Completing Annual Professional Portfolio Requirements

College of Opticians of Ontario

This document is a walk-through from start to finish on how to complete your annual Professional Portfolio Requirements through the Registrant Portal. Each of the categories below is required to be completed on an annual basis (except for Jurisprudence Chapter 1 being every 3 years). The annual Professional Portfolio consists of:

1. Competency Self-Assessment
2. Continuing Education/Professional Development (Accredited and Unaccredited Hours)
3. Jurisprudence Chapter 1 Module

Continuing Education/Professional Development

As part of the portfolio, registrants must complete a combined total of **16** continuing education (CE) hours to include:

- a. 4 accredited hours specific to eyeglass (EG) technology
- b. 4 accredited hours specific to contact lens (CL) technology
- c. 4 accredited hours specific to professional growth (PG)
- d. 4 non-accredited self-directed continuing education hours

** ROs who have refracting designation are also required to complete 2 accredited CE hours specific to Refraction (RF).

NEW RO Requirements

- The number of CE hours that newly registered ROs must complete will depend on the date you registered with the College. An overview of the CE requirements for new registrants may be found here.

Table 1 Pro-Rated CE Requirements

Date Registered	Accredited CE Required	Unaccredited CE required
January 1 – March 31	**12** (100%) (4 EG + 4 CL + 4 PG)	**4** (100%)
April 1 – June 30	**9** (75%) (3 EG + 3 CL + 3 PG)	**3** (75%)
July 1 – September 30	**6** (50%) (2 EG + 2 CL + 2PG)	**2** (50%)
October 1 – December 31	**3** (25%) (1 EG + 1 CL +1 PG)	**1** (25%)

Useful links:

Professional Portfolio Guide

A comprehensive guide on how to complete each section of your Professional Portfolio can be found here.

Accredited Continuing Education (CE) Activities

Prior to uploading your CE hours, registrants should ensure which CE hours are valid and for how long before acquiring those hours. A complete list of the College's accredited CE activities can be found here.

All registrants must complete all components of their Professional Portfolio (Accredited Activities, Non-accredited/Self-directed hours, and the Competency Self-Assessment) in the Quality Assurance section of their Registrant Portal.

1. Registrant Portal

About Me (First Page on Portal Screen)

** In the Personal Details section of your Portal you will enter contact as well as employment information. It is your responsibility to ensure that this information is updated.

- To access your Professional Portfolio, select **"Quality Assurance"** in your Registrant Portal in the ribbon located at the top of the webpage.

2. Competency Self-assessment

Professional Portfolio

To assist Registered Opticians (RO's) in meeting their legislative obligations under the *Regulated Health Professionals Act, 1991,* the Quality Assurance (QA) Committee has developed a QA program that requires registrants to engage in self-assessment and professional development each year. Maintaining a professional portfolio is a mandatory requirement of QA Competency Enhancement. The Professional Portfolio is designed to support registrants in consciously engaging in continuing education and professional development.

Each section (tab) of the Professional Portfolio must be completed on an annual basis.
Jurisprudence Chapter One: Professional Boundaries and Sexual Abuse Prevention must be successfully completed within 12 months of registration and then once every three years.

| Competency Self-Assessment | Accredited Hours | Non-Accredited/Self-Directed Hours | Jurisprudence |

Competency Self Assessment

The College requires that all registered opticians participate in Self Assessment. It is recommended that you complete the Competency Self Assessment in January of each year. You will be able to review and edit this form throughout the year, **however, once you *submit* the form, it cannot be edited.**

As self-regulated professionals, opticians are expected to become proficient in self-assessment. The Competency Self Assessment form is based on the National Competencies for Canadian Opticians. Engaging in the self-assessment process helps you consider what learning activities you should participate in for the coming year.

Tips for Completing the Competency Self Assessment are available in the Portfolio Guide and Help Videos on our website.

Year: [2022 ▾]   **Start Self Assessment**

- Your Self-Assessment **MUST** be completed every year.
- At the end of each page of questions, it is critical to click "Save & Proceed' to save your progress.
- You cannot proceed if you do not select an answer

a) I communicate verbal messages effectively at an appropriate rate and using a thoughtful choice of words to meet individual needs.[1]

Required Field

If you wish to change your responses throughout the year, please do not submit, please click on "**Save & Return**" to go back to Registrant Portal. Once you hit "**Submit**" your responses cannot be changed.

Ensure this box is checked before you select "Submit."

Remember

[23] Standard 4
[24] Standard 4, Entry to practice competencies
[25] Contact Lens Mentor policy, Infection Control – Optician's Edition
[26] Entry to practice competencies

Previous   Save & Return   Submit

- Remember to click the validation checkbox for completion. Otherwise, it will not reflect in your portal that the self—assessment is complete.

- It is best practice to complete your self-assessment in January so that it is valid for the entire year. It is an opportunity to reflect on the types of learning and skills you want to focus on in the upcoming year. The self-assessment only takes 5 minutes to complete.
- Once completed it is only valid for the year you completed it in.

Continuing Education/Professional Development

3. Accredited CE Hours

- The Professional Portfolio dashboard provides you with a list of all your CE accredited activities. It displays how many hours you have earned and how many hours you have left to complete your requirements.
- A comprehensive guide on how to complete each section of your Professional Portfolio is found here.

Professional Portfolio

To assist Registered Opticians (RO's) in meeting their legislative obligations under the *Regulated Health Professionals Act, 1991*, the Quality Assurance (QA) Committee has developed a QA program that requires registrants to engage in self-assessment and professional development each year.
Maintaining a professional portfolio is a mandatory requirement of QA Competency Enhancement. The Professional Portfolio is designed to support registrants in consciously engaging in continuing education and professional development.

Each section (tab) of the Professional Portfolio must be completed on an annual basis.
Jurisprudence Chapter One: Professional Boundaries and Sexual Abuse Prevention must be successfully completed within 12 months of registration and then once every three years.

| Competency Self-Assessment | Accredited Hours | Non-Accredited/Self-Directed Hours | Jurisprudence |

Accredited Continuing Education Hours
The accredited continuing education (CE) activities you complete in order to fulfill your annual accredited CE requirements are recorded here. You must record the date of the activity and upload your completion certificate here.

Accredited CE Requirements are:

- 4 Accredited Contact Lens hours
- 4 Accredited Eyeglass Hours
- 4 Accredited Professional Growth Hours

**Only opticians with refracting status are required to complete the additional 2 accredited CE hours pertaining to refraction (RF).
**For the Year 2020, Registrants have the option of completing any combination of Self-Directed and Accredited Professional Growth hours totaling 8.

Year: 2022 ⌄

Date Completed	CE Activity Name	Accreditation Number	Date Certificate Uploaded	Number of Hours	Earned
Eyeglass:					Hours Earned: 0 of 4
Contact Lens:					Hours Earned: 0 of 4
Professional Growth:					Hours Earned: 0 of 4
Refraction (RF):					Hours Earned: 0 of 2

Step 2: Upload Certificate of Completion of CE course

Upload Certificate / Update Category   Add New Course

Step 1: Add New Course

- To enter your CE activities, go to your Professional Portfolio in the registrant portal and select "Accredited Activities."
- You can view your completed and/or outstanding CE requirements by selecting the respective year.
- Ensure the correct year is selected above the CE table before proceeding to upload acquired CE.
- To add a new CE hour, click "Add New Course."

- Enter the accreditation number in the field and click "Find"

- The CE Activity appears and if it is the correct activity, click "Select."

College of
Opticians
of Ontario

On Behalf Of: (select)

SEARCH FOR COURSE

*Select CE year   `2022 ▾`

Accreditation Number
Contains   `3825`

`Find`

Accreditation number	CE Activity	Provider	CE Hours	CE Category	Accreditation Date	Expiration Date	
3825	Quarantine Vision	AOE	1	CL,EG,RF	08/13/2020	08/13/2023	`Select`

Sonic Forms Admin Panel	Version 3.0.21B

Accreditation Number

`Quarantine Vision (3825)                                            ▾`

CE Activity   `Quarantine Vision`

CE Provider   `Academy of Ophthalmic Education (AOE) ▾`

CE hours   `1`

CE Category   `Eye Glass    ▾`   Select CE Category

Date Completed   `           📅`   Enter date of completion

`Back/Cancel`   `Save/Upload Certificate`   `Save & Return`

- Go to the CE Category drop-down menu and select the category. If there is more than one option in the drop-down menu for a CE Category I.e., EG, CL, PG – you ONLY select the category you want this activity to be counted towards.
- Enter the date you completed the CE activity.

College of
Opticians
of Ontario

On Behalf Of: (select)

SEARCH FOR COURSE

*Select CE year   2022 ⌄

Accreditation Number
Contains   3825

Find

Accreditation number	CE Activity	Provider	CE Hours	CE Category	Accreditation Date	Expiration Date	
3825	Quarantine Vision	AOE	1	CL,EG,RF	08/13/2020	08/13/2023	Select

Sonic Forms Admin Panel   Version 3.0.21B

Accreditation Number

Quarantine Vision (3825)   ⌄

CE Activity   Quarantine Vision

CE Provider   Academy of Ophthalmic Education (AOE) ⌄

CE hours   1

CE Category   Eye Glass   ⌄

Date Completed   01/03/2022   📅

Back/Cancel   Save/Upload Certificate   Save & Return

Upload your certificate of
completion immediately

You may save your entry
and upload the certificate
of completion at a later
date

- You may either upload your certificate of completion (which is your proof of completion) at this point or you can upload it another time (e.g. If you are waiting to receive the certificate from the CE Provider)

Uploading Certificates of Completion

Helpful Hint: Save the Certificates of Completion in a folder where you can access them easily to upload to your portal. Ensure that you are uploading CE hours on the same device which the certificates are saved to. Best practice is to label the certificate of completion by the CE Accreditation Activity number. For example, the label for the certificate of completion for Accreditation Activity 3671 would be 3671.pdf

Helpful Hint: Certificates of Completion that list several accreditation activities should be saved more than once. For example, if your certificate of completion contains a total of 3 hours for EG, CL, PG each with its own accreditation activity number you should save this document three times. You should have one file each for EG, CL, PG each labelled with its own accreditation activity number to be uploaded.

Figure 1 - Certificates of Completion Saved in Folder on Desktop

> ****Keep in mind, it is _your_ responsibility to obtain all Certificates of Completion from the Provider of the CE activity.**

- To upload your certificate, select "Choose File."
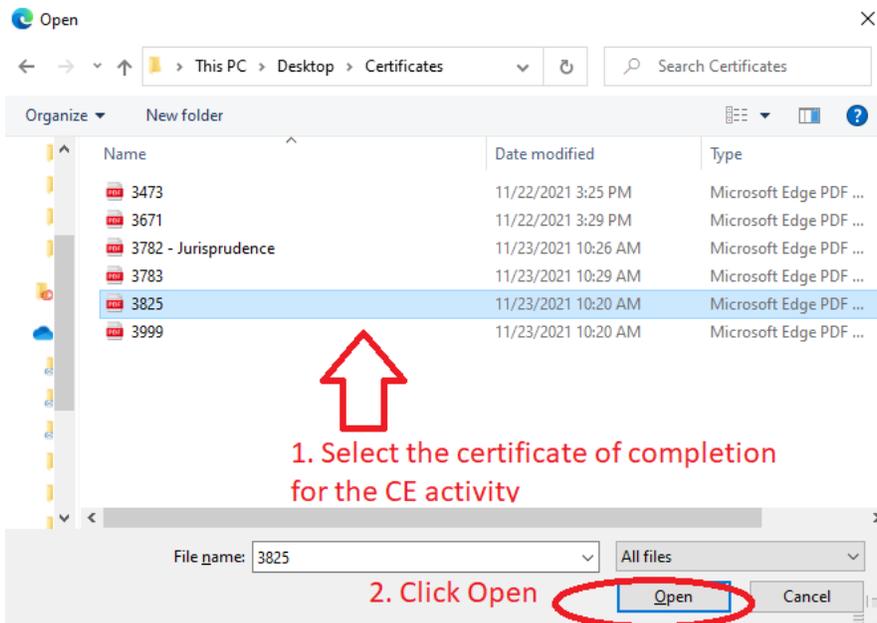
- A new file directory window will pop-up for you to locate where you placed your certificate file folder.
- Once you have located your file, select it and click "Open."

- Ensure that the correct certificate has been selected, then click "Upload."
- You **must** provide a certificate of completion with every accredited CE activity. CE hours with missing certificates will be considered **incomplete.**
- Select "Save & Return" and you will be brought back to the Professional Portfolio dashboard where you can view the number of CE hours earned and the hours left to complete your CE requirements.

Professional Portfolio

To assist Registered Opticians (RO's) in meeting their legislative obligations under the *Regulated Health Professionals Act, 1991*, the Quality Assurance (QA) Committee has developed a QA program that requires registrants to engage in self-assessment and professional development each year.
Maintaining a professional portfolio is a mandatory requirement of QA Competency Enhancement. The Professional Portfolio is designed to support registrants in consciously engaging in continuing education and professional development.

Each section (tab) of the Professional Portfolio must be completed on an annual basis.
Jurisprudence Chapter One: Professional Boundaries and Sexual Abuse Prevention must be successfully completed within 12 months of registration and then once every three years.

Competency Self-Assessment	Accredited Hours	Non-Accredited/Self-Directed Hours	Jurisprudence

Accredited Continuing Education Hours
The accredited continuing education (CE) activities you complete in order to fulfill your annual accredited CE requirements are recorded here. You must record the date of the activity and upload your completion certificate here.

Accredited CE Requirements are:

- 4 Accredited Contact Lens hours
- 4 Accredited Eyeglass Hours
- 4 Accredited Professional Growth Hours

**Only opticians with refracting status are required to complete the additional 2 accredited CE hours pertaining to refraction (RF).
**For the Year 2020, Registrants have the option of completing any combination of Self-Directed and Accredited Professional Growth hours totaling 8.

Year: 2022 ▼

Date Completed	CE Activity Name	Accreditation Number	Date Certificate Uploaded	Number of Hours	Earned
Eyeglass:					**Hours Earned: 1 of 4**
2022-01-03	Quarantine Vision	3825	2022-01-10	1	
Contact Lens:					**Hours Earned: 0 of 4**
Professional Growth:					**Hours Earned: 0 of 4**
Refraction (RF):					**Hours Earned: 0 of 2**

Upload Certificate / Update Category   Add New Course

- Your Professional Portfolio dashboard gets updated every time you enter a CE Activity

4. **Non-Accredited/Self-Directed Hours**

- 4 hours required annually
- You can use any excess accredited hours or Jurisprudence (chapter 2-5) towards your SD hours
- No certificate upload required
- No matter the hour (SD or Accredited), they cannot be transferred between years

    o   Example: You cannot use a 2021 CE hour to complete the requirements for 2020.

Year	2022
Time Spent	1 hour
Date Completed	01/03/2022
Activity and/or Resource material used	Required Field
Summarize new knowledge and/or skills gained and the effect on your practice	Required Field

Back/Cancel   Save & Return

- All the fields must be filled out completely to proceed, otherwise a message stating, "Required Field" will pop-up next to the empty entities (an example of that is above).

Year	2022
Time Spent	1 hour
Date Completed	01/03/2022
Activity and/or Resource material used	First Aid/CPR Training
Summarize new knowledge and/or skills gained and the effect on your practice	I learned how to safely correctly administer First Aid in the event a patient were to faint during a contact lens fitting. This is critical in ensuring the safety of our patients until the Paramedics arrive on scene.

Back/Cancel   Save & Return

Professional Portfolio

To assist Registered Opticians (RO's) in meeting their legislative obligations under the *Regulated Health Professionals Act, 1991*, the Quality Assurance (QA) Committee has developed a QA program that requires registrants to engage in self-assessment and professional development each year.

Maintaining a professional portfolio is a mandatory requirement of QA Competency Enhancement. The Professional Portfolio is designed to support registrants in consciously engaging in continuing education and professional development.

Each section (tab) of the Professional Portfolio must be completed on an annual basis.

Jurisprudence Chapter One: Professional Boundaries and Sexual Abuse Prevention must be successfully completed within 12 months of registration and then once every three years.

| Competency Self-Assessment | Accredited Hours | Non-Accredited/Self-Directed Hours | Jurisprudence |

Professional Improvement Plan

This is where you record your unaccredited, self-directed continuing education hours. Please record the activities you have worked on throughout the year including the date, amount of time spent on each activity, resources used and summarize new knowledge and/or skills gained and the effect on your practice.

Examples of self-directed activities are available in the Portfolio Guide and Help Videos on our website.

Opticians are required to complete 4 self-directed hours annually.

Year   [2022 ⌄]

Year	Date/Duration of Activity	Activity and/or Resource material used	Summary of knowledge gained	
2022	1 hour	First Aid/CPR Training	I learned how to safely correctly administer First Aid in the event a patient were to faint during a contact lens fitting. This is critical in ensuring the safety of our patients until the Paramedics arrive on scene.	View/Update

[Add Activity]

- Once completed click, "Save and Return". You will be redirected to the main page of the portal and will see the SD hour has successfully been recorded.
- The process can be repeated by clicking, "Add activity for YEAR" (the green bottom at the bottom left of the screen)

5. Jurisprudence

There are 5 chapters in the College's Jurisprudence Tool. The purpose of the Tool is help ROs acquire knowledge about the law, standards, and guidelines that affect Opticianry in Ontario. Keep in mind the following regarding Jurisprudence:

- o Jurisprudence *Chapter 1: Professional Boundaries and Sexual Abuse Prevention* is **mandatory.** It must be completed within 12 months of registration and then once every three years.
- o Jurisprudence Chapter 2-5 is *optional* and can be used as 1 SD or 1 PG hour for the year in which they were acquired. You can only complete these chapters once every three years.
- o A test must be completed for each chapter.

Professional Portfolio

To assist Registered Opticians (RO's) in meeting their legislative obligations under the *Regulated Health Professionals Act, 1991*, the Quality Assurance (QA) Committee has developed a QA program that requires registrants to engage in self-assessment and professional development each year.

Maintaining a professional portfolio is a mandatory requirement of QA Competency Enhancement. The Professional Portfolio is designed to support registrants in consciously engaging in continuing education and professional development.

Each section (tab) of the Professional Portfolio must be completed on an annual basis.

Jurisprudence Chapter One: Professional Boundaries and Sexual Abuse Prevention must be successfully completed within 12 months of registration and then once every three years.

Competency Self-Assessment	Accredited Hours	Non-Accredited/Self-Directed Hours	**Jurisprudence**

Jurisprudence

You are required to successfully complete *Jurisprudence Chapter One: Professional Boundaries and Sexual Abuse Prevention* within 12 months of initial registration and then once every 3 years.

Optional Jurisprudence Chapters are available and can be completed once every 3 years.

Please ensure you read the handbook thoroughly before attempting any test.

All Jurisprudence Chapters are accredited Professional Growth (PG) activities. Upon successful completion, you will be able to download a completion certificate and report the activity in the Accredited Hours tab.

To access to Jurisprudence Tool

[Go to COO Jurisprudence Tool]   [Go to COO Jurisprudence Handbook]

Jurisprudence Resources

[Jurisprudence Handbook (chapters 1-4)]   [Jurisprudence Video (chapter 5)]

COO Tests Dashboard

Test Name	Status	
Mandatory - Professional Boundaries and Sexual Abuse Prevention Test	Complete	Download Certificate
Optional - Record Keeping, Confidentiality and Privacy Test	Incomplete	Start Test
Optional - Chapter 3 - Communications	Complete	Download Certificate
Optional - Chapter 4: Introduction to the RHPA	Incomplete	Start Test
Optional - Chapter 5: Diversity, Equity and Inclusion	Incomplete	Start Test

Previous Attempts

Test Name	Status	Date	
Mandatory - Professional Boundaries and Sexual Abuse Prevention Test	Passed	2021-11-15	View Results
Optional - Chapter 3 - Communications	Passed	2021-11-12	View Results

- The COO Tests Dashboard provides you with the status of your Jurisprudence Chapters. You will be able determine if you have completed a Chapter. The term "complete" means that you passed the prerequisite test of the Chapter.   Chapters that have not been completed or you failed the test will be marked as "incomplete."
- You have unlimited attempts to complete the Chapters and must achieve a minimum passing mark of 80%.
- Click here for instruction on completing the Jurisprudence Tool.

QA Portfolio Related Fees

Late Professional Portfolio Fee	$50.00	$6.50	$56.50
Deficient Professional Portfolio Fee	$100.00	$13.00	$113.00
Peer and Practice Assessment Fee	$850.00	$110.50	$960.50

- Late Professional Portfolio Fee: each year the RO's that are selected to participate in the CRE process are given a deadline when to upload their professional portfolio documents by. This fee is only applied to the individuals who miss the deadline.
- Deficient Professional Portfolio Fee: This fee is applied to RO's who are missing accredited CE hours.
- Peer and Practice Assessment (PPA) Fee: Non-compliant RO's who are selected to participate in the PPA process are obligated to pay this fee.