



# Opticianry Scope of Practice Study

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# Presentation Topics

- About OPES
- Implementing B&P Code §139
- Scope of Practice Study
- Purpose of Occupational Analysis (OA)
- Contact Lens Dispenser (CLD), Spectacle Lens Dispenser (SLD), and Optometric Assistant OAs
- Evaluation of the Optometric Assistant description of practice against the CLD and SLD descriptions of practice
- Conclusions and Recommendations

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# The Office of Professional Examination Services provides:

- Professional consulting services in examination validation and development to DCA's boards, bureaus, and committees
- Recommendations based on laws, professional guidelines, and technical standards related to licensure examinations



# Implementing Business and Professions Code §139

**DCA Policy OPES 22-01 *Licensure Examination Validation***

**DCA Policy OPES 20-01 *Participation in Examination Development Workshops***

**DCA DPM OPES 22-01 *Examination Security***

***Standards for Educational and Psychological Testing (2014)***

## Scope of Practice Study

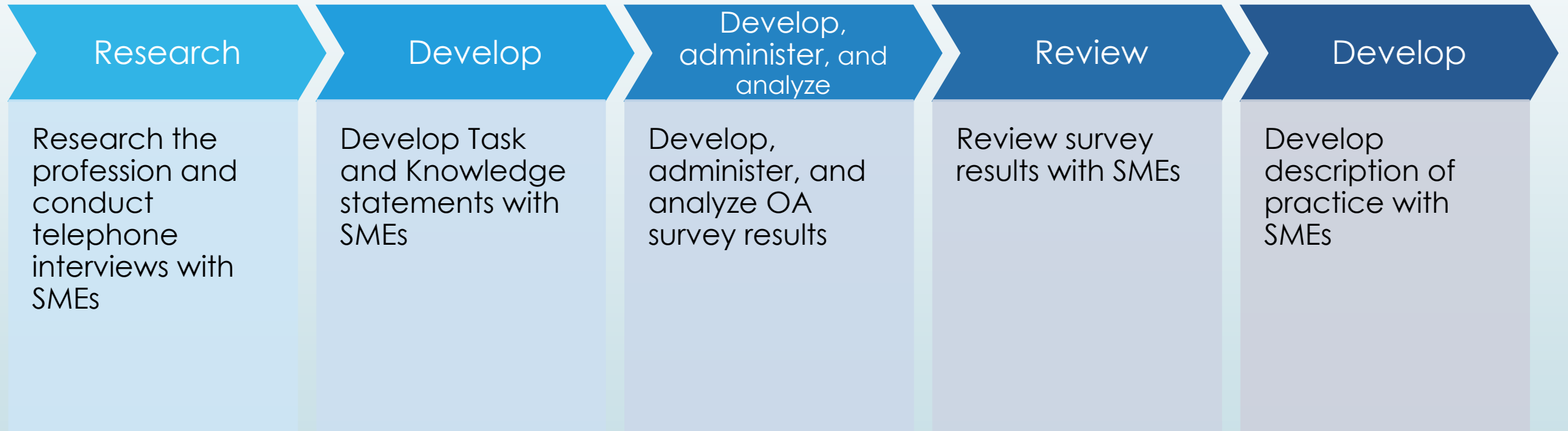
- Identify overlap in the scope of practice of three opticianry occupations: CLD, SLD, and Optometric Assistant
- Determine whether any health and safety concerns necessitate a change to the licensing classifications
- The first step of the review was separate occupational analyses (OAs) of the three occupations



# Purpose of Occupational Analysis

- ▶ Comprehensive, systematic study of the profession that provides a description of current practice
  - ▶ Identifies **entry-level** tasks
  - ▶ Identifies essential knowledge required for **safe and competent** performance of critical, entry-level tasks
- ▶ Provides the basis of job-related, fair, and legally defensible examinations
- ▶ Provides basis for legislation and policies

# Occupational Analysis Process



# 2019 CLD Occupational Analysis Results



Survey invitation to access web-based survey was mailed to **1,354** licensees



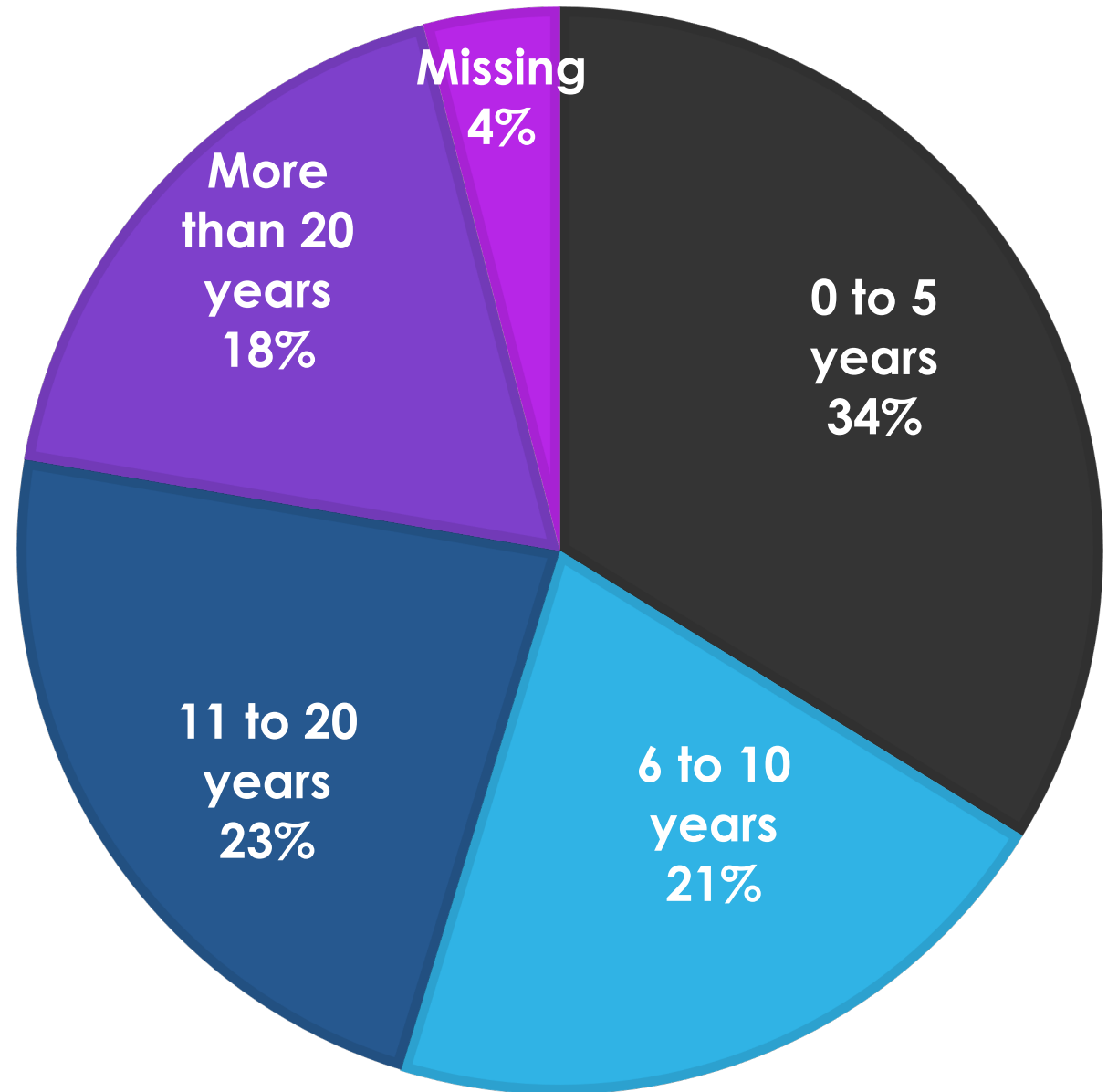
Overall response rate was **151** or **11%**



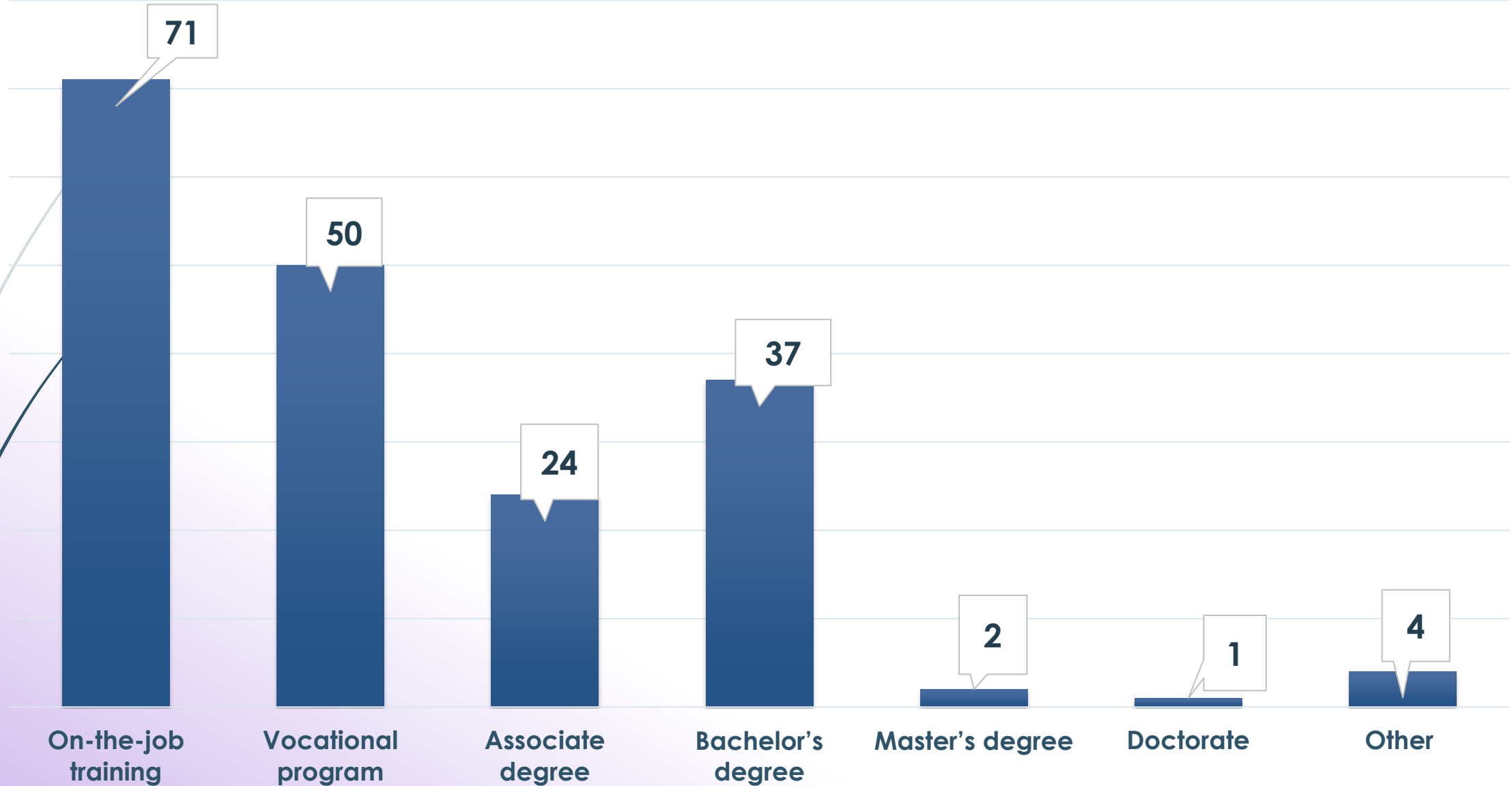
Final sample size for data analysis was **148** or **10.9%**



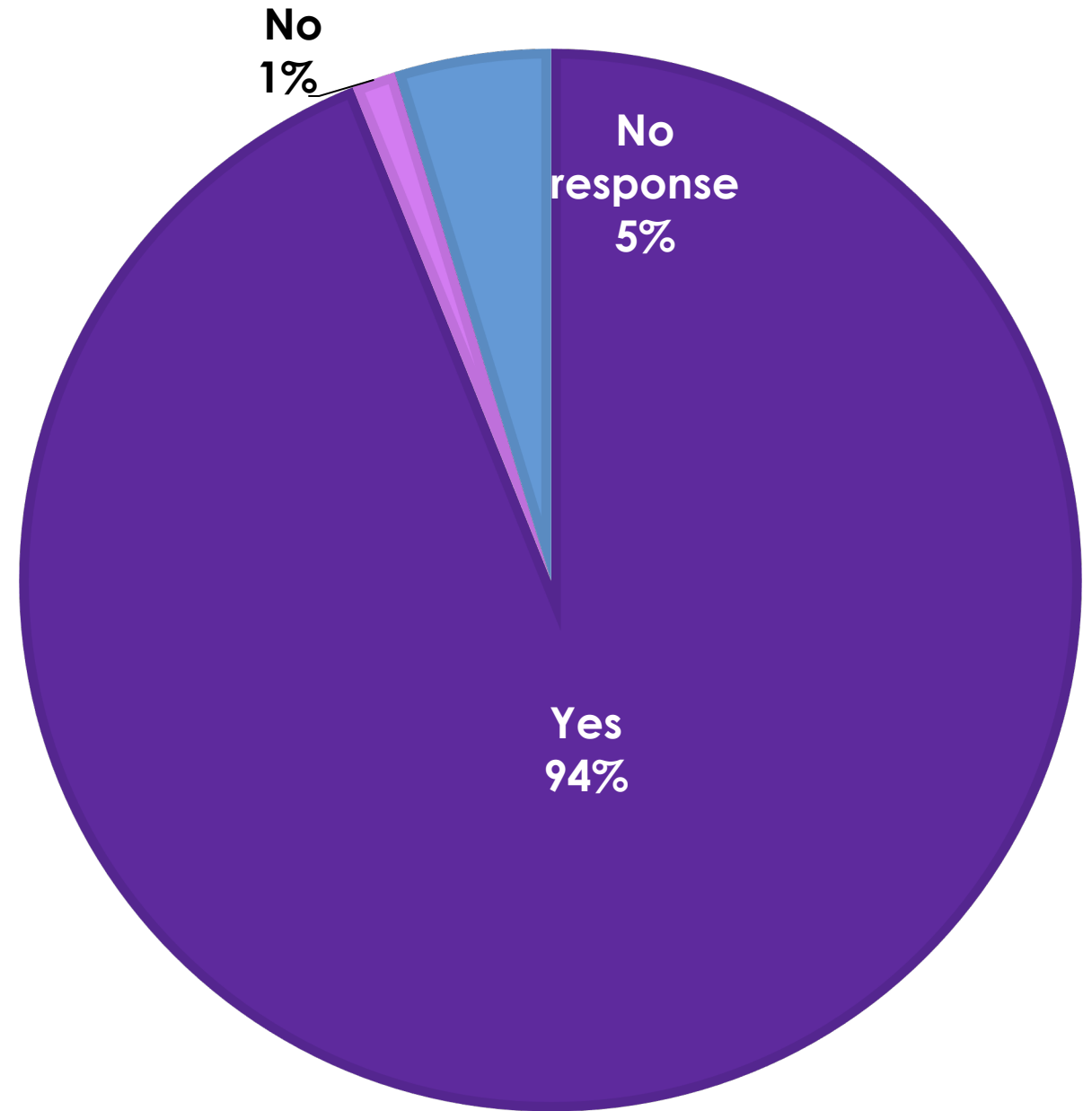
# Years Registered as a CLD



# Education and Training of CLDs



Also  
registered as  
an SLD



# 2020 SLD Occupational Analysis Results



Survey invitation to access web-based survey was mailed to **2,728** licensees

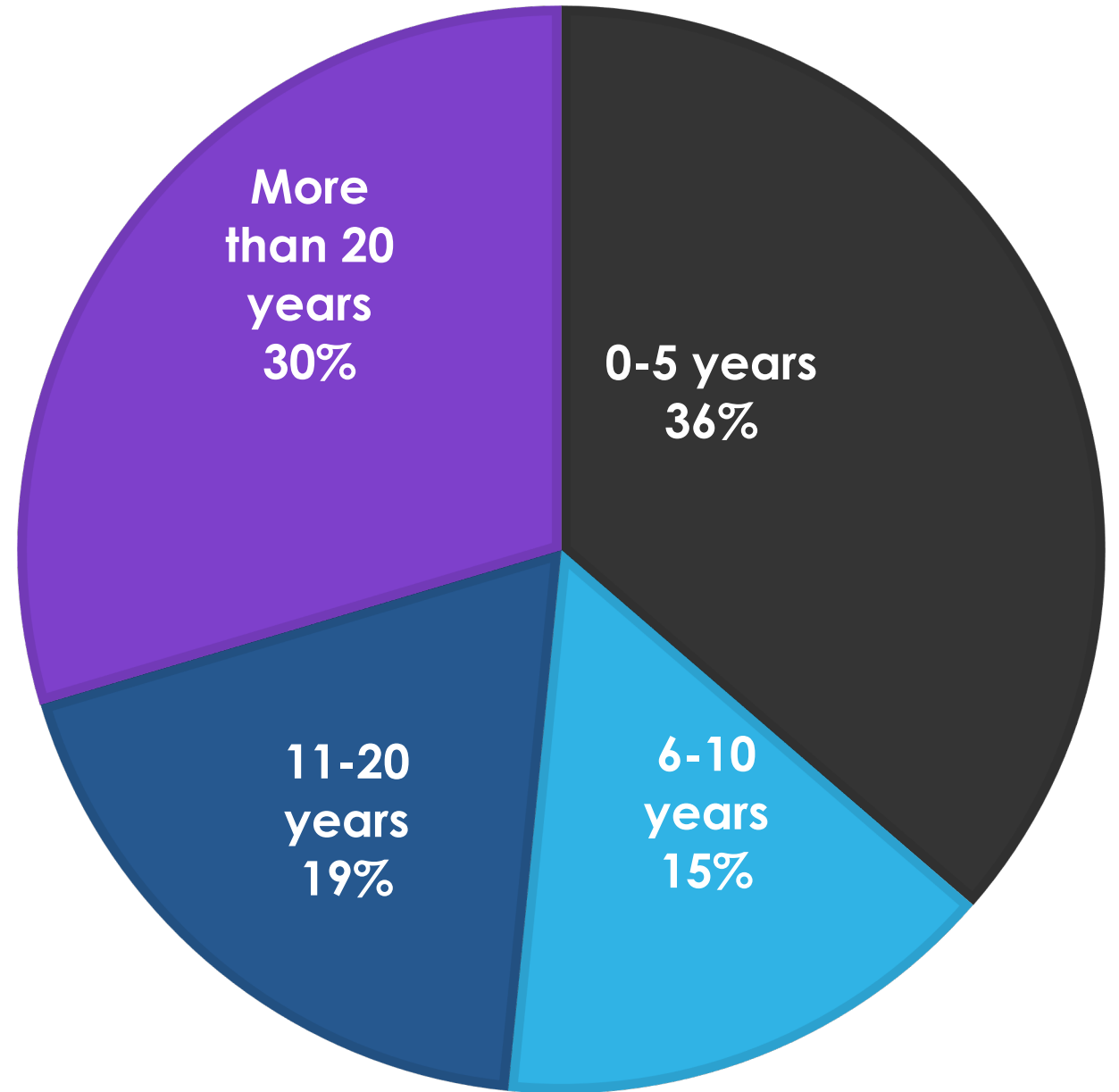


Overall response rate was **284** or **10.4%**

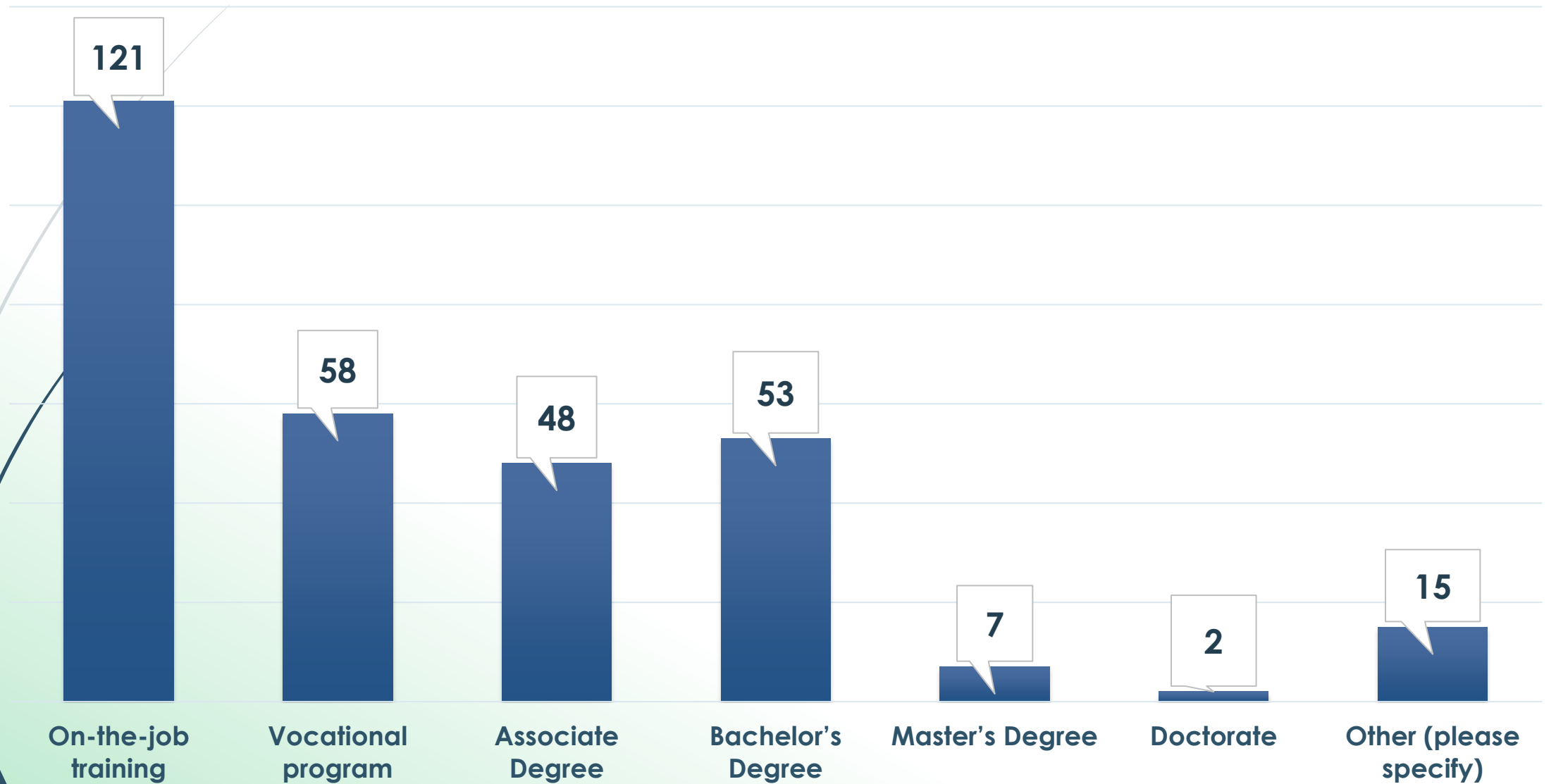


Final sample size for data analysis was **223** or **8.2%**

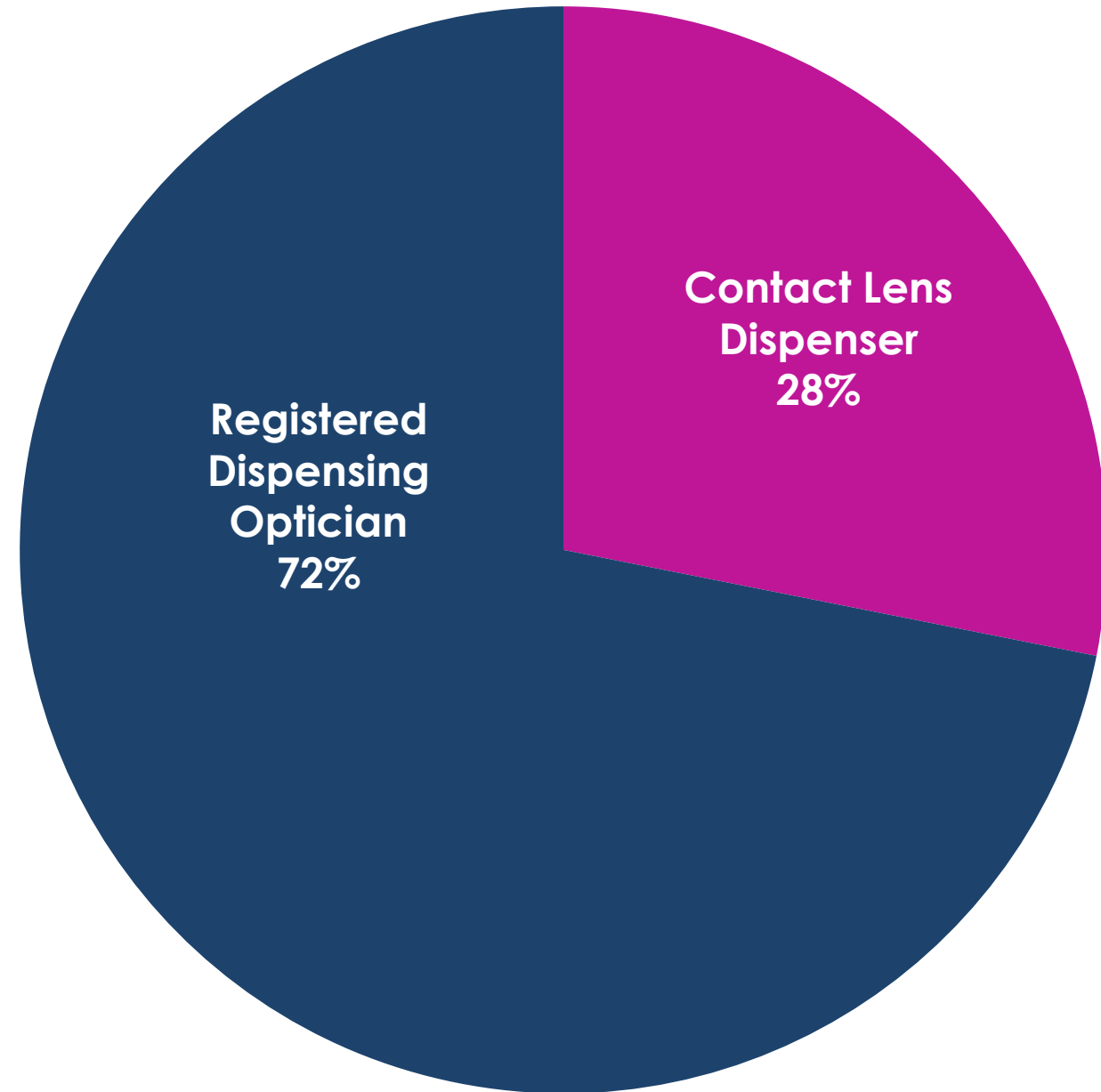
## Years registered as an SLD



# Education and Training of SLDs



# Other registrations held by SLDs



■ Contact Lens Dispenser (CLD)

■ Registered Dispensing Optician (RDO)

# Legal Description of the Optometric Assistant Occupation

► The optometric assistant occupation is unlicensed and unregistered. BPC § 2550(g) defines “unregistered” individuals who work with contact lenses and spectacle lenses as follows:

- (g) “Unregistered individual” means an individual who is not registered with the board pursuant to this chapter. The unregistered individual may perform any of the following:
  - (1) Fitting and adjusting of spectacle lenses under the direct responsibility and supervision of a duly registered spectacle lens dispenser pursuant to Section 2559.1.
  - (2) Fitting and adjusting of contact lenses under the direct responsibility and supervision of a duly registered contact lens dispenser pursuant to Section 2560.



# 2023 Optometric Assistant Occupational Analysis Results



Survey invitation to access web-based survey was mailed to **7,535 Optometrists**

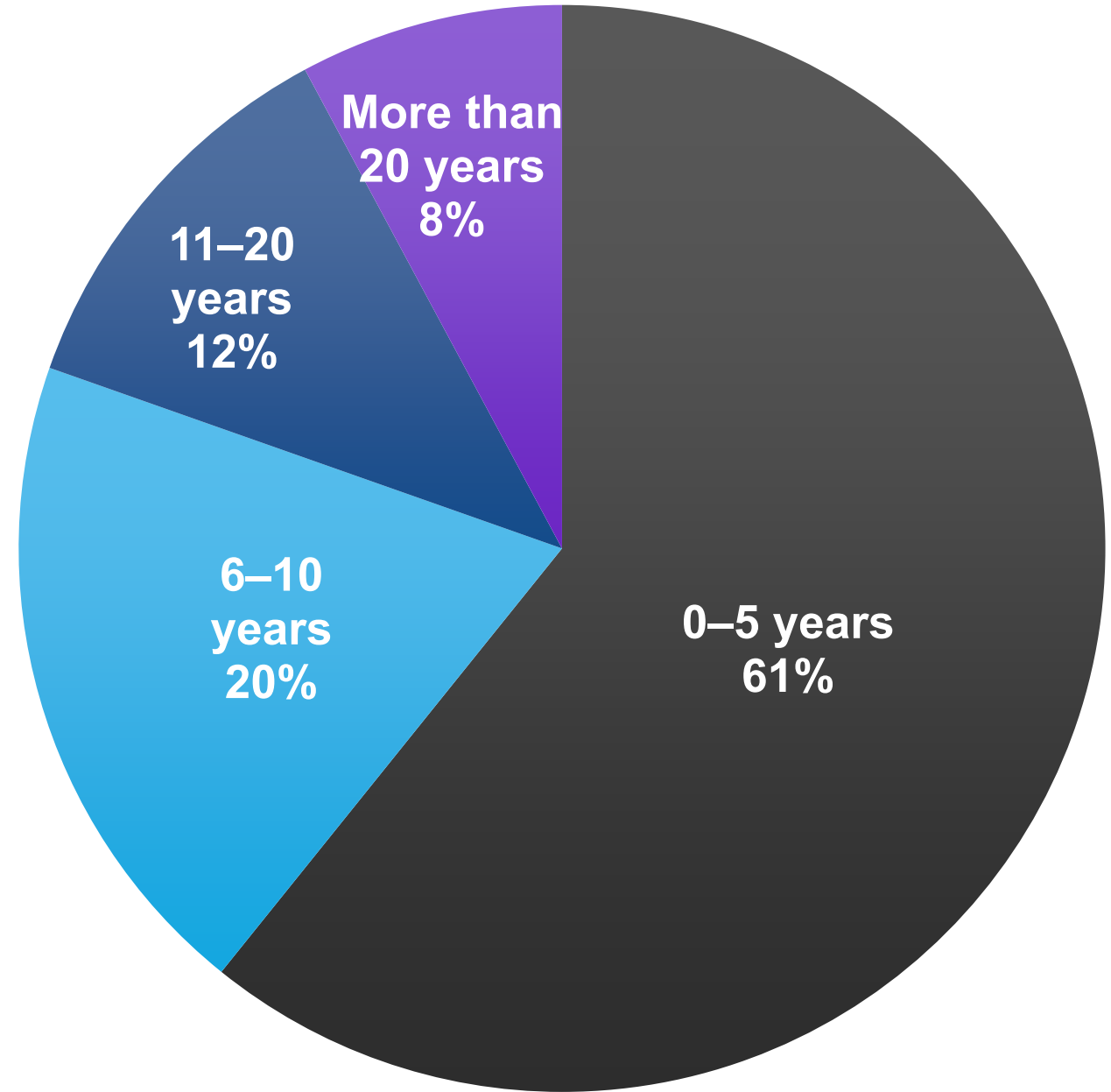


Overall response rate was **86** Optometric Assistants

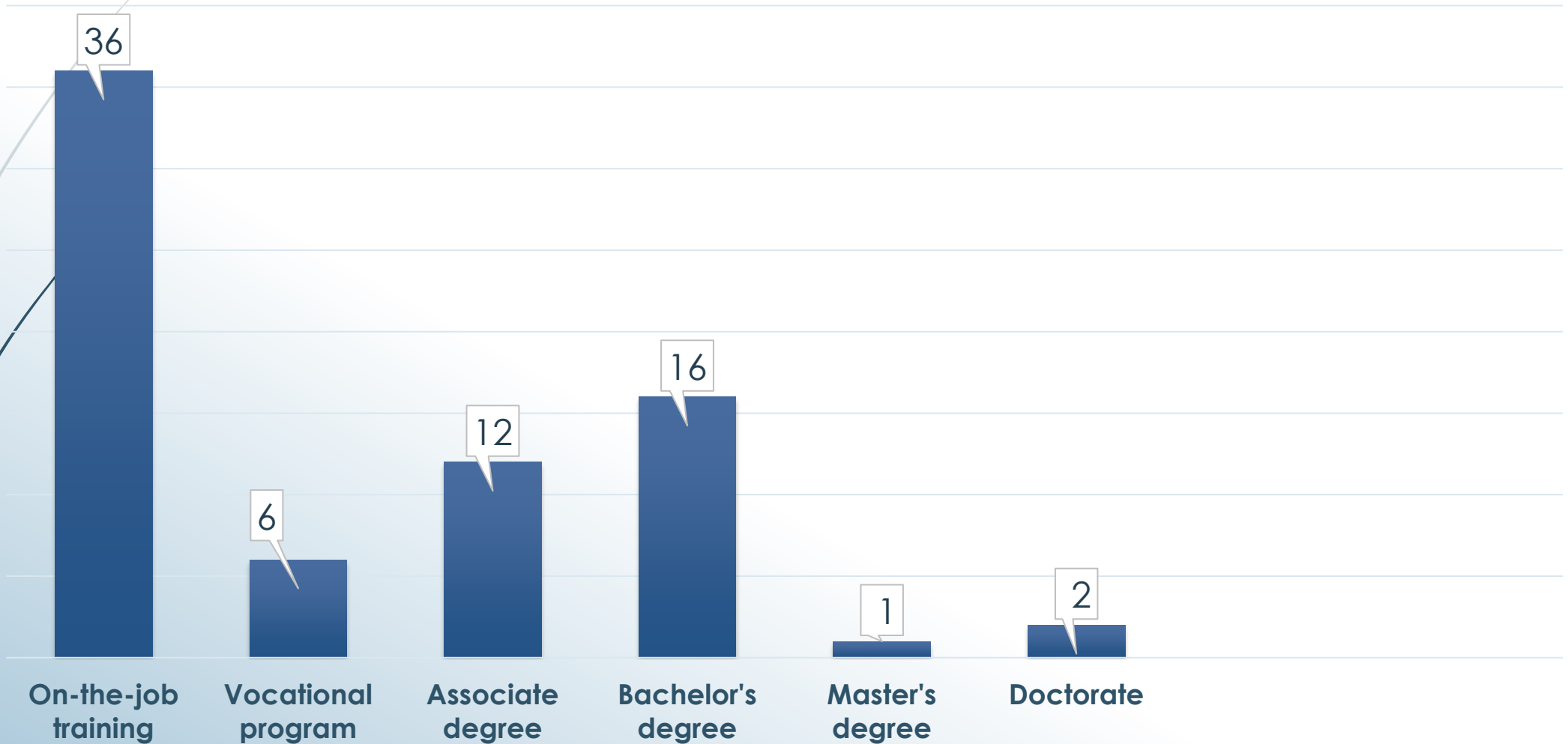


Final sample size for task and knowledge ratings was **33**

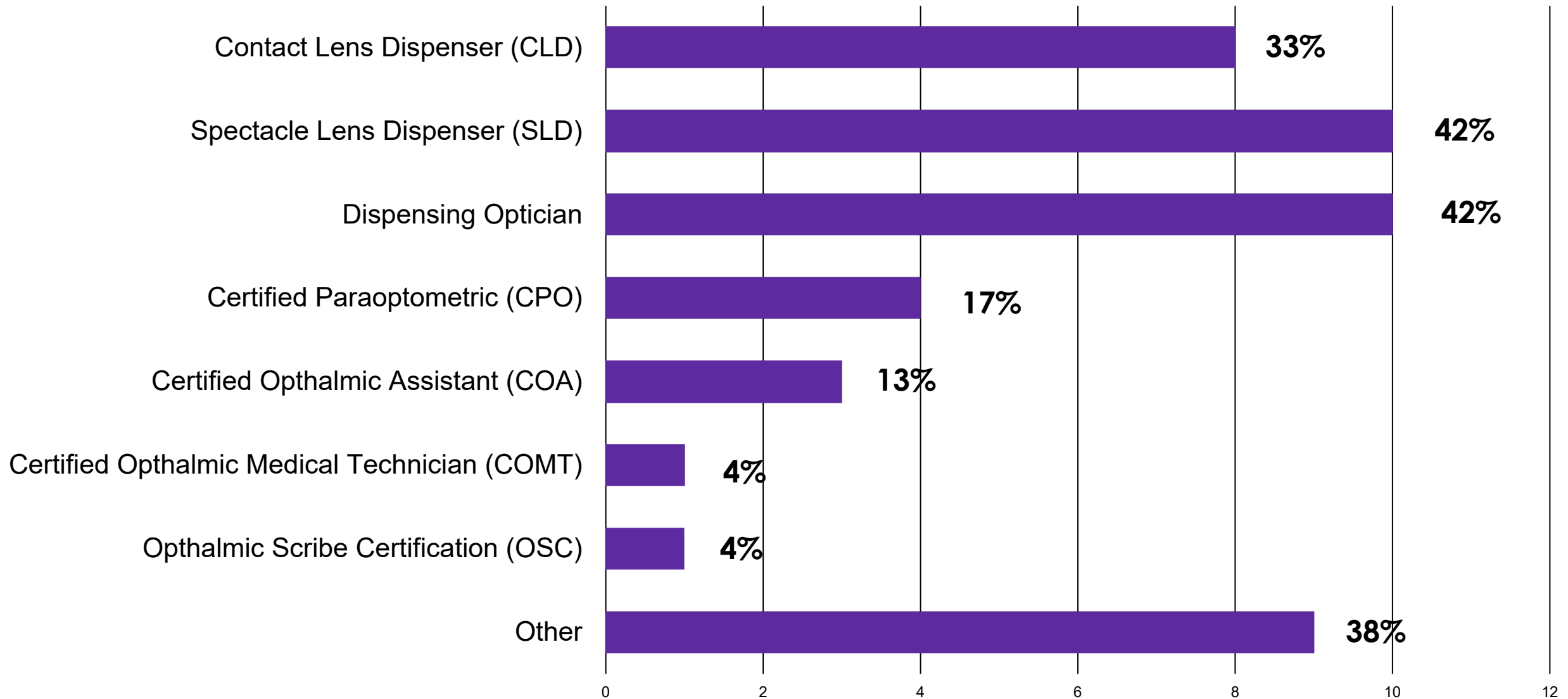
# Years Working as an Optometric Assistant



# Education and Training of Optometric Assistants



# Certifications/Registrations Held by Optometric Assistants



## Certifications/Registrations Held Summary

- ▶ The majority of CLDs who responded (94%) were also registered as SLDs
- ▶ Only 28% of SLDs who responded were also registered as CLDs
- ▶ 33% of Optometric Assistants who responded are registered as CLDs and 42% are registered as SLDs
- ▶ Important consideration for Optometric Assistant OA:
  - ▶ Low number of survey respondents

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## Task Ratings

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### **FREQUENCY**

**SCALE:** How often do you perform this task in your current work?

**0 – DOES NOT APPLY.** “I do not perform this task in my current work.”

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**5 – VERY OFTEN.** “This task is one of the tasks I perform most often in my current work relative to other tasks I perform.”

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### **IMPORTANCE**

**SCALE:** How important is this task for effective performance in your current work?

**0 – DOES NOT APPLY.** “This task is not required for effective performance in my current work.”

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**5 – CRITICALLY IMPORTANT.** “This task is extremely important for effective performance in my current work.”

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## Knowledge Ratings

**IMPORTANCE SCALE:** How important is this knowledge for effective performance of tasks in your current work?

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**0 – DOES NOT APPLY TO MY WORK / NOT REQUIRED.** “This knowledge is not required for effective performance of tasks in my current work.”

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**5 – CRITICALLY IMPORTANT.** “This knowledge is extremely important for effective performance of tasks in my current work.”

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## Description of Practice

- Decisions made based on evaluation of data and SME consensus
  - Identify critical tasks and knowledge
  - Confirm task-knowledge linkage
  - Determine final content areas





# Optometric Assistant Description of Practice Content Areas

## CONTENT AREAS

**1. Patient Assessment (40%) – 20 tasks**

**2. Spectacle Fitting (15%) – 24 tasks**

**3. Contact Lens Evaluation (15%) – 16 tasks**

**0301. Initial Evaluation – 10 tasks**

**0302. Follow-up Evaluation – 6 tasks**

**4. Office Management (30%) – 14 tasks**

**0401. Inventory – 5 tasks**

**0402. Record Keeping – 9 tasks**

# Scope of Practice Study

- ▶ In 2023, OPES test specialists facilitated a workshop with SMEs consisting of two optometrists, two SLDs, and four SLDs/CLDs.
- ▶ Discussion of the tasks on the Optometric Assistant description of practice
  - ▶ 25 tasks on the Optometric Assistant description of practice were identified as tasks that should only be performed by CLDs or SLDs
    - ▶ The SMEs believed that Optometric Assistants do not possess the necessary level of knowledge and training to safely perform them
  - ▶ Four additional tasks were identified as missing from the optometric assistant description of practice
    - ▶ The SMEs recommended adding these tasks to the description of practice.

# Scope of Practice Study

## Tasks recommended for removal from the Optometric Assistant description of practice:

### 1. Patient Assessment

- 13. Apply mydriatics to dilate patient pupils.
- 14. Perform cycloplegic refraction to determine patient prescription.

### 2. Spectacle Fitting

- 17. Determine spectacle frame design by evaluating patient prescription and needs.
- 18. Determine types of spectacle lens materials (for example, glass, CR-39, polycarbonate, trivex, high-index) by evaluating patient prescription and needs.
- 19. Determine spectacle lens type and design (for example, single vision, multifocal) by evaluating patient prescription and needs.
- 20. Determine secondary lens options (for example, occupational, low vision, sports vision, blue light protection) and sun protection by evaluating patient prescription and needs.

# Scope of Practice Study

## Tasks recommended for removal from the Optometric Assistant description of practice (continued)

### **2. Spectacle Fitting (continued)**

- 21. Convert spectacle lens prescriptions to intermediate or reading lenses.
- 23. Pre-adjust spectacle frame on patients to ensure optimal fit.
- 24. Fit and adjust frame on patient to ensure accurate measurement.
- 25. Measure horizontal pupillary distance to determine optical center.
- 28. Verify that spectacles received from laboratory match doctors' prescriptions.
- 29. Verify that spectacles received from laboratory match order specifications (frame lens materials).
- 30. Adjust spectacle frame on patient to ensure optimal fit.
- 31. Assess patient comfort and vision clarity with new spectacles.
- 32. Address patient concerns with spectacles.
- 33. Identify defects (for example, crazing, distortion) in spectacle lenses.

# Scope of Practice Study

## Tasks recommended for removal from the Optometric Assistant description of practice (continued)

- ▶ 35. Educate patients on the adaptation period for spectacle lenses
- ▶ 36. Educate patients on use of multifocal lenses.
- ▶ 38. Perform common eyewear repairs to extend life of spectacles.

### **3. Contact Lens Evaluation**

- ▶ 41. Convert spectacle lens prescription to contact lens prescription.
- ▶ 43. Handle different contact lens types based on manufacturer's recommendations.
- ▶ 51. Perform follow-up assessment to evaluate comfort and fit of contact lenses.
- ▶ 52. Test patient visual acuity after trial period to determine need for adjustments to prescription.
- ▶ 55. Verify contact lens fit and eye health using slit-lamp.

### **4. Office Management**

- ▶ 61. Identify defects (e.g., tears, warping) in contact lenses and notify manufacturer.

# Scope of Practice Study

- ▶ **Discussion regarding what changes to the Optometric Assistant, CLD and SLD professions, if any, would increase public safety. The SMEs recommended:**
  - ▶ Establish a clear definition of the role of Optometric Assistants
  - ▶ Detail the tasks Optometric Assistants can perform and the intent of the tasks
  - ▶ Require Optometric Assistants to register with the Board
  - ▶ No changes to the SLD and CLD professions were recommended by the SMEs

# Scope of Practice Study

## ► **Additional Suggestions**

- Develop an examination for optometric assistants to obtain certification/licensure
- Use an existing national paraoptometric examination to obtain certification/licensure
- Create an optometric assistant apprenticeship program as pathway to optometric assistant certification/licensure



# OPES Conclusions and Recommendations

- **Confusion about Optometric Assistant scope of work**
- **Health and Safety Concerns**
- **Create a task force to further evaluate the Optometric Assistant occupation**
  - Further evaluate health and safety concerns for tasks performed by Optometric Assistants
  - Decide if an additional license/registration needs to be added
  - Establish clear scope of work for Optometric Assistants





Questions?