

NACÔR



National Alliance of Canadian Optician
Regulators

**GUIDELINES FOR THE CRITERIA FOR ACCREDITATION OF
CONTINUING EDUCATION PROGRAMS**

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Introduction

The purpose of this document is to outline the criteria that NACOR shall use in determining the number and type of credits it awards to continuing education (CE) activity submissions. Adherence to these criteria, and their associated guidelines, is considered indicative of the capability to provide quality continuing education and constitutes the primary basis for recognition by the National Association of Canadian Optician Regulators as a NACOR accredited program of continuing education.

The document is intended to act as a guideline for the providers of continuing education activities.

Contained within this document shall be the current methods of accreditation evaluation, as well as a detailed breakdown of the requirements for CE providers who wish to obtain credits for activities they will be sponsoring.

By accrediting a program NACOR does not imply any endorsement of any products, services or companies associated with any accredited activity.

Accreditation granted by the NACOR applies for 3 years from the time the activity was originally accredited.

NACOR accreditation does not apply to Ontario and Quebec. Contact these provinces directly for information on submitting continuing education for accreditation.

Criteria for Accreditation

1. Every submission must be an exact representation of what will be presented.
2. Submit a completed *Request for Continuing Education Activity Accreditation Application Form*.
3. A detailed outline or course abstract listing specific learning outcomes must be submitted for each course. Educational goals and specific learning outcomes should reflect the relationship of the program topic(s) or content to modern opticianry practice. Any materials including power point presentations must accompany the submission.
4. All submissions must include a list of all competencies covered within the course/presentation. (See Appendix 3: National Competencies for Canadian Opticians, 3rd Edition.) While it is encouraged that each activity covers multiple competencies, all submissions that teach at least one competency will be accepted for review. It is not required to cover all the performance indicators under each competency.
5. The intended audience and content level must be specified.
6. Course content must be generic in nature and presented in an objective manner.
7. The course length and method of presentation must be indicated on the *Request for Continuing Education Activity Accreditation Application Form*.
8. Speakers must be qualified by education or experience to provide quality instruction in the relevant subject area for each course they are presenting.
9. An activity must be an organized program of learning that will contribute to the advancement **and** enhancement of professional competency and scientific knowledge in the practice of opticianry, and be designed to reflect the educational needs of opticians.

10. A syllabus or other handout material providing a general outline of the continuing education presentation should be developed and made available to participants at each program offered.
11. The Provider shall give evidence to each participant, in the form of a statement of credit or other official document, of successful completion of the continuing education program, in a timely fashion.
12. The promotion and advertising of each continuing education activity shall be conducted in a responsible fashion.
13. Accreditation granted by NACOR applies for three years from the date the activity is accredited. Accredited activities are eligible for a one-time renewal of three additional years. Renewals must be submitted to NACOR at least 60 days prior to the expiry date.
14. New CE accreditation requests must be substantially different from any previous CE submission by the same provider.

Methods of Delivery

The following are examples of types of activities that are considered for CE accreditation:

1. Live Presentations (Seminar, Lecture or Workshop)
2. Distance Learning/Distance Modules/Webinars
3. Scholastic (Educational Institution Course)

Method of Credit Type Selection:

Course submissions are considered for accreditation in one of the four recognized categories of credits (Eyeglass, Contact Lens, Eyeglass or Contact Lens, or Related Fields).

1. Every submission will be initially considered for one (1) credit.
2. In order to be considered for accreditation, the submission must be noticeably different from any previous submission by the same provider.
3. Additional credits will be awarded where a submission meets the additional credit requirements as listed within this document (see "*Requirements for Additional Credit*" section below).

4. The regulatory board in Prince Edward Island will only accept a maximum of one (1) credit per activity.

Course submissions: Minimum Criteria for one (1) Credit

1. Live Presentations (Seminar/ Lecture/ Workshop)

- a) Minimum 45 minutes of actual presentation time (does not include set-up or Q&A).
- b) Minimum of one competency must be covered in each submission.
- c) A speaker biography or curriculum vitae must be included for every eligible presenter.
- d) Complete copy of all media that will be presented must be included (e.g.: PowerPoint presentations).
- e) For any submission to be considered for an eyeglass or contact lens credit, the speaker/ presenter must be an optician, MD, educator or optometrist in their jurisdiction. If the presenter has worked at least two years full time in a specific field, then that presenter will be considered an expert in that field and therefore will qualify as a presenter for an eyeglass or contact lens activity.
- f) In the case of a workshop, the provider must provide what equipment will be used, the process for learning and the ratio of attendee/workstation with request.

2. Distance Learning/Distance Modules/Webinars

- a) The Provider must supply the method used to verify completion.
- b) Minimum of one competency must be covered in each submission.
- c) Complete copy of all media/documentation used must be included.
- d) Opticians must achieve a minimum mark of 70% on a test to receive credit(s).

3. Scholastic (Educational Institution Course)

- a) The Provider must submit a course outline.
- b) Minimum of one competency must be covered in each submission.
- c) The Provider must supply the method used to verify completion.
- d) There is a maximum of 10 credits for any program or course.

Requirements for Additional Credit

Additional credits will be awarded to an activity when:

1. The submission is longer than the initial 45 minutes, (each additional 45 minute interval will qualify for credits based on the table attached to this document).
2. Submissions that instruct opticians in current research in ophthalmic education and/or medical information to increase ophthalmic technical skills (other than product presentations) - will be awarded the minimum credits and receive content multiplier of 2x the sum of the awarded credits.
3. Submissions with subject matter identified by NACOR as necessary to train opticians to meet changes in ophthalmic technology or ophthalmic demands of Canadian consumers will receive the minimum credits and receive a content multiplier of 3x the sum of the awarded credits.

Credit Slip Requirements

The intention of outlining these requirements is to ensure that the participant receives all relevant information pertaining to a completed activity.

All statements of credit and/or other means of documenting credit should include the following informational items:

1. The name of the optician who participated in the activity.
2. The registration number of the optician who participated in the activity.
3. The signature of the optician who participated in the activity.
4. The NACOR program course number.
5. The title of the activity (must be the same as the title given on the accreditation request form).
6. The name of the provider.
7. The date of the activity.
8. Signature of the administrator responsible for the administration of the activity.

In addition, the credit slips should be divisible into three identical sections (see below for specific sections):

1. Participants' copy (Given to the optician upon successful completion of the activity).
2. Participants' records (Given to the optician upon successful completion of the activity).
3. Sponsor's records (Retained by sponsor).

Credit slips should be distributed only following the completion of the program. Duplicate or replacement credit slips should be clearly marked as "Replacement Copy" or "Duplicate Copy".

Promotion & Advertising

Adequate advance information should be provided by the provider to prospective participants in order to enable them to be well-informed of continuing education programs. Promotional materials (e.g., brochures, advertisements, memoranda, letters of invitation, or other announcements) should clearly and explicitly include at least the following key informational items:

1. The educational goals and specific learning objectives of the particular program;
2. The competencies covered within the particular program;
3. The nature of the target audience(s) that may best benefit from participation in the program;
4. The name of the presenter/speaker and their credentials;
5. The fees for the program and a clear statement of the items that are and are not covered by those fees, as well as any applicable deadlines for pre-program cancellations and fee refunds;
6. The schedule of the educational activities;
7. A full description of all requirements established by the Provider for successful completion of the continuing education program and subsequent awarding of credit (e.g., passing a post-test at a pre-specified proficiency level, completing a program evaluation form, participating in all sessions or certain combinations of sessions which have been designed as a program package, etc.);
8. Acknowledgment of outside organization(s), if any, providing financial support for any component of the educational activity;
9. In the case of ongoing programs (mediated and live), the initial release date;
10. In the case of distance learning/distance modules and other forms of mediated instruction all of the informational items noted in above should be incorporated directly into the

printed, recorded and/or otherwise transmitted educational activities and materials;

11. Promotional materials should represent the educational program being offered in a fair and responsible manner.

Record Keeping

Records of participation and credit awarded should be kept for a minimum period of five years.

Monitoring

With advance notice, NACOR reserves the right to send a representative to attend any accredited courses for the purposes of reviewing the quality of the presentation and the accuracy of the information on the course submission. The review consists of ensuring that the course is taking place at the time and location and follows the submission for the accreditation as indicated on the course submission, and the relevance of the accompanying examination, if applicable.

If there are any inconsistencies between the submission and the presentation, NACOR will ask the provider/sponsor to rectify the inconsistencies. NACOR reserves the right to suspend the accreditation granted until the provider/sponsor addresses the inconsistencies.

Fees

Completed submissions received in the NACOR office 45 days or more prior to the scheduled event will be charged a fee of \$75/course submission plus GST/HST.

Completed submissions received in the NACOR office less than 45 days prior to the scheduled event will be charged a fee of \$150/ course submission plus GST/HST.

Completed submissions received in the NACOR office for reaccreditation will be charged a fee of \$50/course submission plus GST/HST. *Submissions for reaccreditation should be received in the NACOR office within 30 days of expiry.*

Payment guarantees a review of the activity by NACOR. NACOR is under no obligation to accredit, except under the conditions outlined within this document. Payment does not guarantee that the activity will receive credits.

If NACOR sends back a submission for revision the provider will not be charged again provided the revised submission is returned to NACOR within 15 days of the date of notification.

Credit definitions

EG - Eyeglass

Credits in this category represent topics associated with eyeglass technology. Fabrication, fitting techniques, emerging technology and product specific topics related to eyeglasses are all examples of this credit.

CL - Contact Lens

Credits in this category represent topics associated with contact lens technology. Fabrication, fitting techniques, emerging technology and product specific topics related to contact lenses are all examples of this credit.

EC - Eyeglass or Contact Lens

Credits in this category represent topics that are applicable to both eyeglass and contact lens dispensing. Annual General Meetings of the provincial regulatory boards and regulatory presentations are included. Examples include, but are not limited to:

- Refraction
 1. Advanced level of knowledge of accommodation
 2. Presbyopia related to accommodation
 3. Hypermetropia related to accommodation
 4. Correction of visual error and principles of refraction
 5. Demonstrate knowledge of retinoscopy in terms of the static plane mirror theory, with and against movements, speed of reflex, determination of the spectacle refraction retinoscopy in astigmatism and streak retinoscopy
 6. Demonstrate understanding of the principles of phorometry
 7. Explain the principles and procedures of the subjective examination
 8. Assess visual function and refractive status
- Vision Screening
 1. Demonstrate knowledge of instruments and procedures used in visual assessment
 2. Discuss the keratometer and slit lamp as analytical instruments
 3. Explain principles and procedures for use of the Topographer, Keratometer, Retinoscope, Slit lamp, Phoropter, Autorefractor, wave front devices and Trial lens sets
 4. Describe tests used to verify stereoscopic vision

5. Perform clinical procedures to assess *visual function and refractive status*.
 - Conduct visual acuity measurements
 - Conduct testing for ocular motility/versions
 - Conduct cover-uncover/alternating cover testing
 - Conduct corneal reflex testing
 - Conduct near point convergence/accommodation test
 - Conduct testing for pupillary function
 - colour vision verification
 - peripheral visual fields verification
- Low vision (emerging technology, techniques, etc.)
- Jurisprudence
- Patient management
 1. Demonstrate knowledge of ophthalmic pharmacology
- Anatomy &/or ocular pathology
 1. Apply knowledge of anatomy and physiology of the visual system to assess refractive status
 2. Demonstrate an understanding of contrast sensitivity.
 3. Demonstrate an understanding of the use of high and low contrast sensitivity charts

RF – Related Field (General Business/Other)

Credits in this category represent topics associated with general business practices. Examples include:

- Financial and commercial services
- Sales techniques & marketing techniques
- Financial, business planning
- Management & employer specific courses
- Ophthalmic surgical techniques
- Emergency medical courses, emergency intervention, CPR & first aid courses

APPENDIX 1**Outline of Evaluation – How Course Accreditation Works**

- A. Course submission: the sponsor or applicant must complete an application form for each course and presenter, and submit the application in writing with the required documentation:
- B. NACOR will review documents submitted by the provider.
- C. NACOR will then:
 - Accept and assign a CE category to the course: EG, CL, EC, or RF; or
 - Reject the course submission.
 - Determine the number of credits to be awarded.
 - Review accuracy of indicated continuing competencies covered within the submission.
 - If content warrants assign a course credit multiplier to the submission.
- D. NACOR will assign a course code.
- E. NACOR will post the course on the NACOR website, by listing the course code, title, assigned credits and covered competencies.
- F. NACOR will send a letter via email to provider to confirm the course accreditation.
- G. If NACOR rejects the course submission, the provider may appeal to NACOR in writing within 10 days of receipt of rejection notice.

APPENDIX 2
Guidelines to Awarding CE credits

Type of CE Activity	Time	Credits
One hour lectures, industry oriented workshops and seminars	One hour is 45 minutes	One credit per hour for the first two hours, and half a credit per hour thereafter to a maximum total of four credits
Distance modules	Minimum 2000 words	One credit (including the questionnaire)
Distance modules	2000 – 4000 words	Two credits (including the questionnaire)
Distance modules	4000 words or more	Three credits (including the questionnaire)
Video, DVD, CD Rom	One hour is 45 minutes	One and a half credit total (including questionnaire)
Questionnaires	Minimum 10 questions	Half a credit (not applicable to distance delivery courses)
Scholastic (Educational Institution Course)	1 credit for each 45 minutes	1 credit/45 minutes of teaching time to a maximum of 10 credits

Unit 1: Assumes Professional Responsibilities		
Competency	Performance Indicator	Practice Illustration
1.1 Demonstrate a commitment to patient/client, the public and the profession.	1.1.1 Adhere to privacy and confidentiality legislation, regulatory requirements and employer policies.	<ul style="list-style-type: none"> • Respects privacy of patient/client when communicating personal health information. • Maintains confidentiality, privacy and security when sharing, transmitting, (storing) and disclosing information (for example, applying password protection on computer systems, obtaining consent to share and disclose information).
	1.1.2 Integrate the Code of Ethics into professional practice as a basis for all decisions and actions.	<ul style="list-style-type: none"> • Demonstrates integrity, accountability, respect and ethical values. • Practices within professional standards of practice. • Provides care in a non-discriminatory manner. • Demonstrates sensitivity to diversity. • Accepts responsibilities for actions and decisions.
	1.1.3 Communicate title and credentials accurately.	<ul style="list-style-type: none"> • Communicates appropriately to the public, in writing and verbally, the professional designation of Licensed /Registered Optician.
	1.1.4 Recognize and manage professional boundaries.	<ul style="list-style-type: none"> • Adheres to provincial regulations, standards of practice, guidelines and Code of Ethics related to maintaining professional boundaries. • Seeks guidance in managing professional boundaries.
	1.1.5 Refer any incompetent, illegal or unethical conduct by colleagues (regulated and non-regulated) or other health personnel to the appropriate authority.	<ul style="list-style-type: none"> • Reports incidence of unauthorized practice or use of the title to the appropriate regulatory body. • Reports incidence of unprofessional, unsafe, unethical behaviours to appropriate person(s) (i.e. manager, supervisor, regulatory body).
	1.1.6 Recognize and manage ethical situations.	<ul style="list-style-type: none"> • Applies critical-thinking to manage ethical situations. • Seeks guidance in identifying and managing ethical situations. • Recognizes and manages potential, perceived or actual conflicts of interest.
1.2 Work within personal and professional limits and seek assistance when required.	1.2.1 Manage professional responsibilities by recognizing personal and professional limits.	<ul style="list-style-type: none"> • Reflects on and evaluates own practice. • Obtains external feedback to support self-reflection. • Assesses quality of services provided and identifies opportunities for improvement. • Demonstrates knowledge of professional scope of practice as defined by legislation and jurisdiction. • Ensures the appropriate knowledge, skill and judgment before performing activities or procedures. • Ensures the appropriate legislative authority is in place before performing restricted activities.

Unit 1: Assumes Professional Responsibilities		
Competency	Performance Indicator	Practice Illustration
1.2 Cont'd	1.2.2 Seek assistance or refer to an appropriate professional when the condition or situation is beyond personal competence and/or professional scope of practice.	<ul style="list-style-type: none"> Refers patients /clients for consultation when conditions or issues are beyond knowledge, skill and/or judgment. Seeks assistance to clarify professional scope of practice.
1.3 Prepare documents and records in accordance with provincial legislation, standards and guidelines.	1.3.1 Document client care using either of Canada's official languages.	<ul style="list-style-type: none"> English or French
	1.3.2 Ensure consistency with organizational policies and record keeping legislation, standards and guidelines.	<ul style="list-style-type: none"> Identifies inconsistency with organizational policies and jurisdictional requirements. Advocates for consistency with legislation and professional standards and organizational policies.
	1.3.3 Maintain records consistent with provincial regulations, standards and guidelines.	<ul style="list-style-type: none"> Maintains records in accordance to professional standards of practice. Retains records for the period of time stipulated by the jurisdiction.
	1.3.4 Release records in accordance with legislation, regulations and standards of practice.	<ul style="list-style-type: none"> Facilitates the timely transfer of records and prescriptions to others as defined in legislation, regulations and standards of practice. Provides access to records according to legislative and regulatory requirements. Limits access of records according to legislative and regulatory requirements.
1.4 Ensure informed consent prior to and throughout service provision.	1.4.1 Adhere to regulatory, legislative and standard requirements regarding informed consent.	<ul style="list-style-type: none"> Demonstrates an understanding of the principles of obtaining consent when providing treatment, engaging in financial arrangements, collecting, disclosing, storing and releasing personal information. Refers to legislation and regulatory standards and guidelines.
	1.4.2 Exercise the process of obtaining informed consent.	<ul style="list-style-type: none"> Identifies situations where informed consent may be problematic and takes appropriate steps (for example, when a client is incapable of providing consent, optician seeks consent from substitute decision-maker). Demonstrates knowledge of the substitute decision-makers hierarchy. Engages the patient/client in an informed consent process.

Unit 2: Communication and Collaboration Effectively		
Competencies	Performance Indicators	Practice Illustration
2.1 Demonstrate appropriate, clear and effective communication with patients/clients, their stakeholders, their support system, and interprofessional team members.	2.1.1 Use a wide range of verbal and non-verbal communication strategies.	<ul style="list-style-type: none"> • Uses empathic and active listening skills. • Itemizes and rephrases choices to clarify needs. • Clarifies statements and uses clear appropriate language. • Uses appropriate terminology when speaking with professionals. • Uses patient/client-centred language.
	2.1.2 Communicate in a manner that is respectful to the individual needs and beliefs of the patient/client.	<ul style="list-style-type: none"> • Takes into consideration the age, cultural diversity and capacity of patient/client. • Presents eyewear and eye care options clearly and effectively. • Delivers information in an open, honest, respectful and thoughtful manner.
	2.1.3 Use an effective dialogue, which employs an appropriate mix of questions to elicit information.	<ul style="list-style-type: none"> • Uses open-ended and close-ended questions. • Poses questions to clarify understanding.
	2.1.4 Provide appropriate literature based on the patient/ client's specific needs	<ul style="list-style-type: none"> • Provides handouts, directives to a website, instructions and/or follow-up care. • Provides materials that are appropriate to the audience (for example, the correct literacy level, readability, font size, confirm literacy and computer skills).
	2.1.5 Consult the established protocols and policies to manage and report abusive and aggressive behaviour from patients/clients.	<ul style="list-style-type: none"> • Follows customer service organization's policies. • Report abusive behaviours to the appropriate personnel (for example, supervisor, manager)
2.2 Works effectively within the team.	2.2.1 Contribute to team decision-making	<ul style="list-style-type: none"> • Actively participates in team meetings. • Participates in the development of organizational policies. • Works collaboratively with team members.
	2.2.2 Consider and apply knowledge of team members' strengths and capabilities	<ul style="list-style-type: none"> • Seeks guidance when required. • Takes into consideration and respects the opinions of others.
	2.2.3 Use effective interpersonal skills to resolve conflicts and complaints.	<ul style="list-style-type: none"> • Uses appropriate communication skills when resolving conflicts, such as active listening and reflection. • Demonstrates sensitivity to differences of opinions. • Seeks guidance when needed. • Develops viable options to resolve conflicts and/or complaints.
	2.2.4 Assume responsibility for completion of your assigned tasks.	<ul style="list-style-type: none"> • Ensures integrity and accountability in completing tasks. • Demonstrates transparency if unable to complete a task.

Unit 3: Educates and Advocates Effectively		
Competencies	Performance Indicators	Practice Illustration
3.1 Advocate for the profession.	3.1.1 Demonstrate awareness and understanding of self-regulation and the role of professional associations.	<ul style="list-style-type: none"> Engages in regulatory body and professional association activities. Keeps abreast of applicable legislation, regulations, standards of practice and guidelines. Regularly seeks and reviews information from the regulatory body and professional association.
	3.1.2 Recognize and promote the interprofessional care of the eye-care team.	<ul style="list-style-type: none"> Summarizes the role of the Optician and explains the differences between the members of the eye care team.
	3.1.3 Educate the employer and the public on the role of the Optician and benefits in receiving care from a Registered/Licensed Optician.	<ul style="list-style-type: none"> Explains the similarities and differences of Optician, Ophthalmologist, and Optometrist and explains this information in a meaningful way. Communicates the scope of practice. Advocates for organizational policies that support public protection. Promote use of title.
3.2 Advocate for the patient/client.	3.2.1. Serve as a patient/client advocate with other members of the eye care team.	<ul style="list-style-type: none"> Refers the patient / client to the appropriate member of the team. Encourages routine ocular health assessment.
	3.2.2 Engage in active discussion with other members of the eye care team to best meet and serve the patient/ client needs.	<ul style="list-style-type: none"> Liaises with patient/client's medical practitioners as required. Seeks consultation and recommendations from different members of the team.
3.3 Teach, guide, instruct, mentor, and supervise the student/intern in all areas of the profession.	3.3.1. Communicate industry standards and provincial requirements.	<ul style="list-style-type: none"> Actively mentors students/interns in the performance of the practical and theoretical expectations of the profession. Directs students/interns to appropriate resources.
	3.3.2 Monitor and evaluate the performance of the student/intern.	<ul style="list-style-type: none"> Conducts regular assessments of personal learning needs to ensure ongoing competence of the student/intern. Takes accountability for the actions of the student/ intern. Manages assignments of services.
	3.3.3 Promote a culture of organizational learning.	<ul style="list-style-type: none"> Encourages and implements a plan for continual professional improvement and learning. Supports and encourages student/intern to manage learning in order to maximize their potential and develop their skills. Provides formative, constructive feedback to support professional growth. Provides mentoring, preceptorship, teaching and coaching.

Unit 3: Educates and Advocates Effectively		
Competencies	Performance Indicators	Practice Illustration
3.3 Cont'd		<ul style="list-style-type: none"> • Embrace advancements and changes in techniques • Support a positive environment for the exchange of information between team members regardless of status
3.4 Teach, guide, instruct and supervise non-regulated support staff (for example, reception, optometric assistance, fashion consultants, frame consultant, laboratory techs, administrative staff)	3.4.1 Communicate expectations and assignments to non-regulated staff.	<ul style="list-style-type: none"> • Ensures appropriate legislation, regulations and industry standards are maintained in all aspects of patient/client care. • Assigns tasks and activities, taking into consideration competency and restrictive activities.
	3.4.2 Support direct authority of non-regulated staff.	<ul style="list-style-type: none"> • Implements plans for continual professional improvement and learning. • Supports the development and implementation of job descriptions for non-regulated support staff. • Provides formal and informal performance reviews. • Demonstrates knowledge and applies relevant human resource legislation and collective agreements. • Adheres to regulatory requirements and/or guidelines relating to the assigning of tasks.
3.5 Teach, guide and instruct patients/clients.	3.5.1 Demonstrate an understanding of patient/client's expectations and aspirations and manage situations where these cannot be met.	<ul style="list-style-type: none"> • Conducts an assessment to determine patient/client wants and needs. • Clarifies patient/client expectation. • Provides patient/client education applicable to the patient/client's wants and the limitations of the product. • Identifies and manages escalating emotions.
	3.5.2 Communicate the advantages and limitations of the product to the patient/client in a meaningful and clear manner.	<ul style="list-style-type: none"> • Explains the limitations of spectacle and contact lens designs to maximize patient/client success. • Explains the adjustment process for specific ophthalmic appliances (for example, progressive addition lenses) to promote successful adaptation.
	3.5.3 Apply knowledge of learning principles and teaching techniques.	<ul style="list-style-type: none"> • Uses appropriate teaching methods to meet patients/clients' needs. • Assesses current knowledge of patient/client. • Adjusts teaching plan and delivery to meet special needs.

Unit 3: Educates and Advocates Effectively		
Competencies	Performance Indicators	Practice Illustration
3.5 Cont'd	3.5.4 Implement an individualized teaching plan in order to promote, maintain and restore ocular health.	<ul style="list-style-type: none"> • Recommends regular ocular health assessment. • Explains the uses and limitations of the ophthalmic appliance. • Uses a variety of demonstration techniques, including repeat demonstration. • Discusses misuse and unnecessary abuse of eyewear. • Collaborates with patient/client and caregivers to develop a patient/client-centred teaching plan.
	3.5.5 Discuss with the patient/client the systemic disease and its ocular impact.	<ul style="list-style-type: none"> • Provides a layman's explanation of the ocular impact of a particular disease.
3.6 Adjust teaching plan and delivery to meet needs of all patients/clients.	3.6.1 Recognize factors influencing learning and adjust teaching/training.	<ul style="list-style-type: none"> • Adjusts teaching/training based on demographics and physical factors, for example, age groups, vision and hearing impaired, literacy level, language, cognitively impaired.
	3.6.2 Use appropriate supporting materials.	<ul style="list-style-type: none"> • Presents diagrams, leaflets and a range of different explanations.
3.7 Perform in a leadership role in the eye care team.	3.7.1 Provide information within the scope of the profession and refer to the appropriate professional as necessary.	<ul style="list-style-type: none"> • Provides the patient/client with the necessary information to access the appropriate member of the eye care team if required.
	3.7.2 Advocate for, and adapt to, change to support competent, ethical and patient/client -centred care.	<ul style="list-style-type: none"> • Advocates for consistency between organizational policies and regulatory and legislative requirements. • Identifies safety issues and takes appropriate action. • Adapts to changes in practice using evidence, practice standards and informed practice.

Unit 4: Applies Organizational Management Principles		
Competencies	Performance Indicators	Practice Illustration
4.1 Apply principles of managing inventory.	4.1.1 Coordinate the purchasing, receiving and storage of appropriate inventory.	<ul style="list-style-type: none"> • Reviews vendor's product availability. • Verifies orders. • Stocks rotation.
4.2 Utilize financial management practices that ensure the appropriate provisions of care to patients/clients.	4.2.1 Ensure that accounting and/or bookkeeping systems are in place and adhere to legislation and regulations.	<ul style="list-style-type: none"> • Keeps accurate and current records of sales and expenses. • Reviews and records payment at the point of transaction as per company policy. • Communicates payment and refund policies to the patient/client. • Communicates and implements refund and warranty policies.
	4.2.2. Ensure proper procedures as in place for third party billing.	<ul style="list-style-type: none"> • Maintains appropriate records associated with third party billing (for example, invoices, billing forms, record of payment). • Makes payments in a timely manner. • Ensures accuracy in billing.
4.3 Apply principles of ethical marketing and advertising practices.	4.3.1 Ensure that marketing information provided is truthful and professional.	<ul style="list-style-type: none"> • Develops advertising claims based on professional evidence-based literature and research. • Ensures and/or advocates for advertising claims that are compliant with regulations and standards. • Uses social media platforms in a professional, ethical and appropriate manner.
	4.3.2 Extend professional courtesy to competitors and collaborate as required to facilitate management of the overall eye health needs.	<ul style="list-style-type: none"> • Employs proper telephone etiquette. • Responds in a timely manner. • Speaks respectfully and professionally of optical competition.
4.4 Demonstrate sound knowledge of the current and emerging technologies used in practice.	4.4.1 Demonstrate willingness to embrace change and advancements in the industry.	<ul style="list-style-type: none"> • Investigates and engages in regular training of new products and technologies (for example, software updates, new equipment, and tools). • Advocates for resources which support advancement in technology. • Demonstrates knowledge of the retail optical business environment.
	4.4.2 Demonstrate use of computer-based systems, software and applications.	<ul style="list-style-type: none"> • Ensures proficiency with the use of computers, relevant software and applications (for example, managing the files and directory structure, using internal electronic mail). • Engages in training and professional development to enhance knowledge and proficiency.

Unit 4: Applies Organizational Management Principles		
Competencies	Performance Indicators	Practice Illustration
4.5 Manage activities related to human resource management.	4.5.1 Comply with labour legislation, collective agreements and organizational policies in the management of the performance of others (for example, employees, interns, students, volunteers, team members).	<ul style="list-style-type: none"> • Regularly engages staff in performance reviews. • Maintain appropriate human resource records. • Engages in ethical recruiting and hiring practices (for example, ensuring transparency with the hiring process). • Recognizes and manages conflict of interest. • Familiarizes self with and applies applicable legislation and agreements.
	4.5.2 Develop protocols and implement and conduct employee performance reviews and/or evaluations.	<ul style="list-style-type: none"> • Implements processes to support staff, students and interns in meeting their performance goals. • Demonstrates knowledge of mandatory reporting of regulated professionals according the jurisdiction. • In collaboration with staff, develops and supports remediation plans. • Ensures termination procedure is consistent with organizational policies and applicable legislation.
	4.5.3 Analyze and implement strategies for efficient workflow.	<ul style="list-style-type: none"> • Determines competence of staff and assigns task appropriately. • Reviews various resources and options to increase efficiency in workflow. • Follows applicable organizational policies to recommend and implement strategies.
4.6 Prioritize professional duties including when faced with multiple patients/clients and competing issues.	4.6.1 Assess, synthesize and analyze the competing issues and need of the patients/clients.	<ul style="list-style-type: none"> • Conducts an assessment of patient's/client's needs and itemizes competing demands to support prioritization. • Takes into consideration all available options to manage the situation. • Ensures patient/client safety and strives for efficient services. • Demonstrates open communication with patients/clients and others involved.
	4.6.2 Seek guidance and assistance as required.	<ul style="list-style-type: none"> • Refers patients/clients to appropriate professional. • Informs supervisor/manager/owner of situation and/or document event to obtain support and future guidance.
	4.6.3 Demonstrate flexibility, creativity and adaptability in meeting unexpected demands.	<ul style="list-style-type: none"> • Advocates for resources. • Applies critical thinking and reasoning when prioritizing competing issues. • Takes into consideration patient/client safety and well-being.

Unit 5: Ensures Patient / Client and Practice Safety		
Competency	Performance Indicators	Practice Illustrations
5.1 Recognize and implement infection control and prevention measures.	5.1.1 Implement and maintain a daily infection prevention control procedure.	<ul style="list-style-type: none"> • Ensures posting of appropriate signage is visible. • Re-enforces hand washing by staff. • Demonstrates proper hygiene elements when providing services to patient/client. • Adheres to infection prevention and control measures established by jurisdiction and national regulatory bodies (Optical Laboratory Association, Health Protection Branch of Canada, and Canadian Safety Association).
	5.1.2 Recognize the current landscape of infectious diseases and required preventative measures for public safety.	<ul style="list-style-type: none"> • Implements procedures to react to an acute infection disease outbreak. • Keeps abreast of public safety and infectious outbreaks. • Monitors changes in established regulations and standards.
	5.1.3 Demonstrate proper aseptic techniques.	<ul style="list-style-type: none"> • Disinfects lenses, tools and instruments. • Uses storage techniques for trial lenses commensurate with solution chemistry, pharmacology and microbiology issues. • Maintains sample frames on display in a hygienic fashion.
	5.1.4 Demonstrate proper aseptic techniques for contact lenses.	<ul style="list-style-type: none"> • Cleans the lens surface. • Disinfects the lens using Oxidization (Hydrogen Peroxide) Cold chemical regime. • Uses thermal disinfection (heat) neutralization, rinsing or storing. • Follows procedures for using protein removers.
5.2 Demonstrate a commitment to patient/client and workplace safety.	5.2.1 Adhere to polices, standards and procedures as it relates to patient/client and workplace safety.	<ul style="list-style-type: none"> • Engages in work safety training session, for example, WHMIS, fire-drills. • Demonstrates knowledge of legislation in terms of scope, material data safety sheets and labeling requirements for controlled substances. • Integrates safety practices into daily activities. • Monitors and responds to all vendor recalls and Health Canada alerts.

Unit 5: Ensures Patient / Client and Practice Safety		
Competency	Performance Indicators	Practice Illustrations
5.2 Cont'd	5.2.2 Manage risk in the workplace to prevent and mitigate safety issues.	<ul style="list-style-type: none"> • Demonstrates situation awareness by observing the environment, anticipating potential risks and seeking assistance when needed. • Integrates infection and prevention measures. • Takes appropriate actions to align consistency with practice environment and established policies, legislation and standards (for example, labour laws, safety legislation, industry standards). • Advocates for changes when risks are identified by recommending interventions. • Documents and tracks incidences. • Participates in quality improvement initiatives. • Ensures the premises do not represent a physical safety hazard.
	5.2.3 Manage risk to prevent and mitigate safety issues to patients/client.	<ul style="list-style-type: none"> • Integrates infection and prevention measures. • Takes action on identified risk to patients/clients and others. • Advocates for change when risks are identified by recommending interventions. • Documents and tracks incidences. • Applies knowledge of basic first aid and CPR. • Monitors and take action on expired substances, solutions and contact lenses. • Ensures patient/client education is provided on the proper use of the ophthalmic appliance. • Educates the patient/client as to the visual limitations of their glasses. • Understands the limitation a patient/client has after dilation. • Recognizes and prevents potential safety hazard (for example, remove unsteady chairs, trip hazards and child proof environment).

Unit 6: Demonstrates Clinical Knowledge		
Competency	Performance Indicators	Practice Illustrations
6.1 Demonstrate an understanding of the functionality of the instruments used in the examination of the eye and the implications of the results.	6.1.1 Recognize and name the equipment used in your practice.	<ul style="list-style-type: none"> • Converses with colleagues using profession-specific terminology. • Documents equipment names accurately in records.
	6.1.2 Demonstrate your knowledge of operating the equipment appropriate to practice.	<ul style="list-style-type: none"> • Ensures relevant knowledge of operating equipment when dispensing contact lens, eyeglass and/or refracting.
	6.1.3 Choose the appropriate equipment required for the situation.	<ul style="list-style-type: none"> • Performs appropriate measurements. • Recognizes the destructive nature of cutting corners.
	6.1.4 Interpret the readings and apply your knowledge to inform decisions and actions.	<ul style="list-style-type: none"> • Uses all available information to develop a plan.
6.2 Demonstrate the appropriate depth and breadth of anatomy and physiology.	6.2.1 Demonstrate an understanding of the visual pathway.	<ul style="list-style-type: none"> • Recognizes disruptions in vision caused by disease or accident.
	6.2.2 Demonstrate an understanding of the anatomy of the eye.	<ul style="list-style-type: none"> • Recognizes disruptions in vision caused by cataracts.
	6.2.3 Demonstrate an understanding of visual fields.	<ul style="list-style-type: none"> • Recognizes disruptions in vision caused by macular degeneration and glaucoma
	6.2.4 Demonstrate an understanding of the photochemistry of vision.	<ul style="list-style-type: none"> • Recognizes disruptions in vision caused by photophobia.
	6.2.5 Demonstrate an understanding of the pathology of the ocular system.	<ul style="list-style-type: none"> • Recognizes disruptions in vision caused by glaucoma.
	6.2.6 Understand the implications and relevance of systemic diseases to ocular health.	<ul style="list-style-type: none"> • Recognizes disruptions in vision caused by diabetes.
6.3 Demonstrate an understanding of physical optics.	6.3.1 Apply current and relevant ophthalmic theories using mathematical calculations to select appropriate eyewear.	<ul style="list-style-type: none"> • Demonstrates an understanding of concave, convex, prism.

Unit 7: Applies Critical Thinking and Professional Judgment		
Competency	Performance Indicators	Practice Illustrations
7.1 Demonstrate sound professional judgment and clinical reasoning.	7.1.1 Apply relevant and current knowledge of physiology, lens theory and solutions and understanding of fabrication of ophthalmic appliances.	<ul style="list-style-type: none"> • Determines visual or physiological symptoms that may require immediate attention. • Makes decisions based on sound professional knowledge.
	7.1.2 Solve problems by applying an organized approach.	<ul style="list-style-type: none"> • Defines the problem, identifies alternative explanation for the problem and possible outcomes and recommendations. • Rationalizes the preferred course of action. • Takes into consideration relevant standards, guidelines, legislation and organizational policies.
	7.1.3 Demonstrate problem-solving skills to correct any deficiencies related to the ophthalmic appliance.	<ul style="list-style-type: none"> • Examines ophthalmic appliance and notes adjustments or repairs required. • Applies knowledge of various frame materials and the impact to the adjustment or repair. • Collects objective data from the patient/client and others to support determination of root cause. • Collects subjective data from the patient/client to determine root cause • Seeks consultation with others when needed (for example, colleagues, peers, supervisor, physicians, and laboratory). • Integrates relevant information with previous learning, experience and professional knowledge. • Calculates and communicates the cost of repairs. • Teaches the patient/client proper care and maintenance of the ophthalmic appliance to prevent future problems.
	7.1.4 Establish mutual understanding with the patient/client.	<ul style="list-style-type: none"> • Explains to patient/client normal adaptation to realign expectations (for example, lens materials, prescription changes, size of frame, optical situations). • Clarifies expectations that impact the services (for example, warranties, follow-up care). • Collaborates with patient/client and others to encourage resolution.
	7.1.5 Manage time and organize patient/client care effectively.	<ul style="list-style-type: none"> • Prioritizes patient/client care needs according to urgency. • Manages competing demands in an ethical, safe and efficient manner.

Unit 7: Applies Critical Thinking and Professional Judgment		
Competency	Performance Indicators	Practice Illustrations
7.1 Cont'd		<ul style="list-style-type: none"> • Seeks assistance and reports needs as required. • Demonstrates flexibility, creativity and adaptability in meeting unexpected demands. • Applies project management skills to organize tasks or projects (for example, assigns tasks, develops staffing schedule, determine resources, monitors progress and revises plan when needed). • Takes into consideration others' skills and opinions. • Takes into consideration organization policies and procedures
7.2 Engage in reflection and evaluation and integrate finding into practice.	7.2.1 Evaluate the effectiveness of the resolution.	<ul style="list-style-type: none"> • Determine if patient's/client's visual, vocational, and a vocational needs and requirements are met. • Takes into consideration feedback obtain from others, through consultation. • Reflects on outcome and options considered.
	7.2.2 Acquire and apply knowledge from everyday experiences.	<ul style="list-style-type: none"> • Demonstrates an insight into personal experience and limitations. • Reflects on professional behaviours and communication skills used. • Integrates new knowledge, skills and attitudes into practice.
	7.2.3 Demonstrate an understanding of the importance of continuous learning.	<ul style="list-style-type: none"> • Identifies resources and methods for keeping up-to-date on professional responsibilities (for example, regulatory and association websites, peer review journals, conferences, experts). • Engages in continuing education/life-long learning and professional development. • Reflects on learning and how the new knowledge will impact practice • Complies with provincial requirements to demonstrate ongoing competence.

Unit 8: Utilizes Practice Process		
Competency	Performance Indicators	Practice Illustrations
8.1 Conduct an assessment to determine patient/client needs and appropriate ophthalmic appliances.	8.1.1 Obtain relevant optical and health history.	<ul style="list-style-type: none"> • Asks questions specific to life style including vocation / avocation needs. • Obtains previous prescription and optical history. • Obtains information specific to current medication use • Obtains information specific to health history and family history. • Obtains information about previous experience with ophthalmic appliances.
	8.1.2 Collect both objective and subjective information.	<ul style="list-style-type: none"> • Identifies patient's/client's concerns and self-described symptoms. • Determines patient's/client's wants and preferences. • Observes physical factors (for example, head tilt, head position when walking, height of the person). • Observes condition of current ophthalmic appliance.
	8.1.3 Determine environmental influences on vision including lighting and physical set up of workstation.	<ul style="list-style-type: none"> • Identifies ergonomics factor (for example, computer distance, lighting, computer position, telephone/head-set).
	8.1.4 Apply knowledge of binocular vision to the dispensing of an appropriate ophthalmic appliance.	<ul style="list-style-type: none"> • Demonstrates knowledge of specific eye anomalies requiring the use of contact lenses in order to maximize binocular vision. • Determines the presents of Anisometropia or Antimetropia resulting in Aniseikonia. • Demonstrates knowledge in producing aniseikonic eyeglasses to balance retinal image sizes to maximize binocular design.
8.2 Prepare recommendations based on defined needs.	8.2.1 Consider assessment data to support decisions.	<ul style="list-style-type: none"> • Analyses and synthesizes assessment data to determine options. • Recommendations appropriate ophthalmic appliances based on identified visual, vocational and avocational needs. • Addresses patient/client concerns about vision and/or ophthalmic appliances.
8.3 Apply industry standard before dispensing eyewear to ensure quality and safety.	8.3.1 Ensure measurements are performed accurately using approved devises and tools.	<ul style="list-style-type: none"> • Calibrates equipment to ensure accuracy and validate good working orders • Ensures appropriate measurement techniques are followed.
	8.3.2 Ensure all ophthalmic appliances meet minimum recommended tolerances.	<ul style="list-style-type: none"> • Applies standard tolerance chart.

Unit 8: Utilizes Practice Process		
Competency	Performance Indicators	Practice Illustrations
8.3 Cont'd	8.3.3 Ensure manufacturer's recommendations are considered.	<ul style="list-style-type: none"> • Takes into consideration limitations of the wearing schedules prior to dispensing. • Takes into consideration the manufacture's recommendation when dispensing. • Takes into consideration the power limitations for the specific brands.

Unit 9: Focus Area: Eyeglass		
Competency	Performance Indicators	Practice Illustrations
9.1 Apply knowledge to determine the appropriate lenses and frames to meet the needs of the patient.	9.1.1 Understand the relationship between the prescription requirements and the lens characteristics.	<ul style="list-style-type: none"> Identifies limiting factors of the prescription and physiology. Considers appropriate lens modalities. Selects appropriate lens material for the prescription.
	9.1.2 Understand the relationship between the prescription requirements and the frame characteristics.	<ul style="list-style-type: none"> Selects appropriate frames for the prescription. Understands limitation of lens design.
	9.1.3 Identify anomalies in a prescription.	<ul style="list-style-type: none"> Defines and lists anomalies of the eye that require ophthalmic appliances. Evaluates the values in the optical prescription (i.e. Sphere, Cylinder, Axis, Prism, Add power). Demonstrates the knowledge of dominant and non-dominant eye and the role in obtaining binocular vision.
	9.1.4 Recommend appropriate ophthalmic appliances, taking into consideration visual, vocational and avocational needs.	<ul style="list-style-type: none"> Takes into consideration environmental factors that influence vocational needs (for example, computer distance, lighting, outside work). Takes into consideration avocational needs. Takes into consideration safety products (for example, electrician need for non-conductive frames). Applies CSA & ANSI Standards.
	9.1.5 Advise patient/client on the limitations resulting from the lenses and frame combination.	<ul style="list-style-type: none"> Makes recommendations to alternative care where required (for example, low vision and contact lenses). Determines suitability of four point rimless frames and suitability of high index lenses. Advise patients/clients regarding the benefits and disadvantages of each lens modality.
	9.1.6 Apply knowledge of available manufacturing specifications.	<ul style="list-style-type: none"> Reviews with the patient/client the benefits and limitations of lens materials, coatings and frame designs to support decision-making (for example, high index lenses, polycarbonate, trivex, CR 39).
	9.1.7 Identify frame materials and consider material properties.	<ul style="list-style-type: none"> Demonstrates an understanding of limitation of frame materials. Applies professional judgment to determine whether the frames can be repaired. Selects the appropriate repair method.

Unit 9: Focus Area: Eyeglass		
Competency	Performance Indicators	Practice Illustrations
9.2 Take accurate measurements with the appropriate tools.	9.2.1 Demonstrate the skills required to ensure accurate measurements.	<ul style="list-style-type: none"> • Accurately performs optical and frame measurements (for example, segment height (all types of multifocal lenses), optical centre height, pantoscopic angle, vertex distance, monocular pupillary distance (distance and near) and frame wrap. • Determines the working focal length and measure accordingly.
9.3 Demonstrate the ability to convey the necessary information and measurements to the lab/frame supplier for the creation and manufacture of eyeglasses.	9.3.1 Demonstrate an understanding of the manufacturing process.	<ul style="list-style-type: none"> • Demonstrates an understanding of whether the lenses are surfaced or stock and the effect this will have on the final product. • Demonstrates an understanding of the effect of altering the base curve and the effect it will have on the eyeglasses and their effectiveness.
	9.3.2 Order frames and lenses from the appropriate suppliers to complete the eyeglasses.	<ul style="list-style-type: none"> • Conveys information accurately to the manufacturer/laboratory. • Specifies the optical measurements to ensure maximum visual acuity (for example, pupillary distance (pd), seg height, optical centre (oc) height, base curve, vertex distance, pantoscopic tilt, frame wrap, frame dimensions and center thickness (CT)). • Specifies lens type, materials, coatings and finishing. • Provides frame specification (for example, model number, size and colour).
	9.3.3 Ensure timely delivery of the eyewear.	<ul style="list-style-type: none"> • Coordinates timely delivery of ophthalmic appliance with the laboratory and frame supplier. • Monitors a reasonable delivery time. • Communicates expectation with patient/client and suppliers.
9.4 Demonstrate steps required to ensure accuracy of the lens with prescription.	9.4.1 Perform final inspection of ophthalmic appliance upon receipt from the lab and before delivery to the patient/client.	<ul style="list-style-type: none"> • Uses bench to align the frame. • Verifies the frame order (for example, size, colour, model). • Inspects for damage and that lens are installed properly.
	9.4.2 Take appropriate measurements to validate lens to the prescription and confirm lens are within regulatory standards.	<ul style="list-style-type: none"> • Verifies the accuracy of the ophthalmic appliance (for example, power, measurements). • Measures and verifies the lenses are correctly positioned in the eyeglass frame, within regulatory standards.

Unit 9: Focus Area: Eyeglass		
Competency	Performance Indicators	Practice Illustrations
9.5 Demonstrate ability to fit the eyeglasses to the patient/client.	9.5.1 Perform appropriate adjustments to ensure a correct fit.	<ul style="list-style-type: none"> • Confirms the fit and effectiveness of the eyeglasses on the patient/client. • Select the appropriate instruments and tools to adjust the eyeglass to maximize the effectiveness for the patient/client. • Adjusts temple bend, nose pads, pantoscopic tilt and frame wrap to fit the eyeglasses to the patient/client to maximize effectiveness.
	9.5.2 Determine the frames and lens are properly position on the patient/client.	<ul style="list-style-type: none"> • Performs an assessment to collect subjective and objective information to ensure maximum visual acuity and comfort. • Matches the form, type and positioning of lenses to meet all the patient's/client's needs.
9.6 Demonstrate the ability to appropriately use the tools necessary for the duplication of the eyeglasses.	9.6.1 Demonstrate the ability to use and interpret the results found using optical tools.	<ul style="list-style-type: none"> • Demonstrates proper and accurate use of a lensometer to neutralize a lens and interpret the findings. • Demonstrates proper and accurate use appropriate tools (for example, pupilometer, lens clock, thickness calipers) and interprets the findings accurately.

Unit 10: Focus Area: Contact Lenses		
Competency	Performance Indicators	Practice Illustrations
10.1 Conduct a comprehensive assessment specific to fitting and dispensing of contact lenses.	10.1.1 Conduct a comprehensive medical and optical health history assessment specific to fitting and dispensing of contact lenses.	<ul style="list-style-type: none"> • Determines patient's/client's previous contact lens and solutions use, including prior history of allergic reactions, sensitivity or problems with lenses or solutions. • Identifies current medication use . • Obtains a medical history including systemic diseases and any issues with dry eyes. • Confirms with the patient/client the date of the last refraction.
	10.1.2 Identify anomalies in a prescription.	<ul style="list-style-type: none"> • Defines and lists anomalies of the eye that require ophthalmic appliances. • Evaluates the values in the optical prescription (i.e. sphere, Cylinder Axis, , Prism, Add power) • Applies knowledge of dominate and non-dominate eye and the role in obtaining binocular vision.
	10.1.3 Conduct a comprehensive assessment to obtain corneal readings including ocular health and visual acuity.	<ul style="list-style-type: none"> • Conducts an assessment using the appropriate tools (for example, keratometer, slit-lamp/ biomicroscope using and all forms of illumination). • Performs appropriate evaluations (for example, tarsal plate and tear film evaluation). • Determines when not to proceed with a contact lens fitting.
	10.1.4 Use ophthalmic instruments and devices to perform ocular measurements for contact lens fitting.	<ul style="list-style-type: none"> • Evaluates the tear film for quality and quantity (for example, tear break-up time and Schirmer's testing). • Performs keratometry, slit lamp biomicroscopy and other adnexa measurements. • Measures patient's/client's visual acuity, distance and near. • Records and analyzes data to determine best lens selection
10.2 Select the appropriate trial lens, taking into consideration patient/client specific needs and compiled data.	10.2.1 Apply product knowledge to select the appropriate lens design, material, modality and compatible solution.	<ul style="list-style-type: none"> • Takes into consideration the prescription to determine the lens is not finalized in the initial process (for example consider the material selection, lens type rigid or soft lens). • Applies knowledge of various lens materials and modalities. • Applies understanding of sensitivities to lens materials and solutions. • Demonstrates knowledge of solution compatibility to materials. • Determine patient's/client's wants and need. • Takes into consideration the age and maturity of the patient/client. • Takes into consideration environmental factors that influence vocational needs (for example, computer distance, lighting, outside work). • Takes into consideration avocational needs.

Unit 10: Focus Area: Contact Lenses		
Competency	Performance Indicators	Practice Illustrations
10.2 Cont'd	10.2.2 Assess patient/client visual acuity, including the use of manifest over refraction if necessary, after a suitable adaptation time.	<ul style="list-style-type: none"> Evaluates visual acuity while lens is in situ.
	10.2.3 Verify lens fitting subjectively and objectively and make any adjustments to the fitting of the lens deemed appropriate.	<ul style="list-style-type: none"> Determines good centration, movement, visual acuity, comfort and good corneal integrity, for soft lens. Determines fluorescein pattern, movement, centration around the visual axis and good visual acuity, for rigid lens Ensures appropriate fit and comfort of patient/client.
10.3 Provide patient/client education that is patient/client-centred to ensure compliance in inserting, removing and caring for contact lenses.	10.3.1 Engage patient/client in the training of insertion and removal of contact lenses.	<ul style="list-style-type: none"> Engages patient/client in a repeat demonstration. Uses appropriate education materials (for example, video, handouts, and verbal instruction) taking into consideration the age and limitation of patient/client.
	10.3.2 Educate patients/clients on contact lens, solution, biocompatibility, storage and wear.	<ul style="list-style-type: none"> Demonstrates proper techniques of disinfection, cleaning, rinsing and storage of a contact lens including the replacement and cleaning of the case. Explains the need to respect the modality of wear. Explains the importance of following the wearing schedule recommended by the practitioner. Relays signs of solution sensitivity.
10.4 Promote maintenance of ocular health and corneal integrity.	10.4.1 Provide a follow-up care appointment with patient/client to assess post wear.	<ul style="list-style-type: none"> Confirms and documents follow-up appointments with patient/client. Tests visual acuity using appropriate tools (for example, slit lamp biomicroscopy and overkeratometry). Measures the corneal surface with the keratometer to determine little to no change. Clarifies understanding of post care and engage patient/client in further education if needed.

Unit 10: Focus Area: Contact Lenses

Competency	Performance Indicators	Practice Illustrations
10.5 Demonstrate an understanding of medication use and the implications on ocular health.	10.5.1 Demonstrate an understanding of the use of prescribed and/or non-prescribed drugs/substances.	<ul style="list-style-type: none">• Applies pharmacology knowledge when conducting an assessment.• Takes into consideration adverse effects of medication when selecting types of lens and educating on wearing schedule.

Unit 11 Focus Area: Refraction		
Competency	Performance indicators	Practice Illustration
11.1 Demonstrate an understanding of binocular function and ocular motility.	11.1.1 Measure and assess binocular function and ocular motility using standard industry practices.	<ul style="list-style-type: none"> • Describes ocular motility and binocular function.
11.2 Demonstrate an ability to use subjective and objective techniques to identify and quantify ametropia.	11.2.1 Demonstrate techniques to identify and quantify ametropia.	<ul style="list-style-type: none"> • Applies SOAP (subjective, objective, assessment and plan) technique when conducts an evaluation to determine final values and accuracy of testing .
11.3 Recognize significant signs and symptoms in relation to the patient's/client's eye and general health found incidental to the refraction.	11.3.1 Use equipment to determine visual impairment incidental of the refraction in relation to the patients/clients eye and general health.	<ul style="list-style-type: none"> • Interprets results from instruments and procedures used in refraction. • Demonstrates an understanding of how disease can affect vision. • Recognizes significance of migraine headaches. • Recognizes possible significance associated with photophobia.
11.4 Demonstrate the ability to assess the visual function in patients/clients with visual impairment.	11.4.1 Enable the referral system as a tool for a resolution to a visual impairment.	<ul style="list-style-type: none"> • Recognizes limitations in visual correction. • Recognizes personal limits and refers appropriately.
11.5 Demonstrate an understanding of medication use and the implications on ocular health.	11.5.1 Demonstrate an understanding of the use of prescribed and/or non-prescribed drugs/substances.	<ul style="list-style-type: none"> • Applies pharmacology knowledge when conducting an assessment and taking medical history. • Understands that certain medications have an implication on ocular health (for example, drug induced desiccation, induced dryness resulting in visual fluctuations). • Demonstrates knowledge of contraindications to refraction and apply standards of when not to refract based on information gathered (for example age of patients/clients, specific medication use). • Recognizes significance of unstable refractions.

Unit 12 Focus Area: Low vision		
Competency	Performance Indicators	Practice Illustrations
12.1 Recognize symptoms specific to low vision patients/clients.	12.1.1 Recognize functional implications, hereditary factors and prognoses of common causes of visual impairment.	<ul style="list-style-type: none"> • Collects relevant medical health information. • Identifies hereditary prominent diseases (for example, macular degeneration, retinitis pigmentosa). • Demonstrates knowledge of the progresses and prognoses of common visual diseases. • Understands the classification of legal blindness.
12.2. Demonstrate an understanding of the social, emotional and physical impact of low vision.	12.2.1 Conduct an assessment to determine emotional and physical needs of the patient/client within professional scope of practice.	<ul style="list-style-type: none"> • Evaluates the patient's/client's needs with respect to lifestyle. • Assesses the patient's/client's physical dexterity in using the ophthalmic appliance on an independent basis. • Assesses the patient's/client's preparedness to accept a low vision device. • Determines the patient's/client's support services.
	12.2.2 Address social, physical and emotional issues associated with low vision, within profession scope of practice.	<ul style="list-style-type: none"> • Provides resources (for example, community support groups, social worker) to address social and emotional needs. • Provides education to address physical limitation. • Refers to appropriate provider when emotional and social needs of the patient/client are outside the scope of the profession.
	12.2.3 Provide care in a patient/client-centred manner.	<ul style="list-style-type: none"> • Determines the patient's/client's visual goals. • Respects the sensitivity and emotional impact of low vision on the patient/client. • Adapts patient/client education to meet the needs of low vision patients/client. • Understands varying uses of low vision aides. • Remains current with new technology.
12.3 Recommend appropriate low vision device(s) and implement a continuing care plan.	12.3.1 Use the latest technology to dispense basic optical and non-optical low vision devices to achieve optimal vision.	<ul style="list-style-type: none"> • Predicts optimal magnification power by establishing required working distances based upon vocational and avocational needs. • Converts calculation from dioptric values to magnification power.
	12.3.2 Implement a patient/client-centred, continuing care plan.	<ul style="list-style-type: none"> • Collaborates with the patient/client and caregiver to establish a continuing care plan. • Establishes realistic goals and sets appropriate time frame for follow-up appointments.



ACCREDITATION POLICY: A GUIDE FOR CONTINUING COMPETENCY PROVIDERS

Overview

The purpose of the *Accreditation Policy* is to outline the principles, policy, and processes that the College of Opticians of British Columbia (College), or its designate, the National Association of Canadian Optician Regulators (NACOR), shall use in evaluating submissions for accreditation from continuing competency providers.

Continuing Competency Program

The *Health Professions Act*, the governing legislation for the College, requires each health regulatory organization to develop and administer a Continuing Competency program to promote high practice standards and maintain continuing competence among its registrants.

The purpose of the College's Continuing Competency program is to ensure that practicing opticians have maintained the required knowledge, skill, and judgement to practice competently, safely and ethically, in the interest of the public. The College's program is geared towards directed learning, which means that registrants will focus on continuing competencies that they need working on.

Continuing Competency Providers

In order to ensure availability and diversity of activities offered the College encourages all eligible providers to submit applications for accreditation. All applications will be evaluated using the same accreditation principles.

Providers include but are not limited to:

- Regulatory bodies, including the College of Opticians of BC
- Registrants
- Professional associations within the eye care industry
- Industry stakeholders
- Teaching/training institutions
- Eye-health related organizations



Principles of Accreditation

The following four principles will be considered in approving Continuing Competency (CC) activities for accreditation. These principles will be applied fairly and consistently in reviewing all applications for accreditation.

Principle 1 – Learning Outcomes Consistent with Continuing Competency

The learning objectives shall be directly aligned with meeting the continuing competencies based on the *National Competencies for Canadian Opticians* (3rd edition).

Continuing competencies are the ongoing skills, knowledge, and judgement necessary for competent practice of opticianry. The Continuing Competency program is a formal system mandated by the *Health Professions Act* (HPA) of assessing, monitoring, and reporting on the continuing competency of opticians.

The breakdown of each continuing competency and its performance indicators can be found in the continuing competency blueprint on the **NACOR website**, by clicking [here](#).

Using NACOR's application [form](#), providers will identify the continuing competencies that correspond with the activities they are submitting. NACOR will review and approve whether the identified competencies are appropriate.

Guideline 1: Activities submitted can cover multiple competencies.

For example, a seminar on a broad topic like the standards of practice may cover the following two competencies:

Competencies	Performance Indicators, for reference
Unit 1: Assumes Professional Responsibilities 1.1 Demonstrate a commitment to patient/client, the public and the profession.	1.1.1 Adhere to privacy and confidentiality legislation, regulatory requirements and employer policies.
	1.1.3 Communicate title and credentials accurately.
	1.1.5 Refer any incompetent, illegal or unethical conduct by colleagues (regulated and non-regulated) or other health personnel to the appropriate authority.
Unit 6: Demonstrates Clinical Knowledge 6.1 Demonstrate an understanding of the functionality of the instruments used in the examination of the eye and the implications of the results.	6.1.4 Interpret the readings and apply your knowledge to inform decisions and actions.

Guideline 2: While the College encourages submission of activities that teach multiple competencies, a CC activity that teaches at least one competency will be accepted for review. It is not required to cover all the performance indicators under each competency.



Guideline 3: Continuing competency activities will deliver on the stated learning objectives.

Principle 2– Accessible and Interactive Learning

There shall be diverse activities considered for accreditation to provide various options for registrants in terms of costs, formats, and delivery method (in-person and online). Whenever possible, in-person activities shall be available in an online format after the presentation.

Activities shall provide opportunities for registrants to interact.

Guideline 1: Providers will ensure that the level of information presented is relevant to the target audience. Providers shall identify any pre-requisites for participants to access and participate in the CC activity offered, if applicable.

Principle 3 – Relevant to Practice and Continuing Competency

The learning outcomes, content, and course design will be relevant to the targeted competency. If scenarios and case studies are presented, these shall be related to the practice of opticianry.

The *Opticians Regulation* defines opticianry as, “the health profession in which a person provides the services of:

- (a) dispensing vision appliances by
 - (i) using information contained in prescriptions, contact lens records and assessment records, and
 - (ii) duplicating corrective eyeglass lenses, with no change in refractive value, using a lensometer or similar device,
- (b) conducting automated refractions on the request of prescribers,
- (c) conducting independent automated refractions, and
- (d) promoting eye health and proper use of vision appliances...”

Content for continuing competency activities shall be developed with the purpose of educating registrants in the knowledge, skills, and judgement ([found in the continuing competency blueprint](#)) necessary for the ongoing practice of opticianry.

In addition, providers shall seek feedback from instructors, presenters, and co-learners for each CC activity offered.

Guideline 1: In addition to meeting continuing competencies, the accredited activities shall feature topics that address emerging and current vision care needs of the public of British Columbia. Examples of these topics include: patient-centered care practices, inter-professional collaboration among eye-care professionals, and vision services for the aging demographic.

The College will periodically publish these priority areas on its website.



Guideline 2: Registrants will have an opportunity to assess the CC activity they have participated in for the purpose of improving the content, design, and presentation. As far as practicable, feedback shall be collected immediately following the CC activity. Registrants will have the option to submit their comments anonymously.

Registrants' feedback will be reviewed to maintain accreditation of the activities. Continuing competency providers shall consider and act on registrants' feedback to improve the content and delivery of their activities.

Principle 4 – Quality Information (evidence-based, objective, current, and relevant)

CC activities shall be evidence-based, objective, current, and relevant.

Guideline 1: Evidence-based – Information used is based on credible research. Sources of information shall be clearly cited by the provider. These references will be easily accessible if registrants wish to find more information directly from the source.

Guideline 2: Objective – The information presented shall not focus on personal opinions or direct advertising of particular brands.

The focus of the CC activity will be information about the benefits of the product or technology rather than endorsement of company products or services. Such benefits would have been confirmed by research and not just based on personal endorsement of the presenter.

A provider may mention its product or technology as long as there is also mention of similar technology and products from other companies. Derogatory or discriminatory statements made against any organization, its products, and technology will not be allowed. However, comparison of technology and products may be warranted if information is based on research conducted by a neutral party.

Guideline 3: Current – Information presented shall not be outdated. Currency of information means there is no updated version of the information that contradicts the evidence presented.

Guideline 4: Relevant – The content shall be directly linked to continuing competencies for Canadian Opticians.

Pre-requisites for Activities

Providers may include pre-requisites for certain CC activities. For example, a provider may offer a course with graduated levels of information: basic, intermediate, and advanced.

Providers may restrict registration in the advanced course to those who have successfully completed the basic level.

Industry providers may specify whether the CC activities they are offering are open to all registrants or are limited to their optician employees. The College recognizes that employers



may develop professional development activities for their employees and may not be able to offer the same activities to all opticians due to intellectual property rights.

Types of Continuing Competency Activities for Accreditation

CC activities include:

- Live presentations (seminar, lecture, or workshop)
- Webinars
- Self-directed online learning
- Study groups
- Mentorship or opticianry-related work training
- Research projects (either conducted or participated in by registrants)
- Volunteer optical work
- Practicum
- Academic courses
- Tours (laboratory, manufacturing)
- Other activities

Submission Requirements

A) Pre-CC activity - The application form and the accompanying materials below are required.

- Application form
- Detailed Outline of topics to be covered
- Copies of actual materials (e.g. course materials)
- Contact information of teachers, presenters, or facilitators
- Sources of information with complete citations
- Presentation slides (*if applicable*)
- Handouts to be used during presentation (*if applicable*)

The College may send a representative to attend any accredited CC activity for the purpose of reviewing whether the actual presentation is consistent with what has been submitted by the provider.

B) Submission schedule and fees – NACOR’s guide for submission can be viewed [here](#).

C) Post-CC activity

- 1) Materials - After the CC activity is completed, the provider must submit any material used or covered that has not been previously submitted to NACOR. For example, the provider must re-submit presentation slides if those were updated.

CC activity materials may be made available by NACOR to participants upon request (except the application form). The provider may indicate if any of the material is not available for distribution to the registrants due to intellectual property rights.



Providers are primarily responsible for making available the CC activity materials, free of charge, to participants for a minimum of **90 days** after completing the activity.

- 2) Proof of completion - Providers must issue a proof of completion to each participant, which shall include these details:
 - Participant's full name and license number
 - CC activity title and code
 - Date of completion
- 3) List of participants (*optional*) – If available, the provider may provide to the College an electronic list of participants who completed each CC activity.

Suspension of Accreditation

Accreditation of a CC activity may be suspended for the following reasons:

- A) Significant inconsistencies between the materials presented during the actual course or presentation compared to what was submitted to NACOR. Significant inconsistencies mean that the content has been changed. Minor inconsistencies such as change in the order of how information is presented, will not result in suspension.
- B) If the CC activity received unsatisfactory feedback from participants.
 - For example, majority of participants provided feedback that the CC activity failed to meet the stated learning objectives. Or the presenter was not able to effectively communicate the information to the participants.
- C) If the CC activity no longer meets the accreditation principles.
 - For example, new research information coming out making the materials contained in a lecture or a course outdated.

NACOR will advise the provider in writing if the accreditation of a CC activity is suspended. Reasons for suspension and steps for re-submitting an application will be included in the letter.

If an accreditation is suspended for reasons under A and C, the Applicant will have to submit a new application.

Accreditation Details

Accreditation will be effective for three years from the date of approval.

Appendices

- Application form
- National Competencies for Canadian Opticians, 3rd Edition