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Canadian Certified Optometric  
Assistant (CCOA) Program

Program Guide 2019-2020

This guide provides policies, guidelines and key information to answer common questions the optometric assistant (OA) or the sponsoring Optometrist may have about the CCOA Program (Full-Course and Individual Modules).

**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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## 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 helping optometric assistants become highly trained and specialized personnel.

**The CCOA Program** is administered in Canada to OAs on the CAO 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, 10th Edition*, Stein, Stein & Freeman
3. CCOA Program Study Guides for each course module (download from website)
4. Module Assignments (complete on website)
5. Time Limited Quiz (complete on website) **\*NEW**
6. Practical Skills Checklists (download from website)
7. A pre-fitted RGP contact lens to practice insertion and removal techniques (for Workshop & Module 8)
8. 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 16<sup>th</sup>, 2019. 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, time limited quiz 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 65% 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 the 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](http://www.lb.ca/cao). Both textbooks are available in e-book and hardcopy versions.

**Full Course Schedule:** Assignment, Quiz & Practical Skills Due Dates

	<b>Content Delivery Date</b> (available as of)	<b>Submission Deadline</b>
Module 1	Sept 16	Oct 14
Module 2	Oct 14	Nov 11
Module 3	Nov 11	Dec 9
Module 4	Dec 9	Jan 6
Module 5	Jan 6	Feb 3
Module 6	Feb 3	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 October	Registration Deadline: Nov 1
Attend 2-day Workshop		Jan - March (attend 1 event)
Exam Registration deadline	May	June 5
CCOA Examination		Written Between June 8-19
CCOA Exam Rewrite (fee applies)		Written Between June 8-June 26

*\*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, Quiz & Practical Skills Due Dates

<b>Module</b>	<b>Deadline</b>
Module 1 Assignment and Quiz	4 weeks from registration
Module 2 Assignment and Quiz	4 weeks from registration
Module 3 Assignment and Quiz	4 weeks from registration
Module 4 Assignment and Quiz	4 weeks from registration
Module 5 Assignment and Quiz	4 weeks from registration
Module 6 Assignment and Quiz	4 weeks from registration
Module 7 Assignment and Quiz	4 weeks from registration
Module 8 Assignment and Quiz	4 weeks from registration
Module 9 Assignment and Quiz	4 weeks from registration
Register for Workshop (fee applies)	October
Attend 2-day Workshop	Jan - March (attend 1 event)
Register Exam Date (fee applies)	May-June 5
CCOA Examination	Written Between June 8-19
CCOA Exam Rewrite (fee applies)	Written Between June 8-June 26

**Full Course Registrant Important note:** Final exams and rewrites are only conducted between June 8<sup>th</sup> and June 26<sup>th</sup>. Those who are unable to obtain a passing overall grade of 65% will not obtain the CCOA credential. A maximum of 2 rewrites is permitted.

**Individual Module Registrant Important note:** Final exams and rewrites are only conducted between June 8<sup>th</sup> and June 26<sup>th</sup>. Those who are unable to obtain a passing overall grade of 65% will not obtain the CCOA credential. A maximum of 2 rewrites is 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 the opportunity to work under supervision in the areas of the clinic pertaining to the Module they are studying.

**The study plan, assignments and quizzes** are structured upon the learning objectives for each module. Assignment questions and quizzes 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 by the deadline date indicated on the students dashboard. Late assignments will not be accepted and will score a mark of zero. (See detailed information in the Module Assignment Standards section)

Each Quiz must be completed online and submitted via the CCOA dashboard by the deadline date indicated on the students dashboard. Late quizzes will not be accepted and will score a mark of zero. (See detailed information in the Module Assignment/quiz 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, 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 busyness 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 and must be submitted by the deadline date associated to the module at hand. 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 Practical Skills Checklist is the same as the corresponding module 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 and Time Limited Quiz Standards

An overall mark of 65% is required to pass the course. **Course grades** are weighted as follows:

- Module assignments 35%
- Time limited quizzes 20% **\*NEW**
- CCOA Examination 45%

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.

**\*NEW** The purpose of the **closed book** Quiz is to test your knowledge and to prepare you for the final exam as the final exam is a timed exam. The quiz questions are based upon the required reading for the module at hand. The quiz consists of 20 questions, students will have 35 minutes to complete the closed book quiz. The quiz must be submitted by the module deadline date.



The assignment for each module is available online within the module deadline date, at the same time as the Module Study Guide and Practical Skills Checklist (if applicable). You will not have the flexibility to preview the timed quiz, the 35 minute timer will begin when the student clicks "Start". Answer keys linked to each module will be released the day after each module deadline. To access the answer keys, simply click on the grades associated with the module at hand (grades are located on the dashboard).

The **assignment and quiz grades will be available immediately after submission via email** and on your dashboard. Your Sponsoring Optometrist will be CC'd on these email.

### Support from an Instructor

Should you need help with your assignments, please contact us: [ccoa@opto.ca](mailto: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/quizzes and Requests for Due Date Extension

Module assignments and quizzes must be complete by the indicated due date or the assignment and/or quiz is forfeited and scored as incomplete and graded with a 0. In the event that the 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](mailto:ccoa@opto.ca) **prior to** the 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. The official workshop locations and dates will be posted on our website in July.

January 4-5	Vancouver, BC
January 11-12	Calgary, AB
February 1-2	SK or MB (location will be determined based on location majority)
February 8-9	Toronto, ON
February 22-23	NS or NB (location will be determined based on location majority)

Note\* A workshop will be hosted in NS or NB in 2020 if we obtain more than 20 participants in the area

### 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 October). You are welcome to attend any workshop offered.

Contact [ccoa@opto.ca](mailto:ccoa@opto.ca) if you have not received Registration Instructions by **Oct 4th**

You will be provided with 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 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)

### 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 dinner 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**

Breakfast, lunch and refreshments are provided to registrants on both workshop days. 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](mailto: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](mailto: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 8 – 19. 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 4, 2020.

#### **The CCOA Examination:**

- is online (via your dashboard)
- **is closed book**
- contains 100 multiple choice questions
- has a 3 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 and quizzes
- attended a complete Workshop
- submitted all Practical Skills Checklists
- remained employed by the sponsoring optometrist

**The passing grade for the course is 65%.** Module assignments are worth 35%, time limited quizzes are worth 20% and the CCOA Exam is worth 45% of your final grade. 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 June 26th, 2020 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 65% or higher, will receive one copy of the CCOA certificate by mail. A PDF version of the certificate is made available online.

**NEW** Students who pass the course will receive a PASS grade. Final exam results and overall grade results will not be shared. Those who are unsuccessful in passing will receive a FAIL grade, however, they will be provided with their final exam results and overall grade.

#### **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](mailto: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](http://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 the most current Information about maintaining certification, visit [www.opto.ca/ccoa](http://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](mailto: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](mailto:ccoa@opto.ca) | Voicemail: 613.235.7924 x 211