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To: Board Members

Date: November 4, 2016

From: Jessica Sieferman
Executive Officer

Telephone: (916) 575-7184

Subject: Agenda Item 5 - Presentation by the Association of Regulatory Boards of Optometry (ARBO) on the Optometric Education (OE) Tracker System

Sierra Rice, Program Manager at ARBO, will present information to the members about the OE Tracker System.

Pursuant to California Code of Regulations § [1536](#), the Board currently recognizes ARBO's online OE Tracker system as proof of continuing education course attendance. However, optometrists are not required to use the tracking system.

Additional information about OE Tracker can be found on ARBO's website [here](#).

Association of Regulatory Boards of Optometry



Association of Regulatory Boards of Optometry, Inc.

ARBO Mission Statement

The mission of the Association of Regulatory Boards of Optometry is to represent and assist member licensing agencies in regulating the practice of optometry for the public welfare.

ARBO Programs

- ▶ **COPE** (Council on Optometric Practitioner Education):
Accredits optometric continuing education activities.
- ▶ ***OE TRACKER***: Captures and stores continuing education data for optometrists and Licensing Boards.
- ▶ **CELMO** (Council on Endorsed Licensure Mobility for Optometrists): License mobility vehicle to assist optometric Licensing Boards in addressing the issue of licensure by endorsement.

OE *TRACKER*

OE TRACKER

- ▶ Electronically capture, verify, and store optometrists' CE attendance data to benefit:
 - Licensing Boards
 - Optometrists
 - CE Administrators/Providers

OE TRACKER Statistics*

- ▶ Active optometrists – 50,534
- ▶ Optometrists with CE Data – 48,172
- ▶ Total records of attendance – 3,060,990

- ▶ ODs with California license – 6433
- ▶ CA licensees with CE Data – 5945
- ▶ CA licensees registered w/OET – 3648

**As of October 2016*

OE TRACKER

- ▶ *Value to Optometrists:*
 - 24/7 online access to review CE hours.
 - Reduce paperwork.
 - Review license renewal requirements by jurisdiction.
 - View CE hours earned in current renewal period in all states where licensed.

OE TRACKER

Value to Licensing Boards:

- Quickly and easily audit 100% of licensees.
- Reduce administrative efforts.
- Reduce paper and be green!
- Verify CE attendance for an optometrist applying for a license from another state.

OE TRACKER

California State Board of Optometry Audit Process

- The CA Board's current process involves auditing around 15 ODs each month and requesting copies of all CE certificates.
- Once all certificates are received, staff logs each certificate into a worksheet to track the total number of hours and how the hours fall under the CE requirements.

OE TRACKER

OE TRACKER's Value to the CA Board:

- Free audit services offered through membership to ARBO– 4 standard reports currently available 24/7 that allow you to audit 100% of your licensees in a matter of minutes.
- Possibility to create custom report based on unique CE requirements.

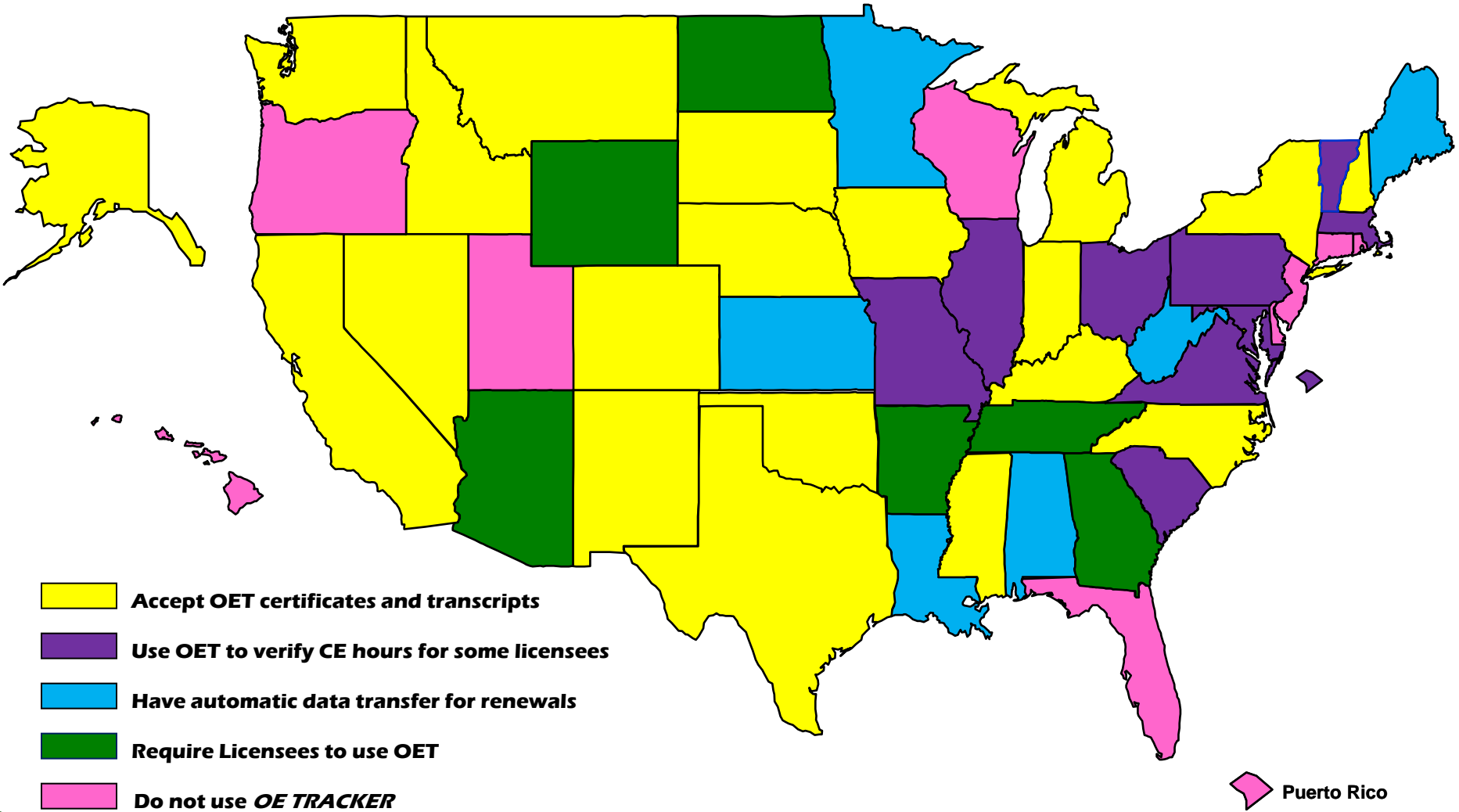
OE TRACKER

OE TRACKER's Value to the CA Board:

- Reduce administrative efforts and save paper—no longer need to request copies of CE certificates. All CE is in *OE TRACKER* and all reports are electronic.
- Connect your database to *OE TRACKER* via automatic data transfer for online renewals.

***OE TRACKER* U.S. Optometry Board Utilization**

Updated 2016



Member Board Utilization

- ▶ **Alabama Board of Optometry:** Optometrists renew their license online. CE data is automatically transferred from *OE TRACKER* and licensees with the required number of hours do not get audited.
- ▶ **Arkansas Board of Optometry:** Uses *OE TRACKER* for 100% electronic audit. Licensees are encouraged to use *OE TRACKER* and CE providers are instructed to send their attendance data to *OE TRACKER*.
- ▶ **Kansas Board of Optometry:** Optometrists renew their license online. CE data is automatically transferred from *OE TRACKER* and only licensees with the required number of hours can renew.
- ▶ **Tennessee Board of Optometry:** Contract with the state to provide web-based continuing education services. All licensees are required to use *OE TRACKER* and CE providers are required to submit attendance to *OE TRACKER*. ARBO does the audit for TN, sending notices to licensees and reports to the Board.
- ▶ **College of Optometrists of Ontario:** Requires licensees to have hours in *OE TRACKER* and will perform 100% electronic audit at the end of the next 3-year renewal cycle.

Member Board Testimonials

"Before *OE TRACKER*, it would take weeks to compile all of the hours submitted by our doctors for license renewal. Due to the extensive time commitment, we would randomly audit about 10% of our doctors. Now we are able to audit all doctors in less than an hour or two."

–Jim Bell, OD, Wyoming Board of Examiners in Optometry

"We began encouraging our licensees to utilize *OE TRACKER* about 3 years ago and have found it to be a highly successful tool for our Board and for our licensees...Nearly all of our licensees are taking advantage of *OE TRACKER* and I would highly recommend this useful reporting tool going forward!"

–Jeff Greene, Executive Director, Ohio State Board of Optometry

Member Board Testimonials

“With the use of *OE TRACKER*, not only are renewals a breeze for the optometrists that use it, but it also allows us to audit 100% of continuing education without difficulty.”

–Jan Murray, Executive Officer, Kansas Board of Examiners in Optometry

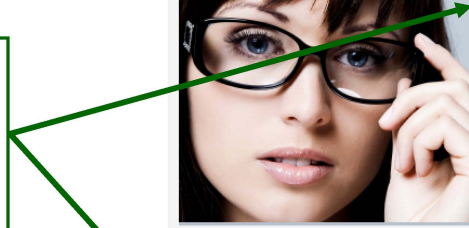
“*OE TRACKER* created a professional bridge for our state’s optometrists to quickly and efficiently document their validated continued competency...Last year, 92% of license renewals were completed electronically and we believe the great partnership with the team at *OE TRACKER*, the state CE providers, and our Board is a supporting reason behind that significant number. ”

–Randy Snyder, Executive Director, Minnesota Board of Optometry

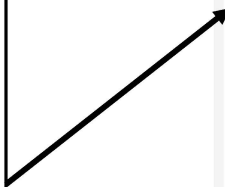
ARBO Website

The screenshot shows the ARBO website homepage. At the top right, there is a button labeled "Send Me an OE TRACKER Card". The main navigation bar includes "COPE", "OE TRACKER", "CELMO", "MEETINGS", "ABOUT ARBO", "MEMBER RESOURCES", and "INFO CENTER". The "OE TRACKER" menu is open, showing options: "Features", "Set Up Account", "Optometrist Options/Login", "Mobile App", "Fees", "OE TRACKER Number Lookup", and "Request an OE TRACKER Card". Below the navigation is a hero image of a woman with glasses. A "HOT LINKS" sidebar on the left lists: "OE TRACKER Login", "COPE Reviewer Login", "COPE Administrator Login", "ARBO Member Boards Login", and "NEW OE TRACKER MOBILE APP". The main content area contains a "Welcome" message, a "Mission Statement", an "OE TRACKER" section, and a "COPE" section.

Optometrists
log in to view
CE history



Member
Boards
log in to
audit
licensees



OE TRACKER

Member Board Login

- ▶ Each of ARBO's Member Boards has a unique username and password.

ARBO
Association of Regulatory Boards of Optometry, Inc.

COPE OE TRACKER CELMO MEETINGS ABOUT ARBO **MEMBER RESOURCES** INFO CENTER

Licensing Board Login
Directory of Member Boards
State CE Requirements

To represent and assist member licensing agencies in regulating the practice of optometry for the public welfare

HOT LINKS

- OE TRACKER Login
- COPE Reviewer Login
- COPE Administrator Login
- ARBO Member Boards Login
- NEW OE TRACKER MOBILE APP

Welcome to the NEW website of the Association of Regulatory Boards of Optometry (ARBO). ARBO's web site is designed to provide resources to regulatory boards of optometry throughout North America.

State/Provincial/Territorial Boards of Optometry serve as the licensing and regulatory arm of the optometric profession by formulating rules and regulations that govern and enforce the laws that grant the privilege to practice optometry, which are enacted by state legislatures.

Mission Statement

The mission of the Association of Regulatory Boards of Optometry is to represent and assist member licensing agencies in regulating the practice of optometry for the public welfare.

OE TRACKER

Optometrists can review their continuing education (CE) attendance data anytime from anywhere. They can view their course history and print a transcript or paper certificates.

COPE

The Council on Optometric Practitioner Education (COPE), a nationally recognized accreditation program for optometric continuing education (CE) courses, was developed to assist ARBO's member boards in the accreditation of optometric CE necessary for license renewal.

MEMBER BOARD LOGIN

ARBO's Member Optometry Licensing Boards login using your Board's username and password.

Username:

Password:

Remember Me on this computer

Login to MEMBER BOARDS

Member Board Options



 [Send Me an OE TRACKER Card](#)

- [COPE](#)
- [OE TRACKER](#)
- [CELMO](#)
- [MEETINGS](#)
- [ABOUT ARBO](#)
- [MEMBER RESOURCES](#)
- [INFO CENTER](#)

HOT LINKS

- [OE TRACKER Login](#)
- [COPE Reviewer Login](#)
- [COPE Administrator Login](#)
- [ARBO Member Boards Login](#)
- [OE TRACKER Mobile App](#)
- [SUMMER 2016 Greensheet](#)
- [OE TRACKER APP Comments](#)
- [2016 COPE Workshop](#)

ARBO Member Boards Home Page

Welcome California Board of Optometry

These programs have been developed by ARBO to assist our Member Boards of Optometry with the license renewal process.

- [View the ARBO Member Board OE TRACKER Handbook](#)
- [Look up CE Attendance Data for Licensees in OE TRACKER](#)
- [Look up OE TRACKER Numbers](#)
- [Validate a CE Certificate](#)

Automatically transfer CE data from OE TRACKER for your renewal using our XML program.



CE Attendance Reports

OE TRACKER Attendance Reports

California Board of Optometry

Get a summary report of licensees with the total number of CE credits in OE TRACKER

Get a detailed report of licensees CE attendance information in OE TRACKER

Get a report of licensees who have no CE credits in OE TRACKER

Search for detailed CE attendance information for one licensee

If you need a custom search or additional reports, please contact us at arbo@arbo.org

Download CE Data

Select date
range

ARBO MEMBER BOARDS CE Attendance Reports

California Board of Optometry

Get a summary report of licensees with the total number of CE credits in OE TRACKER

Course Date Range:

From:

To:

Sort Results By:

- OE TRACKER Number
- Last Name
- License Number

Member Board CE Summary Report

	A	B	C	D	E	F
1	OE NUMBER	FIRST NAME	INITIAL	LAST NAME	LICENSE NUMBER	TOTAL HOURS
2						
3	1234	John	J	Doe	316	0
4						
5	1235	John	P	Doe	399	24
6						
7	1236	John	A	Doe	334	0
8						
9	1237	John	J	Doe	371	0
10						
11	1238	John	J	Doe	359	14
12						
13	1239	John	C	Doe	391	0
14						
15	1240	John	M.	Doe	358	3

Member Board CE Detail Report

OE NUMBER	FIRST NAME	INITIAL	LAST NAME	LICENSE NUMBER	COURSE TITLE	COPE ID	CATEGORY	FORMAT	CEE	CEE HOURS	COURSE DATE	INSTRUCTOR	PROVIDER	HOURS	CITY	STATE	COUNTRY
9999	John	J	Doe	1234													
					The Ins Out of Cataract Co-Management Patient Educa	45551		Internet/Online			6/23/2015	Justin Schweitzer	Pacific University Colle	1	online		USA
					More Tales From the Grove	47518	General Optometry	Live			1/17/2016	Carole Timpone	Pacific University Colle	2	Lahaina	HI	USA
					Laser Therapy One Step Beyond	47297	Glaucoma	Live			1/19/2016	Nathan Lighthizer	Pacific University Colle	1	Lahaina	HI	USA
					Laser Procedures for the Management of Glaucoma an	45945	Laser Procedures	Live			1/18/2016	Nathan Lighthizer	Pacific University Colle	2	Lahaina	HI	USA
					Neuro Ocular Grand Rounds	39553	Neuro-Optometry	Live			10/23/2015	Anthony Litwak	Minnesota Association	2	Minneapc	MN	USA
					Neuroimaging 101 for the Optometrist	45489	Neuro-Optometry	Live			1/18/2016	Denise Goodwin	Pacific University Colle	1	Lahaina	HI	USA
					Optic Nerve Edema Itis Opathy	41220	Neuro-Optometry	Live			1/20/2016	Denise Goodwin	Pacific University Colle	2	Lahaina	HI	USA
					Optic Nerve Edema Itis Opathy	41220	Neuro-Optometry	Live			1/20/2016	Denise Goodwin	Pacific University Colle	2	Lahaina	HI	USA
					Oral Pharmaceuticals in Optometry Practice	41774	Oral Pharmaceutical	Live			10/23/2015	Marc Bloomenstein	Minnesota Association	2	Minneapc	MN	USA
					Cataract surgery with new laser technology	46260	Peri-Op Mngmt of Opl	Live			10/24/2015	Dan Davis	Minnesota Association	1	Minneapc	MN	USA
					Fundamentals of Gonioscopy	44623	Principles of Diagnosi	Live			1/19/2016	Denise Goodwin	Pacific University Colle	1	Lahaina	HI	USA
					Presbyopia Surgery--The Final Frontier	43615	Refractive Surgery Ma	Live			1/18/2016	Stanley Teplick	Pacific University Colle	1	Lahaina	HI	USA
					Screening Lasik Patients for Corneal Ectasia	44318	Refractive Surgery Ma	Live			1/19/2016	Stanley Teplick	Pacific University Colle	1	Lahaina	HI	USA
					Overview of Corneal Inlays for Presbyopia	46644	Refractive Surgery Ma	Live			1/20/2016	Stanley Teplick	Pacific University Colle	1	Lahaina	HI	USA
					Advanced Interpretation of the OCT	39140	Systemic/Ocular Disea	Live			10/23/2015	Anthony Litwak	Minnesota Association	2	Minneapc	MN	USA
					Ocular Manifestations of Systemic Disease Including D	38061	Systemic/Ocular Disea	Live			10/24/2015	Diana Shechtman	Minnesota Association	2	Minneapc	MN	USA
					Alzheimer Disease An Update with Answers to Comm	47193	Systemic/Ocular Disea	Live			1/20/2016	Leonid Skorin	Pacific University Colle	1	Lahaina	HI	USA
					Anterior Segment Case Challenges	41794	Trt/Mngmnt Anterior !	Live			10/23/2015	Marc Bloomenstein	Minnesota Association	2	Minneapc	MN	USA
					Presbyopia Update 2015	46256	Trt/Mngmnt Anterior !	Live			10/24/2015	Dan Davis	Minnesota Association	1	Minneapc	MN	USA
					Exposing MGD	46993	Trt/Mngmnt Anterior !	Live			1/18/2016	Samuel Kim	Pacific University Colle	1	Lahaina	HI	USA
					Meibography	46826	Trt/Mngmnt Anterior !	Live			1/19/2016	Samuel Kim	Pacific University Colle	1	Lahaina	HI	USA
					Review of Dry Eye Diagnostic Management Options	47045	Trt/Mngmnt Anterior !	Live			1/19/2016	Samuel Kim	Pacific University Colle	1	Lahaina	HI	USA
					HSV HZO EKC Viral Eye Disease Alphabet Soup	42359	Trt/Mngmnt Anterior !	Live			1/20/2016	Nathan Lighthizer	Pacific University Colle	2	Lahaina	HI	USA
					SECO 2014 Presents: Take It to the Limit: Increase Your	39635	Trt/Mngmnt Posterior	Live			10/24/2015	Diana Shechtman	Minnesota Association	2	Minneapc	MN	USA
													Total Hours	35			
9998	Jane	V	Doe	1235													
					Recognize Distinctions in Womens Eye Health	45321	General Optometry	Internet/Online			12/18/2015	Jill Autry	Review Of Optometry	2	online		USA
					From Ordinary to Extraordinary The Rapid Evolution in	46469	Peri-Op Mngmt of Opl	Internet/Online			12/18/2015	Paul Karpecki	Review Of Optometry	2	online		USA
					Ocular health A Matter of the Heart	46879	Systemic/Ocular Disea	Written			12/18/2015	Candice Tolud	Review Of Optometry	2	online		USA
					Going Antiviral How to Bring Herpes to a Halt	44093	Trt/Mngmnt Anterior !	Internet/Online			12/18/2015	Michael Lyons	Review Of Optometry	2	online		USA
					Updates in Ocular Surface WellNessPart 2 Dry Eye Pro	40944	Trt/Mngmnt Anterior !	Written			12/23/2015	Mile Brujic	Mededicus Llc	2	na		USA
													Total Hours	10			

OE TRACKER Certificates

ARBO

Association of Regulatory Boards of Optometry

This Continuing Education (CE)
Certificate of Completion

is awarded to

John M. Doe

*For the satisfactory completion of the
following course:*

True Ocular Emergencies

COPE ID: 20094-SD **Hours:** 2 hours

Category: Systemic/Ocular Disease

Date: 06/07/2008

Course Format:

Live

Digital Validation:

739708803

Provider:

**NORTH CAROLINA
OPTOMETRIC SOCIETY, INC.**

Media Sponsor:

Signature Agreement

By signing this document, I do hereby attest that I personally attended the listed course(s) and the information included is accurate to the best of my knowledge. I understand that the information attested to in this certificate may be shared with relevant optometry licensing boards or other state agency responsible for the licensure and regulation of optometrists.

.....
Signature

.....
Date

OE TRACKER

Data Submission to *OE TRACKER*

- Attendance data can be submitted in multiple ways:
 - CE Providers
 - electronically send attendance in pre-formatted Excel spreadsheet.
 - use their own barcode scanners and electronically send attendance in pre-formatted Excel spreadsheet.
 - utilize *OE TRACKER* mobile app.
 - Optometrists fax, e-mail or upload individual attendance certificates.

Data Submission to *OE TRACKER*

- ▶ Data from COPE and Non-COPE courses can be submitted to *OE TRACKER*.
- ▶ Once the attendance is uploaded into *OE TRACKER*, the OD is sent a verification email.
- ▶ Email contains a link to download a certificate (valid for 14 days.)

State Associations that submit attendance to *OE TRACKER* include:

Alabama Optometric Association*	Montana Optometric Association
Arkansas Optometric Association*	Nebraska Optometric Association*
Arizona Optometric Association*	New Jersey Society of Optometric Physicians
Colorado Optometric Association*	North Carolina State Optometric Society
Connecticut Association of Optometrists	North Dakota Optometric Association
Delaware Optometric Association	Ohio Optometric Association*
Florida Optometric Association	Oklahoma Association of Optometric Physicians*
Georgia Optometric Association*	Optometry Association of Louisiana*
Idaho Optometric Physicians*	Pennsylvania Optometric Association*
Indiana Optometric Association	South Carolina Optometric Physicians Association
Iowa Optometric Association*	Tennessee Association of Optometric Physicians*
Kansas Optometric Association*	Utah Optometric Association*
Maine Optometric Association*	Vermont Optometric Association
Maryland Optometric Association*	Virginia Optometric Association
Massachusetts Society of Optometrists	West Michigan Optometric Association*
Michigan Optometric Association*	West Virginia Association of Optometric Physicians*
Mississippi Optometric Association*	Wisconsin Optometric Association
Missouri Optometric Association*	Wyoming Optometric Association, Inc.*

*Utilize the *OE TRACKER* Mobile App

State Association Testimonials

“The Minnesota Optometric Association has been using the *OE TRACKER* system for about three years now, and we also have in the last year been encouraging use of the *OE TRACKER* app by attendees at our education events. We have found the system to be very good and makes our lives much easier as an association. We don't have to keep all of those paper forms and sort through them continuously for information, attendees get their emails about their classes after an event and can verify everything. It is a great system and the staff at ARBO have always been extremely helpful if there is a question or issue.”

–Beth Coleman, Executive Director, Minnesota Optometric Association

OE TRACKER

State Association Testimonials

“...Using the *OE TRACKER* app is so easy! It's easy for our members to download the app on their phone and scan the QR code for the class AND they get an immediate email with the education confirmation! From a staff perspective it's easy as well, all you do is print off the QR code, no downloading data from the scanners and formatting into a spread sheet -- we wish all of our members had smart phones so they could record and track their CE that way! :) Our Association feels that this is a great way for our members to record and track CE so we have elected to pay the *OE TRACKER* subscription fees for them as a member benefit. “

–Jill Gonder, Iowa Optometric Association Consultant

OE TRACKER

State Association Testimonials

“The *OE TRACKER* phone app has made our job of keeping up with attendance records a snap. Our attendees are amazed that they get an immediate e-mail letting them know that their attendance has been recorded, and it takes pressure off of the staff and volunteers to make sure attendance is recorded. We simply put the QR code as the last slide of the presentation for people to scan and their attendance is uploaded instantly. For the few that don't have a device where they can do this, we can have someone at the door with their phone to enter in attendance.”

–Vicki Farmer, Executive Director, Arkansas Optometric Association

OE TRACKER Fees

- ▶ No charge for Member Boards to utilize *OE TRACKER* services.
- ▶ No charge to CE Providers to submit attendance data electronically to *OE TRACKER*.
- ▶ No charge for CE Providers and optometrists to utilize the *OE TRACKER* mobile app to enter attendance.
- ▶ Optometrists pay \$25 for 1 year or \$60 for 3 years of *complete* access to *OE TRACKER*.
- ▶ ARBO also offers a group rate to State Boards or State Associations who want to pay for all of their licensees or members.
 - Reduced rate of \$15/optometrist/year.

More Information

- ▶ Presentation on our website shows how *OE TRACKER* can be used by optometrists:

<https://www.arbo.org/oetracker.html>

- ▶ More information on *OE TRACKER* mobile app also on our website:

https://www.arbo.org/smart_app.php

Questions?

Thank You



Association of Regulatory Boards of Optometry, Inc.