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

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www.cevision.com

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- College of Optometrists in Vision Development (COVD)
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- Administrative Offices
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- American Optometric Institute (AOI)
- American Optometric Association Political Action Committee (AOA-PAC)
- American Optometric Foundation (AOF)
- American Public Health Association (APHA)
- Association of Regulatory Boards of Optometry (ARBO)
- C&E Vision Buying Group
- College of Optometrists in Vision Development (COVD)
- Commonwealth of Pennsylvania, Department of State, State Board of Optometry
- Bureau of Professional & Occupational Affairs
- State Board of Optometry
- Application for a license to practice optometry
- Application for a branch office license
- Fictitious Name Permit applications
- Continuing education requirements

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**POA has prepared this guide for new practitioners based on the most current information available. It is intended as a guide only, and doctors are encouraged to contact the various entities and organizations listed directly as well as legal and financial consultants.**
Applying for Your Pennsylvania Optometric License

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.

Checklist for Pennsylvania State Board of Optometry License Application

- **Licensure Application Packet.** Obtain a packet from the Pennsylvania State Board of Optometry.
- **NBEO Score Results.** Have the National Board of Examiners in Optometry (NBEO) submit your “Official Score Report” to the Pennsylvania State Board of Optometry. The State Board must receive evidence of passing:
  
  Parts 1, 2A and 2B, or BS (1) and CS (2)
  
  AND

  Clinical Skills/VRICS prior to 1993 or Part III/PC (3) after 1993

- **Official Transcripts.** The Pennsylvania State Board of Optometry must receive official transcripts from an accredited school or college of optometry recognized by the State Board. Transcripts must include final grades and documentation of conferring of the Doctor of Optometry degree. Contact your school admissions office to make sure they have been sent.
- **Address of Record.** Provide an address where you can be reached throughout the licensing process.
- **Photograph of Applicant.** Application must include one 2” x 2” passport, bust photograph taken within the previous six months.
- **Application Fee.** A non-refundable processing fee must be included using check or money order made payable to the “Commonwealth of Pennsylvania.” Fees are non-refundable and non-transferable. An additional processing fee will be charged for any check or money order returned unpaid by your bank, regardless of the reason. See fees section below for additional details.
- **Notice of Receipt.** Enclose a stamped, self-addressed postcard to receive a date-stamped notice of confirmation that your application has been received.
- **Practice Location(s).** Optometrists must notify the Pennsylvania State Board of Optometry of every location where they intend to practice optometry. Address changes must be submitted to the Board within 10 days of the change.
- **Completed Applications.** Submit completed application by mail to the Pennsylvania State Board of Optometry.
- **Letters of Good Standing.** Submit letters from each state licensing board where you have ever held a license to practice optometry whether the license is current or expired, active or inactive.
- **Verification of Graduation from Optometry College** (Page 3 of the application.)
Qualifications for a License to Practice Optometry

1. Graduation from an American Optometric Association approved school of optometry.
2. Passing score on the National Board Examinations
   Parts 1, 2A and 2B or BS (1) and CS (2)  
   AND  
   Clinical Skills/VRICS prior to 1993 or Part III/PC (3) after 1993

Supplemental Licenses

Branch Office License
If you intend to practice optometry as a sole proprietor in a partnership or corporate setting 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. See fees section below.

Fictitious Name Permit
If you intend to use a fictitious name in connection with your practice, you must first apply for and obtain a fictitious name permit from the Pennsylvania State Board of Optometry. See fees section below.

Pennsylvania State Board of Optometry Fees

The following is the schedule of fees for services charged by the Pennsylvania State Board of Optometry Board made payable to “Commonwealth of Pennsylvania”:

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<td>Biennial renewal—certified copy of license for each additional practice location</td>
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<td>Application for approval to conduct an educational conference</td>
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<td>Application for certification to treat glaucoma</td>
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<td>Application for name or address change</td>
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<td>Processing fee for unpaid or returned checks for any reason</td>
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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 year) basis (every two years). 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 of school of optometry. To find out exactly when you should begin to track your CE hours, contact the Pennsylvania State Board of Optometry.

Effective January 1, 2005, the Pennsylvania State Board of Optometry law requires that 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.
In today’s optometric practice environment, there are many options available for how and where you practice. The following offer some points to consider as you decide which practice setting best suits your needs the best.

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<td>Relief from practice administration</td>
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<td><strong>HMO</strong></td>
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<tr>
<td>Clinical control</td>
<td>Very expensive</td>
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<tr>
<td>Self-governance</td>
<td>Requires compliance with complex regulations</td>
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</table>

**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 monthly newsletter (Keystoner) or Web site (www.poaeyes.org)
- American Optometric Association Web site (www.aoa.org) – see Optometry’s Career Center (OCC)
- American Optometric Association classified ads in publications
- Bennett Center at Pennsylvania College of Optometry (www.pco.edu)
- 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 (www.cevision.com)
- EyeSeek, provided by Vision Service Plan for VSP network provider positions available (http://eyenseek.vsp.com/?source=POA)

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 Employed/Affiliated Optometrists. 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.

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 the 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 the 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.
## Registering as an Employer

### Federal Employer Identification Number (FEIN) or (EIN)

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

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### 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).

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### Federal/State Unemployment Compensation

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

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### 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.
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 registered provider with one or more agencies.

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)

Beginning May 23, 2007, all health care providers will be required to use a 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.

All HIPAA (Health Insurance Portability and Accountability Act) covered entities except small health plans must begin using the NPI no later than May 23, 2007; small health plans have until May 23, 2008.

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, which in Pennsylvania is Highmark Medicare Services (formerly HGSAdministrators). Your application may take several weeks to process, so it is important that you 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 your own Medicare provider registration. 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, Highmark Medicare Services (formerly HGSAdministrators).

**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 (855S) for each practitioner in the practice and submit to the National Supplier Clearinghouse (NSC). NSC will process the data and will issue a supplier number before you can submit claims to the DMERC. There are four (4) DMERC regions across the nation. Pennsylvania is in Region A.

**Applying to Provide Services to a Railroad Medicare Patient**

*Note: Railroad Medicare will not register you as a provider until you 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 number available.

Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.
To help members tackle the often complex and ever-evolving Medicare Compliance rules, the American Optometric Association, in conjunction with sponsors Marchon and OfficeMate, offers the only optometric specific Medicare Compliance Manual.

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.

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

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

CAQH Universal CredentialingDatasource (UCD)

Consider using this approach to simplify the application process for becoming credentialed to participate in insurance plans. 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.

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 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.

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.
### 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. *If you have trouble connecting to the Web sites, copy and paste the URL into your Web browser.*

- **Cole Managed Vision (subsidiary of Luxottica Group)**  
  (800) 266-2475  
  [www.colemanagedvision.com](http://www.colemanagedvision.com)

- **Davis Vision (a subsidiary of Highmark Blue Shield)**  
  (800) 999-5431  
  [www.davisvision.com](http://www.davisvision.com)

- **Doral Vision**  
  (800) 508-6780  
  [www.doralusa.com](http://www.doralusa.com)

- **Eye Care Plan of America (a subsidiary of Luxottica Group)**  
  (800) 426-5481  
  [www.ecpa.com](http://www.ecpa.com)

- **EyeMed (a subsidiary of Luxottica Group)**  
  (800) 521-3605  
  [www.eyemedvisioncare.com](http://www.eyemedvisioncare.com)

- **National Vision Administrators**  
  (888) 682-2020  
  [www.e-nva.com](http://www.e-nva.com)

- **Spectera (a subsidiary of UnitedHealth Group)**  
  [www.spectera.com](http://www.spectera.com)

- **Vision Benefits of America (VBA)**  
  (800) 432-4922  
  [www.visionbenefits.com](http://www.visionbenefits.com)

- **Vision Service Plan (VSP)**  
  (800) 615-1883  
  [www.vsp.com](http://www.vsp.com)
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. *If you have trouble connecting to the Web sites, copy and paste the URL into your Web browser.*

**The Aetna US Healthcare of Pennsylvania**  
(860) 273-0123  
[www.aetnaushc.com](http://www.aetnaushc.com)

**Blue Cross of Northeastern Pennsylvania**  
Provider Relations (800) 451-4447  
[www.bcnepa.com](http://www.bcnepa.com)

**Capital Blue Cross/Keystone Health Plan Central**  
(800) 874-8433  
[www.capbluecross.com](http://www.capbluecross.com)

**CIGNA HealthCare of Pennsylvania**  
(800) 882-4462  
[www.cigna.com](http://www.cigna.com)

**Geisinger Health Plan**  
(800) 631-1656  
[www.thehealthplan.com](http://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](http://www.healthamerica.cvty.com)

**Highmark Blue Shield and Keystone Health Plan West**  
(866) 763-3224 Option 4  
[www.highmark.com](http://www.highmark.com)

**Humana**  
(800) 448-6262 Option “Operator” or (502) 580-7938  
[www.humana.com](http://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](http://www.ibx.com/providers)
### List of Health Plans, continued

**United Healthcare**  
Provider Services: (800) 842-3210  
[www.unitedhealthcareonline.com](http://www.unitedhealthcareonline.com)

**UPMC Commercial**  
(888) 867-2756  
[www.upmchealthplan.com](http://www.upmchealthplan.com)

### 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. *If you have trouble connecting to the Web sites, copy and paste the URL into your Web browser.*

**AmeriChoice (ACPA) – covers Southeastern PA**  
Provider Relations: 800-345-3627  
[www.americhoice.com](http://www.americhoice.com)

**AmeriHealth Plan (AMHP)**  
Provider Relations: 800-521-6007  
[www.amerihealth.com](http://www.amerihealth.com)

**Gateway Health Plan (GHP)**  
Provider Services: 800-392-1145  
[www.gatewayhealthplan.com](http://www.gatewayhealthplan.com)

**Health Partners (HP)**  
Provider services: 888-991-9023  
[www.healthpartners.com](http://www.healthpartners.com)

**Keystone Mercy Health Plan (KMHP)**  
Provider services: 800-521-6007  
[www.keystonemercy.com](http://www.keystonemercy.com)

**Unison**  
Provider services: 800-600-9007  
[www.unisonhealthplan.com](http://www.unisonhealthplan.com)

**UPMC For You**  
Provider Services: (800) 286-4242  
[www.upmchealthplan.com](http://www.upmchealthplan.com)
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. If you have trouble connecting to the Web sites, copy and paste the URL into your Web browser.

**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

**Unison Health Plan**
Member Services: 1-800-290-4009
Provider Services: 1-800-600-9007

**UPMC For Life Health Plan**
Member & Provider Services: 1-800-606-8648 (providers choose option 2)
www.upmchealthplan.com

Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.
What does insurance do?
Insurance is a method of paying small, affordable premiums to protect you from larger, sometimes catastrophic financial losses. Both AOA and POA endorse insurance programs.

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.

Unfortunately, there is no way to predict when a mistake will be made, or when an accident or illness may occur. For these reasons, it is always advisable to protect yourself and your family by purchasing insurance. In addition, some insurances are required by law and 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 with. 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

Does the policy do what it should do?
• Do you have a selection of coverage limits that suit your needs?
• Who do I 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?
Insurance Coverages

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

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 your 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.
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 and IV agents. With the passage of Act 130, the DEA has determined that TPA-certified optometrists will be eligible for a mid-level practitioner DEA number beginning January 1, 2001.

**Applications**

The DEA now has certain registration applications available on their Web site, available in PDF format. An interactive form is available which allows the user to complete the form on-line and then print it on their printer. 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 and IV.
- **Section 4 (All Applicants Must Answer)**: Yes - Enter State license # (example: OEG000000); Check “N/A” on the State Controlled Substances line. Check Schedule III and IV (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**

**Do I have to have a DEA number?**
**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 that 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.
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.

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 30,000 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 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.

Unfortunately these laws can change at any moment. New laws can benefit optometry, such as the recent 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 the Web sites, e-mail, fax and the award-winning 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. They maintain libraries, printed literature, provide films, insurance programs and numerous resource materials on all facets of the profession and public relations programs.
POA is comprised of 14 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)

<table>
<thead>
<tr>
<th>Local Optometric Society</th>
<th>Counties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anthracite Optometric Society</td>
<td>Carbon, Schuylkill</td>
</tr>
<tr>
<td>Berks County Optometric Society</td>
<td>Berks</td>
</tr>
<tr>
<td>Bucks-Montgomery Optometric Society</td>
<td>Bucks, Montgomery</td>
</tr>
<tr>
<td>Central Pennsylvania Optometric Society</td>
<td>Adams, Cumberland, Dauphin, Franklin, Juniata</td>
</tr>
<tr>
<td>Chester-Delaware Optometric Society</td>
<td>Chester, Delaware</td>
</tr>
<tr>
<td>Lancaster County Optometric Society</td>
<td>Lancaster</td>
</tr>
<tr>
<td>Lehigh Valley Optometric Society</td>
<td>Lehigh, Northampton</td>
</tr>
<tr>
<td>Mid-Counties Optometric Society</td>
<td>Blair, Centre, Clearfield</td>
</tr>
<tr>
<td>Northeastern Optometric Society</td>
<td>Bradford, Columbia, Lackawanna, Luzerne, Montour</td>
</tr>
<tr>
<td>Northern Optometric Society</td>
<td>Cameron, Clinton, Elk, Lycoming</td>
</tr>
<tr>
<td>Northwestern Optometric Society</td>
<td>Clarion, Crawford, Erie, Forest, Jefferson</td>
</tr>
<tr>
<td>Philadelphia County Optometric Society</td>
<td>Philadelphia</td>
</tr>
<tr>
<td>Southwestern Optometric Society</td>
<td>Bedford, Cambria, Indiana, Cambria, Somerset</td>
</tr>
<tr>
<td>Western Pennsylvania Optometric Society</td>
<td>Allegheny, Armstrong, Beaver, Butler, Fayette</td>
</tr>
<tr>
<td>Pennsylvania Optometric Student Society</td>
<td>Pennsylvania College of Optometry</td>
</tr>
</tbody>
</table>
As a member of POA you will be entitled to many benefits. In addition to those mentioned 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
- Access to Members Only sections of POA, AOA and local society Web sites
- Member discounts at educational events
- Complimentary classified ad listings
- 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.

As soon as POA receives notice that you have received a license, 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.

Please refer to the section on Membership Categories below. All optometrists are eligible for Active membership. However, if you are not practicing in the traditional sense, 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 Web site at www.aoa.org.

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, you reduced dues gradually increasing 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

<table>
<thead>
<tr>
<th>Dues Level</th>
<th>Percent Full POA &amp; Local Society Dues</th>
<th>Percent Full AOA Dues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balance of the calendar year in which you were licensed</td>
<td>1</td>
<td>Exempt</td>
</tr>
<tr>
<td>First calendar year after licensure</td>
<td>2</td>
<td>10%</td>
</tr>
<tr>
<td>Second calendar year after licensure</td>
<td>3</td>
<td>20%</td>
</tr>
<tr>
<td>Third calendar year after licensure</td>
<td>4</td>
<td>50%</td>
</tr>
<tr>
<td>Fourth calendar year after licensure</td>
<td>5</td>
<td>75%</td>
</tr>
<tr>
<td>Fifth calendar year after licensure</td>
<td>6</td>
<td>100%</td>
</tr>
<tr>
<td>2007 Full Dues</td>
<td>POA – $635</td>
<td>Local Societies – $20-75</td>
</tr>
</tbody>
</table>

### 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 20 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 50% of Active member dues. Note: A proposed By-Laws amendment is being prepared to change the eligibility requirement for Partial Practice membership to 24 hours or less per week. Approval of this proposed amendment will also change the dues obligation for this category of membership. Consideration of this amendment will be during the POA House of Delegates meeting in June 2007.

**Special Class Member**
A doctor of optometry who is not engaged in the industrial, clinical, private or group practice of optometry and not in the federal service. (Please request Special Class Member application.) Pays full AOA dues and no POA or local society dues.

**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 full AOA and local society dues and no POA 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.
## Membership Categories, continued

### 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 no longer engaged in compensated optometrically related activities who has not been approved for life membership. This category is specifically for those individuals who are not practicing whether heading into retirement and not yet eligible for life membership, raising a family or as a result of economic situations. This is considered a temporary category of membership transitioning a member from one category to another over an extended period of time. (Please request Retired Member application.) Pays 25% of Active member dues. *Note: A proposed By-Laws amendment is being prepared to change the eligibility requirement for Retired membership to individuals 55 years of age having held a minimum 25 years of membership. Approval of this proposed amendment will also change the dues obligation for this category of membership. Consideration of this amendment will be during the POA House of Delegates meeting in June 2007.*

### Life Member
A doctor of optometry who has been a continuous member for ten or more years and is retired from practice, or who has attained the age of 75, 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. *Note: A proposed By-Laws amendment is being prepared to change the eligibility requirement for Life membership to individuals 65 years of age having held a minimum 35 years of membership. Life membership will also be considered for individuals who are permanently incapacitated. Approval of this proposed amendment will continue this category of membership with no dues obligation. Consideration of this amendment will be during the POA House of Delegates meeting in June 2007.*

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

### Special Honorary 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.
Member Communications: Keeping You Up-to-Date

Written Communications

Keystoner
POA’s monthly newsletter keeping you up-to-date on the most recent activities of the association and its advocacy efforts with government and regulatory agencies, third party payers, as well as upcoming continuing education events and practice requirements.

AOA NEWS
AOA’s bi-weekly newsletter keeping you up to date on the activities of the association on a national level and its advocacy efforts with government and regulatory agencies, third party payers, as well as upcoming continuing education events and practice requirements.

Optometry: Journal of the AOA
This monthly publication objectively presents original research studies, results of independent study, and ongoing professional commentaries by and for optometrists and other professionals in medical and optometry-related fields. It offers historical perspectives, current and topical case reports and clinical investigation, and timely and pertinent information of relevance to and for consideration and potential application by optometrists, professionals in related fields of health care, and the members of the Association. The Practice Strategies section is published to help AOA-member optometrists build successful practices, manage them more efficiently in today’s health care environment, increase their business skills, and stay up-to-date on the latest trends in the business of health care drawing on the knowledge of management experts within optometry, health care, and in other related fields, and values the diversity of opinion among them.

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

Electronic Communications

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

E-mail
POA uses e-mail to directly communicate with members, using individual correspondences as well as blasts to the entire membership. Members may choose not to receive e-mail blasts from POA (opt-out). We respect the privacy of our members and do not share e-mail addresses with anyone or any business outside of the organization.

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.

Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.
POA membership provides you with access to a multitude of programs, products and services offering special rates. Membership services includes all the activities and events provided by the individual organizations which 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**

Since 2002, POA's Practice Resource Center has held a spring education program 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 or fax to the claims submission service housed at the POA office. The information is then reviewed by the claims submission service staff, data entry is completed and 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 HCFA 1500 form is needed – simply use POA's streamlined, easy-to-understand and easy-to-complete form. If the capability to print out a HCFA 1500 is available, the claim can be printed on plain white paper in that format and sent. (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 which cause rejection and necessitate time-consuming tracking and resubmission. If the claim is rejected, the claims submission service staff provides the necessary support to the optometric office staff to help get the claim paid.
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.

If you are opening your own practice or purchasing one in which you'll be the sole provider, you'll need to secure at a minimum the following items:

- Letterhead and envelopes
- Exam forms
- Medicare forms
- CMS 1500 forms
- Fee slips
- Rx pads – spectacle, contact lens & drug
- Business cards
- Excuse forms
- Eye exam report forms
- Patient intake forms
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 3rd party billing service that helps you manage your accounts payable. You, the Eyecare Professional, 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 at the grocery store). 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.

What tips would you recommend to someone who is researching buying groups?
• Check on various billing methods
• Check for hidden fees
• Check the grace periods and late payment policies
• Ask about incentive programs and membership benefits
• 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.
C&E Vision Buying Group

C&E Vision is the buying group of choice for the Pennsylvania Optometric Association and 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.

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

VisionWeb

VisionWeb is an online service designed to streamline and simplify the ordering of ophthalmic supplies for your office from a wide selection of vendors who have a long history of providing frames and lenses to the industry. Online ordering of frames and lenses is direct to the supplier and reduces errors, minimizes ordering lag time while reducing staff time and paperwork. You can track orders online any time of day or night.

AOA member practices ordering 2,400 or more orders per year using VisionWeb will have the minimal subscription fee waived for the following year. Those ordering less than 2,400 but more than 1,200 orders per year will receive 15% off the monthly subscription fee.

Becoming a VisionWeb member automatically enrolls you in VisionWeb's BestPractices. This “elite” status makes it more rewarding to use VisionWeb by providing rebates toward high speed internet when placing 300 or more orders on VisionWeb per month.

VisionWeb also gives you the opportunity to develop a customizable Web site for your practice, and it will allow you to keep in touch with online clinical and industry news and information.

AOA is an equity affiliate of VisionWeb and will receive royalties from the transaction fees paid by participating vendors. Some of those royalties will be shared with affiliated state associations based on the number of transactions through VisionWeb by that state's members.

Maximize the return from this program by ordering your Signet Armorlite lenses and all other materials on your buying group account through VisionWeb.

VisionWeb has other services available to assist the practitioner with office procedures.

Signet Armorlite Practice Plus

Discover a new whole-office approach to enhance the practice of eyecare. The PracticePlus program, offered by Signet Armorlite, is a rewards program dedicated to the support of independent practitioners. As a member, you will receive funding, personnel training, marketing expertise, product research, continuing education, and other services to ensure patient satisfaction and promote a strong practice. PracticePlus is a way for members to manage and grow their private practice. For each and every pair of qualifying KODAK Progressive Lenses dispensed, your office will receive $10 and POA will receive $1. Signet Armorlite, a Platinum sponsor of the American Optometric Association, is dedicated to its support of optometry and the private practice at both the state and national level.
Through innovative products such as the Concise and Precise progressive lenses, as well as programs such as PracticePlus, Signet Armorlite strives to help you manage and grow your practice. Be sure to order and reorder a minimum of 10 pair every 90 days to keep your account active.

Maximize the return from this program by ordering your Signet Armorlite lenses on your C&E Vision Buying Group account through VisionWeb.

WebSystem2

POA’s newest practice enhancement program is an innovative tool that increases your patient retention, generates new-patient referrals and maximizes the return on any profit center in your practice. Websystem2’s full-color, online patient newsletter, Focus on Health, is easy to use, inexpensive and virtually automatic! Heighten reader interest by including both vision-related and general-health colorfully formatted articles including professional graphics and illustrations. Quickly add articles to your newsletter that promote specific profit centers in your practice by selecting prewritten articles from a menu or, if you prefer, write your own. The newsletter can be linked to your office Web site and any other Web sites you wish. A “custom content” feature lets you inform patients about new office hours, new staff, products and services you are offering, special promotions ... anything you want! The newsletter is fully personalized to you and your practice. From your patient’s perspective, it comes from you.

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.

Resources for Continuing Education
Pennsylvania Optometric Association – notices in Web site and Keystoner
American Optometric Association – notices Web site and publications
Local Optometric Societies
American Academy of Optometry
Pennsylvania College of Optometry

I.C. System Debt Collection Services

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

Visa, MasterCard & Discover Merchant Programs

Set your office up as a credit card merchant to accept payment for services by Visa, MasterCard or Discover.

Overnight Package Delivery by UPS

Members get a discount on overnight package delivery. Sign up to take advantage of these savings.
POA has a variety of materials available for loan including staff training materials, small pieces of equipment, books, and reference materials.

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 up to $100,000 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.
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. In Pennsylvania, this program has been underwritten by Marchon Eyewear which allows POA to provide 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 is a public health program developed by AOA to ensure that optometric eye and vision care becomes an integral part of infant wellness care to improve a child’s quality of life. Former President Jimmy and Mrs. Carter have agreed to serve as honorary spokespersons for the public service announcements promoting the InfantSEE message. Continuing education materials have been made available to the individual states and regional meetings and conferences including lectures and workshops on examination of the infant and preschoolers to help the individual optometrist become comfortable and proficient in infant vision problems, examination techniques, and treatment options.

Children’s Vision: A Guide for Teachers and School Nurses
The Pennsylvania Optometric Association has 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 Web site (http://www.poaeyes.org).

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

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. 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. The 88-slide presentation is designed for use with two projectors. (Not available as a PowerPoint program on CD.)

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 a public information program 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.

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. VCI also sponsors the Donald H. Evans, O.D., Scholarship, which provides a $1,000 check to a graduating senior from the Pennsylvania College of Optometry.

The state VCI office provides funding to VCI local areas for the implementation of public information activities.

VCI is funded by contributions from the Pennsylvania Optometric Association with monies received through member’s 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.
VISION USA

VCI, in cooperation with POA, also conducts VISION USA, 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.

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.
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

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, e-mail or Web site of the Pennsylvania Optometric Association.

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

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 the 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.

A Commonwealth of Pennsylvania Legislative Directory is available from the POA office by request. This Directory lists all legislators from Pennsylvania to both the state and national governments, and committee assignments for the Pennsylvania General Assembly.

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.
Pennsylvania Sales & Use Tax

Sales Tax in Pennsylvania is 6% on taxable items. Ophthalmic materials for the most part are not subject to Pennsylvania Sales Tax. You may or may not be required to register with the Pennsylvania Department of Revenue to collect and remit sales tax on items you sell in your office. You are not required to pay sales tax on taxable items that you purchase for resale. However, in this instance, you are required to have a sales tax license and to collect and remit sales tax on those items.

On the other hand, Use Tax is the companion tax to Sales Tax, and is owed when Sales Tax has not been charged on a taxable purchase or service. This refers to items you purchase. For example, when purchasing equipment, furniture of any other taxable items from an out-of-state business not registered to collect and remit Pennsylvania, 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.

Vendors in Philadelphia and Allegheny counties are also required to collect and remit a local sales/use tax of 1% of taxable items.

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 Web site.

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.

**Drivers’ Vision Regulations**

Pennsylvania has mandated physician reporting. Doctors are required to report patients who drive and are unable to meet unrestricted licensing standards. POA has available copies of the Department’s Physician Reporting Fact Sheet and the application for the extended restricted license. The fact sheet is also accessible through POA’s Web site.

If a practitioner can correct an individual to a binocular acuity of 20/60 or better and the patient has a visual field (extent) of at least 120 degrees, the practitioner has no reporting obligation. Motorists who cannot be corrected to meet these standards must be reported and offered the opportunity of being issued a restricted license.

**Required 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
- Federal Minimum Wage
- INS Discrimination – Department of Justice
- Employee Polygraph Notice
- Federal OSHA “It’s the Law”
- Federal Employee Rights are Protected Notice
- Family and Medical Leave Act (Required for employers with 50 or more employees)
- IRS Withholding Notice combined with IRS Earned Income Notice
- Payday Notice
- USERRA (Uniformed Services Reemployment Act)

**The state requires the posting of the following notices:**

Minimum Wage Law and Fact Sheet
Abstract of Equal Pay Law
Workers Compensation Carrier Notice
Unemployment Insurance
Child Labor Law (only required when minors are employed)
Hours of Work for Minor (only required when minors are employed)
Employment Provisions of the Pennsylvania Human Relations Act
Right-to-Know About Hazardous Substances in the Workplace (public sector)
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, tens-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 directly 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.

Medically Accepted Source for Social Security Disability and Blindness Determinations

Effective April 7, 2007, optometrist, 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.

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.
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.

**Equipment Financing**

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

**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.

**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.

**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.
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.

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 (acuities, 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, three times per year 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 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. 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 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.

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 51 boards of optometry.

**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.
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 affiliated 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;
- 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.

American Optometric Institute (AOI)

The American Optometric Association has established the American Optometric Institute (AOI), a Missouri non-profit corporation. AOI has been recognized by the IRS as a 501(c)(3) educational, scientific and charitable organization. Thus, contributions to the AOI – and its entities – are tax deductible to the extent provided by law.

AOI serves as the “umbrella” organization for the Vision Awareness Network (VAN) - formerly known as the American Foundation for Vision Awareness (AFVA), the AOA Endowment Fund and the International Library, Archives and Museum of Optometry (ILAMO).

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 protects 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 legislator 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.

Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.
**Allied Organizations**

**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.

**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 is 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 state-wide, 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.

Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.
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.

**Vision Awareness Network (VAN)**

The Vision Awareness Network, formerly known as the American Foundation for Vision Awareness, is an optometric charitable organization devoted to education about the importance of early detection and prevention of vision disorders. It partners with community groups, school administrators, healthcare professionals and parent associations to promote public awareness about the value of a lifetime of comprehensive vision care. Your contributions to support this organization are very important.

**Vision Conservation Institute (VCI)**

See Practice Enhancers Section.
POA RESOLUTION NO. Fall 81-A-2

WHEREAS, the purposes of the POA are served by the establishment of a Code of Ethics for the Association, now therefore, be it

RESOLVED that the Code of Ethics of the Pennsylvania Optometric Association shall be:

Members shall avoid selfishness in dealings with patients; and shall not suggest the purchase of services or materials unless the possible advantage of such acquisition to the patient is clearly evident.

Members shall conduct their practice so as to reflect credit upon the profession of optometry and fellow members in the Society. Members shall, in contact with lay persons, lend emphasis to the scientific aspects of optometric services.

Members, in seeking publicity, shall not utilize advertisements of a false or misleading nature.

Members shall charge fees as are consistent with services rendered.

Members shall regard the legitimate interests of fellow members and refrain from unwarranted criticism, but shall hold it their duty to condemn violations of justice to a patient, dereliction of scientific procedure, and general conduct inconsistent with a reasonable type of professional practice.

Any optometrist holding a position as a member of the State Board of Optometry or an official position in any optometric society shall consider it unethical to use such position for advertising or self-aggrandizement, and be it further

RESOLVED that in addition to the foregoing, the Code of Ethics and Standards of Conduct of the American Optometric Association shall constitute the Code of Ethics and Standards of Conduct of the Pennsylvania Optometric Association, Inc.

Adopted by
POA House of Delegates
November 1981
Hotel Hershey
Hershey, PA

Amended and reaffirmed by
POA House of Delegates
June 5, 1994
Westin William Penn
Pittsburgh, PA
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.

Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.
It Shall Be the Ideal, the Resolve, and the Duty of the Members of the American Optometric Association:

- **TO KEEP** the visual welfare of the patient uppermost at all times;

- **TO PROMOTE** in every possible way, in collaboration with this Association, better care of the visual needs of humankind;

- **TO ENHANCE** continuously their educational and technical proficiency to the end that their patients shall receive the benefits of all acknowledged improvements in visual care;

- **TO STRIVE TO SEE THAT** no person shall lack for visual care;

- **TO ADVISE** the patient whenever consultation with an optometric colleague or reference for other professional care seems advisable;

- **TO HOLD** in professional confidence all information concerning a patient and to use such data only for the benefit of the patient;

- **TO CONDUCT** themselves as exemplary citizens;

- **TO MAINTAIN** their offices and their practices in keeping with professional standards;

- **TO PROMOTE** and maintain cordial and unselfish relationships with members of their own profession and of other professions for the exchange of information to the advantage of humankind.

Adopted by the AOA House of Delegates as Substantive Motion 1 of 1944
Modified in 2005
A *mission* statement says what you do - even if you can never do all of it. A *vision* statement says where you want to go - even if you can never get there. Its purpose is to focus on where the organization is headed, not where it is.

**MISSION STATEMENT**

**OF THE**

**PENNSYLVANIA OPTOMETRIC ASSOCIATION**

The purpose of the Pennsylvania Optometric Association is

--to promote delivery of the highest quality eye/vision care by doctors of optometry

by representing optometry to state government and all other entities,

by serving as a resource on all other matters pertinent to optometry,

--and to provide professional interaction.

3/91

**VISION STATEMENT**

**OF THE**

**PENNSYLVANIA OPTOMETRIC ASSOCIATION**

The Pennsylvania Optometric Association envisions a Pennsylvania where:

--All citizens have access to high-quality eye and vision care, and are free to choose to receive that care from a Doctor of Optometry, without restriction by third-party payers or government regulations.

--Doctors of Optometry and other health care providers work together to ensure that our citizens receive the best possible eye and vision care.

--Doctors of Optometry are licensed to practice to the fullest extent of their training.

--State laws, regulations and policy are designed to attract the best practitioners in the field of optometry to the Commonwealth.

--All Doctors of Optometry participate in their professional association, in the political life of their community, state and nation; in continuing optometric education, in providing pro bono services to our less fortunate citizens, and in interprofessional relations and fellowship with their colleagues.

The Pennsylvania Optometric Association will strive to fulfill this vision to the fullest extent possible.

11/95

*Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.*
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
**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 $5.25/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 $26.00* plus typesetting, sales tax & shipping
____ Please send 10 pads Contact Lens Rx Forms at $26.00* plus typesetting, sales tax & shipping
____ Please send 10 pads Drug Rx Forms at $26.00* plus typesetting, sales tax & shipping
*Duplicate (NCR paper) form sets are available at $55.00

**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**

Name __________________________________________________________________________________________
Address __________________________________________________________________________________________
City ______________________________________________ State ____________ Zip Code ___________________
Telephone: (_____) __________________ Fax: (_____) ___________________ License No. __________________

Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.
**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 e-mail 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.

**Please type or print.**

<table>
<thead>
<tr>
<th>Date</th>
<th>Full Name</th>
<th>Male</th>
<th>Female</th>
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To protect our members' privacy, POA will not share, sell or otherwise distribute member e-mail addresses. In addition to individual association-to-member correspondence, your address will be added to POA’s members-only listserv, which includes postings from POA, local societies and individual POA members. If you do not wish to have your e-mail address added to POA’s listserv, please check here. □

**Preferred Mailing Address:**  □ Office  □ Home

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Legislators with whom you have a personal relationship

Spouse’s Name

Have you previously been affiliated with POA?  □ Yes  □ No

Have you previously been affiliated with AOA?  □ Yes  □ No  If Yes, which state?

**Mode of Practice:** (Check all that apply.)

- □ Solo Practice
- □ Partnership
- □ Group Practice
- □ Multidisciplinary

**Areas of Specialized Practice:** (Check all that apply.)

- □ Geriatric
- □ Pediatric
- □ Contact Lens
- □ Low Vision

- □ Employed by OD
- □ Employed by Physician
- □ Employed by Hospital
- □ Employed by Other:

If other, please specify:

**POA OFFICE USE**

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<th>Date Received</th>
<th>Legislative Districts (Home):</th>
<th>PA House</th>
<th>PA Senate</th>
<th>US House</th>
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<tr>
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<td>Legislative Districts (Office):</td>
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<td>PA Senate</td>
<td>US House</td>
</tr>
</tbody>
</table>

Comments:

Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.
**Partial Practice Membership Application**

Pennsylvania Optometric Association, American Optometric Association & Local Society

Please return completed application to POA, 218 North Street, Harrisburg, PA 17101. POA will forward a copy of this application to AOA and your local society. If you have any questions, please contact the POA office at (717) 233-6455 or e-mail Mail@poaes.org. For additional information, please visit [www.poaeyes.org](http://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.

Please type or print. | Date
---|---
Full Name | [ ] Male [ ] Female

Practice Name (If different from above)

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<tr>
<th>Main Office Address</th>
<th>Home Address</th>
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<td>County (Home)</td>
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<tr>
<td>Phone (Office)</td>
<td>Phone (Home)</td>
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<tr>
<td>Fax</td>
<td>E-Mail</td>
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</tbody>
</table>

To protect our members' privacy, POA will not share, sell or otherwise distribute member e-mail addresses. In addition to individual association-to-member correspondence, your address will be added to POA’s members-only listserv, which includes postings from POA, local societies and individual POA members. If you do not wish to have your e-mail address added to POA’s listserv, please check here. [ ]

Preferred Mailing Address: [ ] Office [ ] Home

Date of Birth | Year Applying for Partial Practice Membership

**POA BY-LAWS: ARTICLE II – Membership**

Section 6. Partial Practice Membership

(a) Partial Practice Membership is granted to those doctors of optometry who work in the Commonwealth of Pennsylvania for twenty (20) or fewer hours per week in compensated optometrically-related activities and whose status for partial practice is certified annually by the member;

(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 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**

<table>
<thead>
<tr>
<th>Signature of Society President or Secretary</th>
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<tr>
<td>Date</td>
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</table>

*Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.*
Sorted alphabetically by primary organization. If you have trouble connecting to the Web sites, 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 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

HIPAA Manual
www.aoa.org

InfantSEE™
www.infantsee.org

Medicare Compliance Manual
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

Order Department
Phone: (800) 262-2210

OSHA Regulations Publications
www.aoa.org

Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.
Resources

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

American Optometric Association Political Action Committee (AOA-PAC)
(See AOA Government Affairs Office)

American Optometric Foundation (AOF)
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

Association of Regulatory Boards of Optometry (ARBO)
(See also COPE)
Suite 503
1750 South Brentwood Boulevard
St. Louis, MO 63144
Phone: (314) 785-6000
Fax: (314) 785-6002
ARBO@arbo.org
www.arbo.org

C&E Vision Buying Group
1015 Calle Amanecer
San Clemente, CA 92673
Phone: (800) 346-7603
Fax: (949) 361-5986
info@cevision.com
www.cevision.com

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

Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.
Resources

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.dos.state.pa.us/bpoa/cwp/view.asp?a=1104&q=432911

Application for a license to practice optometry
www.dos.state.pa.us/bpoa/lib/bpoa/20/opto_board/opto_license_app.pdf

Application for a branch office license
www.dos.state.pa.us/bpoa/lib/bpoa/20/opto_board/opto_branch_app0304.pdf

Fictitious Name Permit applications
www.dos.state.pa.us/corps/lib/corps/20/7/311.pdf

Continuing education requirements
www.dos.state.pa.us/bpoa/lib/bpoa/20/opto_board/opto_c.e.info_letter_ii.pdf

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
State Required Posters
www.dli.state.pa.us

State & Federal Required Posters
www.pachamber.org/cp/publications/details.asp?ID=144

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.

Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.
Commonwealth of Pennsylvania, Department of Revenue
A variety of state taxes either can or must be filed via the internet
www.etides.state.pa.us

Sales and Use Tax
Plus additional Department of Revenue information
www.revenue.state.pa.us

Commonwealth of Pennsylvania, Department of Transportation
Driver License Standards
www.poaeyes.org

Hunting Standards
www.poaeyes.org

Contact Lens Rule
(See United States/Contact Lens Rule)

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

Discover Business Services
(800) 347-6673

DMERC
(See United States/DMERC)

Drug Enforcement Agency (DEA)
(See United States/Drug Enforcement Agency)

Federal Trade Commission
(See United States/Federal Trade Commission)

Henderson Insurance Agency
3820 Walnut Street
Harrisburg, PA 17109
Phone: (717) 652-8355 or (800) 466-3820
Fax: (717) 540-9277
www.hendersoninsuranceagency.com

Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.
Resources

**Highmark Medicare Services (formerly HGSAdministrators)**
Provider Line: (866) 488-0549
www.highmarkmedicareservices.com

**HIPAA**
(See American Optometric Association/HIPAA Manual)
(See also United States/HIPAA Compliance)

**I.C. System**
Phone: (800) 443-4123
Fax: (612) 481-6411
www.icsystem.com

**Internal Revenue Service - IRS**
(See also United States/Internal Revenue Service)
www.irs.gov

**Medicaid/Medical Assistance**
(See also United States/Centers 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 Highmark Medical Services)
(See also United States/Railroad)
(See also United States/Centers 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)

**Owen Business Systems**
1749 NW 27th Court
Pompano Beach, FL 33064
Phone: (800) 634-1876
Fax: 954-968-6778

*Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.*
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 (PCO)
8360 Old York Road
Elkins Park, PA 19027
Phone: (215) 780-1400
Fax: (215) 780-1336
www.pco.edu

Bennett Center
Phone: (215) 780-1235
Fax: (215) 780-1353
Janice@pco.edu
www.pco.edu/college/placement_bennett.htm

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

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

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

Excuse Forms
Phone: (717) 233-6455
Joyce@poaeyes.org

Resources

Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.
Eye Exam Report Forms
Phone: (717) 233-6455
Joyce@poaeyes.org

Kids Welcome Here®
Phone: (717) 233-6455
Deb@poaeyes.org

Loaner Library
Phone: (717) 233-6455
Joyce@poaeyes.org

Rx Pads (spectacle, contact lens and drug)
Phone: (717) 233-6455
Joyce@poaeyes.org

School Nurse Program
Phone: (717) 233-6455
Deb@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

Railroad Medicare
(See United States/Railroad)
Resources

Rural Health Associations (PRHA & NRHA)
National Rural Health Association (NRHA)
Administrative Office
Suite 203
One West Armour Boulevard
Kansas City, MO 64111-2087
Phone: (816) 756-3140
Fax: (816) 756-3144
www.nrharural.org

Government Affairs & Policy Office
1600 Prince Street, Suite 100
Alexandria, VA 22314-2836
Phone: (703) 519-7910
Fax: (703) 519-3865

Pennsylvania Rural Health Association (PRHA)
PO Box 1632
Harrisburg, PA 17105-1632
Phone: (717) 561-5248
prha@ruralpa.org
www.porh.cas.psu.edu/prhaweb/prhahome.htm

Popular Leasing USA, Inc
Phone: (800) 365-3992
www.popularleasingusa.com

Signet Armorlite PracticePlus™
1001 Armorlite Drive
San Marcos, CA 92069
Phone: (800) 950-5367
Fax: (800) 759-0660
www.signetarmorlite.com

United States
Internal Revenue Service (IRS)
Application for Employer Identification Number (EIN)
Or contact your local office for the U.S. Department of Treasury, Internal Revenue Services

Federal Trade Commission (FTC)/Spectacle Prescription Release
www.poaeys.org
Or www.aoa.org
Also visit the Federal Trade Commission Web site

Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.
Resources

Federal Trade Commission (FTC)/Contact Lens Rule
www.poaeyes.org
www.aoa.org
Also visit the Federal Trade Commission Web site

Center for Medicare and Medicaid Services (CMS)
Medicare Provider Application Form
Obtain an application packet by calling: (877) 591-1587; or,
Download forms from http://cms.hhs.gov/providers/enrollment/default.asp (click on Application Forms & Instructions)

HIPAA Compliance
www.poaeyes.org
www.aoa.org

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
For background on the NPI initiative and an extensive discussion on implementation, visit https://nppes.cms.hhs.gov/MLNMattersArticles

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

DMERC
Contact the (NSC) National Supplier Clearinghouse at (866) 238-9652
Region A: Tricenturion (sets policy): www.tricenturion.com

Drug Enforcement Agency (DEA)
On-line forms
www.deadiversion.usdoj.gov/online_forms.htm
On-line Application
www.deadiversion.usdoj.gov/drugreg/process.htm

Please see the Resources Section at the end of this document for an alphabetical listing of all contact information.
Optometrists can also request an application from the DEA from the region in which they practice [www.deadiversion.usdoj.gov/drugreg/offices/index.html](http://www.deadiversion.usdoj.gov/drugreg/offices/index.html)

For more information about registration and applications [www.deadiversion.usdoj.gov/durgreg/index.htm](http://www.deadiversion.usdoj.gov/durgreg/index.htm)

**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.colburn.com](http://www.colburn.com)

**Visa/MasterCard – Bank of America Merchant Services**
Phone: (877) 695-2472

**Vision Awareness Network (VAN)**
Phone: (800) 927-2382
[www.aoa.org](http://www.aoa.org)

**Vision Conservation Institute (VCI)**
218 North Street
Harrisburg, PA 17101
Phone: (717) 233-0925
Fax: (717) 233-6833
[www.poaeyes.org](http://www.poaeyes.org)

**VISION USA**
[www.poaeyes.org](http://www.poaeyes.org)
[www.aoa.org](http://www.aoa.org)

**Vision Service Plan (VSP)**
(800) 615-1883
[www.vsp.com](http://www.vsp.com)

**VisionWeb**
Suite 300, Building 3
8601FM 2222
Austin, TX 78730
Phone: (800) 874-6601 or (512) 241-8500
customerservice@visionweb.com
[www.visionweb.com](http://www.visionweb.com)
Websystem2
P. O. Box 1418
Placerville, CA  95667
Michael Arnell, O.D.
Phone: (530) 672-2892
Fax: (530) 676-2403
drarnell@websystem2.com
www.websystem2.com
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1015 Calle Amanecer
San Clemente, CA 92673
Phone: (800) 346-2626
Fax: (888) 418-2626
info@cevision.com
www.cevision.com

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