of Optometry in 1994. After graduation Dr. Bloomenstein finished a residency in secondary ophthalmic care at the Barnet Dulaney Eye Center in Phoenix, Arizona. He received his fellowship from the American Academy of Optometry in December 1998 and is a founding member of the Optometric Council on Refractive Technology. Moreover, Dr. Bloomenstein is an Adjunct Assistant Professor at the Southern California College of Optometry and Arizona College of Optometry. Currently Dr. Bloomenstein is the Director of Optometric Services at the Schwartz Laser Eye Center in Scottsdale, Arizona. Aside from lecturing and publishing on numerous anterior segment and refractive topics, Dr. Bloomenstein is on the editorial board of Primary Care of Optometry News, Review of Optometry, Optometry Times and a frequent contributor to various optometric journals. Dr. Bloomenstein also has weekly blog on the Review of Optometry website. Dr. Bloomenstein served as the President of the Arizona Optometric Association, as well as, an Optometric Advisor to STAAR Surgical, Bausch & Lomb, Allergan, Odyssey, Inspire, TearLab, and Alcon. Dr. Bloomenstein is the President of the Board of the Arizona Optometric Charitable Foundation. Dr. Bloomenstein is the current President of the Optometric Council on Refractive Technology and a member of the ASCRS Integrated Eyecare Delivery Task Force.

**Joe Buttazzoni**

In February 2013, the size of the region increased to include Joe's home state of Michigan, Indiana, Kentucky, and Ohio, and Joe's former territory Florida and Puerto Rico to what was known as the West Region.

September 2006, Eschenbach Optik of America, Inc., has appointed Joseph Buttazzoni to the position of Sales Manager Western United States. Joe joined Eschenbach in 1999 as a Territory Manager for the North Central Territory, a position he held for four years.

Following a relocation to Florida in 2003, where he owned and operated a retail optical shop, specializing in the needs of low vision patients, he re-joined Eschenbach as the Territory Manager for Florida and Puerto Rico in 2004.

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Before joining Eschenbach, he held a variety of sales and management positions with Essilor, American Optical, and Vision-Ease Lens. Also, a published author of both American and Canadian Board Certified Educational courses.

Joseph holds a Bachelor's degree in Marketing (1981) and is a 1980 graduate of Ferris State University Ophthalmic Science curriculum.

### **Sharon Carter**

Sharon Carter has over 22 years of optometric experience including working in an office as an office manager, sales and training for an optometric software company to consulting for private practices. She started her own consulting company, Eye Care Optometric Consulting (ECOC), in 2001 and personally consults in offices all over the country spreading her team building philosophy. She is very energetic and enthusiastic and for more than 9 years has been speaking and motivating staff at state associational meetings, national and international conferences sharing her company's philosophy of 'provide the best patient care possible and the money will follow.'

### **Christine Chan, OD**

Christine has been practicing optometry for the last 11 years in Southern California. She started her career in academia at UC Berkeley's School of Optometry. She started one of their satellite clinics down in Southern California where she built the optometry clinic from scratch. Her last year at UC Berkeley, she was the Director of Community Clinic Development where she managed 50 Safety Net Clinics' Telemedicine Programs in the State of California. Currently she is an Assistant Professor at Marshall B. Ketchum University and also Adjunct Clinical Faculty at Western University. She has also worked in private practice, retail and HMO settings. Dr. Chan is on the Conference Advisory Board for the International Vision Expo. She is also a consultant to many pharmaceutical companies, Kaiser Permanente Vision Essentials and to ophthalmic device start-ups as well. She is married and lives in Irvine, California with an adorable fat cat.

### **Clark Chang, OD, MSA, MSc, FAAO**

Dr. Clark Chang is Director of the Contact Lens division at The Cornea and Laser Eye Institute-Hersh Vision Group in Teaneck, NJ. After his residency training, he went on to complete a clinical fellowship in Cornea and Contact Lens where he focused his research work on surgical and non-surgical treatment options for irregular corneas. In addition to being President of New Jersey Academy of Optometry, he also serves as an advisory board member at the Gas Permeable Lens Institute (GPLI) and the National Keratoconus Institute. He is also an adjunct faculty for Pennsylvania College of Optometry at Salus University. Dr. Chang has extensive experiences in education and research, and he lectures both in the U.S. and internationally in his areas of expertise.

**Trudi Charest**

Trudi Charest is currently the Co-Founder of 4ECP's, an organization focused on creating resources for eyecare professionals including Jobs, Training & Marketing. Trudi is also the Director of Training & Events for Eye Recommend, a network of Optometrists with over 400 clinics in Canada. She is a well known international speaker, author, consultant and business innovator in the eyecare industry.

Trudi is a Licensed Optician and also holds a Management Certificate in Human Resources from the University of Calgary. Her extensive industry background includes Director of Marketing at Eye Recommend, Clinical Consultant for Optos North America, Territory Manager for Bausch & Lomb and Corporate Training and Recruiting for one of Canada's largest Optical Chains.

**Richard Clompus, OD**

Dr. Clompus is a residency trained optometrist who established a multidisciplinary eye care practice in southeastern Pennsylvania and provided patient care for 20 years. He has published 45 articles, three text book chapters and has lectured extensively. He has held leadership positions with Johnson & Johnson Vision Care launching the DEFINITY progressive lens and heading The Vision Care Institute. He has also served as VP Global Professional Relations at CooperVision and PixelOptics. He established The Clompus Consulting Group in 2014 to create digital media for the eye care industry. He currently serves as VP Communications with PogoTec and Professional Editor for Optometric Office.

**Jeffrey Cooper, OD**

Dr. Jeffrey Cooper received his doctor of optometry in 1971 (PCO) and his MS in physiological optics in 1978 (SUNY). He completed a residency in vision therapy at The State College of Optometry, SUNY in 1971. Currently, he is a Clinical Professor at SUNY. He has published over 60 peer reviewed articles and is on the editorial board of Binocular Vision and Eye Muscle Surgery. He maintains three practices with optometric and ophthalmological partners in Manhattan, Brooklyn, and Staten Island. In addition, he is the inventor of Computer Orthoptics and HTS, office and home computerized vision therapy programs.

**Jan Cory**

TBD

**Aaron Dallek**

Aaron Dallek is the co-founder and CEO of Opternative, the first online eye exam that delivers a prescription, signed by an ophthalmologist, for glasses and contacts. The exam takes less than 25 minutes and all you need is a computer and smartphone. Once a licensed ophthalmologist approves your results, your prescription is delivered in 24 hours or less. Before founding

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Opternative, he co-founded Planet Metrics, which was sold to PTC in 2010. He also co-founded Cheap Ink, ranked on the Inc. 5000 in 2011.

### **Edward De Dennaro, MEd, ABOM**

Mr. Ed De Gennaro is a noted authority on practical optics, dispensing, sales, management and training. He lectures extensively at national, state and local optical meetings, and has presented in Europe, Canada and Puerto Rico. Formerly a Professor and Program head of the Opticianry Program, and the Dean of the School of Health Sciences at J. Sargeant Reynolds Community College in Richmond, Virginia, he currently operates Infocus Optical Consulting, and is also the Director of Professional Content for First Vision Media Group, the Editor-in-Chief of The American Optician, and a member of the Vision Expo Advisory Committee.

### **Stephanie De Long**

Stephanie De Long is editor-in-chief of Eyecare Business magazine and has been covering the industry for more than two decades. Prior to entering optical, De Long was a business writer and contributing editor for a variety of New York-based consumer and business magazines, as well as the owner of a restaurant there.

### **Michael Della Pesca, ABOM**

As president of Quantum Optical, Michael is a pioneer in the field of e-learning and education for eye care professionals. He is the creator and chief architect of the highly acclaimed Internet platform, [www.quantumoptical.com](http://www.quantumoptical.com), which provides continuing education credits online to certified and licensed ophthalmic professionals worldwide. Michael was an instructor at his alma mater, Essex County College, where he taught for 12 years in the Vision Care Technology department. He has hosted and lectured at hundreds of conferences, both nationally and internationally. Thousands of individuals have enjoyed his unique and entertaining style of presenting topics such as general optics, advanced optics, eyewear fabrication, dispensing and sales techniques, lab / dispensary management, customer service and marketing strategies. Michael currently provides educational consulting services to a wide array of industry vendors and corporate clients who are "Powered By Quantum," and offers customized in-house staff training solutions to eye care practices that require a more personalized approach to staff excellence.

### **Raymond P. Dennis, M.A.(Ed.)**

Mr. Dennis is a Professor and Program Coordinator of the Ophthalmic Design and Dispensing Program at Middlesex Community College in Middletown Connecticut. He has been licensed as an Optician and Contact Lens Technician in NY and CT, and is certified by JCAHPO as a Certified Ophthalmic Technician. Ray is a Fellow of the National Academy of Opticianry and the Opticians Association of America. He also serves as a member of the Board of Directors of Vision Health International and the Connecticut Lions Eye Research Foundation.

**Diane Drake, LDO, ABOM, FCLSA**

Owned and operated a successful independent practice in Georgia for over 20 years; Licensed Georgia Optician; ABO master optician; NCLE Advanced certified, Fellow, CLSA; Past President, Opticians Association of Georgia and SouthEastern Opticians Conference.

**Meera Dua**

I am currently the Sr. Director of Product for LensCrafters. I have been in the optical industry for 19 years. 9 with Cole Vision and 10 with Luxottica who purchased Cole Vision. I have worked during that time on 5 different retail business divisions ranging from value chains to premium/luxury and also spent several years working in product development developing Luxottica's North American brands. I also lived in Santiago, Chile for 2 years and oversaw product/planning for a chain we purchased in South America. I double majored in finance/marketing and had no intentions of going into this line of work when I graduated but am thrilled I ended up here.

**S. Barry Eiden, OD, FAAO**

Dr. Eiden is president and medical director of North Suburban Vision Consultants, a private multi-specialty group practice. He is also president and medical director of Keratoconus Specialists of Illinois and co-founder of EyeVis Eye and Vision Research Institute. Dr. Eiden has faculty appointments at the University of Illinois Medical Center, Department of Ophthalmology as well as at Indiana, Illinois, PCO and UMSL Colleges of Optometry. He is past chair of the AOA contact Lens and cornea section and is a frequent author and lecturer both nationally and internationally. Dr. Eiden serves on the Vision Expo conference advisory board.

**Eric Feigenbaum**

Eric Feigenbaum is Chair of Visual Merchandising for LIM College, Where Business Meets Fashion, in New York City. He is also the New York editor for VMSD magazine, the nation's premiere magazine in the areas of visual merchandising and store design. He is the recipient of the coveted Markopoulos Award for excellence in visual merchandising, and has both international and domestic long term experience in the field.

**David Friedfeld**

David Friedfeld is president of ClearVision Optical, a family-owned business based in Hauppauge, NY. ClearVision designs and markets quality eyewear and sunwear for 12 distinctive brands, including BCBGMAXAZRIA, Cole Haan, Marc Ecko, Ellen Tracy and IZOD to name just a few.

As the son of ClearVision's founder Fred Friedfeld, David always played a role in the family business. However, it wasn't until 1985, after graduating Magna Cum Laude from Lehigh

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University and earning a degree in law from Washington and Lee University School of Law, that David began his full-time career with ClearVision.

As president, David provides vision and leadership to all areas within the organization, and to every member of the ClearVision family. David has directed every area of the business related to sales, product and distribution and has seen the company grow to more than 200 employees today. Now a global enterprise, ClearVision serves optical professionals throughout the U.S. and in 40 countries throughout Europe, Asia, North Africa, Latin America and the Caribbean.

Under David's guidance, ClearVision has received countless honors and accolades from both the eyewear industry and the business community.

In 2010, the company's BCBGMAXAZRIA eyewear line was honored by Vision Care Product News as one of the “Top Ten Products of the Decade: Eye & Sun.” Furthermore, Jobson Research, a leading source of business intelligence in the optical industry, consistently ranks ClearVision Optical as one of the top 5 suppliers in the United States in several categories.

Recently, The New York Enterprise Report awarded ClearVision the “Small Business Award for Human Resources” and the company's college internship program was honored by Dowling College as “Employer of the Semester.” In addition, ClearVision has been awarded The Hauppauge Industrial Association's “Business Achievement Award for Growth” and it's “Small Business Achievement Award.”

ClearVision is featured in the 2009 Amazon.com best seller, *Who's Your Gladys?*, a business publication that focuses on customer service best practices. The company is also highlighted in Jay Heyman's *All You Need is a Good Idea!*, a popular book covering innovative marketing strategies. David's wisdom has also been featured in *Inside Healthcare* magazine, with an editorial spotlight on ClearVision Optical.

David has appeared on *The Growth Strategist*, a popular internet radio show on the Voice America Talk Radio Network that features interviews with top executives from successful midsized companies. He has been a featured guest on Robert Reiss' *The CEO Show*, which airs on the Business Talk Radio Network.

In addition, David is a proud member of several well-known associations, including The Vision Council, The Washington and Lee University Law Council, Vistage, UJA and The American Israel Public Affairs Committee.

Deeply rooted in the Friedfeld family's belief that everyone can make a positive difference in the world, ClearVision Optical is committed to giving back to the community. To this end, David Friedfeld has played an instrumental role in forging long-term relationships with several

charitable organizations, including Susan G. Komen for the Cure®, Long Island Cares, UCP Suffolk, AHRC Suffolk and others. For his and ClearVision's charitable work, David has been honored by Big Brothers and Sisters of Suffolk County, Long Island Cares, LI Harvest, Madonna House, Carol M. Baldwin Breast Cancer Research Fund and Newsday Charities Help-A-Family Campaign.

David and his wife Vicki live on Long Island and have four children, Jake, Sam, Faith and Lucas. In his spare time, he enjoys reading and running.

### **Neil Gailmard, OD**

Dr. Gailmard is co-founder, President and COO of Prima Eye Group, a leading doctor's alliance and management services firm. He is also founder and CEO of Gailmard Eye Center in Munster, Indiana, one of the largest independent optometric practices in the U.S. Neil is a leading management consultant for optometrists in private practice. An expert in the field of practice management, Dr. Gailmard is well known for his popular e-newsletter Optometric Management Tip of the Week as well as numerous articles and columns in professional journals. He is one of optometry's most sought-after speakers and frequently presents lectures at major national conferences and state associations. Neil created Practice Management University for the AOA and served as Chairman for four years. He is also a founding faculty member and long-time speaker for the highly-regarded Management & Business Academy, co-sponsored by Ciba Vision and Essilor. Neil has a bachelor's degree in Visual Science, a Doctor of Optometry degree and an MBA degree with a concentration in Human Resource Management. He served as a professor at Illinois College of Optometry for twenty years and received accolades as Faculty Member of the Year, the Professional Achievement Award and the Presidential Medal of Honor. Gailmard is currently a visiting lecturer at University of California, Berkeley, School of Optometry. He is a member of the AOA and a Fellow of the American Academy of Optometry.

### **Bill Gerber**

Bill Gerber began his optical industry career over 25 years ago as a sales representative for Neostyle Eyewear, before becoming National Sales & Marketing Manager. He then founded Delectable Display in 1998, serving companies such as Starbucks, Sunglass Hut, Lenscrafters, Sony, Apple, Victoria's Secret and Target and over 1500 leading independent optometric practices. In 2012 he founded OMG! Optical Marketing Group, a finishing touch design and production resource that exists to help fine tune optical spaces and their sales techniques. OMG was born out of Gerber's New Rules of Optical Retailing Guidebook, now considered to be the de facto source for effective retailing of optical products. He is also co founder of ContentLink, the industries first marketing content distribution platform. Gerber has served on numerous boards and advisory positions, is very active on the speaking circuit and serves as guest emcee for numerous charity events.

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### **Gary Gerber, OD**

Dr. Gary Gerber is the founder and president of The Power Practice, a practice building company whose mission is to make doctors more profitable and efficient. Dr. Gerber is also a prolific writer and speaker. He has published hundreds of articles and given more than 500 presentations. He is also the host of optometry's only live talk radio show, 'The Power Hour' ([www.PowerHour.info](http://www.PowerHour.info))

### **Joy Gibb, ABOC**

Joy L. Gibb, ABOC began her optical career in 1986. She managed a independent retail opticianry in Bountiful, Utah for over ten years before opening her own business, Eyes Of Joy Mobile Optical Service and is an optician at Daynes Eye and Lasik. In addition, she often consults practices about their dispensaries and improving customer service and sales. Patients often seek her help with the difficult to fit prescription, progressive lenses, and children's eyewear. Joy is also a contributor to Vision Care Product News and has participated in the writing of several industry guides and publications and has served as a member of the Better Vision Institute.

### **Alan Glazier, OD**

Dr. Glazier is a practicing optometrist and CEO of Shady Grove Eye and Vision Care, a large private practice in the Rockville, MD suburbs of Washington DC. Dr. Glazier the co-founder of the industries first annual virtual conference, Seeing Is Believing. He is founder of the industries most active modern social media group 'ODs on facebook', and is the founder of the Networked Eye Care Alliance social media groups and websites including the acclaimed 'Eyegregator.com'. Dr. Glazier authored 'Searchial Marketing: How Social Media Drives Search Optimization and an eBook 'Customer Communication Software'. He has been interviewed by Entrepreneur magazine and NetworkSolutions. Awards: Review of Optometric Business/Vision Monday '2011 Optometric Business Innovator' digital media. D.A.R.E. 'Lead, Follow or Get Out of the Web' award, honoring his cutting edge online marketing efforts. Recently he was chosen as one of 2012s Optometric Industry Influencers by the VisionMonday organization.

### **Colleen Hannegan**

Colleen's love affair with frame wearing and frame styling started in the third grade when she began wearing cool looking eyewear. From her first optical trainee position in 1980, her 35 year career in optics has included all levels of multi-chain optical store mangement before owning her own successful optical shop for over 22 years in southern California.

She now enjoys combining her free lance writing career with teaching and advising other optical business owners the skills needed to stay focused on success.

**Jerry Hayes, OD**

A nationally recognized consultant on the business side of practice, Dr. Jerry Hayes has a passion for helping optometrists become more successful in private practice. His work in the areas of staff productivity, practice finance and production metrics has had a positive impact on the way thousands of ODs manage their offices today. Jerry is the co-founder of Prima Eye Group as well as the owner and President of HMI Buying Group and Red Tray.

**Mark Hinton, ABO**

Mark Hinton graduated from the Hillsborough College Opticianry Dispensing Technology program in 1975, with honors. Mark began his professional Optical Career as an optician associate with Guild Opticians, Mills Anderson Opticians, in Pasadena, Florida. Mark then managed 2 Pearl Vision Centers in Bradenton and Clearwater Florida in order to advance his knowledge of Corporate Opticianry. Mark purchased Woodside Opticians and began a 25 year professional career as an independent optician/owner with offices in New Port Richey, Tarpon Springs, Spring Hill, and Port Richey Florida. After selling Woodside Opticians Mark became a partner in a young thriving private practice in N.C.

**Patrick Ho**

Patrick Ho is the President and CEO of Rochester Optical, a company with a long history of frame and lens manufacturing dating back to 1932. He acquired the company in 1990 and quickly grew and diversified the business, adding a full service optical lab in 1995, expanding to safety and Government contract manufacturing, and opening his first local retail stores in 2001.

In 2006, Patrick was an early adopter in digital free form lens fabrication technology, formed a R & D Department in 2009, invested in a Stratasys Fortus 3D printer in 2012. In the same innovative vein, Rochester Optical launched the most advanced optical solutions for smart glasses in 2013, including proprietary prescription lenses, safety solutions, and fashionable frames and accessories for a portfolio of smart glasses including Google Glass, Epson Moverio, Recon Jet, Vuzix M-100 and Sony SmartEyeGlass.

Patrick built the Rochester Optical we know today – a unique, privately-owned optical company, bringing innovation to a new frontier.

**Darnell Holloway**

TBD

**Milton Hom, OD**

Milton M. Hom OD, FAAO, FACAAI (Sc), practices in Azusa, California. He has written over 160 publications. He serves on several editorial boards and has over 60 published abstracts and peer-reviewed papers.

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Dr. Hom is a Scientific Fellow of the American College of Asthma, Allergy and Immunology (ACAAI) and Diplomate of the American Board of Optometry.

Dr. Hom authored Mosby's Ocular Drug Consult and Manual of Contact Lens Prescribing and Fitting Third Edition (Elsevier).

He is a multi-award winner, most recently AOA Luminary award and AOA CLCS Legend Award.

### **Paul Hou**

Paul is a product engineer working under the Ads & Pages organization at Facebook. He has worked on Facebook's suite of easy-to-use advertising tools (Boosted Posts, Promoted Pages, etc.) as well as the growth of Pages Messaging to connect businesses and customers. Before Facebook, Paul worked at Bloomberg developing products for the financial sector. He regularly gives talks to all types of audiences, in both academia and industry, about the impact of Facebook within the business world. Paul is a graduate of the University of Michigan with dual degrees in Electrical Engineering and Computer Science.

### **Mike Hundert**

Mike Hundert, Chief Executive Officer and Chief Creative Officer at REM Eyewear has celebrated 34 years in the eyewear business. He is considered an expert on the industry's supply chain, a result of his three decades designing, developing, and sourcing frames and sunglasses for the company, including the brands of Converse, John Varvatos, Jones New York, Lucky Brand, Jonathan Adler, Spine, and Tumi. Hundert is Vice Chair of the Vision Council and is the current chairman of the organization's Executive Summit. Mike Hundert, and his sister Donna are second-generation owners of Rem Eyewear. Mike is currently also serving the industry as the Vice Chair of the Vision Council.

### **April Jasper, OD**

Dr. April Jasper is in private practice in West Palm Beach, Florida. She is a fellow of the American Academy of Optometry. She is Trustee for the Florida Optometric Association. She is a Vision Source Administrator. She graduated from Nova Southeastern.

### **Mark Johnson, LDO, ABO, NCLE**

2009 to present-Director of Optical Services for Virginia Eye Institute, 1997 to 2009 - Business Manager of Eye Services, Fallon Clinic, Massachusetts., ABOC and NCLEC since 1994

**Rebecca Johnson**

Rebecca Johnson is the Founder and President of EyeTrain4You, an ophthalmic staff coaching and development company. She began working in eye care in 1983, achieving certifications as Paraoptometric Technician, Ophthalmic Technician, and Ophthalmic Executive. She is an enthusiastic speaker who has presented over 300 education and motivational courses throughout the United States and Canada. In addition to speaking, Rebecca has published numerous industry articles and is the Editor of the Self Study Course for Paraoptometric Certification, Third Edition. Her ophthalmic training career began in 1992 as Director of the Ophthalmic Assistant Program at Carver Career & Technical College. Since then, she has held positions as Education Director at the Virginia Eye Institute, Director of Training at Eyefinity and Staff Education Director of OD Excellence.

Rebecca has served on the AOA Paraoptometric Council, is the recipient of the American Optometric Association Paraoptometric Special Service Award and is a past honoree of Vision Monday's 'Most Influential Women in Optical'.

**Mary Pat Johnson**

Mary Pat Johnson is a Senior Consultant with Corcoran Consulting Group. She has been in the field of ophthalmology since 1985. Her most recent clinical position was with the department of ophthalmology at Loma Linda University as a nursing/clinic supervisor. In 1992, Mary Pat joined Corcoran Consulting Group. She is a Certified Professional Medical Auditor (CPMA) and a Certified Professional Coder (CPC) by the American Academy of Professional Coders. She has also obtained the Certified Ophthalmic Executive (COE) designation. Mary Pat brings a variety of clinical and administrative experience. She maintains her certification as a Certified Ophthalmic Medical Technologist (COMT) and continues to enjoy the clinical aspects of ophthalmology. She teaches continuing education courses and workshops at local, regional and national meetings.

**Paul Karpecki, OD**

Dr. Karpecki graduated from Indiana University and completed a fellowship in Cornea and Refractive Surgery at Hunkeler Eye Centers in affiliation with the Pennsylvania College of Optometry in 1994. He currently works at the Koffler Vision Group in cornea services and ocular surface disease research. He has lectured in over 400 symposia covering four continents and is one of the first optometrist to be invited to both the Delphi International Society at Wilmer- Johns Hopkins that includes the top 25 dry eye experts in the world, and the National Eye Institute's dry eye committee. This was a task force established by the U.S. Department of Health and Human Services to better understand and treat dry eye disease in women. A noted educator and author, Dr. Karpecki presently serves on 8 professional journal editorial boards.

**Won Kim**

Won Kim is the Head of Brand Partnerships and Creative Studio at Digg. In his current role, Won is responsible for revenue growth, brand relationships and creating engaging content. Prior to joining Digg, Won helped lead brand strategy and launch the ESPN social channels. He loves New York City and the great outdoors. He enjoys living in juxtaposition.

**Jim Kirchner**

Dr. Kirchner was the founder of EyeCare Specialties, a multi-doctor, multi-office Optometric practice in Lincoln and Beatrice, Nebraska where he was the senior partner and Chief Strategic Officer. He predominately concerned himself with Primary Care Optometry, with an emphasis in contact lenses and the treatment of eye diseases.

Dr. Kirchner led EyeCare Specialties into adopting electronic health records over a decade ago when the whole arena of electronic office management and electronic medical records was just emerging. He is an Optometric lecturer, author, and consultant. In April 2010, Dr. Kirchner accepted the position of Chief Professional Officer for Eyefinity/OfficeMate, a VSP Global company. In September of 2012, he joined SynergEyes, Inc., an international manufacturer and distributor of contact lenses as their Senior Vice President, of Clinical and Professional Services. On July 10th, 2013 he accepted the position of President & CEO of SynergEyes.

He has taken an entrepreneurial role in many business ventures inside and out of Optometry. He has been President and CEO of thirteen different startup companies beyond his Optometric practice and founder of eight, ranging from a local weekly newspaper to restaurants.

Dr. Kirchner has taken a very active role in State, Regional and National Optometric Associations throughout his career.

He is a Past-President of the Nebraska Optometric Association and the North Central States Optometric Council; a ten state regional Optometric Association.

Dr. Kirchner served on the Nebraska Board of Optometry, the licensing and regulation agency of the Nebraska Department of Health, the Health and Human Services Division for nine years, the last four years as its Chairman.

Dr. Kirchner served as Chair of the American Optometric Association's Communications Group Executive Committee for four years. He had previously Chaired the AOA's Vision USA committee as well as chairing numerous AOA committee's and task forces.

He has served as the Nebraska Optometric Association's Chair of the Legal-Legislative Committee as they successfully passed glaucoma legislation for Optometry in the early 1990's.

Dr. Kirchner has served as an adjunct preceptor instructor for the Indiana University College of Optometry and the Pacific College of Optometry.

He was named "Optometrist of the Year" in 1996 by the Nebraska Optometric Association. Most recently in 2008, Dr. Kirchner was honored by receiving the Nebraska Optometric Association's "Distinguished Service Award", for lifetime work and achievement on behalf of the profession.

Dr. Kirchner has served on the Board and Executive Committee of Lincoln's Symphony Orchestra, as well as the Board of the Lincoln Municipal Band. During the 2006-2007 Symphony season, he served as VP of Special Projects for the Lincoln Symphony Orchestra.

From 2000-2006 Dr. Kirchner served on the Board of the Lincoln Crisis Pregnancy Center of Lincoln.

Currently, he is serving as President of Kingdom's Harvest International, a non-denominational Christian ministry dedicated to indigenous holistic church planting in nations worldwide, with primary focus on India and Ethiopia.

Dr. Kirchner and his wife, Dee are members of the First Evangelical Free Church of Lincoln. He has served as a small group leader for one his church's Life Groups.

Dr. Kirchner and Dee have two grown children and two granddaughters. In addition to family and work, Dr. Kirchner likes to play golf.

#### **Eric Kuan, Webmaster Outreach Specialist**

Eric is a native Texan who graduated from The University of Texas with a degree in Management Information Science. He has been working at Google for 4 years and started his career with the Search Quality team fighting web spam. He now spends his time helping webmasters create great websites and holistically improving the web ecosystem.

#### **Jerome Legerton, OD**

Dr. Legerton is an accomplished author, lecturer, vision scientist and consultant to the ophthalmic industry. He is an inventor on 48 issued US patents and more than sixty patents pending for multifocal, aberration blocking, hybrid and scleral contact lenses, refractive surgery, corneal refractive therapy, contact lenses for refractive error regulation, contact lenses for wearable displays, protective lighting, humanitarian eyewear and diagnostic devices. He is a founder of SynergEyes, Inc. and co-inventor of Paragon CRT and NormalEyes mini-scleral

lenses. During his 26 years in the private practice of optometry he specialized in low vision and contact lenses.

He served as Benedict Professor, Practice Management for the University of Houston, College of Optometry and serves on the editorial board for Primary Care Optometry News and as a Contributing Editor for Review of Optometry. He was honored with the Outstanding Achievement Award by the American Optometric Association for his contribution to the field of Contact Lens and Corneal Care and with the 2010 Achievement Award by the Orthokeratology Academy of America.

### **Anne Marie Luthro**

Anne Marie Luthro, Principal of AML Insights has spent the last twenty years focusing a critical eye and a keen ear on all things retail and shopper-centric by studying the environmental factors that influence purchasing decisions as well as the psychology of shopping behavior.

Prior to opening AML Insights, Anne Marie Luthro was Vice President of Envirosell, the agency that defined shopper insight research. From its inception Envirosell developed, practiced and fine-tuned observational and participant observation research methods. Today she uses that historical perspective to help clients build, nourish and keep their shopper base.

Anne Marie's experience has extended across numerous categories; beauty, technology, apparel, luxury, sport performance and their various retail faces. Her client list includes: adidas, Athleta, Estée Lauder Companies, L'Oreal, LVMH, Victoria's Secret, Walmart, Oakley, and ESPN.

Specific to the optical industry Anne Marie has lead numerous projects:

She previously contributed to Vision Source via consulting and speaking tours. She studied the provider's relationship to the patient as the patient evolves into a shopper and consumer. By helping the provider to understand that process she illustrated understanding of the "front of house" and how to optimize retail selling space.

For Luxottica, Anne Marie led a global study for Luxxotica Corporation and Lenscrafters USA regarding the role of digital signage at retail. She helped to determine where, when and how it made sense for Luxxotica to invest in digital signage to support sales of its brands and products.

Oakley required qualitative and quantitative research of shopper behavior in independent and chain sport retailers as well as in at its own stores and new concept stores. The resulting research helped identify how the brand lives, thrives and dominates in its numerous environments.

Anne Marie believes that a shopper knows best what a shopper wants most.

**Valerie Manso**

Valerie is the President of Manso Management Resources, Inc., a training and development company specializing in the ophthalmic industry. Additionally Valerie works with VSP Vision Care as Regional Vice President of Strategic Eyecare Partnerships.

**Mark Mattison-Shupnick, ABOM**

MARK MATTISON-SHUPNICK, A.B.O.M., B.S. directs the continuing education program for 20/20 Magazine and Vision Monday, Jobson Medical Information LLC, the largest trade publisher in the ophthalmic industry.

**Mark McKenna**

Mark McKenna is vice president and general manager, U.S. Vision Care division, Bausch + Lomb. He was named to this post in March 2014.

Mr. McKenna has extensive medical device and eye health industry experience spanning a wide variety of sales, marketing, strategy, and customer-facing roles in which he consistently increased company value and delivered business results.

At Bausch + Lomb, Mr. McKenna has responsibility for the company's full suite of contact lenses, which include such brand names as Bausch + Lomb ULTRA®, Biotrue® ONEday, PureVision®, and SofLens®. Since 2014, he has led the successful transformation of the iconic brand reversing nearly a decade of declining sales and share loss. By invigorating the product portfolio, Mr. McKenna led the business to 46% growth making the company the fastest growing contact lens company in the U.S.

Mr. McKenna joined Bausch + Lomb in 2006 after several years in the sales organization at Johnson & Johnson's Vision Care division, Vistakon. He then held positions of increasing responsibility in Bausch + Lomb's sales and marketing division, including serving as Head of U.S. sales where he exceeded sales forecasts and managed the successful launch of several new products.

Mr. McKenna holds an MBA from Azusa Pacific University and has a bachelor's degree in marketing from Arizona State University.

He is based at the company's headquarters in Bridgewater, New Jersey.

**Scot Morris, OD**

Dr. Morris received his doctorate of optometry at IU in 1996. He then completed a residency in ocular disease at Triad Eye Medical Clinic in association with NSU School of Optometry in

## International Vision Expo & Conference East 2016 – Speaker Biographies

Tulsa, OK. He is the director of Morris Education & Consulting Associates and the Eye Consultants of Colorado. He is also a member of the AOA, COA, and the FAAO. He lectures extensively throughout the U.S. on various ocular conditions for multiple pharmaceutical and ophthalmic equipment companies. He is the Chief Optometric Editor for Optometric Management. He has also published extensively in multiple ophthalmology and optometry journals, newsletters and book chapters.

### **Carol Norbeck**

Carol has been dedicated to the advancement of better opticianry throughout her career as both a successful owner of an optical retail chain and being a recognized international speaker and sales trainer. Her enthusiasm and knowledge of our rapidly changing optical industry has made her a favorite of those who have attended her presentations.

### **Vitor Pamplona**

TBD

### **Laurie Pierce, LDO, ABOM, NCLC**

Ms. Pierce is an Instructor in the Opticianry program at Hillsborough Community College in Tampa, Florida. Laurie is a graduate of Newbury College's opticianry program in Boston, and managed Lugene Opticians, an upscale optical boutique in Boston's Copley Place. Ms. Pierce lectures extensively on optical theory and management topics at local, regional and national optical conferences. Ms. Pierce is an ABO Master Optician and is certified by the National Contact Lens Examiners. She received the National Federation of Opticianry Schools Educator of the Year award in 2003, and was named one of America's Most Influential Women in optical by Vision Monday, 2010.

### **Thomas Quinn, OD**

Dr. Quinn is in group practice in Athens, Ohio. He is the immediate past chair of the American Optometric Association's Contact Lens and Cornea Section Council; a diplomate of the Cornea, Contact Lens and Refractive Technologies Section of the American Academy of Optometry; an advisor to the Gas Permeable Lens Institute (GPLI); chair of the EastWest Eye Conference; and a co-administrator for Vision Source with his wife, Dr. Susan Quinn.

In addition to private practice, Dr. Quinn serves as clinical assistant professor for The Ohio University College of Medicine and is a contributing editor for the magazine Contact Lens Spectrum.

### **Joseph Quitoni**

Mr. Joseph Quitoni is an international speaker, advises organizations on culture transformation and is experienced in driving and improving employee engagement. He has over a decade of service with The Ritz-Carlton and has earned his graduate degree in Industrial/Organizational

Psychology. During his career, Joseph served as Director of Human Resources at two Ritz-Carlton hotels where he played an integral role in driving employee engagement and was able to see dramatic increases in overall engagement year after year. He also received the Human Resources Award of Excellence from The Ritz-Carlton Hotel Company two times for his outstanding work performance. Joseph is passionate about motivating others and understanding what drives human behavior in the workplace. When he is not traveling around the world, he enjoys living on the beach in sunny Southern California—where he takes advantage of the outdoor activities in the summer and escapes to the mountains to ski in the winter.

**Joe Rappon, OD, MS, FAAO**

Dr. Joe Rappon is Global Program Head for the Vision Care Research & Development Franchise for Alcon, the eye care division of Novartis.

Dr. Rappon leads a multidisciplinary team of functional experts focused on securing global regulatory approval, market access and optimized commercial value of programs for which he is responsible. Over his 10-year career with Novartis and Alcon, he has held multiple roles, spanning several functional areas, including Clinical and Medical Affairs.

Dr. Rappon received his Doctor of Optometry (OD) degree and a Master of Science degree in Vision Science from the State University of New York (SUNY) College of Optometry. He completed a hospital-based, primary eye care residency at a Veterans Affairs Medical Center in the United States, and practiced Optometry at a surgical co-management center and in private practice prior to joining Novartis in 2005.

Dr. Rappon is a fellow of the American Academy of Optometry (AAO) and is board certified by the American Board of Optometry. He is a recipient of the Georgia Optometric Association (GOA) Young OD of the Year Award and the AAO Julius F. Neumueller Award in Optics.

**Travis Reed**

Travis is the owner and CEO of Creative Visionary, Inc. Travis was the former merchandiser for Macy's, Cartier, Lord & Taylor, and was director of creative marketing at the International Academy of Design and Technology.

**Michael Rothschild, OD**

Mike Rothschild, OD is founder of Leadership OD, a company dedicated to excellence in optometric practice. He is an international practice management speaker and presenter, most well-known for his innovative "Leadership Team" approach towards practice management (focusing on developing the leadership skills of staff to collectively manage the practice). He lectures frequently on team building and practice communications, and consults with practice owners in every phase of business growth, from startups to seasoned veterans.

**John Rumpakis, OD**

Dr. Rumpakis is currently President & CEO of Practice Resource Management, Inc., a firm that specializes in providing a full array of consulting, appraisal, and management services for healthcare professionals and industry. He has developed some of the leading web-based software applications for the medical/eye care field such as ReimbursementPLUS' ([www.ReimbursementPlus.com](http://www.ReimbursementPlus.com)), the industry leading internet-based CPT Code Information and Reimbursement software program and WhatsMyPracticeWorth.com' ([www.WhatsMyPracticeWorth.com](http://www.WhatsMyPracticeWorth.com)), a dynamic online practice appraisal tool. He is also the founder of Opt-ED' Professional Continuing Education ([www.Opt-ED.com](http://www.Opt-ED.com)) which creates and delivers top tier continuing education around the country as well as Opt-IN' which provides optometric marketing and promotional services. Named the Chief Medical Coding Editor for Review of Optometry, he has been extensively published on the topics of third party coding & billing, practice management, team building, maximizing effectiveness and profitability, including the textbook 'Business Aspects of Optometry'. Dr. Rumpakis is a popular lecturer both nationally and internationally. In addition to having had a successful solo practice, Dr. Rumpakis developed the practice management curriculum at Pacific University College of Optometry and taught optometric & medical economics there for over a decade. A 1984 graduate of Pacific University College of Optometry, he currently serves as Vice-Chair of AOA's Optometry's Meeting' Executive Committee, was the primary architect of the AOA Advantage program, and has served as chair for the Student Debt Special Project Team, the Gold Disk Project Team, and the Practice Perpetuation Project Team.

**Jack Schaeffer, OD**

Dr. Jack Schaeffer practices in Birmingham, Alabama where he is also president of a 11 location group practice and a refractive laser center. Dr. Schaeffer lectures internationally, serves on many industry boards and advisory panels, and is involved with many clinical studies on contact lenses, pharmaceuticals and equipment. Dr. Schaeffer also serves as chairman of the contact lens and cornea section of the American Optometric Society.

**Louise Sclafani, OD**

Louise A. Sclafani, OD, FAAO, a 1989 alumna of ICO, began her career at the University of Chicago in 1993 where she is an Associate Professor of Ophthalmology and Director of the Optometry. Her main interests include contact lenses, corneal disease, eye trauma and refractive surgery. She was awarded the status of Diplomate by the American Academy of Optometry in the cornea and contact lens section and is a frequent lecturer on these topics. She is the 1998 recipient of the IOA Young Optometrist, earned the Residents excellence in Teaching Award in 1995, the Outstanding Lecturer Award in 2001 from the University of Chicago, the 2002 Roger Kame Contact Lens Award, the 2004 Excellence in Education Award from the Illinois College of Optometry, and was invited to be a Distinguished Practitioner in the National Academies of

Practice. She is a frequent contributing author for Review of Contact Lenses, Contact lens Spectrum, and Primary Care Optometry News. In 2008 she received the Illinois Optometrist of the Year and was selected by Review as one of the Top 10 Females at the Forefront of Optometry. She has served on the Illinois State Board, is a Past-President of the Illinois Optometric Association, and is the Immediate Past Chair of the Cornea and Contact Lens Section for the AOA. She is on the advisory panels and speakers bureau for several drug and contact lens manufacturers and is a consultant for the NHL Chicago Blackhawks. She resides in Chicago with her husband Jeff McClimans and son, Liam.

**Peter Shaw-McMinn, OD**

Peter G. Shaw-McMinn, O.D., is an assistant professor of Clinical Studies at the Southern California College of Optometry. He is the senior partner of Sun City Vision Center, a group practice including five optometrists. Dr. Shaw-McMinn is a consulting editor to several publications and co-author of Eyecare Business: Marketing and Strategy, and Diagnosis and Management of Computer-related Vision Problems, and Eyecare Practice Toolkit, and contributed to the Clinical Manual of Contact Lenses published by Elsevier.

**Pia Taveras, Product Engineer at ClearVision Optical**

Ms. Taveras is a Product Engineer at ClearVision Optical in Hauppauge, New York. She is a graduate of Stony Brook University with both a bachelor's degree and master's degree in mechanical engineering. Ms. Taveras was introduced to additive manufacturing during her studies, enabling her to establish a prototyping sector within ClearVision's Product Development Department. She is an additive manufacturing enthusiast and a skilled user in multiple computer aided design programs, including SolidWorks and AutoCAD.

**William Tullo, OD**

Bill Tullo, OD is the Vice-President of Clinical Services for TLC Laser Eye Centers. Dr. Tullo received his undergraduate degree at State University of New York Stony Brook and his doctorate in Optometry from State University of New York College of Optometry. He has served as Assistant Clinical Professor for tens years specializing in cornea and contact lenses and is currently Adjunct Assistant Clinical Professor at SUNY state College of Optometry. He has maintained a private practice in his hometown Princeton, New Jersey over the past two decades. Dr. Tullo lectures extensively internationally on refractive surgery, cornea and child abuse. Dr. Tullo is a Diplomate of Cornea Contact Lens and Refractive Surgery of the American Academy of Optometry and a member of the American Optometric Association.

**Michael Vitale, ABOM, LDO, NCLEC**

Michael Vitale currently holds the position of Lens Division Liaison for The Vision Council and has been in the optical industry since 1977. Michael holds a Masters in Ophthalmic Optics through the American Board of Opticianry, and is a licensed optician whose experience

## International Vision Expo & Conference East 2016 – Speaker Biographies

encompasses all phases of the optical industry, with a focus on ophthalmic lenses and laboratory operations. He also serves as a technical expert for ANSI, ISO, ASTM and various other standards groups. Michael is a well-respected industry speaker, often invited to present at major trade shows and other industry events. In addition, he shares his expertise via continuing education courses provided to the optical industry by The Vision Council, various state optometric associations, and optical laboratories.

### **Phernell Walker, ABOM, NCLEC**

Mr. Walker is a nationally recognized speaker and author of the text-book is, Pure Optics. He is a Master in Ophthalmic Optics, a graduate of Hillsborough Community College with an Associate in Science Degree in Opticianry and National Contact Lens Examiners Certified. Recipient the Beverly Myers Achievement Award, for his contribution to Ophthalmic Optics in September 2011.

### **Jerry Warner**

Jerry serves as CooperVision's President, North America. Before accepting this position in May 2015, he was Senior Vice President of Global Marketing. Prior to joining CooperVision, Jerry spent 17 years at Bausch + Lomb in a variety of marketing and management roles, his last two years as General Manager of the global contact lens business. He has extensive global and domestic experience in the medical device, pharmaceutical, and consumer package goods categories. Before joining Bausch + Lomb, Jerry was associated with Bristol Myers Squibb in a variety of sales, marketing and trade marketing roles, achieving success not only at the territory level, but also in sales management roles. Jerry's leadership and successes have been recognized at the highest level, including twice receiving the CEO Award. Jerry holds a BS in Business Administration from Villanova University and an MBA from the University of Rochester's Simon School of Business.

### **Robert Warner**

TBD

### **Hal Wilson**

Hal is the co-founder of CyberImaging, Inc., a leading provider of imaging solutions for cosmetic and optical applications. He led the company to successfully introduce a hairstyle imaging application in 1996 that is used in salons, cosmetology schools, hair replacement centers and to support product manufacturers such as L'Oreal, Clairol, Laboratories Garnier and Finesse. In 2006, the Company extended their core imaging techniques to measurement and simulation tools for optical retailers. The company also developed the first Virtual Try On and E-Commerce Toolkit for eyecare professionals.

### **Richard Winig**

Co-President & Co-Founder of Eye Designs, LLC

Offer comprehensive office and optical design services  
Designed thousands of ophthalmic offices worldwide  
Located in 103,000 square feet in Collegetown, PA with national representation  
Complete in-house manufacturing  
Past speaker at many industry ophthalmic trade meetings and Optometric schools  
Holds over 50 patents on merchandising display technology  
Part of V.S.P. Global group of companies

**Stephanie Woo, OD**

Dr. Stephanie L. Woo was born and raised in Lake Havasu City, AZ. She graduated Summa Cum Laude from the University of Arizona and graduated with honors from the Southern California College of Optometry. She completed a Cornea and Contact Lens Residency at the University of Missouri, St. Louis. She is the recipient of the Gas Permeable Lens Institute Award for Clinical Excellence and also the John R. Griffin Award for Excellence in Vision Therapy. Dr. Woo is a Fellow of the American Academy of Optometry and a Fellow of the Scleral Lens Society. She authors the Gas Permeable Lens Expert column in Review of Contact Lenses, and frequently authors articles for Contact Lens Spectrum. Dr. Woo currently serves as the Public Education Chair of the Scleral Lens Society. Dr. Woo enjoys lecturing around the world on the subject of contact lenses and anterior segment disease. Dr. Woo is part owner of a 3 location private practice in Lake Havasu City, Arizona.

**Mark Wright, OD**

In 1980, Dr. Wright purchased an optometric office that was open two half days a week and created Professional VisionCare which became a 9 doctor, three location, full scope optometric practice which he sold in 2008. Currently, he is the CEO of Pathways to Success and the Director of the Bennett/VSP Business Management Program at The Ohio State University College of Optometry. Dr. Wright is the Professional Editor of Review of Optometric Business ([www.reviewob.com](http://www.reviewob.com)). Dr. Wright was the 2005-2006 Benedict Visiting Professor for the University of Houston College of Optometry. Dr. Wright was the 1985 Young Optometrist of the Year for the State of Ohio and has served as Zone Governor of the Central Ohio Optometric Association, chair of the Ohio Optometric Association Pediatric Committee, chair of the Association of Practice Management Educators, and as liaison between the Ohio Optometric Association and the Ohio Department of Health, the Ohio Department of Education and Medicare.

**Alex Yoho, ABOM**

Alex Yoho has worked in Optometric offices, Retail Optical, and Optical Laboratories, since 1974. Alex is a Master in Ophthalmic Optics certified by ABO. Having a diverse background in several facets of our industry has qualified Alex to speak at meetings of all three "O"'s from coast to coast and a number of special presentations for Universities. Currently consulting with Laboratories with employee and customer education, Lab Safety, R&D, and special projects.

**Vince Young, MD**

General Ophthalmologist for 25 years, Chairman, Division of Ophthalmology, Albert Einstein Medical Center in Philadelphia, Specializing in cataracts, glaucoma.

**Adam Ziegler**

Adam has been with Google for 3.5 years and has advised hundreds of businesses, large and small, on techniques to increase online presence and profitability through digital marketing. He not only helps companies build comprehensive online advertising strategies with Google Adwords, but also teaches ways to measure website performance using Google Analytics. He currently works to support and grow strategic content partners on YouTube, and he has a deep understanding of online video trends. Adam is a graduate from the University of Wisconsin-Madison's School of Business.

**Dave Ziegler, OD**

Dr. Dave Ziegler is a 1981 graduate of the Southern California College of Optometry. He is a Fellow of the American Academy of Optometry and the senior partner in a group private practice in Milwaukee, Wisconsin. He is on Essilor's advisory panel and has been on advisory panels for VisionWeb and Vistakon. As an associate clinical professor to the Southern College of Optometry and Pacific University College of Optometry, he teaches fourth year optometry students at his office. Dr. Ziegler does clinical research for Vistakon, Allergan, Bausch and Lomb, and CIBA. He has published and lectured on a variety of topics ranging from peripheral retinal disease, contact lenses, and practice management. He is the team optometrist for professional cycling teams, Milwaukee Wave Professional Indoor and Outdoor Soccer Teams, and the Milwaukee Brewers.

**Reports/Information Tab 7 a & b**

**Administrative Report – April Koon**

**a. Licensee Totals**

Total of all licensees – 533

Instate licensee total – 450

Out-of-state licensee total – 83

Total of all apprentices – 105

**b. S.C. Practical Examination**

June 6, 2016 Exam total – 1

Tab 7 C

Opticianry Board DB0018	June 2014 Cash Balance	June 2015 Cash Balance	Dec 2015 Cash Balance
	<u>FY14</u>	<u>FY15</u>	<u>FY16</u>
Beginning Cash Balance	(141,663.85)	(115,730.44)	(229,633.31)
Total Revenue	125,065.00	9,495.53	124,540.00
Total Direct Expenditures	(57,450.28)	(73,322.55)	(29,232.02)
Indirect Expenditures (Overhead):			
Admin/Dir/Adv Cou- Based on Previous	.791% (19,004.26)	(24,230.62)	(9,814.33)
POL Admin - Based on Previous Yr	.791% (2,052.41)	(8,253.04)	(3,466.80)
OLC - Former POL Program	0.00	0.00	0.00
OIE - Based on No. of Investigations	.074% (3,778.58)	(2,508.45)	(1,145.86)
Legal - Based on No. of Investigations	.074% (1,319.02)	(901.88)	(414.76)
Office of Business Services - Based on	(5,808.67)	0.00	0.00
Office of Health & Medical Rel Bds -	0.000% 0.00	0.00	0.00
Remittance to General Fund - Proviso	10.00% (5,745.03)	(7,332.26)	0.00
Communications-Based on Prev Yr Exp	.791% (1,545.35)	(1,867.45)	(497.13)
Immigration Proviso 81.8-Based on Prev	.791% (1,414.48)	(1,536.78)	(398.39)
Osha Proviso 81.7-Based on Prev Yr Exp	.791% (2,851.51)	(3,445.37)	0.00
Total Indirect Expenditures (Overhead)	(43,519.31)	(50,075.85)	(15,737.27)
NET	24,095.41	(113,902.87)	79,570.71
Fines Draw	1,838.00		
Year End Balance	(115,730.44)	(229,633.31)	(150,062.60)



South Carolina Department of Labor, Licensing and Regulation  
**South Carolina Board of Examiners in Opticianry**  
P.O. Box 11329 • Columbia, SC 29211  
Phone: 803-896-4681 • Fax: 803-896-4719  
[www.llr.state.sc.us/POL/Opticians/](http://www.llr.state.sc.us/POL/Opticians/)



**XXXX OFFICIAL BOARD MEMBER ELECTION BALLOT**  
**This is an Election to Fill XXXX Board Member Seats**

Candidate nominations for Board member election have been made to the South Carolina Board of Examiners in Opticianry by written petitions signed by the required number of licensed opticians qualified to vote. Please use this Ballot to cast your votes; the nominees are in alphabetical order. Enclosed candidate information is provided by the individual.

*Only South Carolina licensed opticians are eligible to vote.*

*Please attest to having a current South Carolina license to practice Opticianry by checking the following statement.*

       *I am a South Carolina licensed optician.*

**Vote for XXXX candidates to fill three seats on the Board.**

**Cast each vote by placing a checkmark next to candidate's name.**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Write-in Candidate:

\_\_\_\_\_

**Please return the Official Ballot in the envelope provided.**

Mail to:  
SC Opticianry Board  
PO Box 11329  
Columbia, SC 29211

Ballots may also be hand delivered to the Board's office; location listed above.

***Only an Official Election Ballot can be used to cast a vote. A faxed ballot will NOT be accepted. A copy of the ballot will NOT be accepted.***

**DEADLINE:** Only ballots postmarked on or before **June ????, 2015** will be counted in this election. Ballots hand delivered to the Board's office will be accepted until 5:00 P.M. on June ???, 2015.



South Carolina Department of Labor, Licensing and Regulation  
**South Carolina Board of Examiners in Opticianry**

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[www.llronline.com/POL/Opticians/](http://www.llronline.com/POL/Opticians/)



### **Registered Apprenticeship Training in Ophthalmic Dispensing**

**The apprenticeship training program requires formal optical education as well as employment. All requirements of the program must be completed to qualify to sit for the South Carolina Practical Examination in Opticianry.**

The following are required before a South Carolina optician's license can be issued:

- Passage of the American Board of Opticianry Examination (ABO) / 703-719-5800 or [www.abo-ncle.org](http://www.abo-ncle.org)
- Successful completion of the S.C. Registered Apprenticeship Program
- Passage of the South Carolina Practical Examination in Opticianry

#### **Program Requirements:**

- An applicant for the apprenticeship must be registered and approved in writing before the apprenticeship commences.
- Applicant must be a graduate of an accredited high school or have a GED Certificate.
- Applicant will need a sponsor that is a state licensed Optician, Optometrist or Ophthalmologist. Sponsor cannot train more than two (2) registered apprentices at a time.
- Applicant will need to work a minimum of 32 hours per week for **two years** under the supervision of their sponsor.
- Complete a pre-approved formal optical education program; see below for additional information.
- Renew registration annually by October 1; the renewal fee is \$50.00. Proof of attendance at four hours of Board approved continuing education (CE) is required. The S.C. Association of Opticians and other providers offer CE.

#### **PRE-APPROVED OPTICAL EDUCATION PROGRAMS:**

**Career Progression Program:** A home study education program for opticians offered through the National Academy of Opticianry (NAO). For information concerning this program contact the NAO at 800-229-4828, or [www.nao.org](http://www.nao.org), or email [sbonner@nao.org](mailto:sbonner@nao.org). Other educational materials may also be purchased through the NAO.

**Penn Foster Career School:** This is an accredited school of independent study that offers a training program for opticians. For information contact an enrollment advisor at 800-272-4410 or visit their website at [www.pennfoster.edu](http://www.pennfoster.edu).

**Durham Technical College Optical Apprentice Certificate:** An internet/classroom-based program offered through Durham Technical College located in Durham, North Carolina. For information concerning this program contact the school at 919-686-3333 or on-line at [www.durhamtech.edu](http://www.durhamtech.edu).

**Northern Alberta Institute of Technology Optical Sciences Eyeglasses Diploma:** For information visit their website at [www.NAIT.ca](http://www.NAIT.ca).

The applicant and sponsor will receive confirmation of registration in writing.



**South Carolina Department of Labor, Licensing and Regulation  
South Carolina Board of Examiners in Opticianry**

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[www.llronline.com/POL/Opticians/](http://www.llronline.com/POL/Opticians/)



**Application for Registration for Apprenticeship Training in Ophthalmic Dispensing**

**Submit the following with your application to the above address:**

- Check or Money Order for the application fee of \$20 payable to LLR - SC Opticianry Board (This is a non-refundable fee)  
A returned check fee of up to \$30, or an amount specified by law, may be assessed on all returned funds.
- Copy of drivers license, state issued ID or passport
- Copy of social security card
- Proof of high school graduation, college transcript or GED Certification
- Have sponsor complete the Request to Sponsor Apprentice Form – Once completed you may submit with your application.

Board Use Only	
Beg Date:	
Sch. Comp Date:	
Ed Program	
Check No.	
Amount	

Note for SC Residents: To find your Congressional District you may go to: <http://www.scstatehouse.gov/legislatorssearch.php>

**APPLICANT INFORMATION:**

Last Name: \_\_\_\_\_ First: \_\_\_\_\_ Middle: \_\_\_\_\_ Suffix: \_\_\_\_\_

Have you ever legally changed your name?  Yes  No Maiden Name: \_\_\_\_\_

If yes, please submit legal documentation supporting the change. (Marriage certificate, divorce decree, etc.)

Home Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ District: \_\_\_\_\_  
Congressional District (SC Residents Only)

Mailing Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
(If different than above)

Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

Place of Birth (Country): \_\_\_\_\_ Race: (for statistical purposes only) \_\_\_\_\_

Gender:  Female  Male

**EDUCATION:**

College: \_\_\_\_\_ Location (city/state or country): \_\_\_\_\_

School: \_\_\_\_\_ Date of Attendance/ Date Degree Awarded: \_\_\_\_\_

Degree: \_\_\_\_\_

**High School:**

School: \_\_\_\_\_ Location (city/state or country): \_\_\_\_\_

Year Graduated: \_\_\_\_\_ Year GED Received: \_\_\_\_\_

**EMPLOYMENT:**

Company Name: \_\_\_\_\_ Type of Facility: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Address: \_\_\_\_\_

Sponsor information will be filled out on the Request to Sponsor Apprentice form.

**PERSONAL HISTORY:**

- 1. Have you ever held any type of professional or occupational license in any state? Yes  No   
 a. If yes, list the states and types of licenses: \_\_\_\_\_
- 2. Has any licensing agency revoked, suspended, or restricted your license or disciplined you? Yes  No   
 If yes, give cause, dates and disposition in your written explanation.
- 3. Have you ever been convicted of or pled guilty or nolo contendere to a felony of any kind or to a non-felony crime involving drugs or moral turpitude (You may exclude juvenile or expunged crimes.)? Yes  No   
 a. If yes, attach a written explanation that includes cause, dates and disposition.
- 4. Do you have a mental or physical impairment or addiction that would prohibit you from safely practicing as an apprentice? Yes  No

**FORMAL EDUCATION: CHECK STATEMENT THAT APPLIES – ONE MUST BE CHECKED:**

- Applicant will enroll in the National Academy of Opticianry Career Progression Program.
- Applicant will enroll in the Durham Technical College Optical Apprentice Certificate Program.
- Applicant will enroll in the Penn Foster Career School.
- Applicant will enroll in the Northern Alberta Institute of Technology Optical Sciences Eyeglasses Program.
- Applicant will submit another formal optical education program for pre-approval by the Board.

**IMPORTANT:** A formal optical education program *pre-approved* by the Board is **REQUIRED** to be successfully completed before an apprentice can qualify to sit for the South Carolina Practical Examination in Opticianry.

**PRIVACY DISCLOSURE:**

*South Carolina Law requires that every individual who applies for an occupational or professional license provide a social security number for use in the establishment, enforcement and collection of child support obligations and for reporting to certain databanks established by law. Failure to provide your social security number for these mandatory purposes will result in the denial of your licensure application. Social security numbers may also be disclosed to other governmental regulatory agencies and for identification purposes to testing providers and organizations involved in professional regulation. Your social security number will not be released for any other purpose not provided for by law.*

Other personal information collected by the Department for the licensing boards it administers is limited to such personal information as is necessary to fulfill a legitimate public purpose. The South Carolina Freedom of Information Act ensures that the public has a right to access appropriate records and information possessed by a government agency. Therefore, some personal information on the application may be subject to public scrutiny or release. The Department collects and disseminates personal information in compliance with The South Carolina Freedom of Information Act, the South Carolina Family Privacy Protection Act, and other applicable privacy laws and regulations. Additionally, the Department shares certain information on the application with other governmental agencies for various governmental purposes, including research and statistical services.

**Certification:**

I, the named applicant, certify that all information contained in this application is truthful, complete, correct, accurate, and agree that such information is subject to verification by the Board. I understand the requirement of employment, along with **COMPLETING A FORMAL OPTICAL EDUCATION** program from a Board approved provider, and the limitations of being a South Carolina Apprentice in Ophthalmic Dispensing. I am aware that if an investigation should discover inaccurate or misleading information, my application will be rejected, my apprenticeship terminated, and all fees forfeited.

Signature of Applicant: \_\_\_\_\_

Date: \_\_\_\_\_



STATE OF SOUTH CAROLINA  
DEPARTMENT OF LABOR, LICENSING AND REGULATION  
**VERIFICATION OF LAWFUL PRESENCE IN THE UNITED STATES  
AFFIDAVIT OF ELIGIBILITY**



Pursuant to Section 8-29-10, *et seq.* of the South Carolina Code of Laws (1976, as amended), the Department of Labor, Licensing and Regulation must verify that any person who applies for a South Carolina license is lawfully present in the United States. Complete and sign this affidavit of eligibility. The information provided is subject to verification.

**Section A: LAWFUL PRESENCE in the United States.**

The undersigned \_\_\_\_\_, of \_\_\_\_\_  
(Print clearly First, Middle, and Last name) (Home Address, City, State, and Zip Code)

being first duly sworn deposes and states as follows:

**Check only one box:**

1.  I am a United States citizen; or
2.  I am a Legal Permanent Resident of the United States eighteen years of age or older; or
3.  I am a Qualified Alien or non-immigrant under the Federal Immigration and Nationality Act, Public Law 82-414, eighteen years of age or older, and lawfully present in the United States.
4.  Other: \_\_\_\_\_ Please submit any documentation that supports this status.

Date of Birth: \_\_\_\_\_

Alien Number: \_\_\_\_\_ I-94 Number: \_\_\_\_\_

**(If you checked number 2, 3, or 4 you must attach a copy of your immigration documents. See instruction sheet for a list of accepted immigration documents.)**

**Section B: ATTESTATION.**

**I understand that in accordance with section 8-29-10 of the South Carolina Code of Laws, a person who knowingly and willfully makes a false, fictitious, or fraudulent statement or representation in an affidavit shall, in addition to other sanctions imposed by this State or the United States, be guilty of a felony, and upon conviction must be fined and/or imprisoned for not more than 5 years (or both).**

**I understand that the representations made in this Affidavit shall apply through any license(s) or renewals issued, and that I shall have an affirmative duty to immediately advise the Department of Labor, Licensing and Regulation of any change of my immigration or citizenship status.**

**I swear and attest the information contained herein is true and correct to the best of my knowledge. I understand that under South Carolina law, providing false information is grounds for denial, suspension, or revocation of a license, certificate, registration or permit.**

\_\_\_\_\_  
Signature of Affiant

SWORN to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_  
Notary Signature

\_\_\_\_\_  
Print Name

Notary Public for \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

## **INSTRUCTION SHEET FOR COMPLETING AFFIDAVIT OF ELIGIBILITY**

**CHECK box 1:**

If you are a United States Citizen by birth or naturalization

**CHECK box 2:**

If you are a Legal Permanent Resident and you are not a U.S. Citizen, but are residing in the U.S. under legally recognized and lawfully recorded permanent residence as an immigrant.

**PROVIDE A COPY OF ALL IMMIGRATION DOCUMENTS.**

**CHECK box 3:**

If you are a Qualified Alien. You are a Qualified Alien if you are:

An alien who is lawfully admitted for residence under the INA.

An alien who is granted asylum under Section 208 of the INA.

A refugee who is admitted to the United States under Section 207 of the INA.

An alien who is paroled into the United States under Section 212(d)(5) of the INA for a period of at least 1 year.

An alien whose deportation is being withheld under Section 243(h) of the INA (as in effect prior to April 1, 1997) or whose removal has been withheld under Section 241(b)(3).

An alien who is granted conditional entry pursuant to Section 203(a)(7) of the INA as in effect prior to April 1, 1980.

An alien who is a Cuban/Haitian Entrant as defined by Section 501(e) of the Refugee Education Assistance Act of 1980.

An alien who has been battered or subjected to extreme cruelty, or whose child or parent has been battered or subject to extreme cruelty.

**PROVIDE A COPY OF ALL IMMIGRATION DOCUMENTS.**

**ACCEPTED IMMIGRATION DOCUMENTS:**

Unexpired Reentry Permit (I-327)

Permanent Resident Card or Alien Registration Receipt Card With Photograph (I-551)

Unexpired Refugee Travel Document (I-571)

Unexpired Employment Authorization Card Which Contains a Photograph (I-766)

Machine Readable Immigrant Visa (with Temporary I-551 Language)

Temporary I-551 Stamp (on passport or I-94)

I-94 (Arrival/Departure Record) in Unexpired Foreign Passport

I-20 (Certificate of Eligibility for Nonimmigrant, F-1, Student Status)

DS2019 (Certificate of Eligibility for Exchange Visitor, J-1, Status)



**REQUEST TO SPONSOR APPRENTICE**  
**To be completed by Apprentice and Sponsor**

Apprentice Name: \_\_\_\_\_

Sponsor Name: \_\_\_\_\_ Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

License Type:      Optician              Optometrist              Ophthalmologist              License #: \_\_\_\_\_

Sponsor's Address: \_\_\_\_\_

I, the named sponsor, request the named applicant be registered under my supervision as a South Carolina Apprentice. Apprentice training to include specific skills such as:

- Assisting in selection of frames and lens options
- Fitting/adjusting frames and making frame repairs
- Interpreting prescriptions
- Making optical calculations and finishing layout calculations
- Lens neutralization and verification
- Identification of lens materials, manufacturer, and index of refraction
- Using Geneva Lens Measure, measure lens surface power
- Fitting measurements such as P.D., segment height, etc.
- Calculating effective power of a designated meridian of a compound lens
- Compensations or effective power for changes in lens vertex distance

Average number of hours to be worked per week (32 hours minimum): \_\_\_\_\_

**CHECK STATEMENT THAT APPLIES – ONE MUST BE CHECKED:**

- Applicant will enroll in the National Academy of Opticianry Career Progression Program.
- Applicant will enroll in the Durham Technical College Optical Apprentice Certificate Program.
- Applicant will enroll in the Penn Foster Career School.
- Applicant will enroll in the Northern Alberta Institute of Technology Optical Sciences Eyeglasses Program.
- Applicant will submit another formal optical education program for pre-approval by the Board.

**IMPORTANT:** A formal optical education program *pre-approved* by the Board is **REQUIRED** to be successfully completed before an apprentice can qualify to sit for the South Carolina Practical Examination in Opticianry.

**Certification:**

I, the named apprentice, certify that to the best of my knowledge the statements made in this application are true and correct, and I understand my responsibilities of work, obtaining formal education, and study. I understand the limitations of being registered as a South Carolina Apprentice.

\_\_\_\_\_  
Signature of Apprentice

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Name of Apprentice

I, the named sponsor of the named applicant, certify that to the best of my knowledge the statements made in this application are true and correct, and it is my intention to provide to the applicant optical dispensing training that includes, but is not limited to, the skills listed above. I work at the same location as the apprentice and will be accessible to him/her.

\_\_\_\_\_  
Signature of Sponsor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Name of Sponsor

\_\_\_\_\_  
SC License Type and Number

**ATTENTION ALL REGISTERED APPRENTICES!**

It is time to renew all South Carolina Registered Apprentices for 2016-2017. If you have had a legal name change, please submit a copy of the legal document(s) (i.e., copy of marriage certificate, divorce decree, court order) to the Board office for us to update your files. Check our website periodically for your name change. Once your file has been updated, you may then renew your license.

**Please note we will be opening the renewals on August 8, 2016. You may not renew before August 8, 2016.**

**You may also not renew by telephone.**

Online renewal is available twenty-four (24) hours a day. You can print a receipt for your records, confirming that you have completed the renewal process and that your VISA, MasterCard, or electronic check has been accepted. You may also use a debit card, but it must have the VISA or MasterCard logo on the front of the card. Your new pocket card will be processed and mailed within 48 hours after renewing your license or registration.

To renew your Registration on-line, go to <https://renewals.llronline.com>. You must have your User ID and Password to renew online. The User ID and Password will be provided in your Renewal Notices.

**RENEWAL DUE DATE: October 1, 2016**

**RENEWAL FEE AS FOLLOWS:**

- Apprentices renewed on or before October 1, 2016, fee is \$50. Our office does **not** accept cash for payment of your renewal. Please make all checks or money orders payable to South Carolina Board of Examiners in Opticianry.
- If renewed October 2, 2016 - October 31, 2016, a late fee of \$25 registration will be assessed.

If not renewed by October 31, 2016 the registration will LAPSE on November 1, 2016 and must be reinstated to activate. Reinstatement Fee: \$50.00 plus renewal fee if renewed after October 31, 2016 for all licenses and registrations.

- Paper Registration renewals cannot be processed without the **Renewal Form**.

**CONTINUING EDUCATION REQUIRED:**

Apprentice: 4 hours of ABO approved CE obtained since **10/01/2015**.

A random CE audit will be conducted after 11/01/2016. If selected, a notice of audit will be mailed to you requesting proof of CE to be submitted at that time. **DO NOT** send CE to the Board office unless instructed to do so.



South Carolina Department of Labor, Licensing and Regulation  
South Carolina Board of Examiners in Opticianry  
110 Centerview Dr. • Columbia • SC• 29210  
P.O. Box 11329 • Columbia • SC• 29211-1329  
Phone: 803-896-4681 • [ContactOpticianry@llr.sc.gov](mailto:ContactOpticianry@llr.sc.gov) • Fax: 803-896-4719  
[www.llronline.com/POL/Opticians/](http://www.llronline.com/POL/Opticians/)



The User ID and Password listed on this section grants access to online services provided by LLR. Please keep your User ID and Password in a secure location.

# RENEWAL NOTICE ONLY

## Web Services Wallet Card

Name: «Title» «First Name» «Middle Name» «Last Name» «Suffix»

User ID: «olrUserID»

Password: «olrpassword»

SC Registration Number: «Credential Number Only»

Renewal Website: <https://eservice.llr.sc.gov/OnlineRenewals/>

Other Online Services: <https://verify.llronline.com>

LLR Website: <http://www.llr.state.sc.us/pol.asp>

It is time to renew your annual apprenticeship registration with the Board of Examiners in Opticianry for 2016-2017. Information to renew your registration online is provided above.

## Do not return this Notice!

This is not a renewal application, only a renewal notice to assist you in renewing your registration online.

Online renewal is available twenty-four (24) hours a day. You can print a receipt for your records, confirming that you have completed the renewal process and that your VISA, MasterCard, or electronic check has been accepted. You may also use a debit card; it must have the VISA or MasterCard logo on the front of the card. Your new pocket card/certificate will be processed and mailed within 48 hours after renewing your registration online.

## ANNUAL APPRENTICESHIP REGISTRATION RENEWAL INFORMATION

- **Apprentice Optician fee is \$50 if renewed on or before October 1, 2016.**
- **If renewed October 2, 2016 through October 31, 2016, a late fee of \$25 will be assessed.**
- **If not renewed by October 31, 2016 the registration will lapse November 1, 2016 and must be reinstated to activate.**
- **If you have had a legal name change please submit a copy of the legal document(s) (i.e., copy of marriage certificate, divorce decree, court order) to the Board office prior to renewing online. A fax notification to 803-896-4719 is acceptable. Check our website periodically for your name change. Once your file has been updated, you may then renew your registration online.**
- **Continuing Education Required:** Apprentice – four (4) hours of ABO approved CE obtained since October 1, 2015. The Board will conduct a random CE audit after November 1, 2016; submit proof of CE only if requested by the Board. The Board will not maintain copies of your CE documentation. If you joined the program in 2016 you are not required to have obtained CE for this renewal.
- **Sponsorship:** Apprentices must provide written documentation that you are being continually sponsored by a state licensed Optician, Optometrist, or Ophthalmologist. Apprentices must also provide written documentation that you are working a minimum of 32 per week under the supervision of their sponsor.
- **You can verify your registration by clicking the Licensee Lookup link located on the Board's website at <http://www.llr.state.sc.us/POL/Opticians/>. Please allow 48 hours after renewing online to verify your registration.**
- **Registration renewal cannot be processed by telephone.**
- **Paper Registration renewal cannot be processed without the Renewal Form.**



**RENEWAL QUESTIONS**

Answer "Yes" or "No" to each of the following questions. If you answer "yes" to any questions below, you must attach a full written explanation.

- 1. Since you last renewed your license, have you been involved in any pre-trial intervention program, been convicted, pled guilty, or pled nolo contendere (no contest) for the violation of any federal, state or local law or do you have charges pending (other than a minor traffic violation)?  Yes  No
- 2. Since you last renewed your license, have you had an application for a professional license, examination, certification or registration denied or refused by any licensing board or other entity or have you ever surrendered a professional license?  Yes  No
- 3. Since you last renewed your license, have you developed or been treated for any disease or condition, physical, mental, or emotional (including alcohol or other substance abuse) that may render further practice dangerous to the public?  Yes  No
- 4. Since you last renewed your license, have you been addicted to or used in excess any drug or chemical substance including alcohol, or been treated for a drug or alcohol addiction or participated in a rehabilitation program?  Yes  No
- 5. Since you last renewed your license, have you had any investigation, formal complaint, disciplinary action or consent order filed against you by any person, employer, or licensing board in any jurisdiction?  Yes  No
- 6. Has there been any change in the status of your lawful presence in the United States since initial licensure?  Yes  No

I hereby swear/affirm that all statements and information contained herein are true and correct to the best of my knowledge. I further understand that false or incorrect information may result in the denial of my license issued pursuant to this application and may be subject to civil and criminal proceedings. I agree all information in this application can be verified and investigated. I have read and am familiar with the SC Code of Laws regulating Opticianry and abide by such laws.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*South Carolina Law requires the agency to collect personal information which is only disseminated as required by law. The South Carolina Freedom of Information Act ensures that the public has a right to access appropriate records and information possessed by a government agency. Therefore, some personal information on your renewal application and other documents on file may be subject to public scrutiny or release. The Department collects and disseminates personal information in compliance with The South Carolina Freedom of Information Act, the South Carolina Family Privacy Protection Act, and other applicable privacy laws and regulations. Additionally, the Department shares certain information on the application with other governmental agencies for various governmental purposes, including research and statistical services. In order to better protect the information you provide, please provide the Department with the following information that may be released to the public upon request: a public mailing address, a public email address and a public telephone number.*



**SPONSORSHIP OF APPRENTICE  
 2016 RENEWAL**  
 To be completed by Apprentice and Sponsor

Apprentice Name: \_\_\_\_\_

Sponsor Name: \_\_\_\_\_ Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

License Type:      Optician              Optometrist              Ophthalmologist              License #: \_\_\_\_\_

Sponsor's Address: \_\_\_\_\_

I, the named sponsor, state the named Apprentice has been continuously training under my supervision. Apprentice training to include specific skills such as:

- Assisting in selection of frames and lens options
- Fitting/adjusting frames and making frame repairs
- Interpreting prescriptions
- Making optical calculations and finishing layout calculations
- Lens neutralization and verification
- Identification of lens materials, manufacturer, and index of refraction
- Using Geneva Lens Measure, measure lens surface power
- Fitting measurements such as P.D., segment height, etc.
- Calculating effective power of a designated meridian of a compound lens
- Compensations or effective power for changes in lens vertex distance

Average number of hours to be worked per week (32 hours minimum): \_\_\_\_\_

**Certification:**

I, the named apprentice, certify that to the best of my knowledge the statements made in this application are true and correct, and I understand my responsibilities of work, obtaining formal education, and study. I understand the limitations of being registered as a South Carolina Apprentice.

\_\_\_\_\_  
 Signature of Apprentice

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Print Name of Apprentice

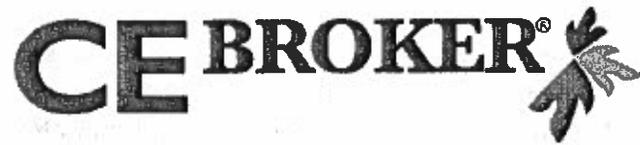
I, the named sponsor of the named Apprentice, certify that to the best of my knowledge the statements made in this application are true and correct, and it is my intention to provide to the applicant optical dispensing training that includes, but is not limited to, the skills listed above. I work at the same location as the apprentice and will be accessible to him/her.

\_\_\_\_\_  
 Signature of Sponsor

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Print Name of Sponsor

\_\_\_\_\_  
 SC License Type and Number



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# Automate & Simplify

Working with CE Broker

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## Why CE Broker

**License renewal should be simple.** Licensed professionals are always driven to learn through both professional experience and continuing education. Stressing about requirements for renewal shouldn't be part of the job description. We believe that regulating agencies should be able to lift the burden of tracking compliance off of their licensees and place it on an electronic system that converts their data into a clear list of what they've done, what they need, and when it's required.

**Simplifying CE doesn't only benefit the licensees.** Since all CE is accounted for electronically with CE Broker, audits are transformed from cluttered, paperwork-ridden investigations into quick, accurate verifications. You and your staff can spend more time advancing the interests and education of your licensees.

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## A History of Excellence

As a company that is driven by the goal of simplifying the license renewal process and impact of regulation, we have worked over 12 years to perfect solutions for licensed professionals, associations, boards, and educational providers on state and national levels.

By integrating the CE Broker tracking system with its license renewal system, the Florida Department of Health has seen over a 30% increase in CE compliance and a projected savings of \$515,000 annually.

*"Our experience with CE Broker has been exceptional. We have been a provider of continuing education since 1999. During that time we have worked with many state governments who have reporting systems, but none compare to CE Broker's system. It is easy for consumers, easy for providers to report and it has great customer service. That stability means that you get competent, accurate answers to your questions every time you call.*

*If you are a state administrator and you want to put some fairness and accountability into your state CE program, without increasing costs for your state, why not select a company with a great record."*

*- Todd Mowl, Elite CME Inc.*

# Audits Reinvented

Whether you audit your licensees at the time of renewal or as a post audit, you will now have the ability to audit 100% of your licensee population.

## Option 1 - 100% audit of CE at the time of renewal

- By using CE Broker's API, licensees can see their CE compliance status on your website. When licensees renew, your system can query our database in real-time to verify CE compliance.
- If the licensee is not in compliance in the tracking system, they must report any missing CE before they are allowed to proceed with renewal.
- Eliminates the need for any paper audit, as all information is stored in the CE Broker database and is accessible 24X7.



## Option 2 - 100% post audit

- Members demonstrate compliance prior to the audit by reporting CE to their records and attest to their completion.
- Audit staff can log in through a separate user interface to run compliance reports and review records of licensees under audit.
- Licensees who do not show compliance by the end of the biennium will be subject to a manual audit. Those that are manually audited will be granted access into the tracking system so that they can respond to the audit electronically. All supporting documentation will be gathered in CE Broker, eliminating the need for licensees to mail documentation to the auditor.
- When a licensee is deemed compliant, a "pass" letter can be automatically generated.



# Customized CE Reporting

Licensees report their hours through an easy-to-use customized interface. They submit basic info on the CE including hours, subject areas, delivery method (live, online, etc.) and how the CE was approved. Audits are quick and painless when all the information is already available!

2012 | 264,057

2015 | 945,988

Self-reporting CE is simple & trends show licensees prefer the ease of electronic reporting methods. This chart shows the growth of self-reporting through all CE Broker accounts.

# Licensee-focused Design

The licensee-focused design that the CE Broker user interface displays simplifies the process of tracking continuing education credits. With just a quick glance, licensees can see their compliance status in their dashboard, view successfully reported courses in Course History, self-report any necessary credits that they are lacking and search for approved courses right from within their account. Licensees can log in to their accounts with the *free* iPhone & Android apps to manage everything they need on the go! Plus, our full-access support center is available to answer and questions that your Board or licensees may have. We aim to make the renewal process as simple as possible for licensees.



# Educational Providers

There are many ways to approve educational providers and courses. All of this can be accommodated online through CE Broker.

## Your Board staff secure account will include:

- Paperless communications between the staff and educational providers. Messages are automatically sent, as requested, to the educational provider as the staff reviewers and approvers process each application.
- Approval queues with color-coding and reminder messages.
- Review flow where applications requiring approval can be routed to others, such as committee members or approving groups.
- Link to request additional information from the respective educational provider.
- History of requests and responses.

## Free Course Search

Approved providers can advertise courses in the CE Broker course search. Licensees can find hundreds of courses guaranteed to apply towards renewal requirements.

## Reporting Options

Having approved providers report directly into CE Broker for your licensees ensures that all course credit completed is from a valid source.

A wide range of methods is available to providers to report course completions. Options include direct online entry, file uploads, and system-to-system interfaces.

*We recommend that the Board staff specifies an amount of time in which providers must report.*



# We'll Take the Questions

Our Support Center serves your Board as well as your licensees. Having a Support Center dedicated to assisting licensees will drastically reduce calls to your staff.

## Your Board

The CE Broker Support Center performs all of the system set up & modifications for you. You only need to use the system, not configure it! Our team is ready to help your staff understand how the system works.

## Your Licensees

Your licensees may contact the CE Broker Support Center via a toll-free phone number, email, or live chat. Our Support Center hours are 8:00 a.m. to 8:00 p.m. Monday through Friday Eastern time, except for Florida State holidays.

The CE Experts are skilled and thoroughly trained on the CE Broker system. They are dedicated to providing first class customer support and will be trained on your Board's rules and requirements.

*"CE Broker has great customer service. I have always been impressed with the speed of the replies and the level of knowledge each person possesses."*

*- Ivy Hultquist, RN*

## 2015 CE Broker Support Center Stats



**Calls**  
124,792



**Live Chat**  
58,179



**Emails**  
22,383

## Marketing Support

**Let us help you spread the good news!**

Our marketing and graphic design team would love to help you craft instructional materials and awareness campaigns to help make this implementation as effective as possible. We offer custom flyers, newsletters, emails, and supportive web graphics. Any kind of marketing support is provided at no charge.

## Pricing

**We can offer you our fully-featured compliance suite at no cost:**

- CE compliance tracking
- Paperless, streamlined audits
- Promotional marketing materials
- Phone, chat and email support for educational providers, Board staff and licensees

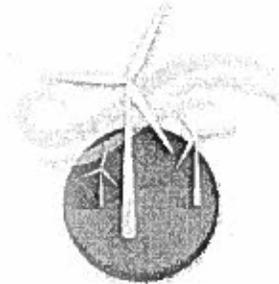
This model is funded by individual licensee subscriptions and is dependent upon clear communications from your Board. Our marketing department will work directly with you to help educate licensees on CE Broker and how they benefit from the various account options. We will not be aggressive in the marketing of our paid services and will instead focus on the benefits of our free account. As they learn more about CE Broker, we are confident licensees will voluntarily opt for the Professional or Concierge Account over time.

## Our Business Model

**These services are available at no cost to the State regulating entity, ever.** We gain revenue from licensee, business and Association-provided paid accounts (Professional, Concierge, and Business Models.) Currently, we have over **250 Business Accounts**. **13%** of the licensee population voluntarily opt to use a Professional Account.

## Certified Green Energy

CE Broker is fueled by Green-e ® certified renewable energy. The Green-e ® program certifies that the Renewable Energy Certificates we purchase meet strict environmental and consumer protection standards established by the non-profit Center for Resources Solution.



## Thank You!

We are extremely grateful you have taken the time to read through this white paper, and are eager to speak with you about simplifying continuing education management at your organization. Please contact us for a demonstration of the system.



# FMA

FLORIDA MEDICAL ASSOCIATION

P.O. Box 10269 | Tallahassee, FL | 32302

1430 Piedmont Drive E. | Tallahassee, FL | 32308

November 26, 2014

To All Interested Parties

I am pleased to write this letter of recommendation for CE Broker.

During my 17 year tenure with the Florida Medical Association, I have held several different positions including Manager of Accreditation Services, Director of Education, Vice President of Education and most recently, Senior Vice President of Education & Membership. In working with the education and membership functions of the FMA, one important responsibility has been to cultivate and foster relationships with vendors and organizations that offer services and products of benefit to our members - physicians licensed in the state of Florida. It has been my pleasure to have helped forge and now manage our vendor partnership with CE Broker for the past several years.

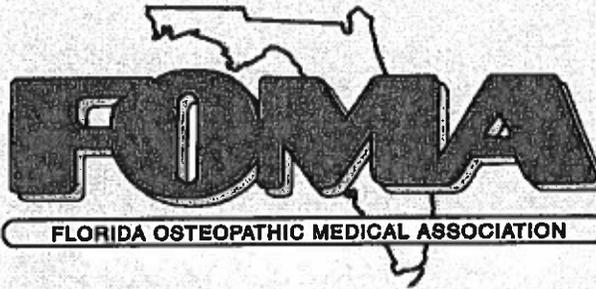
In my experience, I have found that CE Broker shows the utmost professionalism in its dealings with stakeholders. The company's leadership is quick to listen to the medical community and responds quickly and proactively to address concerns, critiques, and requests for additional services. The online products and customer services they provide have proven invaluable to the FMA and our members. Their CE tracking system is a beneficial resource for Florida-licensed physicians, both those who reside and practice within the state, as well as those who maintain a Florida license but practice outside the state. Overall, CE Broker and its staff consistently provide the high level of service you would expect from a prominent State vendor.

Our members have particularly enjoyed the Concierge service and the mobile apps. We have also appreciated CE Broker's commitment to send representatives to our educational conferences and events whenever requested. The FMA always receives prompt and courteous service from the CE Broker support center whose staff goes above and beyond expectations to ensure that we receive everything we need to maintain our status as a reporting educational provider in Florida. We really could not ask for anything more.

I look forward to seeing the products and services that CE Broker will develop in the years to come. Please feel free to contact me at 800.762.0233 if I can provide additional assistance or information.

Regards,

Melissa Carter  
Sr. VP of Education & Membership



**2014-OFFICERS-2015**

**PRESIDENT**

JORGE D. LUNA, DO, FACOFF  
4801 S. University Drive, Suite 110  
Davie, Florida 33328

**PRESIDENT-ELECT**

WILLIAM H. STAGER, DO, MPH, FACOFF  
311 Golf Road, Suite 1100  
West Palm Beach, Florida 33407

**FIRST VICE-PRESIDENT**

NICOLE H. BIXLER, DO, MBA, FACOFF  
120 Medical Boulevard, Suite 103  
Spring Hill, Florida 34609

**SECOND VICE-PRESIDENT**

JOSEPH S. DE GAETANO, DO, FACOFF  
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Fort Lauderdale, Florida 33328

**PAST PRESIDENT**

GREGORY J. JAMES, DO, MPH, FACOFF  
9009 Corporate Lake Drive  
Tampa, Florida 33634

**DIRECTORS AT LARGE**

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Clearwater, Florida 33761

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Fort Myers, Florida 33901

MARC G. KAPROW, DO, FACOI  
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Davie, Florida 33329

JOSHUA D. LENCHUS, DO, RPH, FACP  
1120 NW 14th Street  
1185 CRB (C218)  
Miami, Florida 33138

JAMES A. VOIRIN, DO, FAAFP  
7408 Red Bug Lake Road  
Oviedo, Florida 32765



**EXECUTIVE OFFICE**

THE HULL BUILDING  
2007 Apalachee Parkway  
Tallahassee, Florida 32301

Telephone: (850) 878-7384  
Fax: (850) 942-7538  
E-Mail: admin@foma.org  
Website: www.foma.org

**EXECUTIVE DIRECTOR**

STEPHEN R. WINN

**LEGAL COUNSEL**

JASON D. WINN, ESQUIRE

December 19, 2014

To all interested parties:

As the Executive Director for the Florida Osteopathic Medical Association, I am pleased to write this letter of recommendation for CE Broker.

Our association has worked closely with CE Broker since 2004, and I am always impressed by their professionalism and attentiveness to the concerns and interests of our members and of the medical community in Florida.

FOMA was the first professional association to partner with CE Broker to provide Professional accounts as a member benefit. Our members value this service and only have positive things to say about CE Broker and their staff. FOMA also reports continuing education for our members, and I have always been pleased by the accuracy and ease of use of the educational provider system.

I would recommend CE Broker to any State agency and applaud the Florida Department of Health for using such a beneficial system to help healthcare professionals stay on top of their CME requirements.

Sincerely,

Stephen R. Winn  
Executive Director



[Home](#)

[My Records](#) ▾

[Course Search](#) ▾

[Messages](#) ▾

[Account Info](#) ▾

[Report CE](#) +

# Welcome, Jane F. Doe

## Professional Account Dashboard

### Renewal Transcripts

CE Compliance Status

 Not Complete

[View My Transcript](#)

[Report CE Hours](#)

ME99999999  
Medical Doctor

02/01/2014 - 01/31/2016  
Florida



[License / Certification](#)



# My Records

## License Transcripts for JANE F. DOE

Print Friendly Version

You're on your way!

You may have multiple periods for each transcript name:

02/01/2014 - 01/31/2016

### License Transcript

**⚠ Not Complete**

**Transcript Name** ME99999999  
**Profession** Medical Doctor  
**Completion Date** 01/31/2016  
**Days Remaining** 48  
**Status** Active/Clear  
**Scenario** ME, Standard



#### Did you know?

Do I have to have Domestic Violence this cycle? Two (2) hours of Domestic Violence are required every third license cycle. To see whether you are in your required Domestic Violence license cycle, please scroll down to view your specific requirements. If not

**▼ Read more**

### Subject Area

Subject Area	Hours Required	Hours Posted	Hours Needed
<b>Medical Errors</b>	2	0	2
<b>General (AMA Category I)</b>	36	24	12
MEDICINE 01/26/2015		2	
MAYO LIVE EVENT 06/23/2015 Carried over from Domestic Violence (AMA Category I)		1	
FMA 08/03/2015		20	
MAYO CLINIC LIVE 08/09/2015		1	
<b>Domestic Violence</b>	2	2	0
MAYO LIVE EVENT 06/23/2015 Carried over to General (AMA Category I) for 1.00 hours		2	
<b>Total Hours:</b>	<b>40</b>	<b>28</b>	<b>14</b>

Please Allow 30 Days

#### Helpful Links



The FL Dept. of Health requests approved CE Providers to report program completion within 30 days.

[View FAQs](#)

[View Course History](#)

[Report Continuing Education](#)



[Home](#)

[My Records](#) ▾

[Course Search](#) ▾

[Messages](#) ▾

[Account Info](#) ▾

[Report CE +](#)

# Course Detail

**Tracking # 20-483920**

License Number **ME99999999**  
 Course Name **MEDICINE**  
 Provider **CEBROKER TEST PROVIDER**  
 Course Type **Anytime**  
 Delivery Method **Computer-Based Training (ie: online courses)**

Profession	Earned Hours
<b>Medical Doctor</b> General (AMA Category I)	2



## Frequently Asked Questions

Use the chapter links on the right to quickly find your topic.

# All Board of Medicine Professions

### Will CE Broker notify me when my continuing education deadline is approaching?

You can set your renewal and unmet notifications. The reminders will be sent at the interval you request.

The notifications will be sent to your CE Broker Message Box and up to two e-mail addresses. To view the email addresses, click Account Info on the navigation bar and select My Email and Reminder Notices from the dropdown.

### Will CE Broker notify me when my license expiration is approaching?

You can set your renewal and unmet notifications. The reminders will be sent at the interval you request.

The notifications will be sent to your CE Broker Message Box and up to two e-mail addresses. To view the email addresses, click Account Info on the navigation bar and select My Email and Reminder Notices from the dropdown.

### Am I required to complete a Domestic Violence course?

Florida Statute 456.031 requires licensees of certain Boards to complete a 2-hour continuing education course, approved by the board, on domestic violence as part of every third biennial relicensure or recertification.

### Can I select the biennium I wish to fulfill my Domestic Violence requirement?

Yes, each licensee selects his/her "third" biennium. There are no "common" bienniums for a profession.

### Am I required to complete more than the standard number of hours in the biennium I select to fulfill the Domestic Violence requirement?

No, the 2 hours for Domestic Violence do not increase your required number of continuing education hours.

### If I complete more than 2 hours of Domestic Violence in my selected biennium, will the excess Domestic Violence hours fulfill my other continuing education requirements?

Domestic Violence hours that are not AMA Category I are limited to the two required hours. Domestic Violence that is Category I fulfills General AMA Category I.

### I fulfilled my third biennium Domestic Violence requirement last biennium and I just took a one hour Domestic Violence course. Will the one hour course count toward my current renewal requirements?

Domestic Violence hours that are not AMA Category I are limited to the two required hours. Domestic Violence that is Category I can be used to fulfill General AMA Category I. If you complete one more Domestic Violence hour this biennium, the two Domestic Violence hours will reset your third biennium clock.

### May I take a Domestic Violence course from any educational provider?

## FAQ Chapters

- Will CE Broker notify me when my continuing education deadline is approaching?
- Will CE Broker notify me when my license expiration is approaching?
- Am I required to complete a Domestic Violence course?
- Can I select the biennium I wish to fulfill my Domestic Violence requirement?
- Am I required to complete more than the standard number of hours in the biennium I select to fulfill the Domestic Violence requirement?
- If I complete more than 2 hours of Domestic Violence in my selected biennium, will the excess Domestic Violence hours fulfill my other continuing education requirements?
- I fulfilled my third biennium Domestic Violence requirement last biennium and I just took a one hour Domestic Violence course. Will the one hour course count toward my current renewal requirements?
- May I take a Domestic Violence course from any educational provider?
- May I fulfill my Domestic Violence requirements with live and anytime courses?

The following are eligible to grant Domestic Violence course credit to Board of Medicine licensees:

- Approved CE Provider of American Medical Association (AMA)
- Approved CE Provider of the Florida Medical Association (FMA)
- CE Provider Approved by the Accreditation Council for Continuing Medical Education (ACCME)
- CE Provider with programs approved by the American Academy of Family Physicians prescribed credit - I agree to only provide American Academy of Family Physicians prescribed credit approved courses
- CE Provider with programs approved by the American Academy of Physician Assistants (AAPA) for Category I CME - I agree to only provide American Academy of Physician Assistants (AAPA), Category I CME approved courses.
- CE Provider with programs approved by the American College of Emergency Physicians, Category I - I agree to only provide American College of Emergency Physicians, Category I approved courses.
- CE Provider with programs approved by the American College of Obstetricians & Gynecologists cognates - I agree to only provide American College of Obstetricians and Gynecologists cognates-approved courses.
- CE Provider with study courses required by those specialty certification boards approved by the Board for the purpose of sitting for specialty recertification examinations.

Note: Domestic Violence courses approved by other MQA Boards are not accepted by the Board of Medicine.

- 
- May I fulfill my Domestic Violence requirements with live and anytime courses?

Yes, both live and anytime courses are acceptable.

---



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[Home](#)

[My Records ▾](#)

[Course Search ▾](#)

[Messages ▾](#)

[Account Info ▾](#)

[Report CE +](#)

# Welcome, Jane Doe

## Professional Account Dashboard

### Renewal Transcripts

CE Compliance Status

 Not Complete

[View My Transcript](#)

[Report CE Hours](#)

RN99999999

Registered Professional Nurse -  
Georgia

04/30/2014 - 04/30/2016

Georgia



[License / Certification](#)



# My Records

## License Transcripts for Jane Doe

[Print Friendly Version](#)

Making progress!

You may have multiple periods for each transcript name:

04/30/2014 - 04/30/2016

### License Transcript

Not Complete

**Transcript Name** RN99999999

**Profession** Registered Professional Nurse - Georgia

**Completion Date** 04/30/2016

**Days Remaining** 138

**Status** Active

**Scenario** RN, Standard



#### Did you know?

There are several types of exemptions that will fulfill your CE requirements. Please view your Reporting options to see if you qualify for one of the exemptions. If yes, proceed in posting it and your CE will be reflected as Complete.

### Subject Area

		Hours Required	Hours Posted	Hours Needed
General		38	10	28
Nursing Conference	09/01/2015		10	
<b>Total Hours:</b>		38	10	28

#### Helpful Links

[View Course History](#)

[Report Continuing Education](#)



Home

My Records ▾

Course Search ▾

Messages ▾

Account Info ▾

Report CE +

# Post CE Credit

## Option 1 - Georgia Nursing Continuing Education

**Licensee CE Posting**

Tracking #	99-3775892
Date Expected	
Date Completed	09/01/2015
Date Submitted	09/25/2015
Licensee Name	Jane Doe
License #	RN99999999
Profession	Registered Professional Nurse - Georgia
Status	Posted

---

Documentation	<b>Digital Attachments</b> <ul style="list-style-type: none"> <li>• SCREEN SHOT 2015-09-25 AT 2.14.07 PM</li> </ul>
Questions and Answers	<b>3 Questions</b> <ol style="list-style-type: none"> <li>1. What is the name of the CE activity that you completed? A:/ Nursing Conference</li> <li>2. What is the name of the CE provider that offered the activity? A:/ Georgia Nursing Association</li> <li>3. Please indicate how the CE activity was approved: A:/ Georgia Nurses Association</li> </ol>

Subject Area	Requested Hours
General	10



[Home](#)

[My Records](#) ▾

[Course Search](#) ▾

[Messages](#) ▾

[Account Info](#) ▾

[Report CE](#) +

# Report Continuing Education

Report CE/CME

Report Exemption

Select License Period:

04/30/2014 - 04/30/2016



**Option 2 - Maintenance of Certification or Recertification**

Begin

[Learn More](#) ↓

**Option 3 - Completion of accredited academic program of study**

Begin

[Learn More](#) ↓

**Option 4 - Verification of competency and 500 hours practice**

Begin

[Learn More](#) ↓

**Option 5 - Board approved re-entry prog. or graduation from a nursing ed. prog.**

Begin

[Learn More](#) ↓



[Return to Course Search](#)

# Course Search

## Providers Offering CE Packages for Registered Professional Nurse - Georgia

Sort By:

Display:

These educational providers have indicated they offer continuing education packages for your profession. If you would like more information, about a package they offer please click on the name of the provider for their contact information.

**Provider Name**

[NETCE - NETCE.COM](#)

[NURSECE4LESS.COM](#)

[CE SOLUTIONS-NURSE CONTINUING ED](#)

[APPROVED MEDICAL CEUS](#)

[PESI, INC.](#)

[N.E.E.T. NURSING EDUCATION AND EMERGENCY TRAINING](#)

[NANCY SAINTIL](#)

Audit Dashboard

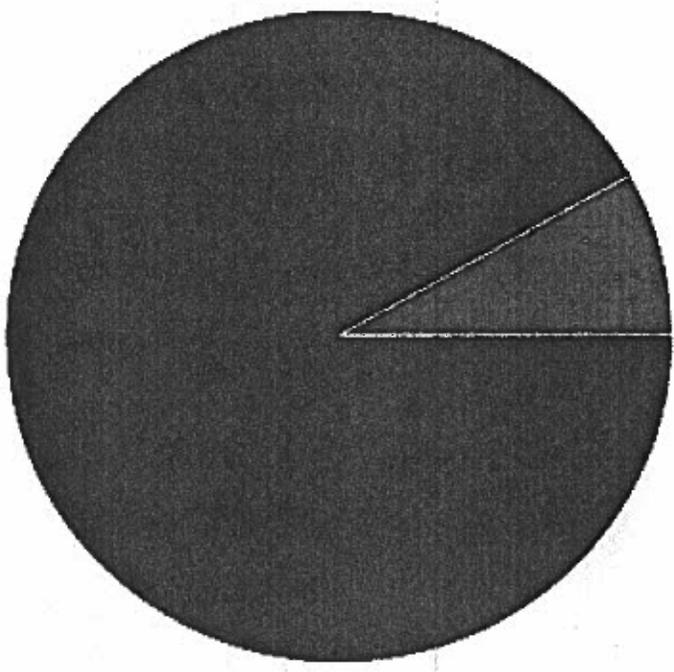
Board **Ohio Board of Speech-Language Pathology and Au** ▼

Profession **AY - Audiologist - Ohio** ▼

Timeframe **12/31/2014** ▼

**Search**

Transcript Status



■ Complete (91.84%)    ■ Incomplete (8.16%)

**Audit Summary**

49 total selected for audit

Activity Report: 81.63% Active

18.37% Inactive

Workflow Status: 0.00% Unreviewed

0.00% Under Review

100.00% Review Complete

Compliance Status: 8.16% Not Compliant

0.00% Under Investigation

91.84% Compliant

0.00% No Status

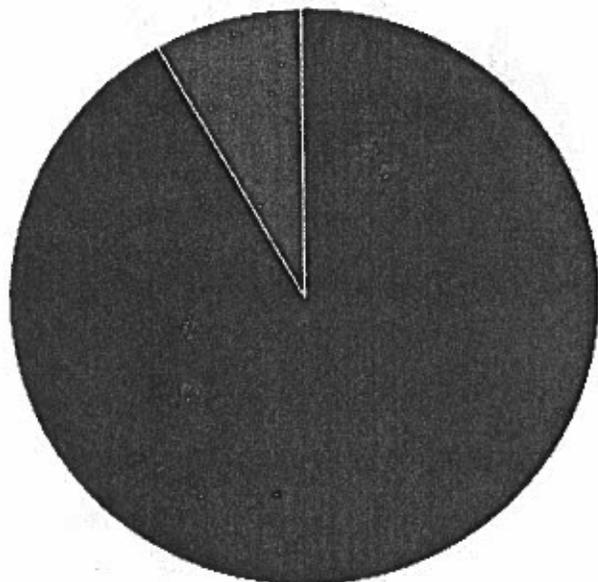
**Audit Dashboard**

Board:  ▼

Profession:  ▼

Timeframe:  ▼ **(Search)**

## Transcript Status



### Audit Summary

49 total selected for audit

**Activity Report:** 81.63% Active  
18.37% Inactive

**Workflow Status:** 0.00% Unreviewed  
 0.00% Under Review  
100.00% Review Complete

**Compliance Status:** 8.16% Not Compliant  
 0.00% Under Investigation  
91.84% Compliant  
 0.00% No Status

■ Complete (91.84%) ■ Incomplete (8.16%)

### Transcript Report [Complete]

Export Current View

License #	Last Name	First Name	Email	Activity Status	Transcript Status	Workflow Status	Compliance Status
<a href="#">A.00126</a>	BEREZIN	MARCIA		Active	100%	Review Complete	✘ ▲ ▼
<a href="#">A.00693</a>	BLANAR	CAROL	<a href="mailto:lot664@aol.com">lot664@aol.com</a>	Active	100%	Review Complete	✘ ▲ ▼
<a href="#">A.00559</a>	BOOHER	SHERYL	<a href="mailto:boohers57@gmail.com">boohers57@gmail.com</a>	Active	100%	Review Complete	✘ ▲ ▼
<a href="#">A.00531</a>	BOUBIN	FELICIA	<a href="mailto:fboubin@soents.com">fboubin@soents.com</a>	Active	100%	Review Complete	✘ ▲ ▼
<a href="#">A.00375</a>	BOYER	PAULINE	<a href="mailto:paulineboyer3@gmail.com">paulineboyer3@gmail.com</a>	Active	100%	Review Complete	✘ ▲ ▼
<a href="#">A.01753</a>	BRANHAM	AUDRA	<a href="mailto:audrabranham1@yahoo.com">audrabranham1@yahoo.com</a>	Active	100%	Review Complete	✘ ▲ ▼
<a href="#">A.00256</a>	BROSTIUS	MICHELE	<a href="mailto:michele.brosius@fcbdd.org">michele.brosius@fcbdd.org</a>	Active	100%	Review Complete	✘ ▲ ▼
<a href="#">A.00177</a>	BURLEY	ROBERT		Active	100%	Review Complete	✘ ▲ ▼

Profession

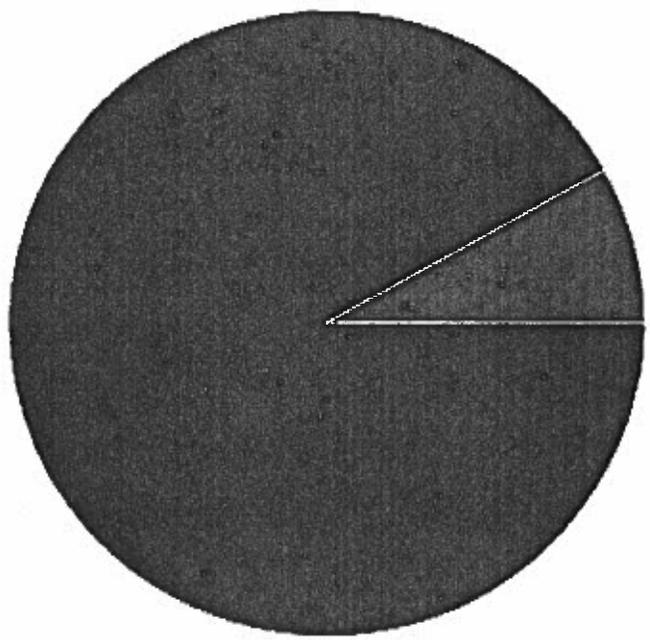
AV - Audiologist - Ohio

Timeframe

12/31/2014

(Search)

### Transcript Status



#### Audit Summary

49 total selected for audit

Activity Report: 81.53% Active  
18.37% Inactive

Workflow Status: 0.00% Unreviewed  
0.00% Under Review  
100.00% Review Complete

Compliance Status: 8.16% Not Compliant  
0.00% Under Investigation  
91.84% Compliant  
0.00% No Status

■ Complete (91.84%)    ■ Incomplete (8.16%)

Transcript Report [Incomplete]

Export Current View

License #	Last Name	First Name	Email	Activity Status	Transcript Status	Workflow Status	Compliance Status
<u>A.01746</u>	CHAMBERLAIN	CECELIA		Active	5%	Review Complete	X
<u>A.01811</u>	HOLDERMAN	KRISTA	<u>krista.holderman@gmail.com</u>	Active	55%	Review Complete	X
<u>A.00981</u>	SCHUNEMAN	JOHN	<u>jschuneman@bex.net</u>	Active	95%	Review Complete	X
<u>A.00382</u>	VARAVVAS	DENISE		Active	50%	Review Complete	

Tab 9 # 4

Dear \_\_\_\_\_:

The South Carolina Board of Examiners in Opticianry discussed the definition of "dispensing" at their most recent meeting. While the term is used throughout South Code Title 40, Chapter 38, it is not defined by that statute.

South Carolina Courts will often borrow relevant language from related statutes to help define professional terms that are used across medical disciplines. "Dispense" is such a term. The S.C. Pharmacy Practice Act §40-43-30(14) defines "dispensing" as "the transfer of possession of one or more doses of a drug or device by a licensed pharmacist or person permitted by law, to the ultimate consumer or his agent pursuant to a lawful order of a practitioner in a suitable container appropriate labeled for subsequent administration to, or use by, a patient. . . . The actual sales transaction and delivery of a drug or device is not considered dispensing . . ." This definition is conceptually useful in determining the appropriate application of S.C. Code 40-38-300 and the prohibition against dispensing contact lenses in the opticians' absence.

The Board concluded that in the opticianry context "dispensing" means the process of filling a contact lens prescription for transfer of possession of lenses to the patient. Dispensing is done by a licensed optician who verifies that the prescribed lenses have been selected and appropriately labeled for the patient. The actual sales transaction and delivery of the package is not considered dispensing.

Thank you for your interest in the professional practice of opticianry in South Carolina. If I may be of any further assistance, please contact me at \_\_\_\_\_.

Sincerely,

Angie Combs  
Administrator

I AM ASKING THAT THE POSITION STATEMENT FOR DEFINITION OF "DISPENSING" HAVE "FOR CONTACT LENSES ONLY" ADDED. IT WOULD CLARIFY THE USE OF THIS DEFINITION FOR WHAT WE WERE TOLD IT WAS CREATED.

Ronnie Harbert



SECTION 40-38-270

**South Carolina Board of Examiners in Opticianry**

**Position Statement**

**Definition of "Dispensing"** "FOR CONTACT LENSES ONLY"

Effective January 28, 2007

The Board of Examiners in Opticianry has been asked to clarify what it expects of licensees concerning compliance with S.C. Code 40-38-300, particularly the provision that "no contact lenses may be dispensed during the optician's absence." The term "dispense" is not defined in the Title 40, Chapter 38. Any statute must be interpreted to give effect to the intent of the legislature that enacted it. The exclusive purpose of the legislature in regulating professional practice of opticianry is to protect the public welfare through the requirements of specialized skill and training for work that is distinguishable from ordinary labor. S.C. Code §40-1-10(B).

The most common definitions of "dispense" in health care context refer to the preparation and giving out of medicines. The statutory definition of "dispense" in a related South Carolina statute defines "dispensing" as the transfer of possession of a one or more doses of a medical device to the consumer pursuant to a lawful order. S.C. Code §40-43-30(14). This definition, in the South Carolina Pharmacy practice act, goes on to specifically distinguish between the professional and nonprofessional duties associated with dispensing. Thus, by that definition the interpretation and assessment of the prescription and the determination that the medical device is appropriately labeled and ready for transfer is considered to be dispensing for which a license is required. The actual sales transaction and delivery of the device is not considered dispensing.

This concept is equally sound in the context of S.C. Code 40-38-300. A contact lens dispensing license is required to accept a prescription, interpret it, and assure that the prescribed devices are appropriately labeled and ready for transfer. The actual sales transaction is not dispensing. Thus no prescription may be accepted, interpreted or assessed of the prescription and no determination may be made that contact lenses are appropriately labeled and ready for transfer when the contact lens dispensing licensee is not present. The actual sales of contact lenses that have been selected and labeled under professional supervision can be completed in the contact lens dispensing licensee's absence.

No disciplinary action will be taken by the South Carolina Board of Examiners in Opticianry where a contact lens dispensing licensee complies with this interpretation. This is a statement of the Board of Examiners in Opticianry concerning its interpretation of the requirements for professional practice of opticianry in South Carolina and should not be construed to control billing issues, insurance issues or employment contracts.

**Angie Combs**

---

From: Sharon Dantzler  
Sent: Thursday, January 21, 2010 5:19 PM  
To: Angie Combs

Angie, I have attached for Mr. Gosnell's use the actual formal opinion on "coverage" written almost 10 years ago. While the optometry statute has been updated during that period, the conclusions are still valid. I have also attached a letter drafted to explain the Board's view of what it means to "dispense."

These opinions serve to inform the licensed community that no disciplinary action will be taken by the South Carolina Board of Examiners In Opticianry where a licensee conducts his professional practice in accordance with the Board's advice. This kind of information is often referred to as a "safe-harbor". These statements are not enforceable as law and licensees may structure their practice differently so long as they comply with the relevant statutes.

Statements of the Board of Examiners In Opticianry do not govern the conduct of any person who is not a licensee of the board. Therefore, statements of the Board of Examiners In Opticianry concerning its interpretation of the requirements for professional practice of opticianry in South Carolina should not be construed to control billing issues, insurance issues or employment contracts.

Sharon A. Dantzler  
SC Dept. of LLR  
dantzlers@lr.sc.gov  
lr.state.sc.us  
(803) 896-4475  
(803) 896-4471

PO Box 11329  
110 Centerville Drive (29210)  
Columbia, SC 29211-1329



## **ELECTRONIC CONTINUING EDUCATION MONITORING SYSTEM**

### **OBJECTIVES:**

- **Increase continuing education compliance**
- **Obtain 100% continuing education audit of South Carolina licensees that are required to complete continuing education**
- **Simplify continuing education auditing for Board administration**
- **Reduce the resources used to complete an audit and other continuing education related tasks.**
- **Simplify continuing education tracking and reporting for licensees**
- **Increase the resources available for licensees to help complete required continuing education**



---

# Automate & Simplify

—— Working with CE Broker ——



# Why CE Broker

**License renewal should be simple.** Licensed professionals are always driven to learn through both professional experience and continuing education. Stressing about requirements for renewal shouldn't be part of the job description. We believe that regulating agencies should be able to lift the burden of tracking compliance off of their licensees and place it on an electronic system that converts their data into a clear list of what they've done, what they need, and when it's required.

**Simplifying CE doesn't only benefit the licensees.** Since all CE is accounted for electronically with CE Broker, audits are transformed from cluttered, paperwork-ridden investigations into quick, accurate verifications. You and your staff can spend more time advancing the interests and education of your licensees.

## A History of Excellence

As a company that is driven by the goal of simplifying the license renewal process and impact of regulation, we have worked over 12 years to perfect solutions for licensed professionals, associations, boards, and educational providers on state and national levels.

By integrating the CE Broker tracking system with its license renewal system, the Florida Department of Health has seen over a 30% increase in CE compliance and a projected savings of \$515,000 annually.

*"Our experience with CE Broker has been exceptional. We have been a provider of continuing education since 1999. During that time we have worked with many state governments who have reporting systems, but none compare to CE Broker's system. It is easy for consumers. easy for providers to report and it has great customer service. That stability means that you get competent, accurate answers to your questions every time you call.*

*If you are a state administrator and you want to put some fairness and accountability into your state CE program, without increasing costs for your state, why not select a company with a great record."*

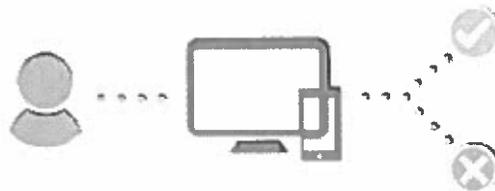
*- Todd Mowl, Elite CME Inc.*

# Audits Reinvented

Whether you audit your licensees at the time of renewal or as a post audit, you will now have the ability to audit 100% of your licensee population.

## Option 1 – 100% audit of CE at the time of renewal

- By using CE Broker's API, licensees can see their CE compliance status on your website. When licensees renew, your system can query our database in real-time to verify CE compliance.
- If the licensee is not in compliance in the tracking system, they must report any missing CE before they are allowed to proceed with renewal.
- Eliminates the need for any paper audit, as all information is stored in the CE Broker database and is accessible 24X7.



## Option 2 – 100% post audit

- Members demonstrate compliance prior to the audit by reporting CE to their records and attest to their completion.
- Audit staff can log in through a separate user interface to run compliance reports and review records of licensees under audit.
- Licensees who do not show compliance by the end of the biennium will be subject to a manual audit. Those that are manually audited will be granted access into the tracking system so that they can respond to the audit electronically. All supporting documentation will be gathered in CE Broker, eliminating the need for licensees to mail documentation to the auditor.
- When a licensee is deemed compliant, a "pass" letter can be automatically generated.



# Customized CE Reporting

Licensees report their hours through an easy-to-use customized interface. They submit basic info on the CE including hours, subject areas, delivery method (live, online, etc.) and how the CE was approved. Audits are quick and painless when all the information is already available!

2012 | 264,057

2015 | 945,988

Self-reporting CE is simple & trends show licensees prefer the ease of electronic reporting methods. This chart shows the growth of self-reporting through all CE Broker accounts.

# Licensee-focused Design

The licensee-focused design that the CE Broker user interface displays simplifies the process of tracking continuing education credits. With just a quick glance, licensees can see their compliance status in their dashboard, view successfully reported courses in Course History, self-report any necessary credits that they are lacking and search for approved courses right from within their account. Licensees can log in to their accounts with the **free** iPhone & Android apps to manage everything they need on the go! Plus, our full-access support center is available to answer and questions that your Board or licensees may have. We aim to make the renewal process as simple as possible for licensees.



# Educational Providers

There are many ways to approve educational providers and courses. All of this can be accommodated online through CE Broker.

**Your Board staff secure account will include:**

- Paperless communications between the staff and educational providers. Messages are automatically sent, as requested, to the educational provider as the staff reviewers and approvers process each application.
- Approval queues with color-coding and reminder messages.
- Review flow where applications requiring approval can be routed to others, such as committee members or approving groups.
- Link to request additional information from the respective educational provider.
- History of requests and responses.

## Free Course Search

Approved providers can advertise courses in the CE Broker course search. Licensees can find hundreds of courses guaranteed to apply towards renewal requirements.

## Reporting Options

Having approved providers report directly into CE Broker for your licensees ensures that all course credit completed is from a valid source.

A wide range of methods is available to providers to report course completions. Options include direct online entry, file uploads, and system-to-system interfaces.

*We recommend that the Board staff specifies an amount of time in which providers must report.*



# We'll Take the Questions

Our Support Center serves your Board as well as your licensees. Having a Support Center dedicated to assisting licensees will drastically reduce calls to your staff.

## Your Board

The CE Broker Support Center performs all of the system set up & modifications for you. You only need to use the system, not configure it! Our team is ready to help your staff understand how the system works.

## Your Licensees

Your licensees may contact the CE Broker Support Center via a toll-free phone number, email, or live chat. Our Support Center hours are 8:00 a.m. to 8:00 p.m. Monday through Friday Eastern time, except for Florida State holidays.

The CE Experts are skilled and thoroughly trained on the CE Broker system. They are dedicated to providing first class customer support and will be trained on your Board's rules and requirements.

*"CE Broker has great customer service. I have always been impressed with the speed of the replies and the level of knowledge each person possesses."*

*- Ivy Hultquist, RN*

## 2015 CE Broker Support Center Stats



**Calls**  
124,792



**Live Chat**  
58,179



**Emails**  
22,383

# Marketing Support

**Let us help you spread the good news!**

Our marketing and graphic design team would love to help you craft instructional materials and awareness campaigns to help make this implementation as effective as possible. We offer custom flyers, newsletters, emails, and supportive web graphics. Any kind of marketing support is provided at no charge.

# Pricing

**We can offer you our fully-featured compliance suite at no cost:**

- CE compliance tracking
- Paperless, streamlined audits
- Promotional marketing materials
- Phone, chat and email support for educational providers, Board staff and licensees

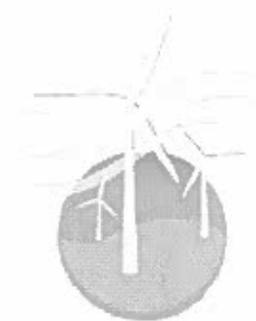
This model is funded by individual licensee subscriptions and is dependent upon clear communications from your Board. Our marketing department will work directly with you to help educate licensees on CE Broker and how they benefit from the various account options. We will not be aggressive in the marketing of our paid services and will instead focus on the benefits of our free account. As they learn more about CE Broker, we are confident licensees will voluntarily opt for the Professional or Concierge Account over time.

# Our Business Model

**These services are available at no cost to the State regulating entity, ever.** We gain revenue from licensee, business and Association-provided paid accounts (Professional, Concierge, and Business Models.) Currently, we have over **250 Business Accounts**. 13% of the licensee population voluntarily opt to use a Professional Account.

# Certified Green Energy

CE Broker is fueled by Green-e® certified renewable energy. The Green-e® program certifies that the Renewable Energy Certificates we purchase meet strict environmental and consumer protection standards established by the non-profit Center for Resources Solution.



# Thank You!

We are extremely grateful you have taken the time to read through this white paper, and are eager to speak with you about simplifying continuing education management at your organization. Please contact us for a demonstration of the system.

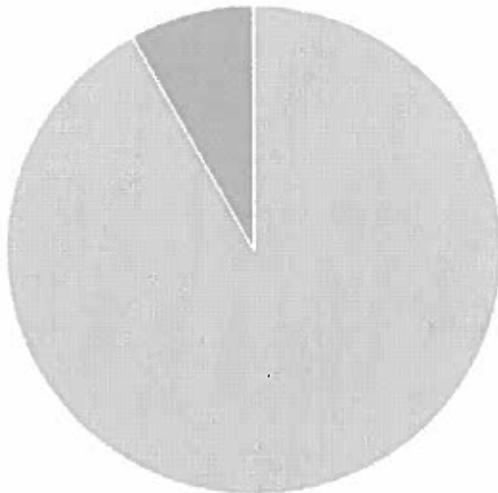
Home > Communication Center > Audit Dashboard

USER: CE PROVIDER VERIFICATION, Ohio Board of Speech-Language Pathology and Audiology

### Audit Dashboard

Board: Ohio Board of Speech-Language Pathology and Au ▼  
Profession: AY - Audiologist - Ohio ▼  
Timeframe: 12/31/2014 ▼ **Search**

### Transcript Status



■ Complete (91.84%) ■ Incomplete (8.16%)

### Audit Summary

49 total selected for audit

**Activity Report:** 61.63% Active  
16.37% Inactive

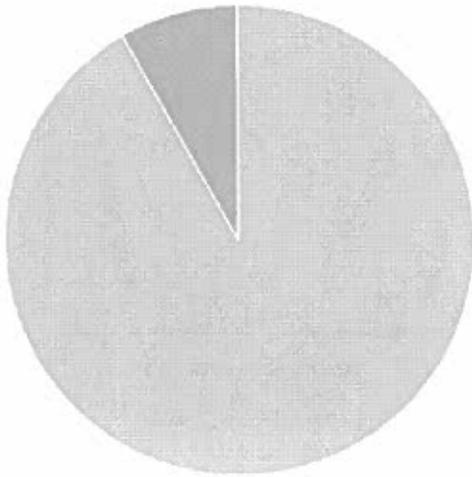
**Workflow Status:** 0.00% Unreviewed  
0.00% Under Review  
100.00% Review Complete

**Compliance Status:** 6.16% Not Compliant  
0.00% Under Investigation  
91.84% Compliant  
0.00% No Status

**Audit Dashboard**

Board:  ▾  
 Profession:  ▾  
 Timeframe:  ▾

**Transcript Status**



**Audit Summary**

48 total selected for audit

**Activity Report:** 91.63% Active  
 18.37% Inactive

**Workflow Status:** 0.00% Unreviewed  
 0.00% Under Review  
 100.00% Review Complete

**Compliance Status:** 8.16% Not Compliant  
 0.00% Under Investigation  
 91.84% Compliant  
 0.00% No Status

■ Complete (91.84%) ■ Incomplete (8.16%)

**Transcript Report [Complete]**

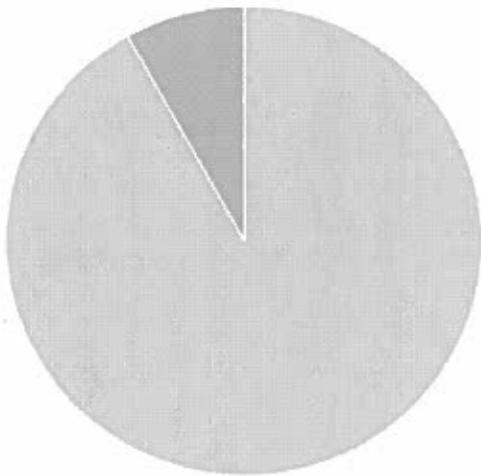
1 2

License #	Last Name	First Name	Email	Activity Status	Transcript Status	Workflow Status	Compliance Status
<a href="#">A.00126</a>	BEREZIN	MARCIA		Active	100%	Review Complete	✘ ▲ ✓
<a href="#">A.00693</a>	BLANAR	CAROL	[REDACTED]	Active	100%	Review Complete	✘ ▲ ✓
<a href="#">A.00559</a>	BOCHER	SHERYL	[REDACTED]	Active	100%	Review Complete	✘ ▲ ✓
<a href="#">A.00531</a>	BOUBIN	FELICIA	[REDACTED]	Active	100%	Review Complete	✘ ▲ ✓
<a href="#">A.00375</a>	BOYER	PAULINE	[REDACTED]	Active	100%	Review Complete	✘ ▲ ✓
<a href="#">A.01751</a>	BRANHAM	AUDRA	[REDACTED]	Active	100%	Review Complete	✘ ▲ ✓
<a href="#">A.00256</a>	BROSJUS	MICHELE	[REDACTED]	Active	100%	Review Complete	✘ ▲ ✓
<a href="#">A.00177</a>	BURLEY	ROBERT		Active	100%	Review Complete	✘ ▲ ✓

**Audit Dashboard**

Board:  ▼  
 Profession:  ▼  
 Timeframe:  ▼

**Transcript Status**



■ Complete (91.84%) ■ Incomplete (8.16%)

**Audit Summary**

49 total selected for audit

**Activity Report:** 81.63% Active  
18.37% Inactive

**Workflow Status:** 0.00% Unreviewed  
 0.00% Under Review  
100.00% Review Complete

**Compliance Status:** 8.16% Not Compliant  
 0.00% Under Investigation  
91.84% Compliant  
 0.00% No Status

**Transcript Report [Incomplete]**

License #	Last Name	First Name	Email	Activity Status	Transcript Status	Workflow Status	Compliance Status
<a href="#">A.01746</a>	CHAMBERLAIN	CECELIA		Active	5%	Review Complete	✘ ⚠ ✓
<a href="#">A.01811</a>	HOLDERMAN	KRISTA	[REDACTED]	Active	55%	Review Complete	✘ ⚠ ✓
<a href="#">A.00991</a>	SCHLNEMAN	JOHN	[REDACTED]	Active	95%	Review Complete	✘ ⚠ ✓
<a href="#">A.00362</a>	VARAVVAS	DENISE		Active	50%	Review Complete	✘ ⚠ ✓

# DASHBOARD

## Basic Account – RN - Florida



Renew Subscription

### Welcome, Jane G Poe

Basic Account

CE Compliance Status

Report Hours/Exemptions

Search for a Course

 Not Complete

Not complete? To figure out what's still missing, compare your course completions for the current license cycle to your [renewal requirements](#).

Let us calculate compliance for you. [Upgrade to the Professional Account today.](#)



### My Course History

The course History below is a chronological listing of courses that have been reported to CE Broker, it includes courses posted for all licenses that are linked on your profile. It does not indicate whether or not your requirements are fulfilled.

Course (Links to course detail)	Date Completed	Hours	Digital Storage	Rating
XCVXCV	01/03/2016	5	Only available with the Professional Account	☆☆☆☆☆
CARE OF THE PATIENT WITH OPEN ABDOMEN	12/19/2015	0	Only available with the Professional Account	☆☆☆☆☆

# Welcome, Jane G Poe

Basic Account

CE Compliance Status

 Not Complete

Report Hours/Exemptions

Search for a Course

Not complete? To figure out what's still missing, compare your course completions for the current license cycle to your [renewal requirements](#).

## Report Continuing Education



Report CE/CME one by one or all at once.

Select which of the options below is most appropriate for your reporting needs. To report multiple CE/CME activities, select *Quick Report*.

Quick Report

Report CE/CME

Report Exemption

CE/CME Reported by Board

Quick Report

### Medical Errors Course Approved by the Board

[Learn More](#) , [How to Report](#)

Begin

### Domestic Violence Course Approved by the Board

[Learn More](#) , [How to Report](#)

Begin

### Laws & Rules of the Board Course Approved by the Board

[Learn More](#) : [How to Report](#) .

Begin

### HIV/AIDS Course Approved by the Board

[Learn More](#) . [How to Report](#) .

Begin

### General CE approved by the Board

[Learn More](#) . [How to Report](#) .

Begin

### General CE course approved by a national nursing organization or another state Board of Nursing

[Learn More](#) . [How to Report](#) .

Begin

Report CE/CME

**Report Exemption**

CE/CME Reported by Board

Quick Report

Select License Period: 05/01/2018 - 04/30/2020



An exemption has already been reported for the selected cycle. [Click Here](#)

Report CE/CME

Report Exemption

**CE/CME Reported by Board**

Quick Report

### Volunteer Expert Witness

The Florida Board of Nursing will be posting your hours for this type of CE. Please mail your documentation directly to: FLORIDA BOARD OF NURSING 4052 BALD CYPRESS WAY BIN C-02 TALLAHASSEE, FL 32399-3252

[Learn More](#)

### Volunteer at a School

The Florida Board of Nursing will be posting your hours for Volunteer at School. You will not be self reporting these hours. Please mail your documentation directly to: FLORIDA BOARD OF NURSING 4052 BALD CYPRESS WAY BIN C-02 TALLAHASSEE, FL 32399-3252

[Learn More](#)

### Former Board Member Serving on a Probable Cause Panel

The Florida Board of Nursing will be posting your hours for this type of CE. Please mail your documentation directly to: FLORIDA BOARD OF NURSING 4052 BALD CYPRESS WAY BIN C-02 TALLAHASSEE, FL 32399-3252

[Learn More](#)

### Volunteer Health Care Provider Program

This will be reported by the Board of Nursing staff. Please mail supporting documentation to: FLORIDA BOARD OF NURSING 4052 BALD CYPRESS WAY BIN C-02 TALLAHASSEE, FL 32399-3252

[Learn More](#)

# DASHBOARD

## Professional Account – RN - Georgia

[Home](#)[My Records ▾](#)[Course Search ▾](#)[Messages ▾](#)[Account Info ▾](#)[Report CE +](#)

### Welcome, Jane Doe

Professional Account Dashboard

#### Renewal Transcripts

CE Compliance Status

 Complete

[View My Transcript](#)

[Report CE Hours](#)

RN999999999

Registered Professional Nurse -  
Georgia

04/30/2014 - 04/30/2016

Georgia



[License / Certification](#)

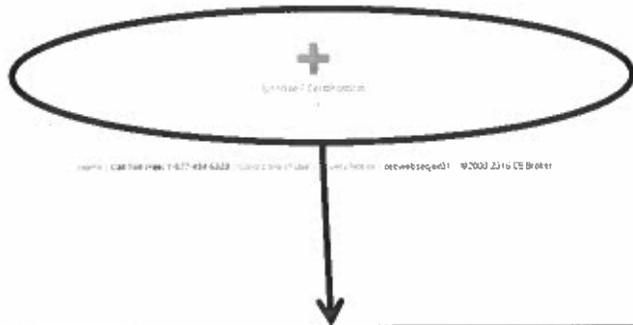
Welcome, Jane Doe  
Professional Account Dashboard

Renewal Transcripts

CE Compliance Status View My Transcript Report CE Hours

Complete

RN09090499	03/30/2014 - 04/30/2016
Registered Professional Nurse - Georgia	Georgia



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Welcome, Jane Doe  
Professional Account Dashboard

Renewal Transcripts

CE Compliance Report CE Hours

Complete

14 - 04/30/2016

**+** FL/DC/OH/WY/AL License  
Add another state license

**☁** Other States  
Add a License from another state  
Coming soon!

**♥** Heart Card  
Add a Heart Card

**Welcome, Jane Doe**  
Professional Account Dashboard

Renewal Transcripts

CE Compliance Status  Complete **View My Transcript** Report CE Hours

01/30/2014 - 04/30/2016  
Registered Professional Nurse - Georgia



**License Transcript**

Complete

**Name** Jane Doe  
**Transcript Name** RN999999999  
**Profession** Registered Professional Nurse - Georgia  
**Completion Date** 01/31/2014  
**Days Remaining** 0  
**Status** Active  
**Scenario** RN, First Renewal  
**Transcript Dates** 04/30/2012 - 01/31/2014  
**Printed Date** 06-JAN-2016



**Subject Area**

**General**

Test 01/01/2014

Hours Required	Hours Posted	Hours Needed
30	30	0
	30	
<b>Total Hours:</b>	<b>30</b>	<b>0</b>

Welcome, Jane Doe  
Professional Account Dashboard

Renewal Transcripts

1 | Compliance Status

View My Transcript

Report CE Hours

04/30/2012 - 01/31/2014

Registered Professional Nurse Georgia

04/30/2012 - 01/31/2014

Georgia

+

Go to My Profile



Report CE +

# Report Continuing Education

Report CE/CME

Report Exemption

Option 1 - Georgia Nursing Continuing Education

[Learn More](#) | [How to Report](#)

Begin

Report multiple courses from a single provider transcript

[Learn More](#) | [How to Report](#)

Begin



Report CE +

# Report Continuing Education

Report CE/CME

Report Exemption

Select License Period: 04/30/2012 - 01/31/2014

Option 2 - Maintenance of Certification or Recertification

[Learn More](#)

Begin

Option 3 - Completion of accredited academic program of study

[Learn More](#)

Begin

Option 4 - Verification of competency and 500 hours practice

[Learn More](#)

Begin

Option 5 - Board approved re-entry prog. or graduation from a nursing ed. prog.

[Learn More](#)

Begin

# DASHBOARD

## Professional Account – MD - Florida



[Home](#)

[My Records](#) ▾

[Course Search](#) ▾

[Messages](#) ▾

[Account Info](#) ▾

[Report CE](#) +

### Welcome, Jane G Poe

Professional Account Dashboard

#### Renewal Transcripts

CE Compliance Status

✔ Complete

[View My Transcript](#)

[Report CE Hours](#)

ME99999999  
Medical Doctor

02/01/2014 - 01/31/2016  
Florida



[License / Certification](#)

# License Transcript

Complete

Name **JANE G POE**  
 Transcript Name **ME99999999**  
 Profession **Medical Doctor**  
 Completion Date **01/31/2016**  
 Days Remaining **25**  
 Status **Active/Clear**  
 Scenario **ME, Standard**  
 Transcript Dates **02/01/2014 - 01/31/2016**  
 Printed Date **06-JAN-2016**



## Subject Area

	Hours Required	Hours Posted	Hours Needed
<b>Medical Errors</b>	<b>2</b>	<b>9</b>	<b>0</b>
EXAMPLE COURSE 12/31/2014		2	
Code 01/01/2016 Excess Hours not applied: 4		4	
Code 01/01/2016 Excess Hours not applied: 3		3	
<b>General (AMA Category I)</b>	<b>36</b>	<b>48.25</b>	<b>0</b>
MEDICINE 01/26/2015		2	
2015 FAAP FAMILY MEDICINE SPRING FORUM - GENERAL SESSION Excess Hours not applied: 4.25 04/26/2015		20.75	
MAYO CLINIC LIVE 08/09/2015 Excess Hours not applied: 1		1	
Code 01/01/2016 Excess Hours not applied: 4		4	
Code 01/01/2016 Excess Hours not applied: 3		3	
Code 01/01/2016		4	
Code 01/01/2016		3	
Code 01/01/2016		3	
Code 01/01/2016		3.5	
Code 01/01/2016		4	
<b>Domestic Violence</b>	<b>2</b>	<b>10</b>	<b>0</b>
Code 01/01/2016 Excess Hours not applied: 4		4	
Code 01/01/2016 Excess Hours not applied: 3		3	
MAYO LIVE EVENT 06/23/2015 Excess Hours not applied: 1		3	
<b>Total Hours:</b>	<b>40</b>	<b>67.25</b>	<b>0</b>

## Course Detail

### Tracking # 20-509220

License Number	ME99999999
Course Name	MAYO LIVE EVENT
Provider	CEBROKER TEST PROVIDER
Course Type	Live
Delivery Method	Class (opportunity for interaction with presenter/host)

Profession	Earned Hours
Medical Doctor	
Domestic Violence (AMA Category I)	3

# Course Search

Medical Doctor

1 Course Type

2 Search Criteria

3 Review Results

Review Results

Criteria

Below are the courses that fit your desired criteria. CE Broker does not offer these courses but is the impartial Course Search for approved educational providers. You can sort the courses or change your search criteria by clicking "Refine Search."

Sort By:

Display:

Response time: 1.2 seconds

Page 1

Course Name / Educational Provider	Delivery Method	Total Hours	Price	Save
PL VOICES - CLINICAL RECOMMENDATIONS MAY ... PRESCRIBER'S LETTER/THERAPEUTIC RESEARCH CENTER	Home Study	1	Contact Provider	<input type="radio"/>
MINDFULNESS AND PSYCHOTHERAPY WITH RON ... THE NATIONAL INSTITUTE FOR THE CLINICAL	Computer-Ba... (ie: online cou...	24	Contact Provider	<input type="radio"/>
INFECTION CONTROL FOR PHYSICIANS UNIVERSITY OF ARIZONA	Computer-Ba... (ie: online cou...	2	Contact Provider	<input type="radio"/>
GERIATRIC ABDOMINAL EMERGENCIES THE SULLIVAN GROUP	Computer-Ba... (ie: online cou...	2	Contact Provider	<input type="radio"/>
CHRONIC FATIGUE SYNDROME ONCOURSE LEARNING	Computer-Ba... (ie: online cou...	1	\$15.00	<input type="radio"/>
EMTALA: BASICS THE SULLIVAN GROUP	Computer-Ba... (ie: online cou...	2	Contact Provider	<input type="radio"/>
9862: FOODBORNE ILLNESS NETCE - NETCE.COM	Home Study	10	\$29.00	<input type="radio"/>
MEDICAL ERRORS AND RISK MANAGEMENT: IMP... PRIME EDUCATION, INC. (PRIME)	Home Study	2	\$29.00	<input type="radio"/>
PL VOICES : PRESCRIBING INSIGHTS ROUNDTABL... PRESCRIBER'S LETTER/THERAPEUTIC RESEARCH CENTER	Home Study	1	Contact Provider	<input type="radio"/>
ELECTRONIC FETAL HEART RATE MONITORING: ... THE SULLIVAN GROUP	Computer-Ba... (ie: online cou...	3	Contact Provider	<input type="radio"/>

# Frequently Asked Questions

ARTICLES



## Multiple Florida licenses

If you have multiple Florida licenses, you do not need to create an additional CE Broker account. You can tra...

MAR 04, 2015 02:20PM EST



## Do providers report for me?

Florida Statute 456.025(7) requires educational providers approved by the Florida Department of Health to elec...

SEP 09, 2015 11:47AM EDT



## How do I edit/delete CE postings?

There are two types of postings - things providers report for you, and things you report yourself ...

JUN 23, 2015 02:00PM EDT



## Can I use CE Broker for any other state besides Florida?

Currently, CE Broker tracks continuing education for the Florida Department of Health, the DC Board of Nursing,

OCT 09, 2015 03:37PM EDT



## Certificates of completion

The educational provider that offered the course is responsible for issuing you a certificate of completion. Y...

APR 17, 2015 01:08PM EDT



## Does CE Broker offer courses?

No. CE Broker is a tracking system, we do not offer the courses. If you would like to take courses, click ...

MAR 03, 2015 06:49PM EST

## Have a question about your CE requirements?

We are here to help. Contact us Monday-Friday 8AM-8PM EST



Email us at

[support@cebroke.com](mailto:support@cebroke.com)



Call us at

1-877-434-6323



LiveChat with an expert

[Live chat now](#)

Follow Us





# FMA

FLORIDA MEDICAL ASSOCIATION

P.O. Box 10298 | Tallahassee, FL | 32302

1480 Piedmont Drive E. | Tallahassee, FL | 32308

November 26, 2014

To All Interested Parties

I am pleased to write this letter of recommendation for CE Broker.

During my 17 year tenure with the Florida Medical Association, I have held several different positions including Manager of Accreditation Services, Director of Education, Vice President of Education and most recently, Senior Vice President of Education & Membership. In working with the education and membership functions of the FMA, one important responsibility has been to cultivate and foster relationships with vendors and organizations that offer services and products of benefit to our members - physicians licensed in the state of Florida. It has been my pleasure to have helped forge and now manage our vendor partnership with CE Broker for the past several years.

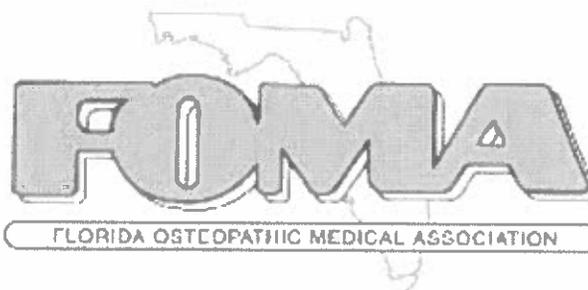
In my experience, I have found that CE Broker shows the utmost professionalism in its dealings with stakeholders. The company's leadership is quick to listen to the medical community and responds quickly and proactively to address concerns, critiques, and requests for additional services. The online products and customer services they provide have proven invaluable to the FMA and our members. Their CE tracking system is a beneficial resource for Florida-licensed physicians, both those who reside and practice within the state, as well as those who maintain a Florida license but practice outside the state. Overall, CE Broker and its staff consistently provide the high level of service you would expect from a prominent State vendor.

Our members have particularly enjoyed the Concierge service and the mobile apps. We have also appreciated CE Broker's commitment to send representatives to our educational conferences and events whenever requested. The FMA always receives prompt and courteous service from the CE Broker support center whose staff goes above and beyond expectations to ensure that we receive everything we need to maintain our status as a reporting educational provider in Florida. We really could not ask for anything more.

I look forward to seeing the products and services that CE Broker will develop in the years to come. Please feel free to contact me at 800.762.0233 if I can provide additional assistance or information.

Regards,

Melissa Carter  
Sr. VP of Education & Membership



2014 OFFICERS 2014

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Dade, Florida 33128

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**EXECUTIVE DIRECTOR**

STEPHEN R. WINN

**LEGAL COUNSEL**

WYONNE WYNN TROUBILLI

December 19, 2014

To all interested parties:

As the Executive Director for the Florida Osteopathic Medical Association, I am pleased to write this letter of recommendation for CE Broker.

Our association has worked closely with CE Broker since 2004, and I am always impressed by their professionalism and attentiveness to the concerns and interests of our members and of the medical community in Florida.

FOMA was the first professional association to partner with CE Broker to provide Professional accounts as a member benefit. Our members value this service and only have positive things to say about CE Broker and their staff. FOMA also reports continuing education for our members, and I have always been pleased by the accuracy and ease of use of the educational provider system.

I would recommend CE Broker to any State agency and applaud the Florida Department of Health for using such a beneficial system to help healthcare professionals stay on top of their CME requirements.

Sincerely,

Stephen R. Winn  
Executive Director

Tab 9 # 7

# Occupational licenses cost jobs in S.C.

BY MARK V. HOLDEN

**W**hat should South Carolina lawmakers' New Year's resolutions be?

I have a suggestion: Break down barriers to opportunity for the least fortunate.

Elected officials in Charleston City Hall and the state government in Columbia should start by rolling back burdensome occupational licensing regulations, which stand in the way of low-income job-seekers and budding entrepreneurs.



Holden

Most people have never heard of occupational licenses, yet they are a growing hindrance to economic mobility both in South Carolina and across the country.

Before you can work in many professions, you are forced to seek permission from your state or local government in the form of an occupational license. To make matters more difficult, you often have to pay a significant sum of money or spend months — and sometimes years — in training before beginning your career.

That wasn't a huge deal when occupational licenses only applied to lawyers, doctors, and airline pilots. But other businesses quickly found they could handicap competitors and innovative start-ups if they licensed their own industries.

In July, the White House released a report detailing how occupational licensing laws have proliferated: "More than one-quarter of U.S. workers now require a license to do their jobs." At the state level, "the share of workers licensed ... has risen five-fold since the 1950s."

One recent academic estimate even puts the number of licensed jobs at nearly one in three.

Today, after years of lobbying campaigns by special interests, occupational licenses apply to hundreds of different entry-level and mid-level professions.

South Carolina is no exception. It's actually the 13th most heavily

Carolina license costs \$166 and requires 402 days in education or training. Many basic jobs require more training than an emergency medical technician.

And those are just some of the state occupational licenses. There are even more passed by cities like Charleston, which only restrict further an individual's attempt to earn a living.

These laws vary — and conflict — from city to city and state to state, making it that much harder for South Carolinians to find work and make a living.

We're starting to learn just how much harm occupational licenses have caused.

The White House again put it best, saying that licensing can "raise the price of goods and services" and "restrict employment opportunities" for those who need them most.

In fact, a 2011 academic study found that occupational licenses have prevented the creation of nearly 3 million jobs. They also cost consumers a whopping \$203 billion in higher costs every year.

Occupational licenses also turn away potential entrepreneurs, especially in low-income communities. A 2015 study by an Arizona State University researcher found that heavier licensing correlates with an 11 percent lower entrepreneurship rate for people at the bottom of the income scale.

These licenses also harm those who have run afoul of the criminal justice system. Once non-violent ex-offenders pay their debt to society, they should be encouraged to rejoin it by finding a job or starting a business.

Sadly, their own government bars them from pursuing a career that requires a license.

Knocking down these barriers is both morally praiseworthy and economically beneficial. Lawmakers in Charleston and the state government in Columbia should — at the very least — prevent the creation of new occupational licenses.

Better yet, they should roll back those that already exist.

If lawmakers do this, they'll help countless low- and middle-income South Carolinians improve their lives and climb the ladder of opportunity.

Surely that's a New Year's resolution worth making — and keeping.

**Mark V. Holden** is general counsel and senior vice president at Koch Industries.

This article appeared in the Charleston's Post and Courier Paper (1/04/16 pg 11 A). There seems to be a push nationally questioning the need for licensure and hardships created by them. I know that the St. Optimian have survived "Sunset Review" twice and needed to know if this would be something that needs to be addressed with our state board. My concerns would be that our field needs to be regulated to give the consumer the best care possible w/ their eye care needs. Thanks for allowing me the opportunity to share this.

Ron Harbert

Dear Colleague:

DRAFT 01/08/2016

We are writing to invite your state optician association to review a proposal to standardize a way for qualified and experienced opticians to become licensed by "credentials." The approach would impact both opticians who are licensed by another state or who are certified and have been in practice for a reasonable period in an unlicensed state. Participants in the Optician Collaboration Forums developed a draft Model Optician Mobility Act over the last 18 months.

The forum included representatives from:

- the American Board of Opticianry & the National Contact Lens Examiners (ABO-NCLE),
- the Commission on Opticianry Accreditation (COA),
- the Contact Lens Society of America (CLSA),
- the National Academy of Opticianry (NAO),
- the National Association of Optometrists and Opticians (NAOO),
- the National Commission of State Opticianry Regulatory Boards (NCSORB), the National Federation of Optical Schools (NFOS),
- the Opticians Association of America (OAA), and
- the Society to Advance Opticianry (SAO).

We would like to ask your state's optician association to review the attached draft of the Model Act. Please advise us and the other key stakeholders whether you believe this offers a way to update your state licensing requirements to establish a clear and reasonable path to optician licensure by credentials.

Based on our experiences in the Optician Collaboration Forums, we believe there will be broad support for this approach across a significant group of leaders in our profession, including association executives and officers, regulators, educators and employers. We believe adoption of this language (either by rule or, as appropriate, by legislation limited to this topic) would improve the ability of competent, experienced and credentialed opticians to become licensed in your state. In turn, we think this could advance the recognition and standing of opticians in the vision community nationally.

Assuming you agree that expanding licensure by credentials is a good idea, we'd like your comments on the proposed language. We think a Model Act leaves room for the states to customize the Model Act to fit their unique licensing laws, while at the same time reducing or eliminating differences that do not advance public welfare and that unnecessarily restrict the mobility of experienced and credentialed opticians.

We also would like to discuss with you whether you believe a change to accomplish these goals in your state would best be made through a Board rule, or if you believe that such a change should be made through legislation. The proposed language would define

2

**“Licensure by Credentials”**; we believe this approach could be incorporated by statute, and in some cases may be possible through regulation, when the Board has broad rulemaking power.

The draft Model Act also addresses **apprenticeship programs**: it proposes to allow credit for verified work experience out-of-state and would allow opticians-in-training to avoid duplication of the experience requirements of an apprenticeship program. The Forum participants believed this is an appropriate way to standardize and promote the development of opticians, thereby enhancing the profession.

Assuming you agree with this approach, the OAA, NAOO and other associations would like to work with you towards the adoption of such a Model Act in your state. We propose to involve key employers of opticians in your state and other stakeholders, particularly those who have supported the effort during the Collaboration Forums. Ultimately, we hope this would be an uncontested approach, with supporters endorsing the effort publicly. We would work with you to coordinate witnesses, letters of support and other activities as appropriate in favor of the proposed bill or rule.

### **Background**

We believe it is important for all the associations and industry groups to collaborate on matters of importance to the profession. One way to do that is to work together to reduce the existing barriers for qualified opticians who wish to practice in multiple Licensed States or who want to relocate to a Licensed State. The patchwork of regulations from state to state relating to optician licensing creates burdens for patients to gain access to quality eye care, and makes it difficult for opticians to practice across state lines or to move from state to state. In turn, this hurts the image of the profession by limiting the recognition of qualified opticians.

The variances are often unnecessary. When there are differences in laws that lead to barriers to mobility, and these differences do little or nothing to enhance public welfare or consumer health and safety, it is appropriate to reduce or eliminate them. This is particularly true given that the participants in the Collaboration Forum noted that the practice of opticianry does not significantly change from state to state.

Most Licensed States define the practice of opticianry to include the following, based on written prescriptions from duly licensed optometrists or physicians:

- Measuring, fitting, adapting, and adjusting spectacle lenses, spectacles, eyeglasses, contact lenses, and other prescription ophthalmic devices (collectively referenced as “ophthalmic devices”) for the aid or correction of visual or ocular anomalies of the human eye [states have some variations with respect to fitting contact lenses];
- Interpreting, preparing, and delivering work orders to laboratory technicians engaged in grinding lenses and fabrication of ophthalmic devices;

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- Verifying the quality of finished ophthalmic devices;
- Preparing and dispensing to the intended wearer finished ophthalmic devices; and
- Duplicating, replacing, or reproducing ophthalmic devices (except for contact lenses) without a prescription when there is no change in refractive value.

Some Licensed States require all individuals seeking licensure, including Licensed Opticians from other states, to complete either an educational course of study (e.g., two-year degree or certificate program) or an apprenticeship (ranging from two to five years) under the supervision of a Licensed Optician. When these requirements are applied to experienced certified opticians who have been working in another state, this can limit or delay the ability of those qualified professionals to serve the eye care needs of the patients in the new state.

The proposed approach would reduce barriers to mobility that arise when an individual seeking to begin optical dispensing in a new state possesses either (a) qualifications validated by another Licensed State or (b) optical dispensing experience in a state that doesn't license opticians, plus credentials that validate opticianry competencies, such as nationally recognized certifications.

The value of licensing or certification to the professional is diminished when the credentials and experience developed and confirmed in one state are not portable to another, thereby reducing the supply of competent opticians available to service patients and inhibiting the ability of these opticians to practice their profession.

#### **Proposal: Optician Model Act for Expedited Licensure**

At least two states—Nevada and Washington—have legislation to allow experienced and qualified opticians to become licensed without requiring additional time as an apprentice. Massachusetts has developed Rule language to allow a certified optician with adequate proof of experience in another state to become licensed. The language in these examples served as inspiration for the proposal. The Forum participants recommended that the Model Act should allow flexibility for a Licensed State to adjust the certification, experience and other licensure requirements to align licensure by credentials with its current licensure program.

For example, the participants in the Forum recommended that certification of a candidate for Licensure by Credentials by the National Contact Lens Examiners (“NCLE”) should be optional. States that currently require NCLE certification as part of a licensure program would retain this; states that currently do not require NCLE certification would eliminate this from the Model Act.

The Forum participants also recommended that Licensed States adopting a regulatory change to allow Licensure by Credentials have the discretion to align the length of work experience to the years of apprenticeship required in the Licensed State.

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If you believe your State Board has the authority to implement such licensure by rule or regulation, we encourage your association work with us, key stakeholders and the Board to make these proposed changes in the form of a rule, rather than seeking legislation.

Additionally, the Forum participants endorsed the idea that experience in one state should be transferable to another to expedite the apprenticeship period. Under the Model Act, an optician in training who has adequate proof of work experience in one state would be able to apply that to an apprenticeship in another state, rather than having to start the apprenticeship from the beginning. This would be the case whether the experience is gained in another state's regulated apprenticeship program, or is from work in an unlicensed state.

Forum participants felt strongly that any legislative effort should not be an open review of all the optician laws and regulations in a state. They agreed that the objective was to have an uncontested and non-controversial reform effort. Once the interested parties agree on the legislative or regulatory approach and finalized the language, there should be no amendments.

We have attached a draft Model Act that has been endorsed by the Forum participants. Please let us have your comments about the language and thoughts about whether and how this approach should become law in your state. We look forward in discussing this approach with you and others in your association's leadership. Thanks for the work you do to advance opticianry.

## **MODEL OPTICIAN MOBILITY ACT OF 2016**

*To be customized as appropriate to amend/fit into existing laws or regulations in states that currently license opticians.*

### **Licensure by Credentials as Dispensing Optician; Expedited Apprenticeship.**

1. **The Board shall issue a license as a dispensing optician to an applicant who:**
  - (a) **Is at least eighteen (18) years of age;**
  - (b) **Is of good moral character;**
  - (c) **Is a citizen of the United States or is lawfully entitled to remain and work in the United States;**
  - (d) **Is a graduate of an accredited high school or its equivalent;**
  - (e) **Has passed a nationally recognized optician certification examination such as the National Opticianry Competency Examination of the American Board of Opticianry and has maintained a current optician certification such as that issued by the American Board of Opticianry;**
  - (f) ***Has passed a nationally recognized contact lens specialty certification for opticians such as the Contact Lens Registry Examination of the National Contact Lens Examiners and has maintained a current contact lens specialty certification such as that issued by the National Contact Lens Examiners; [OPTIONAL LANGUAGE depending on the state's current requirement or lack thereof of a contact lens certification];***
  - (g) ***Has passed an examination on state laws related to opticianry adopted and administered by the Board [OPTIONAL LANGUAGE TO BE USED WHEN SUCH A STATE LAW EXAMINATION EXISTS AND IS REQUIRED FOR OTHER CANDIDATES FOR LICENSURE];*** and
  - (h) **Has either:**
    - (1) **An active license as a dispensing optician issued by the District of Columbia or any state or territory of the United States; or**
    - (2) **Not less than [INSERT NUMBER OF HOURS/YEARS FOR APPRENTICESHIP PROGRAM] of experience as a dispensing optician.**
2. **Expedited Apprenticeship: The Board shall establish a process to provide a candidate for licensure with credit towards a requirement of experience (e.g., an apprenticeship), such credit to be equivalent to the work experience of the candidate as an optician outside the state.**

- 2
3. **An applicant for a license based on credentials under Section 1(h)(1) shall submit proof of his/her active license issued by the District of Columbia or a state or territory of the United States.**
  4. **An applicant for a license based on credentials or for an expedited apprenticeship under Section 1(h)(2) shall submit sufficient written proof, as determined by rule of the board, of the completion of the experience of the applicant.**
    - a. **The Board shall establish standards for determining and verifying experience; such standards should be reasonable.**
    - b. **The Board shall seek to make such standards substantially equivalent to the standards used by other states.**
    - c. **The Board shall accept reasonable proof of experience, including attestation of experience by the applicant, with verification by one or more persons who is familiar with the applicant's experience. This may include an employer, supervisor or licensed optometrist or physician who can confirm any portion of the applicant's experience. The experience need not all be at the same location or with the same employer, supervisor or business establishment.**

**The intent of this section is to encourage and ease the ability of experienced opticians who are licensed, credentialed or certified to obtain a license to practice in the state, and for opticians in training to receive fair and reasonable recognition of their prior experience when enrolling in an apprenticeship program in this state.**

5. **A person practicing ophthalmic dispensing pursuant to a license as provided in this section is subject to the provisions of this chapter in the same manner as a person practicing ophthalmic dispensing pursuant to a license issued pursuant to [INSERT SECTION DETAILING IN-STATE LICENSURE PROCESS], including, without limitation, the provisions of this chapter governing the renewal, inactivity, or reactivation of a license.**

**H.4728 - EYE CARE CONSUMER PROTECTION LAW**

The following bill was introduced in the House on January 26, 2016 and read the first time. It was referred to the House Committee on Medical, Military, Public and Municipal Affairs (3M.)

**H. 4728 (Word version) -- Reps. Long, Erickson, Douglas, Ridgeway and Hixon: A BILL TO AMEND THE CODE OF LAWS OF SOUTH CAROLINA, 1976, BY ADDING CHAPTER 45 TO TITLE 44 TO ENACT THE "EYE CARE CONSUMER PROTECTION LAW" SO AS TO ESTABLISH REQUIREMENTS FOR A PERSON WHO SELLS SPECTACLES OR CONTACT LENSES USING REFRACTIVE DATA OR INFORMATION GENERATED BY AN AUTOMATED TESTING DEVICE.**

Referred to Committee on Medical, Military, Public and Municipal Affairs

Also See - S.1016

**South Carolina General Assembly**  
121st Session, 2015-2016

Download [This Bill](#) in Microsoft Word format

~~Indicates Matter Stricken~~

Indicates New Matter

**S. 1016**

**STATUS INFORMATION**

General Bill

Sponsors: Senators Cleary, Jackson, J. Matthews, Campbell, Davis, Scott, Turner and Rankin

Document Path: I:\council\bill\bh\26392vr16.docx

Introduced in the Senate on January 21, 2016

Currently residing in the Senate Committee on **Medical Affairs**

Summary: Eye Care Consumer Protection Law

**HISTORY OF LEGISLATIVE ACTIONS**

Date	Body	Action Description with journal page number
1/21/2016	Senate	Introduced and read first time ( <u>Senate Journal-page 6</u> )
1/21/2016	Senate	Referred to Committee on <b>Medical Affairs</b> ( <u>Senate Journal-page 6</u> )

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**VERSIONS OF THIS BILL**

1/21/2016

(Text matches printed bills. Document has been reformatted to meet World Wide Web specifications.)

**A BILL**

TO AMEND THE CODE OF LAWS OF SOUTH CAROLINA, 1976, BY ADDING CHAPTER 45 TO TITLE 44 TO ENACT THE "EYE CARE CONSUMER PROTECTION LAW" SO AS TO ESTABLISH REQUIREMENTS FOR A PERSON WHO SELLS SPECTACLES OR CONTACT LENSES USING REFRACTIVE DATA OR INFORMATION GENERATED BY AN AUTOMATED TESTING DEVICE.

Be it enacted by the General Assembly of the State of South Carolina:

SECTION 1. This chapter may be cited as the "Eye Care Consumer Protection Law".

SECTION 2. Title 44 of the 1976 Code is amended by adding:

"CHAPTER 45

## Eye Care Consumer Protection

Section 44-45-10. For purposes of this chapter, unless the context indicates otherwise:

- (1) 'Consumer' or 'patient' means a person who submits to an eye examination or eye evaluation in this State.
- (2) 'Consumer disclosure' means a written disclosure for the benefit and knowledge of a patient on a form approved by the department as to the incomplete nature of an eye exam that is limited to determining refractive error without a diagnosis or evaluation of any ocular or systemic pathologies.
- (3) 'Contact lenses' means a lens placed directly on the surface of the eye, regardless of whether it is intended to correct a visual defect, and includes, but is not limited to, cosmetic, therapeutic, and corrective lenses.
- (4) 'Department' means the South Carolina Department of Health and Environmental Control.
- (5) 'Dispense' means the act of providing a pair of spectacles or contact lenses to a patient.
- (6) 'Eye examination' or 'eye evaluation' means an assessment of all or a portion of the ocular health profile, which must include a complete written or electronic medical history, as well as an assessment of the visual status of a patient.
- (7) 'Kiosk' means automated equipment or an automated application, which is designed to be used on a phone, computer, or internet-based device that can be used in person or remotely to provide refractive data or information.
- (8) 'Licensing board' means the provider's licensing board established pursuant to Title 40.
- (9) 'Medical history' means a complete collection, written and digital, of all material medical data and a medical profile as is customarily collected under the most recent year's Current Procedural Terminology (CPT) code and which must be retained as part of the patient's medical records in accordance with the provider's professional licensing requirements.
- (10) 'Prescription' means a provider's handwritten or electronic order to correct refractive error that is based on an eye examination.
- (11) 'Provider' means an individual licensed by the South Carolina Board of Examiners in Optometry or the South Carolina Board of Medical Examiners.
- (12) 'Spectacles' means an optical instrument or device worn or used by an individual that has one or more lenses designed to correct or remediate vision deficits or needs of the individual wearer and are commonly known as glasses, including spectacles that may be adjusted by the wearer to achieve different types or levels of visual correction or enhancement, and excluding over-the-counter spectacles not intended to correct or enhance vision or sold without consideration of the visual status of the individual using the spectacles.
- (13) 'Visual status' means the assessment of the visual acuity, accommodation, and ocular alignment of the eyes in an uncorrected state and the best corrected visual acuity achievable with the aid of a spectacle or contact lens prescription; however, the assessment must not be based solely on objective refractive data or information generated by an automated testing device, including an auto refractor or

other electronic refractive-only testing device, to provide a medical diagnosis or to establish a refractive error for a patient as part of an eye examination or eye evaluation.

Section 44-45-20. (A) A person in this State may not dispense spectacles or contact lenses to a patient without a valid prescription from a provider.

(B) To be valid, a prescription must contain an expiration date on spectacles or contact lenses of one year from the date of examination by the provider or a statement of the reasons why a shorter time is appropriate based on the medical needs of the patient. A provider may not refuse to issue a prescription for spectacles or contact lenses to a patient. The prescription must take into consideration medical findings made and refractive error discovered during the eye examination.

(C) A prescription for spectacles or contact lenses may not be based solely on the refractive eye error of the human eye or be generated by a kiosk.

Section 44-45-30. A person may not operate a kiosk in this State unless:

- (1) the kiosk is approved by the United States Food and Drug Administration for the intended use;
- (2) the kiosk is designed and operated in a manner that provides the accommodations required by the federal Americans with Disabilities Act;
- (3) the kiosk and accompanying technology used for the collection and transmission of information and data, including photographs and scans, gathers and transmits protected health information in compliance with the federal Health Insurance Portability and Accountability Act;
- (4) the procedure for which the kiosk is used has a recognized Current Procedural Terminology (CPT) code maintained by the American Medical Association;
- (5) the physical location of the kiosk prominently displays the name and state professional license number of the individual provider who will read and interpret the diagnostic information and data, including photographs and scans;
- (6) diagnostic information and data, including photographs and scans, gathered by the automated equipment is read and interpreted by a provider; and
- (7) the owner or lessee of the automated equipment maintains liability insurance in an amount of not less than two million dollars per occurrence and four million dollars in the aggregate for claims made by individuals diagnosed or treated based on information and data, including photographs and scans generated by the automated equipment.

Section 44-45-40. (A) A provider who fails, without good cause, to comply with the requirements of this chapter must be assessed administrative and professional license penalties as follows:

- (1) for a first violation, a fine of five hundred dollars, a warning letter, and notification to the provider's licensing board;
- (2) for a second violation, a fine of one thousand dollars and monthly reporting of compliance by the provider to the provider's licensing board, under penalty of perjury, for twelve months;

(3) for a third violation, a fine of two thousand five hundred dollars and suspension of the provider's license for ten days; and

(4) for more than three violations, a fine of five thousand dollars and suspension of the provider's license for ninety days or more, as determined by the provider's licensing board.

(B) The department within ten days of assessment shall notify the provider's licensing board of any administrative and professional licensing penalty assessed. Each violation of this chapter constitutes a separate violation for purposes of assessing administrative and professional licensing penalties.

(C) The provider's licensing board shall retain all fine monies assessed and collected pursuant to subsection (B).

(D) A professional licensing board may take disciplinary action against a provider in addition to assessing a penalty required pursuant to subsection (A).

Section 44-45-50. A person or governmental entity that believes there has been a violation or attempted violation of this chapter, or a regulation promulgated pursuant to this chapter, may submit the allegation to the department in writing. If, upon reviewing the written allegation, the department determines there is a reasonable basis for the allegation, the department shall investigate. Nothing in this chapter requires the department to wait until physical injury or other medical harm has occurred to initiate an investigation.

Section 44-45-60. The department, as part of investigating an allegation pursuant to Section 44-45-50, may hold hearings, administer oaths, and order testimony to be taken at a hearing or by deposition conducted pursuant to the South Carolina Administrative Procedures Act and shall report its findings to the provider's licensing board for further disposition as to any possible disciplinary matters.

Section 44-45-70. A person or entity including, but not limited to, a corporation, limited liability company, limited partnership, general partnership, or other non-individual entity, which aids or assists a provider in violating this chapter must be fined in the same amount as the provider whom the person or entity assisted or aided in violating this chapter. The person or entity also may be subject to civil action, including an action for temporary or permanent injunctive relief, in a court of competent jurisdiction as part of a cause of action filed by the South Carolina Attorney General, the department, or a private party for conduct found to constitute repeat violations of this chapter."

SECTION 3. If any section, subsection, paragraph, subparagraph, sentence, clause, phrase, or word of this act is for any reason held to be unconstitutional or invalid, such holding shall not affect the constitutionality or validity of the remaining portions of this act, the General Assembly hereby declaring that it would have passed this act, and each and every section, subsection, paragraph, subparagraph, sentence, clause, phrase, and word thereof, irrespective of the fact that any one or more other sections, subsections, paragraphs, subparagraphs, sentences, clauses, phrases, or words hereof may be declared to be unconstitutional, invalid, or otherwise ineffective.

SECTION 4. This act takes effect upon approval by the Governor.

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This web page was last updated on January 27, 2016 at 11:16 AM

## Missy Jones

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**From:** Missy Jones  
**Sent:** Tuesday, November 24, 2015 10:42 AM  
**To:** 'Jim Morris'  
**Cc:** Angie Combs  
**Subject:** RE: South Carolina Board of Opticians Invitation to Board Meeting

I will add you to our agenda for February 11, 2016.

Please do not hesitate to contact me if you have any further questions or concerns.

Thank you!

Missy D. Jones  
Administrative Assistant  
Office of Board Services  
S.C. Department of Labor, Licensing and Regulation  
110 Centerview Drive, Columbia, S.C. 29210  
South Carolina Panel for Dietetics 803-896-4651  
South Carolina Board of Examiners in Opticianry 803-896-4681  
South Carolina Board of Examiners in Optometry 803-896-4679  
Mailing Address: PO Box 11329, Columbia, SC 29211  
Telephone: 803-896-4660  
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**From:** Jim Morris [<mailto:jmorris@abo-ncle.org>]  
**Sent:** Monday, November 23, 2015 5:25 PM  
**To:** Missy Jones  
**Cc:** ( Angie Combs  
**Subject:** Re: South Carolina Board of Opticians Invitation to Board Meeting

**\*\*\* SCDLLR NOTICE \*\*\* This email is from an external email address. Please use caution when deciding whether to open any attachments or when clicking links inside the email.**

Missy: Thank you for your email. I would be available for February 11. I will verify with Dr. Ferguson as to his availability. However, plan on us being there!

James M. Morris, Esq.\*  
General Counsel & Executive Director  
American Board of Opticianry & National Contact Lens Examiners\*\*  
6506 Loisdale Road, Suite 209  
Springfield, VA 22150  
703.719.5800



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Sent from my iPhone. Please excuse any typographical errors.

On Nov 23, 2015, at 3:45 PM, Missy Jones <[missy.jones@llr.sc.gov](mailto:missy.jones@llr.sc.gov)> wrote:

Dear Mr. Morris,

Please allow me to introduce myself. I am Missy Jones, Administrative Assistant for Mrs. Combs, Administrator for the South Carolina Board of Opticians. I would like to invite you to speak with our Board regarding the memo we received about the ABO & NCLE Hands-On Practical Examination. Below is a list of the Board's 2016 Board Meeting dates. Please let me know which date will work best for you. All Board Meetings are located in Room 204 of the Kingstree Building, 110 Centerview Drive, Columbia, SC 29211.

Date	Time
February 11, 2016	9:00 am – 12:00 pm
June 23, 2016	9:00 am – 12:00 pm
October 6, 2016	9:00 am – 12:00 pm

Please do not hesitate to contact me if you have any further questions or concerns.

Thank you!

Missy D. Jones  
Administrative Assistant  
Office of Board Services  
S.C. Department of Labor, Licensing and Regulation  
110 Centerview Drive, Columbia, S.C. 29210  
South Carolina Panel for Dietetics 803-896-4651

South Carolina Board of Examiners in Opticianry 803-896-4681  
South Carolina Board of Examiners in Optometry 803-896-4679  
Mailing Address: PO Box 11329, Columbia, SC 29211  
Telephone: 803-896-4660  
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Email: [missy.jones@llr.sc.gov](mailto:missy.jones@llr.sc.gov)  
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## Missy Jones

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**From:** Missy Jones  
**Sent:** Monday, November 23, 2015 3:46 PM  
**To:** 'jmorris@abo-ncle.org'  
**Cc:** ; Angie Combs  
**Subject:** South Carolina Board of Opticians Invitation to Board Meeting  
**Importance:** High

Dear Mr. Morris,

Please allow me to introduce myself. I am Missy Jones, Administrative Assistant for Mrs. Combs, Administrator for the South Carolina Board of Opticians. I would like to invite you to speak with our Board regarding the memo we received about the ABO & NCLE Hands-On Practical Examination. Below is a list of the Board's 2016 Board Meeting dates. Please let me know which date will work best for you. All Board Meetings are located in Room 204 of the Kingstree Building, 110 Centerview Drive, Columbia, SC 29211.

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Thank you!

Missy D. Jones  
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February 11, 2015

TO: SC Board of Opticianry:

I appear before you today to request reinstatement of my SC Opticians license.

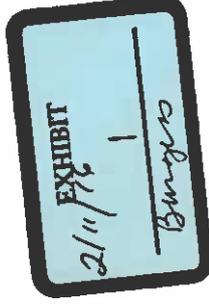
Due to medical and financial reasons I was unable to re-new in a timely manner.

I have been a licensed optician here in this state for 26 plus years and believe I have maintained a good representation of this profession.

I attended the continuing education hours in Columbia in January of 2014 and 2015 and can provide my certificates.

Thank you for your consideration.

*Janice L. Burgess*  
Janice L. Burgess  
Lic #554



Original  
Opticianry 2-11-15