

**SOUTH CAROLINA BOARD OF EXAMINERS IN OPTOMETRY  
REVISED AGENDA**

**Board Meeting, February 10, 2016, 3:00 P.M.  
Synergy Business Park, Kingstree Building, Room 204  
110 Centerview Drive, Columbia, South Carolina**

**Public Notice of this meeting was properly posted at the Optometry Board's 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**

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

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

**Approval of October 28, 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**

**REPORTS / INFORMATION \*TAB 5**

**Administrative Information – April Koon**

- a. Licensee Totals
- b. Endorsement Applicant Report - *add names*
- c. Financial Report
- d. Continuing Education (CE) - Course Approvals
  1. International Vision Expo & Conference East 2016
  2. South Carolina Chapter of the American Academy of Optometry – Dr. Tony Van Alstine
  3. 2016 SCOPA Spring CE Meeting
- e. Associates of Regulatory Boards of Optometry (ARBO) Annual Meeting June 26 -28, 2016
- f. Statement of Economic Interests – Due on March 30, 2016 – Reminder \*NHO

**UNFINISHED BUSINESS \*TAB 6**

1. Endorsement Application Revision - *info only*
2. Branch Office Fees – Executive Session
3. Opternative Online Eye Exam - *top*

**NEW BUSINESS \*TAB 7**

1. Vision Screening Inquiry
2. CE Broker – Dylan Sitterle - *Spearsman / Van Keen - motion carryover - Amend Agenda to may mtg.*
3. ACOE's Professional Optometric Degree Standards – Comments on second draft of the proposed Professional Optometric Degree Program Standards
4. Elect Media Designee \*NHO
5. Parameters for Election of Board Officers \*NHO
6. Election of Board Officers \*NHO - *Issac wish to serve - make a new badge send the to Katie @ Gov. off.*

7. Board Certification – Dr. Vaught \*NHO

8. Eye Care Consumer Protection Law (S.1016 & H.4723) – Executive Session

*Update carryover*

9. Delegation of Authority to New Board Administrator – Executive Session \*NHO



*Copy of fixed bill  
Dr. Cannon*

**PUBLIC COMMENTS**

**ANNOUNCEMENTS**

Upcoming Board Meeting – May 4, 2016

**ADJOURNMENT**

\*NHO = No Hand outs

**SOUTH CAROLINA BOARD OF EXAMINERS IN OPTOMETRY**

**SIGN IN SHEET**

**NAME**

**EMAIL**

**ORGANIZATION NAME**

Dr. Anthony Van Alstine

\_\_\_\_\_

AAO SC chapter

\_\_\_\_\_

Dr. Wayne Cam

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7. Board Certification – Dr. Vaught **\*NHO**
8. Eye Care Consumer Protection Law (S.1016 & H.4723) – Executive Session
9. Delegation of Authority to New Board Administrator – Executive Session **\*NHO**

**PUBLIC COMMENTS**

**ANNOUNCEMENTS**

Upcoming Board Meeting – May 4, 2016

**ADJOURNMENT**

**\*NHO = No Hand outs**

# 2016 SCOPA Spring Meeting

Please make plans to attend the SC Optometric Physicians Association's Spring Meeting to be held March 11-13, 2016 at the Hyatt Regency in Greenville, SC. **10.0 hours of continuing education will be offered.** For additional information about this meeting contact the SCOPA office by calling 803-799-6721, toll free 877-799-6721 or via e-mail at [abalderson@sceyedoctors.com](mailto:abalderson@sceyedoctors.com).

## Friday, March 11, 2016

4:00 - 5:00 pm: Registration  
 5:00 - 7:00 pm: Sleep Apnea and the Eye (1 hour)  
 Systemic Pharmaceuticals and Pain Control (1 hour)  
 Brad Sutton, OD

## Saturday, March 12, 2016

7:00 - 8:00 am: Continental breakfast - Visit with Vendors!  
 8:00 - Noon: Injectable Medication in Eye Care (2 hours)  
 Cancer and the Eye: Ocular Tumors, Malignancies and Neoplasms  
 Brad Sutton, OD  
 Noon - 2:00 pm: Lunch on Your Own  
 2:00 - 4:00 pm: The Changing Face of Eye Care: Novel Developments, Emerging Treatments and Innovative Technologies  
 Chris Wroten, OD

## Sunday, March 13, 2016

7:00 - 8:00 am: Continental breakfast - Visit with Vendors!  
 8:00 - 10:00 am: Diabetes from A to Z  
 Chris Wroten, OD



Be sure to check out Falls Park!  
 Falls Park joins the ranks of the nation's finest parks, chosen as number 10 of the country's best parks by the 2014 Travelers' Choice Trip Advisor awards.

# SCOPA Spring Meeting Registration Form

Please complete this registration form and return to the SCOPA Office along with a check or credit card number. (Visa/MC/Amex/Discover)

**Registration Rates: \$225 SCOPA/AOA Members**  
**\$350 Non Members**  
**10.0 hours CE Available**

Name: \_\_\_\_\_  
 AOA Number: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Daytime Phone Number: \_\_\_\_\_  
 E-mail Address: \_\_\_\_\_  
 Credit Card: \_\_\_\_\_  
 Expiration Date: \_\_\_\_\_ CVV: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Amount to be charged to card:  \$225  \$350  Other \$ \_\_\_\_\_  
 Signature: \_\_\_\_\_

**If paying by check, please make payable to SCOPA and mail to:**

SCOPA Spring Meeting  
 2730 Devine Street  
 Columbia, SC 29205

**SCOPA Cancellation Policy:** Cancellations received by February 22, 2016 will receive a full refund. Cancellations made February 23rd and forward will yield a refund less a \$75 processing fee. Substitutions are permitted at any time. Please alert the SCOPA office of any changes. No refunds will be made for individuals who attend a portion of the meeting. No refunds will be made for cancellations due to inclement weather. It is the policy of the SCOPA to hold all meetings unless weather conditions are extreme. If the SCOPA is forced to cancel the meeting in its entirety, liability is limited only to the registration fee.



SC Optometric Physicians Association  
 2730 Devine Street  
 Columbia, S.C. 29205  
 Phone: 803-799-6721 Fax: 803-799-1064  
 E-mail: [info@sceyedoctors.com](mailto:info@sceyedoctors.com)  
 Website: [www.sceyedoctors.com](http://www.sceyedoctors.com)



Spring Continuing Education  
 March 11-13, 2016 - 10 hours of CE Offered  
 Greenville, SC

Tab 5 d. #3

**Dr. Brad Sutton**

**Sleep Apnea and the Eye:** This course covers sleep apnea and the multiple systemic and ocular conditions that can be associated with it. The epidemiology, natural history, diagnosis, and treatment of sleep apnea are addressed. The associations between sleep apnea and many systemic co-morbidities are discussed, including diabetes, heart disease, hypertension, and stroke. Many ocular conditions which are related to sleep apnea are covered including Floppy Eyelid Syndrome, keratoconus, glaucoma, NAION, ICS, and papilledema. An emphasis is placed upon the role that sleep apnea plays in each of these conditions, and how effective management of the sleep apnea helps to control the associated condition.

**Systemic Pharmaceuticals and Pain Control:** This course covers the optometric use of oral medications. Classes covered include antibiotics, oral steroids, oral antivirals, NSAIDs, and narcotic pain medications. Monitoring for ocular toxicity of Plaquenil use is also discussed.

**Injectable Medication in Eye Care:** Pharmaceutical properties of and uses for various medication utilized in injectable therapy will be presented. Agents such as anesthetics, steroids, antibiotics and diagnostic dyes will also be discussed in detail.

**Cancer and the Eye: Ocular Tumors, Malignancies and Neoplasms:** Learn about the epidemiology and principles of systemic cancer, with details about ocular malignancies, including the differential diagnosis and management.

**Dr. Chris Wroten**

**The Changing Face of Eye Care: Novel Developments, Emerging Treatments and Innovative Technologies:** This course reviews some of the newest and yet-to-be-approved diagnostic techniques, innovative therapeutic treatments, and developing technologies in diagnostic pharmaceutical, and surgical eye care. The impact of these treatments and technologies on patient outcomes and on how eye care is delivered is also discussed, as well as how future trends may impact eye care delivery models. Specific emphasis is on the areas of glaucoma, cataracts, retinal disease diabetic and non-diabetic, gene therapy, minor periorcular and intraocular surgical procedures, and novel drug delivery methods.

**Diabetes A to Z:** This course reviews the anatomy and physiology of this systemic disease, which is nearing epidemic proportions and now affecting patients of all ages. Also discussed at length are the epidemiology of diabetes; its various types; diagnostic criteria; medications used for treatment, including their various mechanisms of action; non-pharmaceutical treatment options; patient counseling tips & resources; and disease complications.

It is attendees responsibility to confirm credit has been submitted to the appropriate State Board offices. The SCOPA is not responsible for any fines or penalties assessed for continuing education not reported to the desired agencies. Per the SC Board of Examiners in Optometry policy, OD's are responsible for keeping copies of their CE cards if asked for an audit. SCOPA can no longer report hours for OD's. Valid name badges must be worn by attendees for admission into the lecture hall. No one will be admitted into the lecture hall 10 minutes after the lecture begins. Entrance and exit of course attendees will be monitored to meet State Board Regulations. Attendees may only be absent from any class for a maximum of 10 minutes per hour of lecture. If the attendee is absent more than the allotted time, the attendee will be allowed to return to the lecture hall, but will not receive credit for that lecture. Upon completion of desired number of hours, please return CEU card for a monitor's signature. You will be given a copy for your records and the SCOPA will keep one as well.



Hyatt Regency Greenville

\$159 per night plus tax (Single/Double)

\$169 per night plus tax (Triple)

Reservations must be made by February 19, 2016

to receive the block rate.

For reservations call 864-235-1234 and mention SCOPA.

Want to enjoy all that Greenville has to offer?  
Visit [www.visitgreenvillesc.com](http://www.visitgreenvillesc.com).

yeah, that greenville



Dr. Brad Sutton received his Bachelor of Arts degree in psychology from Indiana University in 1989 and his optometry doctorate from IU in 1993. Upon graduating, he accepted a one-year residency in ocular disease and surgical co-management at Omni Eye Services in Memphis, Tennessee. After completing the residency he remained with the center as its director from 1994 to 1999. In November of 1999 he returned to IU to become the clinic director at the Indianapolis Eye Care Center. He is heavily involved in patient care, clinical teaching, administration, and lecturing in the ocular disease courses.

Dr. Sutton's main areas of clinical interest include ocular disease and surgical co-management. He has given approximately 250 continuing education lectures on topics related to ocular disease at the local, state, national, and international level. He has also published numerous journal articles and a book chapter. Dr. Sutton is a member of the American Optometric Association, a fellow in the American Academy of Optometry, a fellow in the Optometric Retina Society, and is board certified by the American Board of Certification in Medical Optometry.



Prior to joining The Bond-Wroten Eye Clinic as a partner, Dr. Chris Wroten provided primary eyecare as an independent optometric physician in the greater Memphis area, volunteered at the Memphis Church Health Center, and worked for several years in private practice at West Tennessee Eye.

Dr. Wroten has also participated in clinical research, authored clinical case reports, and presented educational posters and workshops at national optometric conferences. He is an adjunct professor at Southern College of Optometry and at the University of Alabama-Birmingham College of Optometry.

In addition to primary eyecare, Dr. Wroten's special areas of interest lie in treatment and management of ocular disease. He is a devoted husband to his wife, Dr. Sarah Wroten, also on staff at The Bond-Wroten Eye Clinic, and is a loving father to his daughter, Emily, and son, Ben.

South Carolina Department of Labor, Licensing and Regulation (LLR)  
Board of Examiners in Optometry  
Board Minutes  
October 28, 2015  
Synergy Business Park  
110 Centerview Drive, Kingstree Building, Room 204  
Columbia, South Carolina

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.

**BOARD MEMBERS PRESENT:**

Dr. Derek Van Veen, President  
Dr. Peter V. Candela, Vice President  
Dr. Thomas E. Tucker  
Dr. William Spearman  
Isaac L. Johnson, Jr., Esquire, Public Member

**BOARD MEMBER ABSENT:**

Dr. James E. Vaught

**VACANT POSITION:**

Public Member (One)

**SCLLR STAFF PRESENT:**

Mary League, Esquire, Office of Advice Counsel  
Angie M. Combs, Administrator  
Missy L. Jones, Administrative Assistant  
*For IRC Report:*  
David Love, Chief Investigator, Office of Investigations and Enforcement  
Adriane Rivera, Investigator, Office of Investigations and Enforcement  
*For ODC Report and MOA Hearing:*  
Erin Baldwin, Esquire, Office of Disciplinary Counsel  
Shanika Johnson, Esquire, Office of Disciplinary Counsel

**PRESENT:**

Tina F. Behles, Nationally Certified Court Reporter  
Dr. Joel G. Bailey

**CALL TO ORDER:** At 3:04 p.m. the Board meeting was called to order by Dr. VanVeen.

**APPROVAL OF AGENDA:** A **motion** was made by Dr. Spearman to accept the order of the October 28, 2015 Agenda. The motion was seconded by Dr. Candela and carried unanimously.

**APPROVAL OF ABSENT BOARD MEMBER(S):** A **motion** was made by Dr. Spearman to approve Dr. Vaught's absence. The motion was seconded by Mr. Johnson and carried unanimously.

**APPROVAL OF JULY 29, 2015 MEETING MINUTES:** A **motion** was made by Dr. Candela to accept the July 29, 2015 minutes as written. The motion was seconded by Dr. Tucker and carried unanimously.

**OFFICE OF INVESTIGATIONS AND ENFORCEMENT (OIE) REPORT:** Mr. Love presented the OIE Statistical Report. The Board accepted this report as information.

**INVESTIGATIVE REVIEW COMMITTEE (IRC) REPORT:** Mr. Love provided the IRC Report from the September 23, 2015 IRC meeting. It was recommended to dismiss Case #2015-10. A **motion** was made by Dr. Spearman to accept the IRC dismissal recommendations for Case #2015-10. The motion was seconded by Dr. Candela and carried unanimously.

**OFFICE OF DISCIPLINARY COUNSEL (ODC) REPORT:** Ms. Baldwin reported that Case #2014-8 is being brought before the Board at this meeting. Ms. Baldwin also introduced Ms. Shanika Johnson as the new Board's Disciplinary Counselor.

**MEMORANDUM OF AGREEMENT HEARING – CASE #2014-8:** Case #2014-8 was brought before the Board for final decision and sanction. A **motion** was made by Dr. Spearman to go into Executive Session to receive legal advice. The motion was seconded by Mr. Johnson and carried unanimously. A **motion** was made by Mr. Johnson to come out of Executive Session. The motion was seconded by Dr. Tucker and carried unanimously. A **motion** was made by Dr. Candela to go back into Executive Session to receive legal advice. The motion was seconded by Dr. Spearman and carried unanimously. A **motion** was made by Dr. Spearman to come out of Executive Session. The motion was seconded by Mr. Johnson and carried unanimously. A **motion** was made by Mr. Johnson to accept the Memorandum of Agreement; to impose a public reprimand; to impose \$500.00 fine; Dr. Bailey's license shall be subject to a five year suspension that is stayed subject to compliance with the conditions of the order which include abstinence from mood-altering substances unless there's a legitimate medical purpose which must be reported to the board; and he be subject to alcohol and drug testing at his expense; that he continue to comply with the RPP contract until a period of not less than five years of documented sobriety and compliance is established and until further direction of the Board, at which time the Board will consider requiring the RPP Senior Program or other appropriate program; and that he is prohibited from prescribing controlled substances. The motion was seconded by Dr. Spearman and carried unanimously.

### **REPORTS / INFORMATION**

- Licensee Totals – there are 849 S.C. licensed optometrists; 546 practice in South Carolina.
- Endorsement Applicant Report – one endorsement candidate have been licensed since July 20, 2015 through October 26, 2015.
- Financial Report - provided and accepted as information.
- Board Member Election – Mrs. Combs gave a brief report on the Board member elections that were held at S.C. Optometric Physicians Association Business Meeting on August 20, 2015.
- Continuing Education (CE) Course Approvals – no courses presented for approval.

### **UNFINISHED BUSINESS**

**Branch Office Registration Fees:** This item will be carried over to the next scheduled Board Meeting.

**Endorsement Application Fees:** The motion that was made at the July 29, 2015 Board Meeting to add an additional \$100.00 fee for all Endorsement Applications was upheld and is effective immediately.

### **NEW BUSINESS**

**Opternative Online Eye Exam:** This item is carried over to the next scheduled Board Meeting. Ms. Combs will contact the South Carolina Optometric Physicians Association to obtain an update on their stance concerning Opternative.

**Finalize 2016 Board Meeting Dates:** The Board requested that Mrs. Jones email the Board with the list of 2016 Board Meeting dates to be finalized.

### **PUBLIC COMMENTS**

There were no public comments.

### **ANNOUNCEMENTS**

The next Board meeting is tentatively scheduled for February 10, 2016; date to be confirmed.

### **ADJOURNMENT**

A **motion** was made by Mr. Johnson, seconded by Dr. Candela, and unanimously carried to adjourn the meeting. Dr. Van Veen adjourned the meeting at 4:50 p.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 10, 2016**

**South Carolina Board of Examiners in Optometry**

**Statistical Board Report**

<b>Case Status (Optometry cases received from 1/1/2015 thru 1/26/2016)</b>	<b>Total</b>
<b>Closed (Avg days: 126) (OPTOMETRY)</b>	<b>7</b>
<b>Do Not Open Case (Avg days: 3) (OPTOMETRY)</b>	<b>1</b>
<b>Pending Board Action (Avg days: 179) (OPTOMETRY)</b>	<b>7</b>
<b>Total</b>	<b>15</b>

**Date: February 10, 2016**

**IRC held on January 26, 2016**

**South Carolina Board of Examiners in Optometry**

**IRC Board Case Recommendation Report**

**Dismissals – 6**

**Letter of Caution - 1**

**IRC Members**

**Shanika Johnson – Attorney**  
**Dr. Timothy Stafford – IRC Advisor**  
**Dr. Wayne Cannon – IRC Advisor**  
**Missy Jones- Administrative Assistant**  
**Adrian Rivera - Investigator**  
**David Love – Chief Investigator**

**DISMISS**

<b>Case #</b>	<b>Investigator</b>	<b>Initial Complaint Allegations</b>	<b>IRC Logic</b>
<b>2015-7</b>	Adrian Rivera	Complaint alleges Respondent (OD) of substandard care by failing to provide a minimum eye examination by his failure to perform the following: 1. Patient case history. 2. Evaluation of pupils. 3. Confrontation visual fields. 4. Dilated examination of the peripheral retina and failure to discuss pupil dilation with patients.	IRC met on 01/26/2016 and recommended dismissal. IRC findings were Respondent's examinations were done correctly.
<b>2015-9</b>	Adrian Rivera	Complaint alleges Respondent (OD) of substandard care concerning a prescription for glasses.	IRC met on 01/26/2016 and recommended dismissal. Patient glasses had bifocal lenses; patient had never worn bifocals and was not using glasses correctly.
<b>2015-11</b>	Adrian Rivera	The complaint alleges Respondent (OD) of unprofessional conduct concerning the automatic scheduling and billing of an appointment that the patient never scheduled.	IRC met on 01/26/2016 and recommended dismissal. Fee was waived by office and it was noted in patient's file that patient will schedule any future appointments.

<b>2015-12</b>	Adrian Rivera	Complaint alleges Respondent (OD) of substandard care concerning the non-diagnosis of a right eye retina tear for patient on 4/01/2015.	IRC met on 01/26/2016 and recommended dismissal. Retina tear was not present when Respondent examined patient.
<b>2015-13</b>	Adrian Rivera	Complaint alleges Respondent (OD) of substandard care concerning the improper adjustment of the exam chair on 03/11/2015, for patient, which resulted in neck pain.	IRC Logic - IRC met on 01/26/2016 and recommended dismissal. No evidence found to prove patient injury was due to exam chair.
<b>2015-14</b>	Adrian Rivera	Complaint alleges Respondent (OD) of substandard care concerning a contact and eye exam on 09/22/2015, where patient was given the wrong prescription.	IRC met on 01/26/2016 and recommended dismissal. Patient was not seen by Respondent on initial visit.
<b>Total Cases: 6</b>			

**LETTER OF CAUTION**

<b>Case #</b>	<b>Investigator</b>	<b>Initial Complaint Allegations</b>	<b>IRC Logic</b>
<b>2015-8</b>	Adrian Rivera	Complaint alleges Respondent (OD) failed to maintain or provide records as requested.	IRC met on 01/26/2016 and recommended a letter of caution advising the Respondent to be aware of the need to keep accurate treatment records on patients being treated.
<b>Total Cases: 1</b>			



**Reports/Information Tab 5 a & b**

**Administrative Information – April Koon**

**a. Licensee Totals**

Total of all licensees – 865

Instate licensee total – 550

Out-of-state licensee total – 315

**b. Endorsement Applicant Report**

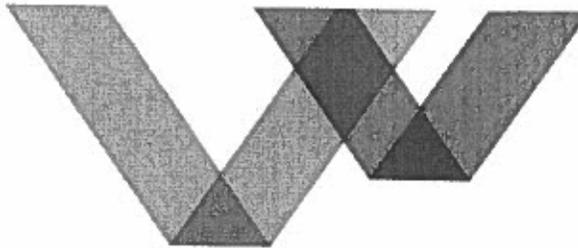
Total of licensees since October 29, 2015 through February 3, 2016 – 3

<b>License Number</b>	<b>State(s) Licensed</b>	<b>Parts of National Exam Taken &amp; Passed</b>
OPT. 1912	North Carolina	Part I, IIA, and IIB
OPT. 1913	New Jersey & Pennsylvania	Basic & Clinical Science and TMOD
OPT. 1915	Texas, Georgia, Kansas & Missouri	Basic & Clinical Science and TMOD

Tab 5  
C

Optometry Board  
DB0019

		June 2014 Cash Balance	June 2015 Cash Balance	Dec 2015 Cash Balance
		<u>FY14</u>	<u>FY15</u>	<u>FY16</u>
Beginning Cash Balance		85,566.02	(18,437.11)	64,843.90
Total Revenue		28,006.25	228,674.28	10,120.00
Total Direct Expenditures		(61,173.24)	(80,149.64)	(27,907.17)
Indirect Expenditures (Overhead):				
Admin/Dir/Adv Cou- Based on Previous Yr	.864%	(22,321.94)	(25,800.86)	(10,728.14)
POL Admin - Based on Previous Yr	.864%	(2,410.71)	(8,787.85)	(3,789.59)
OLC - Former POL Program		0.00	0.00	0.00
OIE - Based on No. of Investigations	.481%	(19,522.66)	(11,288.05)	(7,448.07)
Legal - Based on No. of Investigations	.481%	(6,814.89)	(4,058.44)	(2,695.91)
Office of Business Services - Based on Prev		(6,822.74)	0.00	0.00
Office of Health & Medical Rel Bds - Based	0.000%	0.00	0.00	0.00
Remittance to General Fund - Proviso 81.3	10.00%	(6,117.32)	(8,014.96)	0.00
Communications-Based on Prev Yr Exp	.864%	(1,815.14)	(1,988.47)	(543.41)
Immigration Proviso 81.8-Based on Prev Yr	.864%	(1,661.42)	(1,636.36)	(435.48)
Osha Proviso 81.7-Based on Prev Yr Exp	.864%	(3,349.32)	(3,668.64)	0.00
Total Indirect Expenditures (Overhead)		(70,836.14)	(65,243.63)	(25,640.60)
NET		(104,003.13)	83,281.01	(43,427.77)
Year End Balance		(18,437.11)	64,843.90	21,416.13



Tab 5  
# d 1

January 6, 2016

Ms. Angela Combs  
Board Administrator  
South Carolina Board of Optometry  
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 conference program. I am requesting approval of the entire Optometry program with 230 hours of continuing education.

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

Sincerely,

A handwritten signature in cursive script that reads 'Leigh Mann'.

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

Enclosures

**INTERNATIONAL VISION EXPO 2015**

EDUCATION: WEDNESDAY, SEPTEMBER 16-SATURDAY, SEPTEMBER 19, 2015

EXHIBITION: THURSDAY, SEPTEMBER 17-SATURDAY, SEPTEMBER 19, 2015

SANDS EXPO & CONVENTION CENTER | LAS VEGAS, NV | [VisionExpoWest.com](http://VisionExpoWest.com) | [#VisionExpo](https://twitter.com/VisionExpo)



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.

11B2

**Preparing Your Practice for the Future: EHR Incentive Audits, ICD-10 and Quality Reporting**

1:30 PM – 3:30 PM

2 Hours

Jay Henry, OD; Philip Gross, OD

This course will provide an overview of the EHR Incentive audit process and provide a template to survive, as well as prepare you for ICD-10, Quality Reporting changes, and other health care changes.

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"?

11C1

**The Basics of Uveitis**

1:30 PM – 3:30 PM

2 Hours

Walter Whitley, OD

Uveitis is one of the leading causes of preventable blindness in developed countries, which makes it crucial for practicing optometrists to understand how best to diagnose, differentiate and treat it. Using case examples, this course will review both ocular and systemic associations of the disease, review laboratory testing, and current/future treatment options.

11C2

**The Best of the Worst Ocular Urgencies and Emergencies**

1:30 PM – 3:30 PM

2 Hours

Andrew Gurwood, OD; Marc Myers, OD

Cases of current methods of treating ocular emergencies and urgencies. Includes the ocular adnexa and lacrimal system, mechanical and infectious involvement of the anterior segment, urgent glaucomas, and posterior segment disease.

11C3

**Is This Glaucoma?**

1:30 PM – 3:30 PM

2 Hours

Leo Semes, OD

Using a series of cases, this course will challenge the audience to make management decisions with increasingly more information. The presenters will offer real-life cases de-identified that present every-day situations in glaucoma and related optic disc changes.

11C4

**Oculoplastic and Aesthetic Eye Care in an Optometric Practice - Opportunity Abounds!**

1:30 PM – 3:30 PM

2 Hours

Louise Scalfani, OD; S. Barry Eiden, OD; Kathleen Albrecht, MD

The opportunities to address significant needs of your patients regarding ocular plastic surgical options as well as a host of other aesthetic eye and facial treatments exist on a daily basis in the primary care optometric practice. This course will review surgical options such as blepharoplasty, eyelid bag repair, dermal fillers, Botox and others. The presenters will share their own clinical experiences in bringing aesthetic eye care services to the optometric practice.

11C5

**Technological Advances in Eye Care**

1:30 PM – 3:30 PM

2 Hours

Peter Shaw McMinn, OD; Douglas Devries, OD; Jerome Sherman, OD; Kirk Smick, OD

This unique course describes an overview of new technologies that are available or will soon be available to the ECP to improve patient care. Eye care providers are often so busy that it is difficult to keep up with the latest technology and practices. This course will introduce the attendee to new products, exam procedures, and treatment strategies developed in the past few years. The experts will discuss changes in eyecare in the areas of instrumentation, spectacle lenses, contact lenses, therapy procedures, medications, and surgical procedures to improve and maintain vision. Websites for additional information will be distributed to attendees. The audience will have an opportunity to ask questions and interact with the speakers.

11C6

**Building the Medical Model**

1:30 PM – 3:30 PM

2 Hours

Scot Morris, OD

Learn the strategies and secrets of developing the medical aspect of your practice. Discover the tools, the philosophy and the strategies of developing the medical model.

11L1

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

1:30 PM – 3:30 PM

2 Hours

Melissa Barnett, OD; Thomas Quinn, 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.

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.

12C1

**The Good, The Bad and the Orals**

3:45 PM – 5:45 PM

2 Hours

Walter Whitley, OD

Using case examples, this course will review commonly prescribed oral medications used for various ocular infections, inflammatory conditions and pain. Common side effects of oral medications will be discussed.

12C2

**Neuro For the Rest of Us**

3:45 PM – 4:45 PM

1 Hour

William Marcolini, OD

This course is for the rest of us...the primary care optometrist, where encounters with complex neurological findings can be overwhelming. The course provides basic instruction for the detection, diagnosis and proper treatment of the differentials of optic nerve edema, visual field defects, cranial nerve palsies and pupil abnormalities.

12C3

**Ocular Manifestations of Diabetes**

3:45 PM – 5:45 PM

2 Hours

Andrew Gurwood, OD; Marc Myers, OD

Included in the discussion are review of diabetic eye disease pathologic processes, epidemiology, pathologic processes of retinopathy formation, and review of the National Eye Institute studies which guide treatment decisions and instrumentation.

12C4

**A Day in the Retina Clinic**

3:45 PM – 5:45 PM

2 Hours

Leo Semes, OD

This course is a potpourri of fundus disorders. They include curious as well as varying presentation of diabetic and hypertensive fundus changes. Diagnostic and management guidance for clinical practice will be discussed. In addition differentials and management strategies will be offered.

12C5

**Avoiding Malpractice Over a Lifetime of Eye Care**

3:45 PM – 5:45 PM

2 Hours

Jerome Sherman, OD

Perhaps the best way to avoid optometric malpractice is to learn from the mistakes of others. This course highlights the factors that must exist for a doctor to be culpable of malpractice along with the present standards of care. The major etiologies responsible for malpractice allegations are highlighted and include precursors to retinal detachment, glaucoma and eye and visual pathway tumors. The participant will learn what not to do in order to prevent malpractice allegations.

12C6

**Best of OD's on Facebook: Clinical Tales from the Trenches**

3:45 PM – 5:45 PM

2 Hours

Ben Gaddie, OD; Scot Morris, OD; Mark Dunbar, OD; Andrew Morgenstern, OD; Diana Shechtman, OD;

You will be introduced to the varied clinical cases colleagues discuss 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 clinical analysis, with the goal of ultimately improving diagnosis and outcomes.

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.

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.

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.

13C2

**How to Develop a Dry Eye Center**

5:00 PM – 6:00 PM

1 Hour

Whitney Hauser, OD

This course demonstrates how advanced dry eye treatment can be seamlessly incorporated into a primary care optometric office. Any practice can tackle this epidemic problem effectively and efficiently in a few easy steps. Innovative diagnostics and procedures will be discussed as well as how to present options to patients to provide the greatest return for your practice.

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.

21C1

**One of those Days---!!! A Day in the Life of a Full Scope OD**

7:15 AM – 9:15 AM

2 Hours

Scot Morris, OD

A full schedule, complicated cases, prescribe, fit, RUN!!!. Lunch--Yeah, right!!!. Join us as we investigate how to turn your busy days into a fun, profitable and productive day. Sales, marketing, diagnosis, therapeutics, consults, referrals, inventory decision, HR problems. We cover it all in this "how to get it done" course.

21C2

**Top 5 Things that Every OD Should Know About the Cornea**

7:15 AM – 8:15 AM

1 Hour

William Marcolini, OD

The cornea is such a vital part of your patient's vision and a structure that must be evaluated on every eye exam. This course will focus on common and not so common disorders of the cornea. Infectious keratitis, erosions, dystrophies and surgical interventions will be discussed.

21C3

**Uveitis**

7:15 AM – 8:15 AM

1 Hour

Charlie Ficco, OD

This course is designed to serve as a practical guide for the treatment and management of uveitis. Emphasis will be placed on anterior uveitis, but all aspects of the disease will be discussed. Topics covered will include differential diagnosis, systemic work-up, treatment options, and prognoses.

21C4

**Concussion and Vision: What Every Optometrist Should Know About Identifying the Problem**

7:15 AM – 8:15 AM

1 Hour

Allen Cohen, OD; Neera Kapoor, OD

This course will provide an evidence-based overview of the following aspects of concussion: pathophysiology, epidemiology, inter-professional aspects, associated functional visual problems, visual information processing deficits and behavioral consequences, and high-yield primary eye care examination procedures to identify visual sequelae following concussion.

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.

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.

22B6

**Meaningful Use Update**

8:30 AM – 10:30 AM

2 Hours

Jay Henry, OD; Philip Gross, OD

This course will provide a clinical look at Meaningful Use Stage 1 and Stage 2 objectives in detail including requirements, clinical implications, exemptions, compliance and how to navigate the different stages. Don't be left behind.

22C2

**Update on Medical Therapy**

8:30 AM – 9:30 AM

1 Hour

Murray Fingeret

There have been subtle changes in how individuals with glaucoma are managed medically including the role of fixed combination agents and the importance of target pressures. This course will describe changes in medical therapy and how they may be integrated into the care of those with glaucoma.

22C3

**The Structure-Function Junction**

8:30 AM – 9:30 AM

1 Hour

Paul Karpecki, OD; Craig Thomas, OD

This course reviews the application of new functional testing in combination with structural imaging as a method of diagnosing and monitoring glaucoma and glaucoma suspects. The course details the use and appropriate applications of new technologies such as icVEP, VEP, ERG, pupillography, computerized color vision, OCT and Fundus photography.

22C4

**A Common Sense Approach to Medical Billing and Coding: Keep Your Eye on the Ball**

8:30 AM – 11:30 AM

3 Hours

Charles Stuckey, OD; Steven Eiss, OD

A review of ICD and CPT codes as they relate to coding and billing medical eye care services. Strong emphasis on chart documentation required to code and bill medical eye care services with a focus on 99000 E&M vs. 92000 ophthalmology codes, billing intermediate and comprehensive examinations and special procedures, and post-operative care including glasses after cataract surgery. Additionally, there will be a presentation on optometrist's role in medical eye care to include billing medical insurance vs. vision benefit plans.

22C5

**Brand vs. Generic – Are They Really Different**

8:30 AM – 9:30 AM

1 Hour

Eric Schmidt, OD

Insurance companies as well as pharmacists are increasingly demanding that generic drugs be prescribed for our patients. But often these generic drugs may not be what we would like our patients to have. This course will detail differences between generic and branded ophthalmic drugs and point out differences in both side effect profile as well as therapeutic effects. Strategies will be delineated as to how we can help our patients to get the drugs that the doctor truly wants them to receive.

22C6

**The Shifting Sands of Dry Eye and MGD - Expert Perspective**

8:30 AM – 10:30 AM

2 Hours

Ben Gaddie, OD; Dave Kading, OD; Arthur Epstein, OD

This course will look at Meibomian Gland Dysfunction (MGD) which is one of the main causes of dry eye disease and ocular surface disease. We will explore the work up for patients with MGD, including meibomian gland diagnostic expression, overall lid and demodex evaluation, validated patient questionnaires as well as tear osmolarity. We will discuss imaging of the meibomian glands and new treatments for restoring function to the glands. Finally, we will discuss strategies for long term maintenance of lid hygiene.

22C7

**Concussion and Vision: An Overview of Optometric Solutions**

8:30 AM – 9:30 AM

1 Hour

Allen Cohen, OD; Neera Kapoor, OD

This course will provide an evidence-based overview of the following aspects of concussion: epidemiology, inter-professional aspects, associated visual symptoms, principles of neuroplasticity, and high-yield neuro-optometric rehabilitation therapy procedures to manage vision sequelae following concussion.

22C8

**Straight Outta Tears: Treating and Managing MGD, Lid Bugs and Other Lid Thugs!**

8:30 AM – 9:30 AM

1 Hour

Marc Bloomenstein, OD

This course will focus on the eyelids and all the nasty and unsavory creatures that affect the eye's health. The advent of new diagnostic equipment has enabled clinicians to make point of service differentiating. Treatment options can range from over the counter management, to prescription medications, as well as in office procedures. Getting the lids right will make the vision tight.

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.

23B3

**Practice Transitions: 10 Mistakes to Avoid When You Buy, Sell or Take In a Partner**

9:45 AM – 10:45 AM

1 Hour

Jerry Hayes, OD; Nathan Hayes

Whether it's taking in an associate or selling a practice, many OD transactions don't stand the test of time. Drawing on his decades of experience as a practice transition consultant, Dr. Hayes will discuss the most common mistakes both senior and junior OD's make in the areas of practice valuations, partnership agreements and associate compensation.

23B5

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

9:45 AM – 10:45 AM 1 Hour

Gary Gerber, OD; Mark Wright, OD; April Jasper, OD; Neil Gailmard, 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.

23C1

**In-Office Electrodiagnostics - What Can It Do For You**

9:45 AM – 10:45 AM 1 Hour

Nate Lighthizer, OD

Electrodiagnostics are now available for in-office use. They are quick and not complicated in this new format. Many clinical entities can be tested and early diagnosis is now possible. Early detection of diabetic retinopathy can be determined with ERG. Amblyopia and malingering can be discovered with VEP. Decreased vision due to intracranial tumors and trauma is possible with VEP. Discovery of intrapapillary drusen can be made with VEP. Lastly, the early discovery of glaucoma is possible and even cases of patients on treatment that don't have the disease can be made with VEP.

23C2

**The Greatest Anterior Segment Disease and Medical Management of Contact Lens Complications Course - Ever!**

9:45 AM – 11:45 AM 2 Hours

Jack Schaeffer, OD; Charlie Ficco, OD; Marc Bloomenstein, OD

World renowned experts in anterior segment eye disease and contact lenses will present a unique program to enhance your clinical diagnostic and treatment abilities. The new medical vision correction options will also bring new complications. Today we will present the medical management strategies for the complications so the eyecare practitioner will feel comfortable when they present in your office.

23C3

**Optimal Management of Meibomian Gland Disease and Ocular Surface Disease**

9:45 AM – 10:45 AM

1 Hour

John Lahr, OD

Meibomian Gland Disease (MGD) and Ocular Surface Disease (OSD) are the most common pathologies presenting in primary eye care practices today and will continue into the future. Learn the keys to diagnosing the level of severity of the diseases and how to manage both short and long-term. Presented is a straightforward treatment model that will provide the best outcomes for your patients.

23C5

**The Surgical Management of Presbyopia**

9:45 AM – 10:45 AM

1 Hour

William Tullo, OD; Jim Owen, OD

This course will provide the practicing optometrist a detailed understanding of current and future options for the surgical correction of presbyopia. You will learn about accommodative, adaptive and multifocal IOL's, scleral expansion, corneal inlays, corneal femtosecond intrastromal ablations and femtosecond crystalline lens softening. Patient selection, safety and efficacy of each option will be highlighted.

23C7

**Macular Carotenoids and Cognitive and Visual Function Across the Lifespan**

9:45 AM – 10:45 AM

1 Hour

Lisa Renzi Hammond

In this course, you will learn how dietary behaviors impact overall ocular and neurological health. Specifically, you will discover the ways in which dietary behaviors, such as consuming carotenoid-rich foods and supplements, can reduce risk for ocular disease and improve visual function, across the lifespan. Given the fact that the retina is the best model tissue that exists for understanding the brain, you will also explore how dietary carotenoids also influence cognition and brain health.

23L1

**Take the Contact Lens Challenge – Fit the Unusual Eye**

9:45 AM – 11:45 AM

2 Hours

Louise Sclafani, OD; S. Barry Eiden, 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.

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"!

24C1

**New Technology Rapid Fire Session**

11:00 AM – 12:00 PM

1 Hour

Paul Karpecki, OD; David Geffen, OD

Innovation in corneal research and technology offer a wealth of new possibilities. From point-of-care diagnostics to improved drugs and delivery systems, the ability to more effectively manage patients today and in the future makes this an exciting time for optometry. In this one-hour course, optometrists will get a better understanding of the growing list of options that are improving eye care and that hold even greater potential for the future.

24C3

**The Tech, Tips and Tools You Need to be Efficient and Effective**

11:00 AM – 12:00 PM

1 Hour

Scot Morris, OD

Tremendous advances in technology can help you improve the efficiency of your practice. Don't miss this course as we talk about how you can incorporate some of these technologies in to your business and allow you to work more efficiently and how that transfers to your bottom line.

24C5

**Managing the Psychology of Dry Eye Disease - The Role of Diagnostics**

11:00 AM – 12:00 PM

1 Hour

Richard Adler, MD

While the traditional challenges of Dry Eye Disease (DED) treatment and management have been well-described, one of the most widely-appreciated, yet under-discussed aspects of DED concerns the psychological features of the DED patient. In this course, Dr. Adler reviews the traditional challenges of DED and then investigates the role of anxiety in this disorder. Dr. Adler then describes the potential value of diagnostics in DED to not only better manage the disease, but the mind as well.

24C6

**Color Vision in Health and Disease**

11:00 AM – 12:00 PM

1 Hour

Craig Thomas, OD

You will learn about the anatomy and physiology of human color vision. Emphasis is placed on acquired color vision defects, color vision examination techniques, interpretation of test results, and medical decision-making.

24C7

**New Directions in Glaucoma Diagnostics and Treatments**

11:00 AM – 12:00 PM

1 Hour

Ben Gaddie, OD

This course will review the newest technology related to glaucoma diagnosis as well as an update in managing clinical glaucoma.

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 Leadership Center 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.

20C1

**Amniotic Membranes in the Optometric Practice**

12:30 PM – 2:30 PM

2 Hours

Walter Whitley, OD; Douglas Devries, OD

This two hour lecture/wetlab is designed to give the clinician hands-on experience in placing amniotic membranes. Indications for utilization, proper coding and billing will also be discussed.

20C3

**Injections Workshop**

12:30 PM – 2:30 PM

2 Hours

Nate Lighthizer, OD, FAAO

This workshop will review the basic injection techniques that are commonly performed in the optometric office setting. Techniques will include subcutaneous, subconjunctival, intralesional and intramuscular injections will be covered. Venipuncture for fluorescein angiography will also be discussed. The indications, contraindications, possible complications and the management for each injection technique will be reviewed. Discussion will include a brief review of proper aseptic technique.

25B3

**Success Secrets of High Producing ODs**

2:45 PM – 4:45 PM

2 Hours

Jerry Hayes, OD

Based on in depth financial analysis their and recent consulting work with over 300 practices grossing an average of \$1.2 Million, the speakers will offer some surprising insights into the common traits of high producing ODs and how you can become one.

25B4

**How to Become the Destination Location**

2:45 PM – 4:45 PM

2 Hours

Rebecca Johnson; Jay S. 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.

25B6

**Mastering the Art of Utilizing Scribes, Cross Training and Delegation**

2:45 PM – 4:45 PM

2 Hours

Neil Gailmard, OD

This course will present the advantages of utilizing chairside assistants in the eye care practice, such as increased efficiency, improved patient service and higher optical and contact lens sales. Practical aspects of scribing will be covered, such as patient flow, staff training, entering data into EMR programs and more. The concept of a super-tech is introduced, which allows the scribe to function as an optician.

25C1

**The Optometrist's Guide to Cataract and Refractive Surgery**

2:45 PM – 4:45 PM

2 Hours

Marc Bloomenstein, OD

The lines between refractive surgery and cataract surgery have blurred to the point of almost unrecognizability. Patients are expecting great quality of vision regardless of the nature of their visual disorder. This course will provide a safe road map to navigate between both the elective refractive procedure and the medically necessary cataract surgery. Discussion will be center around new technology that bridges both procedures.

25C2

**Getting The Most Out of Your OCT For Glaucoma and Retina: Diagnosis, Management and Progression**

2:45 PM – 4:45 PM

2 Hours

Ben Gaddie, OD; Mark Dunbar, OD; Dave Kading, OD

Optical Coherence Tomography is an exciting imaging technology that has revolutionized our understanding of macular disease and has emerged as an important tool in the management of glaucoma and scleral lens fitting. This lecture will provide a nuts and bolts approach using cases to understanding and interpret the OCT for retina, glaucoma and contact lens fitting.

25C3

**Glaucoma for the “Every Day” Optometrist**

2:45 PM – 4:45 PM

2 Hours

Eric Schmidt, OD

Glaucoma is a rapidly advancing field within optometry. The advances made can be difficult to keep up with. This course will present the practicing optometrist research data that translates into practical applications that the doctor can use daily in patient care. Information will be provided that will allow the attendee to remain on the cutting edge in practical glaucoma care.

25C4

**Primary Care: The Female Perspective**

2:45 PM – 3:45 PM

1 Hour

April Jasper, OD

In this course, taught by two female OD's, we will analyze the challenges in our current and future healthcare environment that are specific to women. We will review disease cases specific to female patients and analyze how to address the unique challenges that arise. Efficiencies in the examination process will be evaluated including how to implement these efficiencies to improve patient care in the cases discussed for better outcomes of the disease.

25C5

**Corneal Crosslinking Guide of the Optometrist**

2:45 PM – 4:45 PM

2 Hours

William Tullo, OD; Clark Chang, OD

This course will provide you the essential clinical knowledge of the benefits of Corneal Crosslinking for your patients. Details involving the early diagnosis of ectasia and proper patient selection will be discussed. Different methods of CXL including traditional epi-off, transepithelial and combined modalities including topography guided PRK and Intacs will be highlighted. Detailed co-management and perioperative care will also be included.

25C6

**Myopia: Current Theories of Etiology and Treatment**

2:45 PM – 4:45 PM

2 Hours

Jeffrey Cooper, OD

Myopia is the most common condition treated by Optometrists and Ophthalmologists and is the sixth leading cause of blindness. It is increasing at a dramatic rate. This course will review the current theories of etiology and treatment, i.e. bifocals, progressive glasses, under-correction, ortho-keratology, multifocal contact lenses, atropine 1% and lower concentrations. Case presentation will be provided to provide the clinician a viable method for myopia control.

25C7

**Greatest Ocular Surface Disease Course – Ever**

2:45 PM – 4:45 PM

2 Hours

Douglas Devries, OD; Whitney Hauser, OD; Jack Schaeffer, OD

This two-hour course will provide the latest updates in the diagnosis and treatment of ocular surface disease by clinicians who practice full scope treatment of ocular surface disease patients within their specialty dry eye clinics. Various methods of achieving compliance during treatment of OSD patients will also be taught.

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 workshop is for participants with limited experience fitting scleral lenses. Instructors from the Scleral Lens Education Society provide hands on fitting experience using scleral lenses from various companies. Participants are taught insertion, removal and solutions specific to scleral lenses.

26B2

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

5:00 PM – 6:00 PM

1 Hour

Rebecca Johnson

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 know 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 Wining

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!

26C1

**Low Vision Rehabilitation in the Private Optometric Practice: A Successful Business Model**

5:00 PM – 6:00 PM

1 Hour

Lynne Noon, OD

The lecture will discuss the best practice for rehabilitation of the visually impaired person. There will be a review of the vision aids and tools that are needed for a client with decreased central vision, decreased peripheral vision, poor contrast sensitivity and glare control. The advantages and disadvantages of custom and pre-made low vision aids will be reviewed.

26C2

**When It Isn't Amblyopia**

5:00 PM – 6:00 PM

1 Hour

Sherry Bass, OD

Ocular and neurological disease can masquerade as amblyopia. This course reviews the basic diagnostic criteria for amblyopia and presents cases of retinal and visual pathway disease that have been misdiagnosed as functional vision loss, sometimes with dire consequences.

26C3

**PTEye: Retina 30min Countdown**

5:00 PM – 5:30 PM

0.5 Hours

Diana Shechtman, OD

This lecture will cover an array of retinal diseases. A quick case presentation format will be used to introduce the case with a short discussion of clinical pearls used to help diagnosis and manage such cases.

26C4

**Integrating the Optometric Practice Embracing Disruptive Technology**

4:00 PM – 5:00 PM

1 Hour

Kenneth Eakland, OD

The delivery of eye care is under dramatic change. New rules, regulation and technology both from within and beyond traditional health care systems are transforming the delivery of care. This course has been developed to provide clinically relevant and detailed information on current change drivers within all of health care and how these can and will transform eye care delivery. Understanding the potential opportunities, threats, and by embracing the new ways of delivery of care can make the difference from just surviving to thriving in tomorrow's health care system. Attendees will learn the potential advantages by embracing changes in technology and new delivery systems emerging in American health care. The presentation will provide a step-by-step sequence on how to analyze the practice needs, evaluate the technology currently available, and develop a plan to implement support technology into their optometric practice.

26C5

**Amniotic Membranes: Why, How and When?**

5:00 PM – 5:30 PM

0.5 Hours

William Marcolini, OD

The use of amniotic membranes in optometry is growing. Learn the basics of the reasons of why they are used, which patients to use them on and practical pearls of how you can implement these into your practice.

26C6

**The Pain Game**

5:00 PM – 6:00 PM

1 Hour

Derek Cunningham, OD

The Pain Game- exploring ocular pain and inflammation. This course will review basic understandings of ocular pain and inflammation. Topical therapies of on and off-label medications will be reviewed for primary care and post-surgical applications.

26C7

**Interpreting Visual Fields**

5:00 PM – 6:00 PM

1 Hour

Murray Fingeret, OD

Visual field testing is an integral test used for diagnosing and managing glaucoma. This course will review methods for analyzing the field including how to assess whether the test is reliable. The criterion for what constitutes a real defect as well as signs of progression will be discussed.

26L1

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

5:00 PM – 5:30 PM

0.5 Hours

Franck Leveiller

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.

27C4

**Advanced Refractive Analysis, Beyond Just Better One or Two... Incorporation of Wavefront Technology in Vision Analysis**

5:15 PM – 6:15 PM

1 Hour

S. Barry Eiden, OD

Vision challenges often are left unanswered following a careful traditional refractive analysis which often leaves the eye care practitioner unable to explain – no less address the vision deficits our patients experience. High order aberrations can significantly contribute to visual dysfunction. Today technologies exist that can not only detect the presence of significantly elevated high order aberrations, but that can guide the ECP towards the most effective treatment for the individual patient. This course will review the basics of wave front analysis, measurement technologies and how to apply this information in order to provide your patients with the most optimized vision possible.

30C7

**Current Trends in Medical Management**

7:30 AM – 9:30 AM

2 Hours

Ron Melton, OD; Randall Thomas, OD

Treatment strategies and therapeutic agents continually change for a variety of ocular conditions. This course will address some of the advances in therapeutic options for acute and chronic ocular

diseases. Relevant drug classes, latest information, clinical application of pharmaceuticals are reviewed.

31B2

**Debt Management for Young Professionals**

8:30 AM – 9:30 AM

1 Hour

George Spiropoulos

This course is intended to give you the information and tools you need to help you manage your debt in the first 1-5 years of being in the workforce. By taking a financial planning approach to debt management, we will walk you through creating your personal balance sheet to review all your assets and liabilities, and assist you in laying out a student loan schedule. This allow you to understand the priority of where extra monthly cash flow should go and how to handle dueling financial goals.

31B3

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

8:30 AM – 9:30 AM

1 Hour

Mark Wright, OD

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 S. 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.

31C1

**Low Vision Case Studies: Treating the Common and Not So Common**

8:30 AM – 9:30 AM

1 Hour

Thomas Porter, OD

In this course we will review the 3 simple variables used to approach the management of almost all low vision problems. You will learn how one applies these variables by reviewing actual cases with the most commonly (and uncommon) causes of low vision. Critical history questions, exam techniques, formulating treatment plans and implementing those plans will be reviewed in depth along with economic considerations.

31C2

**The Strain of Digital Eyestrain On Our Patients And Us**

8:30 AM – 9:30 AM

1 Hour

Pete Kollbaum, OD

This course will review current understanding (and lack of understanding!) of eyestrain and associated potentially synonymous terms, especially related to the use of digital devices, and specifically highlighting potentially unknown information surrounding its prevalence, association, etiology, and treatment.

31C3

**Creating a 5-Star Patient Experience**

8:30 AM – 9:30 AM

1 Hour

Mark Schaeffer, OD; Jack Schaeffer, OD

The 5-star patient experience is an attainable way to create brand loyalty to your practice. Are you struggling to find a way to provide a higher level of service to your patients on a daily basis? In this course, we will go into new technologies that allow a more efficient exam, happier patients, and a WOW factor that translates into more brand loyalty.

31C4

**State of the Art Diagnosis and Management of Keratoconus and Keratectasia - there has been a great paradigm shift!**

8:30 AM – 11:30 AM

3 Hours

S. Barry Eiden, OD; William Tullo, OD

It has become more important than ever to make an early diagnosis of keratoconus as early as possible based on new treatment modalities that can halt the progression of the disease. This has created a dramatic paradigm shift in our approach to the management of keratoconus and related

diseases. The presenters will share their extensive experiences in the most current understanding of these diseases, their early diagnosis through both standard and highly advanced technologies and the full array of treatment options including corneal cross linking, intra-corneal ring segments (Intacs), contact lens treatment options and new developments in keratoplasty surgical procedures. We now realize that keratoconus is far more prevalent in our patient populations than ever thought before. Join us to gain a clearer understanding of how to detect and manage keratoconus and bring this paradigm shift to your practice!

31C5

**Blepharitis, MGD and Ocular Surface Disease**

8:30 AM – 9:30 AM

1 Hour

Ben Gaddie, OD

This course will review the common clinical picture of blepharitis and meibomian gland disease. New consensus based guidelines will be used to formulate treatment and management strategies as the condition impacts ocular surface health and comfort.

31C6

**Advances in OCT**

8:30 AM – 9:30 AM

1 Hour

Murray Fingeret, OD

This course will discuss the role of OCT in glaucoma diagnosis and management. A method to evaluate printouts will be described and artifacts associated with testing will be presented. The role of OCT in monitoring glaucoma over time will also be discussed.

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.

32B1

**Lessons from Silicon Valley**

9:45 AM – 11:45 AM

2 Hours

Christine Chan, OD; 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!

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 Face book, 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.

32B5

**How to Survive a Medical Audit**

9:45 AM – 11:45 AM

2 Hours

Richard Soden, OD

Health care fraud and abuse is on the rise. The Office of the Inspector General (OIG) has targeted that the ophthalmological codes be reviewed this coming year. This course will provide an overview of the necessary documentation requirements you must adhere to support your billing and coding. Common auditing principles will be reviewed.

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.

32C1

**Lightning Rounds in Glaucoma**

9:45 AM – 11:45 AM

2 Hours

Douglas Devries, OD; Louise Sclafani, OD; Charlie Ficco, OD; Kirk Smick, OD; Eric Schmidt, OD

A two-hour fast paced lecture on the latest as well as future treatment modalities in glaucoma. Each topic will be presented by one of five lecturers in 15 minutes segments followed by 5 additional minutes for questions. This lecture will cover therapeutic medications, laser treatments as well as additional surgical treatments for chronic open angle glaucoma.

32C2

**Lightning Rounds in Anterior Segment Disease**

9:45 AM – 11:45 AM

2 Hours

Douglas Devries, OD; Louise Sclafani, OD; Charlie Ficco, OD; Kirk Smick, OD; Eric Schmidt, OD

A two-hour fast paced lecture on the latest as well as future treatment modalities in anterior disorders. Each topic will be presented by one of five lecturers in 15 minutes segments followed by 5 additional minutes for questions. This lecture will cover advances in diagnosis and treatment ocular surface disease. The lecturers will cover advances in cataract surgery that all optometric clinicians should be aware of.

32C3

**New Technologies in Glaucoma Management: From ERG to OCT**

9:45 AM – 11:45 AM

2 Hours

Ben Gaddie, OD; Murray Fingeret, OD

Sophisticated imaging devices have become available that objectively analyze the optic nerve and nerve fiber layer. Visual field devices that are combined with retinal photography are also available that allow an automated structure-function analysis. And electrodiagnostic testing is also commercially available that also functional vision to be assessed objectively. This course will review the different types of instruments, how they work and illustrate their importance in the diagnosis and management of glaucoma.

32C5

**The Greatest Posterior Segment Disease Course - Ever!**

9:45 AM – 11:45 AM

2 Hours

Mark Dunbar, OD; Jay Haynie, OD; Diana Shechtman, OD

This is not another boring poster segment disease course, but instead, the most exciting and interesting retinal disease talk you will ever experience. Interesting cases and a smorgasbord of retinal disease topics will be covered in this fun-filled, action packed lecture delivered by a dynamic faculty (It is possible that this course description overstates the true quality and intent of this lecture).

32C6

**Clinical Case Management in the ICD-10 Era: Anterior Segment**

9:45 AM – 11:45 AM

2 Hours

John Rumpakis, OD; Jack Schaeffer, OD; Marc Bloomenstein, OD

Using case examples, lecturers will present common and not so common disease states seen within optometric practice and ways we can improve our clinical skills from the case history, examination to medical decision making. Additionally, this course will discuss how clinical care will be impacted by ICD-10.

32C7

**Reducing the Pressure on Glaucoma Decision Making**

9:45 AM – 11:45 AM

2 Hours

Randall Thomas, OD; Ron Melton, OD

This course will provide a comprehensive review and update on managing patients with glaucoma.

32L1

**GPS Guide To Advanced Scleral Lens Fitting**

9:45 AM – 11:45 AM

2 Hours

Clark Chang, OD; Melissa Barnett, 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

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

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.

We'll discuss:

- Where does your office/practice/store start? Beyond your reception desk, beyond your website...how and where do you make your best, first impression?
- The first WOW! Your visitors come to you as patients but want to leave you as satisfied shoppers. Put your patients in a shopper frame of mind.
- On your left! How do you accommodate the leisurely browser and the convenience shopper in the same space?
- How we shop: Identifying the must-have 5 steps that lead to purchasing. Does your space have the right tools in the right place for shoppers to shop and ultimately buy....from YOU?

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.

33B3

**Preparing for ICD-10 From Coding to Record Keeping**

2:45 PM – 4:45 PM

2 Hours

Richard Soden, OD

ICD -10 is the new coding system for healthcare providers. Optometrists will need to understand this system in order to file claim with insurance carriers. This new system is very different from ICD-9. Record documentation will need to support the ICD-10 that is chosen by the Optometrist. This course will teach the optometrist basic ICD-10 coding principles and will highlight the differences between ICD-9 and ICD-10. Specific case examples will be utilized to emphasize the proper use of ICD-10.

33B5

**The Consumer Connection**

2:45 PM – 4:45 PM

2 Hours

Jay S. Binkowitz; Mark Wright, OD

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.

33C1

**So Now What? Decision Making in Retinal Disease**

2:45 PM – 4:45 PM

2 Hours

Diana Shechtman, OD; Jay Haynie, OD

Have you ever diagnosed a retinal condition & find yourself challenged by the management (should I refer, is this an emergency, what are the tx options, should I order blood test?)? You basically find yourself asking .... so now WHAT? This course will use rapid fire case presentation & provide guidance regarding proper referral, controversies facing the management & how to effectively co-manage various retinal diseases. At the conclusion of this course you will gain the knowledge to be able to convert the "NOW WHAT" to "THIS IS WHAT."

33C2

**Glaucoma Pearls and Grand Rounds**

2:45 PM – 4:45 PM

2 Hours

Ben Gaddie, OD; Richard Madonna; Murray Fingeret, OD

Using a series of glaucoma cases, important issues related to how glaucoma presents and is managed will be discussed. Pearls related to the diagnosis and recognition of progression will be discussed along with the role of OCT in glaucoma diagnosis and management.

33C3

**Diabetes Treatment and Management**

2:45 PM – 4:45 PM

2 Hours

Steven Ferrucci, OD

This course provides an introduction to diabetes, with an emphasis on Type 2. The systemic medications used for the treatment of diabetes are reviewed, with some of the common side effects. The second part of the lecture is a review of the newest diabetic retinopathy classification and management recommendations.

33C4

**Refractive Surgery Problem Solving**

2:45 PM – 4:45 PM

2 Hours

William Tullo, OD; Derek Van Veen, OD

Today's various refractive surgery options will be discussed including LASIK, PRK, IOLs, phakic IOLs, premium IOLs, and corneal inlays. We will dive into patient selection, patient management, clinical pearls, and future refractive technologies. Audience participation and interaction will be encouraged.

33C5

**Clinical Case Management in the ICD-10 Era: Posterior Segment**

2:45 PM – 4:45 PM

2 Hours

John Rumpakis, OD; Mark Dunbar, OD

Using case examples, lecturers will present common and not so common posterior segment disease states seen within optometric practice and ways we can improve our clinical skills from the case history, examination to medical decision making. Additionally, this course will discuss how clinical care will be impacted by ICD-10.

33C6

**Vision and Eye Care in War: The Conflicts in Iraq and Afghanistan**

2:45 PM – 4:45 PM

2 Hours

Aaron Tarbett

The conflicts in Iraq and Afghanistan are two of America's longest running wars. This course covers ocular and vision related injuries sustained on these battlefields and their management. It will also touch on battlefield adaptations that enhanced eye and vision care in theater.

33C7

**Cataract Comanagement**

2:45 PM – 4:45 PM

2 Hours

Derek Cunningham, OD

This course will center around the optometrist responsibilities in and around cataract surgery. Identification and screening for surgical risk factors will lead the lecture into what can be done to limit or eliminate these factors before surgery. Increased patient expectations and advanced technology lead to smaller margins of error that optometrist can help control. Post operative complication management and treatment protocols will be detailed. Proper patient communication will be highlighted throughout the spectrum of surgical outcomes.

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

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

Jay S. 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!

34C1

**My Top 5 Pediatric Eye Diseases**

5:00 PM – 6:00 PM

1 Hour

Zach McCarthy

Examining and diagnosing the pediatric patient can be challenging, yet rewarding. This course will review the top five most common pediatric eye diseases. Emphasis will be placed on management and differential diagnosis. In addition, appropriate formulations and dosing of systemic medications for pediatrics will be covered.

34C2

**Is This Acanthamoeba?**

5:00 PM – 5:30 PM

0.5 Hours

Mark Dunbar, OD

This rapid-fire Crash Course will show 2 interesting patients with red eyes and atypical corneal findings. Could it be Acanthamoeba?

34C3

**Optometry at the White House**

5:00 PM – 6:00 PM

1 Hour

Aaron Tarbett, OD

This course covers my time as the White House optometrist (2006-2015), with insights into optometric care at the White House Medical Unit, as well as ocular conditions of past Presidents of the United States.

34C4

**Co-management of Femto-Cataract Surgery**

5:00 PM – 6:00 PM

1 Hour

William Tullo, OD, Jim Owen, OD

This course will provide you the evidence based data needed to determine how your patients may benefit from femto-cataract surgery. A step-by-step outline to the patient selection, co-management and perioperative care will be discussed in detail. Current and future technology will be highlighted throughout this presentation.

34C5

**My Mid Life Crisis and the Ganglion Cell Complex**

5:00 PM – 5:30 PM

0.5 Hours

Jay Haynie, OD

Technology has given us an opportunity to look at the retinal ganglion cell inner plexiform complex as we have never been able to in the past. In some cases this can be very helpful. When the clinical examination and patient symptoms do not correlate it may be helpful to look at the GCC information.

34C6

**The Top 2 Craziest Ocular Emergencies That Happened to College Students**

5:00 PM – 5:30 PM

0.5 Hours

Christine Chan, OD

Remember those wild college days when you felt invincible like nothing bad could ever happen to you? Listen to shocking true stories of ocular trauma experienced by college students and find out what happens when you are having too much fun.

34C7

**Choosing the Right Agent in the Therapeutic Management of Ocular Disease**

5:00 PM – 6:00 PM

1 Hour

Derek Cunningham, OD

The causes of ocular dysfunction are often multifactorial and rarely self contained. Inflammation, infection and degeneration are often variable concerns in any diseased eye. Differential diagnosis of co-morbidities will serve as a basis to choose the most effective treatment in presenting patients.

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.

41C1

**Amblyopia - What the Studies Show**

8:30 AM – 9:30 AM

1 Hour

Zach McCarthy

Our understanding of amblyopia and its treatment has changed greatly over the past decade, thanks to landmark clinical studies. This course will review these Amblyopia Treatment Studies (ATS) and simplify the findings into useful clinical protocols.

41C2

**Retina and OCT Grand Rounds**

8:30 AM – 10:30 AM

2 Hours

Stsven Ferrucci, OD

You will become familiar with some of the basic principles of retinal OCT's as well as uses examples to help illustrate OCT findings associated with certain clinical entities. Clinical pearls for the various diseases are stressed, as well as new treatment options and recommended management.

41C3

**Enhance Your Understanding of Neuro Imaging**

8:30 AM – 9:30 AM

1 Hour

Kelly Malloy, OD

This course highlights neuro-imaging studies ordered in neuro-ophthalmic disease practice. CT/CTA, MRI/MRA/MRV, and Angiography are discussed in terms of indications/contraindication/ordering protocol. Multiple images contrast normal and abnormal studies. A case-based approach aids clinical application, and tests radiologic interpretation skills.

41C4

**Prevention of Medical Errors**

8:30 AM – 10:30 AM

2 Hours

Joseph Sowka, OD

The Institute of Medicine identified the epidemic of preventable medical errors. This course educates optometrists on how to reduce the risk of medical errors and improve patient safety. Preventable errors are examined through a discussion of optometric malpractice claims. This course also satisfies the Florida State Board requirement for prevention of medical errors for initial licensure and biennial renewal. Clinical Discussions in Glaucoma: The goal of this presentation is to provide necessary understanding of various types of glaucoma that are encountered in clinical practice. There are different types of primary and secondary glaucomas, ocular hypertension, as well as angle closure glaucomas that are encountered in clinical practice. This course presents several cases of each in an interactive, discussion format designed to enhance clinical understanding of each type of glaucoma encountered.

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.

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.

42C1

**Managing the Glaucoma Suspect**

9:45 AM – 11:45 AM

2 Hours

Richard Madonna

This course examines the difficulties in caring for the glaucoma suspect and offers ideas on how to best manage these patients. Risk factor analysis, structural and functional assessment of the optic nerve, and use of new technologies is discussed. Clinically useful information that can be immediately used in patient care is provided.

42C3

**Antibiotics: Optometry and the Coming Armageddon**

9:45 AM – 10:45 AM

1 Hour

Arthur Epstein, OD

In use since for less than a century, antibiotics have changed the way we live and the way health care providers practice. This course explores current trends in infectious disease with focus on antibiotic therapy in eye care.

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.

43C2

**Ocular Allergy: New Perspectives on a Growing Problem**

11:00 AM – 12:00 PM

1 Hour

Arthur Epstein, OD

Ocular allergy is among the most prevalent conditions encountered in optometric practice. More complex than it might seem, this course reviews modern thinking regarding ocular allergy and explores effective strategies for managing this common disorder.

43C3

**Neuro Ophthalmic Manifestations of Cancer**

11:00 AM – 12:00 PM

1 Hour

Kelly Malloy, OD

You will learn the variety of ways cancer can cause neuro-ophthalmic disorders. Through a case-based approach, you will see clinical presentations of varied primary brain cancers and metastases, both in the setting of known cancer as well as the initial manifestation. You can be involved in discussion regarding work-up, diagnosis, treatment and appropriate referral.

43C4

**Unborn at Risk? Topical Medications for the Eye**

11:00 AM – 12:00 PM

1 Hour

Milton Hom, OD

Prescribing for the pregnant patient has never been easy. For many of the topical drugs we prescribe, a judgement call needs to be made for two people: the patient and the unborn child. We will look at a sampling of recent drugs and their effects on pregnancy and lactation.

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.

44C1

**Advanced Diagnosis and Management of Ocular Surface Disease and Tear Dysfunction**

1:45 PM – 3:45 PM

2 Hours

Arthur Epstein, OD

Our understanding of the ocular surface has evolved dramatically over the past few years. We increasingly recognize the complexity and interaction of ocular surface elements and tear structure. Combining an evidence-based approach with extensive use of video animation, this course integrates novel concepts into a unified perspective of the ocular surface environment with direct clinical application.

44C2

**Clinical Discussions in Glaucoma**

1:45 PM – 3:45 PM

2 Hours

Joseph Sowka, OD

This course is designed to bring you the latest information regarding diagnosis and management of glaucoma in a case-based format. We have included in this handout some key points regarding these clinical entities to satisfy the course requirements.

44C3

**Neuro Ophthalmic Manifestations of Stroke**

1:45 PM – 3:45 PM

2 Hours

Kelly Malloy, OD

Experience a case-based approach focusing on the prevention, diagnosis, and treatment of stroke. Gain insight through cases which revolve around presenting features of stroke and causes of stroke in younger versus older patients. You will learn that emphasis is placed on detailed history and exam techniques, as well as proper work-up and referral.

44C4

**Orals Meds for the Rest of Us**

1:45 PM – 3:45 PM

2 Hours

William Marcolini, OD

This course is for you--the primary care optometrist! With the ability to treat infection, inflammation, glaucoma and manage pain orally, optometrists are faced with ever increasing responsibilities. This course simplifies the approach to managing patients with oral medications. This course will make you think as well as provide practical management tips as well as alternate possibilities to medications when an allergy or contraindication is present.

44C5

**The Essence of Fundus Autofluorescence in Hereditary and Acquired Retinal Disease**

1:45 PM – 3:45 PM

2 Hours

Sherry Bass, OD

Fundus autofluorescence is a novel imaging technology that provides valuable information about structural integrity of the retina in many retinal diseases. This course reviews the principles of fundus autofluorescence and its applications in detection and management of many hereditary and acquired retinal diseases. A variety of stimulating examples of these retinal diseases is presented that demonstrate abnormalities that are not obvious on standard fundus photography, how these abnormalities differentiate inherited from acquired retinal disease and how these diseases may be monitored over time.

45B2

**Building Loyalty With Internal Marketing**

4:00 PM – 5:00 PM

1 Hour

Michael Rothschild, OD

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.

45C1

**What Not to Refer**

4:00 PM – 5:00 PM

1 Hour

Zach McCarthy

This course will examine a variety of cases commonly referred to secondary care facilities. Each case will emphasize the handling of challenging cases in primary care settings and how optometrists can practice to their full scope.

45C3

**The Differential Diagnosis of Optic Nerve Edema**

4:00 PM – 5:00 PM

1 Hour

William Marcolini, OD

The clinical finding of an edematous optic nerve can be a scary proposition. This course reviews the mechanisms of optic nerve edema and uses case presentations to teach how to ensure the correct diagnosis. Specific topics include optic neuritis, pseudotumor cerebri, anterior ischemic optic neuropathy, optic nerve drusen, papilledema and others.

MS33

**Emerging Utility of Ultra-widefield Imaging in Clinical Practice**

1:00 PM – 2:00 PM

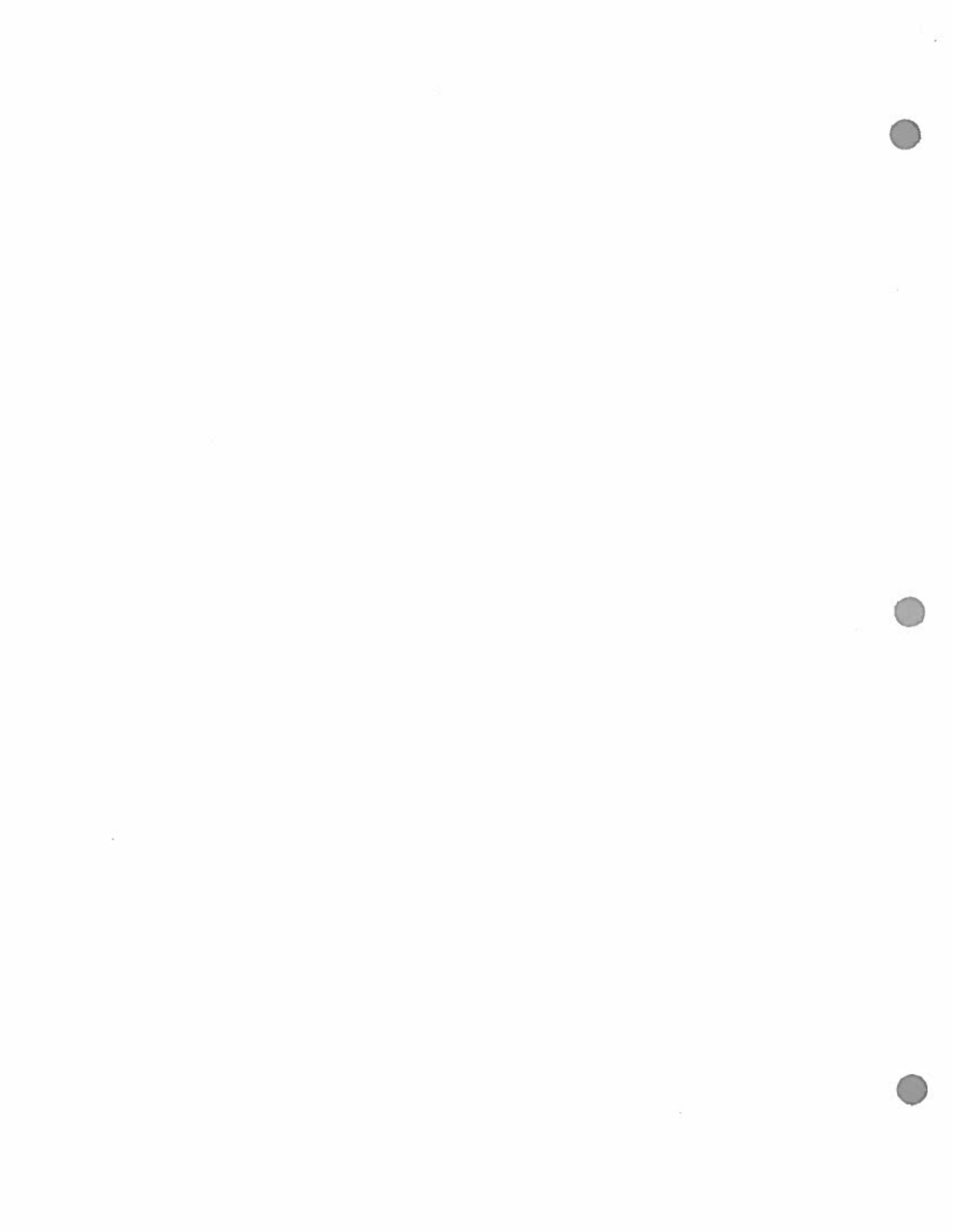
1 Hour

Rishi Singh, MD

Ultra-widefield imaging is rapidly becoming a valued part of standard ophthalmic care as the role of pathologic changes to the retinal periphery in a variety of diseases are becoming better understood. Dr Rishi Singh, expert in the field of ophthalmology and retinal diseases from the

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Cleveland Clinic will present evidence-based perspectives and share his experiences on when to use ultra-widefield imaging, what clinically relevant changes can be detected in the periphery, and how these observations affect patient care.



**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.

**Richard Adler, MD, FACS**

Dr. Richard A. Adler is Director of Ophthalmic Services at the Belecara Premier Multispecialty Group in Baltimore, Maryland. Dr. Adler completed his residency and Cornea fellowship training at the Wilmer Eye Institute where he remains on faculty as Assistant Professor of Ophthalmology. Dr. Adler lectures weekly on the national level on topics related to Dry Eye Disease and presented original content on Dry Eye Disease at this year's Millennial Eye Meeting, Dry Eye Summit, and the World Cornea Congress.

**Kathleen Albrecht, MD**

Dr. Albrecht is director of oculoplastic surgery and aesthetic eye care services at North Suburban Vision Consultants. She is board certified and fellowship trained in ophthalmic plastic and ocular reconstructive surgery. She has hospital privileges and staff appointments at Illinois Masonic Hospital in Chicago, Alexian Brothers in Elk Grove Village and at St. Mary of Nazareth Hospital in Chicago. Dr. Albrecht is a member of the American Academy of Ophthalmology.

Dr. Albrecht is a graduate of Georgetown University Medical School in Washington D.C. She completed her internship at Northwestern University and received her specialty residency training at the prestigious Doheny Eye Institute in L.A. which is rated in the top ten Ophthalmology residency programs in the U.S. Dr. Albrecht then completed a two year private fellowship in the highly sub-specialized field of Ophthalmic Plastic and Orbital Surgery.

**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.

**Sherry Bass, OD**

Dr. Sherry J. Bass is a Distinguished Teaching Professor at the SUNY State College of Optometry in New York City where she has served on the faculty for 28 years. She is actively involved in clinical teaching and patient care in the Retina Clinic, the Glaucoma Institute of the Ocular Disease and Special Testing Clinic and the Corneal and Refractive Surgery Clinic as well. In addition, Dr. Bass provides special electrodiagnostic testing services for the diagnosis and management of unique hereditary and acquired retinal diseases. She has served as the Residency Supervisor for the Residency in Ocular Disease at SUNY since 1998. Dr. Bass has authored over 200 publications and is a popular lecturer of national and international acclaim in anterior and posterior segment disease, special testing procedures, ocular imaging and perimetry. In addition, Dr. Bass is actively involved in research and is a regular presenter at the American Academy of Optometry Scientific Meetings and at meetings of the Association for Research in Vision and Ophthalmology. She is as a former member and Chair of the New York State Board for Optometry and maintains a part-time private practice in Woodmere, New York.

**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.

**Mile Brujic, OD**

Mile Brujic, O.D. is a partner of Premier Vision Group, a successful four location optometric practice in Northwest Ohio. He practices full scope optometry with an emphasis on ocular disease management of the anterior segment, contact lenses and glaucoma. He is active at all levels of organized optometry. Dr. Brujic has published over 150 articles and has given over 750 lectures, both nationally and internationally on contemporary topics in eye care.

**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.

**Allen Cohen, OD**

Dr. Cohen brings to this program a wealth of clinical experience for the management of the visual consequences of Acquired Brain Injury. He will present information that he has accumulated during the 40 plus years of his unique career. As Chief of Optometry Service at the Northport VA Medical Center for over 25 years, he treated numerous injured soldiers. During his 40 plus years in private practice, he specialized in neuro-optometric rehabilitation services for patients with visual problems as a result of ABI and other neurological disorders. Presently, he is a clinical professor of optometry and the supervisor of Neuro-optometric Rehabilitation Residency at SUNY Optometry. Dr Cohen devotes his clinical time in the Raymond Greenwald Rehabilitation Center at SUNY Optometry, where he provides neuro-optometric rehabilitation to patients with ABI, vestibular and balance disorders and visual problems associated with neurological insults.

Dr. Cohen is the optometric developer of the NeuroVision Rehabilitator (NVR) program for treating visual consequences of acquired brain injury.

Dr. Cohen has published in numerous professional journals, and has contributed chapters on this subject in 5 text books.

**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.

**Derek Cunningham, OD**

Dr. Cunningham is the Director of Optometry at Dell Laser Consultants in Austin, Texas. His current research involves retinal drug treatments, glaucoma surgery techniques, and refractive surgery. Previously Dr. Cunningham was the resident education supervisor for the Division of Ophthalmology at Texas Tech School of Medicine at El Paso.

**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 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 Gennaro, 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.

**Michael Della Pesca, ABOM**

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.

**Douglas Devries, OD**

Dr. Devries has a degree in financial management from the University of Nevada and graduated from Pacific University College of Optometry. He is co-founder of Eye Care Associates of Nevada, a state-wide medical/surgical co-management referral practice. He is director of the optometric residency program for the practice. He is past president and legislative chair for the Nevada Optometric Association and was named Nevada OD of the year in 1997. He is a Past President of the Great Western Council of Optometry and received the Optometrist of the year award in 2012 from the organization.

**Mark Dunbar, OD**

Mark T. Dunbar currently serves as the Director of Optometric Services and the Optometric Residency Supervisor at the University of Miami's Bascom Palmer Eye Institute. Dr. Dunbar has authored numerous papers, has refereed many optometric journals articles and currently writes the monthly Retina Quiz in Review of Optometry. He is also a Fellow in the American Academy of Optometry and is one of the founding members for both the Optometric Glaucoma Society (OGS) and the Optometric Retina Society (ORS).

**Kenneth Eakland, OD**

Currently, he serves as the Associate Dean for Clinical Programs at the College of Optometry since 1999. In his role he oversees the management of the College's network of five community clinics within the greater Portland area. As the course instructor for all preceptorship students, he is responsible for curriculum and development of over 100 external sites for College of Optometry students, which are located throughout the United States, Canada, Australia, Germany and Korea. He serves as the Residency Director for the seven residency programs affiliated with Pacific University College of Optometry where he is responsible for the overall coordination and development of the residency programs.

Dr. Eakland received his undergraduate degree in Biology in 1980 from Carroll College in Helena and the Doctor of Optometry degree in 1984 from Pacific University College of Optometry. Dr. Eakland currently holds the rank of Professor and has served at Pacific University since 1984 as a faculty member teaching various courses. Most recently he serves as overall course coordinator for the 11-course Patient Care track of Pacific University College of

Optometry. Together with the Clinical Directors they are redefining the clinical curriculum for all four years of the student intern's clinical education.

Dr. Eakland retired from his private clinical practice in which he owned and operated a highly successful full-time solo primary care practice in Lake Oswego Oregon from 1984 through 1998. He was awarded Oregon OD of the Year for 2005.

Dr. Eakland has facilitated numerous professional optometric courses throughout the United States and Canada. He is generally recognized as a major technology nerd!

**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.

**Steven Eiss, OD**

Dr. Eiss is Senior Partner of Eyecare of the Valley, a three location optometry/ophthalmology practice in southeast Pennsylvania. Dr. Eiss is a current member of the Third Party Center committees of both the American Optometric Association and the Pennsylvania Optometric Association, and is currently serving on the board of trustees of the Pennsylvania Optometric Association. Dr. Eiss currently serves as a representative to the Medicare Carrier Advisory Committee for Pennsylvania and served on the Pennsylvania Department of Health State Innovation Healthcare Model Workgroup in 2013.

**Arthur Epstein, OD**

Prolific author and popular lecturer; Director of Cornea - External Disease, Clinical Research - Phoenix Eye Care and the Dry Eye Center of Arizona; columnist "Review of Optometry" and Executive Editor, "Review of Contact Lenses"; Chief Medical Editor, "Optometric Physician E-Journal"; Past Chair, AOA Contact Lens & Cornea Section; Fellow British Contact Lens Association; Distinguished Practitioner National Academies of Practice; Clinical Adjunct Associate Professor, Midwestern Eye Institute, AZ College of Optometry, Phoenix; President ABCO

**Steven Ferrucci, OD**

Dr. Steven Ferrucci, a 1994 graduate of the New England College of Optometry, completed his Residency in Primary Care/Hospital Based/Geriatric Optometry at the Sepulveda VA Hospital in

Sepulveda CA. He is currently Chief of Optometry at the Sepulveda VA Ambulatory Care Center and Nursing Home. He is also the Residency Director at his sight, and an Associate Professor at the Southern California College of Optometry. His emphasis includes therapeutic treatment of glaucoma, cataracts, diabetic retinopathy, and age-related macular degeneration. He also performs on-site fluorescein angiography, including injections and digital imaging.. Dr. Ferrucci has lectured extensively, with a special interest in Diabetes, Diabetic Eye Disease, Age-Related Macular Degeneration, and Fluorescein Angiography. He has also published several articles in optometric journals, including The New England Journal of Optometry , Optometry and Vision Science, and Optometry: Journal of The AOA. He is an active member in the American Optometric Association and the National VA Optometric Association, as well as a fellow in both the American Academy of Optometry and the Optometric Retinal Society.

### **Charlie Ficco, OD**

Dr. Ficco is the Director of Clinics at Clayton Eye Center, a 12 doctor, multi-specialty practice in Morrow, GA. Prior to moving to Georgia, he spent two years at Bascom Palmer Eye Institute where he completed his residency in ocular disease and supervised the externship program. He is currently the Residency Coordinator, and Externship Coordinator at Clayton Eye Center. He is the primary investigator on two national studies and sub-investigator on 5 other studies. He lectures nationally on topics related to ocular surface disease and has written numerous articles.

### **Murray Fingeret, OD**

Dr. Murray Fingeret, a graduate of the New England College of Optometry, completed a residency at the Joseph C. Wilson Health Center in Rochester, New York. Dr. Fingeret is Chief of the Optometry Section, Brooklyn/St. Albans Campus, Department of Veterans Administration New York Harbor Health Care System. Dr. Fingeret is a Clinical Professor at the State University of New York, College of Optometry, a fellow of the American Academy of Optometry, the National Academies of Practice, American Glaucoma Society and sits on the Board of Directors of the Glaucoma Foundation. Dr. Fingeret is executive vice-president of the Optometric Glaucoma Society as well as chair of the Glaucoma Diplomate committee of the American Academy of Optometry. Dr. Fingeret, the recipient of the 1996 Otsuka Glaucoma Educators Award from the American Academy of Optometry and 1999 AMSUS Federal Service Optometrist of the Year award, has authored numerous articles and co-authored the texts 'Atlas of Primary Eyecare Procedures' and 'Primary Care of the Glaucomas'. Dr. Fingeret sits on the editorial boards of the Journal of Glaucoma, International Glaucoma Review, Primary Care Optometry News and Review of Optometry.

### **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

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

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 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 mid-sized 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.

#### **Ben Gaddie, OD**

Dr. Ben Gaddie earned his Doctor of Optometry from the University of Alabama-Birmingham School of Optometry. Dr. Gaddie then completed a Residency in Ocular Disease through Northeastern State University College of Optometry at the Triad Eye Medical Clinic and Cataract Institute in Tulsa, OK. Dr. Gaddie completed both his Residency and also a Fellowship in Glaucoma and Laser Therapy at NSU College of Optometry. Currently he is the owner and director of the Gaddie Eye Centers, a multi-location full service practice in Louisville that was started by his father over 40 years ago. He is a Fellow of the American Academy of Optometry and President of the Optometric Glaucoma Society (OGS). Dr. Gaddie is currently the chair of the Continuing Education Committee for the American Optometric Association. He is also the Immediate Past President of the Kentucky Optometric Association. Having published extensively in the ophthalmic literature, Dr. Gaddie serves on the editorial boards of Review of Optometry, Optometric Management, Primary Care Optometry News and Optometry Times. In 2011, Dr. Gaddie was inducted into the Oklahoma Pioneers in Optometry Hall of Fame.

#### **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.

**David Geffen, OD**

David I. Geffen received his BA in Biology from UCLA and his OD from UC Berkeley. He was in private practice in La Jolla from 1982 to 1994 before joining Gordon-Weiss-Schanzlin Vision Institute, a group practice. Dr. Geffen specializes in primary eyecare, contact lenses, and refractive and cataract surgery services. He is Director of Optometric and Refractive Surgery at GWSVI. He is an adjunct clinical faculty member of the Illinois College of Optometry. Dr. Geffen has lectured extensively on contact lenses, refractive and cataract surgery as well as compliance issues. He has published over 50 articles on these topics.

**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.

**Philip Gross, OD**

Dr. Gross obtained his undergraduate degree from Susquehanna University and his Doctor of Optometry Degree from the Pennsylvania College of Optometry. Prior to moving to Delaware, he completed a hospital based residency, was a Staff Optometrist and Attending at the VA Medical Center in Philadelphia, a Clinical Instructor at the Eye Institute of the Pennsylvania College of Optometry, and in private practice. He is currently a partner in Vision Quest Eye Care Center, a group private practice in Dover, Delaware. He first started in the computer consulting industry in 1982. He speaks and publishes nationally on topics related to technology in eye care and Electronic Health Records. As Past Chair of the AOA Practice Advancement Committee and Chair of the AOA Health Information Technology subcommittee, he has also published many articles on technology, e-prescribing, electronic records, Federal incentive programs and Federal legislation relating to eye care.

**Andrew Gurwood, OD**

Dr. Andrew S. Gurwood is a Professor of Clinical Sciences, an attending optometric physician in Module 1 of The Eye Institute of the Pennsylvania College of Optometry at Salus University and a member of the clinical staff of Albert Einstein Medical Center, Department of Ophthalmology. He has lectured and published nationally and internationally on a wide range of subjects in the arena of ocular disease. His areas of active research include diseases of the anterior and posterior segment. Doctor Gurwood earned a Diplomate from the American Academy of Optometry in the Section of Primary Care, where he serves as The Chair of The Section's Written Examination Committee and as a member of the Oral Examination Committee. He also serves in The American Academy of Optometry as a member of the Scientific Program Committee and as the Chairperson of the Written Examination Committee for the Disease Section Diplomate in Retina. He currently serves the profession at large through participation on the Editorial Boards of The Journal of The American Optometric Association (Optometry), The Southern Journal of Optometry, Review of Optometry, Clinical and Experimental Optometry (Aus), Optometry Today (UK), Primary Care Optometry News and Optometric Management. Other accomplishments include being a founding member of The Optometric Retina Society, a member of The Optometric Glaucoma Society, a Charter (Founding) Member of The Optometric Dry Eye Society, an Abstract Writer for Optometry: The Journal of The American Optometric Association and Diagnostic Quiz Columnist for Review of Optometry Journal. He is a regularly invited contributor for the journal Primary Care Optometry News. In 1998, he was recognized nationally as The American Optometric Association's Young Optometrist of The Year. He has

twice been recognized by his local optometric society (Buxmont) as the Optometrist of The Year and was recognized by the state of Pennsylvania as its OD of the year in 2006. In 2005, he received National acclaim, being inducted into the prestigious National Academies of Practice. Noteworthy, are the publication of his textbook 'The Optic Nerve in Clinical Practice,' (Butterworth / Heinemann) and his continuing efforts seen in Review of Optometry's yearly supplement The Handbook of Ocular Disease Management, now preparing for the release of a twelfth volume. Dr. Gurwood is also a dedicated community servant. He is the Chief Training Officer for The Northampton Township Volunteer Fire Company where he also serves as an Emergency Medical Technician and firefighter. He is a ProBoard Certified Vehicle Rescue Technician, Rope Rescue Technician, a State EMT Instructor and recently has matriculated as Faculty of The Pennsylvania State Fire Academy, Lewistown, PA.

### **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.

### **Nathan Hayes**

Nathan Hayes is Vice President of Practice Finance Consulting at Prima Eye Group, where he also works on business development and vendor relations. Nathan is an eight-year veteran of the eyecare industry having worked in Vendor Relations for HMI Buying Group and Red Tray before joining Prima Eye Group at its inception. He has completed more than 1000 member consults with over 500 different independent optometry practices during that time, helping OD practice owners manage their overhead, grow practice revenues, and maximize their personal income, free time, and professional satisfaction.

### **Whitney Hauser, OD**

Dr. Whitney Hauser received her Doctor of Optometry degree in 2001 from Southern College of Optometry. She completed a postgraduate residency in Primary Care Optometry at the Southern College of Optometry in 2003.

Prior to joining the SCO faculty as Assistant Professor, Dr. Hauser served as Clinical Director and Research Coordinator at an ophthalmology referral center in Memphis, Tennessee. Dr. Hauser has authored several articles focusing on the management and treatment of ocular surface disease, the anterior segment and practice management. She has been an invited speaker across the United States and internationally.

Dr. Hauser provides clinical care for patients at TearWell: Advance Dry Eye Treatment Center and the Advanced Care and Ocular Disease Service at Southern College of Optometry. She is, also, founder and senior consultant for Signal Ophthalmic Consulting (SOC). SOC designs premier care plans for optometry and ophthalmology practices with an emphasis on dry eye care and cataract/refractive surgery.

**Jay Haynie, OD**

Dr. Jay M. Haynie received his Doctorate of Optometry from Pacific University College of Optometry in 1992. He then completed a post-graduate residency at American Lake Veterans Hospital in Tacoma, Washington where the focus was on geriatric optometry and ocular disease in 1993. Dr. Haynie was recruited by Willie Shields, M.D. to become a part of Retina & Macula Specialists where he currently serves as the Executive Clinical Director. He serves as adjunct assistant professor at Pacific University College of Optometry, is a Fellow of the American Academy of Optometry and a member of the Optometric Retina Society. Dr. Haynie is a frequent lecturer and author on retinal disease, new management strategies, updates on current diagnostic instrumentation and its role in management of ocular disease as well as many case presentations in the standard grand rounds format.

**Jay Henry, OD**

Dr. Henry obtained both his Doctor of Optometry and his Master of Science Degrees from The Ohio State University. Dr. Henry is a Clinical Assistant Professor as well as a Primary Care Extern Preceptor for The Ohio State University College of Optometry. He is currently a partner at Hermann and Henry Eyecare, a group private practice near Columbus, Ohio. Dr. Henry speaks nationally and has published numerous articles on topics related to Electronic Health Records, paperless practices, technology, e-prescribing, PQRS (PQRI) and ocular disease. He is known nationally for his vast knowledge of the Federal incentive programs, as well as advanced technology used in eye care.

**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.

**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.

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, BSE, MSE**

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.

**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'.

**Dave Kading, OD**

Dave Kading owns Specialty Eyecare Group, a two practices, 3 doctor practice in Seattle Washington. He graduated from Pacific University and completed a residency in cornea and contact lenses prior to moving to Seattle. Specialty Eyecare Group encompasses primary care with subspecialties including pediatrics and binocular vision, glaucoma and retinal disease, anterior segment, dry eye and contact lenses. Dr. Kading specializes in complicated contact lens fitting, keratoconus, ocular surface disease, and the anterior segment. He welcomes students from 5 different schools into the practice and co-owns Optometric Insights with Dr. Mile Brujic. Optometric Insights educated clinicians in novel and unique ways as well as providing career coaching for optometry students. Dr. Kading enjoys research, writing, and has lectured in over 30 states on topics including practice management, career development, anterior segment, and contact lenses. He works closely with industry, publications, local, state, and national organizations to help enrich patients and practitioners lives.

**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.

**Neera Kapoor, OD**

Dr. Neera Kapoor is an Associate Clinical Professor of Optometry at SUNY-College of Optometry and the former Chief of Vision Rehabilitation Services at SUNY-College of Optometry's University Eye Center (UEC) in New York City. She has co-authored 30 peer-reviewed articles, 9 textbook chapters, and 25 poster presentations, as well as having

lectured regionally, nationally, and internationally, regarding vision and acquired brain injury.

**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.

#### **Pete Kollbaum, OD**

Pete Kollbaum, OD, PhD, FAAO, FBCLA, is Associate Dean for Research, and Director of the Borish Center for Ophthalmic Research at the Indiana University (IU) School of Optometry. After receiving his OD degree, Dr. Kollbaum worked in a private multidisciplinary practice in Iowa prior to returning to IU where he received a Masters degree in Clinical Research and a PhD degree in Vision Science. Following receiving his research training he accepted a faculty position at IU, where he teaches and performs research in the areas of contact lenses and optics.

#### **John Lahr, OD**

Dr. John Lahr received his Doctor of Optometry degree from the Indiana University School of Optometry in 1974. Dr. Lahr is a recognized speaker on many eye care topics including coding

and billing, nutritional supplements and ocular surface disease. He was an original member of the Clinical Practice Guidelines Committee of AOA to develop practice standards and protocols for the profession. Dr. Lahr served as AOA's first representative to the American Medical Association's CPT coding committee. He is a Past President of the Minnesota Optometric Association and was the MOA Optometrist of the Year in 1989. Over the past 15 years, Dr. Lahr has served the ophthalmic surgical product industry as a consultant in the areas of product development, surgeon training and clinical education to ophthalmologists and optometrists. He currently serves as Vice President of Provider Relations and Medical Director for EyeMed Vision Care.

**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.

**Nathan Lighthizer, OD, FAAO**

Dr. Nathan Lighthizer, O.D., F.A.A.O., is a graduate of Pacific University College of Optometry. Upon graduation, he completed a residency in Family Practice Optometry with an emphasis in Ocular Disease through Northeastern State University Oklahoma College of Optometry. Dr. Lighthizer has since joined the faculty at the Oklahoma College of Optometry and serves as the Chief of Specialty Care Clinics and the Chief of Electrodiagnostics Clinic. He was recently named the Director of Continuing Education as well as the Clinic Director at the Oklahoma College of Optometry. Dr. Lighthizer lectures nationally on numerous topics, most notably advanced ophthalmic procedures, electrodiagnostics, and ocular disease.

**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.

**Richard Madonna**

Dr. Richard J. Madonna is Professor and Chairman of the Department of Clinical Education and Director of the Office of Continuing Professional Education at the SUNY College of Optometry. He has lectured nationally and internationally on topics relating to ocular disease, ophthalmic imaging, and therapeutic drugs. He is a co-author of the texts, Emergency Care in the Optometric Setting and The Photoreceptor Integrity Line – as Imaged by Spectral Domain OCT. He currently serves on the Executive Committee of the Optometric Glaucoma Society. He is a recent winner of the SUNY College of Optometry Alumnus of the Year and New York State Optometric Association Optometrist of the Year awards.

**Kelly Malloy, OD**

Dr. Kelly Malloy is an Associate Professor at the Pennsylvania College of Optometry at Salus University, where she specializes in neuro-ophthalmic disease. She is the Director of the Neuro-Ophthalmic Disease Specialty Service, and has achieved diplomate status in this specialty at the American Academy of Optometry (AAO). Besides her clinical patient care responsibilities, she also teaches the didactic Neuro-Ophthalmic Disease course at Salus.

**William Marcolini, OD**

Dr. Marcolini graduated from the Pennsylvania college of Optometry in 2001. Upon graduation Dr. Marcolini completed a residency in Ocular Disease at Omni Eye Services in New Jersey where he currently serves as Consultative Optometrist and was the Clinical Externship Director. He serves the New Jersey Society of Optometric Physicians as the immediate past President, a member of the Clinical Care Committee, and the co-chairman of the Industry Relations Committee. He has lectured nationally at the meetings of the American Optometric Association, American Academy of Optometry and SECO, as well as numerous regional meetings. In addition he has been published in Review of Ophthalmology, Review of Optometry and Optometric Management. In 2014 he was named New Jersey's optometrist of the year.

**Zach McCarthy, OD**

Zachary S. McCarty, O.D. completed his undergraduate work at Transylvania University in Lexington, KY, during 2002, earning a B.A. in Biology with a minor in Philosophy. In 2006, he received his Doctor of Optometry degree from the University of Alabama at Birmingham School of Optometry (UAB). While at UAB, Dr. McCarty was selected by the Dean as the Outstanding Optometry Student in his class. In addition, his classmates presented him with the class "Leadership Award". Dr. McCarty completed a residency in Pediatrics and Ocular Disease at SouthEast Eye Specialists in 2007. Upon completion of his residency, Dr. McCarty joined the practice as a staff Optometrist and has fulfilled the role of Director of Health Information Technology (CMIO) since 2008.

Dr. McCarty is the current Secretary-Treasurer and Third-Party Chair of the Tennessee Association of Optometric Physicians, and an active member of the American Optometric Association, serving on the Quality Improvement-Registry Committee. He is part of the national Pediatric Eye Disease Investigative Group (PEDIG). In addition, he is President-elect of the UAB School of Optometry Alumni Board. Dr. McCarty is an Eagle Scout and enjoys volunteering as an Assistant Scoutmaster of a local Boy Scout Troop and serves on the Executive Board of the local Boy Scout Council as the Vice President of Program.

**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.

**Ron Melton, OD**

Ron Melton is currently in a large group practice as an optometrist in Charlotte, North Carolina where he has staff privileges at Presbyterian Hospital. Dr Melton earned his OD degree from the Pennsylvania College of Optometry in Philadelphia. He then served as a clinical optometrist in the U.S. Army, where he attended the Armed Forces Institute of Pathology course in Ophthalmic Pathology for Ophthalmologists. Dr Melton is a consultant to the Council on Optometric Education for the American Optometric Association and a member of the American Optometric Association's Contact Lens Section. He is also member of the adjunct faculty at the Pennsylvania College of Optometry, State University of New York College of Optometry, the Pacific University College of Optometry, and Indiana University School of Optometry. Dr Melton has lectured internationally on ocular disease and pharmacology. He sits on the editorial boards of Optometric Physician and Primary Care Optometry News and is a contributing editor to Clinical and Refractive Optometry. He has authored or co-authored over 100 papers on optometry and is

the co-author of the popular annual 'Clinical Guide to Ophthalmic Drugs' for Review of Optometry. Dr. Melton has acted as an investigator in more than 40 clinical research trials.

**Andrew Morgenstern, OD**

In late 2012 Dr Morgenstern accepted a position to serve as a Subject Matter Expert and Healthcare Consultant with the firm of Booz Allen Hamilton. His current assignment is with the organization created by the US Congress, The Vision Center of Excellence at Walter Reed National Military Medical Center in Bethesda, Maryland. As a freelance consultant, he is the current Director of Clinical Services for TLC Vision. Prior to his current positions, Dr. Morgenstern served as the Director of Optometric Services and The Vision Correction Center at Washington Eye Physicians and Surgeons. For two years at Washington Eye he was The Official Team Optometrist for The Georgetown University Hoyas Men's Basketball Team. Dr Morgenstern is a graduate of Boston University and Nova Southeastern College of Optometry. On May 19, 2012 Dr Morgenstern was awarded the Distinguished Alumni Award for Service to Profession from his undergraduate alma mater, Boston University. The award was presented at the 2012 Boston University commencement. He completed his training at the world-renowned Bascom Palmer Eye Institute / Jackson Memorial Hospital at the University of Miami, School of Medicine. From 2004-2010 Dr Morgenstern served as the Southeast Atlantic Regional Clinical Director for TLC Laser Eye Centers and was the TLC national education coordinator and lecturer for all national and international optometric meetings. He has been an Optometric leader in refractive surgery for the past thirteen years. In that time he has seen over 85,000 refractive surgery patients and worked with and taught refractive surgery to over 250 surgeons. As a former faculty member of The Washington Hospital Center / Georgetown University School of Medicine, Department of Ophthalmology and The University of Virginia School of Medicine, Department of Ophthalmology, Dr. Morgenstern supervised the Medical Resident Refractive Surgery Programs. He is also an Assistant Professor at Southern California College of Optometry and frequent lecturer at many schools of Optometry. His articles have been featured in many medical journals print and online media. Dr. Morgenstern lectures extensively nationally and internationally on refractive surgery, refractive technology, collagen cross-linking, anterior segment disease, pharmaceuticals and optometric best practices.

**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 Tulsa, OK. He is the director of Morris Education & Consulting Associates as well as Ocular Technology Solutions, Inc. He is also a member of the AOA and COA. 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.

**Marc Myers, OD**

Senior Staff Optometrist at the Coatesville VAMC, Coatesville, PA. Adjunct clinical staff at The Pennsylvania College of Optometry, Eye Institute. Contributing course lecturer covering Lens Disease in Anterior Segment Disease at PCO. Multiple lectures and publications in the area of Ocular Disease.

**Lynne Noon, OD**

Dr. Lynne Noon founded the ViewFinder Low Vision Resource Centers located in Arizona where she practices low vision rehabilitation on a full-time basis. She earned a Bachelor of Science degree at Providence College in Rhode Island and a Doctor of Optometry degree at the New England College of Optometry in Boston, Massachusetts. She is Arizona's only diplomate in low vision rehabilitation.

Dr. Noon is a Fellow of the American Academy of Optometry, a Diplomate in Low Vision Rehabilitation of the American Academy of Optometry, a member of the American Optometric Association, a member of the American Optometric State Association Low Vision Committees Task Force, a member of the American Optometric Association Low Vision Section and a member of the Association for Education and Rehabilitation of the Blind and Visually Impaired. She is the chair of the Arizona Optometric Low Vision Section, a board member and founder of Arizona's Vision Rehabilitation & Technology Expo and sat for two terms on the Arizona Governor's Council for the Blind and Visually Impaired.

**Jim Owen, OD**

Dr Owen is a graduate of the Illinois College of Optometry and has a Masters in Business Administration from San Diego State University. He has a private practice in Encinitas, CA. He is a Fellow of the American Academy of Optometry.

**Vitor Pamplona**

**TBD**

**Thomas Porter, OD, FAAO**

Dr. Porter is the Director of Low Vision Services at Saint Louis University Department of Ophthalmology. His practice has been limited to low vision patients for over 30 years and he has both written and lectured extensively throughout North America. This lecture will feature various problems and challenges patients have presented in his practice.

**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.

**Lisa Renzi Hammond**

Dr. Lisa Renzi Hammond earned her B.S., M.S. and doctorate degrees in psychology from the University of Georgia Neuroscience and Behavior Program. While at University of Georgia, Dr. Renzi specialized in neurological and visual development and studied ways in which implementing behavior changes influenced visual and cognitive function, as well as risk for acquired neurological diseases across the lifespan. Dr. Renzi Hammond completed her postdoctoral fellowship at the University of Texas at Austin while engaging in three disciplines: perceptual systems, neuroscience, and nutrition sciences. Dr. Renzi Hammond also served as a visiting scientist at the Jean Mayer USDA Human Nutrition Research Center on Aging at Tufts University in Boston, MA where she was a member of the Carotenoids in Health Laboratory. Following her graduate and post-graduate training, Dr. Renzi returned to the University of Georgia as a Clinical Assistant Professor, where she founded the Human Biofactors Laboratory, where she has completed clinical trials on carotenoids and various visual and cognitive functions and published numerous peer-reviewed articles and book chapters on the topics of carotenoids and visual and neurological function and development. She has presented this research in a wide variety of national and international venues.

**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.

**Mark Schaeffer, OD**

Mark Schaeffer is a graduate of the Southern College of Optometry. After finishing his residency in ocular disease at Bascom Palmer Eye Institute in Miami, Florida he moved to be an optometrist at Schaeffer Eye Center in Birmingham, Alabama. He practices in a 16 office, 23 doctor practice along with his father and sister. He currently lectures across the United States on ocular disease. He is an active member in the AOA, AAO, and state and local organizations.

**Eric Schmidt, OD**

Eric E. Schmidt, O.D. is the President of Omni Eye Specialists, a multi-specialty practice headquartered in Wilmington, NC. Dr. Schmidt completed his undergraduate degree from the University of Illinois and his O.D. degree from the Pennsylvania College of Optometry. He completed a residency in Ocular Disease from The Eye Institute in Philadelphia and a fellowship in Glaucoma. Dr. Schmidt is an adjunct professor at many schools and colleges of Optometry and lectures internationally on eye disease. He is the author of the textbook CLINICAL PROCEDURES OF THE LID AND NASOLACRIMAL SYSTEM and authors the monthly column "Clinical Challenges" in Optometric Management. He specializes in treating patients with glaucoma and neuro-ophthalmic diseases.

**Louise Sclafani, OD**

Louise A. Sclafani, OD, FAAO, a 1989 alumnus 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.

**Leo Semes, OD**

Leo P. Semes, OD, is Professor of Optometry at UAB. He earned his OD from Pennsylvania College of Optometry and completed residency at The Eye Institute of PCO. Dr. Semes has authored or over 220 scientific articles, book chapters and posters. He is a fellow of the American Academy of Optometry, as well as an active member of the AOA, chairing the Nutrition and Health Committee. Dr. Semes is a founding member of the Optometric Glaucoma Society and a founding fellow of the Optometric Retina Society.

**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.

**Diana Shechtman, OD**

Diana Shechtman is an associate professor of optometry at Nova Southeastern University College of Optometry, where she serves as an attending optometric physician at the eye institute and diabetic/macula clinic. Dr. Shechtman is a member of the American Optometric Association (AOA) and she is a fellow of the American Academy of Optometry (AAO), as well as the Optometric Retinal Society (ORS). Her area of interest has centered on retinal disease and other ocular pathologies. She has participated in various research projects, authored numerous posters and publications. She is a member of the editorial board for the Optometry journal, Optometry times, and Review of Optometry, where she co-author the monthly 'Research Review' column. She also is also a member of the macular degeneration association and ocular nutrition society advisory board. She has also lecture on a local national & international level on areas in retinal disease.

**Jerome Sherman, OD**

Having graduated from Pennsylvania College of Optometry, he presently holds the position of Distinguished Teaching Professor at State University of New York College of Optometry and the Schnurmacher Institute of Vision Research.

**Rishi Singh, MD**

TBD

**Kirk Smick, OD**

Having graduated from Pennsylvania College of Optometry, he presently holds the position of Distinguished Teaching Professor at State University of New York College of Optometry and the Schnurmacher Institute of Vision Research.

**Richard Soden, OD**

1979 SUNY Grad, Residency Trained, Former President New York State Optometric Association, Clinical Professor, SUNY College of Optometry, Former Associate Chief, Optometry Service, VA Medical Center, Nortport, NY, Current VP for Clinical Affairs, SUNY College of Optometry

**Joseph Sowka, OD**

Dr. Sowka received his undergraduate training at Cornell University and his Doctor of Optometry degree and residency training from the Pennsylvania College of Optometry (PCO). Dr. Sowka is a Professor of Optometry at Nova Southeastern University College.

**George Spiropoulos**

Senior Vice President

Financial Advisor

Professional Alliance Group Director

Family Wealth Director

Professional Details

BlueStone Group Senior Partner

As a CERTIFIED FINANCIAL PLANNER™, George focuses on financial planning and asset management for our high-net-worth clients. He works closely with clients, their attorneys, accountants and other advisors to help develop customized wealth management strategies that support a wide variety of disciplines, including cash and investment management, fixed income, access to lending services and insurance. As a Director in Morgan Stanley's Professional Alliance Group, he has aligned with many centers of influence to provide customized Wealth Management services to high-net-worth clients through Morgan Stanley's Professional Alliance platform. George and his wife currently reside in NJ with their three children. He currently serves on the board of trustees for the SUNY College of Optometry and the Morgan Stanley

Executive Business Owners Council. George's interests include travel, cooking and community service.

**Charles Stuckey, OD**

PENNSYLVANIA OPTOMETRIC ASSOCIATION, Harrisburg, PA (1997 - Present), Executive Director, Primary areas of responsibility include staff supervision, contract negotiations, organizational development, finance and budgeting, editing publications, legislative and regulatory affairs supervision as a registered lobbyist, and strategic planning and management., KILMORE EYE ASSOCIATES, Mechanicsburg, PA (1987 - 1997), Managing Partner, Primary areas of responsibility included finance and budgeting, quality management, human resource management, practice promotion, integration and development, managed care business strategy, and intra and inter-professional relations. STUCKEY AND ASSOCIATES HEALTH CARE CONSULTANTS, Camp Hill, PA (1974 ' Present) , OMEGA MARKETING GROUP (1985 '1987), Director, Health Care Services, METROPOLITAN BALTIMORE HEALTH CARE, INC. (1984 ' 1985), Consultant for HMO Development. HOSPITAL COUNCIL OF CENTRAL PENNSYLVANIA (1982 ' 1984), Planning and Marketing Consultant, PRIVATE PRACTICE OF OPTOMETRY (1974 ' 1987)

**Aaron Tarbett, OD**

Dr. Tarbett is the former chief of Optometry at the Walter Reed Army Medical Center and served as the White House Optometrist to both the Bush and Obama administrations. He has served as the subject matter expert for civilian affairs in Army Optometry and collaborated in the development of the Vision Center of Excellence. Dr. Tarbett is a published researcher and has lectured at the White House, Pentagon and Camp David. Currently, he is at the WG Hefner VA Medical Center in Salisbury, North Carolina.

**Craig Thomas, OD**

Craig Thomas is from Dallas, Texas and he earned his Doctor of Optometry degree in 1983. Dr. Thomas has been in private practice for twenty seven years and is a frequent speaker and consultant. He was named Optometrist of the Year by the Texas Optometric Association in 2001.

**Randall Thomas, OD**

Dr. Thomas is a 1981 graduate of the Pennsylvania College of Optometry, and a 1976 graduate of the School of Public Health at the University of North Carolina. He is in full-time clinical practice in Concord, North Carolina. He was presented the AAO Glaucoma Educator of the Year award by the American Academy of Optometry in 1997. He and Dr. Ron Melton co-author Review of Optometry's Annual Drug Guide to Ophthalmic Drugs now in its thirteenth year. He is on the Professional Staff at Northeast Medical Center, where he also serves on the teaching faculty of the Department of Family Medicine. Dr. Thomas has served as a consultant to the American Optometric Association on its Council on Clinical Optometric Care and Hospital Privileges Committees. He has served as an ophthalmic drug principal investigator for the FDA.

Dr. Thomas has lectured world-wide with Dr. Melton on the diagnosis and treatment of eye diseases. He holds academic appointments at the Pennsylvania College of Optometry, SUNY College of Optometry, and the Pacific University College of Optometry. He and his wife Cheryl have two daughters.

**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.

**Derek Van Veen**

Dr. Van Veen currently serves as Clinical Director for TLC Laser Eye Centers in Greenville, SC. He is also a member of TLC's Clinical Director Advisory Group. Dr Van Veen received his Doctor of Optometry and MS in Physiological Optics in 2000 from the University of Alabama Birmingham. He completed his Bachelor of Science in Mathematics at Furman University. Since graduating optometry school, Dr. Van Veen has concentrated on refractive surgery. He enjoys lecturing on laser vision correction and anterior segment disease throughout the country. He currently serves on the South Carolina Board of Examiners in Optometry, is a Diplomate of the ABO, and is a member of the AOA, SCOPA, and OCRT. Dr. Van Veen is married with one son. Besides optometry, he has a passion for golf, wakeboarding, snowboarding, and running.

**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**

**Walter Whitley, OD**

Walter Whitley serves as the Director of Optometric Services at Virginia Eye Consultants in Norfolk, Virginia where his practice encompasses ocular surface disease, glaucoma, surgical co-management, clinical research and the supervision of an extensive referral network. He completed an optometric residency in ocular disease, refractive and ocular surgery at Eye Care Associates of Nevada.

**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 Collegeville, 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.

**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.



April 14-17, 2016

The following courses have been **APPROVED** by:

**COPE**

(Council on Optometric Practitioner Education)  
As of January 6, 2016

**IMPORTANT:** Practitioners are advised to check directly with their own optometry state board office to clarify any special conditions attached to the COPE acceptance.

Course #	COPE #
10L4	46011-AS
10L5	46030-AS
11B2	42075-PM
11C2	43965-AS
12C1	42218-PH
12C2	47645-NO
13C2	47472-PM
20C3	44870-IS
21C1	39974-GO
21C2	47564-AS
22C2	43513-GL
22C4	43710-PM
22C5	42609-PH
23C1	45947-PD
23C2	44255-AS
23C3	46050-AS
23L1	42392-CL
24C5	47506-AS
24C6	44363-GO
24C7	43873-GL
25B6	42230-PM
26B4	46111-PM
26C2	47510-FV

Course #	COPE #
26C3	47502-PD
26C4	42355-GO
26C6	42453-PH
26C7	47423-GL
26L1	47444-PB
30C7	45363-PH
31B3	46422-PM
31B4	43640-PM
31B6	45862-PM
31C1	44409-LV
31C2	47524-GO
31C5	43874-AS
31C6	47424-GL
32B1	44012-PM
32B5	47422-PM
32B6	45971-PM
32C5	46289-PS
32C7	44380-GL
33B1	47651-PM
33B3	41689-PM
33B5	46132-PM
33B6	42231-PM
33C1	47543-PS

Course #	COPE #
33C2	43793-GL
33C3	47483-SD
33C5	41449-PS
34B3	45932-PM
34C5	47537-PS
34C7	42607-AS
34L1	47412-AS
41C2	44088-PS
41C3	44064-NO
41C4	41927-GO
41L1	41384-CL
42B2	47311-PM
42L1	40071-CL
43C4	47445-PH
44B2	47407-PM
44C3	47580-NO
44C4	47565-OP
45B2	47406-PM
45C1	44190-AS
45C3	43681-NO
MS33	46002-GO

NOTE: You will **not** receive credit if you are late to a class.  
**Do not assume** that the courses you registered for will be automatically approved.



**April 14 – 17, 2016**

**The following courses are COPE PENDING**  
*(Council on Optometric Practitioner Education)*

As of January 6, 2016

Course
10L1
10L2
10L3
11B3
11C1
11C3
11C4
11C5
11C6
11L1
12B2
12C3
12C4
12C5
12C6
12L1
13B2
20B1
20C1
21B2
21C3
21C4
22B1

Course
22B2
22B4
22B6
22C3
22C6
22C7
22C8
22O1
23B3
23B5
23C5
23C7
24B5
24B6
24C1
24C3
24O2
25B3
25B4
25B5
25C1
25C2
25C3

Course
25C4
25C5
25C6
25C7
25L1
26B2
26B3
26B5
26C1
26C5
27C4
31B2
31B5
31C3
31C4
31L1
32B4
32C1
32C2
32C3
32C6
32L1
32O2

Course
33C4
33C6
33C7
33L1
34B2
34B4
34B5
34C1
34C2
34C3
34C4
34C6
41C1
42C1
42C3
43C2
43C3
44C1
44C2
44C5

**NOTE:** You will **not** receive credit if you are late to a class.  
**Do not assume** that the courses you registered for will be automatically approved.

Tab 5  
d # 2

**Tab 5 d. # 2. Continuing Education (CE) – Course Approvals**

Hi Angie,

You may recall how we spoke on the phone about the new South Carolina Chapter of the American Academy of Optometry. We were approved by the national board of directors of the AAO and I've attached our approval letter to this email. We spoke about how we are a non-profit organization and are planning to have CE meetings for the optometrists of South Carolina. You said that CE provided by us should fall in the unlimited category and offered to have the board give me an official statement as such. Could you please present the attached letter to the board and get me a written statement that our CE would fall in the unlimited category? I want to avoid any confusion for optometrists who come to our CE meetings. Please call me if you have any questions at 704-685-3958.

I also should have mentioned in my first email that the SC Chapter is in the process of becoming an ARBO administrator and all of the CE courses and events we provide will be COPE approved. Our first meeting will be June 4th 2016.

Thanks very much,  
Anthony Van Alstine OD, MS, FAAO, FSLs  
Clinical Externship Program Co-coordinator  
WJB Dorn VAMC Columbia SC



AMERICAN ACADEMY  
of OPTOMETRY

2909 Fairgreen Street  
Orlando, FL 32803 USA  
(321) 710-EYES (3937), Fax: (407) 893-9890  
AAOptom@AAOptom.org • www.aaopt.org

November 23, 2015

Dr. Anthony W. Van Alstine  
1001 True Street  
Apt 314  
Columbia, SC 29209-1747

Dear Dr. Van Alstine,

It is my pleasure to notify you that the American Academy of Optometry Board of Directors has approved your application to establish the South Carolina Chapter of the American Academy of Optometry (Motion 15-11-03).

The South Carolina Chapter is now officially affiliated with the American Academy of Optometry and is justly entitled to all the rights and benefits thereof, for itself and its members. The Chapter is required to apply for and maintain independent 501(c)(3) nonprofit status and a separate Federal EIN number.

We have noted in our records that you will serve as Interim President of the South Carolina Chapter until the organization can hold its first official election according to the bylaws submitted with your application. The Board liaison to Chapters is Dr. Charles Kinnaird and the Academy Staff liaison is Jenny Brown.

On behalf of the Academy staff and Board of Directors, thank you for your dedication to the Academy and advancing its mission of promoting the art and science of vision care. If I or any of the Academy staff can be of service to you, please feel free to contact us.

Sincerely,

Brett G. Bence, OD, FAAO  
President, American Academy of Optometry

Tab 5 e.

**Missy Jones**

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**From:** Donna DeLay [DDeLay@arbo.org]  
**Sent:** Tuesday, February 02, 2016 3:48 PM  
**To:** Donna DeLay  
**Subject:** Start Making Plans for the ARBO 2016 Annual 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.**

ARBO Member Licensing Boards,

It's time to start making your plans for the 2016 ARBO Annual Meeting. This year's meeting is taking place June 26-28, 2016 at the Westin Boston Waterfront in Boston, Massachusetts. The ARBO meeting is a unique forum for the optometric regulatory community, including board members, public members, and staff from optometric licensing boards in the US, Canada, Australia and New Zealand. A variety of subjects related to optometric licensure and discipline will be discussed.

Registration for the meeting is now open on our website. You can also make your hotel reservations online. Just go to our website for more information: [https://www.arbo.org/2016\\_meet.php](https://www.arbo.org/2016_meet.php) The Annual Meeting Planning Committee is already hard at work planning the program. If you have any "hot topics" you'd like to see discussed or suggestions for agenda items, please let me know. I look forward to seeing you in Beantown in June!

Regards,

*Lisa Fennell*  
Executive Director  
Association of Regulatory Boards of Optometry  
200 South College Street, Suite 2030  
Charlotte, NC 28202  
Main Phone: 704-970-2710  
Direct Dial: 704-970-2755  
Fax: 888-703-4848  
[www.arbo.org](http://www.arbo.org)



**Mark your calendar for the 97th ARBO Annual Meeting!**  
June 26-28, 2016  
Westin Boston Waterfront  
Boston, Massachusetts

## NOTES ON OPTOMETRY BOARD MINUTES

8/9/2006—discussion of combining wall certificate fee with application fee—no references to authority

3/28/2007—mention of further discussion of branch registration fees at 6/19/2007 meeting—no references to authority

6/19/2007—“Section 40-37-325 states that every optometrist must display a separate certificate of licensure certified by the Board in each location in which the optometrist practices. Duplicate certificates of licensure may be obtained from the Board by filing an application on a form prescribed by the Board and paying the prescribed fees. Discussion followed. Ms. Dantzer advised **reviewing the entire fee structure** and then addressing any fee changes after the budget presentation has been made at the September 26, 2007 meeting. **The Board is not restricted by law from changing the fee schedule; Section 40-1-50 provides legislative guidance.**” (emphasis added)

9/26/2007—licensee petitioned for refund branch location fees; Board determined fees are “non-fundable [sic] cost of doing business”—no references to authority

11/29/2007—resolution of issue raised at 6/19/2007 meeting: no changes made—no references to authority

6/11/2008—explanation of license renewal process and fees—no references to authority

12/4/2008—mention that information is being gathered “concerning fees charged for branch offices”—no references to authority

9/23/2013—“Ms. Pisarik presented to the Board an LLR Update and a fee adjustment proposal that included an increase in the licensee renewal fees. Ms. Pisarik explained that by Law the Board must be financially stable. Discussion ensued. The Board requested additional information prior to voting on the proposal.” (no specific references to authority)

2/5/2014—“Ms. League provided information to the Board concerning options for the display of their fees. **A motion was made by Dr. Van Veen to continue to leave fees out of Law and Regulations. The motion was seconded by Dr. Vaught. The motion carried unanimously.**” (emphasis added; no specific references to authority)

7/29/2015—“A motion was made by Dr. Vaught to add an additional \$100.00 fee for all Endorsement Applications. The motion was seconded by Dr. Tucker and carried unanimously. **Mr. Jennings will research the Board’s fee change authority prior to the fee increase being implemented.**” (emphasis added)

Table  
#3

July 27, 2015 07:33 AM Eastern Daylight Time

CHICAGO--(BUSINESS WIRE)--Opternative, the world's first online eye exam service, is now available to provide consumers with a convenient and affordable physician-issued prescription for glasses or contacts. By using a computer and smartphone, consumers can take a 25-minute or less eye exam from the comfort of home and receive a prescription within 24 hours to use at any online or neighborhood optical retailer.

"Our technology and team of ophthalmologists make eye exams convenient and affordable while providing consumers a choice of where and when they want to receive eye exam services."

Opternative exams cost \$40 for a prescription for glasses or contacts and \$60 for both. Prescriptions are issued and signed by an ophthalmologist licensed in the patient's state. There are no additional fees.

A recent physician-led clinical trial found strong correlation between Opternative's eye exam software and traditional in-office refractive eye exams, delivering statistically equivalent patient satisfaction and visual acuity with the resulting prescription. Learn more about Opternative's clinical trial [here](#). More than 1,500 patients have been evaluated using the Opternative eye exam, and the service is currently available in 27 states covering 75 percent of the U.S. 18-40 year old population, with more expected soon.

"As a Food & Drug Administration (FDA) registered software technology, the Opternative eye exam uses a set of vision tests and algorithms to provide clinical decision support to ophthalmologists who determine the appropriate diagnosis and issue the right prescription for each patient," said Dr. Steven Lee, optometrist and co-founder of Opternative.

Using Opternative is simple and efficient. First, a patient signs up at [Opternative.com](#). Next, a series of written and audio instructions walk the patient through several multiple choice vision tests presented on his or her computer screen. The patient uses a smartphone to record answers. Once the online exam is completed, a licensed ophthalmologist evaluates the patient's results, health information and medical history, including past vision exam records, all while engaging the patient in a standard manner. Then, if clinically appropriate, the ophthalmologist issues a prescription that is delivered to the patient or the patient's designated eyewear provider through Opternative's secure Health Insurance Portability and Accountability Act (HIPAA) compliant platform.

Of the U.S. adult population (242.7 million, Dec. 2013), just over three-fourths use some form of vision correction, according to VisionWatch, a research study conducted by The Vision Council. More than 12.8 million adults admit they need vision correction but do nothing about it. The same research found that 67 million adults have not had an eye exam within the last two years, due to convenience and cost issues.<sup>1</sup>

"Our technology and team of ophthalmologists make eye exams convenient and affordable while providing consumers a choice of where and when they want to receive eye exam services," said Aaron Dallek, Opternative's chief executive officer and co-founder.

Currently, Opternative's online eye exam is available for adults between 18 and 40 years old. While the Opternative ophthalmologists are able to provide patients with a prescription quickly and conveniently, Opternative's services are not a replacement for a comprehensive eye health exam. Opternative ophthalmologists recommend that all patients receive an eye health exam at least once every two years. Opternative will not allow patients to use its prescription services more than four consecutive times within a five-year period without first receiving an eye health exam, in accordance with the American Academy of Ophthalmology's recommendations (AAO)<sup>2</sup>. Patients with certain symptoms or medical conditions will be prevented from taking the Opternative exam, or be encouraged to get a full eye health exam more frequently.

For more information or to sign up for an online eye exam, visit [Opternative.com](#).

The Opternative eye exam is available in 27 states, covering 75 percent of the 18-40 year old population, with more expected soon. The available states include: Arizona, California, Colorado, Connecticut, Florida, Georgia, Illinois, Indiana, Kentucky, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, Nebraska, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Tennessee, Utah, Virginia, Washington and Wisconsin.

### **About Opternative**

Opternative Inc., a Chicago based healthcare technology company founded in 2012, has launched the world's first online refractive eye exam that delivers a physician-issued prescription for glasses or contact lenses. The Opternative eye exam is interactive and follows the same subjective principles applied in an eye care professional's office where patients are asked to respond to a series of questions based on images presented to them. The software uses a series of vision tests, algorithms and patient medical history to provide ophthalmologists with a clinical decision support tool that enables them to diagnose patients with nearsightedness, farsightedness, astigmatism, emmetropia and to prescribe glasses or contacts when appropriate. With a mission to help the world see and feel better, the Opternative eye exam will make vision screening and prescription services accessible and affordable to everyone.



The Optometric Society  
PO Box 8288  
La Jolla CA 92038

South Carolina Board of Examiners in Optometry  
Synergy Business Park; Kingstree Building  
110 Centerview Dr., Suite 202  
Columbia, S.C. 29210

7/31/15

To Whom It May Concern:

This letter is to notify you that, Opternative, a company performing an on line based refraction resulting in a prescription for eyeglasses and contact lenses, is now operating in your state. While the prescriptions are being evaluated and signed by a licensed ophthalmologist in your state, the patient/user is not receiving an eye health assessment.

This creates a public health concern as many eye diseases and disorders will be missed. The company states that they will only release a prescription to those between 20 to 40 years old and only those without history of eye or systemic disease. However it is well established that many eye and systemic disorders can be diagnosed through an eye health exam, even those within this age group. Conditions such as ocular tumors and diabetes can even be detected in those with 20/20 vision. Furthermore and more alarming is the fact that the patient may not be truthful or even know their history.

Many patients, when asked about their medical conditions during an eye exam respond, "nothing that would affect my eyes", and then we as their eye care provider educate them. Most of the public will also replace this vision exam for their eye health exam because they see 20/20. But that does not equal to a healthy eye.

While, we are not against new and innovative technology, we find this format and practice harmful and detrimental to the public's eye health. Serious ocular and systemic diseases will be missed and some without early diagnosis will be at a disadvantage and add to raising healthcare costs. Some states are currently either investigating or introducing bills against this business model.

Michigan state has taken the lead in protecting their citizens and has passed the **Eye Care Protection Law; Senate Bill 853**, not allowing this practice model.

We do not see this issue that should take a wait and see approach; we believe the practice of on-line or kiosk refraction without an eye health assessment warrants further investigation and should be disallowed following Michigan's lead. While telemedicine is growing and may become commonplace, it still needs to be used responsibly and without harm to the public. We also know that most of the public receiving a spectacle or contact lens prescription may believe that this replaces their need for an eye examination by a licensed optometrist or ophthalmologist.

Enclosed is a brochure called "Eye Before See" educating and describing to patients that a healthy eye is needed in order to maintain good sight and eye or medical conditions that can be found in an otherwise healthy 20/20 individual.

We look forward to your comments and direction your State Board will be taking on this public health issue.

Sincerely,

The Optometric Society

Bryan Wolynski, O.D.  
President

Michael Santarlas, O.D.  
Vice President/Treasurer

**AUG 06 2015**

**DID YOU KNOW?**

An eye that has 20/20 vision can still have an eye disease.

Eye Disorders such as Glaucoma, Diabetic Eye Disease, Retinal Holes, Tears or Detachments & Tumors can all be found in a person with 20/20 vision, at any age.

---

**DID YOU KNOW?**

Medical problems such as Diabetes, High Blood Pressure, High Cholesterol, Neurological Disorders and Autoimmune Diseases can be found through a comprehensive eye exam even if you have 20/20 vision, at any age.

---

**DID YOU KNOW?**

Refraction, the test to determine the prescription of your eyes, is only one part of a Comprehensive Eye Exam. Without a Comprehensive Eye Exam it is not possible to make sure your eyes are healthy.

**DID YOU KNOW?**

Many Eye and Systemic Diseases, if caught early, can be treated before you experience any vision loss.

---

In order for your Eyes to See Well, you must first have Healthy Eyes.

Just because you have 20/20 Vision, does not mean you or your eyes are healthy.

Only through a comprehensive eye exam, which includes an eye health assessment, can you make sure your eyes are healthy.

---

A Refraction Alone Cannot Determine the Health of Your Eyes

**Follow the  
Eye Before See  
Rule**

Have an Eye Health Exam as part of a Comprehensive Eye Exam

Tab 7  
#1

**TAB 7 #1**

**Vision Screening Inquiry**

The Board's staff received the following inquiry from an Optometrist.

A screening was performed by volunteers in a local store where optical employees were present but no license doctors or optometrist. The screening consisted of a single photograph taken with the WelchAllyn Sport Vision Screener. A printout of the result was given to the individual with the recommendation a "Complete Eye Exam". The Board had a policy of not allowing unlicensed personnel to operate auto refractors or similarly-based technology during a vision screening. Is this policy still in effect? If so, does the Board believe that the use of the WelchAllyn Sport Vision Screener violates this policy, particularly when it is adjacent to an optometry/optical department?



South Carolina Department of Labor, Licensing and Regulation  
**South Carolina Board of Examiners in Optometry**  
 P.O. Box 11329 • Columbia, SC 29211  
 Phone: 803-896-4679 • Fax: 803-896-4719  
[www.llr.state.sc.us/POL/Optomtery/](http://www.llr.state.sc.us/POL/Optomtery/)



## OPTOMETRY JURISPRUDENCE EXAMINATION AND STATE LICENSURE BY ENDORSEMENT

*Licensure by Endorsement applicant must be currently licensed in another jurisdiction, have practiced at the therapeutic level during the preceding twelve months or twenty-four of the last thirty-six months, and is authorized by law to treat glaucoma.*

*\*Please note that if you have taken and passed all parts of the National Board of Examiners Optometry Exam, you must submit and complete the Optometry Jurisprudence Examination and State Licensure by Credentia Application. Additional requirements must be met. Additional requirements must be met.*

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

- Check or money order in the amount of \$525 payable to LLR- SC Board of Examiners in Optometry. Our office does not accept cash. Fees are non-refundable. A returned check fee of up to \$30, or an amount specified by law, may be assessed on all returned funds.
- Copy of driver's license, state issued ID or passport.
- Copy of social security card
- Legal documentation for name change (marriage cert, divorce decree, etc.), if applicable

<b>For Office Use Only</b> Check No.: _____ Amount: _____
---

**Have submitted directly to the Board:**

- Optometry school transcript from optometry school.
- License verification should be submitted from all states in which you have ever held a license to practice optometry.
- National Board of Examiners in Optometry (NBEO) examination scores report.

**Note:**

Your application is good for one (1) year from the date of receipt. If all required information is not received within this one (1) year period; you must begin the application process from the beginning. This includes, but is not limited to, the application fee, transcripts, license verifications, etc.

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

---

### APPLICANT INFORMATION

Full Name: \_\_\_\_\_ Maiden Name: \_\_\_\_\_

Home Address: \_\_\_\_\_  
(Street) (City) (State) (Zip Code)

Mailing Address: \_\_\_\_\_  
(Street) (City) (State) (Zip Code)

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

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

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

\*District: \_\_\_\_\_ Gender:  Female  Male  
Congressional District (SC Residents ONLY)

Have you ever been known by any other surname?  Yes  No If yes, list name(s): \_\_\_\_\_

**EDUCATION**

List colleges and optometry school you attended; provide dates of attendance and degree(s) received.  
*Application Requirement:* Request optometry school to submit transcript directly to the Board office.

Institution	Dates of Attendance	Degree
Institution	Dates of Attendance	Degree

**OPTOMETRIC EXAMINATION INFORMATION**

List national and state optometric examinations taken.

*\*Please note that if you have taken and passed all parts of the National Board of Examiners Optometry Exam, you must submit and complete the Optometry Jurisprudence Examination and State Licensure by Credentia Application. Additional requirements must be met.*

NBEO = National Board of Examiners in Optometry    TMOD = Treatment and Management of Ocular Disease

Have you taken and passed Part I, Part II, Part III, and TMOD of the National Board of Examiners in Optometry Exam (NBEO)?    YES    NO

\*If no, please list which Parts you have taken. \_\_\_\_\_

**LICENSURE INFORMATION**

List jurisdictions you have ever been licensed to practice in any profession or occupation. Identify the method by which you obtained your license(s), e.g., state examination, endorsement, other method.

**Application Requirement:** A verification of licensure must be directly submitted to the Board office from all states in which you have ever held a license to practice optometry.

Jurisdiction	License #	Type of License	Method License Obtained	Date of Licensure	Status

**OPTOMETRIC PRACTICE HISTORY**

List employment dates, practice names with location, and number of hours worked per week. Explain any break in practice that exceeds thirty continuous days.

FROM Month/Year	TO Month/Year	PRACTICE NAME	LOCATION	HOURS PER WEEK

**CERTIFICATION OF PRACTICE**

**Endorsement Candidate Only:** As the named applicant applying for a license to practice optometry in South Carolina I certify that I have been practicing full time as a therapeutic optometrist authorized to treat glaucoma in the State of \_\_\_\_\_ during the preceding twelve months or during twenty-four of the last thirty-six months.

**PERSONAL HISTORY**

If you answer "yes" to any questions below (1-5), you must include a written explanation with your application.

- 1. Have you been denied a license to practice optometry or any other occupation or profession in this state or any other state?  YES  NO
- 2. Is any complaint pending, under investigation, or has any action been taken against your license in any jurisdiction?  YES  NO
- 3. Currently or within the last five years, have any judgments, liens or claims been filed against you or any businesses you were either an executive officer or more than a 10% owner?  YES  NO
- 4. 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.)
  - a. If yes, attach a written explanation that includes cause, dates and disposition.  YES  NO
- 5. Do you currently have any physical, mental or emotional condition that might interfere with your ability to competently and safely perform the essential functions of practice as an optometrist?  YES  NO

**Privacy Act 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.

**AFFIDAVIT**

I, the undersigned, am the person described and identified, of good moral character, and the person named in all documents presented in support of this application for a license to practice optometry in South Carolina. I certify that all information contained in this application is truthful, complete, and accurate. I agree that all such information provided is subject to verification by the Board. Should I furnish any false or incomplete information in this application, I hereby agree that such act shall constitute the cause for denial or revocation of my license to practice in South Carolina. I hereby authorize the South Carolina Board of Examiners in Optometry or any authorized representative of them to make a complete investigation of my character and fitness to practice optometry in South Carolina and of the completeness and truthfulness of application information.

Applicant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name of Applicant: \_\_\_\_\_



## OPTOMETRY JURISPRUDENCE EXAMINATION AND STATE LICENSURE BY CREDENTIALS

*Licensure by Credentials applicant must have passed the National Board of Examiners in Optometry Parts I, II, III, and the TMOD.*

*\*Please note that if you have not taken and passed all parts of the National Board of Examiners Optometry Exam, you must submit and complete the Optometry Jurisprudence Examination and State Licensure by Endorsement Application. Additional requirements must be met.*

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

- Check or money order in the amount of \$425 payable to LLR- SC Board of Examiners in Optometry. Our office does not accept cash. Fees are non-refundable. A returned check fee of up to \$30, or an amount specified by law, may be assessed on all returned funds.
- Copy of driver's license, state issued ID or passport.
- Copy of social security card
- Legal documentation for name change (marriage cert, divorce decree, etc.), if applicable

<b>For Office Use Only</b> Check No.: _____ Amount: _____
---

**Have submitted directly to the Board:**

- Optometry school transcript from optometry school.
- License verification should be submitted from all states in which you have ever held a license to practice optometry.
- National Board of Examiners in Optometry (NBEO) examination scores report.

**Note:**

Your application is good for one (1) year from the date of receipt. If all required information is not received within this one (1) year period; you must begin the application process from the beginning. This includes, but is not limited to, the application fee, transcripts, license verifications, etc.

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

---

### APPLICANT INFORMATION

Full Name: \_\_\_\_\_ Maiden Name: \_\_\_\_\_

Home Address: \_\_\_\_\_ District: \_\_\_\_\_  
(Street, City, State & Zip Code) Congressional District (SC Residents Only)

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

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

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

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

Gender:  Female  Male Have you ever been known by any other surname?  Yes  No

If yes, list name(s): \_\_\_\_\_

**EDUCATION**

List colleges and optometry school you attended; provide dates of attendance and degree(s) received.  
*Application Requirement:* Request optometry school to submit transcript directly to the Board office.

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Institution	Dates of Attendance	Degree

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List national and state optometric examinations taken.

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NBEO = National Board of Examiners in Optometry    TMOB = Treatment and Management of Ocular Disease

Have you taken and passed Part I, Part II, Part III, and TMOB of the National Board of Examiners in Optometry Exam (NBEO)?  YES     NO

**LICENSURE INFORMATION**

List jurisdictions you have ever been licensed to practice in any profession or occupation. Identify the method by which you obtained your license(s), e.g., state examination, endorsement, other method.

**Application Requirement:** A verification of licensure must be directly submitted to the Board office from all states in which you have ever held a license to practice optometry.

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List employment dates, practice names with location, and number of hours worked per week. Explain any break in practice that exceeds thirty continuous days.

FROM Month/Year	TO Month/Year	PRACTICE NAME	LOCATION	HOURS PER WEEK

## PERSONAL HISTORY

If you answer "yes" to any questions below (1-5), you must include a written explanation with your application.

1. Have you been denied a license to practice optometry or any other occupation or profession in this state or any other state?  YES  NO
2. Is any complaint pending, under investigation, or has any action been taken against your license in any jurisdiction?  YES  NO
3. Currently or within the last five years, have any judgments, liens or claims been filed against you or any businesses you were either an executive officer or more than a 10% owner?  YES  NO
4. 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.)
  - a. If yes, attach a written explanation that includes cause, dates and disposition.  YES  NO
5. Do you currently have any physical, mental or emotional condition that might interfere with your ability to competently and safely perform the essential functions of practice as an optometrist?  YES  NO

### Privacy Act 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.

### AFFIDAVIT

I, the undersigned, am the person described and identified, of good moral character, and the person named in all documents presented in support of this application for a license to practice optometry in South Carolina. I certify that all information contained in this application is truthful, complete, and accurate. I agree that all such information provided is subject to verification by the Board. Should I furnish any false or incomplete information in this application, I hereby agree that such act shall constitute the cause for denial or revocation of my license to practice in South Carolina. I hereby authorize the South Carolina Board of Examiners in Optometry or any authorized representative of them to make a complete investigation of my character and fitness to practice optometry in South Carolina and of the completeness and truthfulness of application information.

Applicant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name of Applicant: \_\_\_\_\_



## **ELECTRONIC CONTINUING EDUCATION MONITORING SYSTEM**

### **OBJECTIVES:**

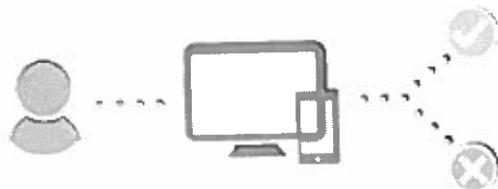
- **Increase continuing education compliance**
- **Obtain 100% continuing education audit of South Carolina licensees that are required to complete continuing education**
- **Simplify continuing education auditing for Board administration**
- **Reduce the resources used to complete an audit and other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

# 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!



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.



# 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.

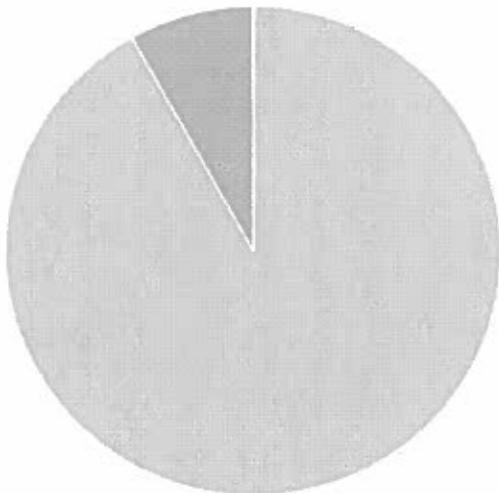
Home > Communication Center > Audit Dashboard

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:** 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

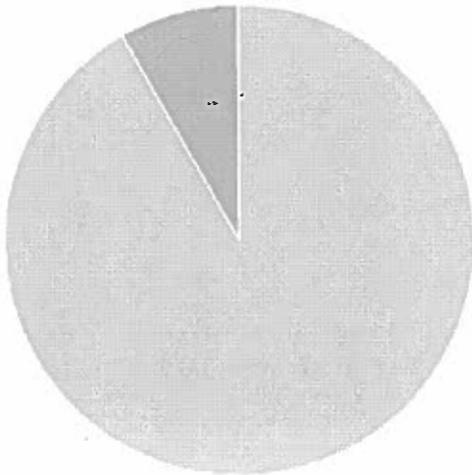
91.84% Compliant

0.00% No Status

**Audit Dashboard**

Board:  ▼  
 Profession:  ▼  
 Timeframe:  ▼

**Transcript Status**



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

**Audit Summary**

49 total selected for audit  
**Activity Report:** 91.84% Active  
 16.37% 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

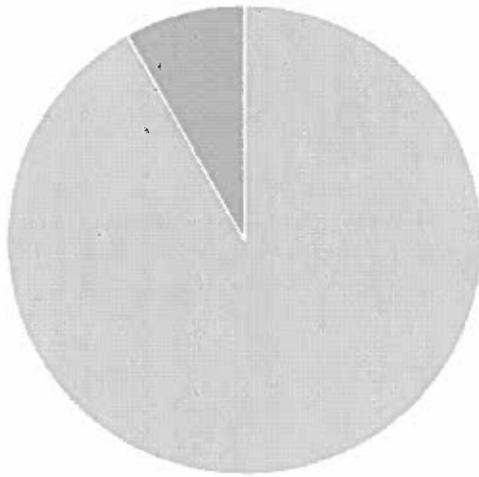
**Transcript Report [Complete]**

License #	Last Name	First Name	Email	Activity Status	Transcript Status	Workflow Status	Compliance Status
<a href="#">A.00126</a>	BEFEZIN	NARCIA		Active	100%	Review Complete	✓
<a href="#">A.00693</a>	BLANAR	CAROL	[REDACTED]	Active	100%	Review Complete	✓
<a href="#">A.00559</a>	BOOPER	SHERYL	[REDACTED]	Active	100%	Review Complete	✓
<a href="#">A.00531</a>	BOLBIN	FELICIA	[REDACTED]	Active	100%	Review Complete	✓
<a href="#">A.00375</a>	BOYER	PALLINE	[REDACTED]	Active	100%	Review Complete	✓
<a href="#">A.01753</a>	BRANFAN	ALDRA	[REDACTED]	Active	100%	Review Complete	✓
<a href="#">A.00256</a>	BROSINS	MICHELE	[REDACTED]	Active	100%	Review Complete	✓
<a href="#">A.00177</a>	BURLEY	ROBERT		Active	100%	Review Complete	✓

**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:** 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

**Transcript Report [Incomplete]**

[Export Current View](#)

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_01611</a>	HOLDERMAN	KRISTA		Active	55%	Review Complete	✘ ▲ ✓
<a href="#">A_00981</a>	SCHUNEMAN	JOHN		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
XCV2XCV	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](#)

RN99999999

Registered Professional Nurse -  
Georgia

04/30/2014 - 04/30/2016

Georgia



[License / Certification](#)

Welcome, Jane Doe  
Professional Account Dashboard

Renewal Transcripts

CE Compliance Status Complete

View My Transcript Report CE Hours

RN99999999 04/30/2014 - 04/30/2016  
Registered Professional Nurse Georgia



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Welcome, Jane Doe  
Professional Account Dashboard

Renewal Transcripts

**+** 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 Transcripts

Report CE Hours

01/30/2014 - 04/30/2016  
Registered Professional Nurse - Georgia

+

Download Certificate

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**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	01/01/2014
Test	01/01/2014

Hours Required	Hours Posted	Hours Needed
30	30	0
	30	
Total Hours:		
30	30	0

Welcome, Jane Doe  
Professional Account Dashboard

Renewal transcripts

Compliance Status

View My Transcripts

Report CE Hours

01/01/2015 - 01/31/2015  
Registered Professional Nurse  
Georgia



# 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 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](#)

ME999999999  
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>	2	9	0
EXAMPLE COURSE		2	
12/31/2014			
Cool		4	
Excess Hours not applied: 4			
01/01/2016			
Cool name		3	
Excess Hours not applied: 3			
01/01/2016			
<b>General (AMA Category I)</b>	36	48.25	0
MEDICINE		2	
01/26/2015			
2015 FAPP FAMILY MEDICINE SPRING FORUM GENERAL SESSION		20.75	
04/26/2015			
Excess Hours not applied: 4.25			
MAYO CLINIC LIVE		1	
08/09/2015			
Excess Hours not applied: 1			
Cool		4	
01/01/2016			
Excess Hours not applied: 4			
Cool name		3	
01/01/2016			
Excess Hours not applied: 3			
Cool		4	
01/01/2016			
Cool name		3	
01/01/2016			
name		3	
01/01/2016			
Cool name		3.5	
01/01/2016			
Cool		4	
01/01/2016			
<b>Domestic Violence</b>	2	10	0
Cool		4	
01/01/2016			
Excess Hours not applied: 4			
Cool name		3	
01/01/2016			
Excess Hours not applied: 3			
MAYO LIVE EVENT		3	
06/23/2015			
Excess Hours not applied: 1			
<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
<b>Medical Doctor</b>	
Domestic Violence (AMA Category I)	<b>3</b>

# Course Search

Medical Doctor

1 Course Type

2 Search Criteria

3 Review Results

Review Results

Criteria OPEN ▾

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."

Refine Search

Sort By: Random ▾

Display: 20 ▾

Response time: 1.2 seconds

Page 1 Next >

Course Name / Educational Provider	Delivery Method	Total Hours		Save
PL VOICES - CLINICAL RECOMMENDATIONS MAY ... PRESCRIBER'S LETTER/THERAPEUTIC RESEARCH CENTER	Home Study	1	Contact Provider	<input type="radio"/>
MINDFULNESS AND PSYCHOTHERAPY WITH SON ... 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@cebroker.com



Call us at

1-877-434-6323



LiveChat with an expert

Live chat now

Follow Us





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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Website: www.foma.org

EXECUTIVE DIRECTOR

STEPHEN R. WINN

LEGAL COUNSEL

JASON D. WINN, ESQ.

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*

Stephen R. Winn  
Executive Director

## MEMORANDUM

DATE: January 14, 2016

SUBJECT: Call for comments on second draft of proposed revisions to ACOE Professional Optometric Degree Program Standards

TO: Deans and Presidents of Schools and Colleges of Optometry; Directors of Optometric Residencies; Supervisors of Optometric Residencies; Directors of Optometric Technician Programs, ACOE Consultants, Presidents of Institutions offering Professional Optometric Degree Programs; AOA O, T, ED, AED, GC; Executive Committees and Directors of ARBO, AAO, NBEO, and AOSA; AOSA Trustees; ASCO Executive Director; President and EDs of State Optometric Associations; State Board Secretaries; Director of the VA Optometry Service; Military and Public Health Optometric Service Chiefs; ASPA Members, Board and Executive Director; CHEA Board and Executive Director; Regional Accreditors; USDE staff; Chronicle of Higher Education

FROM: J. Bart Campbell, O.D., ACOE Chair

DIST: ACOE, ACOE Staff

At its October 30-November 1, 2015 Fall Meeting, the Accreditation Council on Optometric Education (ACOE) accepted the second draft of the professional optometric degree standards for distribution to the community of interest for comment. The ACOE welcomes any interested party to submit written comments concerning these proposed standards **by no later than February 15, 2016**. Please submit any comments you might have concerning the attached draft to:

Joyce Urbeck  
ACOE Director  
243 N Lindbergh Blvd Floor 1  
St. Louis, MO 63141--7881  
FAX: 314-991-4101  
Email: [accredit@aoa.org](mailto:accredit@aoa.org)

The first draft of the ACOE standards were distributed for comment in August, 2015, and the ACOE considered the comments made by interested parties. The feedback received was considered in the preparation of the second draft of the standards.

The ACOE will review the input received from this call for comments and consider it at the ACOE Winter Meeting on February 19-21, 2016. At that time, the Council will determine whether the standards are ready to be adopted, or if significant changes are made, a third draft will be distributed with another call for comments. The ACOE is committed to obtaining as much feedback as is useful in developing standards that best reflect attributes of a professional optometric degree program designed to meet the needs of the public. When the standards are adopted, a date when the new standards become effective will be set.

The [ACOE web site](#) includes the [current accreditation standards](#), which were put into place in 2009 as well as the [first draft](#) of the proposed revisions to the standards provided in the first call for comments.

The Council will welcome input from any interested party regarding the following proposed standards. Following the ACOE Winter Meeting, we will keep you informed of actions taken.

## **SECOND DRAFT-- Proposed Professional Optometric Degree Standards**

*Accepted at the October 30-November 1, 2015 Fall Meeting by the Accreditation Council on Optometric Education (ACOE) for distribution as a call for comments following ACOE review of comments received on the first draft.*

### **Standard I – Mission, Goals and Objectives**

- 1.1 The program must have a statement of its mission, and the goals and objectives by which it intends to fulfill its mission.

*Examples of Evidence*

- *Program's mission, goals and objectives*

- 1.1.1 The program must publish its mission and goals so that the information is readily and publicly available on the program's website.

*Examples of Evidence*

- *Web site*

- 1.1.2 The goals and objectives must include teaching and learning, research or scholarly activity, patient care, and service.

*Examples of Evidence*

- *Program's goals and objectives*

- 1.2 The mission, goals, and objectives must result in a professional optometric degree program whose graduates possess the attributes, knowledge, skills, and ethical values required for independently practicing contemporary optometry.

*Examples of Evidence*

- *Program's statement of attributes, knowledge, skills and ethical values*

- 1.3 The program must identify and use outcomes measures to evaluate its effectiveness by documenting the extent to which its goals and objectives have been met, and must use such assessment to improve its performance. Such measures should include but not be limited to graduation rates, results from National Board of Examiners in Optometry (NBEO) or Canadian Assessment of Competency in Optometry (CACO) or equivalent testing agencies, licensing examination results and career placement.

### *Examples of Evidence*

- *Outcomes measures including but not limited to*
  - *Graduation rate*
  - *NBEO Scores*
  - *CACO Scores*
  - *Licensing examination results*
  - *Career Placement, i.e. proportion of graduates employed, enrolled in a residency, or pursuing further education in optometry or a related field*
- *Analysis of outcomes measure*
- *Description of actions taken as a result of analysis*

1.3.1 Within six years of initial matriculation, at least 80% of entering students must be (1) licensed to practice optometry, or (2) pass all three parts of the NBEO or (3) pass the equivalent Canadian registration examination.

### *Examples of Evidence*

- *Outcomes measures used including but not limited to*
  - *NBEO scores*
  - *NBEO ultimate pass rates for entering cohorts*
  - *CACO scores*
  - *Licensing examination results*
  - *Licensure data on graduates*
  - *Career placement*
- *Analysis of outcomes measure*
  - *Description of actions taken as a result of analysis*

1.4 The program must publish on its website current and reliable information on its performance with respect to student achievement. Data must include, but not be limited to graduation rates, attrition rates, passage rates on NBEO, CACO or equivalent examinations, and career placement.

### *Examples of Evidence*

- *Published performance measures*
  - *Graduation rate, i.e. four and five year program completion rates for each of the three most recent graduating classes*

8.3 The program must provide eye and vision care services, which are consistent with accepted and well-established health care standards such as clinical practice guidelines.

*Examples of Evidence*

- *Adopted clinical practice guidelines*
- *Description of access to clinical practice guidelines*
- *Quality assurance program*

- *Attrition rates for each of the three most recent calendar years, i.e. proportion of students leaving the program for academic or other reasons*
- *First time pass rate for each part of the NBEO exam and ultimate pass rate for each cohort graduating within each of the three previous academic years*
- *Career placement*

1.5 The program must engage in an ongoing, systematic process of planning and self-study and must review on a regular basis its program mission, goals, and objectives and revise them as necessary.

*Examples of Evidence*

- *Description of review process*
- *Evidence of involvement of stakeholders*
- *Supporting documents from review, such as meeting agenda or minutes*
- *Documents which show actions taken with regard to mission, goals and objectives*

**Standard II – Curriculum**

2.1 The optometric curriculum must fulfill the intent of the mission statement of the program to prepare graduates to independently practice contemporary optometry.

*Examples of Evidence*

- *Copy of curriculum*
- *Curricular learning objectives*
- *Clinical competencies*
- *Course learning objectives*
- *Relevant educational outcome measures*

2.2 The program must offer an optometric curriculum of at least four academic years.

*Examples of Evidence*

- *Copy of curriculum*

2.3 Each student's achievement of curricular outcomes must be assessed.

*Examples of Evidence*

- *Course examinations*
- *Laboratory practical examinations*
- *Clinical evaluations*
- *Pre- and post-clinical assessments (proficiency examinations)*
- *Course grades*

2.4 The program must employ a curriculum management plan that includes:

- a. ongoing curriculum review and evaluation processes that include input from faculty, students, administration and other appropriate stakeholders; and
- b. evaluation of all courses with respect to the defined objectives of the program.

*Examples of Evidence*

- *Minutes of meetings in which curriculum is evaluated*
- *Description of actions taken as a result of curricular evaluations*
- *Student assessment of courses and instruction*
- *Defined program competencies*
- *Course syllabi including learning objectives*

2.5 If instruction in the optometric program is shared with another program or institution, the optometric program must demonstrate primary administrative responsibility for the creation, supervision and implementation of its curriculum.

*Examples of Evidence*

- *Documents delineating responsibilities in shared programs*

2.6 Basic science instruction must provide a foundation of knowledge in physical, biomedical and behavioral sciences essential for clinical optometric care.

*Examples of Evidence*

- *Copy of curriculum*
- *Results from Part I of NBEO*

- *Results from CACO*
- *Outcome assessment relative to curricular objectives*

2.7 Clinical instruction and practice must consist of didactic, laboratory, and supervised clinical experience in the examination, diagnosis, treatment, and management of patients.

*Examples of Evidence*

- *Copy of curriculum*
- *Results from Part II and III of NBEO*
- *Results from CACO*
- *Outcome assessment relative to curricular objectives*

2.7.1 Externship rotations must complement, but not substitute for, the foundational clinical experiences and must occur at sites that fulfill the requirements of Standard VIII.

*Examples of Evidence*

- *Learning objectives of externship sites*
- *Learning objectives of the core clinical experience*

2.8 The quantity, quality and variety of experiences in the supervised care of patients must be sufficient to develop clinical competency to independently practice contemporary optometry.

2.8.1 The number of patients seen, as well as diagnoses for each of these patients, must be tracked and documented for each student. These data must distinguish between encounters in which supervised patient care was provided by one student, encounters in which supervised patient care was rendered by more than one student, and encounters in which the experience was by observation only.

*Examples of Evidence*

- *Description of clinical experience for each individual student*
- *Description of processes used to measure quantity, quality and variety of experiences*

- *Patient logs and an analysis of logs*
- *Student portfolio of clinical experience*

2.9 The program must establish a set of clinical competencies necessary for the contemporary practice of optometry and evaluate the student's attainment of these competencies.

*Examples of Evidence*

- *Description of clinical competencies*
- *Completed medical record reviews*
- *Faculty evaluation of clinical performance*
- *Referral letters and other communications*
- *Course and clinical learning objectives*

2.9.1 The graduate must be able to identify, record and analyze pertinent history and problems presented by the patient.

2.9.2 The graduate must be able to examine and evaluate the patient to arrive at an appropriate diagnosis.

2.9.3 The graduate must be able to formulate a rational treatment and management plan and understand the implications of various treatment and management options.

2.9.4 The graduate must be able to provide preventive care, patient education and counseling.

2.9.5 The graduate must be able to use the knowledge of optometry's role and the roles of other health professions to appropriately assess and address the health care needs of the patients and populations being served.

2.9.6 The graduate must be able to apply knowledge of professional, ethical, legal, and public health principles to the delivery of optometric care.

2.9.7 The graduate must be able to demonstrate understanding of research principles and conduct in order to critically assess the literature.

2.9.8 The graduate must be able to effectively communicate orally and in writing with other professionals and patients.

2.9.9 The graduate must be able to demonstrate basic life support skills for emergencies encountered in optometric practice.

2.9.10 The graduate must demonstrate an understanding of the basic principles and philosophy of optometric practice management.

2.10 There must be written and signed affiliation agreements between the program and its externship sites that define, at a minimum, the responsibilities of each party related to the educational program for optometry students.

*Examples of Evidence*

- *Copy of affiliation agreements*

2.10.1 The program must establish and adhere to criteria for the selection of externship sites. These criteria must address at a minimum:

- Space and equipment
- Qualifications of supervising faculty
- Clinical privileges of supervising faculty where applicable
- Clinical practice guidelines employed at the site

*Examples of Evidence*

- *Copy of criteria for selection*
- *Copy of site selection procedure*

2.10.2 The program must monitor externship sites to ensure they are providing clinical experiences that meet the program's mission, goals, and objectives

2.10.2.1 Each site must be visited by program personnel on a periodic basis.

2.10.2.2 Program approved learning objectives must be established for all externship sites, and student performance must be evaluated using these objectives.

*Examples of Evidence*

- *Description of monitoring procedure*
- *Student assessments of externship sites*
- *Administrative structure to monitor sites*
- *Analysis of clinical experience provided at sites*

2.10.3 The program must provide educational direction, including orientation, training and development, to the externship sites.

*Examples of Evidence*

- *Externship manual*
- *Description of in-service programs, training and other educational guidance provided to externships*

### **Standard III - Research and Scholarly Activity**

3.1 The program must support, encourage and maintain research and scholarly activity.

*Examples of Evidence*

- *Policies that encourage research and scholarly activity*
- *Financial support*
- *Internal grant programs*
- *Description of research facilities*
- *List of faculty publications*
- *List of current grants and contracts*
- *Program infrastructure support (e.g. grant writing, biostatistics, graphics, technology)*
- *Mentoring and training opportunities*

3.2 The program must provide opportunities for qualified students to participate in research and other scholarly activities mentored by faculty.

*Examples of Evidence*

- *Relevant course syllabi*
- *Samples of research projects in which students participated*
- *Samples of other scholarly activities in which students participated*

**Standard IV – Governance, Regional Accreditation, Administration, and Finances**

4.1 The doctor of optometry program must be offered by an autonomous unit organized as a school or college of optometry (within a university or as an independent entity.) This includes autonomy to manage the professional program within published policies and procedures, as well as applicable state and federal regulations.

*Examples of Evidence*

- *Appointment letter for program's chief executive officer*
- *Board of Trustees policies*
- *Administrative policies*
- *Organizational Chart*
- *Position descriptions of key administrators*

4.1.1 The program must adhere to written policies, including, but not limited to, conflict of interest, due process, disclosure, non-discrimination, confidentiality of records and fiscal accountability.

*Examples of Evidence*

- *Board of Trustees Policies*
- *Administrative policies*

4.1.2 The program must be conducted and organized in such a way as to facilitate open communication among administrators, faculty, students, staff and other constituencies.

*Examples of Evidence*

- *Program bylaws*
- *Organizational chart*
- *Surveys of constituents*
- *Communications among constituents*
- *Meeting minutes*
- *Electronic communications*

4.1.3 The institutional structure must clearly assign authority and responsibility for the hiring, on-going evaluation, retention and discharge of the program's chief executive officer.

*Examples of Evidence*

- *Board of Trustees policies*
- *Appointment letter*
- *Organizational chart*
- *Governance policies*
- *Evaluation instrument or procedures*

4.2 The program must be conducted at an institution that is accredited by a regional accrediting body recognized by the U.S. Department of Education or is recognized by a provincial ministry of education in Canada.

*Examples of Evidence*

- *Letter of institutional accreditation*
- *Institutional accreditation report*

4.3 The program's chief executive officer or chief academic officer must have a professional optometric degree, and both must be qualified by education, training and experience to provide leadership in optometric education, scholarly activity, and patient care.

*Examples of Evidence*

- *Curriculum vitae*
- *Copy of transcript*
- *Copy of diploma*
- *Description of process to verify credentials*

4.4 There must be a clear definition of the chief executive officer's authority and responsibility for the program.

4.4.1 The program's chief executive officer must have the authority and responsibility for fiscal management of the program.

*Examples of Evidence*

- *Position description*
- *Administrative policies*

4.5 The program must utilize clearly defined reporting relationships, performance expectations, and assessment procedures for all administrators.

*Examples of Evidence*

- *Organizational chart*
- *Administrative policies*
- *Documentation or narrative describing performance and assessment procedures*

4.6 The program must demonstrate that it possesses the financial resources required to develop and sustain the program on a continuing basis and to accomplish its mission, goals and objectives.

*Examples of Evidence*

- *Applicable financial and/or budgetary documents*
- *Analysis of historical financial resources*
- *Projection of financial resources*

4.6.1 The program must utilize sound and generally accepted financial management procedures to assure effective monitoring, control and accountability of its fiscal resources.

*Examples of Evidence*

- *Most recent audited financial statement*
- *Administrative policies and procedures*

## **Standard V – Faculty**

5.1 The number, qualifications, expertise and experience of faculty members must be sufficient to meet the stated mission and goals of the program.

### *Examples of Evidence*

- *Description of faculty rank classifications (i.e., associate, assistant, professor, clinical associate, etc.) with description of expected workload and expected contributions.*
- *Census of the faculty by classification*
- *Description of significant changes in faculty census and student-faculty ratio over the accreditation period.*
- *Curricula vitae of faculty*
- *Workload formula and implementation grid by semester (demonstrating application of policy referenced in standard 5.5)*
- *List of faculty teaching responsibilities*

5.1.1 Faculty members must hold an earned terminal degree or first professional degree from an institution accredited by a recognized agency or its foreign equivalent or have certification or licensure related to their primary instructional assignment.

### *Examples of Evidence*

- *List of faculty members with abbreviated biographies and teaching responsibilities*
- *Copies of faculty CVs (on-site)*
- *Description of process to verify faculty credentials*

5.2 The program must demonstrate an effective mechanism for faculty participation in decision-making related to the optometric education program.

### *Examples of Evidence*

- *A list of faculty committees and membership*
- *Schedule of faculty meetings in past two years*
- *Minutes of faculty meetings in past two years (on-site)*
- *Faculty charter, bylaws, contract, standard operating procedure, etc.*

- *Description of faculty committee structure, membership, objectives, reporting procedures*
- *Meeting schedules and minutes*
- *Evidence of governance issues resolved or identified by the faculty process (i.e. agendas, minutes, formal letters, white papers, votes)*

5.3 The program must allocate adequate time and resources for faculty to enhance their skills and leadership abilities in education, service, research and scholarly activity, and patient care.

*Examples of Evidence*

- *Description of how faculty workload is determined*
- *Description of development programs*
- *Sabbatical policies*
- *Faculty technology support*
- *Description of orientation and mentoring programs*

5.4 The program must use a faculty evaluation process that establishes goals and assesses performance of each faculty member.

*Examples of Evidence*

- *Policy and procedure manuals*
- *Template of evaluation instruments*

5.5 The program must follow published policies and procedures for faculty recruitment and retention, promotion, tenure (where it exists), academic assignments and responsibilities, sabbaticals, reporting relationships, grievance, and benefits.

*Examples of Evidence*

- *Workload policy*
- *Organizational chart*
- *Procedure and policy manuals*

5.6 The program must demonstrate its efforts to recruit a diverse faculty.

*Examples of Evidence*

- *Announcement and publication of open positions*
- *Recruitment plans*

### **Standard VI – Students**

6.1 The program must have a fair and impartial process that results in the admission of students who possess the intelligence, integrity, and maturity necessary for them to become competent doctors of optometry.

#### *Examples of Evidence*

- *Historical admissions statistics including*
  - *Number of applicants*
  - *Profile of entering class with details on*
    - *Gender*
    - *Academic ranking/attributes*
      - *Average OAT scores*
      - *Average GPAs*
    - *Racial/ethnic information*
- *Recruitment materials*
- *Recruitment plan*
- *Admission policy*
- *Attrition rates*
- *NBEO results*
- *CACO results*
- *Four year graduation rate*

6.2 The program must establish and publish the criteria considered in selecting students who have the potential for success in the program and the profession.

#### *Examples of Evidence*

- *Examples of publications*
  - *Catalog*
  - *Web site*
- *Admissions criteria*

- *Pre-requisites*
- *Admissions test scores*
- *GPA's*
- *Interview*
- *Essays*
- *Letters of reference*
- *Deadlines for submission*
- *Application fees*

6.2.1 The program must adhere to fair and impartial policies and procedures during the admissions process.

*Examples of Evidence*

- *Admission policy, criteria and procedure*

6.2.2 The program must require that the accepted applicants have completed all prerequisites and at least an equivalent of three academic years of postsecondary education in an accredited institution prior to beginning the program.

*Examples of Evidence*

- *Admission policy, criteria and procedure*
- *Catalog*
- *Student records*

6.3 The program must provide information to incoming students regarding pre-matriculation health standards, access to health care, personal counseling, and standards for immunization against infectious disease.

*Examples of Evidence*

- *Publications that describe the above*

6.4 There must be an institutional commitment to serving students, including an organizational element devoted to student affairs.

*Examples of Evidence*

- *Organizational chart*
- *Description of duties of element devoted to student affairs*

- *Position descriptions of personnel in student affairs*

6.4.1 At a minimum, student services must include financial aid and debt counseling, academic counseling, learning support services, career placement assistance, and access to information technology support.

*Examples of Evidence*

- *Organizational chart*
- *Position description of personnel in student affairs*
- *Student handbook*
- *Web site*

6.5 The program must maintain an orderly, accurate, confidential, secure and permanent system of student records.

*Examples of Evidence*

- *Policies on student record access*

6.6. The program's publications, written policies, advertising, and student recruitment must present an accurate representation of the program.

*Examples of Evidence*

- *Publications, written policies, advertising, Web sites*

6.6.1 The program must publish and adhere to policies and procedures on academic and professional standards, grading, attendance, disciplinary ~~conduct~~-actions, retention, dismissal and reinstatement, non-discrimination policy, due process, academic calendar, tuition, fees, refund policy, honors, scholarship and awards, and other related matters.

*Examples of Evidence*

- *Documents that describe above*
  - *College catalog*
  - *Student handbook*
  - *Web site*
  - *Honor code*

6.6.2 The program must publish and adhere to policies and procedures regarding student grievances and must maintain records of receipt, investigation, adjudication and resolution of such complaints.

*Examples of Evidence*

- *Documents that describe above*
  - *College catalog*
  - *Student handbook*
  - *Web site*
- *Record of complaints (on site)*

6.7 The program must provide opportunities for students to access and communicate with faculty and administrators of the program.

*Examples of evidence*

- *Faculty and administration office hours*
- *Agenda, minutes, and/or reports of organized meetings between administration and students.*

6.8 The program must provide opportunities for students to participate in student governance, advocacy and other leadership development activities.

*Examples of Evidence*

- *Student governance documents*
- *Organizational structure of student/school interactions*
- *List of student committees*
- *Student involvement in program committees*

6.9 The program must make available to students information on postgraduate educational programs, such as residencies, graduate degrees and fellowship training opportunities.

*Examples of Evidence*

- *Publications that provide information on the above*

7.1 The teaching and patient care facilities and equipment must be appropriate to fulfill the mission, goals and objectives of the program.

*Examples of Evidence*

- *Documents or narrative description of physical plant, and its utilization*
- *Floor plan of facilities*
- *Documents or narrative description of any planned changes in facilities*
- *Documentation or current description of equipment relative to quantity, condition and currency*
- *Documentation of facility certification by external agencies*
- *Classroom technology*

7.1.1 The program must plan and provide for the repair, maintenance and replacement of physical facilities, ophthalmic instruments and other equipment, and computers and other technology infrastructure.

*Examples of Evidence*

- *Replacement policies and schedule*
- *Description of available financial resources for equipment repair and replacement*
- *Description of personnel and facilities for equipment and physical facility maintenance and repair*
- *Plans for renovation or acquisition of facilities*
- *Equipment acquisition plans*

7.2 The program must provide access to well-maintained library, study space and information facilities, sufficient in size, breadth of holdings, and information technology to support the program's education and other missions.

*Examples of Evidence*

- *List of library holdings*
- *Library floor plan*
- *Electronic information resources*
- *Description of Information Technology (IT)*
  - *IT support services*

- *Computer and IT resources*

7.3 The library and information services staff must support the needs of the faculty, residents and students of the program.

*Examples of Evidence*

- *Hours of library service*
- *Organizational chart for library and information services*
- *Curriculum vitae for key information resources personnel*
- *Information resource services available*
- *Surveys of patron satisfaction and use*
- *Summary of training provided to faculty, students and staff regarding utilization of library and information services*

7.4 The program must have an emergency preparedness plan.

*Examples of Evidence*

- *Emergency preparedness plan.*

### **Standard VIII – Clinic Management and Patient Care Policies**

8.1 The program must have or be assured the use of a clinical patient care program sufficient to fulfill the mission, goals and objectives.

*Examples of Evidence*

- *Description of institution's clinical patient care program*
- *Description of affiliated clinical patient care programs*
- *Description of patient demographics*

8.1.1 The clinical patient care program must include an integrated teaching clinic primarily staffed by faculty members who are employed by the program.

8.2 A coordinated system of clinical governance, administration, management and evaluation must be in place for clinics managed by the program.

*Examples of Evidence*

- *Clinic administration organization chart*
- *Description of clinic administration*
- *Clinic management policies*
- *Procedures for evaluating clinic administrators*
- *Procedures for evaluating effectiveness of clinical operation*
- *Position description(s) for principal administrators of clinical program*

8.2.1 The program must publish and make available to staff, student clinicians, residents and faculty, a clinic manual which includes all clinic policies and procedures.

*Examples of Evidence*

- *Clinic manual*
- *Electronic clinic manual*

8.2.2 The program must verify credentials of faculty members who serve in the clinic.

*Examples of Evidence*

- *Faculty credentials*
- *Credentialing process*

8.2.3 The program must define the scope and extent of clinical privileges for each faculty member who serves in the clinic.

*Examples of Evidence*

- *Description of procedures to grant clinical privileges*
- *Completed privileging documents*

8.2.4 The patient record must allow for efficient review of the patient's condition and any pertinent previous care that has been provided at the program's clinical facility.

*Examples of Evidence*

- *Copies of written or electronic patient records (on-site)*

8.2.5 The clinic must conduct a continuous quality assessment, improvement and compliance program that provides for remediation when deficiencies are identified.

*Examples of Evidence*

- *Description of quality assessment program*
- *Evaluation of clinic services by staff, patients or students*
- *Examples of remediation of deficiencies*
- *Description of faculty/staff/student in-service programs*

8.2.6 The clinic must publish or post policies and procedures on the patient's rights and responsibilities.

*Examples of Evidence*

- *Posted patient bill of rights*
- *Handouts which include patient bill of rights*
- *Publication which include patient bill of rights*
- *Informed consent documents*

8.2.7 The clinic must have written procedures for receiving and resolving patient complaints, grievances and appeals.

*Examples of Evidence*

- *Documents with relevant policies*
- *Files of complaint, grievances and appeals since the most recent site visit (on site)*
- *Clinic manual*

8.2.8 Clinic programs must utilize established procedures to address risk management such as liability, security and safety.

*Examples of Evidence*

- *Liability policies including professional liability*
- *Security policies*
- *Safety policies*
- *Emergency procedures*
- *Infection control policies*

**S. 1016**

**STATUS INFORMATION**

General Bill

Sponsors: Senators Cleary, Jackson, J. Matthews, Campbell, Davis, Scott and Turner  
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 22, 2016 at 10:51 AM

## TAB 7 #8

### 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

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~~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\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> )

View the latest [legislative information](#) at the website

**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.

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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:** tony vanalstine  
**Sent:** Saturday, December 12, 2015 8:57 AM  
**To:** Angie Combs  
**Subject:** South Carolina Chapter of the American Academy of Optometry  
**Attachments:** SC Chapter Approval Letter.pdf

**\*\*\* 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.**

Hi Angie,

You may recall how we spoke on the phone about the new South Carolina Chapter of the American Academy of Optometry. We were approved by the national board of directors of the AAO and I've attached our approval letter to this email. We spoke about how we are a non-profit organization and are planning to have CE meetings for the optometrists of South Carolina. You said that CE provided by us should fall in the unlimited category and offered to have the board give me an official statement as such. Could you please present the attached letter to the board and get me a written statement that our CE would fall in the unlimited category? I want to avoid any confusion for optometrists who come to our CE meetings. Please call me if you have any questions at 704-685-3958.

Thanks very much,  
Anthony Van Alstine OD, MS, FAAO, FSLs  
Clinical Externship Program Co-coordinator  
WJB Dorn VAMC Columbia SC

**Missy Jones**

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**From:** tony vanalstine [tony.vanalstine@gmail.com]  
**Sent:** Saturday, December 12, 2015 2:52 PM  
**To:** Angie Combs  
**Subject:** South Carolina Chapter of the American Academy of Optometry

**\*\*\* 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.**

Angie,

I also should have mentioned in my first email that the SC Chapter is in the process of becoming an ARBO administrator and all of the CE courses and events we provide will be COPE approved. Our first meeting will be June 4th 2016.

Thanks,

Dr. Van Alstine

## Missy Jones

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**From:** Missy Jones  
**Sent:** Thursday, January 14, 2016 10:01 AM  
**To:** 'state@thestate.com'  
**Subject:** South Carolina Board of Optometry

**Importance:** High

Pursuant to requirements of the Freedom of Information Act 593, this is to advise that the Board of Examiners in Optometry will hold a Meeting February 10, 2016, beginning at 3:00 p.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)



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## Missy Jones

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**From:** Missy Jones  
**Sent:** Thursday, January 14, 2016 10:18 AM  
**To:** 'tony vanalstine'  
**Subject:** South Carolina Board of Optometry  
**Attachments:** Licensee List Order Form.pdf

Dr. Van Alstine,

Per our conversation this morning the next Optometry Board meeting is on February 10, 2016 at 3:00 p.m., Kingstree Building of the Synergy Business Park, 110 Centerview Drive, Suite 204, Columbia, SC. I look forward to meeting you and working with you on approving your CE Course approval with the Board.

Please complete and return the attached Statement of Compliance to the SC Board of Optometry, P.O. Box 11329, Columbia, SC 29211, with a check or money order for \$10.

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.***

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**Missy Jones**

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**From:** Dottie Buchanan  
**Sent:** Friday, January 22, 2016 4:56 PM  
**To:** Dean Grigg; April Koon; Missy Jones  
**Cc:** Holly Beeson  
**Subject:** S. 1016 - Eye Care Consumer Protection Law

We are tracking the following bill. South Carolina Board of Examiners in Optometry is mentioned in Section 44-45-10.

**S. 1016**

**STATUS INFORMATION**

General Bill

Sponsors: Senators Cleary, Jackson, J. Matthews, Campbell, Davis, Scott and Turner  
Document Path: I:\council\bills\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> )

View the latest [legislative information](#) at the website

**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.

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- (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 22, 2016 at 10:51 AM

Dottie Mattox Buchanan, APM  
FOIA and Governmental Affairs Coordinator  
Records Management Supervisor

Office of Communications and Governmental Affairs  
South Carolina Department of Labor, Licensing and Regulation  
Post Office Box 11329, Columbia, SC 29211  
Email: [Dottie.Buchanan@llr.sc.gov](mailto:Dottie.Buchanan@llr.sc.gov) | Website: [www.llr.sc.gov](http://www.llr.sc.gov)  
Phone: 803-896-0239 | Fax: 803-896-4393



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