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This guide is intended to provide policies, guidelines and key information and to answer common questions the optometric assistant (OA) or the sponsoring Optometrist may have about the CCOA Program.

Please take a moment to review it, and keep it with your study materials. You will be directed to this resource periodically throughout the program. We are here to help if more information is needed.



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CANADIAN ASSOCIATION OF OPTOMETRISTS
ASSOCIATION CANADIENNE DES OPTOMÉTRISTES

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1.1 Introduction

An optometric assistant (OA) is an individual specially trained in vision care who assists optometrists in the provision of full scope optometric services to patients. OAs help optometrists offer a greater range of services in a more efficient and effective manner.

The Canadian Certified Optometric Assistant (CCOA®) Program is a member benefit of the Canadian Association of Optometrists (CAO). Our long range goal is to improve the quality and efficiency of vision care in Canada by upgrading optometric assistants to become highly trained and specialized personnel.

The CCOA Program is administered in Canada to OAs on the members' behalf. As such, the sponsoring OD shall be entitled to request and receive information about the registrant's progress at any time during the course. In the event a request is made, the OA will be copied in the reply. Where necessary, the CCOA Program may contact the sponsoring optometrist with regard to the registrant. Registration with the CCOA Program is entirely dependent upon the OA remaining employed and sponsored by a CAO member optometrist for the duration of the program, including the CCOA Examination.

In an online remote learning course most of the practical knowledge will come from hands on office experience under the guidance of a supervisor. The course material will give the framework of knowledge which the assistant can build upon. Receiving guidance from the supervisor will allow the academic and practical aspects of this program to be integrated.

A Canadian Certified Optometric Assistant (CCOA) certificate, valid for three years, will be issued upon successful completion of; all nine modules, full workshop attendance, and CCOA Examination. To maintain the CCOA designation, 18 hours of Continuing Education credits including CPR must be submitted on time every 3 years (fee applies). If renewal requirements are met, a replacement CCOA certificate, valid for three years will be issued. Failure to maintain current CCOA status forfeits the legal right to use the CCOA designation, and the certificate is no longer recognized.

1.2 Required Resources

Each Registrant must have:

1. Textbook: *System for Ophthalmic Dispensing, Third Edition*, Brooks & Borish
2. Textbook: *The Ophthalmic Assistant, 9th Edition*, Stein, Stein & Freeman
3. CCOA Program Study Guides for each course module (download from website)
4. Module Assignments (complete on website)
5. Practical Skills Checklist (download from website)
6. A pre-fitted RGP contact lens to practice insertion and removal techniques (for Workshop & Module 8)
7. Opportunity to routinely practice skills in the area of the optometric setting pertaining to the Module of study

1.3 Full Course Registration vs. Individual Module Registration

The **Full Course curriculum and registration fee** includes CCOA Program Study Guides & open-book Assignments for all nine Modules, Practical Skills Checklists, practical skills Workshop, and closed-book CCOA Examination.

The nine module sessions are 4 weeks duration. For the Full Course curriculum, the schedule begins with Module 1 on September 15th, 2016. Module sessions are back-to-back, finishing with Module 9 in the spring. The online CCOA Examination is written within a 2-week period in June.

Registration for the Individual Module curriculum provides the registrant flexibility in choosing which Module and when to register, allowing for a slower pace. Modules do not have to be taken in sequence. Each Module assignment and practical skills checklist must be completed within the specified 4 weeks before registering for the next module. To be eligible to write the online CCOA Examination in June (at additional cost), all 9 Modules must be successfully completed, and a full Workshop attended. If an overall grade of 75% or greater is achieved, they will earn the CCOA certificate and designation. The overall cost of becoming a CCOA with Individual Module registration is significantly higher than taking Full Course. However, the assistant is able to learn at a slower pace. Because the course content is frequently updated, the Individual Module registrant must complete all modules within 24 months to qualify for the CCOA Examination.

Access to the latest edition of the textbooks is mandatory for all registrants to complete the course Modules. Textbooks may be ordered online through www.lb.ca/cao. Both textbooks are available in e-book and hardcopy versions.

Full Course Schedule: Assignment/Practical Skills Due Dates

	Content Delivery Date (available as of)	Submission Deadline
Module 1	Sept 15	Oct 13
Module 2	Oct 13	Nov 10
Module 3	Nov 10	Dec 8
Module 4	Dec 8	Jan 5
Module 5	Jan 5	Feb 2
Module 6	Feb 2	March 2
Module 7	March 2	March 30
Module 8	March 30	Apr 27
Module 9	Apr 27	May 25
Register for Workshop	Options Released: Early November	Registration Deadline: Dec 1
Attend 2-day Workshop		Jan - Apr (attend 1 event)
Register Exam Date deadline	Begins May 26	June 14
CCOA Examination		Written Between Jun 15-30
CCOA Exam Rewrite (fee applies)		Written Between June 15-July 15

**Due date will be indicated on the students dashboard. Note that the appropriate modules will be unlocked in your portal on the dates listed below.*

Individual Module Registrant Schedule: Assignment & Practical Skills Due Dates

Module	Deadline
Module 1 Assignment	4 weeks from registration
Module 2 Assignment	4 weeks from registration
Module 3 Assignment	4 weeks from registration
Module 4 Assignment	4 weeks from registration
Module 5 Assignment	4 weeks from registration
Module 6 Assignment	4 weeks from registration
Module 7 Assignment	4 weeks from registration
Module 8 Assignment	4 weeks from registration
Module 9 Assignment	4 weeks from registration
Register for Workshop (fee applies)	Early November
Attend 2-day Workshop	Jan - Apr (attend 1 event)
Register Exam Date (fee applies)	May 26-June 14
CCOA Examination	Written Between Jun 15-30
CCOA Exam Rewrite (fee applies)	Written Between Jun 15-July 15

**Due date will be indicated on the students dashboard.*

Full Course Registrant Important note: Final exams and rewrites are only conducted between June 15th and July 15th. Those who are unable to obtain a passing overall grade of 75% will not obtain the CCOA credential. A maximum of 2 rewrites are permitted.

Individual Module Registrant Important note: Final exams and rewrites are only conducted between June 15th and July 15th. Those who are unable to obtain a passing overall grade of 75% will not obtain the CCOA credential. A maximum of 2 rewrites are permitted.

1.4 Program Module Synopsis

The CCOA Program is designed to provide participants with an understanding of the fundamentals of optometric assisting. It will provide assistants with an in-depth knowledge of various equipment, procedures and techniques needed to function smoothly and efficiently in an optometric office.

The Practical Skills Checklist component for most Modules is intended to develop hands-on skills as the assistant applies the theory learned from the required reading. It is critical that the assistant is given opportunity to work under supervision in the areas of the clinic pertaining to the Module they are studying.

The study plan and assignments are structured upon the learning objectives for each module. Assignment questions are based upon the required reading as listed in the Study Guide and course text books.

Each module assignment must be completed online and submitted via the CCOA dashboard. Late assignments will not be accepted and will score a mark of zero. (See detailed information in the Module Assignment Standards section)

1.4.1 Introductory Course – Module 1 (4 weeks)

This introductory module gives an overview of the profession of optometry and defines the roles and importance of the 3 Os. Medical, ophthalmic, and optical terminology as well as ocular anatomy and physiology are reviewed. This module covers office procedures, such as customer service and administrative tasks including; patient intake and flow, scheduling and referrals, recall systems, and the management of patient records and privacy. An overview of the certification program as well as the role of the optometric assistant are discussed.

1.4.2 Pretesting – Module 2 (4 weeks)

Covers preliminary optometric testing techniques including case history, visual acuity, contrast sensitivity, color vision, and stereopsis. Additional procedures such as eye drop administration,

blood pressure testing, and infection control are reviewed. Automated instruments such as the refractor, keratometer, and non-contact tonometer are introduced.

1.4.3 Supplementary Testing – Module 3 (4 weeks)

Introduces supplemental optometric tests including: visual fields, digital imaging systems (OCT, HRT, corneal topography, fundus photography) and pachymetry.

1.4.4 Refraction and Ocular Health – Module 4 (4 weeks)

Explores common eye conditions, children's and senior's vision, pharmacology, triage and referrals. After this module, assistants will have a comprehensive understanding of eye examinations

1.4.5 Ophthalmic Lenses – Module 5 (4 weeks)

Provides a background in basic optics and covers ophthalmic lens designs, treatments, speciality lenses and troubleshooting. After this module, the assistant will be able to make recommendations and select the appropriate lenses to meet various patient needs.

1.4.6 Ophthalmic Frames – Module 6 (4 weeks)

Techniques required to dispense and adjust ophthalmic frames including: learning frame parts, repairs, selection and troubleshooting. Frame inventory and communication with vendors is discussed. After this module, the assistant will be able to assist in appropriate frame selection and maintenance.

1.4.7 Ophthalmic Finishing Lab – Module 7 (4 weeks)

Standard and automated lensometry as well as the lab work involved in producing a finished lens product. After this module, the assistant will be able to verify the quality of finished eyewear.

1.4.8 Contact Lenses – Module 8 (4 weeks)

Ocular anatomy and physiology as it pertains to contact lenses. Types of contact lenses, uses care systems, hygiene, and insertion and removal techniques are reviewed. After this module, the assistant will have a thorough understanding of contact lenses, as well as the ability to instruct patient fittings and manage trials lenses and inventory.

1.4.9 Business/Retail – Module 9 (4 weeks)

Administrative processes such as sales techniques, and maintaining inventory, billing and insurance plans. Patient communication strategies for dealing with challenging patients is reviewed. After this module, the assistant will be able to manage the business of an optometric business!

The Practical Skills Checklist (component of each Module)

Note that Modules 1, 4 and 9 do not include a checklist. The links will be available on the students' dashboard. The checklists should be printed. All skills listed are required learning objectives. The checklists are to be completed as the registrant works through each module session. Each skill is demonstrated and examined by the sponsoring optometrist or a CCOA. The examiner must initial and date the checklist once each skill has been mastered.

Submitting your Checklists

The deadline to submit your PSC is the same as the corresponding modules deadline. It must be submitted via your portal.

Lack of equipment

All registrants are required to be trained to standards set forth by the CCOA Program committee, which includes mastery of ALL skills in the checklist to be eligible to earn CCOA designation. If fulfilling some of the skill requirements within the clinic environment is problematic due to lack of equipment, it is recommended that the supervising optometrist locate an optometric office in your area for you to be able to learn these skills.

1.4.10 Authorized examiners

All examiners must identify themselves by completing the information on the second page of the Practical Skills Checklists.

Examiners are restricted to:

- CAO member optometrist or;
- CCOA (Canadian Certified Optometric Assistant) in good standing*, working under the direct supervision of the sponsoring OD.

1.4.11 Module Assignment Standards

An overall mark of 75% is required to pass the course. **Course grades** are weighted as follows:

- Module assignments 40%
- CCOA Examination 60%

The purpose of the **open book** module assignment is to facilitate the learning process as well as assess the assistant's knowledge and abilities in the optometric field. Each assignment consists of 25 multiple choice questions to be answered by the assistant. Questions are based upon the **required reading** for the specific Module component of the course, which is listed at the beginning of the Study Guide for each module.

The assignment for each module is available online at the same time as the Module Study Guide and Practical Skills Checklist (if applicable). Content should be printed and saved for future reference. Content is only available online during the specific timelines listed in the Due Date grids in page 8 and 9 of this guide. Answer keys linked to each module will be released the day after each deadline. To access the answer key, simply click on the grade associated with the module at hand (grade is located on the dashboard).

The **assignment marks will be available immediately after submission via email** and on your dashboard. Your Sponsoring Optometrists will be CC'd on this email.

Support from an Instructor

Should you need help with your assignments, please contact us: ccoa@opto.ca. A CCOA Program instructor will not provide the answer, but will direct you to the reference location in the course material, and can be available to offer guidance.

1.4.12 Late Assignments and Requests for Due Date Extension

Module assignments must be uploaded into your portal by the indicated due date or the assignment is forfeited and scored as incomplete and graded 0/25. In the event that the assignment due date cannot be met, the registrant is required to submit a written request for an extension including the reason. The CCOA Program reserves the right to share related communication with the sponsoring optometrist. All requests must be emailed to ccoa@opto.ca **prior to** the assignment due date.

1.5 Workshop

Winter Workshops are held in these locations (pending minimum attendance):

The CCOA Program workshop is designed to further develop your practical skills and to review the critical components of each module. Assistants should expect to enjoy themselves and to find it an exciting learning experience. Each workshop is 2 days in length, usually held on Saturday/Sunday. The full agenda must be attended to be eligible to sit for the CCOA Examination.

January 14-15, 2017	Vancouver, BC
January 28-29, 2017	Saskatoon, SK
February 11-12, 2017	Calgary, AB
February 25-26, 2017	Toronto, ON
March 25-26, 2017	Halifax, NS (Biennial, 2017, 2019)

1.5.1 Workshop Registration

Once venues have been arranged, the CCOA Program will contact registrants with instructions to register for one workshop of their choice (early November). You are welcome to attend any workshop offered.

Contact ccoa@opto.ca if you have not received Registration Instructions by **Dec 5th**

You will be provided a list of items to bring, since the CCOA Program does not provide all training materials. These include:

1. **One pre-fitted GP contact lens (either eye) with the fit verified and signed off by your Optometrist.** You will use the lens to demonstrate insertion and removal techniques on yourself and others. Allow 4-6 weeks for the lens to be ordered and the fit checked on your eye by your OD. The optometrist will insert and remove the lens for you and ensure that the lens fits appropriately, **in the same manner as a patient would be fitted.** This ensures your safety during contact lens insertion and removal training at the workshop. It is not necessary to have the correct Rx. However, the fit of the lens is critically important to your success during training.
2. Prior to attending the workshop, you will be required to sign a waiver.
3. Be sure to clean and disinfect the RGP lens and case once the fitting has been done. For your safety and others, you will not be permitted to participate at the workshop if your lens has not been disinfected.
4. **Use of corneal anesthetic drops is NOT permitted at the workshop.**

Mandatory Workshop Items Include:

- A calculator (not your cell phone).
- A sterile GP lens (see comment box above) **and** a GP care kit **and** a case;
- 2 sealed disposable soft lenses **and** a soft lens care kit **and** a case;
- 2 sealed sample-sized bottles of artificial tears.
- A water soluble fine point felt tip marker (for marking lenses)
- 2 or more clean metal frames with Rx / adjustable nose pads for frame adjusting (from your donation box)

1.5.3 Workshop Costs

The cost of the workshop is included in the Full Course registration fee. Individual Module Registrants are subject to current Workshop Registration fees.

Accommodation, transportation and meals are the registrant's responsibility. The promotional rate for guestrooms and the deadline for making your reservation at the specified rate will be listed in the workshop registration email you will receive. You are welcome to consider alternate accommodations if desired, but be sure you are able to arrive at the Workshop for the specified start time each day.

Dietary Requirements

Refreshments are provided to registrants. If you have specific dietary restrictions for medical reasons, or if you have food sensitivities or allergies that may put you at risk, it is your responsibility to let us know. Contact us by email ccoa@opto.ca at least 21 days in advance of the event so that your needs can be accommodated appropriately. Be sure to specify which workshop you are attending, and include a contact phone number in case we need more information from you.

1.5.4 Rescheduling or Cancelling Workshop Registration

We need advance notice to be able to cancel your seat without incurring financial penalty by the hotel. **Therefore, we require 14 business days advance written notice (email) to cancel or change your workshop registration. Otherwise, you will be responsible for the full cost of attending an alternate workshop.**

Your options for changing workshops include attending a different event, pending available seating.

1.5.5 Failure to Attend the Workshop

Registrants will be required to pay the entire cost of attending a future workshop if they:

- fail to appear for the full workshop for which they have been registered, and do not provide at least 14 business days advance written notice to ccoa@opto.ca
- do not attend the full daily agenda for each day of the workshop (arrive late, leave early)

Workshop Agenda

The workshop agenda will be emailed prior to each event.

1.6 Exam

1.6.1 CCOA Examination Standards

The CCOA Examination is written on a pre-agreed date from June 15 – 30. The final exam can be written from the registrants' home as it is not a proctored exam. Full instructions for booking the exam writing date will be sent in May. The deadline to register your exam writing date is June 14, 2017.

The CCOA Examination:

- Is online (via your dashboard)
- **is closed book**
- contains 100 multiple choice questions
- has a 2 hour time limit
- covers general knowledge and content from all nine course modules
- **Is NOT proctored**

To qualify to sit for the exam, the registrant will have:

- submitted all nine module assignments
- attended a complete Workshop
- Submitted all Practical Skills Checklists
- remained employed by the sponsoring optometrist

The passing grade for the course is 75%. Module assignments are worth 40% and the CCOA Exam is worth 60%. If the registrant fails to achieve the minimum required grade, rewrites (maximum of 2) are allowed within a limited time period (fees apply). Failure to pass the rewrite by July 15th, 2017 will result in a 'completed but not certified' standing with the CCOA Program. No certificate will be issued. Registrants who obtain a final grade of 75% or higher, will receive one copy of the CCOA certificate by mail. A PDF version of the certificate is made available online.

The CCOA® designation and certificate is valid for 3 years

1.6.2 Special Accommodation for the Exam

If a learning disability prohibits you from taking the exam under standard conditions, you may request a special accommodation by sending the following to ccoa@opto.ca.

- a letter formally requesting and specifying the accommodation needed
- a letter from a professional (e.g., physician, psychologist, rehabilitation counsellor) who is familiar with the disability that provides a formal diagnosis and outlines the required accommodation

CCOA Renewal

To renew and maintain certification, the CCOA must earn at least 18 hours of qualifying continuing education credits which must include a maximum of 4 hours of **CPR** training, and pay a renewal fee every three years by the December 31st deadline. The CCOA certificate is renewed upon each recertification. Full details are on the website www.opto.ca/ccoa.

Failure to renew certification forfeits the legal right for an assistant to use the designation “CCOA”, and the certificate is no longer recognized. For most current Information about maintaining certification, visit www.opto.ca/ccoa

How to work with the website and CCOA dashboard?

A Website User Manual is available on the left hand side menu bar. Please be sure to read it thoroughly in order to understand the system functionalities.

Tax Credits

The Canadian Association of Optometrists is recognized by Employment and Social Development Canada (ESDC), and Canada Revenue Agency (CRA) as a certified private educational institution. Students taking in the Canadian Certified Optometric Assistant Program (CCOA) program who paid for the tuition themselves will receive an official tuition fee receipt: (T2202A) allowing you to qualify for Tuition and Education Tax Credits on your personal income tax, for the tuition paid for the programs. For more details about Tuition and Education tax credits, please visit the CRA website.

1.7 Cancellation & Refund Policy

Requests for cancellation must be received in writing by ccoa@opto.ca within 7 days of registration, subject to a cancellation fee of **\$200 per registrant**.

No refund or credit will be issued for:

- partial completion of the CCOA Program
- failure to graduate the CCOA Program
- course materials
- workshop registration
- incidentals

1.8 Contact Us

Canadian Association of Optometrists, 234 Argyle Ave., Ottawa, ON K2P 1B9

Email: ccoa@opto.ca | Voicemail: 613.235.7924 x 211