

The mission of the California State Board of Optometry is to protect the health and safety of California consumers through licensing, registration, education, and regulation of the practice of Optometry and Opticianry.

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Gregory Pruden, Interim Executive Officer

MEMBERS OF THE COMMITTEE

Jeffrey Garcia, O.D., Chair
Madhu Chawla, O.D. (Appointed)
Jonathon M. Ross, O.D.

Friday, March 24, 2023

**PRACTICE AND EDUCATION COMMITTEE
TELECONFERENCE DRAFT MEETING MINUTES**

This public meeting was held via WebEx and attended remotely

Members Present	Staff Present
Jeffrey Garcia, O.D., Chair	Gregory Pruden, Executive Officer
Jonathon Ross, O.D.	Randy Love, Assistant Executive Officer
	Joely Walker, Enforcement Manager
	Erica Bautista, Administrative Coordinator
Members Absent	Guests
Madhu Chawla, O.D.	On File

Link for the audio of discussions: <https://youtu.be/1PXF3jxsuwc>

1. Call to Order/Roll Call/Establishment of a Quorum

Note: The committee may not discuss or take action on any matter raised during this public comment section, except to decide whether to place the matter on the agenda of a future meeting. (Government Code § 11125, § 11125.7(a).)

Audio of Discussion: [0:06](#)

Committee Chair, Dr. Jeffrey Garcia called the meeting to order at 1:00 p.m. Dr. Garcia took roll call and a quorum was established. Dr. Madhu Chawla was absent.

2. Public Comment for Items Not on the Agenda

Audio of Discussion: [0:34](#)

There were no requests for public comment.

3. Discussion and Possible Approval of the January 27, 2023 Practice and Education Committee Draft Meeting Minutes

Audio of Discussion: [1:28](#)

There were no requests for public comment.

Jonathon Ross moved to approve the January 27, 2023 Committee draft meeting minutes. Jeffrey Garcia seconded. The Committee voted unanimously (2-0) and the motion passed.

Member	Aye	No	Abstain	Absent	Recusal
Dr. Garcia	X				
Dr. Ross	X				
Dr. Chawla				X	

4. Discussion and Possible Action on Continuing Education Course Approval Requests Pursuant to Title 16, California Code of Regulations Section 1535 (COMPLETE APPLICATIONS)

Audio of Discussion: [2:45](#)

a. Coastal Vision Medical Group – Manny Monroy

- i. New Era of Cataract Surgery: Post-Operative Co-Management: Why? What? How?
- ii. Extreme Refractive Cases

There were no requests for public comment.

Jonathon Ross moved to approve agenda items 4.a.i and 4.a.ii. Jeffrey Garcia seconded. The Committee voted unanimously (2-0) and the motion passed.

Member	Aye	No	Abstain	Absent	Recusal
Dr. Garcia	X				
Dr. Ross	X				
Dr. Chawla				X	

b. Coastal Vision Medical Group – Manny Monroy

- i. The Double Eyelid, the Most Important Line on the Face
- ii. Simplify the Patient’s Choice with Advanced Custom LASIK
- iii. The Case for the Implantable Collamer Lens
- iv. Never a Dull Moment with Dr. Agarwal
- v. Surgical Options to Improve Compliance for Our Glaucoma Patients
- vi. Fact or Fiction: Advancements in Glaucoma Evaluation and Treatment
- vii. From Cataract Surgery to Custom Lens Replacement
- viii. IOL Post-Op Case Management
- ix. Dry AMD Masqueraders

There were no requests for public comment.

Jonathon Ross moved to approve all continuing education under agenda item 4.b. Jeffrey Garcia seconded. The Committee voted unanimously (2-0) and the motion passed.

Member	Aye	No	Abstain	Absent	Recusal
Dr. Garcia	X				
Dr. Ross	X				
Dr. Chawla				X	

c. Coastal Vision Medical Group – Manny Monroy

- i. Is Refractive Lens Surgery the Same as Cataract Surgery?
- ii. A New Era in Refractive Surgery
- iii. Intense Pulsed Light (IPL) Treatment in the Optometric Practice
- iv. If the Intraocular Lens Is Not in Place
- v. Secrets to the Happy Cataract Surgery Patient
- vi. The Value of Two Cents: Forever
- vii. Update to Glaucoma Management

There were no requests for public comment.

Jonathon Ross moved to approve all continuing education under agenda item 4.c. Jeffrey Garcia seconded. The Committee voted unanimously (2-0) and the motion passed.

Member	Aye	No	Abstain	Absent	Recusal
Dr. Garcia	X				
Dr. Ross	X				
Dr. Chawla				X	

d. Pacific Vision Institute – Dr. Ella Faktorovich, MD

- i. New Insights into Sports Vision: Data-Driven Interventions to Elevate Performance of Athletes and Non-Athletes
- ii. Practical Pearls for Implementing Myopia Management into Primary Eye Care Practice
- iii. Advances and Controversies in Non-Surgical Treatment of Presbyopia
- iv. Refractive Surgery: What's Hot, What's Not, What's Coming Up
- v. EVO ICL Co-Management: A Practical Approach
- vi. Five Compelling Lessons from the Greatest Team of Cataract Surgeons
- vii. Oculoplastic Surgery: 10 Frequently Asked Questions
- viii. Rumors About Tumors: Cancers of the Eye, Nevi vs. Melanoma
- ix. Integrative Health: Transformational Paradigm Shift in Disease Prevention and Management
- x. New Perspectives on Eye Pain

- xi. Practical Applications of Posterior Segment OCT Retina Cases - Reading Between the Lines
- xii. Practical Application of Posterior Segment OCT - Neurodegenerative Cases

Dr. Ross commented that item d.viii would be more appropriately categorized as ocular disease and not general optometry. He recommended reclassifying item d.xi. from general optometry to ocular disease. Lastly, he recommended that item d.xii also be reclassified from general optometry to ocular disease. Dr. Garcia agreed.

There were no requests for public comment.

Jonathon Ross moved to approve all continuing education under agenda item 4.d. with the reclassification of items d.viii, d.xi, and d.xii to ocular disease. Jeffrey Garcia seconded. The Committee voted unanimously (2-0) and the motion passed.

Member	Aye	No	Abstain	Absent	Recusal
Dr. Garcia	X				
Dr. Ross	X				
Dr. Chawla				X	

e. Helm Vision Group – Dr. Craig Helm, MD

- i. OCT Interpretation for Glaucoma Evaluation

There were no requests for public comment.

Jonathon Ross moved to approve agenda item 4.e.i. Jeffrey Garcia seconded. The Committee voted unanimously (2-0) and the motion passed.

Member	Aye	No	Abstain	Absent	Recusal
Dr. Garcia	X				
Dr. Ross	X				
Dr. Chawla				X	

f. Colvard-Kandavel Eye Center – Angela Hughes

- i. Asian Blepharoplasty
- ii. Saying Goodbye to Multifocal IOLs
- iii. Drug induced Glaucoma & Stand Alone Minimally Invasive Glaucoma Surgery
- iv. Realizing the Goal

Dr. Ross noted that the “Asian Blepharoplasty” lecture was submitted for 1 hour of continuing education (CE) credit under the miscellaneous category; however, with only 12 slides he recommended approving the lecture for 0.5 hour and with the category of general optometry. Lecture ii. “Saying Goodbye to Multifocal IOLs” was submitted for 1

hour of ocular disease credit. With only 13 slides, Dr. Ross proposed approving the course for 0.5 hour of general optometry credit. Lecture iii. “Drug Induced Glaucoma & Stand Alone Minimally Invasive Glaucoma Surgery” was submitted for 1 hour of glaucoma CE credit. He noted that again with only 19 educational slides he recommended approving for 0.5 hour of glaucoma CE credit. Lastly, lecture iv. “Realizing the Goal” was submitted for 1-hour miscellaneous CE credit. With only 14 educational slides Dr. Ross recommended approving the lecture for 0.5 hour of general optometry credit.

Dr. Ross stated that if Colvard-Kandavel Eye Center wishes to resubmit their courses with additional educational slides/material, the Committee would be happy to consider approving the lectures for their desired hour of credit. Dr. Garcia requested that staff reach out to the provider and explain what the issue was causing the reduction of CE credit time.

There were no requests for public comment.

Jonathon Ross moved to approve the courses under 4.f. with the corrections as noted. Jeffrey Garcia seconded. The Committee voted unanimously (2-0) and the motion passed.

Member	Aye	No	Abstain	Absent	Recusal
Dr. Garcia	X				
Dr. Ross	X				
Dr. Chawla				X	

5. Discussion and Possible Action on Continuing Education Course Approval Requests Pursuant to Title 16, California Code of Regulations Section 1535 (ONLINE APPLICATIONS)

Audio of Discussion: [18:24](#)

- a. Maloney-Shamie Vision Institute - Ryan Delaney**
 - i. Optimizing Outcomes Through Collaborative Care

Dr. Ross noted that this is the first course submittal without a slide presentation; however, it did include a very thorough outline that certainly justifies the number of hours requested. Therefore he recommends approval.

There were no requests for public comment.

Jonathon Ross moved to approve agenda item 5.a.i. as submitted. Jeffrey Garcia seconded. The Committee voted unanimously (2-0) and the motion passed.

Member	Aye	No	Abstain	Absent	Recusal
Dr. Garcia	X				

Dr. Ross	X				
Dr. Chawla				X	

b. Dougherty Laser Vision - Carolina Guardado

- i. Therapy Options Based on Ocular Surface Disorders

There were no requests for public comment.

Jonathon Ross moved to approve agenda item 5.b.i. as submitted. Jeffrey Garcia seconded. The Committee voted unanimously (2-0) and the motion passed.

Member	Aye	No	Abstain	Absent	Recusal
Dr. Garcia	X				
Dr. Ross	X				
Dr. Chawla				X	

c. Marshall B. Ketchum University – Dr. John Lee, OD

- i. Glaucoma Lasers in Optometric Practice
- ii. Glaucoma or Not - The Diagnostic Dilemma of Normal Tension Glaucoma

There were no requests for public comment.

Jonathon Ross moved to approve all courses under agenda item 5.c. as submitted. Jeffrey Garcia seconded. The Committee voted unanimously (2-0) and the motion passed.

Member	Aye	No	Abstain	Absent	Recusal
Dr. Garcia	X				
Dr. Ross	X				
Dr. Chawla				X	

6. Discussion and Possible Action on Continuing Education Course Approval Requests Pursuant to Title 16, California Code of Regulations Section 1536 (KAISER APPLICATIONS)

Audio of Discussion: [22:23](#)

a. Kaiser Permanente – Dr. Jeong-Ah Kim, OD

- i. Cornea vs. Contact Lens
- ii. The Not So Sexy RGP Fitting Guide
- iii. Hot Eyes
- iv. Not So Typical Disturbed Eye
- v. Update on Diabetic Retinopathy
- vi. Swollen Nerves for Primary Care ODs
- vii. Aqueous Outflow and Glaucoma Treatment Options
- viii. Narrow Angles: So Simple Yet So Complicated

There were no requests for public comment.

Jonathon Ross moved to approve all courses under agenda item 6.a. as submitted. Jeffrey Garcia seconded. The Committee voted unanimously (2-0) and the motion passed.

Member	Aye	No	Abstain	Absent	Recusal
Dr. Garcia	X				
Dr. Ross	X				
Dr. Chawla				X	

b. Kaiser Permanente – Dr. Alisha Truong, OD

i. Eye Attack: Acute Retinal Ischemia

There were no requests for public comment.

Jonathon Ross moved to approve agenda item 6.b.i. as submitted. Jeffrey Garcia seconded. The Committee voted unanimously (2-0) and the motion passed.

Member	Aye	No	Abstain	Absent	Recusal
Dr. Garcia	X				
Dr. Ross	X				
Dr. Chawla				X	

7. Discussion and Possible Action on BreEZe Update to Interface with the Association of Regulatory Boards of Optometry’s (ARBO) OE Tracker

Audio of Discussion: [25:18](#)

Mr. Pruden provided an update on exploring the feasibility of connecting the existing BreEZe system with ARBO’s OE Tracker system. Staff has had a few conversations with the BreEZe team and discovered that in order to continue to explore linkages between the two systems staff needed to provide a process map. Staff needed to explain and provide materials to the BreEZe team of what the Board’s current processes are so they could design their functionality. Additionally, staff was notified by the Department’s Organizational Improvement Office that the Board was selected for a process improvement project, which will examine the way the Board does all its processes across licensing, enforcement, administration and including continuing education. It was discovered that the Board does not have a current processing map to inform the BreEZe team of the design work needed. However, the Board will come out of the Organizational Improvement Office (OIO) project in the coming months with exactly that; a process map for how the continuing education process occurs. At that point staff can go to the BreEZe team with that documentation and continue exploring how to link these two systems. The BreEZe team stated that the linkage project will take at least a year to complete. Staff has not been able to identify any cost yet because the Board has not yet entered into that work, so meanwhile staff will endeavor to continue

reforming the CE audit process. Staff goals are to complete at least 5% of the Board's licensee candidates each month and incrementally increase to at least 10% monthly. Mr. Pruden expects that there will be a lot of opportunity to find and realize efficiencies in the Board's CE audit program over the coming months. Staff will continue to explore how we may link the two systems (BreEZe and the OE tracker) together.

Dr. Ross noted that there is already a trend in the optometry profession to use the OE tracker system for organizing CE. Dr. Garcia concurred and stated that the House of Delegates announced to the 250 or so optometrists in the room that this is the direction the profession is heading.

8. Discussion and Possible Action on Continuing Education Requirements and Options for Including Diversity, Equity, Inclusion, and Belonging (DEIB) Course Requirements

Audio of Discussion: [33:47](#)

Mr. Pruden presented this discussion. He announced that this discussion is already placed on a future agenda for April in anticipation of having a legislation and regulatory committee. Mr. Pruden highlighted some options on how this may be accomplished. Regarding requiring licensees to take continuing education training in DEIB, there are a couple of pathways for this to happen. 1) the Board may pursue a regulatory package to make it a requirement. 2) the Board may pursue this on a statutory level. This path would require a bill to be introduced in the Legislature, then the legislative process to commence. Mr. Pruden advised that this can be brought to the full Board for a motion to direct staff to seek the legislative proposal if this were to be the option the Board chooses. It would be difficult for staff to pursue this avenue this year since bill introductions were completed in February; however, this is certainly an option staff could pursue in the future.

There were two recent efforts in the last few years' one was not successful. AB 2637 was a bill related to the Nursing Board which would have required some of this training for their licensees. That bill did not go forward. Two successful recent efforts at the Department were AB 465 pertaining to the Professional Fiduciaries Bureau and AB 948 pertaining to the Bureau of Real Estate Appraisers. Both of these bills were successful and instituted a cultural competency requirement as a condition of license renewal. AB 948 to effect at the beginning of this year.

Another option that would bypass the regulatory and statutory processes would be to encourage our licensees to seek out this training; of course this would not make DEIB training a mandate.

Dr. Ross stated that he is looking forward to hearing what the Legislation and Regulations Committee's recommendation is on moving forward. The next step would be to let them toss around some options, see what they say and go from there. Dr. Garcia agrees. Dr. Garcia noted that another alternative may be to discuss with the California Optometric Association (COA) the possibility of them offering this training.

This would make the process easy and increase access to the training. Dr. Ross agrees.

9. Discussion and Possible Action on Review Process for Continuing Education Course Approval Requests, Qualification Standards, and a Consistent Review Process

Audio of Discussion: [42:54](#)

a. Review of Course Approval Checklist

Mr. Pruden introduced this item and drew Members attention to documents provided in Members' materials. He asked if there are any specific comments about the checklist that Dr. Ross would like to highlight? Dr. Ross explained that the goal of this discussion is to improve the objectivity of how CE is reviewed at the Board, and for that objectivity to continue as a Board Member cycle on and off the Committee. Dr. Ross suggests the development of a manual for this Committee. Dr. Ross noted that a specific comment that he made previously is the need for a specific item that states there is a stand-alone financial disclosure slide appearing before the course material. During the last couple of reviews it was evident that material being presented was by somebody sponsored by a company and there was no financial disclosure. He recommends a box stating this as a mandatory item. Another comment Dr. Ross had was the idea that it is probably not necessary to include items on the checklist that are not mandatory. Dr. Garcia agreed.

Dr. Garcia noted that the Counsel on Optometric Practitioner Education (COPE) group is good about keeping their manual updated. He believes that in the future PEC manual, a link to COPE's manual should be included.

10. Future Agenda Items

Audio of Discussion: [51:55](#)

Dr. Ross requested that the development of the PEC manual be placed on a future agenda item. He feels this will be a reoccurring item as we work through the process. An action item regarding this would be compiling all the current documents that are required to be submitted to the Board and sending them to the Committee to review to get a feel for the task at hand. Dr. Garcia noted that submittal instructions for CE course approval are on the Board's website. He found them personally helpful. Dr. Garcia believes there is room for improvement, but the main focus will probably be having the Board's process and requirements align more with COPE's process and requirements. Dr. Ross requested that staff confirm whether the information on the website is the most current and up to date.

Dr. Ross requested for a future agenda item discussing the therapeutic pharmaceutical agents (TPA) certified requirements for optometrists in California. He would like the Committee to review the current language and consider an amendment to make the language less restrictive overall. His justification is that as the scope of practice has changed, sometimes presenters of CE courses which for the course to be included in

the ocular disease category, but the course may not fall directly into one of the specific categories listed in statute. Mr. Pruden responded stating that this is related to a motion approved during the last Board meeting regarding the COPE category course definitions and the Board's inability to determine how they all apply while looking at section 3059(e). The COPE category definitions are a future agenda item. Mr. Pruden also explained that the Board is currently pursuing a regulatory proposal for CE changes to CCR 1536 which is the code of regulations that implement Business and Professions Code (BPC) 3059(e). It may be possible to account for some of these changes in that regulatory process versus the statutory process.

Dr. Ross requested a discussion regarding the Board's California law exam. Many states do not require that applicants go to a testing center which involves time and money. What they do instead is create and provide a PowerPoint document that is the equivalent to a few hours' worth of material. The applicant studies the content and is then given a test to complete and submit to the board. Dr. Ross wishes to review our process and possibly consider not requiring applicants to travel to testing centers any longer. Dr. Ross noted that our Board's penalty on those who do not pass the law exam on the first attempt is fairly restrictive as they must wait six months to retake the exam.

There were no requests for public comment.

11. Adjournment

The meeting was adjourned at 2:06 p.m.