# Optometric Technician Standards

Effective January 1, 2019

Adopted by the ACOE at its Annual Meeting June 21-23, 2018

*(Programs with site visits scheduled prior to January 1, 2019 may elect*

*to be evaluated by these standards)*

# Standard 1 – Mission, Goals, Objectives

* 1. The program must have a published mission statement that describes the overall purpose(s) of the program.
     1. The program must be centered on education and clinical training that results in the technician’s ability to enhance patient care.

Examples of Evidence

* *A copy of the mission statement*
* *Document(s), hard or electronic, in which the mission statement is published*
  1. The program must have a published set of goals that define the accomplishments necessary to achieve the mission.

Examples of Evidence

* *A copy of the goals*
* *Document(s), hard or electronic, in which the goals are published*
  1. The program must have assessable objectives for each goal that specify how that goal is to be met.

Example of Evidence

* *List of objectives derived from the mission statement and goals.*
  1. The program must annually review the fulfillment of its objectives to determine the degree to which it has attained its mission and goals. Such measures must include but not be limited to program completion rates, certification examination results and job placement.

Examples of Evidence

* *Program completion rates*
* *Certification examination results for last five years*
* *Graduate and alumni placement information*
* *Results of alumni/employer surveys*
* *Other outcomes assessments, as applicable*

1.4.1 Within the eight year period before each site visit, 70% of those who have completed the program must have been placed in a related job within one year of program completion, or the ACOE will initiate an appropriate review of the program.

***Example of Evidence***

* *Tabulation of post-graduate job placement rates in related fields.*
  1. The program must engage in an ongoing, systematic process of planning and self-study and must review on a regular basis its program mission, goals and objectives and revise them as necessary.

Examples of Evidence

* *Written review process*
* *Agendas or minutes of advisory committee meetings*
* *Evidence of involvement of stakeholders*

# Standard 2 – Curriculum

* 1. The program must be a minimum of one academic year in length or its equivalent.

***Example of Evidence***

* *Copy of curriculum sequence*
  1. The curriculum must fulfill the mission, goals and objectives to prepare students for employment in an ophthalmic setting.

***Examples of Evidence***

* *Copy of curriculum*
* *Course descriptions*
* *Course outlines/syllabi*
* *Description of process for students to evaluate courses.*
* *Instruments used by students to evaluate courses.*
* *Completed student evaluations of courses*
  1. The curriculum must include instruction in:
* General office procedures
* HIPAA regulations
* Ocular anatomy and physiology
* Ophthalmic optics and optical dispensing
* Clinical testing procedures
* Awareness and rationale for the use of contemporary equipment and procedures
* Contact lens procedures
* Common ocular conditions
* Common systemic conditions

Examples of Evidence

* *Copy of curriculum (see 2.2)*
* *Course descriptions (see 2.2)*

2.4 The curriculum must prepare students for employment as optometric technicians. At a minimum the graduate must be able to:

* + 1. Skillfully and accurately collect data to be used by the doctor of optometry for diagnostic purposes including:
  + Case history, visual acuity, color and depth perception testing
  + Lensometry
  + Interpupillary distance measurement, dominant eye and extraocular muscle testing
  + Cover test and pupil testing
  + Visual field testing
  + Keratometry
  + Pachymetry
  + Tonometry
  + Blood pressure testing
    1. Apply principles of professionalism as they pertain to optometric practice, including:
  + Maintain confidentiality
  + Communicate professionally
  + Maintain applicable ethical and legal standards
  + Perform competently within the scope of training and education
    1. Assist the doctor of optometry in the care of the patient, including:
  + Administer and record specified topical and oral medications at the direction of the doctor of optometry
  + Identify ocular emergencies and take appropriate action
  + Prepare the examination and treatment area
  + Identify medical terms of common ocular and systemic conditions/diseases.
  + Implement emergency procedures and administer first aid, including cardiopulmonary resuscitation
  + Implement infection control protocols
    1. Assist patients in the optical dispensary, including:
  + Explaining the features and benefits during the selection of frames and spectacle lenses
  + Obtain needed facial and lens measurements
  + Prepare and submit eyewear orders
  + Neutralize and verify lenses
  + Dispense, adjust and repair eyewear for the patient
    1. Assist the doctor of optometry in the fitting and evaluation of contact lenses, including:
  + Assist in the contact lens fitting examination
  + Insert patient contact lenses
  + Order and verify contact lenses
  + Instruct patients in contact lens hygiene, insertion, removal and care
  + Maintain contact lens inventory
    1. Perform general office procedures, including:
  + Use proper telephone etiquette
  + Schedule appointments
  + Accurately triage emergency patients
  + Maintain patient records including electronic health records
  + Perform financial transactions
  + Understand the third party reimbursement process
  + Maintain office and clinic inventory of patient care supplies
  + Manage recall system

Examples of Evidence

* *Program outcomes statements; specific course objectives; and/or clinical evaluations*

2.5 The program must establish a set of competencies and evaluate the student’s attainment of these competencies to assess the degree to which each student has mastered the course objectives.

Examples of Evidence

* *Course and clinical learning objectives*
* *Evaluation of clinical performance*

2.5.1 Criteria and procedures for measuring student progress must be predetermined and communicated to students at the beginning of each course.

2.5.2 Faculty evaluation of student performance must be conducted throughout the program. Provisions must be made for remedial measures, probation, dismissal, or other appropriate action for students who do not meet academic and/or clinical evaluation criteria.

2.5.3 A mechanism must be in place to provide the student with feedback on performance throughout the duration of the program.

Examples of Evidence

* *Course outlines/syllabi (see 2.2)*
* *Documents used to evaluate students’ performance*
* *Descriptions of remedial measures, probation and dismissal policies*
* *Description of student appeal procedure*
* *Samples of student evaluation instruments such as quizzes, exams, laboratory work, term papers, and special projects*
* *Selected samples of student work*
* *Lab manuals and other reference materials used*

2.6 Clinical experience, designed to provide the student with competence in optometric technician skills, must be an integral part of the program.

2.6.1 Clinical experiences must be planned, supervised and evaluated by program faculty in cooperation with supervising clinical personnel.

2.6.2 Monitoring/supervision of the clinical experience must be demonstrated and reflect the program’s mission, goals and objectives.

Examples of Evidence

* *Description of clinical experience*
* *List of clinical affiliates*
* *Description of the monitoring/supervision of the clinical experience*
* *Copy of affiliation agreement if applicable*
* *Student evaluation of clinical experience including affiliates*

2.7 There must be an ongoing curriculum review process.

Examples of Evidence

* *Description of curriculum review mechanism*
* *Minutes of faculty curriculum review meetings*

**Standard 3 - Administration**

* 1. The program must be a part of an institution that is accredited by a United States Department of Education recognized regional or national institutional accrediting body.

Example of Evidence

* *Evidence of institutional accreditation*
  1. There must be a program director, as qualified below, to administer the program.

3.2.1 The program director must have at least one year of experience as a doctor of optometry, a certified para-optometric technician, or another para-professional within the optometric/ophthalmic field.

3.2.2 The program director must have the authority, responsibility, and adequate time to administer the program and to ensure the fulfillment of its mission, goals and objectives.

Examples of Evidence

## Program director curriculum vitae

## Program director position description

* *Program director’s typical weekly schedule of teaching and administrative duties*
  1. There must be a system to evaluate the program director at least once per year.

Examples of Evidence

* *Narrative of evaluation system*
* *Documentation of the evaluation system*

3.4 The program must comply with applicable state and federal non-discrimination regulations.

Example of Evidence

* *Published non-discriminatory policies*

# 3.5 The program must annually review its budget, enrollment, and recruitment process.

Examples of Evidence

* Written planning process
* Budgetary projections
* Enrollment projections
* Faculty/Instructor planning

# Standard 4 - Resources and Facilities

* 1. The program must have a physical facility conducive to learning and equipment enabling it to meet its educational goals.

Examples of Evidence

* *Description of physical plant including classroom/clinical/laboratory facilities and equipment*
* *Planning studies and blueprints related to any proposed physical plant expansion, contraction or renovation which might affect program operations*
  1. The institution must provide students and faculty reasonable access to information resources related to the profession of optometry and paraoptometric education.

Example of Evidence

* *Narrative describing institutional informational resources and library service*
  1. The program must have adequate financial support to achieve its mission, goals, and objectives.
     1. The program must have financial management procedures, audits and/or controls to guarantee effective monitoring and use of its funds.

Examples of Evidence

* *Narrative describing the budgetary process*
* *Applicable financial documents*
* Budget information including but not limited to line item budget of income and expenditures for the past and present fiscal year
* Available budget projections for the next fiscal year
  1. The program must have adequate support staff, services, and resources to meet the needs of the administration, faculty, and students.

Examples of Evidence

* *Narrative describing support services and resources*
* *Organizational chart of program personnel* 
  1. There must be an advisory committee to maintain a liaison between the program and the optometric community.

Examples of Evidence

* *Advisory committee list*
* *Advisory committee minutes*
* *Narrative explaining the role of the advisory committee*
  1. Faculty of the program must have the qualifications to educate and train the students in accordance with the mission, goals and objectives of the program.

4.6.1 Faculty of the program must have a minimum of an associate degree or certification or licensure in a related field.

Examples of Evidence

* *Curriculum vitae of program faculty*
* *Position description for program faculty*
  1. The number of faculty must be sufficient to meet the mission, goals and objectives of the program.

Examples of Evidence

* *Program teaching assignments for all faculty*
* *Description of faculty/student ratio in laboratory and clinic*
  + 1. There must be published policies and procedures for faculty recruitment, retention, promotion, academic assignments and responsibilities, reporting relationships, grievances, and benefits.

Examples of Evidence

* *Narrative describing policies and procedures mentioned in standard 4.7.1*
* *Document(s) where policies and procedures mentioned in standard 4.7.1 are made available to the faculty.*
  1. There must be a faculty evaluation process that establishes goals and assesses performance of each faculty member.

Examples of Evidence

* *Narrative describing faculty evaluation process*
* *Copy of the evaluation instrument(s)*
* *Faculty/staff handbooks or union contracts that documents the evaluation process*
  1. Opportunities must be provided for program faculty to continue their professional development.

Example of Evidence

* *List of faculty/staff development activities*

Standard 5 – Students

* 1. There must be a recruitment process that attracts and retains a qualified student body.

***Examples of Evidence***

* *Current entering class statistics*
* *Admissions statistics for the past five years including number of applicants and profiles of entering class.*
* *Retention statistics for the past five years*
* *Narrative discussing recruitment plan.*
* *Recruitment materials.*
  1. Specific written criteria, policies and procedures must be adhered to during the admissions process to select students who have potential for success in the program.
     1. The program must require that the accepted applicants have completed at least high school or the equivalent

***Examples of Evidence***

* *Admissions policies, criteria and procedures*
  1. The program must provide student support services including but not limited to academic, job placement, and financial aid counseling.

Examples of Evidence

* *Narrative or documents describing academic counseling and other student support services.*
  1. The program must maintain an orderly, accurate, confidential, secure and permanent system of student records.

***Example of Evidence***

* *Narrative or description of student records maintenance programs*
  1. The program must publish and make available to students the policies and procedures on academic standards, grading, attendance, academic calendar, appeals, academic standing, dismissal and reinstatement, disciplinary conduct, due process, tuition, fees, refunds, honors, scholarship and awards, and other related matters.

***Examples of Evidence***

* *Copies of student policies mentioned in standard 5.5*
* *Document(s) where policies mentioned in standard 5.5 are published*
  1. The program must publish and provide policies and procedures regarding student complaints and maintain records of receiving, adjudicating and resolving such complaints.

***Examples of Evidence***

* *Copies of policies regarding student complaints*
* *Record of student complaints, if any*

5.7 The program’s publications, advertising and student recruitment materials and activitiesmust present an accurate representation of the program.

***Examples of Evidence***

* *Publications, written policies, advertising, websites*

5.7.1 The program must publish current and reliable information on job placement.

***Example of evidence***

* *Job placement information*

# Glossary of Terms

**Accreditation** – The process of self-study and external review which ensures that a program of optometric technician education meets or exceeds the standards applicable to that program.

**Examples of Evidence** – Documentation the program provides to the Council as evidence the program meets the standard. The examples listed are not all inclusive, and the program may choose to use all, some, or none of the examples in its documentation. However, the Council does require the program to submit appropriate documentation as evidence of meeting the standard.

**Goals** – Goals specify the end results necessary to achieve the mission; they should elaborate each of the major components of the mission. They provide clarification and specificity for components of the mission statement.

**Mission** – A statement of the fundamental reasons for a program’s existence.

**Objectives** – Statements which define outcomes attributable to the mission and goals of a program.

**Outcome** – An assessable quantity or quality relative to the overall success of a program in the achievement of its mission, goals and objectives.

**Program** – An optometric technician program is an educational program that trains individuals to support the doctor of optometry in the delivery of eye care to their patients. These programs are a minimum of one academic year in length or its equivalent.

**Publish** – To make available to the communities of interest (students and their families, counselors, education community, and the general public) by print or electronic means.

**Standard** – A measurable criterion of the quality of one or more components of a program of optometric technician education.

**Substantive Change** – New educational policies, practices or programs that affect: 1.) the program’s mission, goals and objectives; 2.) the scope, length and/or content of the program; and 3.) resources of the program.