



Canadian Orthoptic Council

Conseil Canadien d'Orthoptique

Canadian Orthoptic Council
Continuing Education
Guidebook
2024



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Introduction

It is understood that continuing education (CE) is the cornerstone of the maintenance of professional excellence. All Canadian Orthoptic Council (COC) certified members must therefore be able to demonstrate their involvement in educational activities to maintain certification. This is assessed once every three years when members are required to submit details of their educational activities.

Whilst all educational activities are valuable, it is recognized that certain topics have greater relevance to orthoptics; these are termed *core* subjects and greater emphasis is placed on these when assessing an individual's CE activities.

Core Subjects

The following topics are considered core subjects for the purpose of CE credits.

- Ocular anatomy and neuroanatomy
- Principles of visual fields, including testing and analysis
- Sensory and motor physiology, including assessment of binocular vision
- Optics, including refractometry, diagnostic and therapeutic use of prisms and contact lenses
- Assessment of visual acuity, accommodation, and fixation
- Detection and treatment of amblyopia
- Clinical assessment of strabismus, including:
 - Diagnostic evaluation and measurement
 - Congenital and acquired comitant forms
 - Incomitant forms (including mechanical and innervation disorders)
 - Syndromes (eg. Duane, Brown, Moebius, Congenital Fibrosis)
 - Strabismus associated with systemic disorders (eg. Thyroid Eye Disease)
 - Neuro-ophthalmologic syndromes (eg. Myasthenia, Parinaud)
 - Orthoptic Management and treatments
 - Principles of strabismus surgery
 - Nystagmus
 - Eye movement evaluation and measurements including saccadic velocity recording and electromyography.
- Child development and learning disabilities, including dyslexia
- Low vision assessment and low vision aids
- Electrophysiology principles and techniques including VEP, ERG and EOG
- Principles of genetics and heritable ocular diseases
- Clinical research methods, including computers in medicine and medical writing.

Other topics in the scope of ophthalmology are recognized as beneficial to the practice of orthoptics; as such, CE credits for topics that are not listed as “core” will be credited as “non-core” CE credit.

Definitions

Acceptable CE Activities:

Learning Activity: A *group* activity designed to enhance the knowledge and practice of attendees. Activities recognized for CE include meetings, lectures, symposia, webinars, hospital or department rounds and journal clubs. These are claimed in Sections 1-3.

Self Study: Specific activities as outlined in Section 5 that enhance the knowledge and practice of the profession that are completed at the orthoptist's discretion at any time during the CE cycle. These are claimed in Section 5.

Publication or Presentation: As outlined in Section 4.

Other Activities: Activities that enhance the knowledge and practice of the profession as outlined in Sections 6 and 7.

Accredited: The learning activity has applied for and received approval from the Canadian or American Orthoptic Councils.

Core Credits: These are awarded when the topic of the learning activity is considered *core* to the knowledge and practice of the profession in Canada and is linked to the National Competencies.

Non-Core Credits: These are awarded when the topic of the learning activity is considered to be *beneficial* to the knowledge and practice of the profession in Canada but is not linked to a core competency.

Proof of Attendance: The organizer of the learning activity provides proof that the registrant has attended the activity. This should show the name of the organizer, the topic(s) of the activity, the date of the activity, and the name of the attendee. Proof of completion of a quiz or other proof that contains these elements is acceptable. Receipt for payment or notification of enrollment will NOT be considered proof.

Verifiable: The orthoptist has received proof that they attended the event or completed the learning activity.

Non-verifiable: These activities meet the requirements of Section 5 and are valuable to the knowledge and practice of the profession but do not have an associated proof of attendance or completion. Non-verifiable activities can ONLY be claimed in Section 5.

Credit Ratio: The number of credits that can be claimed per hour of activity.

Sections 1 – 4: The ratio is 1:1

Sections 5 – 7: Please consult the section information

General Guidelines (reporting and auditing)

- Orthoptists will be required to submit CE forms on a 3-year cycle (October 1st to September 30th). A reminder from the COC will be sent to members at the end of their 3-year cycle asking for submission. Please note that orthoptists will ALSO receive an annual *registration* email from COC in October of each year. Both registration and CE submission can be completed on the COC website.

Members are required to upload their CE tracking document to the website by December 31 of the year their cycle ends. It is suggested that members use the website to store the tracking document as well as their proof of attendance between submissions, however *only* the tracking document is **required** to be uploaded at the end of the cycle

A CE tracking document that automatically tallies credits is available on the website or from the Office Administrator.

- Orthoptists are responsible for keeping *proof* of all CE activities claimed for 1 year past the end of their cycle. It is recommended that you keep a copy of your submission until your next reporting cycle.
- **10% of orthoptists submitting CE forms will be randomly selected every year for an audit of their CE activities** (see Failed Submissions/Audits page 17 for details).
- The Chair of the CE committee can request proof of CE activities within 1 year of the end of an orthoptist's CE cycle even if the orthoptist was not chosen for audit.
- **All** orthoptists not selected randomly for audit but who have *not* submitted their tracking document by December 31 will be subject to a \$150 late fee and **are required** to submit proof of their CE credit activities by January 31st.

Final approval for a satisfactory passing of a CE submission or auditing thereof will be at the discretion of the CE Committee Chair.

Continuing Education Credit Requirements

CE credits are earned over each member's 3-year cycle (Oct. 1 – Sept. 30).
A minimum of 30 credits is required for each 3-year cycle:

- **A minimum of 20 credits** must be **core** credits (see list of core subjects pg.3).
 - The requirement for 20 core credits reflects the high standards to which the orthoptic profession holds itself, so it follows that the standards for core credits are intentionally rigorous. It is through participation in CE activities that earn core credits that the standards of the profession will be maintained.
 - Whilst it is acceptable to list all of your non-core activities, you can only count a maximum of 10 **non-core credits**. This means that care must be taken to ensure that you have accrued enough core credits and that you have entered credits in the correct column of the electronic form.
- **A maximum of 15 credits** are allowed for **self-study** activities.
 - Please note that “self-study” and “non-verifiable” are not interchangeable terms.
 - Note that self-study activities may be verifiable or non-verifiable and can be core or non-core

For a self study activity to be *verifiable*, there must be a certificate of completion issued. An example of a self-study activity that is verifiable would be reading a journal or viewing a webinar that then either requires a quiz to be completed and submitted or issues a certificate of completion. This acts as proof that the activity occurred. Reading a journal with no such quiz would thus be counted as a non-verifiable activity.

- **A maximum of 10 core credits** are allowed from **non-verifiable** activities (e.g. reading a text or viewing a webinar that does not have an associated quiz or proof of attendance).

Applying for Continuing Education Credits

Individuals and organizations may apply for COC accreditation of continuing education events. In order to receive accreditation a completed application, course hours form, and a detailed agenda including times, speaker names, titles and objectives must be submitted with a non-refundable processing fee to the office administrator of the COC. The application form and payment information are available on the COC website <https://orthopticscanada.org/Continuing-Education>.

If the application is received more than 8 weeks in advance of the event, the application fee is \$100.00. If the application is received less than 8 weeks in advance of the event, the application fee will be \$200.00. Once payment is confirmed, the application is forwarded to the Chair of the CE committee to determine the validity of the application and the number of core and non-core credits granted.

If you are organizing a meeting/event you should ensure that you apply at least 8 weeks in advance. This allows attendees to know in advance that the meeting/event will count towards their CE requirements. If you have applied for CE credits you may state on your advertising that “The organizers of this event have applied for CE credit from the Canadian Orthoptic Council”. Once approved you must include this statement on all advertising and proof of attendance “This event has been approved by the Canadian Orthoptic Council for xx Core CE credits and xx Non-Core CE credits under Section 1”.

If you are attending a meeting/event you should ensure that the course has been, or will be, granted COC credits by contacting the meeting’s organizer.

Meetings/events that have not applied for COC CE credits will not be eligible for core credits.

If the meeting/event organizer has not, or will not, apply to COC for CE credits, an orthoptist planning to attend may do one of the following:

- a. The attendee may apply directly to COC for approval and pay the application fee.
- b. TCOS members may request that TCOS apply and pay the fee on their behalf. This must be done no less than 8 weeks prior to the meeting/event.

Methods of Obtaining CE Credits

Accepted CE credit activities are listed below. The number of credits is based upon the number of hours spent on each activity and their educational merit. The ratios for each activity will be expressed as number of credits awarded to number of hours spent. e.g. 1:2 ratio means that one credit is given for every 2 hours spent on the activity.

Section 1: Attendance at meetings/conferences/lectures/symposia/webinars

Attendance at meetings that have been **accredited** by COC and offer **proof of attendance** will be recognized for *verifiable core or non-core credit* accordingly.

This is a list of learning events that will be accepted *without* accreditation for NON-CORE credit provided that PROOF of ATTENDANCE is issued. (The use of "meeting" is used generically to indicate meeting/conference/lecture/symposia/webinar unless referring to a specific event.)

Meetings:

- 1.1. The Canadian Orthoptic Society (TCOS) Scientific Session & Strabismus Workshop
- 1.2. The Canadian Ophthalmological Society (COS) Annual Meeting
- 1.3. The American Academy of Ophthalmology (AAO) pediatric ophthalmology & strabismus sessions
- 1.4. American Association of Certified Orthoptists (AACO) national or regional meetings and instructional courses
- 1.5. American Association for Pediatric Ophthalmology and Strabismus (AAPOS) annual meeting and workshops
- 1.6. Strabismus symposia co-sponsored by AACO or AOC or TCOS
- 1.7. International Orthoptic Association (IOA) quadrennial meeting
- 1.8. International Strabismological Association (ISA) quadrennial meeting
- 1.9. National orthoptic meetings held in countries outside North America, if approved or sponsored by the local orthoptic or ophthalmological organizations

Other meetings with presentations related to pediatric ophthalmology, strabismus, or neuro-ophthalmology must apply for COC accreditation (see policy regarding applying for accreditation).

Additional considerations:

- ❖ Events that the American Orthoptic Council (AOC) has awarded CE credits will be granted COC credits at “face value” For example, if an AOC event is approved for 6 core credits, the COC will accept it as 6 core credits. (Note exception: this will not apply to JCAHPO or ophthalmic technical education events as stated below).
- ❖ Meetings/events (other than AOC accredited meetings) on the list of accepted meetings that have not applied for COC accreditation will be recognized on a 1:1 basis as **non-core** credits **with proof of attendance**. (Note exception: this will not apply to JCAHPO or ophthalmic technical education events as stated below).
- ❖ JCAHPO as well as other ophthalmic technical education events (whether meetings, webinars, rounds, etc) will **not** be considered valid CE for COC purposes, regardless of whether they have been accredited by the AOC or not. The level that ophthalmic technical activities are taught at does not meet the educational and practice standards that an orthoptist is expected to maintain. Certified orthoptists are encouraged to pursue relevant CE activities that better reflect the core competencies of the profession and that will enhance their knowledge and better inform their clinical practice.

Section 2: Rounds

Attendance at hospital or university rounds in ophthalmology at a 1:1 ratio for a maximum of 5 credits per year. See note below.

Section 3: Journal Club

Participation in journal clubs at a 1:1 ratio for a maximum of 5 credits per year.

Note:

- An employer (manager), Chief Orthoptist and/or the ophthalmologist must verify in writing the orthoptist's attendance and the topics/journals discussed at the meetings (so that the activity can be classified as core or non-core credit) for credits claimed under 2. and 3.
- Ophthalmic technical rounds/activities will not be considered valid CE.

Section 4: Publications and Presentations

4.1) Publishing a paper in a peer-reviewed journal

- i. as first author = 10 credits
- ii. as subsequent author = 5 credits

4.2) Presentation of paper or poster at a COC or AOC accredited meeting (see list above) = 5 credits

4.3) Preparation of instructional course (e.g. workshop, seminar, etc) at a COC or AOC accredited meeting = 1:1 credit (e.g. 2 hour course = 2 credits for preparation)

Note:

You must keep one of the following as proof of publication or presentation.

- a. Acceptance letter for publication or presentation issued by appropriate authority and noting your name, topic and date
- b. Table of contents of publication
- c. Program including your name, host organization name, objectives, date of activity

Section 5: Self-study activities (texts/journals/other paper-based or electronic materials):

A maximum of 15 credits are allowed for self-study activities.

5.1 Reading of any national orthoptic journal = 5 core credits (non-verifiable).

If an available quiz is completed and submitted, then an additional 5 core credits can be claimed for a total of 10 core credits. This activity becomes verifiable if a quiz certificate is issued.

5.2 Reading texts or journals on orthoptics, strabismus or pediatric ophthalmology

- 1:4 ratio, non-verifiable core credits, maximum 5 credits per year

5.3 Completion of AACO self-evaluation quiz = 5 core credits

- Apply directly to AACO Education Chair to get a copy of the quiz and pay fee

5.4 AOC Basic Science DVDs (<http://www.orthoptics.org/BSVideos.htm>)

- This credit may only be claimed once *every other* 3-year cycle (i.e. once every 6 years).
 - i. Non-verifiable core credit awarded 1:1 (i.e. 1 credit per 1 hour of activity) for watching the DVDs
 - ii. If the associated quiz is completed and submitted then 1 hour core credit is awarded per quiz. The viewing activity also then becomes verifiable.

5.5 AAO Basic and Clinical Sciences Course Manuals

Note that:

Each can only be claimed once per 3-year cycle.

The self-assessment quiz must be completed

Only the current version of each manual is acceptable

- i. Completion of AAO Basic Science Course Book 5 = 10 core credits (neuro-ophthalmology)
- ii. Completion of AAO Basic Science Course Book 6 = 10 core credits (pediatric ophthalmology & strabismus)
- iii. Completion of any other volume in AAO series = 5 non-core credits

Section 6: Visit to another orthoptic department

1 hour core credit per half day up to a maximum of 5 credits. Written verification by the chief/lead orthoptist at the department is required.

These credits may be claimed once per 3 year cycle.

Section 7: On a ONE-TME BASIS only

7.1 Completion of S.A.I.T., Centennial College Course for Ophthalmic Medical Assistants (with certificate of completion) = 5 non-core credits

7.2 AAO Home Study Course for Ophthalmic Medical Assistants (with certificate of completion) = 5 non-core credits

7.3 Successful certification as JCAHPO ophthalmic medical assistant (with certificate) at:

- i. assistant level = 5 non-core credits
- ii. technician level = 10 non-core credits
- iii. technologist level = 10 non-core credits

7.4 Completion of a Canadian Orthoptic Master's program qualifies for 15 core credits

Note: COC will recognize a Master's in Orthoptics or Vision Science obtained outside of Canada on a case-by-case basis. The Masters thesis should reflect COC Core topics (refer to list of core subjects. For example, a Masters in Hospital Administration would not be recognized). The orthoptist should contact the CE Committee in advance (certainly prior to the end of their CE reporting cycle) to ensure this activity qualifies to be included in their CE submission.

Orthoptists who decide to pursue medical school, master's degrees, low vision certification or optometry school will not be awarded continuing education credits for those courses/schooling.

QuickGuide to COC list of approved CE Activities

MEETINGS/CONFERENCES/LECTURES/SYMPOSIA/WEBINARS/ROUNDS/JOURNAL CLUBS ([Sections 1,2,3](#))

	Credit:Hour ratio	Verifiable	Core	Non-core	Maximum
Accredited by COC		Y	As approved by CE Chair and listed on proof of attendance		----
Accredited by AOC		Y	Accepted at face value ¹		----
Not accredited by COC or AOC but on the accepted list	1:1	Y	----	Non-core only	----
Hospital or University rounds	1:1	Y	Determined by topics discussed		5/yr
Journal clubs	1:1	Y	Determined by topics discussed		5/yr

1. e.g. AOC approves 6 core credits, then COC accepts at 6 core credits ('face value')
You MUST retain proof of attendance

PUBLICATIONS AND PRESENTATIONS ([Section 4](#) pg 9)

	Credit:Hour ratio	Core	Non-core	Maximum
<u>Publications:</u>				
As first author		10		----
As subsequent author		5		----
<u>Presentations:</u>				
Paper or poster ¹		5		----
Preparation of instructional course ^{1,2}	1:1	Yes		----

1. Must be at a COC or AOC accredited meeting

2. e.g. 2 hr course = 2 credits of preparation

You MUST retain proof of attendance as outlined in Section 4

SELF-STUDY ACTIVITIES (Maximum 15 credits; Core + non-core combined) ([Section 5](#))

	Credit:Hour ratio	Verifiable ^{1,2} Y/N	Core	Non-Core	Maximum
Reading of any national orthoptic journal		N	5		----
Above with quiz		Y with certificate	5		
Reading other journals and texts	1:4	N	Yes		5 credits/yr
AACO self-assessment quiz		Y with certificate	5		
AOC Basic Science DVDs	1:1	N	Yes		Can only be claimed once every 6 yrs
Above with quiz		Y	1/quiz		
AAO Basic Science Course Manuals		Y – self assessment quiz <u>must be</u> completed			Can only be claimed once per 3-yr cycle
i. Book V			10		
ii. Book VI			10		
iii. any other volume				5	

1. Non-verifiable activities accrue to a maximum of 10 credits

2. Activities become verifiable if there is a quiz or certificate of completion issued. Eg. Reading a national orthoptic journal and completing the quiz is now worth 10 verifiable core credits.

OTHER ACTIVITIES ([Sections 6,7](#) pg 11)

	Verifiable	Core	Non-core	Maximum
Visit to another orthoptic department	Y	1/ half day		5 (claimed once per 3yr cycle)
On a ONE TIME BASIS only:				
Completion of S.A.I.T Centennial College Course for Ophthalmic Medical Assisant	Y with certificate		5	
AAO Home Study Course for Ophthalmic Medical Assistants	Y with certificate		5	
JCAHPO medical assistant levels:	Y with certificate			
i. assistant			5	
ii. technician			10	
iii. technologist			10	
Canadian Orthoptic Master's Program	Y	15		
Master's Degree in Orthoptics or Vision Science – obtained outside Canada ¹	Y	15		

1. Program must be approved by COC on a case-by-case basis. Orthoptist should contact CE committee to discuss ahead of time their Program to ensure Masters topic(s) qualifies for inclusion on CE submission.

COC Policy Regarding Failed Submissions/Audits

The COC Executive Administrator (EA) reviews each tri-annual submission for content and credit allotment accuracy. Should submission deficiencies be identified, the EA will assist the orthoptist to amend the submission in an effort to satisfy CE criteria. If the orthoptist's CE activity is still found to be insufficient, the information will be referred to the Chair of the CE committee for further review.

A full audit of CE activity will be carried out for specific submissions:

1. **10% of orthoptists ending their CE cycle who are randomly chosen for full audit.** These orthoptists will be notified of their audit at the time of submission request and must submit all documentation by December 31. Orthoptists not submitting by December 31 will be subject to a \$150 late fee and removed from the public list of certified orthoptists until requirements are met and the late fee is paid.
2. **ALL OTHER orthoptists who have not submitted their documentation by December 31.** Submission of audit requirements and payment of a \$150 late fee is due by January 31. Orthoptists not submitting by January 31 will be removed from the public list of certified orthoptists until requirements are met and the late fee is paid.

Full audits require the orthoptist to submit their tracking document as well as proof of all verifiable activities (ie proof of attendance, proof of quiz, etc).

Process for failed submissions and audits

The Executive Administrator will contact Orthoptists who have not met their CE requirements (including audits), outlining the next steps in the rectification process. In order to return to good standing, the following actions will be required:

1. The orthoptist will need to make-up the credit shortage as **core credits**
2. In addition, the orthoptist will be required to accrue an **additional 5 core credits** from any approved source (refer to guidelines for list of approved CE activity).
3. The activity completed in points (1) and (2) above will be submitted, with proof, within 12 months of the notice of the failed submission to the EA who will consult the Chair of the CE committee to determine if requirements are met.
 - Note: credits accrued as a result of (1) and (2) above cannot be included in the orthoptist's subsequent tri-annual cycle. The orthoptist must submit 30 new credits to meet the requirements of that cycle.
 - Ex.: if an original submission only has 28 approved credits, the orthoptist must then accrue 2 credit shortage + 5 penalty credits (total 7 core credits) in the following 12-month period within a

deadline set by the CE Chair. They then must accrue 30 new credits by the end of their regular subsequent tri-annual cycle.

4. The orthoptist, at their next tri-annual cycle submission, will be automatically included in a mandatory full audit.

Should the submission from (3) above still not meet CE requirements, the orthoptist will then be referred on to the Professional Practice Committee of the Canadian Orthoptic Council for determination of their standing with the COC. This determination may include being **permanently** removed from the list of certified orthoptists in good standing. This determination will be made in writing and sent to the orthoptist via registered mail.

Appeal Process:

An orthoptist can appeal the decision of the CE Chair and/or Chair of the Professional Practice Committee. The orthoptist is required to explain their situation in writing and is encouraged to also offer a plan of amelioration. This is to be submitted to the President of the COC within 30 days of the determination- of-standing decision.

The COC President will then convene an appeal panel consisting of the Executive Committee of the COC (President, President-Elect, Vice President, Secretary Treasurer). All panel members must sign a Conflict of Interest Declaration. The President may select a replacement member of the COC if an executive committee member has an actual or potential conflict of interest. While the Chairs and committee members of either the CE or Professional Practice committees cannot sit on this panel, they may be asked to submit documentation and information regarding their decision at the behest of the COC President. The panel may also request additional information from the applicant orthoptist at any time.

The COC President must acknowledge receipt of this appeal request from the orthoptist by registered mail. The panel will be convened, and a decision made, within 45 days of receiving the appeal request. The panel members will receive copies of all documentation within 10 business days of receipt of the appeal by registered mail. Documentation will include: (1) the appeal request and relevant documentation, (2) decision letters from the Chairs of the CE and Professional Practice committees, (3) any other information/documentation requested by the President. A teleconference will be arranged within 21 days from when the panel receives their documentation for a discussion on the appeal.

Although the appeal is administered via document review, when necessary either the Committee Chairs or the orthoptist may be asked to address the panel at the time it convenes.

The decision of the Appeal Panel is final. It will be communicated to the applicant by the COC President in writing by registered mail (with a copy to the Secretary-Treasurer and Executive Administrator for the COC). If the appeal is successful, the orthoptist will remain in good standing, and will continue on with the regular requirements for certification, including maintenance of CE and submission of annual fees. Should the decision to be removed from the list of orthoptists in good standing be upheld, the orthoptist will be advised of their options.