



GLOSSARY OF COPE TERMS

Accreditation Review Committee

The committee that reviews data and information submitted for Provider and Activity Accreditation and makes accreditation determinations that are ratified by the ARBO Board of Directors. The Accreditation Review Committee is comprised of members of the ARBO Staff, members of the COPE Committee, members of the Accredited Provider/Administrator community, and other stakeholders from the optometric profession. The Accreditation Review Committee must complete training, prior to participating in the accreditation decision process, to ensure that all accreditation determinations are made in a consistent manner in accordance with COPE Accreditation Criteria and COPE Standards for Commercial Support.

Activity Number

Each activity shall be given a unique identification number. All documentation provided to an optometrist for submission to a licensing board, such as a certificate of attendance slip, must include the COPE activity number.

COPE Administrators will obtain an activity number once their Pre-Activity Accreditation Form has been reviewed and approved.

Accredited Providers will obtain activity numbers from COPE prior to their activity taking place.

ARBO

The Association of Regulatory Boards of Optometry (ARBO®) is a 501(c)(3) not-for-profit association of regulatory boards of optometry. ARBO's mission is to represent and assist member licensing agencies in regulating the practice of optometry for the public welfare. ARBO created COPE in 1993 as a service to its member licensing boards; COPE is entirely administered from ARBO's administrative offices.

Commercial Interest

A commercial interest is any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients. Providers of clinical service directly to patients are not considered commercial interest. A commercial interest is not eligible to become an approved COPE Administrator/Provider and cannot control the educational content for COPE Approved CE. Under this definition, the following types of organizations are eligible for become approved COPE Administrators/Providers and free to control the content of COPE Approved CE:

- 501(c) Non-profit organizations (Note: 501(c) organizations are screened for eligibility. Those that advocate for commercial interests as a 501(c) organization are not eligible to become COPE Approved Administrators/ Providers. They cannot serve in the role of joint sponsor, but can be a commercial supporter.)
- Government organizations
- Non-health care related companies
- Liability insurance providers
- Health insurance providers
- Group optometric or medical practices
- For-profit hospitals
- For-profit rehabilitation centers
- For-profit nursing homes



- Blood banks
- Diagnostic laboratories

Commercial Supporter

Any proprietary entity providing educational grants to COPE Administrators and Accredited Providers.

Competence

The ability of a physician to combine knowledge, strategies and skills into action if called to do so. Competence may also be defined as “knowing how” to do something or what the physician would do given the opportunity to do so. For further reference, see: *Miller GE. The assessment of clinical skills/competence/performance. Acad. Med. 1990; 65(9 Suppl.):S63-7*

Conflict of Interest

A conflict of interest is created when an individual has an opportunity to affect CE content about products or services of a commercial interest with which he/she has a financial relationship. COPE considers ‘CE content about products or services of a commercial interest’ to include content about specific agents/devices, but not necessarily about the class of agents/devices, and not necessarily content about the whole disease class in which those agents/devices are used.

COPE®

The Council on Optometric Practitioner Education (COPE®) is a program of the Association of Regulatory Boards of Optometry (ARBO®). COPE accredits continuing optometric education providers and activities on behalf of optometric licensing boards.

COPE Accredited CE

Continuing education activities produced and delivered by COPE Administrators and Providers in compliance with the COPE Accreditation Criteria, Standards for Commercial Support, policies and procedures.

COPE Activity

An educational event or publication produced by a COPE Administrator or Provider in accordance with the COPE Accreditation Criteria, Standards for Commercial Support, policies and procedures.

COPE Administrator

The organization, group or entity assuming overall responsibility for program planning, promotion, on-site administration and financial management of CE activities who submits their activities individually for COPE accreditation.

COPE Advisory Committee

A committee established to give meaningful interprofessional input to the COPE Accreditation process. This committee has representation from the COPE Committee, COPE Provider, and COPE Administrator organizations. The Advisory Committee also serves as a peer review committee for appeals in case of COPE investigations of reported non-compliance.

COPE Course

A structured, educational session/intervention specifically designed to impart new knowledge, shared experiences or factual evidence, which is used maintain the level of optometric competence consistent with the statutory requirements of a given state law



defining optometry.

COPE Provider

The organization, group, or entity assuming overall responsibility for program planning, promotion, on-site administration, and financial management of CE activities and who has successfully completed the COPE Provider Accreditation process.

Course Category

Each COPE Course is categorized into a generalized content area developed by COPE to meet the CE requirements for practitioner re-licensure of participating boards of optometry. Courses are categorized according to the major emphasis of the course content. Courses may be reallocated to a different content area by COPE during the review process, or at any point subsequent to its acceptance.

Course Demographics

Key course information entered into COPE's database that is made available to regulatory boards of optometry (attendance and course authentication), program providers (future program planning), and general practitioners (future CE program attendance planning).

Course Description

A brief statement of what the instructor(s) intends to present. It is a thumbnail sketch summarizing the course which is suitable for publishing.

Course Format

The method used to physically teach a course. COPE uses the following specific format definitions.

- A. **LIVE:** A live format is when the instructor is in the same room with the participants, even if other formats are used as audiovisual aids for teaching the course. The instructor is face-to-face with the audience and can touch the participants.
 1. **CE:** There is no post-course test.
 2. **CEE (Continuing Education with Examination):** There is a post-course test.

- B. **DISTANCE LEARNING/MULTIMEDIA:** The course instructor is not physically present (not face to face).
 1. **Interactive Distance Learning:**
 - **Examples:** Webinar, video conference, teleconference, or other format that allows for immediate interaction and feedback between the audience and the instructor. Once the event has taken place, learners may no longer participate in that activity.
 2. **Enduring Distance Learning (Non-Interactive):**
 - **Examples:** Webcast, podcast, video, journal, website, written or other format that provides one-way content to the audience without immediate interaction with the instructor. There is not just one time on one day to participate in the activity, rather, the participant determines when he/she participates.

Course Number

COPE utilizes identification numbers to uniquely identify the courses, articles or other



educational interventions. The course number is combined with the course category designation and must be listed on all certificates of attendance. (Example 12345-GL) Optometric licensing boards require the unique identification numbers in verification of maintenance of licensure.

Course Outline

A course outline is a basic guide to the key learning elements contained in a course. Usually laid out in bullet format, a course outline should be in sufficient detail so as to permit either the participant or an observer the ability to clearly follow along throughout the presentation. An outline can be considered sufficiently detailed if an observer is able to enter the presentation and after 5 or 10 minutes be able to locate where in the outline the presenter is. As a rough guide, a 1.5 to 2 page outline is typical for a one-hour course.

Course Presentation

The method used to present the information in a course. More than one presentation method can be used in a course. This information is used by many optometric licensing boards as part of the process of approval of accredited CE for license renewal.

COPE utilizes the following specific definitions for course presentations:

CD-DVD: A presentation recorded on a CD-ROM or DVD that provides one way content to the learner.

GRAND ROUNDS: A presentation of clinical cases involving actual patient encounters, and the discussion of the diagnosis and treatment of that particular patient condition.

HANDS-ON WORKSHOP: A laboratory that emphasizes the demonstration and application of hands-on techniques and skills in optometric procedures and instrumentation.

LECTURE: A discourse given before an audience for the purposes of instruction in an area of study with one or more instructors.

ONLINE: The presentation of clinical cases or information related to professional eye care delivered solely via the Internet.

PANEL: A discourse in a given area of study, presented by usually three or more simultaneous instructors.

POSTERS: The presentation of a poster at a scientific meeting. Authors must be present with the leading author meeting the COPE criteria. Interactivity is required for credit.

SYMPOSIA: A presentation usually by multiple persons on numerous topics, each presented in a short time frame.

WRITTEN: The presentation of clinical cases or information related to professional eye care solely in a written (printed/typeset), or electronically recorded format.

Course Review

A service provided by COPE to validate clinical content of COPE Courses. COPE Reviewers will review the course learning materials prior to an activity to assure that the course has educational and scientific integrity, that the course contains customary/generally accepted optometric and



medical practices, and that the course is in compliance with the COPE Standards for Commercial Support.

Credit Hour

COPE hours/units are defined in the following increments:

| Hours/Units of Credit | Minutes of Instructional Time |
|------------------------------|--------------------------------------|
| 0.25 hours/units | 15 minutes |
| 0.50 hours/units | 25 minutes |
| 0.75 hours/units | 40 minutes |
| 1.00 hours/units | 50 minutes |
| 1.25 hours/units | 65 minutes |
| 1.50 hours/units | 75 minutes |
| 1.75 hours/units | 90 minutes |
| 2.00 hours/units | 100 minutes |

Curriculum Vitae (CV)

A CV is a detailed chronological history of a person's educational and teaching experience, and professional accomplishments which qualifies the instructor to teach the course (not a biographical sketch).

Informatics

As defined by the U.S. National Library of Medicine, health informatics is the interdisciplinary study of the design, development, adoption, and application of IT-based innovations in healthcare services delivery, management, and planning.

Instructor

The person (or persons) who actually teaches the course, and who assumes responsibility for the educational content and method of presentation of the course.

Knowledge

Facts and information acquired by a learner through experience or education.

For further reference, see: *Miller GE. The assessment of clinical skills/competence/performance. Acad. Med. 1990; 65(9 Suppl.):S63-7.*

Performance

The demonstration of physician competence in clinical practice. It may also be defined as what the optometrist actually does in clinical practice. For further reference, see: *Miller GE. The assessment of clinical skills/competence/performance. Acad. Med. 1990; 65(9 Suppl.):S63-7*

Performance in Practice Activity Review Form

The form submitted by providers, in addition to the Self Study Report, to demonstrate that they are implementing the accreditation criteria within actual educational interventions/sessions.

Practice Gap

The difference between what optometrists are doing or accomplishing compared to what is achievable on the basis of current professional knowledge. A practice gap is an educational need that a physician knows they have or that a provider deduces from data. A practice gap is a description of a problem in practice that the administrator or provider will address with an educational intervention. Professional practice gaps can be clinical or non-clinical.



NOTE: Although citing knowledge as a practice gap is acceptable for some educational interventions, administrators and providers must demonstrate that their overall programs are based on practice gaps in the areas of optometric competence, performance, and/or patient outcomes.

Pre-Activity Accreditation Form

The document utilized by COPE Administrators to demonstrate that they are implementing the accreditation criteria within the initial planning of an educational activity/intervention.

Post-Activity Accreditation Form

The document submitted by COPE Administrators within 30 days of the completion of the educational intervention/session to demonstrate full compliance of the accreditation criteria including a post-activity educational outcomes assessment.

Probation

One of the potential accreditation determinations given to Accredited Providers and Administrators that have serious problems meeting COPE accreditation requirements. The Accredited Provider or Administrator must correct the noncompliance issues in order to achieve accreditation. Probation may also be given to Accredited Providers whose progress reports are rejected.

Relevant Financial Relationships

Financial relationships are those relationships in which the individual benefits by receiving a salary, royalty, intellectual property rights, consulting fee, honoraria, ownership interest (e.g. stocks, stock options or other ownership interest excluding diversified mutual funds), or other financial benefit. Financial benefits are usually associated with roles such as employment, management position, independent contractor (including contracted research), consulting, speaking and teaching, membership of advisory committees or review panels, board membership, and other activities from which remuneration is received or expected. COPE considers relationships of the person involved in the CE activity to include financial relationships of a spouse or partner.

With respect to personal financial relationships, 'contracted research' includes research funding where the institution gets the grant and manages the funds and the person is the principal or named investigator on the grant.

With respect to financial relationships with commercial interests, when a person divests themselves of a relationship it is immediately not relevant to conflicts of interest but it must be disclosed to the learners for 12 months.

Reviewer

A COPE recognized and licensing board-endorsed optometrist or a faculty at an optometric school or college who has completed the COPE Reviewer training program successfully.

COPE Reviewers serve indefinitely but must periodically re-certify to continue as a COPE Reviewer. They are not compensated for their service. COPE Reviewers serve two primary functions. COPE Reviewers validate clinical content in courses submitted to COPE through the Course Review Program and also provide objective feedback via direct observation of a COPE Activity regarding compliance with COPE Accreditation Criteria, Standards for Commercial Support, and policies.