



ISSUE MEMORANDUM

DATE	November 19, 2021
TO	Members, California State Board of Optometry (CSBO)
FROM	Shara Murphy, Executive Officer
SUBJECT	Agenda Item #5 – Association of Regulatory Boards of Optometry (ARBO) Quarterly Meeting Report

Executive Officer Shara Murphy will provide an update on Association of Regulatory Boards of Optometry meetings.



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A Program of the Association of Regulatory Boards of Optometry for Accreditation of CE

COPE Announces Transition Period for Interactive Online CE

10/29/2021

In response to travel restrictions and many states adopting emergency orders related to COVID-19 in 2020, COPE temporarily modified its format policy to allow COPE Administrators and Accredited Providers to give “live” credit for CE courses that were presented in an interactive distance learning format (i.e. live webinar.) Since in-person CE is resuming and state emergency orders have expired, this temporary policy modification is ending 12/31/2021 and “live” COPE CE will require both learners and instructors to be physically present in the same room.

Although the temporary live policy modification is ending, COPE will not be reverting back to all original format policies in 2022. The COPE Governing Committee is working on a proposal for permanent changes to COPE’s format requirements in response to the ever-changing CE landscape and learning technology. **The period of 1/1/2022-6/30/2022 will be a transition period for the COPE Governing Committee to complete research, develop a proposal, and collect stakeholder feedback on proposed format changes. During this 6-month transition period, post-course tests will NOT be required for COPE Accredited INTERACTIVE DISTANCE LEARNING courses/activities.**

In order to be considered INTERACTIVE Distance Learning by COPE, a course must have synchronous learning (the learners and the instructor(s) attend together at the same time). Attendees must be able to have immediate interaction with the instructor (i.e. live webinar). The activity can only be presented at one specified time, and once it has taken place, the learners may no longer participate in that activity. CE Providers must have a way to confirm the learners’ attendance for every course before issuing certificates of attendance. The post-course test will not be required during the transition period, as mentioned in the above paragraph.

Courses that are asynchronous learning and do not meet the requirements for interactivity above are considered by COPE to be ENDURING DISTANCE LEARNING courses. Recorded webinars are an example of ENDURING Distance Learning activities where there is no immediate interaction with the instructor and participants can choose when to participate. During the transition period, ENDURING DISTANCE LEARNING courses will still be required to have a post-course test that has been reviewed by a school of optometry, medicine, pharmacy or osteopathy.

COPE feels that the quality of education is more important than the location of the course. COPE Accreditation is based on developing CE activities around optometrist’s educational needs and professional practice gaps in conjunction with assessing outcomes and applying quality improvement measures. Continuing education delivery methods changed during the COVID-19 pandemic and technology now allows for immediate interaction with a course instructor regardless of learners being present in the same room. During the pandemic, optometrists were still able to participate in COPE Accredited CE activities, and many of them reported that they learned just as much, or more, in a virtual environment than they previously did in a face-to-face environment. However, CE requirements for license renewal are set by the Optometric State and Provincial Licensing Boards, and many of these boards still limit the number of online hours that will apply for license renewal regardless of whether the CE activity is interactive.

Please note that although COPE's policy is being modified during the transition period to not require a post-course test for INTERACTIVE DISTANCE LEARNING courses, individual State and Provincial Licensing Boards may have different rules. COPE advises optometrists to contact the State or Provincial Board where they are licensed for verification of what is acceptable for license renewal. If you have any questions about COPE's transition period please contact Sierra Powell, Manager of Accreditation Services, at spowell@arbo.org.



Guidelines for Interactive Distance Learning Activities During COPE's Transition Period (1/1/2022-6/30/2022)

COPE Administrators and Accredited Providers who are planning to present Interactive Distance Learning CE courses must follow these guidelines:

- Courses and activities should be submitted to COPE as Interactive Distance Learning.
- Post-course tests will not be required for Interactive Distance Learning courses during the transition period.
 - If your activity begins during the transition period, a post-course test will not be required by COPE regardless of when your activity ends.
- The required pre- and post-activity data must be submitted to COPE and approved for activities to be considered COPE Accredited.
- CEE (transcript quality or certified CE) courses must be presented in person, face-to-face, per State Board requirements regarding CEE.

IMPORTANT: Please note that although COPE's policy is being modified during the transition period to not require a post-course test for Interactive Distance Learning courses, individual Licensing Boards may have different rules. COPE advises optometrists to contact the State or Provincial Board where they are licensed for verification of what is acceptable for license renewal.

Guidance on Interactive Distance Learning CE Activities for COPE Administrators/Providers

In order to be considered interactive, the course must use synchronous learning; attendees must be able to have immediate interaction with the instructor (i.e. live webinar). The activity can only be presented at one specified time, and once it has taken place the learners may no longer participate in that activity. COPE Administrators/Providers must have a way to confirm the learners' attendance for every course before issuing certificates of attendance. Post-course tests are not required for this type of activity during the transition period.

The following information is available for COPE Administrators/Providers that are presenting interactive distance learning CE activities.

Interactive Distance Learning Activities

COPE Administrators/Providers offering Interactive Distance Learning CE activities must provide:

- A mechanism for real-time participant interaction with instructors—for example, through a chat function.
- Participant access to technical assistance for the webinar or streaming platform throughout the activity.

- No “commercial breaks” or embedded advertising within the CE activities (however, acknowledgement of commercial support is permitted). **Note:** Promotional/marketing presentations may take place before or after the education as long as there is a clear break between the education and the promotional/marketing presentation. The attendees must not be required to attend the promotional/marketing presentation in order to receive CE credit.

COPE Administrators/Providers must also ensure that all COPE requirements for CE activities are met. These include, but are not limited to:

- Following the COPE Standards for Commercial Support;
- Providing a method for participants to evaluate the effectiveness of the activity;
- Verifying the learners that participated in the activity.
 - A registration list is not sufficient to know who actually attended the activity.
 - Choose a platform that gives you a list of attendees. Ask all attendees to use their full name as their screen name (as opposed to an email address or just first name) so you can track who attended.
 - Consider asking short questions periodically during the presentation and having your attendees respond using the chat function to track their attendance throughout the course. Most platforms allow you to save the chat to refer to later.
 - Questions should not be too lengthy or detailed as not to distract from the presentation.
- Ensuring that the length of the course matches the number of hours (or partial hours) that were submitted to COPE.
- Issuing a certificate of attendance to those who participated or submitting an attendance spreadsheet to ARBO.

Guidance on Enduring Distance Learning CE activities for COPE Administrators/Providers

For courses and activities with asynchronous learning where there is NOT immediate interaction with the instructor (i.e. recorded webinar), COPE Administrators/Providers should follow COPE’s rules regarding Enduring Distance Learning. If a COPE Administrator/Provider records an interactive distance learning CE activity and then releases the recording for those who were not able to participate in the interactive broadcast, the recording is considered an Enduring Distance Learning activity and a post-course test is required by COPE.

Enduring Online CE activities

COPE Administrators/Providers presenting Enduring Distance Learning activities must meet all of COPE’s Enduring Distance Learning requirements including but not limited to:

- Courses must include a post-course test to verify learning.
- Post-course tests and answer keys must be reviewed by an accredited school of optometry, medicine, pharmacy or osteopathy.

If you have questions about the COPE transition period, please contact Sierra Powell, Manager of Accreditation Services, at spowell@arbo.org.

Best Practices for Creating a Virtual Meeting - Tips for CE Providers

1. **Choose a webinar/virtual platform that can accommodate your group size and helps you meet your educational goals.**

Will you use video? Will you have small groups or breakouts? Do you need polling features?

2. **If you're using a webinar/virtual platform that is new to you, explore its features using the company's tutorials.**

Many platforms offer interactive training webinars where you can address any questions or concerns you may have in real time.

3. **Test in advance.**

Test any aspect of the technology that you plan to use, such as: Video, Sound, Recording, Polling Features.

4. **Provide support to remote faculty who are connecting, recording, using webcams, etc.**

Send guidance to your instructors or facilitate the startup for them. Plan a briefing before the session to confirm all faculty can connect and review your plan for the meeting.

5. **Identify a "Meeting Leader".**

The Meeting Leader should help to facilitate questions and make sure that your meeting stays on topic and on time.

6. **Avoid Background Noise.**

You can mute attendees or encourage them to mute themselves to ensure that learners and faculty have clear lines of audio communication during the meeting.

7. **Stay on Schedule.**

This will ensure that you cover your full agenda while remaining respectful of everyone's time.

Best Practices for Planning and Leading A Virtual Meeting - Tips for Instructors

1. Audio/Video/Connection:

- a. Circulate meeting guidelines if possible
- b. Join by computer even if just participating with audio
- c. Instruct participants NOT to join by BOTH video and phone
- d. Encourage headsets
- e. Mute when not speaking

2. On the webinar:

- a. Use video
- b. Use the chat function
- c. Use polling functions or services to facilitate interactivity
- d. Consider using the pointer or pen/highlighter
- e. Have more than one "host" to ensure a back-up in case of connectivity issues
- f. Limit didactic time & expand discussion time/Q&A.
- g. Ask participants to type what they learned in the comment box.