

Resource Guide For New Optometrists

Congratulations!

You've just graduated and now you're a Doctor of Optometry.

This guide has been compiled and produced by POA with you in mind as you begin your career. It contains some practical steps to assist newly graduated Doctors of Optometry to get started.

The information contained in this guide is specifically designed for the individual who will practice in Pennsylvania. While much of the information will also be applicable to individuals who decide to practice in other states, the Contact Resources may be different from those included here.

Consider these issues regardless of your practice setting or practice mode ... some of them you will be required to do; others you will have to assess your need to do.

Note for using this document

An alphabetical listing of all contact information for each section is contained in the Resources section at the end of this document.



Pennsylvania Optometric Association

218 North Street
Harrisburg, PA 17101
Tel: (717) 233-6455
Fax: (717) 233-6833
www.poaeyes.org
mail@poaeyes.org

Sponsored by



Table of Contents: Your Checklist

Applying for Your Pennsylvania Optometric License	9
Pennsylvania State Board of Optometry Notification	9
Obtaining a License to Practice Optometry	9
Branch Office License	9
Change of Name or Address	9
Professional Liability Insurance	9
Continuing Education Required for Relicensure	10
What type of Practice Setting Interests You?	11
Practice & Employment Opportunities	12
Negotiating an Employment/Partnership Agreement	12
Obtaining Hospital Privileges	12
Registering as an Employer	13
Federal Employer Identification Number (FEIN) or (EIN)	13
Commonwealth of Pennsylvania Employment Development Department	13
Federal/State Unemployment Compensation	13
Payroll	13
Third Party Reimbursement for Patient Care	14
Providing Services to a Patient with Vision Benefits and Medical Plan Coverage	14
Providers of Public and Private Plans	14
Getting a National Provider Identifier (NPI)	14
Becoming an Individual Medicare Provider	14
Becoming a Medicare Group Provider	15
Applying to Provide DME (Durable Medical Equipment, i.e. glasses, contact lenses)	15
Surety Bonds & Accreditation Requirement for DMEPOS	15
Applying to Provide Services to a Railroad Medicare Patient	16
Medicare Compliance	16
Provider Enrollment, Chain and Ownership System (PECOS)	16
Medicaid/Medical Assistance	17
Becoming a Provider for Other Vision Benefit and Health Plans	17
Documentation Often Required on Provider Applications	18
Applying for Participating Provider Status with Third Party Payers	18
CAQH Universal Credentialing Datasource (UCD)	18
Special Notes	19
List of Vision Plans	20
List of Health Plans	21
List of Medical Assistance MCOs in Pennsylvania	22
Medicare Special Needs Plans	23
Insurance Coverages	24
Frequently Asked Insurance Questions and Considerations	24
Types of Coverage	25
Professional Liability Insurance	25
Business Owners Package	25
Workers' Compensation	25
Long Term Disability	25
Short Term Disability	26
Medical	26

Table of Contents: Your Checklist

Accidental Death & Dismemberment	26
Hospital Indemnity	26
Business Overhead Expense	26
Motor Vehicle	26
Property & Casualty	26
Flood	26
Life	26
Long Term Care	26
DEA Numbers and Optometry	27
Applications	27
Frequently Asked Questions About Applying for DEA Numbers	27
Joining Your Professional Association	29
Insurance for Your Profession – What’s That?	29
Pennsylvania Optometric Association (POA) and American Optometric Association (AOA)	29
POA’s Mission Statement, Vision Statement & Credo	30
AOA’s Mission & Vision Statements	31
AOA Code of Ethics	32
The Optometric Oath	33
Local Optometric Societies	34
Membership Benefits	35
Membership Information for New Graduates	35
Ascending Dues for New Licensees	35
Membership Categories	36
Active Member	36
Partial Practice Member	36
Educator Member	36
Post-Graduate Member	36
Federal Services Member	36
Retired Member	36
Life Member	37
Honorary Member	37
Distinguished Member	37
Associate Member	37
Student Member	37
Active Membership Application	38
Partial Practice Membership Application	39
Partial Practice Membership Application	40
Member Communications: Keeping You Up-to-Date	41
AOA, POA & Local Society Communications	41
Keystoner	41
Local Society Newsletters	41
Websites	41
POA <i>eyes</i> Post (Blog)	41
Email	41
Social Media	41
POA Listserv	41
Fax	41
POA’s Practice Resource Center	42
Practice Development and Management Conferences	42

Table of Contents: Your Checklist

Electronic Claims Service	42
Stationery, Business Cards, Forms, etc	43
Stationery Order Form	44
Practice Enhancers: Maximize the Return on Everyday Expenses	45
Is Joining a Buying Group Right for You?	45
C&E Vision Buying Group	46
Continuing Education	46
I.C. System Debt Collection Services	46
Credit Union	46
Public Relations/Education Programs	47
Kids Welcome Here®	47
InfantSEE®	47
Pennsylvania Diabetic Eye Health Alliance	47
School Nurse Education Programs	48
Children’s Vision: A Guide for Teachers and School Nurses	48
School Vision Screening Procedures	48
Contact Lens Education Program for School Nurses	50
Pennsylvania Vision Conservation Institute (VCI)	50
Memorial Cards	50
Save Your Vision Month/Coloring Sheets	50
Donald H. Evans, O.D., Award	50
Memorial Card Order Form	51
VISION USA	52
American Optometric Association	52
Optometry Cares – The AOA Foundation	52
Make Yourself Visible in the Community	52
Need to Know	53
Americans with Disabilities Act (ADA)	53
Auto Insurance Reform Law	53
Board Certification	54
Child Abuse Reporting Requirements	54
Disclosure of Financial or Ownership Interest	54
Motorists’ Vision Regulations	55
Electronic Health Records	55
Electronic Prescribing (also known as e-Prescribing or “e-Rx”)	56
DIRECT – Pennsylvania eHealth Partnership Authority	56
Equipment Financing	57
FTC Requirements for Prescription Release – Spectacle and Contact Lenses	57
Governing Principles	57
Optometric Practice Act	57
State Board of Optometry Rules and Regulations	57
Health Care Reform Act	58
HIPAA Compliance	58
Hunting Vision Standards	58
Keyperson Program	58
Miscellaneous Considerations	58
Attorney Relationships	58
Accountant Relationships	58

Table of Contents: Your Checklist

Financial Institutions and Advisors	58
Insurance Agent Relationships	59
Lens and Frame Supplier Relationships	59
Subscriptions and Publications	59
Chemical Hazards, Infectious Diseases & Bloodborne Pathogens	59
OSHA (Occupational Safety and Health Administration)	59
Patient Records	59
Pennsylvania/Federal Employment Posters	60
Pennsylvania Sales & Use Tax	60
Pharmaceutical Samples	61
Physicians Quality Reporting System (PQRS)	61
Prescription Pads	62
Social Security Disability and Blindness Determinations	62
Allied Organizations	63
POPAC & AOA-PAC	63
Pennsylvania Paraoptometric Association (PPA)	63
Pennsylvania College of Optometry at Salus University (PCO)	66
The Bennett Center at PCO	66
Association of Regulatory Boards of Optometry (ARBO)	66
American Board of Optometry (ABO)	66
American Academy of Optometry (AAO)	67
Pennsylvania Association for the Blind (PAB) and its Affiliates	67
American Optometric Foundation (AOF)	67
AOA Foundation	68
American Public Health Association (APHA)	68
Pennsylvania & National Rural Health Associations (PRHA & NRHA)	68
National Board of Examiners in Optometry (NBEO)	69
College of Optometrists in Vision Development (COVD)	69
Council on Optometric Practitioner Education (COPE)	69
Vision Conservation Institute (VCI)	70
Vision Expo East	70
Resources	71
American Academy of Optometry (AAO)	71
American Board of Optometry (ABO)	71
American Optometric Association (AOA)	71
Administrative Offices	71
Government Affairs Office	71
Electronic Health Records	71
Electronic Prescribing	71
Employed/Affiliated Optometric Guide	71
Health Care Reform FAQs	71
Healthy Eyes Healthy People	71
HIPAA Manual	72
InfantSEE™	72
The Archives and Museum of Optometry	72
Medicare Compliance	72
New Practitioner Handbook & Practice Guide	72
Optometry's Career Center	72

Table of Contents: Your Checklist

Optometry Cares – The AOA Foundation	72
AOA Marketplace (Order Department)	72
OSHA Regulations Publications	72
Red Flags Rule	72
Surety Bonds	72
VISION USA	72
American Optometric Association Foundation	73
American Optometric Association Political Action Committee (AOA-PAC)	73
American Optometric Foundation (AOF)	73
American Public Health Association (APHA)	73
Americans with Disabilities Act (ADA)	73
Association of Regulatory Boards of Optometry (ARBO)	73
Board Certification	73
Career Placement	73
C&E Vision Buying Group	74
Child Abuse	74
CMS Form 1500	74
College of Optometrists in Vision Development (COVD)	74
Commonwealth of Pennsylvania, Department of State, State Board of Optometry	74
Bureau of Professional & Occupational Affairs	74
State Board of Optometry	74
Application for a License to Practice Optometry	74
Application for a Branch Office License	74
Continuing Education Requirements	74
Commonwealth of Pennsylvania, Department of Labor & Industry	75
Unemployment Compensation Bureau	75
PA/Federal Employment Posters Required	75
Commonwealth of Pennsylvania, Department of Public Welfare	75
Child Abuse Telephone Reporting (Childline)	75
Child Abuse Written Reporting	75
Commonwealth of Pennsylvania, Department of Revenue	75
Sales and Use Tax	75
Commonwealth of Pennsylvania, Department of Transportation	75
Driver's License Standards	75
Commonwealth of Pennsylvania, Game Commission	75
Hunting Standards	75
Commonwealth of Pennsylvania, Pennsylvania e-Health Partnership Authority	75
Contact Lens Rule	75
Council for Affordable Quality Healthcare (CAQH)	76
Council on Optometric Practitioner Education (COPE)	76
Credit Union	76
Debt Collection Services	76
Discover Business Services	76
DMERC	76
Driver License Standards	76
Drug Enforcement Agency (DEA)	76
Electronic Claims Service	76
Electronic Health Records	76

Table of Contents: Your Checklist

Electronic Prescribing	76
Equipment Financing Corporation	77
Great America Leasing Corporation	77
EyeSeek	77
Federal Trade Commission	77
Henderson Insurance Agency	77
Healthy Eyes Healthy People	77
HIPAA	77
Hunter's Vision Standards	77
I.C. System	77
Insurance Coverage (Personal & Professional)	77
Internal Revenue Service - IRS	77
LifeStyle Eyecare Centers	77
Medicaid/Medical Assistance	78
Medicare	78
National Board of Examiners in Optometry (NBEO)	78
National Provider Identifier (NPI)	78
Novitas Solutions (formerly Highmark Medicare Services)	78
Optometry' Cares - The AOA Foundation	78
Owen Business Systems	78
PECOS	78
Pennsylvania Association for the Blind (PAB)	78
Pennsylvania Central Federal Credit Union (PCFCU)	79
Pennsylvania Chamber of Business and Industry	79
Pennsylvania College of Optometry at Salus University (PCO)	79
The Bennett Center	79
Pennsylvania Optometric Association (POA)	79
POA <i>eyes</i> Post (Blog)	79
Continuing Education	79
Electronic Claims Service	79
Excuse Forms	80
Eye Exam Report Forms	80
Kids Welcome Here®	80
Pennsylvania Diabetic Eye Health Alliance	80
Prescription Pads (spectacle, contact lens and drug)	80
Local Societies	80
Pennsylvania Optometric Political Action Committee (POPAC)	80
Paraoptometric Associations	80
Pennsylvania Paraoptometric Association (PPA)	80
American Optometric Association Paraoptometric Section	80
Physician Quality Reporting System (PQRS)	80
Practice Resource Center	81
Prescription Pads	81
Professional Liability Insurance	81
Railroad Medicare	81
National Rural Health Association (NRHA)	81
Pennsylvania Rural Health Association (PRHA)	81
Sales & Use Tax, Pennsylvania	81

Table of Contents: Your Checklist

Surety Bonds	81
United States	81
Americans with Disabilities Act (ADA)	81
Center for Medicare and Medicaid Services (CMS)	82
DMERC	82
Surety Bonds	82
Drug Enforcement Agency (DEA)	82
Electronic Prescribing (E-Prescribing/E-Rx)	83
Federal Trade Commission (FTC)/Contact Lens Rule	83
Federal Trade Commission (FTC)/Red Flags Rule	83
Federal Trade Commission (FTC)/Spectacle Prescription Release	83
HIPAA Compliance	83
Internal Revenue Service (IRS)	83
National Provider Identifier Number (NPI)	83
Physician Quality Reporting System (PQRS)	84
Prescription Pads – Tamper-resistant Information	84
Provider Enrollment, Chain & Ownership System (PECOS)	84
RAILROAD	84
Surety Bonds & Accreditation	84
United Parcel Service (UPS)	84
USI Affinity	84
Vision Conservation Institute (VCI)	84
Vision Expo East	84
VISION USA	85
Vision Service Plan (VSP)	85
VisionWeb SM	85
Special Thanks	86

Applying for Your Pennsylvania Optometric License

Pennsylvania State Board of Optometry Notification

Notifying the Pennsylvania State Board of Optometry is the first thing you should do once you decide where you are going to practice. Depending on your practice and the number of different locations you have, various supplemental licenses may be needed. Some of them are listed below to assist you with determining which you may need.

Applicants who graduate in or after 2002 and have successfully passed all three sections of the National Board of Examiners in Optometry and the Pennsylvania State Board of Optometry Laws and Regulations Examination are eligible for licensure in Pennsylvania. Applicants who graduated before 2002 should contact the State Board for more information.

Visit the SBO's website to apply for licensure.

Obtaining a License to Practice Optometry

1. Graduation from an American Optometric Association approved school of optometry.
2. Passing score on the National Board Examinations
 - Part I (*Applied Basic Science*)
 - Part II (2A and 2B **or** BS (1) and CS (2) (*Patient Assessment and Management*))
 - Part III (Clinical Skills/VRICS prior to 1993 **or** Part III/PC (3) after 1993 (*Clinical Skills*))
 - TMOD (*Treatment and Management of Ocular Disease*)

Contact the National Board of Examiners in Optometry and request scores to be sent directly to the Pennsylvania State Board of Optometry.

Branch Office License

An optometry license is valid only for the address set forth in the application and is not transferable. If you intend to practice optometry at more than one location, you must apply for and obtain, in addition to your primary license, a branch license for each location other than the primary from the Pennsylvania State Board of Optometry. Licensees must inform the State Board of Optometry in writing when no longer practicing at a branch office to change that location to "inactive status."

Change of Name or Address

Licensees must submit a request for change of name and/or address to the State Board of Optometry.

The following are acceptable name change verification documents:

1. marriage certificate;
2. divorce decree which indicates the retaking of your maiden name;
3. other legal document indicating the retaking of a maiden name;
4. for a legal name change, a copy of the court document must be provided.

Professional Liability Insurance

Optometrists licensed at the glaucoma level must carry professional liability insurance in the minimum amount of \$1,000,000 per occurrence and \$3,000,000 per annual aggregate. All other optometrists must have the insurance in the minimum amount of \$200,000 per occurrence and \$600,000 per annual aggregate.

Applying for Your Pennsylvania Optometric License

Continuing Education Required for Relicensure

Fulfilling continuing education (CE) requirements is one of the criteria for license renewal. The Pennsylvania State Board of Optometry renews licenses on a biennial (every two years) basis. Licenses expire November 30 of every even-numbered year. The Board mails renewal notices 2 to 3 months prior to the license expiration date. Notices are mailed to the most recent address the licensee has reported to the Board. The Postal Service does not forward licenses.

New licensees are exempt from the requirements of continuing education for the biennial period during which the new licensee has successfully completed the optometric examination for licensure if the applicant takes such examination within two years from his/her graduation from an accredited college or school of optometry. To find out exactly when you should begin to track your CE hours, contact the Pennsylvania State Board of Optometry.

TPA-certified optometrists must take 30 hours of continuing education (CE) every two years. Six hours must pertain to therapeutics. Four of those six hours must be glaucoma related for those ODs who are glaucoma certified. A current CPR certification is recommended but not required.

Up to a maximum of 25% (7.5 hours) of the required biennial credit hours may be obtained from sources other than a traditional classroom setting.

What type of Practice Setting Interests You?

In today's optometric practice environment, there are many options available for how and where you practice. The following offers some points to consider as you decide which practice setting best suits your needs.

ADVANTAGES	CHALLENGES
<u>Solo Practice</u>	
Independence	Risk for practice and clinical management
Clinical autonomy	Must develop own patient base
Immediate rewards for efficiency	No financial cushion
<u>Small Independent Group Practice</u>	
Greater role in governance than large group	Responsible for colleagues' performance
Shared risk and overhead	Less independence than solo practice
	Shared financial losses
<u>Large Independent Group Practice</u>	
More optometrists to spread overhead costs and financial risk	Reduced independence
Clinical synergy	Reduced governance role
Referral opportunities	Liability for group financial and clinical performance
<u>Group Practice Managed by Management Service Organization</u>	
Relief from administrative burdens	Less control over practice
Access to management expertise	
Access to capitol	
<u>Independent Practice Association</u>	
Attracts managed care business	Potential lack of involvement in contract negotiations
Develops referral relationships	Shared cost of operations
Maintains independence	Expensive to maintain infrastructure
<u>Hospital</u>	
Attracts managed care business	Hospital usually has control
Shared risk with hospital	Some payers resist negotiating with PHOs
	May be tied to inefficient hospital
<u>Employed Setting</u>	
Low financial risk	Limited income growth potential
Guaranteed paycheck	Little independence or control
Relief from practice administration	Future tied to organization's success
<u>HMO</u>	
Clinical control	Very expensive
Self-governance	Requires compliance with complex regulations

NOTE: Variations and combinations of these and other structures are possible. A business consultant or attorney can help determine the best fit for your needs. **SOURCE:** This information is excerpted from Member Desk Reference 2002, American Optometric Association and is not included in its entirety.

What Type of Practice Setting Interests You?

Practice & Employment Opportunities

Where can you look to find practice opportunities or employment? There is no “one” comprehensive source, but here are a few places for you to get started:

- Network with your colleagues and get to know the community or communities in which you think you'd like to practice
- Pennsylvania Optometric Association classified ads in newsletter (*Keystoner*) and website
- American Optometric Association's Optometry's Career Center
- American Optometric Association classified ads in publications
- Perfect EyeSite via The Bennett Center at Pennsylvania College of Optometry at Salus University
- Classified ads section in other optometric publications
- Search the internet for any eye care employment on Internet job boards
- C&E Vision Buying Group classified
- EyeSeek, provided by Vision Service Plan for VSP network provider positions available

Negotiating an Employment/Partnership Agreement

With so many ODs today practicing in employed/affiliated settings, assistance in determining all the complex elements that need to be considered in negotiating an agreement is covered very thoroughly in a manual developed by the AOA, the *Resource Guide for The Employed/Affiliated Optometrist*. It contains valuable information related to lease agreements, contract negotiations, business management for the independent contractor, leaseholder or franchise. Although the scope of this manual is limited to these topics, in some respects it may also be beneficial to doctors employed by optometric or ophthalmology practices, and even those in independent solo practice. It is vital that you select a competent attorney, accountant and insurance agent to assist you as you negotiate your way.

Obtaining Hospital Privileges

The health care delivery system in the United States is changing, and whether it is called health care reform, managed competition, managed care, or simply market-driven integration of delivery, the fact is optometry must be prepared to deliver its services in a variety of new forms. Patients need access to optometrists in their offices, in long-term care facilities, at home, and, yes, even in hospitals. Hospitals will play an important role in future health care delivery and optometrists must continue to seek and be granted hospital privileges.

AOA has developed the *Optometric Hospital Privileges Manual* to assist optometrists in determining the advantages of hospital privileges and how important optometry is to the hospital. Information about hospital bylaws and legal issues are covered in detail as well as a section of guidelines on how to obtain hospital privileges. The use of this manual must be tempered by the specific situation presented by the particular hospital to which you are applying.

Registering as an Employer

While this guide does not cover how to open a practice, please be aware that various business licenses and permits are necessary to do so. Requirements vary at the city, county and local levels and it is best to check with your local government offices. If you plan to hire employees, register with federal and state governments as an employer. As an employer and/or a business, you will be subject to collecting taxes that must be paid to federal, state and local agencies. Your legal counsel and/or accountant can help you with the necessary paperwork in the event that you're not comfortable handling this on your own.

Federal Employer Identification Number (FEIN) or (EIN)

Employers with employees, business partnerships and corporations must obtain an Employer Identification Number from the IRS.

Commonwealth of Pennsylvania Employment Development Department

Once you become an employer subject to the payroll tax laws of Pennsylvania, you must complete and submit a registration form to the Employment Development Department (EDD) within 15 days. EDD will assign you an eight-digit employer account number (State Employer Identification Number, SEIN, state ID number, or reserve account number).

Federal/State Unemployment Compensation

In addition to paying State Unemployment Compensation Insurance, there is also a small contribution required federally on your payroll.

Payroll

When you hire employees, you will immediately become responsible for reporting your new hires and remitting payroll taxes. Upon registering with the federal and state governments as an employer, you will receive the materials to file payroll taxes. If you choose not to handle payroll and its complexities yourself, there are a number of payroll specialty companies that will handle this for you. Many of them also provide assistance with employee benefits.

Third Party Reimbursement for Patient Care

Providing Services to a Patient with Vision Benefits and Medical Plan Coverage

In nearly every practice setting, you will need to know how to properly code and receive payment for your services. Most insured patients will not pay out of pocket for vision and medical eye care. Therefore, it is crucial to familiarize yourself with the various publicly-supported and private vision benefit and medical plans.

In order to be reimbursed for services provided to an insured patient, you must be a participating provider with each payer.

Providers of Public and Private Plans

While you will be able to become a provider for most vision benefit plans (such as Vision Service Plan), Pennsylvania optometrists are also reimbursed for medical eye care procedures by privately funded health plans (such as Blue Cross, Blue Shield or Managed Care Plans). The advance of optometric scope of practice in Pennsylvania has outpaced adjustments by some managed health care delivery systems to include optometrists as panel members. As one of its top priorities, POA continues to work towards gaining access to all health plan panels for Pennsylvania optometrists.

Publicly supported plans, including Medicare and Pennsylvania Medical Assistance (MA) allow optometrists to provide medical eye care services (such as foreign body removal or treatment of eye disease, etc.) to their subscribers.

Getting a National Provider Identifier (NPI)

All health care providers are required to use an NPI number when billing insurance claims. Acquiring the NPI number is the first step in becoming a provider for third party reimbursements. The NPI is a unique identifier that will improve efficiency because it identifies and enumerates health care providers at the national level and eliminates the need for multiple identifiers from different health plans.

You may need to acquire multiple NPI numbers depending on your mode of practice and practice location. If you practice in a setting as an independent contractor, employee or otherwise in a group setting where another person or entity is to receive the check for services provided, then that individual or entity must also have an NPI number. If you are practicing in multiple locations and need the payments for your services to be sent to different practice locations, then an NPI number will be needed for each of those practice locations.

When completing the application for an NPI number, the Taxonomy code for optometry is 152W00000X.

Becoming an Individual Medicare Provider

Medicare is a federal program that began in 1963 to provide medical care for those over 65 years of age, those who are permanently disabled and those with certain other disease conditions. Optometrists became eligible to bill for Medicare services through the effort of the American Optometric Association in 1986. As soon as you have your license AND have received your NPI number, apply for your Medicare Provider Registration by submitting an application (CMS-855I) to the Medicare fiduciary, along with Form 588 for electronic funds transfer and Form 460 to choose par/non-par status. The Medicare fiduciary in Pennsylvania is Novitas Solutions (formerly Highmark Medicare Services). Your application may take several weeks to process, so it is important that you

Third Party Reimbursement for Patient Care

submit it as soon as possible. Depending on your mode of practice, there may also be additional applications to complete in the process of becoming a Medicare provider.

You, as an individual provider, will receive a PTAN (Provider Transaction Access Number) linked to your NPI. See the section below if you are not in a solo unincorporated practice, as there may be other Medicare registrations required in addition to your individual registration.

Becoming a Medicare Group Provider

If you are practicing in a setting in which another individual or entity is to receive the payment for services provided, then in addition to having an individual Medicare registration, that entity or individual must also be registered with Medicare.

Also, if you as a solo practitioner have set up your practice as any type of corporate entity, that entity must have a separate Medicare Group registration.

A group entity must have an IRS Federal Employer Identification Number (FEIN or EIN) in order to apply for group status.

A claim submitted for payment to a Medicare Group Provider must contain both the individual provider registration (NPI number) and the group provider registration (NPI number) for Medicare reimbursement.

The application to reassign payment for services to a group is the CMS-855R which should be submitted to the Pennsylvania Medicare fiduciary, Novitas Solutions.

Applying to Provide DME (Durable Medical Equipment, i.e. glasses, contact lenses)

Medicare requires that each physician/supplier be assigned a DMERC (Durable Medical Equipment Regional Carrier) Supplier Number if that physician/supplier will be billing for materials (i.e. frames and lenses). If you have more than one location, you must apply for a supplier number for each location if you want separate payments to go to each location.

Complete Form 855S, 588 and 460 for each payee (an individual practitioner or group, whichever is to receive the payment) and submit to the National Supplier Clearinghouse (NSC). Include the required Form 588 setting up electronic funds transfer. NSC will process the data and will issue a supplier number (PTAN) linked to the NPI before you can submit claims to the DMERC. There are four (4) DMERC regions across the nation. Pennsylvania is in Region A.

Suppliers submitting information via the CMS-855S enrollment application or the equivalent Internet-based PECOS system are required to pay an enrollment fee for new locations, additional locations, reactivations, changes of ownership resulting in the issuance of a new Tax ID and reactivations. Fees must now be submitted through the Internet-based PECOS system.

Surety Bonds & Accreditation Requirement for DMEPOS

The Centers for Medicare & Medicaid Services (CMS) confirms that practicing optometrists are exempt from the surety bond requirement (for durable medical equipment (DME) suppliers from a 1997 federal law) as well

Third Party Reimbursement for Patient Care

as the accreditation requirement for DMEPOS (durable medical equipment, prosthetics, orthotics, and supplies) suppliers, except in rare circumstances.

Despite this, any communication from the National Supplier Clearinghouse (Palmetto) or CMS that requires a response “within 30 days” should not be ignored. Optometrists who receive a letter might want to check their Medicare DMEPOS enrollment form (855S) and their practice or business model for potential issues. Optometrists who have atypical business arrangements will want to carefully review their practice to determine whether the bond requirement might apply to them.

AOA has information on its website dedicated to the DMEPOS surety bond issue.

Applying to Provide Services to a Railroad Medicare Patient

Note: Railroad Medicare will not register you as a provider until you have registered with your local Medicare carrier (Novitas Solutions in Pennsylvania) AND have a claim to submit.

When you have a claim to submit for reimbursement for services provided to individuals with Railroad Medicare coverage, then you can sign up as a Railroad Medicare provider. Send your first claim by paper using a CMS1500 form with your NPI number and tax ID. Railroad will then register you.

Or, you may call Railroad Provider Services and request to be registered when you have your first claim to submit. Have your NPI, tax ID and PTAN number available.

Medicare Compliance

To help members tackle the often complex and ever-evolving Medicare compliance rules, the American Optometric Association's website contains detailed, up-to-date information.

Provider Enrollment, Chain and Ownership System (PECOS)

The Centers for Medicare & Medicaid Services (CMS) has placed new restrictions on ordering and referring items and services for Medicare beneficiaries and requires that physicians who wish to order or refer Medicare beneficiaries to other physicians or suppliers for items or services be enrolled in Medicare to be able to continue to provide these services to their patients. Optometrists are defined as physicians in the Medicare law and are authorized to order and refer. These new policies, if not adhered to, could limit access to care for patients and could interrupt reimbursement for the doctor who provides the ordered or referred item or service.

If you submit claims for services or items that were ordered or referred by other physicians, you will also want to make sure the ordering/referring physician is enrolled in Medicare to ensure you will be paid for providing the services or items.

Beginning April 2010, Medicare contractors began checking whether the ordering/referring physician is in the Medicare Provider Enrollment, Chain and Ownership System (PECOS). Doctors who enrolled or re-enrolled in Medicare within the last 6 years should already be enrolled in PECOS.

Third Party Reimbursement for Patient Care

Physicians who in the past have not been required to enroll in Medicare based on their practice mode (i.e., Department of Veterans Affairs, Public Health Service or Department of Defense Tricare) will now be required to be enrolled to continue ordering or referring items or services for Medicare beneficiaries. A licensed resident does not need to be enrolled but the teaching physician must be and will be identified on claims as the ordering/referring provider.

A current enrollment record is one that is in the Medicare Provider Enrollment, Chain and Ownership System (PECOS) and also contains the physician/non-physician practitioner's National Provider Identifier (NPI). To check if you have a current enrollment record in PECOS, you can call your designated carrier or A/B MAC or visit the website in the Resources section of this guide.

Medicaid/Medical Assistance

Medicaid is a federal program and Medical Assistance (MA) is Pennsylvania's program to provide health care services to the needy.

If you choose to accept MA patients in your practice and be reimbursed by MA, you will need to enroll in the Access program and then obtain a Medical Assistance Identification Number (MAID). However, in many parts of the state, MA has contracted with private managed care plans to provide care to MA beneficiaries. All managed care plans contract with a vision plan to provide basic vision care, credential and pay optometrists for medical services. You will need to know how these plans are covered in your practice area in order to determine whether you need to register with Access and the managed care plan.

Note: "Promise" is the software utilized by Medical Assistance to transmit claims. The Promise Number and the MAID number are one and the same.

Note: See section on Prescription Pads for prescription pad requirements for prescriptions written for Medicaid patients.

Becoming a Provider for Other Vision Benefit and Health Plans

In addition to Medicare and Pennsylvania Medical Assistance, there are many other provider panels available to join. You will have to examine and decide which ones are best suited to your practice needs. Above all else, make sure you understand the plan. An excellent resource is the POA's *Model Managed Care Plan* to assist you in your decisions to join a panel. Some of the questions you need to ask yourself before joining a panel follow:

How many patients are covered by this plan in my area?

Identify the major plans in your geographic area. One way to do this is to call the five (5) largest employers in your area and ask what vision benefit plan they provide to their employees. If the majority of the population in your practice location has a certain plan, it would make sense to become a provider. On the other hand, if there are virtually no patients covered by this plan in your area, question whether it would be worth your while to become a provider for that plan.

What is the reimbursement rate?

As a provider, educate yourself about:

- Reimbursement amounts for the examination and materials
- Costs for which you will be responsible
- Costs for which the patient will be responsible

Third Party Reimbursement for Patient Care

How easy is the plan to work with?

Remember, each plan is organized differently with its own procedures and claims processes. Some plans are easier to work with than others. However, you may not find this out until after you become a member.

Documentation Often Required on Provider Applications

The following documentation is often required on provider applications; however, you will need to read instructions thoroughly and check for additional and specific requirements for each plan.

1. NPI Number
2. Proof of current professional liability certificate of insurance
3. Professional license
4. DEA certificate

Applying for Participating Provider Status with Third Party Payers

Applying for participating provider status with third party payers, other than traditional Medicare programs, can be done through individual companies. A number of the most popular Vision, Health, Medical Managed Care and Medicare Special Needs Plans in Pennsylvania are listed on the next several pages.

CAQH Universal Credentialing Datasource (UCD)

Consider using this approach to simplify the application process for becoming credentialed to participate in insurance plans. The Council for Affordable Quality Healthcare (CAQH), an alliance of health plans, networks and industry trade associations, launched this initiative in 2002 to simplify provider credentialing – a critical but time-consuming process.

The Universal Credentialing Datasource (UCD) allows providers and other health professionals in all 50 states and the District of Columbia to enter credentialing information including their Type 1 National Provider Identifier (NPI) into a single, uniform online application. Free to providers, UCD meets the credentialing needs of most health plans, hospitals and other healthcare organizations. This service streamlines the initial application and re-credentialing process, and offers health organizations real-time access to reliable provider information for quality assurance and support services, such as directories and claims processing. All data submitted by providers through UCD is maintained by CAQH in a secure, state-of-the-art data center.

Several states have adopted the CAQH application as their mandated or designated provider credentialing form. The UCD application meets all related Utilization Review Accreditation Commission (URAC), National Committee for Quality Assurance and Joint Commission on Accreditation of Healthcare Organizations standards. As more insurance carriers sign on to this service, you may be given the option to fill out a paper application or use CAQH. It is free for providers and once you fill it out, it can be used by any insurance company that subscribes to CAQH. So rather than filing out numerous applications or their yearly renewal, the insurance companies may access CAQH.

Third Party Reimbursement for Patient Care

Special Notes

Read through application instructions thoroughly. If any part of the application is incomplete, or the supporting documentation is missing, the application may be delayed or returned for completion. If your address changes, be sure that you immediately submit an address change to Medicare. Medicare does not allow its checks to be forwarded to new addresses by the post office. Once a check has been returned to the carrier by the post office, future payments are placed on hold until a change of address has been submitted. Some insurances will either delete or make inactive accounts for which no claims have been submitted for a specified length of time, generally 1-1/2 to 2 years. To assure that accounts you have set up remain active, submit claims on a regular basis. Accounts which have shut down will need to be reactivated by your office which can take some time to process.

Third Party Reimbursement for Patient Care

List of Vision Plans

Vision benefit plans cover vision care services only. The following is a partial list of vision benefit plans in Pennsylvania for your reference only. POA does not endorse one plan over another and this list (in alphabetical order) is only provided as a resource.

Block Vision

(800) 243-1401 x2107

www.blockvision.com

Davis Vision (a subsidiary of Highmark Blue Shield)

(800) 999-5431

www.davisvision.com

EyeMed (a subsidiary of Luxottica Group)

(800) 521-3605

www.eyemedvisioncare.com

March Vision Care

(888) 493-4070

www.marchvisioncare.com

National Vision Administrators

(888) 682-2020

<https://www.e-nva.com/nva/content/home/home.jsf>

Optum (a subsidiary of UnitedHealth Group)

www.optum.com

Vision Benefits of America (VBA)

(800) 432-4922

www.visionbenefits.com

Vision Service Plan (VSP)

(800) 615-1883

www.vsp.com

Third Party Reimbursement for Patient Care

List of Health Plans

The following is a partial list of major health plans for your reference only. POA does not endorse one plan over another and this list (in alphabetical order) is only provided here as a resource to you.

The Aetna US Healthcare of Pennsylvania

(860) 273-0123

www.aetnaushc.com

Blue Cross of Northeastern Pennsylvania

Provider Relations: (800) 451-4447

www.bcnepa.com

**Capital Blue Cross/
Keystone Health Plan Central**

(800) 874-8433

www.capbluecross.com

CIGNA HealthCare of Pennsylvania

(800) 882-4462

www.cigna.com

Geisinger Health Plan

(800) 631-1656

www.thehealthplan.com

Health America/Health Assurance

Provider Services:

Central Pennsylvania (800) 788-5448

or (717) 540-6325 - Harrisburg office

Western Pennsylvania (800) 735-2202, ext. 7310

or (412) 553-7310 - Pittsburgh Office

Southeastern Pennsylvania (866) 522-3886

or (610) 729-7500 - Plymouth Meeting office

Northwestern Pennsylvania (814) 878-1700 -

Erie Office

www.healthamerica.cvty.com

**Highmark Blue Shield and
Keystone Health Plan West**

(866) 763-3224, Option 4

www.highmark.com

Humana

(800) 448-6262, Option "Operator" or (502) 580-7938

www.humana.com

Independence Blue Cross/Keystone Health Plan East

HMO: (215) 567-3590 or (800) 227-3119

PPO: (215) 567-3694 or (800) 332-2566

www.ibx.com/providers

United Healthcare

Provider Services: (800) 842-3210

www.unitedhealthcareonline.com

UPMC Commercial

(888) 867-2756

www.upmchealthplan.com

Third Party Reimbursement for Patient Care

List of Medical Assistance MCOs in Pennsylvania

The following is a partial list of Medical Assistance MCOs in Pennsylvania for your reference only. POA does not endorse one plan over another and this list (in alphabetical order) is only provided as a resource to you.

Aetna Health Plan (Aetna Better Health)

Provider Relations: (866) 638-1232

www.aetnabetterhealth.com

Americhoice (ACPA) – covers Southeastern PA

Provider Relations: 800-345-3627

www.americhoice.com

Amerihealth Plan (AMHP)

Provider Relations: 800-521-6007

www.amerihealth.com

Coventry Health Plan (Coventry Cares)

Provider Relations: (800) 937-6824

www.coventryhealthcare.com

Gateway Health Plan (GHP)

Provider Services: 800-392-1145

www.gatewayhealthplan.com

Geisinger Health Plan

Provider Services: 800-631-1656

www.thehealthplan.com

Health Partners (HP)

Provider Services: 888-991-9023

www.healthpartners.com

Keystone Mercy Health Plan (KMHP)

Provider Services: 800-521-6007

www.keystonemercy.com

United Healthcare Community Plan

Provider Relations: 877-842-3210

www.uhcommunityplan.com

UPMC For You

Provider Services: (800) 286-4242

www.upmchealthplan.com

Third Party Reimbursement for Patient Care

Medicare Special Needs Plans

The following is a partial list of Medicare Special Needs Plans in Pennsylvania for your reference only. POA does not endorse one plan over another and this list (in alphabetical order) is only provided as a resource to you.

AmeriHealth 65

Member Services: 1-800-645-3965

Provider Services: 1-888-850-9200

Gateway Health Plan

Member Services: 1-800-685-5209

Provider Services: 1-800-685-5205

Health Partners

Member Services General: 1-800-553-0784

Medicare Specific: 1-888-667-7367

Provider Services: 1-888-991-9023

Keystone 65 Complete

Member Services: 1-800-645-3965

Provider Services: 1-888-850-9200

United Healthcare Community Plan

Provider Relations: 877-842-3210

www.uhcommunityplan.com

UPMC For Life Health Plan

Member & Provider Services: 1-800-606-8648 (providers choose option 2)

www.upmchealthplan.com

Insurance Coverages

Frequently Asked Insurance Questions and Considerations

Why do new graduates/licensees need to consider malpractice and other types of insurance?

New graduates/licensees, as well as seasoned optometrists, can make mistakes, have accidents and experience physical losses. Sometimes these do not cause harm, but once in a while an error can cause injury to a patient. An accident can prevent you from making a living or perhaps cause damage to another person's property. It is always advisable to protect yourself and your family by purchasing insurance. In addition, some insurances are required by law. Several of those are noted below in individual insurance type sections.

How much insurance do I need?

This will depend on your individual needs. Some insurances are required by Pennsylvania laws, such as professional liability in order to practice, workers compensation for employees and motor vehicle when owning one. The minimum amount of insurance required for these coverages is specified in those laws. You will need to determine for yourself if you want or need additional coverage. For other insurances, you will need to assess your need based on your own individual circumstances.

What do you need to consider when shopping for insurance?

A prime consideration is the agent or organization with whom you are consulting, and their knowledge of PA requirements. Good advice will generally, over the long run, lend itself to value and peace of mind.

You also need to consider whether a particular type of insurance is available to you for your individual situation; for example, practice mode.

How do you choose which insurance plan, agent or carrier to use?

As you explore your options for various insurance products, remember to check into those offerings that demonstrate the criteria of:

- Value for price
- An "A" or better AM Best Rating (check it out at www.ambest.com)
- Quality of coverage
- Competitive premiums
- Reliability
- Exclusivity to membership
- Understanding your needs
- Service
- Compliance with PA regulations

Does the policy do what it should do?

- Do you have a selection of coverage limits that suit your needs?
- Who do you need to include: principals, employees, additional insureds?
- Are there extra premiums for the coverage of your business?
- How much/what kind of legal fees and court costs will be paid for covered claims?
- What lost wages can be collected if you are required to appear in court due to a claim filed against you?

Limits of Liability

- Do you have enough coverage for your contents?
- Are the limits of liability high enough?
- Some plans require minimums to participate.

Insurance Coverages

Insurance for Your Profession – What's That?

Association Programs

Many times association programs are designed for a particular industry. In some cases, discounted premiums are available along with unique program designs for the members of that industry.

Price

After you have evaluated the above qualifications, then and only then, are you ready to evaluate price. Be willing to compare insurance programs based on real value and not just price. Remember to check that you are comparing identical program benefits for the price being offered.

Types of Coverage

Professional Liability Insurance

Besides offering you some peace of mind, obtaining professional liability or malpractice insurance is required by the Optometric Practice Act. Professional liability insurance protects you against claims arising from real or alleged errors or omissions, including negligence, in the course of your professional duties. Professional liability insurance will also provide defense costs for frivolous lawsuits that have no basis or grounds, but may require a costly legal defense.

The Optometric Practice Act in Pennsylvania requires both “diagnostic pharmaceutical agents” and “therapeutic pharmaceutical agents” licenses to have coverage in the amount of \$200,000 per occurrence and \$600,000 per annual aggregate. The minimum insurance requirement for individuals certified to treat glaucoma (the highest level of licensure in Pennsylvania) is \$1,000,000 per occurrence and \$3,000,000 per annual aggregate. Often higher amounts are recommended and worth the additional premium.

You must notify the Pennsylvania State Board of Optometry within 30 days of any failure to be covered by the required amount of insurance.

If you are beginning practice as a sole proprietor or an independent contractor you will have to purchase professional liability insurance on your own.

If you are employed by another doctor or work in a clinical setting, such as an HMO, check to see if malpractice coverage is provided for you. If so, you may also want to consider purchasing additional malpractice on your own. If malpractice insurance is being procured for you, make sure that the person (employer) or entity provides you with a copy of the certificate of insurance showing you are covered.

Regardless of how malpractice insurance is provided for you, make sure to check if you are covered at an off-site location (i.e., volunteering at a school vision screening, etc.).

Business Owners Package

Protects your business property and premises from property losses or litigation due to injury or accident.

Workers' Compensation

Required by law, this coverage protects your employees in case they are injured while working within your practice. On a voluntary basis, you can also protect yourself with this coverage.

Insurance Coverages

Long Term Disability

Helps protect your income in the event you become totally disabled. Usually has a waiting period of several months before eligibility for benefit payments begin.

Short Term Disability

Helps protect your income in the event that you become disabled for limited period of time. Usually has a very short waiting period before eligibility for benefit payments begin.

Medical

Covers the majority of your medical costs in case of illness or injury. There are a variety of health care protection products available ranging from first dollar coverage to high front-end deductibles. Consider the option of a health savings account (HSA) if choosing a high deductible policy.

Accidental Death & Dismemberment

Pays a specified benefit amount in the event of a specifically-covered bodily loss.

Hospital Indemnity

Pays a specific amount in the event you are hospitalized.

Business Overhead Expense

Pays the normal and fixed expenses of running your office while you are disabled so you don't have to use your personal disability income.

Motor Vehicle

Required by law on any motor vehicle that you own, this coverage protects you in the event of an accident. You are required to turn in your motor vehicle license if you are not covered.

Property & Casualty

Protects your residence property and premises from losses or litigation due to injury or accident.

Flood

If either your office or home is located within a flood plain, you may be required to carry this type of insurance. Or, it could be an option that you may wish to consider.

Life

Group term as well as other options. Term insurance provides a large amount of benefit coverage for a small premium but does not build any cash value. Other options may build a cash value while providing a death benefit.

Long Term Care

Pays a specified benefit in the event that you require care in a long term facility.

DEA Numbers and Optometry

TPA-certified optometrists are required to have a Drug Enforcement Agency (DEA) registration number in order to prescribe certain controlled substances. Pennsylvania TPA-certified optometrists must have a DEA number to prescribe schedule III, IV and V agents. With the passage of Act 130, the DEA has determined that TPA-certified optometrists were eligible for a mid-level practitioner DEA number beginning January 1, 2001.

Applications

The DEA now has certain registration applications available on its website. An interactive form is available that allows the user to complete the form online and print it. The form can then be signed and mailed to DEA.

Tips to remember when filling out the DEA application

- **Use a business address.** The DEA will not process an application that appears to list a home address. Filling out a home address will delay your application.
 - If your business address ever changes, you must send a letter to your regional DEA office advising them of the change in address.
- **Section 1 (Business Activity)** - Optometrists must check Mid-level Practitioner and indicate "O.D."
- **Section 3 (Drug Schedules)** - Check Schedule III, IV and V.
- **Section 4 (All Applicants Must Answer):** Yes - Enter State license # (example: OEG000000); Check "N/A" on the State Controlled Substances line. Check Schedule III, IV and V (Narcotic) boxes labeled "Prescribe," "Administer," "Dispense" and "Procure."
- **Remember to enclose a check for the three-year filing fee.** The DEA will not issue a number without this fee.

Frequently Asked Questions About Applying for DEA Numbers

No. If an optometrist is not planning on prescribing controlled substances, a DEA number is not necessary. In fact, the DEA strongly opposes the use of a DEA registration number for any purpose other than the one for which it is intended – to provide certification of DEA registration in transactions involving controlled substances. The use of a DEA number as an identification number for purposes of pharmacy billing and insurance is not considered an appropriate use. Although the DEA has repeatedly made its position known to insurance companies and pharmacy benefit managers, there is no legal basis to prevent these entities from requiring or requesting a practitioner's DEA number.

Do I need two DEA numbers if I have two offices?

Yes. If an optometrist plans on procuring and storing controlled substances at multiple office locations, multiple DEA numbers will be required. Inventory and dispensing of controlled substances are tightly controlled by federal regulations; therefore, an optometrist cannot procure controlled substances and then "distribute" them to various offices. If you have questions about obtaining multiple DEA numbers for branch offices, please contact your local DEA office.

Can an optometric group get one DEA number for the whole office?

No. Each provider who plans on prescribing, administering or dispensing controlled substances should have their own DEA number. For ease of administration, however, only one provider in each practice should be responsible for procuring controlled substances and maintaining the appropriate administrative files.

DEA Numbers and Optometry

Do I have to publicly display my DEA registration certificate?

No. When doctors of optometry obtain their DEA number, they receive a certificate of registration that consists of two parts: one certificate that can be displayed on the wall and a smaller wallet-size version. The certificate has an imbedded watermark logo, which provides authentication of the certificate and also deters counterfeiting. Though the wall-sized document is suitable to hang on the wall, there is no requirement that you display your DEA registration certificate. It simply authenticates that the holder has a bona fide DEA certificate. It may be kept on file if you have a concern about keeping your DEA number secure.

Can I have my DEA number printed on my prescription pads?

No. In Pennsylvania *you cannot print your DEA number on your prescription pads*. Please see [Prescription Pads](#) in the Need to Know section for the laws that govern what must or must not be on your prescription pads in the Commonwealth of Pennsylvania.

Joining Your Professional Association

Organized optometry is a group of optometrists, from all different backgrounds representing all the various modes of practice, who have joined together to represent, advocate for, shape, protect and enhance their profession.

Pennsylvania Optometric Association (POA) and American Optometric Association (AOA)

The Pennsylvania Optometric Association (POA) is your access to membership in professional optometry and its scope of activity is primarily within the commonwealth. The American Optometric Association's scope of activity is nationwide and beyond. Your local society is your access to your colleagues in your nearby geographic area. These three levels comprise what is commonly referred to as "organized optometry."

POA represents more than 2,600 optometrists in the state and AOA represents more than 36,000 optometrists nationwide. The associations are governed by its members – optometrists like you – who are elected to leadership on their respective boards, and who are appointed to committees that serve the activities of each organization. Members convene on a regular basis with their local society and at House of Delegates sessions at state and national meetings to conduct association business.

What Can POA and AOA Do for Me?

At the most basic level, your membership is about ensuring your ability to practice optometry. You have made a significant financial investment in making optometry your profession and livelihood, and the one most valuable benefit of POA and AOA membership, regardless of your mode of practice, is the ongoing effort to protect your license to practice.

Because optometry is a legislated profession, many issues at the federal and state level can potentially affect how, when, where and what you practice. The profession you have studied and trained to practice was not always the way it is now. Through the efforts of organized optometry we have gained the right to dilate our patients, treat many ocular disease conditions, and treat patients with Medicaid and Medicare insurance. All of these expansions of the optometric profession happened because individual optometrists were members of the POA and AOA and were willing to give their time and effort to see their profession grow.

These laws can change at any moment. New laws can benefit optometry, such as the optometric scope of practice expansion; or new laws may limit us, taking away some of our practice rights and the ways we make a living. Therefore, the work is never done.

Keeping optometry's position and leverage strong with third party payers is a primary reason to maintain your membership and support of POA and AOA.

Beyond protecting and expanding the profession, POA, AOA and the local society have much more to offer the practicing optometrist. They are a conduit of information on all things pertaining to the profession of optometry, distributed through websites, email, fax, the POA *Keystoner* and AOA publications, so that you know what's going on with optometric issues. You also have access to cutting-edge continuing education through premier events. These three organizations maintain libraries and printed literature, endorse and offer insurance programs and provide numerous resource materials on all facets of the profession, and develop public relations programs.

POA's Mission Statement, Vision Statement & Credo

MISSION STATEMENT

OF THE PENNSYLVANIA OPTOMETRIC ASSOCIATION

The mission of the Pennsylvania Optometric Association is to represent the interests of Doctors of Optometry in Pennsylvania and to advance eye and vision care for the citizens of the Commonwealth.

Last Updated November 2009

VISION STATEMENT

OF THE PENNSYLVANIA OPTOMETRIC ASSOCIATION

Pennsylvania Optometric Association's vision is for the profession of optometry to be recognized as the leader in the delivery of the highest quality eye care in Pennsylvania.

Last Updated November 2009

CREDO

OF THE PENNSYLVANIA OPTOMETRIC ASSOCIATION

The Pennsylvania Optometric Association believes that:

All citizens should have the freedom to access high quality eye and vision care from a Doctor of Optometry without restriction.

Doctors of Optometry should continue to collaborate with other health care professionals to ensure that our citizens receive the best possible eye and health care.

All Doctors of Optometry should promote fellowship with their colleagues by being active in their professional association, local community, state and nation.

State laws, regulations and policies should attract the best practitioners in the profession of optometry to the Commonwealth.

Doctors of Optometry must practice to the fullest extent of their training and licensure.

Last Updated November 2009

AOA's Mission & Vision Statements

The AOA Mission

“Advocate for the profession and serve optometrists in meeting the eye care needs of the public.”

The objectives of AOA are centered on improving the quality and availability of eye and vision care. The AOA fulfills its missions in accordance with the following goals:

1. Health care and public policy related to eye care will uniformly recognize optometrists as primary health care providers and ensure the public has access to the full scope of optometric care.
2. Optometrists and other professionals will look to the American Optometric Association for professional standards, research and education leadership which serve to enhance and ensure competent, quality patient care.
3. The public, optometrists and other professionals will turn to the American Optometric Association for reliable and current information related to optometry, eye care and health care policy.

The AOA Vision

The American Optometric Association is the acknowledged leader and recognized authority for eye and vision care in the world.

Last updated March 2006

AOA Code of Ethics

It shall be the ideal, resolve, and duty of all optometrists:

- TO KEEP their patients' eye, vision, and general health paramount at all times;
- TO RESPECT the rights and dignity of patients regarding their health care decisions;
- TO ADVISE their patients whenever consultation with, or referral to another optometrist or other health professional is appropriate;
- TO ENSURE confidentiality and privacy of patients' protected health and other personal information;
- TO STRIVE to ensure that all persons have access to eye, vision, and general health care;
- TO ADVANCE their professional knowledge and proficiency to maintain and expand competence to benefit their patients;
- TO MAINTAIN their practices in accordance with professional health care standards;
- TO PROMOTE ethical and cordial relationships with all members of the health care community;
- TO RECOGNIZE their obligation to protect the health and welfare of society; and
- TO CONDUCT themselves as exemplary citizens and professionals with honesty, integrity, fairness, kindness and compassion.

Adopted by the AOA House of Delegates in June 1944

Modified in June 2007

Also adopted by the POA House of Delegates as the Code of Ethics for POA members in May 2012

The Optometric Oath

With full deliberation I freely and solemnly pledge that: I will practice the art and science of optometry faithfully and conscientiously, and to the fullest scope of my competence. I will uphold and honorably promote by example and action the highest standards, ethics and ideals of my chosen profession and the honor of the degree, Doctor of Optometry, which has been granted me.

I will provide professional care for those who seek my services, with concern, with compassion and with due regard for their human rights and dignity.

I will place the treatment of those who seek my care above personal gain and strive to see that none shall lack for proper care.

I will hold as privileged and inviolable all information entrusted to me in confidence by my patients.

I will advise my patients fully and honestly of all which may serve to restore, maintain or enhance their vision and general health.

I will strive continuously to broaden my knowledge and skills so that my patients may benefit from all new and efficacious means to enhance the care of human vision.

I will share information cordially and unselfishly with my fellow optometrists and other professionals for the benefit of patients and the advancement of human knowledge and welfare. I will do my utmost to serve my community, my country and humankind as a citizen as well as an optometrist.

I hereby commit myself to be steadfast in the performance of this my solemn oath and obligation.

Joining Your Professional Association

Local Optometric Societies

POA is comprised of 15 local optometric societies representing members practicing in specific geographic areas. Contact or visit with a local chapter for more information about an area. Get to know society members. Talk with them. Sometimes local societies may also have employment listings or practice opportunities listed in their local newsletters. Many also provide frequent and inexpensive continuing education opportunities.

List of Local Societies (with corresponding counties)

Anthracite Optometric Society

Carbon Northumberland
Schuylkill

Berks County Optometric Society

Berks

Bucks-Montgomery Optometric Society

Bucks Montgomery

Central Pennsylvania Optometric Society

Adams Lebanon
Cumberland Perry
Dauphin Snyder
Franklin York
Juniata

Chester-Delaware Optometric Society

Chester Delaware

Lancaster County Optometric Society

Lancaster

Lehigh Valley Optometric Society

Lehigh Northampton
Monroe

Mid-Counties Optometric Society

Blair Fulton
Centre Huntingdon
Clearfield Mifflin

Northeastern Optometric Society

Bradford Pike
Columbia Sullivan
Lackawanna Susquehanna
Luzerne Wayne
Montour Wyoming

Northern Optometric Society

Cameron Potter
Clinton Tioga
Elk Union
Lycoming

Northwestern Optometric Society

Clarion McKean
Crawford Mercer
Erie Venango
Forest Warren
Jefferson

Philadelphia County Optometric Society

Philadelphia

Southwestern Optometric Society

Bedford Indiana
Cambria Somerset

Western Pennsylvania Optometric Society

Allegheny Greene
Armstrong Lawrence
Beaver Washington
Butler Westmoreland
Fayette

Pennsylvania Optometric Student Society

Pennsylvania College of Optometry
Students at other colleges of optometry

Joining Your Professional Association

Membership Benefits

As a member of POA you will be entitled to many benefits. In addition to those detailed in other areas of this guide, you receive:

- Tripartite membership providing you with state, national and local representation
- Governmental & legislative advocacy
- Third party care payer advocacy
- Legislative Keyperson training, leadership development and volunteer opportunities
- Member listing in “Doctor Finder” locator services on POA’s and AOA’s websites
- Access to Members-Only sections of POA, AOA and local society websites
- Member discounts at educational events
- Access to patient education materials
- Ability to participate in AOA and POA public health projects, like InfantSEE®, Kids Welcome Here® and the Pennsylvania Diabetes Eye Health Alliance
- Complimentary classified ad listings in POA’s newsletter, the *Keystoner*, and website
- Certificate of membership
- Window decals
- Optometry and vision/eye-related educational literature

Please see other areas of this guide for additional member benefits available on a fee-for-service basis that will enhance your practice.

Membership Information for New Graduates

As soon as POA receives notice that you have received a license with a Pennsylvania address, you will immediately be granted free membership in POA, AOA and a local society for the remainder of that calendar year. In order to continue that membership into the next calendar year, you’ll need to return the Data Form enclosed with the initial mailing you’ll receive and work with POSA to receive the membership application.

Please refer to the section on Membership Categories below. All optometrists are eligible for Active membership. However, if you are not practicing in a traditional mode, you may be eligible for a different category of membership with varying dues.

Membership applications can be downloaded at www.poaeyes.org or by calling POA. To find contact information about other state optometric associations, contact the American Optometric Association or visit its website.

Ascending Dues for New Licensees

Be sure to continue your membership in organized optometry. Do it today when you have the best advantage. New practitioners are exempt from dues in the calendar year that they are first licensed. Thereafter, your reduced dues gradually increase over the next several years.

Licensees in residency or post-graduate programs receive free membership and begin or resume their dues obligation at the end of the program as long as membership has been maintained during the residency/post-graduate program. Don’t lose this opportunity by waiting.

Joining Your Professional Association

ASCENDING DUES SCALE FOR NEW LICENSEES		
	Percent Full POA & Local Society Dues	Percent Full AOA Dues
Balance of the calendar year in which you were licensed	Free/No dues	Free/No dues
First calendar year after licensure	10%	10%
Second calendar year after licensure	20%	20%
Third calendar year after licensure	50%	50%
Fourth calendar year after licensure	75%	75%
Fifth calendar year after licensure	100%	100%
2014 Full Dues	POA – \$725 Local Societies – \$20-75	\$880

Membership Categories

Active Member

A licensed doctor of optometry who is practicing in the Commonwealth of Pennsylvania and who is a member of an affiliated society and the American Optometric Association.

Partial Practice Member

A doctor of optometry who works 16 or fewer hours per week in compensated optometrically related activities in the Commonwealth of Pennsylvania. This category is specifically for those individuals who are not practicing full time whether cutting back on hours when heading toward retirement, raising a family or as a result of economic situations that reduce the number of hours in practice. (Please request Partial Practice Member application.) Pays pro-rated reduced dues based on number of days practicing per week.

Educator Member

A doctor of optometry who holds a full-time faculty or administrative position at an accredited school or college. (Please request Educator Member application.) Pays one-half AOA and POA dues, and full local society dues.

Post-Graduate Member

A doctor of optometry who is a full-time student in an accredited institution, or resident or fellow in a residency program. (Please request Post-Graduate Member application.) No dues obligation while eligible and start of sliding scale of dues is delayed until end of program as long as Post Graduate Membership is held during eligibility period.

Federal Services Member

A doctor of optometry who is a Federal Services member of the American Optometric Association or an affiliated society of POA. Pays full AOA dues and no POA or local society dues.

Retired Member

A doctor of optometry who is a member, no longer engaged in compensated optometrically related activities, not yet eligible for life membership, at least 55 years of age, and has been a member for an accumulative minimum of 25 years. This is considered a temporary category of membership while transitioning a member from one category to another over an extended period of time. Pays 20% of active member dues. AOA's Retired members pay \$100 to receive benefits or pay no dues and receives no benefits.

Joining Your Professional Association

Membership Categories, continued

Life Member

A doctor of optometry who has been a continuous member for 35 or more years and is age 65 or older, or who is permanently incapacitated. Eligibility for Life membership must be documented by the affiliated society and conferred by the Board of Directors. (Please request Life Membership application.) Pays no AOA or POA dues but may be required to pay local society dues.

Honorary Member

An individual who has rendered meritorious service to POA and/or to optometry.

Distinguished Member

A doctor of optometry who has served as president of both POA and AOA.

Associate Member

A doctor of optometry whose primary practice is in another state and is a member of that state optometric association and the American Optometric Association. Pays applicable dues to member state association and \$75 annual dues to POA.

Student Member

An optometric student who is a member of the Pennsylvania Optometric Student Society. (AOA also has a student membership program available directly through them.) Pays no dues to POA.

Active Membership Application

Pennsylvania Optometric Association, American Optometric Association & Local Society

Please return completed application with dues payment to POA, 218 North Street, Harrisburg, PA 17101. To obtain the amount of your dues (taking into consideration local society dues, AOA dues, year of licensure and time of year application is completed), contact the POA office at (717) 233-6455 or email mail@poaeyes.org. For additional information, please visit www.poaeyes.org.

Gifts and dues payments to POA, AOA and local societies are not deductible as charitable contributions for federal income tax purposes; however, they may be deductible as business expenses under other provisions of the Internal Revenue Code. Consult your tax advisor.

		Date	
Membership Category: <input type="checkbox"/> Active Membership <input type="checkbox"/> Associate Membership <input type="checkbox"/> Federal Services Membership			
Full Name		<input type="checkbox"/> Male	<input type="checkbox"/> Female
Practice Name (If different from above)			
Main Office Address		Home Address	
County (Office)		County (Home)	
Phone (Office)		Phone (Home)	
Fax		Email	
To protect our members' privacy, POA will not share, sell or otherwise distribute member e-mail addresses.			
<p>MEMBER BULLETINS VIA EMAIL: In addition to individual association-to-member correspondence, we will periodically send you Member Bulletins containing legislative and regulatory alerts as well as information on eye care benefits, clinical care, quality management, pediatric programming, continuing education and other time-sensitive news. Member Bulletins are POA-to-member communications only; recipients cannot reply to or send messages. If you do <u>not</u> wish to receive Member Bulletins via e-mail, please check here. <input type="checkbox"/></p> <p>LISTSERV: POA also hosts a member-to-member listserv, called the Communications Network. POA does not generate messages to this list; rather messages are posted by local societies and POA members, and all recipients have the opportunity to reply to the entire list or a message's sender. Typical postings include local society meeting information, clinical questions and discussions about issues related to Pennsylvania optometry. Members must opt-in to this list. If you <u>do</u> want to be added to POA's listserv, please check here. <input type="checkbox"/></p>			
Preferred Mailing Address: <input type="checkbox"/> Office <input type="checkbox"/> Home			
Date of Birth		Maiden Name (If applicable)	
Optometric Graduate of			Year
Date of Pennsylvania License		License Number	
Year of Original License (If different from above)		State of Original License	
Legislators with whom you have a personal relationship			
Spouse's Name			
Have you previously been affiliated with POA? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Have you previously been affiliated with AOA? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, which state?			
Mode of Practice: (Check all that apply.)		Areas of Specialized Practice: (Check all that apply.)	
<input type="checkbox"/> Solo Practice	<input type="checkbox"/> Employed by OD	<input type="checkbox"/> Geriatric	<input type="checkbox"/> Vision Therapy
<input type="checkbox"/> Partnership	<input type="checkbox"/> Employed by Physician	<input type="checkbox"/> Pediatric	<input type="checkbox"/> Prosthesis
<input type="checkbox"/> Group Practice	<input type="checkbox"/> Employed by Hospital	<input type="checkbox"/> Contact Lens	<input type="checkbox"/> Industrial
<input type="checkbox"/> Multidisciplinary	<input type="checkbox"/> Other:	<input type="checkbox"/> Low Vision	<input type="checkbox"/> Other:

POA OFFICE USE

Date Received	Legislative Districts (Home):	PA House	PA Senate	US House
	Legislative Districts (Office):	PA House	PA Senate	US House

Comments:

Partial Practice Membership Application

Pennsylvania Optometric Association, American Optometric Association & Local Society

Please return completed application with dues payment to POA, 218 North Street, Harrisburg, PA 17101. To obtain the amount of your dues (taking into consideration local society dues, AOA dues, year of licensure and time of year application is completed), contact the POA office at (717) 233-6455 or email mail@poaeyes.org. For additional information, please visit www.poaeyes.org.

Gifts and dues payments to POA, AOA and local societies are not deductible as charitable contributions for federal income tax purposes; however, they may be deductible as business expenses under other provisions of the Internal Revenue Code. Consult your tax advisor.

		Date	
Full Name		<input type="checkbox"/> Male	<input type="checkbox"/> Female
Average Number of Hours Per Week			
Practice Name (if different than Full Name)			
Main Office Address		Home Address	
County (Office)		County (Home)	
Phone (Office)		Phone (Home)	
Fax		Email	
<p>To protect our members' privacy, POA will not share, sell or otherwise distribute member e-mail addresses.</p> <p>MEMBER BULLETINS VIA EMAIL: In addition to individual association-to-member correspondence, we will periodically send you Member Bulletins containing legislative and regulatory alerts as well as information on eye care benefits, clinical care, quality management, pediatric programming, continuing education and other time-sensitive news. Member Bulletins are POA-to-member communications only; recipients cannot reply to or send messages. If you do <u>not</u> wish to receive Member Bulletins via e-mail, please check here. <input type="checkbox"/></p> <p>LISTSERV: POA also hosts a member-to-member listserv, called the Communications Network. POA does not generate messages to this list; rather messages are posted by local societies and POA members, and all recipients have the opportunity to reply to the entire list or a message's sender. Typical postings include local society meeting information, clinical questions and discussions about issues related to Pennsylvania optometry. Members must opt-in to this list. If you <u>do</u> want to be added to POA's listserv, please check here. <input type="checkbox"/></p>			
Preferred Mailing Address: <input type="checkbox"/> Office <input type="checkbox"/> Home			
Date of Birth		Maiden Name (if applicable)	
Optometric Graduate of			Year
Date of Pennsylvania License		License Number	
Year of Original License (if different from above)		State of Original License	
Legislators with whom you have a personal relationship			
Spouse's Name			
Have you previously been affiliated with POA? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Have you previously been affiliated with AOA? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, which state?			
Mode of Practice: (Check all that apply.)		Areas of Specialized Practice: (Check all that apply.)	
<input type="checkbox"/> Solo Practice	<input type="checkbox"/> Employed by OD	<input type="checkbox"/> Geriatric	<input type="checkbox"/> Vision Therapy
<input type="checkbox"/> Partnership	<input type="checkbox"/> Employed by Physician	<input type="checkbox"/> Pediatric	<input type="checkbox"/> Prosthesis
<input type="checkbox"/> Group Practice	<input type="checkbox"/> Employed by Hospital	<input type="checkbox"/> Contact Lens	<input type="checkbox"/> Industrial
<input type="checkbox"/> Multidisciplinary	<input type="checkbox"/> Other:	<input type="checkbox"/> Low Vision	<input type="checkbox"/> Other:

POA OFFICE USE

Date Received	Legislative Districts (Home):	PA House	PA Senate	US House
	Legislative Districts (Office):	PA House	PA Senate	US House

Comments:

Partial Practice Membership Application

POA BY-LAWS: ARTICLE II – Membership

Section 6. Partial Practice Membership

- (a) Partial Practice membership is granted to those doctors of optometry who practice or live in the Commonwealth of Pennsylvania and work three (3) days or less per week in compensated optometrically related activities and whose status for partial practice is certified annually by the member. For purposes of partial practice membership and its related dues, one day shall equal eight (8) hours.
- (b) Partial Practice members in good standing shall be considered in accrediting any affiliated society's delegate votes in the House of Delegates.
- (c) Partial Practice members shall pay dues in accordance with these by-laws.
- (d) Partial Practice members shall have the privilege of the floor in the House of Delegates.
- (e) Partial Practice members may hold elective office in this Association.

POA BY-LAWS: ARTICLE VII – Dues

Section 1. General Provisions

- (b) The annual dues for Partial Practice members shall be fifty percent (50%) of the dues of Active members.

I certify that I am eligible for Partial Practice Membership as outlined in POA By-Laws, Article II, Section 6, and understand that I must recertify my eligibility annually.

Signature of Applying Member _____

LOCAL SOCIETY CONFIRMATION

Signature of Society President or Secretary

Date

Please forward upon confirmation to the POA office.

Member Communications: Keeping You Up-to-Date

AOA, POA & Local Society Communications

Keystoner

POA's newsletter keeps you up-to-date on the most recent activities and provides information about the association and its advocacy efforts with government and regulatory agencies, third party payers, upcoming continuing education events and practice requirements.

Local Society Newsletters

Some local societies provide extensive newsletters reporting activities going on within the society or shared with other societies.

Websites

AOA, POA and some local societies have websites through which the public can view important vision care related information, including a Doctor Locator service. Some websites have "members-only" sections, which provide immediate access to a wealth of information, forms, laws, regulations, etc. that is not accessible by the public or non-members.

POAeyes Post (Blog)

POA has developed a blog that contains detailed, relevant information for POA members.

Email

POA, AOA and some local societies use email to directly communicate with members, using individual correspondence as well as member-wide emailings. Electronic communications that members receive from POA include Legislative e-Updates, POA Today, meeting announcements and local society information. POA has also established blogs to encourage member dialog on current issues. Members may choose not to receive email blasts from POA (opt-out). We respect the privacy of our members and do not share email addresses with anyone or any business outside of the organization.

Social Media

POA and AOA have a presence on Facebook (www.facebook.com/PennsylvaniaOptometricAssociation) and Twitter (www.twitter.com/poaeyes). POA's messages are geared to issues relevant to Pennsylvania optometry and benefits of POA membership.

POA Listserv

This communication vehicle provides members, local societies and POA with the opportunity to share ideas and request assistance in problem solving and information on a variety of subjects including upcoming events. Members may choose to participate on the listserv (opt-in).

Fax

POA will occasionally use fax to directly communicate with members.

POA's Practice Resource Center

POA membership provides you with access to a multitude of programs, products and services offering special rates. Membership services include all the activities and events provided by the individual organizations that comprise organized optometry with each providing a unique selection. Some are internally provided by the organization and others are available through endorsed companies.

POA's Practice Resource Center is designed to provide members with products and services that will help you develop and manage your practice. Some of these products and services are described below.

Practice Development and Management Conferences

POA's Practice Resource Center holds education programs focusing on topics related to practice development and management. Recent topics presented by experts in the field include presentations on chart documentation, coding and billing specifically for the optometry practice. The purpose of these conferences is to provide support to optometric practices.

Electronic Claims Service

Since 1994, POA's Practice Resource Center has offered an electronic claims submission service on a fee-for-service basis. You'll free your staff to do more productive work while getting quicker reimbursement. Most electronically-submitted claims are paid in half the time that it takes to pay paper claims. There are no sign-up or application fees – you pay only a nominal charge for claims submitted. There's no waiting period, either – sign up and your claims can start being transmitted within a matter of days.

Participating optometry practices provide the requisite information via mail, fax or online to the claims submission service housed at the POA office. The information is then reviewed by dedicated claims staff, data entry is completed, and clean claims are submitted electronically to the appropriate payer. Claims can be submitted to any insurance company with an NAIC number.

Although most practices today are computerized, no special equipment is needed and there is no purchase, installation, education or upgrades on hardware or software. And even if you are computerized, this service will save you and your staff many hours of time and frustration ... at less cost than you can do it yourself. This service reduces forms purchase costs because no CMS 1500 form is needed – simply use POA's streamlined, easy-to-understand and easy-to-complete form. If the capability to print out a CMS 1500 is available, the claim can be printed on plain white paper in that format and sent, or use our newly designed online submission. (Referral claims may require use of a different form.) You identify the insurance company and we'll make sure that it gets sent to the right place. An alphabetical summary by insurance company including the patient's name, identification number, date(s) of service, procedure code and the charge(s) accompanies our monthly invoice.

This is the best optometric resource to keep up with the latest filing requirements. If claim information doesn't conform, the optometry office is notified before the claim is submitted. Fewer hassles and a reduction in the number of rejections will result because claims are screened to eliminate the common errors that cause rejection and necessitate time-consuming tracking and resubmission. If the claim is rejected, the claims service staff provides the necessary support to the optometric office staff to help get the claim paid.

Stationery, Business Cards, Forms, etc

There are a variety of forms necessary for the successful practice and most of them are available through the POA and/or AOA. If you join an established practice, chances are that everything you'll need is already in place, although a number of new items will need to be purchased with your name and information on it.

POA can provide the following:

- Exam forms
- Fee slips
- PA-compliant Rx pads – spectacle, contact lens & drug (including anti-forgery tamper-resistant)
- Excuse forms
- Eye exam report forms
- Patient intake forms

Stationery Order Form

POA Member Services is waiting for your call...

Eye Examination Report Form is a quick and easy way to send exam results to schools, employers, or other health care providers! 5-1/2" w x 8-1/2" h.

Excuse your patients from employment or school. Form is 6-1/4" w x 3-1/2" h. Available with or without POA logo.

Spectacle & Contact Lens Rx pads imprinted with your name, address, telephone number and license number. AOA logo may also be added (AOA members only). Minimum order is 10 pads (1,000 forms). Please allow minimum of 2 weeks for delivery. Size of both is 4-1/4" h x 5-1/2" w.

Drug Rx Pads imprinted with your name, address, telephone number, license number and a blank for inserting a DEA number. Minimum order is 10 pads (1,000 forms). Please allow minimum of 2 weeks for delivery. Size is 4-1/4" h x 5-1/2" w.

Walnut **Certificate Plaque** to proudly display the results of your hard work and honors. Fits certificates 8-1/2" x 11"; smaller certificates will look great with a thin mat.

Call, write or fax your request for a sample copy of any form.

* * * * *

ORDER FORM

Enclosed is a check in the amount of \$_____ for: (all prices include sales tax & shipping unless otherwise noted)

- # ___ pads Excuse forms (100/pad) at \$6.25/pad
- # ___ pads Eye Exam Report forms (100/pad) at \$8.25/pad
- # ___ Please send walnut plaques at \$20.00 each to frame my Certificates.

Mail to Name: _____

Address _____

City _____ State _____ Zip Code _____

Mail order and check to: POA Member Services, 218 North Street, Harrisburg, PA 17101

For quicker delivery, call or fax order to POA Member Services:

Telephone (717) 233-6455; Fax (717) 233-6833 and then mail check.

Do not send check for Rx Pad orders; they will be billed after printing.

___ Please send 10 pads Spectacle Rx Forms at \$45.00* plus typesetting, sales tax & shipping

___ Please send 10 pads Contact Lens Rx Forms at \$45.00* plus typesetting, sales tax & shipping

___ Please send 10 pads Drug Rx Forms at \$45.00* plus typesetting, sales tax & shipping

*Duplicate (NCR paper) form sets are available at \$65.00

*Tamper resistant antiforgery paper is available for drug pads for \$55.00; duplicates for \$85.00

Information required for Rx Pads (must be mailed or faxed):

Indicate if more than one address to be printed on pads & include additional addresses and phone/fax numbers

Please print exactly as it is to appear on the Rx pad

AOA Logo imprinted on forms? (AOA members only) Yes No

Note: POA can only print Rx pads for Pennsylvania doctors.

Practice Enhancers: Maximize the Return on Everyday Expenses

Is Joining a Buying Group Right for You?

When making purchases for your practice, you should consider joining a buying group. A buying group can help your practice save time and money by providing a wide variety of information and services all in one place.

What is an optical buying group?

An optical buying group is a third party billing service that helps you manage your accounts payable. You order your frames, lenses and supplies through the vendor of your choice and charge it to your buying group account (much like using your Visa or MasterCard). Each month your participating vendors submit your purchases to the Buying Group, so that they can consolidate your purchases on one easy to read statement. Collectively, members of the Buying Group do a large volume of business, which allows the Buying Group to negotiate with manufacturers and distributors for lower pricing on products that you use in your practice every day.

Who can join an optical buying group?

Any independent practicing optometrist, ophthalmologist or optician can enroll.

Why should a new graduate join an optical buying group?

Some buying groups offer special accounts for graduates, offering a line of credit to help get them started. Also by becoming a member of a buying group, you will have immediate access to a complete vendor selection, discounts, consolidated billing and many other membership benefits that assist you in creating and maintaining a successful practice.

What should a new graduate look for in a buying group?

When selecting a buying group, a new graduate should consider these factors:

- Web-enhanced Services, i.e. Online Invoices, Frames Information, etc.
- Vendor selection: What vendors will the new graduate use in the practice?
- Ownership: What makes the buying group different/unique from other buying groups and how do they support the profession.
- Membership benefits: Volume incentive programs, continuing education seminars, prompt and helpful customer service and consultants.
- Check on various billing methods
- Check for hidden fees
- Check the grace periods and late payment policies

What tips would you recommend to someone who is researching buying groups?

- Ask how the buying group supports your profession

Is there a membership fee to join a buying group?

Enrollment is free for most buying groups. Be sure to ask because some buying groups require you to be nominated in order to become a member, or require you to commit to a minimum monthly purchase volume.

Practice Enhancers: Maximize the Return on Everyday Expenses

C&E Vision Buying Group

C&E Vision Buying Group is the buying group of choice for the Pennsylvania Optometric Association. As an endorsed buying group, C&E commits to supporting the profession. Purchases by POA members earn dues credits and provide nondues income for the association. Because C&E Vision is the optical buying group of choice, they are the only buying group that exclusively provides its members the choice of using two distinct billing methods, depending upon your practice needs and personal preferences. With over 200 optical suppliers and labs to choose from, the products and services you need are readily available.

The more you bill through C&E the more you save and earn in SOMETHING, and the more non-dues income is generated for POA.

Maximize the return from this program by ordering all of your ophthalmic materials on your buying group account through VisionWeb.

Continuing Education

Continuing education as required by the Optometric Practice Act can be obtained from a variety of sources. Meeting the CE requirements for license renewal is easily accomplished by attending events sponsored by AOA, POA and your local societies as well as a multitude of other venues. Events are published in the *Keystoner* and online at POA and local society websites.

Resources for Continuing Education

Pennsylvania Optometric Association
American Optometric Association
Local Optometric Societies
American Academy of Optometry
Pennsylvania College of Optometry
Vision Expo East

I.C. System Debt Collection Services

Utilize this service to collect debts from patients who aren't paying their accounts.

Credit Union

POA's endorsement of a credit union gives members, their staff, and their families access to credit union services. Pennsylvania Central Federal Credit Union (PCFCU) is a full service credit union providing its members with world class service. Established over sixty years ago, PCFCU is a not-for-profit financial cooperative democratically owned and run by its members. Unlike banks and other financial institutions, its excess earnings are returned directly to its members in the form of higher dividend rates, lower interest rates on loans, and low or no fees. Funds deposited with PCFCU are federally insured under the NCUA (National Credit Union Administration), a Federal Government Agency. A VISA credit card available through the credit union has a lower all-the-time rate than can be found elsewhere.

Public Relations/Education Programs

Kids Welcome Here®

Kids Welcome Here® is an award-winning multi-pronged education campaign designed by the Pennsylvania Optometric Association to increase the number of children who receive eye examinations from optometrists. Kids Welcome Here consists of five major elements: 1) materials for optometrists to use to educate their patients who have children about the importance of early, regular eye examinations; 2) materials educating school nurses about the importance of regular eye for school-aged children; 3) continuing education in pediatric vision care for optometrists; 4) consultation with the Pennsylvania Department of Health to revise the commonwealth's school vision screening program; and 5) education for school nurses regarding the revised school vision screening program as well as general eye health issues. POA is making the printed Kids Welcome Here materials available via a licensing program to other states interested in implementing a pediatric vision care initiative. POA provides free posters and brochures to members. You do not want to be without these materials in your office. They are an excellent practice builder and educational tool for your patients.

KWH's Vision is Elementary® is a companion program with school nurses as the target for this educational piece.

InfantSEE®

InfantSEE®, a public health program, managed by Optometry's Charity™ - The AOA Foundation, is designed to ensure that eye and vision care becomes an integral part of infant wellness care to improve a child's quality of life. Under this program, AOA volunteer optometrists provide comprehensive eye and vision assessments for infants within the first year of life regardless of a family's income or access to insurance coverage.

If you have any questions about InfantSEE or want to become a part of the program, please contact the AOA or POA office.

Pennsylvania Diabetic Eye Health Alliance

On June 7, 2008, Pennsylvania optometry, through its House of Delegates, made a commitment to provide expedient, comprehensive eye care to diabetic patients. The resolution called for the association to "develop and implement a statewide program to ensure the provision of timely optometric care to diabetic patients and to communicate findings to the other members of the diabetic patient's health care team." In direct response to the resolution, the Pennsylvania Diabetic Eye Health Alliance was developed.

The Pennsylvania Diabetic Eye Health Alliance (PDEHA) is a voluntary program in which Pennsylvania optometrists are asked to formalize their commitment to our mission and objectives by signing a letter of agreement. Knowing that Pennsylvania optometrists are already providing excellent care to diabetic patients, it is our hope that all members will embrace the additional components of this program that solidify optometry's role as primary eye care providers. PDEHA documents optometry's commitment to providing the highest level of care to diabetic patients, and will help optometry continue to build bridges and partnerships with third party payers and others in the health care delivery system. Members have access to a free poster that is included with POA and PDEHA membership.

Public Relations/Education Programs

To participate in the Pennsylvania Diabetic Eye Health Alliance, complete the form on the next page and return to POA. If you have any questions about PDEHA, please contact the POA office.

To order a copy of the Diabetes poster for your office, contact POA.

**Do you have
DIABETES?**

**DIABETES IS A
LEADING CAUSE OF
PREVENTABLE
BLINDNESS**

Complications often have no early visual warning signs. That's why annual dilated eye exams are an essential part of your diabetic care.

Schedule your yearly dilated eye exam here today!

Diabetic eye exams by Optometrists are covered by medical insurance. As part of your overall diabetic care, your Optometrist will communicate the results of your yearly dilated eye exam to your primary care doctor.

Optometrists, Podiatrists, Dentists and Pharmacists are important members of your diabetic health care team. Scheduling eye, foot and dental exams yearly will help you maintain your overall health. You can also help prevent or slow the development of diabetes by following your physician's medication, eating to prevent, detecting regularly, controlling high blood pressure, and avoiding alcohol and smoking.

If you have sudden changes in your vision, call our office for an appointment immediately.

POA
Pennsylvania Optometric
Association
**DIABETIC
EYE HEALTH
ALLIANCE**

School Nurse Education Programs

Children's Vision: A Guide for Teachers and School Nurses

Through the [Kids Welcome Here®](#) campaign, POA partnered with the Pennsylvania Department of Health, Division of School Health to provide a Children's Vision Education Program that is approved for Act 48 Credits. This education program, presented by POA members, provides free education to school nurses and teachers and is appropriate for in-service days and other educational meetings.

This program (usually a 2-hour presentation, allowing for a question and answer period) addresses the importance of vision to learning as well as how school vision screenings and comprehensive eye and vision examinations work hand-in-hand to serve the visual needs of Pennsylvania's children.

The program is also suited for teachers, diagnostic reading specialists, administrative staff, support staff and parents. POA encourages all members to utilize this program with their local schools.

Members can request this PowerPoint program, complete with instructions, script and handouts, to present to their local school nurses and organizations.

School Vision Screening Procedures

The Department of Health (DOH) published its final revised school vision screening procedures in May 2002, which were implemented in September of 2003. The DOH mailed copies of the new document directly to all Pennsylvania certified school nurses. A copy of the school vision screening procedures is available to print or view on POA's website.

POA created an informational program to educate nurses about the rationale for the new tests as well as how to administer them. Members can request this PowerPoint program, complete with instructions, script and handouts, to present to their local school nurses.



Letter of Agreement

I, Dr. _____, a member of the **Pennsylvania Optometric Association**, agree to adhere to the conditions and requirements of **The Pennsylvania Diabetic Eye Health Alliance** as set forth in this letter of agreement.

Conditions & Requirements

1. I shall communicate the results of all examinations to the health care professionals involved in the care of every diabetic patient, with emphasis on the diabetic patient's primary care physician. Other reports may be generated for referring ophthalmologists, internists, diabetologists, endocrinologists, etcetera as appropriate.
2. I shall provide expedient scheduling to every diabetic patient, with every effort made to schedule the patient within 1 week, or at the time interval of the physician requesting the consult.
3. I shall provide consistent reporting to third party payers for every diabetic patient.
4. I shall ensure proper billing and coding for all diabetic patients, including billing the patient's medical insurance for medical exams when available.
5. I shall embrace the alliance with other diabetic care providers, including podiatry, dentistry and pharmacy.
6. I shall follow the optometric practice standards set forth in the Pennsylvania Diabetes Primer, which includes AOA's Clinical Practice Guidelines.

WHEREFORE, I hereby sign and agree to the conditions and requirements of this Letter of Agreement.

Doctor's Signature

Date

Pennsylvania Optometric Association

218 North Street • Harrisburg, PA 17101
(717) 233-6455 phone • (717) 233-6833 fax
www.poaeyes.org

Public Relations/Education Programs

Contact Lens Education Program for School Nurses

The Contact Lens Education Program was created by members of POA's Centennial Committee as a community outreach program honoring POA's 100th anniversary in 1996 and updated in 2013. The program is designed to educate school nurses and others working with children about contact lenses, and provide them with the confidence needed to handle contact lens related eye problems successfully.

Pennsylvania Vision Conservation Institute (VCI)

The Pennsylvania Vision Conservation Institute (VCI) is a separately incorporated non-profit organization affiliated with POA whose purpose is to provide public information programming dedicated to the conservation of human vision. VCI has been recognized by the IRS as a 501(c)(3) educational, scientific and charitable organization. Thus, contributions to the VCI are tax deductible to the extent provided by law.

As a member of the Pennsylvania Optometric Association, you are automatically a member of VCI, which has local areas equivalent to POA local societies, with the addition of a local area in Beaver Valley. Each local area has an appointed public information chairperson or VCI Area Director. VCI Area Directors receive regular correspondence from the state office concerning public information programming.

VCI is funded by contributions from the Pennsylvania Optometric Association with monies received through members' use of the POA/C&E Vision Buying Group program. It also receives funding through the sale of Memorial Cards.

Memorial Cards

The Memorial Card program provides an effective way for optometrists to acknowledge the death of a patient, relative or loved one. Memorial Cards are sold in packs of 10 cards with envelopes to mail to the family of the deceased, and 10 postcards to inscribe the name of the deceased and mail back to VCI. Funds derived from the sale of these cards go to support continuing vision research and education and the Donald H. Evans, O.D. Scholarship at the Pennsylvania College of Optometry. *(See order form on next page.)*

Save Your Vision Month/Coloring Sheets

The state VCI conducts annual statewide public information programs with particular emphasis on "Save Your Vision Month" (SYVM) observed each year during March. In recent years SYVM projects have included coloring contests for elementary school children and the distribution of information regarding pediatric vision care to Pennsylvania newspapers. The state VCI office provides funding to VCI local areas for the implementation of public information activities.



Sample Save Your Vision Month Coloring Sheet

Coloring Sheets available to download from www.poaeyes.org in the [Brochures, Forms & Stationery page](#).

Donald H. Evans, O.D., Award

VCI also sponsors the Donald H. Evans, O.D., Award, which provides a \$1,000 scholarship to a graduating PA-resident senior from the Pennsylvania College of Optometry.

Memorial Card Order Form

Show your patients you care with Memorial Cards from the Pennsylvania Vision Conservation Institute (VCI).

All bequests are used to support vision education and research.

Instructions

Your memorial card packet includes 10 ivory memorial cards, 10 matching envelopes, and 10 white, pre-addressed post cards.

To use your memorial cards:

1. Mail a memorial card to your patient's family.
2. Mail a pre-addressed post card to the Vision Conservation Institute. VCI will record the memorial contribution.

The Pennsylvania Vision Conservation Institute
gratefully acknowledges
a memorial bequest
in the name of

This bequest will be used to support
vision education and research.

It is offered by

Dr. _____

on behalf of the
The Pennsylvania Vision Conservation Institute
218 North Street
Harrisburg, PA 17101

Number of packets @ \$40.00 each _____
(member rate)

Number of packets @ \$60.00 each _____
(non-member rate)

(10 cards and envelopes per packet. Postage is included.)

Name _____ Date _____

Address _____

Telephone _____

POA member Non-member (Non-members add 50% to cost of memorial cards.)

Total Charge: \$ _____

Method of Payment:

Check # _____ Please bill me

By phone: (717) 233-0925

By fax: (717) 233-6833

By mail:
Vision Conservation Institute
218 North Street
Harrisburg, PA 17101

Public Relations/Education Programs

VISION USA

VCI, in cooperation with POA, also sponsors the American Optometric Association's VISION USA program in Pennsylvania. VISION USA is a national eye care charity that provides free eye exams and glasses to low-income working families who have no eyecare insurance. Participating individual doctors of optometry, suppliers and laboratories donate their services and materials. Patients interested in the program can visit

<http://www.aoafoundation.org/vision-usa/>. Doctors interested in the program can contact visionusa@aoa.org.

American Optometric Association

The AOA has an extensive variety of educational materials available for your use to assist with educating patients, employers, students, teachers, etc. AOA has recently embarked on a nationwide public relations program to promote vision care.

Optometry Cares – The AOA Foundation

Optometry Cares - The AOA Foundation, was previously known as the American Optometric Association Foundation for Science, Education, and Charity, and was originally named the American Optometric Institute. The institute changed its name to Optometry's Charity™ - The AOA Foundation in September 2007, and then to Optometry Cares - The AOA Foundation in 2010. Contributions to the Foundation – and its entities – are tax deductible to the extent provided by law.

The mission statement for Optometry Cares is to expand eye health and vision care access to everyone in the United States in order to enhance human performance and quality of life.

Optometry Cares raises funds to support the profession's charitable and educational activities, including InfantSEE®, Optometry's Fund for Disaster Relief, the Endowment Scholarship Fund, the Archives and Museum of Optometry, VISION USA, and Healthy Eyes, Healthy People (HEHP).

Make Yourself Visible in the Community

In addition to participating in the above mentioned activities in this Section, you should develop a relationship with community-related organizations in your area and make yourself known. The satisfaction you'll get from giving to others will more than repay the time you invest.

Get to know and become active with your local Pennsylvania Blind Association affiliate. Your knowledge will be a great resource for them and your participation can be good for your practice. If you need assistance with locating your area's Association, contact the Pennsylvania Association for the Blind listed in the Resources Section of this guide.

Need to Know

Americans with Disabilities Act (ADA)

An optometric office is considered a public accommodation under the ADA. This requires that reasonable accommodation be made to allow the disabled individual to access the services in an optometric office. Reasonable accommodation includes providing auxiliary aids or services.

In all cases, an optometric office need not provide any accommodation that would pose an undue burden on the office. An undue burden is legally defined as a significant difficulty or expense. However, the courts have applied the undue burden exemption very narrowly such as it could be established that the cost was disproportionate to the overall yearly budget of the optometric office. The undue burden exemption has generally been limited to big-ticket expenses such as elaborate handicapped access systems that would be financially impractical for an office to install.

The disabled person is entitled only to a reasonable and effective accommodation, not to the best of all possible accommodations. The optometric office should work with the patient to determine the appropriate accommodation for the situation.

You cannot refuse to see a patient based on their disability or refer to another provider without a medical/optometric justification. It is a violation of the ADA to pass the cost of reasonable accommodation on to the patient.

For general assistance with treatment of disabled patients, there is a toll-free number at the United States Justice Department that can provide some guidance. There is also a toll-free number for the Access Compliance Board, a private group that helps business comply with the ADA. The Access Compliance Board is generally more useful for building issues than for most auxiliary aid issues.

Auto Insurance Reform Law

In 1990, the Pennsylvania General Assembly enacted the automobile insurance reform law. One provision of the legislation addressed compensation to any person who provides treatment, products or services to anyone making a claim as a result of an accident covered by automobile insurance. The General Assembly found that the reimbursement allowances under the Medicare program are an appropriate basis on which to calculate payments for covered services and products. Claims should be submitted on the standard CMS-1500 claim form using the appropriate procedure codes.

When you provide services or products to an injured person covered as a result of an automobile accident, doctors must bill the insurance company directly; you are not allowed to bill the patient. You must accept the insurance company's determination of the allowable charge as payment in full. You may not bill or otherwise attempt to collect the difference between their full charge and the amount paid by the insurance company. However, since Medicare reimbursement allowances are used as the basis to determine charges for automobile insurance claims, you may appeal the automobile insurance company's payment if it differs from your Medicare allowable charge profile.

Although doctors must accept the insurance company's allowance as payment in full and balance billing is prohibited, patients are responsible for payment of all services and materials that are not covered under their automobile insurance policy.

Need to Know

Since a person's auto insurance is responsible for treatment relating to injuries suffered as a result of a motor vehicle accident, it is vitally important that the doctor's office determine if the patient is seeking services or products that are covered as a result of an automobile accident and carefully record the insurance company's name, address and all claims identification information.

The matter of eyeglasses replacement may be a little different since the replacement of them can be considered property damage. When the replacement of eyeglasses is the result of damage incurred in an auto accident and there is no eye injury, the patient should pay you in full for the replacement eyewear and be reimbursed directly by his/her insurance company.

Board Certification

The entry level assessment for the practice of optometry is the National Board of Examiners in Optometry (NBEO) Examinations used by all U.S. optometry licensing boards to make initial licensing decisions immediately following graduation from an ACOE-accredited doctor of optometry degree program.

Board Certification is a voluntary process that establishes standards to demonstrate that the doctor of optometry has exceeded the basic licensing requirement(s). The process assures that a doctor of optometry maintains the appropriate knowledge, skills and experience needed to deliver quality patient care in optometry through a rigorous commitment to lifelong learning and the periodic passage of a valid, computer based examination and is designed to assess the ongoing competence of a practitioner. Board Certification does not confer legal qualification, privilege or license to practice optometry. Likewise, a license to practice optometry does not confer Board Certification.

The American Board of Optometry (ABO) is the organization through which Board Certification is obtained.

Child Abuse Reporting Requirements

Pennsylvania has mandated physician reporting for child abuse. The General Rule provides that an optometrist, in the course of employment, occupation or practice of their profession, who has reasonable cause to suspect that a child coming before them in their professional or official capacity is a victim of child abuse, is required to report that information by telephone or written report. An oral report by telephone must be followed within 48 hours by a written report. The reporting form for suspected child abuse situations is available from the Department of Public Welfare.

Disclosure of Financial or Ownership Interest

A licensed optometrist who refers a patient for health-related services, devices or products to a business, service provider, facility or entity of which the licensee or a member of the licensee's family has a financial or ownership interest to any extent or degree, shall disclose that interest prior to making the referral and shall notify the patient of freedom to choose an alternate provider. Disclosure requirements include the posting of a printed notice in the patient waiting area as well as a written notice to be signed by the patient and filed in the patient's record that the patient has been advised of such financial or ownership interest.

Motorists' Vision Regulations

Pennsylvania has mandated physician reporting. Doctors are required to report patients who drive and are unable to meet unrestricted licensing standards. POA's website contains details as well as the Department's Physician Reporting Fact Sheet and the application for the extended restricted license.

POA's website also has detailed information on general vision standards for drivers' licenses as well as a specific vision standards for school bus driver's licenses and commercial driver's licenses (CDLs).

In addition, visit POA's website for Pennsylvania's window tinting regulations.

Electronic Health Records

Electronic health records (EHRs) are the future of health care. Far more than just an efficient way to take patient information or file insurance claims, EHRs hold potential to revolutionize health care practice. They are important clinical tools with a range of functions that can be used to:

- Markedly improve the quality, safety, and efficiency of care;
- Enhance care coordination;
- Reduce health disparities among various segments of the population;
- Engage patients and their families in care; and
- Address critical public health issues.

Full utilization of EHRs will be essential if optometrists are to provide their patients the highest quality care. Moreover, EHRs are central to virtually every major plan for improvement of American health care. For that reason, meaningful use of EHRs will be essential if optometrists are to continue as an integral part of America's health care system.

The U.S. Department of Health & Human Services (HHS) is establishing a national electronic health records infrastructure, the Nationwide Health Information Network (NHIN), to make EHRs available to all Americans by 2014. The department has instituted a number of initiatives – notably the American Reinvestment and Recovery Act (ARRA) incentive program – to encourage the implementation of EHR systems in health care practices and the full utilization of EHRs in the enhancement of patient care.

CMS has implemented incentive programs to assist providers in financing the installation of EHR systems.

Information on when registration will be available for Medicaid EHR Incentive Programs in specific states is posted at Medicaid State Information.

In order to earn the incentives, providers must successfully demonstrate “meaningful use” of the technology in ways that improve quality, safety, and effectiveness of patient-centered care. Don't pass on the opportunity to participate in the EHR Incentive Program because you're just not sure what to do. Check out CMS' resources to get started!

CMS HITECH Resources

Are you eligible to participate in the Medicare or Medicaid EHR Incentive Programs? Use the tool found at the bottom of the Eligibility page on the CMS website to make that determination.

Need to Know

Eligible professionals must register in order to participate in the Medicare EHR incentive program via CMS's official website for the Medicare and Medicaid EHR Incentive Programs. However, prior to registering, it is recommended that providers first familiarize themselves with the incentive programs' requirements on the CMS website. CMS's main EHR website will answer all of your questions, from path to payment, registration guidelines and meaningful use.

Also prior to registering, providers should view the video found on the CMS website containing step-by-step instructions to help ensure your registration process is a success.

Providers are also encouraged to take the Medscape EHR Self Assessment about what you know and if you know enough. Medscape is the leading online destination used by physicians, medical students and other healthcare professionals for in-depth clinical information across 30+ specialty areas. Participation may require the user to login; however, registration is free and does not require any commitment.

CMS has a new EHR listserv that provides timely, authoritative information about the programs, including registration and attestation updates, details about the payment process, deadlines and FAQs.

The Office of the National Coordinator for Health Information Technology's (ONC) Certified HIT Product List, includes more than 130 certified EHR systems or modules and is updated frequently. ONC also has hands-on assistance available across the country through Regional Extension Centers.

The AOA has launched a comprehensive *Electronic Health Records Preparedness Program for Optometry* to help practitioners implement EHR technology in a timely manner and use it effectively to benefit patients.

Electronic Prescribing (also known as e-Prescribing or "e-Rx")

Electronic prescribing is the ability to electronically send an accurate, error-free and understandable prescription directly to a pharmacy from the point-of-care. The adoption of e-prescribing by physicians and other health care practitioners is an important element in improving the quality of patient care by reducing medication errors. Promoting e-prescribing by the government is part of the overall plan to facilitate the use of electronic medical records and to build a national electronic health information infrastructure in the United States.

Faxing a prescription is not considered a form of e-prescribing. E-prescribing technologies are often part of an electronic health record (EHR) system, but they can also function as a stand-alone system; therefore, you do not need to have an EHR system to e-prescribe.

DIRECT – Pennsylvania eHealth Partnership Authority

DIRECT is a tool developed by the U.S. Department of Health and Human Services, Office of the National Coordinator for Health Information Technology (ONC) to facilitate secure communication of health information directly from one provider to another. It is a standards-based, secure system based on e-mail protocol. Designed to replace mail and fax communications for sharing health information, it is the first step toward the adoption of more robust forms of health information exchange.

Equipment Financing

AOA's endorsement of a financing company provides you with discounted rates for purchasing equipment for your new office.

FTC Requirements for Prescription Release – Spectacle and Contact Lenses

Originally mandated by the FTC Ophthalmic Practice Rule, you are required to provide each patient with a copy of their spectacle prescription upon completion of the examination. This ruling is now also part of the State Board of Optometry Regulations for the practice of optometry in Pennsylvania.

The 2003 Fairness to Contact Lens Consumers Act (FCLCA), which took effect on August 2, 2004, requires that you provide to each contact lens patient a copy of the patient's contact lens prescription upon the completion of the fitting of the contact lens. This ruling is now also part of the State Board of Optometry Regulations for the practice of optometry in Pennsylvania.

Both of these requirements must be done automatically. No request from the patient is necessary and you may not require the patient to make such a request

FCLCA also lays out specific requirements for practitioners to follow when contacted by a contact lens mail/Internet provider of contact lenses filling a patient's prescription. The guidelines also outline the compliance requirements for both seller and prescriber when the seller requests a prescription acting as the patient's agent.

Becoming familiar with and strictly following the FTC requirements will avoid potential legal problems. Details are available at AOA's website.

Governing Principles

The practice of optometry in the Commonwealth of Pennsylvania is governed by two documents:

1. Optometric Practice Act
2. State Board of Optometry Rules and Regulations

Optometric Practice Act

The Optometric Practice Act provides the basic governing principles for the practice of optometry as approved by the legislature. A copy of the Optometric Practice Act is available from the State Board of Optometry or by mail, fax, email or website of the Pennsylvania Optometric Association.

State Board of Optometry Rules and Regulations

The Rules and Regulations are promulgated by the State Board of Optometry to provide clarification for the provisions of the Optometric Practice Act. Just a few of its many sections cover information on business practices, basic equipment you must have, defining professional and unlawful practice, certification for the uses of pharmaceutical agents and treating glaucoma, and prescription requirements. You can secure a copy of this publication from the State Board of Optometry by requesting a copy of the:

Pennsylvania Code
Title 49. Professional Vocational Standards
Department of State
Chapter 23. State Board of Optometry

Health Care Reform Act

The Patient Protection and Affordable Care Act of 2010, more commonly known as ACA, has been a major topic of concern in optometry and health care in general. The AOA and its state affiliates have been working hard to keep members informed. You can find current information on AOA's website.

HIPAA Compliance

The AOA HIPAA Security Regulation Compliance Manual provides an orderly step-by-step method to help optometrists ensure the confidentiality, integrity, and accessibility of electronic protected health information (ePHI) in their practices as required by federal regulation. Model policies and procedures are included. Proper documentation to demonstrate compliance is emphasized.

Hunting Vision Standards

There are no vision requirements for people applying for a hunting license in Pennsylvania. However, a Mandatory Vision Examination is required when applying for a hunting license after a period of suspension as a result of shooting at or causing injury to human beings while hunting.

Keyperson Program

Many of the gains made by optometry in the Commonwealth of Pennsylvania and nationally have been through diligent legislative efforts. The purpose of the Keyperson Program is to create and maintain effective communication between individual legislators of both the House and Senate (state and national) and their respective optometrist constituents. The Keyperson program provides POA and AOA with a vehicle whereby organized optometry can have immediate, personal, grass roots contact with legislators on matters of concern to the profession.

The individual optometrist has the responsibility of developing a personal rapport with their legislator and keeping the legislator informed of optometry's position on various legislative matters. It is also important that the individual keyperson report the legislator's positions back to his/her local society and POA and/or AOA. Contact your legislator soon and get to know him/her and vice versa. While it is very important for you to know your legislator, it is even more important for your legislator to know you.

Miscellaneous Considerations

Attorney Relationships

Establish a relationship with an Attorney, preferably one who is experienced with health care practices, local to where you intend to practice and can assist you with matters requiring legal counsel.

Accountant Relationships

Establish a relationship with an accountant, preferably one who is experienced with health care practices, local to where you intend to practice and can assist you with matters concerning the finances of your practice as well as personal finances.

Financial Institutions and Advisors

Establish a relationship with a financial institution and a financial advisor, who may or may not be connected to your financial institution, who can assist you with current financial needs as well as preparing for your future.

Need to Know

Insurance Agent Relationships

Establish a relationship with insurance agents who can provide you with assistance in securing the types of insurance coverage you should consider for both your personal and professional needs.

Lens and Frame Supplier Relationships

If you join an existing practice, relationships with lens and frame suppliers as well as full service laboratories will already be established. However, if you open a new practice, you will need to develop relationships with those same entities. The Resources section at the end of this document will provide you with access to a significant number of vendors through the C&E Vision Buying Group and Vision Web.

Subscriptions and Publications

In addition to the professional publications provided by professional associations, you may wish to also obtain subscriptions to the publications listed in the Resources section at the end of this document.

OSHA (Occupational Safety and Health Administration)

Chemical Hazards, Infectious Diseases & Bloodborne Pathogens

The Hazard Communication Standard (HCS), also called “Right to Know,” is designed to ensure that employers and employees are aware of chemical hazards in the workplace and how to protect themselves. Any optometric office using chemicals such as acetone, alcohol, lens-tinting dyes, or disinfection chemicals must comply with HCS.

With the expanded scope of service in the treatment and management of eye diseases and eye injuries, techniques and procedures may be used that pose an increased risk for transmission of infectious diseases within optometric practices. Attention needs to be focused on the use of appropriate office hygiene procedures and universal precautions to prevent exposure to and/or transmission of disease.

Although directed primarily at hospitals and medical and dental practices, a 1992 OSHA ruling to protect healthcare workers who may be exposed to blood and other potentially infectious materials does apply to all licensed health care professionals. As employers, optometrists are required to ensure that any of their employees who may be at risk for exposure to blood and other potentially infectious materials are appropriately protected and that the requirements of the rule are followed.

Patient Records

Rules and regulations for the retention of patient records and what must be included in them is included in the State Board of Optometry Rules and Regulations, available on POA’s website.

The release of a patient’s prescription for contact lenses and/or spectacles is covered in the Need To Know section of this resource guide in the [FTC Requirements for Prescription Release](#) section.

A patient may not be charged for a copy of their patient records but may be charged a nominal fee to “copy” those records.

Pennsylvania/Federal Employment Posters

At a minimum, employers are required to post notices of state and federal laws in a place easily accessible to all employees. There are substantial penalties for not complying with both the laws and the posting of the notices. Notices may be posted individually or you can purchase laminated posters containing all notices from the Chamber of Commerce.

The federal law requires the posting of the following notices:

- Equal Opportunity Employment is the Law
- Fair Labor Standards Act (FLSA)
- Employee Rights for Workers With Disabilities/Special Minimum Wage Poster
- Employee Polygraph Protection Act
- Job Safety and Health Protection
- Your Rights Under the Family and Medical Leave Act (Required for employers with 50 or more employees)
- Uniformed Services Employment and Reemployment Act

Pennsylvania requires the posting of the following notices (additional postings for state government employees):

- Minimum Wage Law Poster and Fact Sheet
- Abstract of Equal Pay Law
- Workers Compensation Insurance Posting
- Unemployment Compensation
- Abstract of Pennsylvania Child Labor Act (required when minors are employed)
- Hours of Work for Minors Under 18 (required when minors are employed)
- Equal Opportunity and Fair Practices Notices
- Pennsylvania Clean Indoor Act Signage for No Smoking

Pennsylvania Sales & Use Tax

Sales and Use Tax in the Commonwealth of Pennsylvania is 6% on taxable items and falls into two categories – items you purchase and items you sell.

Items you purchase:

1. You are not required to pay sales tax on items that you purchase for resale. You may be required by a vendor to provide a Pennsylvania Exemption Certificate. A link to get and print this certificate is available for you on the POA website or you can find that link in the Resources Section at the end of this guide.
2. You are required to pay sales or use tax on taxable items that you purchase for use in your practice, i.e., equipment, furniture, supplies, etc. Making these purchases from a vendor outside of Pennsylvania who does not collect sales tax does not exempt you from liability for this tax. (See Use Tax below.)

Items you sell:

1. Ophthalmic materials for the most part are not subject to Pennsylvania Sales Tax.
2. Specifically, the Sales Tax law exempts prescription eyeglasses and sunglasses, contact lenses and contact lens wetting solutions. However, contact lens cleaning solutions, non-prescription sunglasses, magnifying glasses, opera and field glasses are taxable as are items such as eyeglass holders.

Need to Know

Use Tax

Use tax is the companion tax to Sales Tax, and is owed when Sales Tax has not been charged by the vendor on a taxable purchase or service. This refers specifically to items you purchase for use as the term implies. For example, when purchasing equipment, furniture or any other taxable item from an out-of-state business not registered to collect and remit Pennsylvania Sales Tax, the purchaser is responsible for paying the 6% Use Tax to the Pennsylvania Department of Revenue. The tax is due whether the purchase is made from a sales rep, by phone, through mail order or via the Internet.

Do you need a Sales Tax License?

If you sell taxable items, you are required to register, have a sales tax license and to collect and remit sales tax on them. If you do not sell any taxable items, you do not need a sales tax license.

Vendors in Philadelphia and Allegheny counties are also required to collect and remit a local sales/use tax on taxable items. If you are in one of those two areas, you can remit the tax on the same form as you submit the PA Sales and Use Tax. As of the end of 2009, the amount in Allegheny County is 1% and in Philadelphia 2%.

Pharmaceutical Samples

Most pharmaceutical companies provide sample products to health care providers. These samples should only be utilized to initiate the treatment of an acute disease or condition, or to determine the efficacy of an agent for chronic conditions. Beyond this point, the patient should be provided with a written prescription for additional treatment. Sample products should not be provided to patients in quantity.

Physicians Quality Reporting System (PQRS)

PQRS is a reporting program that uses a combination of incentive payments and payment adjustments to promote reporting of quality information by eligible professionals (EPs).

The program provides an incentive payment to practices with EPs (identified on claims by their individual National Provider Identifier [NPI] and Tax Identification Number [TIN]). EPs satisfactorily report data on quality measures for covered Physician Fee Schedule (PFS) services furnished to Medicare Part B Fee-for-Service (FFS) beneficiaries (including Railroad Retirement Board and Medicare Secondary Payer).

Beginning in 2015, the program also applies a payment adjustment to EPs who do not satisfactorily report data on quality measures for covered professional services. This website serves as the primary and authoritative source for all publicly available information and CMS-supported educational and implementation support materials for PQRS.

Prescription Pads

The basic requirements for optometric prescription pads is included within the State Board of Optometry Rules and Regulations. You can order spectacle, contact lens and drug prescription pads through POA to ensure you are compliant with Pennsylvania and federal regulations.

In addition to the requirements included in the State Board of Optometry Rules and Regulations, an excerpt from the Pennsylvania Pharmacy Law (28 PA Code § 25.53) requires that the bottom of every prescription blank shall be imprinted with the words “substitution permissible” and shall contain one signature line for the physician’s or other authorized prescriber’s signature. In addition, the following language shall be imprinted on the bottom of every prescription blank in 8 point, upper-case print (it does not specify a particular font):

“IN ORDER FOR A BRAND NAME PRODUCT TO BE DISPENSED, THE PRESCRIBER MUST
HANDWRITE “BRAND NECESSARY” OR “BRAND MEDICALLY NECESSARY” IN THE SPACE
BELOW.”

This same section of the Pharmacy Law also prohibits the printing of the federal DEA number on the prescription blank.

Tamper-resistant Anti-forgery Requirements

Beginning October 1, 2008, all written prescriptions for Medicaid recipients must be on paper that meets all three baseline characteristics of tamper-resistant pads. CMS has outlined the three baseline characteristics as those that: (1) prevent unauthorized copying of a completed or blank prescription form; (2) prevent the erasure or modification of information written on the prescription by the prescriber; or (3) prevent the use of counterfeit prescription forms.

States are responsible for defining specific features that meet the baseline characteristics in order for a prescription to be considered tamper-resistant in that State. The Commonwealth of Pennsylvania currently supports the CMS requirements.

Please note that electronic prescriptions, faxed prescriptions and prescriptions sent over the telephone are exempt from this requirement.

Failure to comply with this requirement could result in a withholding of Medicaid reimbursement.

See the Resource section of this guide for links to additional information on CMS’ requirements.

Social Security Disability and Blindness Determinations

Effective April 7, 2007, optometrists, except those in the US Virgin Islands, are considered “acceptable medical sources” for the purposes of disability and blindness determinations and decisions the US Social Security Administration makes under Titles II and XVI of the Social Security Act. In addition, to the extent that Medicare entitlement and Medicaid eligibility are based on qualifications for disability benefits under Title II or disability or blindness under Title XVI, these final rules affect the Medicare and Medicaid programs.

Allied Organizations

POPAC & AOA-PAC

The Pennsylvania Optometric Political Action Committee (POPAC) and the American Optometric Association Political Action Committee (AOA-PAC) are voluntary non-profit unincorporated committees of optometrists, their families and others interested in optometric care. The committees are independent and autonomous and not affiliated with any political party. POPAC operates on the state level and AOA-PAC operates on the federal level. They promote comprehensive eye care through political action.

These PACs exist because the Pennsylvania Optometric Association and the American Optometric Association are prohibited by law from contributing to political campaigns, so we must have separate organizations to collect and spend monies for this purpose. POPAC and AOA-PAC, as political action committees, are legally authorized to receive voluntary donations and make contributions to political campaigns.

Optometry must be able to support lawmakers who will at least listen with open minds to our problems and suggestions. Frequently, major decisions affecting eye care and the profession of optometry are legislative decisions. Many legislators support good eye care legislation; some do not. Lawmakers who support good optometric eye care deserve support from those who value their commitment.

The major purposes of PACs are:

1. to make contributions, from funds or other property received from individuals, to candidates and political committees, without regard to party affiliation, who have demonstrated their interest in vision care;
2. to promote the improvement of vision care, the public health and government by encouraging optometrists and others to take a more active and effective part in government affairs;
3. to encourage optometrists and others to become more aware of government, the important political issues, and the records of office holders and candidates;
4. to assist optometrists and others in organizing themselves for more effective political action;
5. to raise funds for the aforementioned purposes; and
6. to do any and all things necessary and/or desirable for the attainment of the purposes stated above.

POPAC is governed by a three member Committee and AOA-PAC is governed by a Board of Directors. All are appointed without regard to personal political affiliation and comprised of knowledgeable leaders in the profession.

Contributions to the PACs may only be received from individuals. The PACs cannot, by federal law, receive funds from a corporation. Contributions to PACs are not tax deductible.

Pennsylvania Paraoptometric Association (PPA)

A paraoptometric is any person employed in an optometric office by a licensed optometrist. The duties of these professionals may include, but are not limited to, front office management (receptionist, data processor, billing clerk, collections, etc.), preliminary testing (acuties, blood pressure, tonometry, keratometry, color vision, stereo, motilities, etc.), frame styling, dispensing, buying, inventory, frame repair, lab work, contact lens dispensing, teaching and follow-up, vision therapy, visual field testing and fundus photography.

The Pennsylvania Paraoptometric Association Membership Classifications:

1. **Active** – employed by a doctor of optometry who is a member of the Pennsylvania Optometric Association,
2. **Associate** – engaged in an occupation which serves the ophthalmic community or employed by an accredited ophthalmic educational institution, or
3. **Honorary** – individuals who have rendered some meritorious service to the PPA or to optometry
4. **Student** – individuals attending any accredited optometric technician program.

Like organized optometry, the Paraoptometric has access to membership at the local, state and national levels through a local society, which is usually associated with the local optometric societies established by POA. Each of these organizations provides a variety of benefits and are governed by a Constitution and By-Laws and a Board of Directors or Section Council elected by the membership. Each organization establishes its own dues structure.

The purpose of these groups is to promote the ideals of optometry and maintain the ethics and moral obligations of this health profession. Much of the activity of this group is directed toward continuing education of the paraoptometric. PPA publishes a newsletter, *Paraeyes*, for its members. It also provides access to a Reference Resource Library, which includes many educational study books and manuals to assist in the preparation for taking the AOA Assistant's/Technician's certification exam. PPA has published a Paraoptometric Reference Manual, which can be purchased by members and is an invaluable tool for either the entry level staff person or the seasoned veteran.

Paraoptometrics who wish to be recognized for their competence in a variety of areas can become certified through the credentialing process established by the American Optometric Association Paraoptometric Section. The Commission on Paraoptometric Certification (CPC) is the certifying body. Paraoptometric certification offers candidates the opportunity to advance their careers, become a part of the clinical team, and provides a formal declaration of education and skill achievement in the field of paraoptometry.

A Certified Paraoptometric reinforces your professional image, enhances patient satisfaction, and increases the potential for additional referrals to your practice.



Pennsylvania Paraoptometric Association Paraoptometric Reference Manual

Name _____

Address _____

Phone _____ Fax _____

Quantity	Subtotal/Total
# _____ PPA Member @ \$25.00 ea.	\$ _____
# _____ Non-PPA member @\$40 ea.	\$ _____
# _____ <i>Postage and handling @ \$7 ea.</i>	\$ _____
TOTAL AMOUNT DUE	\$ _____

Checks payable to: PENNSYLVANIA PARAOPTOMETRIC ASSOCIATION

Mail form and check to: Theola Amundson, CPOT, 118 Scotland Avenue, Punxsutawney, PA 15767 (814) 938-7697

Thank you for your order. Manual will be mailed to receipt of payment.

With our mutual love of paraoptometry at heart

**Pennsylvania Paraoptometric Association
Membership Application**

I wish to apply for membership as an

Active (\$40)

Associate (\$40)

Student (\$7)

PERSONAL:

Name _____ CPO, CPOA, CPOT, _____
Last First MI Circle One
other

Home Address _____

City _____, State _____ Zip _____

Email _____ Phone _____

EMPLOYER:

Name of Practice _____

POA Optometrist(s) _____

Address _____

City _____, State _____ Zip _____

Email _____ Phone _____

Fax _____

Signature of Sponsoring POA Optometrist _____

Please send completed application with check, money order or credit card information to:

Cindy Whitman, CPO

20 Main St.

Bradford, Pa 16701

Fax 814-368-5855

Credit Card Payment Visa Master Card Discover

Card # _____ exp ____/____

Authorized Signature _____

Allied Organizations

Pennsylvania College of Optometry at Salus University (PCO)

Pennsylvania is fortunate to have the Pennsylvania College of Optometry (PCO) within its boundaries. POA and PCO have worked closely over the years to enhance the profession through its combined interests in keeping optometrists in the Commonwealth up to date with education. In 2008, PCO established Salus University, which allows the institution to provide availability of health-related degree programs in addition to optometry.

The Bennett Center at PCO

The Irving Bennett Business & Practice Management Center at the Pennsylvania College of Optometry is a resource center established to provide practice management assistance to students, alumni and all eye care professionals in meeting the demands of an ever-changing health care and business environment. The staff and an Advisory Board, which is responsible for running the center, consist of top eye care practitioners and business executives of major optical companies and laboratories.

One of the Center's major accomplishments is its specialized placement network program, "Perfect EyeSite." This web-based program is available for all eye care practitioners seeking an optometrist and for any student or practicing optometrist seeking an opportunity.

Additional services and advice include full practice appraisals/evaluations at a moderate fee (endorsed by the AOA); partnership, mergers and buy/sell agreements; expense sharing concepts; impartial mediation; retirement preparation; buying and selling records; and review of employment and independent OD contracts.

Association of Regulatory Boards of Optometry (ARBO)

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 provides an OE Tracker card to licensees that can be used to track continuing education credits and thereby assist licensees to know their continuing education renewal status and outstanding hours needed to renew their license(s). You can view your continuing education renewal status and continuing education posted by the date completed.

COPE, the national clearinghouse for optometry CE courses, is currently accepted by 52 boards of optometry.

[\(Also see Council on Optometric Practice Education - COPE.\)](#)

American Board of Optometry (ABO)

The American Board of Optometry (ABO) was incorporated in 2009 to oversee the process for board certification of optometry. The first examination for Board certification in optometry was given in June 2011.

The ABO was founded by the American Academy of Optometry, American Optometric Association, American Optometric Student Association and the Association of Schools and Colleges of Optometry. Prior to the incorporation of the ABO, these four optometric stakeholders signed a Memorandum of Understanding regarding their support. The first Board of Directors was appointed by nominations from these founding organizations.

[\(See also Board Certification.\)](#)

Allied Organizations

American Academy of Optometry (AAO)

Founded in 1922, the goal of the American Academy of Optometry is to maintain and enhance excellence in optometric practice by fostering research and the dissemination of knowledge in both basic and applied vision science. Since its founding, the Academy's success in achieving this objective has moved the Academy to the forefront of American and international optometry and made fellowship in the Academy a significant and cherished achievement

Academy Fellows represent all facets of the profession. In qualifying for and maintaining fellowship, individuals are evaluated against the highest standards of professional competence. The letters "FAAO" (Fellow of the American Academy of Optometry) after an optometrist's, scientist's or other qualified person's name signify to colleagues and patients that rigorous qualifications for fellowship have been met. Fellowship is open to optometrists and other professionals who demonstrate that they meet Academy standards. Only Fellows may use the "FAAO" designation.

Of particular interest to certain fellows are eight sections devoted to optometric specialties. Several sections offer a Diplomate program challenging fellows to study for a higher level of competence.

Pennsylvania Association for the Blind (PAB) and its Affiliates

The Pennsylvania Association for the Blind (PAB) has been helping people with vision impairment achieve independence since 1910. With 100 years of experience in helping visually impaired people develop life skills and achieve independence, the PAB brings innovative programs and resources to communities across Pennsylvania dedicated to preventing, preparing for and managing vision loss for the Commonwealth's citizens. Its services span a broad spectrum to meet the varied needs of those with vision impairment including individual training, workshops and seminars, transportation assistance, rehabilitation, employment opportunities, summer instructional programs for children, vision screenings, support groups, counseling, and more. PAB works closely with its member agencies to help those it serves gain self-confidence and self-determination. PAB was the first non-profit statewide service provider for the blind and visually impaired in the country and remains one of only three in the nation today. Through hard work and dedication, PAB is building a stronger more independent blind and visually impaired community, offering new life and experiences to many and hope for the future.

There are optometrists serving on the Pennsylvania Association for the Blind (PAB) Board of Directors and others who serve on PAB affiliates' boards of directors. There are also optometrists who provide clinical care for PAB affiliates. For more information on how you can become active with PAB or one of its affiliates, visit the POA or PAB websites.

American Optometric Foundation (AOF)

The American Optometric Foundation, founded in 1947, is a philanthropic organization that develops and provides financial support for optometric research and education in vision and eye health. AOF is proud to be an affiliate of the American Academy of Optometry.

Its goals are:

- to solicit, receive and invest grants, bequests, donations, and other funds for the purpose of upholding, broadening, fostering, and promoting optometric education and research in vision and eye health;
- to provide fellowships at the graduate level to students planning a teaching and/or research career in vision and eye health;

Allied Organizations

- to recognize and honor achievements which further the visual welfare of humanity; and
- to foster inter and intra-professional relations and representation with organizations and groups that share common goals.

Funding for AOF is provided by contributions from optometrists, corporations, other foundations, optometric auxiliaries, state associations, and private citizens interested in vision care.

AOA Foundation

The American Optometric Association established the American Optometric Association Foundation for Science, Education, and Charity (formerly called the American Optometric Institute and now called Optometry's Charity™ – The AOA Foundation), a Missouri non-profit corporation. AOAF has been recognized by the IRS as a 501(c)3 educational, scientific and charitable organization. Thus, contributions to the AOAF – and its entities – are tax deductible to the extent provided by law.

[Please see Optometry Cares – The AOA Foundation in the Public Relations/Education Programs section for more information.](#)

American Public Health Association (APHA)

APHA is an Association of individuals and organizations working to improve the public's health and to achieve equity in health status for all. The American Public Health Association (APHA) is the oldest and largest organization of public health professionals in the world, representing more than 50,000 members from over 50 occupations of public health influencing policies and setting priorities in public health for over 125 years.

Throughout its history of being in the forefront of numerous efforts to prevent disease and promote health, it promotes the scientific and professional foundation of public health practice and policy, advocates the conditions for a healthy global society, emphasizes prevention and enhance the ability of members to promote and protect environmental and community health.

The Vision Care Section, established in 1979, has introduced 16 APHA policy resolutions that were passed into policy and led to strong support of optometry, such as providing testimony before Congress in 1985 in support of including optometric services under Medicare, sending a resolution to state legislators supporting optometrists' use of TPAs in 1990; and sending a resolution supporting optometry's role in glaucoma diagnosis and management to national health associations in 1997. APHA has supported optometry through the years and it is important that optometrists support APHA by becoming members.

Pennsylvania & National Rural Health Associations (PRHA & NRHA)

The NRHA, and its state counterpart, the PRHA, are nonprofit member organizations that provide leadership on rural health issues. Their mission is to improve the health and well-being of rural Americans and to provide leadership on rural health issues through advocacy, communications, education, research and leadership. Their membership is made up of a diverse collection of individuals and organizations, all of whom share the common bond of an interest in rural health.

Allied Organizations

National Board of Examiners in Optometry (NBEO)

The mission of the NBEO is to serve the public and the profession of optometry by developing, administering, scoring, and reporting results of valid examinations that assess competence. They provide comprehensive information about the National Board of Optometry exams and can answer questions and assist in preparation for the licensing examinations in the various states.

College of Optometrists in Vision Development (COVD)

The College of Optometrists in Vision Development (COVD) is an international membership association of eye care professionals including optometrists, optometry students, and vision therapists. Established in 1971, COVD provides board certification for eye doctors and vision therapists who are prepared to offer state-of-the-art services in Behavioral and developmental vision care; Vision therapy; Visual rehabilitation. These specialized vision care services develop and enhance visual abilities and correct many vision problems in infants, children, and adults.

Council on Optometric Practitioner Education (COPE)

Optometric continuing education (CE) is the primary method used by optometric licensing boards to certify continuing competence of licensed optometrists. There are a myriad of formats by which each optometry board or licensing jurisdiction approves CE courses, disseminates course information, records course attendance, and retrieves practitioner data on course completion. Other state boards duplicate much of the work done by one state board, and many boards approve the same CE courses every year.

The COPE is a national clearinghouse for all CE courses of a statewide, regional or national scope, created to remove these duplicative efforts by state boards, instructors, and program administrators.

Organizationally, the COPE is a committee of the Association of Regulatory Boards of Optometry (ARBO), which is the association that currently represents 50 United States optometry boards, four United States territories/ jurisdictions, and two Canadian boards.

COPE's mission is to:

- coordinate the review and approval of continuing optometric education courses on behalf of state boards on a national basis;
- reduce duplication of effort by state boards;
- create a uniform method of recording continuing education courses on a national basis;
- be the clearinghouse for information about continuing education programs and courses utilized by licensed optometrists to fulfill their continuing education requirements for license renewal; and
- encourage program sponsors to offer high quality CE in appropriate settings with adequate administrative structure.

To create this national clearinghouse, participating state boards have agreed upon: standards for administration of continuing education courses; a standard form for submission for course approval; and a standard form for reporting continuing education courses.

[\(See also Association of Regulatory Boards of Optometry \(ARBO\).\)](#)

Allied Organizations

Vision Conservation Institute (VCI)

[See Public Relations Section/Pennsylvania Vision Conservation Institute.](#)

Vision Expo East

Vision East is a fashion and medical eyecare event where eyecare professionals gather to experience the energy and international style unique to New York. The expansive show floor and comprehensive education provide an opportunity to discover the latest trends in eyewear and advances in eyecare technology and business practices. All disciplines in the ophthalmic community enjoy a welcoming and valuable networking experience which delivers professional growth and business success. It is not uncommon to see ophthalmologists, optometrists and opticians sitting next to each other in several different courses.

The Pennsylvania Optometric Association works with Vision Expo East to provide another venue of educational opportunities to its members. This alliance provides POA members with discounts for attending the event which is held in the Spring of each year in New York City.

Resources

Sorted alphabetically by primary organization. If you have trouble connecting to the websites, copy and paste the URL into your web browser.

American Academy of Optometry (AAO)

6110 Executive Boulevard, Suite 506
Rockville, MD 20852
Phone: (301) 984-1441
Fax: (301) 984-4737
AAOptom@AAOptom.org
www.aaopt.org

American Board of Optometry (ABO)

243 North Lindbergh Boulevard, Suite 312
St. Louis, MO 63141
Phone: 314-983-4244
info@abopt.org
www.abopt.org

American Optometric Association (AOA)

Administrative Offices

243 North Lindbergh Boulevard
St. Louis, MO 63141
Phone: (800) 365-2219 or (314) 991-4100
Fax: (314) 991-4101
www.aoa.org

Government Affairs Office

1505 Prince Street, Suite 300
Alexandria, VA 22314
Phone: (703) 739-9200 or (800) 678-9262
Fax (703) 739-9497
www.aoa.org

Electronic Health Records

www.aoa.org

Electronic Prescribing

www.aoa.org

Employed/Affiliated Optometric Guide

www.aoa.org

Health Care Reform FAQs

www.aoa.org

Healthy Eyes Healthy People

www.aoafoundation.org

Resources

HIPAA Manual

www.aoa.org

InfantSEE™

www.aoafoundation.org

The Archives and Museum of Optometry

Phone: (800) 365-2219 or (314) 991-4100

Fax: (314) 991-4101

www.aoafoundation.org

Medicare Compliance

www.aoa.org

New Practitioner Handbook & Practice Guide

www.aoa.org

Optometry's Career Center

OCC is a service of the American Optometric Association that helps you find practice and employment opportunities, sell practices, or find partners or employees.

(800) 365-2219 ext. 107

OCC@aoa.org

Optometry Cares – The AOA Foundation

Charitable arm for the American Optometric Association

243 North Lindbergh Boulevard

St. Louis, MO 63141

Phone: (800) 365-2219 or (314) 991-4100

Fax(314) 991-4101

www.aoafoundation.org

AOA Marketplace (Order Department)

www.aoa.org/marketplace

Phone: (800) 262-2210

OSHA Regulations Publications

www.aoa.org

Red Flags Rule

Optometry-specific Red Flags Rule Compliance Guide

www.aoa.org

Surety Bonds

Information and guidance on whether you may have an atypical business arrangement that requires a surety bond.

www.aoa.org

VISION USA

www.aoafoundation.org

Resources

American Optometric Association Foundation

Now called [Optometry Cares – The AOA Foundation](#)

American Optometric Association Political Action Committee (AOA-PAC)

(See [AOA Government Affairs Office](#))

American Optometric Foundation (AOF)

Charitable arm of the American Academy of Optometry

6110 Executive Blvd., Suite 506

Rockville, MD 20852

Phone: (301) 984-4734, ext. 3007

Fax: (301) 984-4737

www.aaopt.org

American Public Health Association (APHA)

800 “I” Street

Washington, D.C. 20001-3710

Phone: (202) 777-APHA (2742)

Fax: (202) 777-2534

comments@APHA.org

www.apha.org

Americans with Disabilities Act (ADA)

(See [United States/Americans with Disabilities Act \(ADA\)](#))

Association of Regulatory Boards of Optometry (ARBO)

(See also [COPE](#))

Suite 1630

200 South College Street

Charlotte, NC 28202

Phone: (704) 970-2710

Fax: (704) 970-2720

ARBO@arbo.org

www.arbo.org

Board Certification

(See [American Board of Optometry](#))

Career Placement

(See [AOA/Optometry's Career Center](#))

(See also [PCO/Bennett Center](#))

Resources

C&E Vision Buying Group

1015 Calle Amanecer
San Clemente, CA 92673
Phone: (800) 346-7603
Fax: (949) 361-5986
onlineservices@cevision.com
www.cevision.com

Child Abuse

(See Commonwealth of Pennsylvania, Department of Public Welfare)

CMS Form 1500

(See Owen Business Systems)

College of Optometrists in Vision Development (COVD)

243 North Lindbergh Blvd., Suite 310
St. Louis, MO 63141-7851
Phone: (314) 991-4007
Fax: (314) 991-1167
covded@aol.com
www.covd.org

Commonwealth of Pennsylvania, Department of State, State Board of Optometry

State Board of Optometry
P.O. Box 2649, Harrisburg, PA 17105-2649
Telephone: (717) 783-7155
Fax: (717) 787-7769

Bureau of Professional & Occupational Affairs

www.dos.state.pa.us/bpoa/site/default.asp

State Board of Optometry

Regulations

ST-OPTOMETRY@state.pa.us

www.portal.state.pa.us/portal/server.pt/community/state_board_of_optometry/12516

Application for a License to Practice Optometry

www.portal.state.pa.us/portal/server.pt/community/state_board_of_optometry/12516

Application for a Branch Office License

www.portal.state.pa.us/portal/server.pt/community/state_board_of_optometry/12516

Continuing Education Requirements

www.portal.state.pa.us/portal/server.pt/community/state_board_of_optometry/12516

Resources

Commonwealth of Pennsylvania, Department of Labor & Industry

Unemployment Compensation Bureau

Applications and more information about state employment tax requirements are available online:

www.dli.state.pa.us

PA/Federal Employment Posters Required

<http://www.dol.gov/oasam/boc/osdbu/sbrefa/poster/matrix.htm>

<http://www.portal.state.pa.us/portal/server.pt?open=514&objID=553565&mode=2>

Commonwealth of Pennsylvania, Department of Public Welfare

Child Abuse Telephone Reporting (Childline)

(800) 932-0313

(Must be followed within 48 hours by a written report)

Child Abuse Written Reporting

Obtain the address for mailing a written report by calling the Childline.

Commonwealth of Pennsylvania, Department of Revenue

A variety of state taxes either can or must be filed via the Internet

<https://www.etides.state.pa.us>

Sales and Use Tax

Plus additional Department of Revenue information

www.revenue.state.pa.us

Form/link for the Pennsylvania Sales Tax Exemption Certificate is: rev-1220_fillin.pdf

Application for a Sales and Use Tax License

www.doerservices.state.pa.us/BusinessTax/default.htm

The application is the PA100. Electronic payment of Sales and Use Tax can be accessed through this same link to get to e-TIDES for Business Tax Electronic Filing.

Commonwealth of Pennsylvania, Department of Transportation

Driver's License Standards

www.poaeyes.org

Commonwealth of Pennsylvania, Game Commission

Hunting Standards

www.poaeyes.org

Commonwealth of Pennsylvania, Pennsylvania e-Health Partnership Authority

www.paehealth.org

Contact Lens Rule

(See United States/FTC/Contact Lens Rule)

Resources

Council for Affordable Quality Healthcare (CAQH)

601 Pennsylvania Avenue, NW
South Building, Suite 500
Washington, DC 20004
Phone: (202) 861-1492
www.caqh.org

Council on Optometric Practitioner Education (COPE)

(See also ARBO)
4340 East West Highway, Suite 1010
Bethesda, MD 20814
Phone: (301) 913-0641
Fax: (301) 986-1150

Credit Union

(See PA Central Federal Credit Union)

Debt Collection Services

(See I.C. System)

Discover Business Services

Phone: (800) 347-6673

DMERC

(See United States/DMERC)

Driver License Standards

(See Commonwealth of Pennsylvania, Department of Transportation/Driver License Standards)

Drug Enforcement Agency (DEA)

(See United States/Drug Enforcement Agency)

Electronic Claims Service

(See POA/Electronic Claims Service)

Electronic Health Records

(See American Optometric Association/Electronic Health Records)

Electronic Prescribing

(See United States/Electronic Prescribing)

Equipment Financing Corporation

Great America Leasing Corporation

Phone: (800) 274-2641

EyeSeek

(See Vision Service Plan)

Federal Trade Commission

(See United States/Federal Trade Commission)

Fee Slips

(See Owen Business Systems)

Health Care Reform

(See American Optometric Association/Health Care Reform FAQs)

Henderson Insurance Agency

3820 Walnut Street

Harrisburg, PA 17109

Phone: (717) 652-8355 or (800) 466-3820

Fax: (717) 540-9277

www.hendersoninsuranceagency.com

Healthy Eyes Healthy People

(See American Optometric Association/Healthy Eyes Healthy People)

HIPAA

(See American Optometric Association/HIPAA Manual)

(See also United States/HIPAA Compliance)

Hunter's Vision Standards

(See Commonwealth of Pennsylvania, Game Commission)

I.C. System

Phone: (800) 443-4123

Fax: (612) 481-6411

www.icsystem.com

Insurance Coverage (Personal & Professional)

(See USI Affinity)

(See Henderson Insurance Agency)

Internal Revenue Service - IRS

(See United States/Internal Revenue Service)

www.irs.gov

LifeStyle Eyecare Centers

(See C&E Vision Buying Group)

Phone: (800) 874-3706

Medicaid/Medical Assistance

(See [United States/Center for Medicare & Medicaid Services](#))

Division of Outpatient Programs

Support Services Division

P. O. Box 8045

Harrisburg, PA 17105

To obtain a MA provider number: (800) 537-8862

Policy: (800) 932-0938

Medicare

(See [Novitas Solutions](#))

(See also [United States/Railroad](#))

(See also [United States/Center for Medicare & Medicaid Services](#))

National Board of Examiners in Optometry (NBEO)

200 South College Street, #1920

Charlotte, NC 28202

Phone: 800-969-EXAM or (704) 332-9565

Fax: (704) 332-9568

NBEO@optometry.org

www.optometry.org

National Provider Identifier (NPI)

(See [United States/National Provider Identifier Number](#))

Novitas Solutions (formerly Highmark Medicare Services)

Provider Inquiries: (877) 235-8073

<https://www.novitas-solutions.com>

Optometry' Cares - The AOA Foundation

(See [AOA/Optometry Cares – The AOA Foundation](#))

Owen Business Systems

1749 NW 27th Court

Pompano Beach, FL 33064

Phone: (800) 634-1876

Fax: 954-968-6778

PECOS

(See [United States/Provider Enrollment, Chain & Ownership System](#))

Pennsylvania Association for the Blind (PAB)

555 Gettysburg Pike

Suite A300

Mechanicsburg, PA 17055

Phone: (717) 766-2020

Fax: (717) 766-2099

info@pabind.org

www.pabind.org

Pennsylvania Central Federal Credit Union (PCFCU)

959 East Park Drive
Harrisburg, PA 17111-2894
Phone: (717) 564-4661 or (800)356-3875
Fax: (717) 564-1503
info@pacentralfcu.com
www.pacentralfcu.com

Pennsylvania Chamber of Business and Industry

417 Walnut Street
Harrisburg, PA 17101-1902
Phone: (800) 255-7224
Fax: (717) 255-3298
www.pachamber.org

Pennsylvania College of Optometry at Salus University (PCO)

8360 Old York Road
Elkins Park, PA 19027
Phone: (215) 780-1400
Fax: (215) 780-1336
www.salus.edu

The Bennett Center

Phone: (215) 780-1235
Fax: (215) 780-1353
Janice@salus.edu
www.salus.edu/alumni/alumni_bennett.html

Pennsylvania Optometric Association (POA)

218 North Street
Harrisburg, PA 17101
Phone: (717) 233-6455
Fax: (717) 233-6833
mail@poaeyes.org
www.poaeyes.org

POAeyes Post (Blog)

www.poaeyes.blogspot.com

Continuing Education

See POA website for both POA and local society events as well as contact information for local societies for events which may not be listed on the website.

Electronic Claims Service

Phone: (717) 234-2119
Fax: (717) 234-6181
Joanne@poaeyes.org

Resources

Excuse Forms

Phone: (717) 233-6455

Deb@poaeyes.org

Eye Exam Report Forms

Phone: (717) 233-6455

Deb@poaeyes.org

Kids Welcome Here®

Phone: (717) 233-6455

Kelsey@poaeyes.org

Pennsylvania Diabetic Eye Health Alliance

Phone: (717) 233-6455

Deb@poaeyes.org

Prescription Pads (spectacle, contact lens and drug)

Phone: (717) 233-6455

Deb@poaeyes.org

School Nurse Program

Phone: (717) 233-6455

Kelsey@poaeyes.org

Local Societies

Phone: (717) 233-6455

mail@poaeyes.org

www.poaeyes.org

Pennsylvania Optometric Political Action Committee (POPAC)

218 North Street

Harrisburg, PA 17101

Phone: (717) 233-6455

Fax: (717) 233-6833

mail@poaeyes.org

Paraoptometric Associations

Pennsylvania Paraoptometric Association (PPA)

www.poaeyes.org

American Optometric Association Paraoptometric Section

243 North Lindbergh Boulevard

St. Louis, MO 63141

Phone: (314) 991-4100 or (800) 365-2219

Fax: (314) 991-4101

www.aoa.org/x4859.xml

Physician Quality Reporting System (PQRS)

(See United States/Physician Quality Reporting System)

Practice Resource Center

(See [Pennsylvania Optometric Association](#))

Prescription Pads

(See [POA/Prescription Pads](#))

(See also [United States/Prescription Pads](#))

Professional Liability Insurance

(See [Henderson Insurance Agency](#))

Railroad Medicare

(See [United States/Railroad](#))

Rural Health Associations (PRHA & NRHA)

National Rural Health Association (NRHA)

Administrative Office

521 E. 63rd Street
Kansas City, MO 64110-3329
Phone: (816) 756-3140
Fax: (816) 756-3144
www.nrharural.org

Government Affairs & Policy Office

1025 Vermont Ave., NW; Suite 1100
Washington, DC 20005
202-639-0550
202-639-0559 fax

Pennsylvania Rural Health Association (PRHA)

PO Box 1632
Harrisburg, PA 17105-1632
Phone: (717) 561-5248
prha@ruralpa.org
www.ppha.org

Sales & Use Tax, Pennsylvania

(See [Commonwealth of Pennsylvania, Department of Revenue](#))

Surety Bonds

(See [United States/DMERC/Surety Bonds](#))

United States

Americans with Disabilities Act (ADA)

United State Department of Justice (800) 514-0301
www.ada.gov

Access Compliance Board (800) 872-2253
www.access-board.gov

Resources

Center for Medicare and Medicaid Services (CMS)

Medicare Provider Application Form

Obtain an application packet by calling: (877) 591-1587; or

Download forms from www.cms.hhs.gov (Click on Medicare; click on CMS Forms; on left side, click on CMS Forms)

Eligibility Tool found at the bottom of the Eligibility page on the CMS website at:

http://www.cms.gov/EHRIncentivePrograms/15_Eligibility.asp

Pre-registration Webinar at:

http://www.cms.gov/EHRIncentivePrograms/20_RegistrationandAttestation.asp

Registration and education for EHR incentive programs: <http://www.cms.gov/ehrincentiveprograms>

CMS EHR Listserv - to join the listserv:

https://service.govdelivery.com/service/subscribe.html?code=USCMS_627

Medscape Self Assessment article: <http://www.medscape.org/viewarticle/734299>

Medicaid State Launch Dates – Click on the map for information about Pennsylvania:

<http://www.cms.gov/apps/files/medicaid-HIT-sites>

Office of the National Coordinator for Health Information Technology's (ONC) Certified HIT Product

List: <http://onc-chpl.force.com/ehrcert>

DMERC

Contact the (NSC) National Supplier Clearinghouse at (866) 238-9652

Region A: National Heritage Insurance Company (pays claims): www.medicarenhic.com

Surety Bonds

www.aoa.org

[www.palmettogba.com/Palmetto/Providers.nsf/files/suretybondfaqs09102009.pdf/\\$File/suretybondfaqs09102009.pdf](http://www.palmettogba.com/Palmetto/Providers.nsf/files/suretybondfaqs09102009.pdf/$File/suretybondfaqs09102009.pdf)

www.cms.hhs.gov/MedicareProviderSupEnroll (FAQs for accreditation)

Drug Enforcement Agency (DEA)

Online forms

www.deadiversion.usdoj.gov

Online Application

www.deadiversion.usdoj.gov/drugreg/process.htm

Optometrists can also request an application from the DEA from the region in which they practice

www.deadiversion.usdoj.gov/drugreg/offices/index.html

Resources

For more information about registration and applications
www.deadiversion.usdoj.gov/drugreg/index.html

Electronic Prescribing (E-Prescribing/E-Rx)

www.allscripts.com
www.surescripts.com
www.cms.hhs.gov/ERxIncentive
www.aoa.org/HIT.xml

Federal Trade Commission (FTC)/Contact Lens Rule

www.poaeyes.org
www.aoa.org
<http://www.business.ftc.gov/documents/bus62-contact-lens-rule-guide-prescribers-and-sellers>

Federal Trade Commission (FTC)/Red Flags Rule

www.aoa.org
www.ftc.gov/redflagsrule

Federal Trade Commission (FTC)/Spectacle Prescription Release

www.poaeyes.org
www.aoa.org
FTC FACTS: The Contact Lens Rule: A Guide for Prescribers and Sellers:
www.ftc.gov/opa/2004/10/BUS62-contact.pdf

HIPAA Compliance

www.aoa.org

Internal Revenue Service (IRS)

Application for Employer Identification Number (EIN)
www.irs.gov/pub/irs-pdf/fss4.pdf
Or contact your local office for the U.S. Department of Treasury, Internal Revenue Services

National Provider Identifier Number (NPI)

National Plan & Provider Enumeration System (NPPES)

NPI Enumerator
PO Box 6059
Fargo, ND 58108
Phone: 800-465-3203 (NPI Toll-Free)
800-692-2326 (NPI TTY)
customerservice@npienumerator.com

To complete an online application, visit <https://nppes.cms.hhs.gov/NPPES/NPIRegistryHome.do>

Resources

Physician Quality Reporting System (PQRS)

www.cms.hhs.gov/PQRI/15_MeasuresCodes.asp#TopOfPage
<http://pennsylvania.aoa.org/PQRI.xml>

Prescription Pads – Tamper-resistant Information

www.cms.gov/MLN MattersArticles/downloads/SE0736.pdf
www.cms.gov/SMDL/downloads/SMD081707.pdf

Provider Enrollment, Chain & Ownership System (PECOS)

According to CMS (Centers for Medicare & Medicaid Services), physicians can use <https://pecos.cms.hhs.gov/pecos/login.do> to check whether they are in PECOS. Before using Internet-based PECOS, optometrists should read the educational material about Internet-based PECOS in the “downloads” section that is available on the CMS website at: www.cms.hhs.gov/MedicareProviderSupEnroll/04_InternetbasedPECOS.asp

RAILROAD

Provider Inquiry: (866) 899-5227
Customer Service: (877) 288-7600
www.palmettogba.com

Surety Bonds & Accreditation

(See [United States/DMERC](#))

United Parcel Service (UPS)

Phone: (800) 325-7000
Discount reference #C0000700217

USI Affinity

The Stealth Technology Center
333 Technology Drive, suite 255
Canonsburg, PA 15317
Phone: (800) 327-1550 or (724) 743-5602
Fax: (724) 873-8160
contact@usi.biz
www.usiaffinity.com

Vision Conservation Institute (VCI)

218 North Street
Harrisburg, PA 17101
Phone: (717) 233-0925
Fax: (717) 233-6833
www.poeyes.org

Vision Expo East

www.visionexpoeast.com

Resources

VISION USA

www.poaeyes.org

www.aoa.org

Vision Service Plan (VSP)

(800) 615-1883

www.vsp.com

<http://eyesseek.vsp.com/?source=POA>

VisionWebSM

Suite 300, Building 3

8601FM 2222

Austin, TX 78730

Phone: (800) 874-6601 or (512) 241-8500

customerservice@visionweb.com

www.visionweb.com

Special Thanks

The Pennsylvania Optometric Association expresses its sincere appreciation to
C&E Vision Buying Group
for sponsoring and underwriting the cost of this
Resource Guide for New Optometrists.



1015 Calle Amanecer
San Clemente, CA 92673
Phone: (800) 346-2626
Fax: (888) 418-2626
onlineservices@cevision.com
www.cevision.com

POA also expresses its thanks and acknowledgement to

California Optometric Association

American Optometric Association

Pennsylvania College of Optometry

and other affiliated organizations
for portions of the content in this guide.