



Submitting Requests for Continuing Education Credit

As a service, continuing education (CE) offered by local societies may be submitted to the California Optometric Association (COA) for approval of CE credit. COA is authorized by the California State Board of Optometry to approve the courses it sponsors. This provider authority extends to COA's review of local society education programs.

General Guidelines

1. CE requests for events sponsored by individuals, optometric practices or the Ophthalmic industry must be referred directly to the California State Board of Optometry for approval.
2. COA will not process local society CE requests offering more than two CE hours scheduled during these dates:

Monterey Symposium	Blackout Dates - all of CA
November 16-18, 2018	November 2 - November 30
November 15-17, 2019	November 1 - November 29
November 6-8, 2020	October 23 - November 20

Year	OptoWest	Event Date	Northern CA blackout	Southern CA blackout
2018	San Diego	2/11/2018		January 28 - February 25
	Santa Clara	3/4/2018	February 17 - March 17	
	Sacramento	4/15/2018	April 1 - April 30	
2019	San Francisco	3/3/2019	February 17 - March 17	
	Southern CA	TBA		
	Sacramento	4/7/2019	March 24 - April 21	
2020	Los Angeles	2/23/2020		February 23 - March 8
	Northern CA	TBA		
	Sacramento	4/26/2020	April 12 - May 10	

If societies have events requiring more than two hours of CE approval during these time periods, please forward them directly to the State Board of Optometry.

3. Local societies must submit their CE approval requests to COA at least four (4) weeks prior to the program date. Retroactive CE approval is not permitted by the State Board of Optometry.
4. Review the CA State Board of Optometry [Fact Sheet](#).



COA Four Step CE Approval Process

1. Submit a CE Request

Forward the Request for Continuing Education Credit Form to COA at least four weeks prior to the local society program date with the following materials for review:

- a) Provide the following information to COA:
 - Specific course title(s) with accompanying comprehensive outline describing the course content (good example—speaker's lecture notes). The outlines line must be more than the course title and a description.
 - For a one hour course the outline must include at least 1 ½ pages of content.
 - For a two hour course the outline must include at least 2 ½ pages of content.
 - The power point presentation is acceptable if available.
 - Duration of course (should be in increments of 1 hour—remember a credit hour is defined as one classroom hour – 50 minutes).
 - Updated curriculum vitae for each speaker.
 - A copy of the flyer or program being mailed, if available.
- b) Click [here](#) to add a CE event to the online COA calendar. Please complete the form and the event will be posted to the calendar within 24-48 hours of submission. Visit coavision.org and click on CE/ Events to view the CE calendar.

2. Confirmation

For your convenience, COA will offer suggested classifications of TPA, TPG, OTHER, PM for your course. When presenting more than one category in a lecture, it would be helpful to submit each topic individually to assist doctors with their record keeping. Once the course(s) is approved, the society will receive an approval letter confirming the date, name of the course, CE hours, and category.

3. Provide Proof of Attendance for Attendees

Societies are responsible for providing attendees with a Proof of Attendance at their Continuing Education Programs. The State Board requires the following information for certification of attendance:

- Name of the sponsoring organization
- Name, signature, practice address, social security number, and license number of the attending licensee
- Subject or title of the educational program
- Number of hours in actual attendance
- Date of the educational program
- Location of the educational program
- Name(s) of the course instructor(s)

4. Submit Verification Form and Attendee List to COA

- Verification form: sign and return the verification form to COA within two weeks after your event has occurred.
- Attendee list: list all of the doctors who participated and their license numbers.

What COA Keeps On File

As specified by the State Board of Optometry, COA will maintain the CE course documents submitted for up to three years. Responsibility lies with each individual doctor to maintain verification of the courses they have taken, and to track required hours needed for license renewal.



Request for Continuing Education Credit California Local Optometric Societies

CONTACT INFORMATION

Sponsor Society: _____

Education Director: _____

Office or Society Address: _____

City/State/Zip: _____

Contact Telephone Number/Email: _____

PROGRAM INFORMATION

Event Title: _____

Event Date/Time: _____

Event Location: _____

Speaker(s): _____

How Will You Monitor Attendance: _____

Total CE Hours Provided: _____

Category CE Hours (check one): Therapeutic Glaucoma Other

CE SUBMISSION REQUIREMENTS:

Please submit this form to the California Optometric Association **four (4) weeks prior** to the program date with the following requirements:

- All course title(s) and a detailed and descriptive outline for each course, including length of course.
- An updated curriculum vitae for each speaker.
- A copy of the printed program, if available.

COA OFFICE USE ONLY Date Received: _____

Send application materials to:
California Optometric Association
Brenda Stewart
Education and Events Coordinator
P.O. Box 2591, Sacramento, CA 95812
Tel. (800) 877-5738 ext. 235 • Fax. (916) 448-1423
brendas@coavision.org • www.coavision.org

Date Approved/By: _____

Not Approved/Reason: _____



Verification Form for Continuing Education

Upon completion of your continuing education program, this form must be submitted to the California Optometric Association, along with a list of attendees with their license numbers.

EVENT VERIFICATION

Sponsor Society: _____

Event Title: _____

Program Date: _____

Actual CE Hours Provided: _____

Number of Attendees: _____

SIGNATURE

I certify that the program listed above, which has previously been approved by the California Optometric Association for continuing education credit, was held and provided the noted hours of continuing education. Further, I certify that all attendees listed participated in the complete program.

Program Director (Please Print)

Telephone Number

Program Director (Signature)

Date

Submit the following:

- Signed verification form
- List of attendees with license numbers

Send materials to:

California Optometric Association

Brenda Stewart, Education & Conference Coordinator

2415 K Street Sacramento CA 95816

Tel. (800) 877-5738 • Fax. (916) 448-1423

Email brendas@coavision.org • Web Site www.coavision.org



General Business Liability Insurance Policy

When a venue requests a certificate of insurance, COA will provide you with a general business liability insurance certificate.

A general business liability insurance policy covers claims of damage and injury caused by the insured during the course of business. This insurance covers four categories: bodily injury, personal injury (which includes libel or slander), property damage, and advertising injury.

To process a Certificate of Insurance for your Society educational event, we will need the following information;

- Name of Society holding the event
- Address of Society
- Event Location (Name and Address)
- Contact name at event location
- Date of event
- Type of event

To request a certificate of insurance for your event email the above information to Louise McAtee, Financial Accounting Manager. Her email address is lmcatee@coavision.org.