

# **THE SECTION ON CORNEA, CONTACT LENSES, AND REFRACTIVE TECHNOLOGIES**

## **AMERICAN ACADEMY OF OPTOMETRY**

*“Fostering professional growth and advocating excellence in patient care through leadership in education and research.”*

### **OPERATIONS MANUAL**

**Revised March 11, 2021**

#### **About our organization:**

The Section on Cornea, Contact Lenses and Refractive Technologies of the American Academy of Optometry (hereafter referred to as the “Section”) are those Fellows in the American Academy of Optometry who have expressed particular interest in the field of cornea, contact lenses, and refractive technologies, and have elected to be members in this Section.

Diplomates of the Section are those Section members who have successfully completed the examination process administered by the Section, and have been granted Diplomate status by the Board of Directors of the Academy. The steps and procedures for attaining Diplomate status are described in detail in the Section’s Candidate Guides (see Appendix 1 for location).

The Section on Cornea, Contact Lenses and Refractive Technologies operates under the bylaws of the Section (Appendix 2) as well as the bylaws of the American Academy of Optometry, and such directives of its Board of Directors as they may apply. In any instance where the items in this manual conflict with section bylaws and/or Academy policies and/or bylaws, it shall be assumed that Academy policy will take first precedence and section bylaws will be considered next.

#### **About this Operations Manual:**

This Operations Manual of the Section shall be modified and updated every two years as outlined below in Section IV-B-5 and IV-C-2. All modifications/updates shall be brought to the Executive Committee (EC) for approval. Interim modifications can be brought to the EC by any of its members at any time. All modifications require a 2/3 majority of the EC.

## I. RESPONSIBILITIES - The responsibilities of the Section are to:

- A. Serve at the appointment of and under the directives of the Board of Directors of the Academy.
- B. Adhere to and promote the official policies of the American Academy of Optometry.
- C. Provide timely updates to the Academy on advances in the area of cornea, contact lenses, and refractive technologies.
- D. Assist the Academy in providing assistance to its members and the profession by:
  1. Identifying and formulating positions on critical issues facing the profession in the area of cornea, contact lenses, and refractive technologies.
  2. Developing a timely internal mechanism for responding to critical issues that may surface from within the public sphere.
  3. Coordinating the Section response to critical issues with the Communications Committee and the Academy office.
  4. Encouraging and fostering research development in the area of cornea, contact lenses, and refractive technologies.
- E. Plan Annual Meeting symposium topics which will be submitted to the Annual Meeting Program Committee.
- F. Act as the agent of the Board of Directors in interviewing, testing and examining candidates for the Diplomate in Cornea, Contact Lenses and Refractive Technologies, nominating successful candidates to the Board of Directors to be awarded this Diplomate.
- G. Provide a mechanism by which Academy Fellows who are Section Diplomates will speak, teach, write, advise and otherwise provide leadership in the fields of cornea, contact lenses, and refractive technologies.
- H. Allocate time, at its annual business meeting, to the members of the Section to discuss membership needs of both the Section and the Academy.

## II. MEMBERSHIP AND OFFICES

- A. Any Academy member may become a member of the Section by so stating his or her intention, and paying annual dues (to be determined by Academy policy).
- B. Fellows or candidates for fellowship may not claim any special status, nor hold themselves out as having special qualifications, simply by virtue of their membership in the Section. Reference to Academy sections by Fellows or candidates in promotional or professional materials in a manner that implies increased qualifications or credentials are a privilege reserved for Diplomates or Distinguished Fellows.
- C. The Section shall have a leadership structure in which there is a rotation of individuals who hold office with a term limit of one (1) two-year term for each elected position [as per current bylaws].

- D. The presentation of a slate of officers by the Nominating Committee and the process and procedure of election will take place at the Section Business Meeting in keeping with the specifications of the Section Bylaws.
- E. Only Diplomates or Distinguished Fellows shall be eligible to vote and hold office.
- F. The officers of the Section include the Chair, the Vice-Chair, the Secretary/Treasurer and the immediate Past Chair. Their terms of office are specified in the section bylaws.
- G. The Executive Committee (EC) of the section will include the officers and the Chair of the Diplomat Award Committee and the Chair of the Program/Education Committee (as per section bylaws).
- H. The “work” of the section will be accomplished through committees/teams. Section members who desire to be involved in section programs and projects will be organized into committees. These committees will report to the EC and in most cases be chaired by an EC member.
- I. A listing of the current leadership roster is attached to this OM (Appendix 3).

### III. DIPLOMATE/DISTINGUISHED FELLOW PROGRAMS

- A. Diplomat/Distinguished Fellow programs shall state in writing every aspect of the protocol or process that a candidate must follow to achieve Diplomat/Distinguished Fellow status for all categories. A similar document should be developed for Diplomat/Distinguished Fellow renewal.
- B. All Diplomat/Distinguished Fellow programs should only use the terminology clinical, research, inactive or retired for categories of Diplomates/Distinguished Fellows.

### IV. THE OFFICERS/EXECUTIVE COMMITTEE

- A. The Chair of the Section shall:
  - 1. Preside at meetings of the officers, the Executive Committee and the Section (the Section Business meeting).
  - 2. Set and maintain the direction and goals of the Section during their term (Appendix 4)
  - 3. Work closely with and provide input to the Diplomat Award Chair, Program Chair, Secretary/Treasurer and Vice-Chair, coordinating activities and providing oversight and direction to the committees they chair.
  - 4. Have final approval on appointments of any committee members.
  - 5. Prepare a message for any issue of the Section newsletter.
  - 6. Attend, along with the Vice-Chair, the “Section Chair’s Meeting” held at the Annual Meeting.
  - 7. Invite all Past Chairs of the section to the reception held in their honor at the Annual Meeting.
  - 8. Assist the Chair of the Diplomat Award Committee by participating in candidate interviews as needed.
  - 9. Serve as liaison between the section and the Board of Directors of the Academy.

10. Present the newly elected leadership of the section to the Academy Board of Directors and recommend their appointment as prescribed in Academy bylaws.
11. Appoint those positions which are specified in the section bylaws as the Chair's responsibility. This occurs in the months before beginning their term as Chair (in the last months of their term as Vice-Chair). These include or may include:
  - a) Committees listed in the bylaws which require chair appointment. At this revision, those include:
    - i. The Chair of the Speakers Bureau
    - ii. The Chair of the Resident Recruitment Committee
  - b) Committees not listed in the bylaws (ad-hoc committees) which are at the discretion of the Chair and may be short-lived or long-standing and traditional. At this revision those include:
    - i. Annual Meeting Committee
    - ii. Communications Committee
12. Make replacements in non-elected positions or in vacated positions during their term.
13. Create new acting committees or sub-committees as deemed necessary for the function and betterment of the section.
14. Disband any ad-hoc committee in keeping with the interests of the Section.
15. Develop a budget for the section in cooperation with the section Secretary/Treasurer and present it to the Academy Secretary/Treasurer prior to the requested deadline.
16. Prepare an annual report for the Board of Directors.
17. Assign grievances and complaints to committee, entering into arbitration on such matters if necessary.
18. Prepare an annual calendar and set the agenda for scheduled meetings of the officers and/or the Executive Committee (Appendix 5). These meetings should include:
  - a) Spring planning meeting
  - b) Pre-Annual Meeting session (usually held one day prior to the Annual Meeting)
  - c) Section Business Meeting (usually held at the Annual Meeting)
  - d) Post-mortem meeting (follows the Business Meeting)
  - e) Meetings can be held virtually or in person as deemed by the chair to be most efficacious for their purpose.
19. Supervise the issuance of appropriate press releases and comments for *Optometry and Vision Science* and the optometric press.
20. Disseminate instructions and information from the Board of Directors.
21. Interpret Academy policy for the Section and formulate Section policy.
22. Be an ex-officio member of all committees of the Section.
23. Serve as liaison to allied organizations including (but not limited to) the American Optometric Association Contact Lens and Cornea Section (AOA CLCS), British Contact Lens Association (BCLA), Eye and Contact Lens Association (formerly CLAO), International Keratoconus

Academy (IKA), the Gas Permeable Lens Institute (GPLI), the American Academy of Orthokeratology and Myopia Control (AAOMC), the Optometric Cornea, Cataract and Refractive Society (OCCRS), the Scleral Lens Education Society (SLES), and the Contact Lens Society of America (CLSA). A budget line item can be established for the Chair and/or other Executive Committee members to attend meetings of such organizations at the discretion of the Chair.

24. At the end of their term, complete an historical account which will provide a comprehensive overview of the activities of the Section during their term.

B. The Vice-Chair shall:

1. Preside over meetings in the absence of the Chair.
2. Assume the responsibilities of the Section Chair in the case of incapacitating illness, unavoidable absence, or death of the Chair, until either the Chair can resume their duties or the President of the Academy can appoint an interim Chair.
3. Automatically assume the Chair as per section bylaws at the end of their term.
4. Appoint appropriate committee members in preparation for their assumption of the Chair (in the final months of their term as Vice-Chair as outlined in Section IV-A-10, above).
5. In the last 6 months of their term, update the Operations Manual in collaboration with the Secretary/Treasurer in preparation for modifications desired as they assume the Chair.
6. Either chair the Annual Meeting Committee or recommend to the Chair an appropriate Section member as Chair and present a list of members of that committee to the chair for approval.
7. Serve as an ex-officio member of all other Section committees.
8. Attend, along with the Chair, the "Section Chair's Meeting" at the Annual Meeting as well as any other meetings at the request of the Chair.
9. Direct and coordinate the development of position papers on topics deemed relevant by the Section Executive Committee.
10. See that existing position papers are reviewed and coordinate production of Section position papers on a semi-annual basis.
11. Responsible for (by way of the Annual Meeting Committee) logistical arrangements for the Section at the Annual Meeting of the Academy, submitting appropriate details to the Academy staff in a timely manner.
12. At the Section Business Meeting, present a report on the highlights of social events which occurred at the meeting and invite suggestions on improvements, enhancements for the next year.

C. The Secretary/Treasurer shall:

1. Generate minutes of any meetings of the Section officers or the Executive Committee as well as the Section Business meeting, forwarding drafts to the Chair for review prior to distribution to all Section officers.

2. Assist the Vice-Chair as directed in revision of the Operations Manual in preparation for modifications desired by the Vice-Chair as they assume the Chair (see also Section IV-B-5 above).
3. Chair the Communications Committee and present a list of members of that committee to the Chair for approval.
4. Coordinate a calendar of dates for meetings of the EC (in consultation with the Chair) and coordinate invitations to virtual meetings of the EC.
5. Oversee (but not appoint) the Chair of the Resident Recruitment committee and the distribution of Resident Travel grants.
6. Assist the Vice-Chair in procuring a plaque/gift for the outgoing Chair at the end of term.
7. Be responsible for the Diplomate renewal process for the Section. As per the section bylaws, the Secretary/Treasurer may designate a Diplomate to track renewal points and report on renewal status. Renewal is to be coordinated with Academy policy.
8. Oversee the storage of all Section documents and files in a secure and appropriately accessible cloud storage service (Appendix 7).
9. Be responsible for the Section finances and coordination with the Academy leadership and staff to ensure a true accounting of Section funds.
  - i. Prepare a summary of expenses at the end of the fiscal year.
  - ii. Prepare a budget for the new fiscal year and present to the Chair for review and refinement.
  - iii. Coordinate with AAO office/board regarding sponsors to the section at the highest level.
  - iv. Initiate contact and offer partnership/sponsorship to donors as appropriate for the section's interest and in conjunction with AAO policies on sponsorship.
  - v. Communicate and implement the reimbursement policy (expenses for Annual Meeting, etc.) set by the AAO board as it relates to section officers and volunteers.
  - vi. Present a report at the Section Business Meeting which outlines the financial situation of the Section at that time.

D. The Immediate Past Chair shall:

1. Serve as an advisor to the Chair of the Section.
2. Serve as the Chair of the Section's Nominating Committee as per the section bylaws.
3. Serve as the Chair of the Section's Awards Committee as per the section bylaws.
4. Communicate with the Secretary/Treasurer and the Vice-Chair regarding logistics necessary for the awards program/presentation.
5. At the Section Business Meeting, present a review of the activities of the Program and Nominating committee (as appropriate).

E. The Program Chair shall:

1. Be responsible for the section symposium presented as part of the Annual Meeting of the Academy.

- i. The topics for the symposium should be made 1 year (or more) in advance.
  - ii. Details of the symposia should be submitted to the Annual Meeting Program Committee of the Academy well in advance of the date determined by the Academy.
  - iii. As appropriate, work with representatives from ARVO, other Academy sections as well as other organizations interested in possibly sponsoring joint symposia.
2. Represent the Section on Cornea, Contact Lenses and Refractive Technologies at the Annual Meeting Planning Committee meeting (typically held on the last day of the Annual Meeting). Future meeting plans are discussed in detail at this meeting, so plans for future symposia are expected at this meeting.
  3. Represent the Section on Cornea, Contact Lenses and Refractive Technologies by participating with the Program Committee of the Academy when education, paper and poster presentation selections are made.
  4. Oversee (but not appoint the Chair of) the Speakers Bureau.
  5. Be responsible for the production of educational articles, webinars or other presentations that are specifically prepared and produced by the section.

F. The Diplomate Award Chair shall:

1. Serve as the chief administrator of the Diplomate Award process.
2. Serve as a facilitator, coordinator, and liaison for the Diplomate Award committee to the Executive Committee of the Section.
3. Assist and empower the Chair of the Research Diplomate Sub-Committee (appointed by the Chair).
4. Referee in the case of any dispute regarding the grading of any particular candidate or group of candidates.
5. Work diligently to ensure a smooth and positive transfer of oversight from the prior Diplomate Award Chair and, upon leaving the office, to the subsequent Diplomate Award Chair.
6. Coordinate with the Secretary/Treasurer the efficient storage of all documents related to the Diplomate Award process in a safe, secure and accessible cloud storage system.
7. Delegate and empower Sub-Committee members for various components of the Diplomate Award process (examinations, case reports, etc.) while maintaining tight accountability and ultimate responsibility for all of these processes.
8. Effectively communicate with all candidates at the onset of their application what expectations lie ahead of them. Communicate with all new candidates to ensure they understand the case report process and have reviewed the guidelines. It should be emphasized that one case report must be successfully approved prior to taking the examinations. At this time sample cases should be provided to assist the candidate with format, writing style, etc.

9. Ensure consistent communication is ongoing (by committee members delegated with that duty) with each candidate, whether they are making progress or not.
10. Proactively communicate with candidates throughout the year, and in particular, approximately three months before the Annual Meeting to encourage:
  - i. Completion of the process and awarding of the Diplomate to those for which it is possible.
  - ii. Progress in the process through the completion of requirements, retaking of examinations at the Annual Meeting.
  - iii. Confirmation of the dates/times/locations of examinations and interviews.
11. At least once during the two-year term as Diplomate Award Chair:
  - i. Conduct a survey of Diplomates regarding the current award process – differentiating between established Diplomates and those new to the process. Consider the input and views of new Diplomates highly in developing possible changes.
  - ii. Consider reasons potential candidates have given when not completing (or applying for) the Diplomate process and, if appropriate, incorporate changes that will attract and retain quality candidates to the process.
  - iii. Review and suggest changes, as appropriate, to the Diplomate Candidate Guides for the three categories of Diplomate. Such changes must be approved by the Executive Committee. This includes changes to examination composition, details and implementation.
12. Coordinate interviews with each candidate at the time of the Annual Meeting (in person if possible, virtually if not). These interviews can include and/or be delegated to other committee members and should include mentors to that candidate.
13. Delegate, oversee and review examinations to be administered at the Annual Meeting for accuracy, thoroughness, fairness and appropriateness to the context.
14. Coordinate with the Annual Meeting Committee the physical space needs at the Annual Meeting (for interviews and examinations).
15. Coordinate with the Academy office the procurement of transportation to the practical examination site, reimbursement of patient participation and complementary registration for practitioners who offer their practice as a site for the practical examination (if needed).
16. House the “lapel pins” in a safe place and bring them to the Annual Meeting to be presented to those likely to complete the Diplomate process.
17. Present Diplomates successful in completion of all requirements to the Section at a reception held in their honor at the Annual Meeting. Incorporate mentors and/or important persons to the new Diplomate in the ceremony as appropriate.



18. Immediately after the oral examination is successfully completed, report the new Diplomat's name to the Academy office representatives in order to coordinate the provision of the actual Diploma.
19. At the Section Business meeting, prepare a brief report to membership consisting of an analysis of current candidates (i.e. number currently involved, number lost to attrition, etc.), the introduction of the new Diplomates, and the recognition of the committee members.

## V. COMMITTEES OF THE SECTION, THEIR MEMBERSHIP AND THEIR RESPONSIBILITIES AND OBJECTIVES

### A. Committee membership and voting:

1. Committee Chair and Committee Sub-Chair positions all must be held by Diplomates of the Section.
2. Membership in the Diplomat Award Committee is limited to Diplomates.
3. Membership in committees can be either any section member, or limited to Diplomates only, depending on the purpose of the committee. In the same manner, a committee could consist of non-Diplomates, but voting would be limited to committee members who are Diplomates. This distinction should be specified by the Chair on creation and notated in this Operations Manual.

### B. The committees of the Section shall consist of the following:

1. Standing Committees created by Bylaws:
  - i. Executive Committee
  - ii. Program Committee
  - iii. Diplomat Award Committee
  - iv. Nominations Committee
  - v. Speakers Bureau
  - vi. Awards Committee
  - vii. Resident Recruitment Committee
  - viii. Diplomat Renewal (Director, not committee)
2. Other (ad hoc) committees (which are created or modified by the Chair at their discretion) present at the time of this update:
  - a) Communications Committee
  - b) Annual Meeting Committee

### C. The Executive Committee shall consist of the following:

1. Chair of the Section, Vice-Chair, Secretary/Treasurer, Program Chair, Diplomat Award Chair, Immediate Past Chair [as per Bylaws].
2. Duties and responsibilities of each position are outlined above in Section IV.

### D. The Program/Education Committee shall:

1. Consist of a Chair elected as a member of the Executive Committee and such section members as the Program Chair may appoint (submitted to the Chair for approval).
2. Organize all aspects of the section symposia for the Annual Meeting of the Academy.

- a) Annual Meeting plans should be made 1 to 1 1/2 years in advance and submitted to the Annual Meeting Program Committee of the Academy well in advance of the date determined by the Academy.
  - b) Consider collaborative symposium with other AAO Sections, SIGS and/or ARVO when the topic(s) are of mutual interest.
  - c) Those presenting should represent the highest level of knowledge on the topic and, when possible, be Diplomates of the section.
  - d) Moderators with specific expertise and presentational skills should be chosen.
  - e) Work within an appropriate budget (typically \$2,500-\$3,000)
    - a. Academy members do not receive honoraria or expense reimbursement to present.
    - b. Non-Academy members can be reimbursed for expenses and given an honorarium – guidelines set by the AAO board are to be adhered to strictly.
  - f) At this time, the detailed plans for the symposium is DUE on January 31 – it is suggested that we submit our plans in early December.
  - g) A social gathering of those presenting the symposium and the EC should be scheduled on the day of the presentation.
  - h) Room set-up and audio-visual needs, as well as any signage requirements are to be considered in cooperation with the Annual Meeting Committee.
3. Plan, organize and oversee the content, timing and distribution of any educational content (e.g. webinars) presented by the Section.
  4. Plan, organize and oversee the content, timing and distribution of any published advertisements or advertorials.
  5. Plan, organize and oversee any lectures or course meant to prepare candidates for the Diplomate examinations or to develop the advanced competencies that are expected of a Diplomate, with input from the Diplomate Award Chair and Committee.
  6. Plan, organize and oversee the activities of the Speakers Bureau.
- E. The Diplomate Award Committee:
1. Shall consist of a Chair elected as a member of the Executive Committee and such section members as the Diplomate Award Chair may appoint (submitted to the Chair for approval).
  2. Can be divided into sub-groups (not necessarily Sub-Committees) with the following responsibilities:
    - a) Case Reports
    - b) Written Examination
    - c) Practical Examination
    - d) Oral Examination
    - e) Advanced Competencies: Development of a Rubric which describes the skills and knowledge expected and/or desired of a clinical or research Diplomate
  3. One committee member shall be appointed by the section Chair as the Director of the Case Report process. This individual shall oversee a

Case Report Sub-Committee whose members mentor candidates in their case reports. The Director of Case Reports shall also oversee the timely and fair distribution, review and revision of the case reports. The Director of Case Reports shall:

- a) Maintain an updated list of Diplomates who have assisted in the case report review process. Only Diplomates who promptly return cases to the Director of Case Reports (i.e., within three weeks) and provide constructive feedback based upon a comprehensive review of the manuscript should be allowed to continue reviewing manuscripts. New Diplomates who have expressed an interest, in particular, should be used in the case report review process.
  - b) Submit each case to two reviewers for their comments. These reviewers will be required to complete a detailed evaluation form, reviewing the candidate's writing ability, case management, and understanding of the specific topic. A recommendation of Accept, Minor Revision, Major Revision or Reject should be made. If the two reviewers differ in their overall recommendation of a given case, the Director of Case Reports has the authority to make the final decision on how to proceed.
  - c) Coordinate and oversee the case report revision process:
    - i. Use diplomacy when providing input back to the candidate on a given case report. A reviewer's comments should be summarized in a separate correspondence to the candidate. If comments have been made on the paper itself, it can also be returned to the candidate; however, unprofessional, extremely critical or false comments should not be passed along to the candidate. Every effort should be made to have the evaluation sent to the candidate within one month after the case report was submitted.
    - ii. Encourage candidates when revisions are requested that the process is meant to encourage learning, growth and enhancement of personal skills and knowledge.
  - d) Delegate, if appropriate and desired the follow-up necessary when case reports are not accepted to other committee members who are assigned to particular candidates.
  - e) Supervise and oversee the Case Report Sub-Committee members' progress and process.
4. Case Report Sub-Committee members who interact with candidates shall:
- a) Act as mentor/guide to motivate, encourage and hold candidates accountable to timely submission of case reports and rigorous pursuit of completion of the Diplomate process.
  - b) Make decisions on whether a case report meets the specific guidelines. This includes whether the content of the case or, when indicated, the substitution of a publication is consistent with the case report guidelines.

- c) Submit the case reports to the Director of Case Reports after determining that the case report meets the specific guidelines.
  - d) Compile a list of any potential questions based on the case reports which should be kept with the candidate's file for eventual use at the Oral Examination.
  - e) Coordinate the Oral examination for the candidate.
  - f) Be available to meet with the Diplomate Award Chair at the Annual Meeting to interview candidates.
5. The Rubric Sub-Committee shall oversee and update any Written Examinations. The Written Examination(s):
- a) Will test the candidates' knowledge of cornea and anterior segment relevant to refractive technologies and contact lenses.
  - b) Shall be taken by at least one Diplomate who has not seen any part of the examination under the same condition as the candidates so that the examining committee will have a reference to which performance can be compared.
  - c) The examination shall consist of questions on subject matter related to physiology, pathology and anatomy of the adnexa, tears, conjunctiva, cornea and lens of the eye.
    - i. An understanding of landmark and current literature on these subjects may also be explored.
    - ii. Questions and answers should be documented and verified by committee members and the Diplomate Award Chair prior to final printing/electronic dissemination of the examination.
    - iii. A file of past examinations should be maintained for, at minimum, five years.
    - iv. The Written Examination should be such that any knowledgeable candidate can complete it in less than two hours.
    - v. The subject matter should be practical and related to the knowledge required to care for ocular conditions in the contact lens or refractive technology patient or those afflicted by any corneal disease, degeneration or dystrophy.
    - vi. If names are used to give credit to authors in questions related to current literature, the question should also mention the principles involved so that the candidate can answer in terms of principles rather than sheer memorization of names. Current literature questions should come from published papers in widely read journals.
    - vii. Questions pertaining to specific products should avoid reference to brand names or products available only in some countries.
  - d) The examination for those pursuing a Clinical Diplomate with emphasis on Contact Lenses shall consist of questions on subject matter related to:

- i. Evaluation of contact lens fitting – that is the relationship of the lens (of any type) on the ocular surface, able to differentiate a good fit from a poor fit and identify changes to the relationship which might improve a poor situation
  - ii. Knowledge of different lens designs, materials and appropriate care systems and care processes.
  - iii. Knowledge of various methods currently in use and discussed in the profession regarding myopia control.
  - iv. Basic knowledge of refractive technology applications, particularly as it relates to contact lens wearers seeking refractive (surface or lens-based) surgery other appropriate subjects in the areas of the application of contact lens technologies to the correction of ocular conditions.
- e) The examination provided to those pursuing an emphasis in Refractive Technologies should include:
- i. Identification of corneal topography and surgical approach(es) that would be most appropriate (and which would be inappropriate) for optimum visual outcome and minimal risk of adverse effect.
  - ii. Evaluation of various refractive surgery “platforms” currently in use for lower order (refractive error) and higher order optical aberrations.
  - iii. Understanding of appropriate pre-surgical testing and evaluation of the biometrics of the eye and the ocular surface, able to differentiate a good candidate from a poor candidate and identify interventions which might improve a poor situation and therefore improve outcomes.
  - iv. Knowledge of different methods of intra-ocular lenses, both those used in a phakic condition and a pseudo-phakic condition. Understanding the basic selection of different lens types that match the patient’s condition and desired outcome.
  - v. Basic knowledge of contact lens applications, particularly as it relates to contact lens wearers seeking refractive (surface or lens-based) surgery.
  - vi. Understanding and high-level ability to distinguish adverse effects from and complications due to refractive surgery – both anterior and lens-based.
  - vii. Basic knowledge regarding surgical management of corneal ectasia (e.g. corneal crosslinking, ICRS + CXL, etc.)
  - viii. Basic knowledge of pre-and post-operative management of ocular surface dry eye.
  - ix. Basic knowledge of myopia management (e.g. biometry, soft and CRT CLs, drops etc.)

6. The Practical Examination Sub-Committee shall oversee a practical examination designed to test the clinical skills of the candidate.

- a) Stations are typically developed to ascertain skills pertinent to both candidates with an emphasis in contact lenses as well as candidates with an emphasis in refractive technologies.
- b) Candidates with an emphasis on contact lenses can expect to be evaluated in all areas of biomicroscopy, fluorescein evaluation, evaluation of contact lens performance on eyes as well as contact lens measurement and materials and any other practical skills determined by the committee (eventually encoded into the “rubric” of a Diplomate).
- c) Candidates with an emphasis on refractive technology can expect to be evaluated in all areas of biomicroscopy, basic evaluation, evaluation of contact lens performance on eyes as well as assessment of irregularities to the ocular shape and surface or media the impact visual performance and/or suitability for surgical intervention as well as any other practical skills determined by the committee (eventually encoded into the “rubric” of a Diplomate).
- d) Appropriate proctors for this portion of the examination will be recruited and the use of an appropriate facility obtained in advance of the meeting.
- e) A “mentoring” program was reinstated in 2013 which should be given strong consideration for all subsequent practical examinations. The mentor-shadow is a suitable Diplomate who is not an examiner, but is present with the candidate at all stations and can be a source of great information and encouragement to both the committee as well as the Diplomate Award Chair during a later interview.
- f) Patients appropriate to the examination goals shall be recruited by the committee with the assistance of Diplomates, Academic institutions and/or other contact lens practitioners in/near the location of the upcoming meeting. The exact mix of patients/problems will (and should) vary from year to year. It is helpful to request that a brief case summary for the patients be provided to aid the proctors in their examination of the patient. The proctors should provide the patients with an orientation of what to expect during the course of the examination. Patients are compensated for participation in the practical examination.
- g) A scoring and grading criteria will be developed ahead of time. The coordinator of the Practical Examination should provide the proctors with an orientation as to the grading philosophy that will be employed. Historically the criteria for passing the practical examination has included:
  - i. Candidate must pass all four (4) biomicroscopy stations with a total of five (5) out of eight (8) “Pass” ratings from the proctors at these stations.
  - ii. Candidates must pass the majority of the other stations (fluorescein pattern evaluation and laboratory).

- iii. The Diplomate Award Chair will have ultimate decision authority in the event of a borderline candidate.
7. The Case Report Sub-Committee member who monitored the candidate will oversee an Oral Examination for candidates:
- a) Presently, the Oral Examination may be given only after successful completion of all other portions of the examination.
  - b) Coordinate and arrange for appropriate examiners for the Oral Examination.
    - i. Three Diplomates are to examine the candidate, one of whom should be a Past Chair of the Section. It is also customary that the three Diplomate examiners not be from the same mode of practice (i.e. industry, private practice or academia) nor should they have significant ties or collegiality with the candidate.
    - ii. The oral examiners will be selected by the Diplomate Award Chair, Director of Case Reports and the Case Report Sub-Committee member who guided the candidate.
    - iii. The interview should take place in a professional, neutral and private setting. It can be given by virtual means if necessary.
  - c) The Case Report Sub-Committee member will collect and provide to the examiners the candidate's case reports and other examination results – typically including a list of potential examination questions recommended by the case report reviewers – to aid them in their questioning.
  - d) The panel may also discuss contact lens, refractive technology and/or other anterior segment findings or observations that were presented in the leading ophthalmic publications within the past few years or represent truly landmark conclusions.
  - e) The oral examination is a two hour examination that allows candidates to defend their case reports and demonstrate improvement in any “weak areas” that were discovered during the examination process and communicated to the candidate in prior years at the interview.
  - f) The committee will also provide guidelines and grading sheets to the examiners to ensure that the candidate is treated in a fair and impartial manner.
  - g) The Diplomate Award Chair shall compile the evaluations of the three examiners and determine if there is any need for any deliberation to arrive at a consensus. If that need exists, the Diplomate Award Chair should confer with the Section Chair for a discussion with the examiners.
  - h) When consensus is reached with a pass or fail decision – the Diplomate Award Chair will communicate that decision to the candidate as soon as possible after it is finalized.
8. The Rubric Sub-Committee shall identify and quantify the skills and knowledge expected and/or desired of a clinical Diplomate.

- a) Once developed, a Rubric for Advance Competency will be reviewed by the Executive Committee for approval.
- b) The Rubric for Advance Competency will be utilized to collect appropriate questions for the written exam, structure an appropriate grading sheet for the case reports, practical and oral (clinical and research) examinations.
- c) The Rubric Sub-Committee Director shall oversee the Written Examinations.

F. The Nominating Committee:

- 1. Shall operate as specified by the section bylaws. Currently they state:
  - a) The committee consists of the current Chair, the immediate Past Chairs of the Section and the Past Chair once removed.
  - b) The most immediate Past Chair shall act as Chair of the Nominating Committee.
- 2. The duty of this committee is to review carefully the performance, abilities and potential of those who have been volunteers in the section and present a slate of officers for the upcoming two-year term.
- 3. There is no “automatic ascending” or “assumed chairmanship” granted on the basis of time served or prior responsibilities. The nominating committee shall determine who will serve the Section best for the upcoming term.
- 4. The Nominating Committee shall meet at the “mid-term” Academy meeting, or by virtual means shortly thereafter to deliberate the possibilities.
- 5. It is acceptable for the Vice-Chair to communicate observations and perhaps be allowed to address the committee in the early stages. Their plans and directions for their upcoming tenure as Chair may play a role in determining those nominated for elected positions.
- 6. The Nominating Committee shall create a list of candidates for the appropriate Executive Committee members of the Section by early January prior to the annual Section business meeting at which elections are held (even years). While not guaranteed election, those placed on the slate for election should have approximately six months to prepare for their new role prior to assuming the responsibilities.

G. Speakers Bureau

- 1. The Speakers Bureau Chair, who is appointed by the Section Chair, shall supervise the Speakers Bureau and be a member of the Program/Education committee.
- 2. The activities of the Speakers Bureau will be under the oversight of the Program Chair.
- 3. The Speakers Bureau Chair shall arrange for appropriate individuals of the Section [at this time specified in the bylaws to be Diplomates] to provide lectures to the Schools and Colleges of Optometry.
  - a) A separate budget is to be established to support this program, the limits of which will depend upon funding of the program.



- b) Speaker compensation shall consist of lecture/hour honorarium consistent with that provided for Academy Annual Meeting lectures and workshops, plus reasonable travel expenses.

H. Awards Committee:

1. The Awards Committee is currently specified in the bylaws to consist of the current Chair the immediate Past Chair and the Past Chair once removed of the Section and be chaired by the most immediate Past Chair.
  - a) This committee shall be responsible for selecting individuals for the Max Schapero Memorial Lecture and the Founder's Award.
  - b) Other awards that the Section may give are created by the Executive Committee, but nominations are received and processed by the Awards Committee.
  - c) Recommendations for all awards are to be submitted to the Academy Awards Committee for consideration and approval.
  - d) The Immediate Past Chair will be responsible for obtaining the award plaques, with the assistance of the Secretary/Treasurer.
2. The annual awards include:
  - a) Max Schapero Memorial Lecture: this award is in the form of a plaque that is given to a clinician, researcher, or scholar who has made a significant contribution to the cornea, contact lenses, or refractive technologies field by virtue of his or her publications, lectures, or research efforts. Recipients are asked to present a 20-30 minute lecture during the Section's program held at the American Academy of Optometry's Annual Meeting. The topic and content of the lecture are left to the discretion of the recipient and the Awards Committee but it should relate to the recipient's work in the cornea and contact lens field. An honorarium of \$1500 shall accompany this award. The honorarium shall come from Section funds. The recipient also receives complimentary meeting registration, two tickets to the event honoring the awardees, and two nights' lodging.
  - b) Founders' Award: this award is in memory, and in honor, of those Academy Fellows who founded the Cornea, Contact Lenses and Refractive Technologies Section of the American Academy of Optometry. This award has flexibility in that the Section can forego presentation of the award any particular year, or present it to more than one worthy individuals at a particular Annual Meeting. The Founders' Award is in the form of a "plaque of recognition". The award is to be presented to an individual, group, or company who has made an outstanding contribution to the clinical aspect of the art or science of contact lens fitting. The expense of preparing "plaques of recognition" is to be borne by the Section. The Section Chair will present this award at the Annual Meeting. In addition to the plaque, the recipient also receives complimentary meeting registration and two tickets to the event honoring the awardees.

- c) Exemplary Service Award: this award, in the form of a “plaque of recognition,” honors the exemplary service of those individuals who have given their time and energy to the Section. The awardee will receive the plaque at the Awards Program. The expense of preparing the plaque will be paid out of Section funds. This award is not typically given every year.

#### I. Resident Recruitment

1. The Section Chair shall appoint a member or members to oversee the Section’s funding of Resident Travel Grants.
2. If deemed necessary by the Chair, a committee can be formed to coordinate special projects related to Residents.
3. The relationship of the Section to the Residents shall be under the oversight of the Secretary/Treasurer and is a member of the Communications Committee.
4. The Section offers any optometry-based resident or graduate student working in the areas of cornea, contact lenses, and/or refractive technologies the ability to apply for the grant.
  - a) The grants are consistent with the Academy’s Student Travel Grants, and are for the purpose of helping to defray the Residents’ expenses of attending the Annual Meeting.
  - b) The number of grants available each year shall be determined based on section funds available and corporate support of this program.
  - c) Preference will be given to those who have not received the grant in the past, and no one shall receive more than two travel grants.
  - d) Preference shall be given to optometric residents.
  - e) If needed, the committee can impose some type of process to determine grant recipients if there are more applications than grants available any given year.
5. The Director of the Resident Program will coordinate with the Academy the distribution of the travel award payments, usually performed at the Section Awards Ceremony.

#### J. Diplomate Renewal Committee

1. The Secretary shall oversee the administration of Diplomate certification renewal. The Secretary may appoint a Diplomate to oversee the program and report to the Secretary.
2. Diplomate Renewal Director shall:
  - a) Be in constant contact with the Academy office regarding the proper format for delivery and/or input of fulfillment activities into the Academy database.
  - b) Approve any “pending” points within the database that requires Section approval.
  - c) Communicate to the membership annually where we are in the renewal cycle and review the requirements that are necessary to complete the renewal process. Forms should also be distributed to the Section committees (as appropriate) which will allow proper “credit” to be applied to Diplomates involved in Section

activities. These are to be completed by the various committees each year and returned to the Renewal Director.

- d) Not be required to hold this position for a full 5 years. However special consideration should be taken when the final year of a 5-year renewal cycle is approaching. An experienced person (or team) must be in place for the final year to insure proper handling of all impending deficiencies.
- e) During the final year of the five-year cycle, those who have not completed their requirements should be presented appropriate opportunities to achieve their necessary credits.

K. Communications Committee - Under the direction of the Secretary/Treasurer, this committee shall:

1. Keep a roster of active Diplomates and ensure that this list is consistent with the Secretary of the Academy and/or Academy staff responsible for the database (Appendix 6).
2. Take note of any Diplomat who passes away and obtain a summary of their career, the year they became a Diplomat and a picture to present at the Annual Meeting “in memoriam”.
3. Oversee the cloud storage and access of important files, images, documents and correspondence of the Section. The current status of the cloud storage is attached (Appendix 7).
4. Communicate regularly with the Section membership and/or Diplomates of the Section regarding the activities and projects of the Section. This communication can occur through email (newsletters), social media or other means that arise. This communication also includes the distribution of interesting cases submitted by Section members.
5. Coordinate the efforts of the Section to convert Section members to Diplomat candidates through outreach, encouragement and enlisting the help of other Diplomates to reach out to individuals who they encounter who would both receive value from and give value to the Section in a deeper way should they complete the Diplomat process.
6. Maintain and distribute a directory for the Executive Committee and the volunteer structure (committee members), with updated contact information. Distribute this directory after the Annual AAO Meeting and when there are any additions or deletions before the next AAO meeting (Appendix 3).
7. Prepare Section letterhead/stationary. Store stationary (MS Word and PDF format) in cloud storage for formal correspondence.
8. Oversee the documents that record the history of the Section (See Appendix 1). Included in these documents is the best listing possible of all individuals who have been granted the status of Diplomat, including those who are deceased or been made inactive by the Academy- Appendix 8 (this is separate from the “active list”: in V-K-1 above).
9. Once the Awards Committee has decided upon the Section’s award recipients, coordinate with the Awards Committee and Annual

Meeting Committee to determine who will be producing and transporting the appropriate plaques or certificates to the Academy meeting.

L. Annual Meeting Committee

1. In preparation for the important events and celebrations at the American Academy of Optometry's Annual Meeting, and to ensure smooth efficiencies and to consider all logistical concerns, a special committee has been created.
2. Purpose:
  - a) To honor the legacy of the Section.
  - b) To promote the social interaction of the Section members and the Diplomates of the Section as they gather at the meeting.
  - c) To plan and promote our Annual Meeting events and efforts to serve as a stimulus to attract potential new Diplomate candidates.
3. The committee shall:
  - a) Be in constant contact with the Section Chair and Vice-Chair on activities and planning.
  - b) Coordinate the request for space and meals within the AAO procedures for meeting space planning – usually 5-6 months before the meeting. This also includes “placards” outside the room with appropriate sponsor recognition.
    - i. Leadership meeting before the Annual Meeting on-site
    - ii. Diplomate Preparatory Course
    - iii. Welcome breakfast/reception
    - iv. Written examination
    - v. Candidate interviews
    - vi. Section Suite – includes refreshment supply oversight
    - vii. Awardee recognition
    - viii. Reception to honor the traditions – Past Chairs reception
    - ix. Section Business Meeting
  - c) Provide assistance to the Diplomate Award Committee, as needed, with logistical arrangements for the Practical Examination.
  - d) Coordinate with the Communications Committee regarding the advance notice/invitation/reservations of Diplomates at the various functions, as appropriate.
  - e) The Annual Meeting Committee will create any specific invitations, but the Communications Committee will oversee the distribution of same.
  - f) Determine the appropriate venue, food and ambiance for the reception honoring the new Diplomates. Secure the space for the reception well in advance, coordinating with the AAO office for any monetary guarantees and/or signatures needed.
  - g) Obtain a blank PowerPoint presentation that will be consistent with the Annual Meeting and add to it the section logo, the section leadership, the Ezell fellow for that year, those Diplomates we are remembering “in memoriam” and an accurate

sponsor appreciation slide. Distribute that slide to all leadership for their use during the meeting.

- h) Create a follow-up survey that attempts to gauge the areas of the meeting venue, food and activities that could be improved for the next meeting.

END of Operations Manual.

Appendix 1: Listing of current version/revision of each Diplomate Candidate Guide, History

Appendix 2: Listing of current version/revision of bylaws

Appendix 3: Current roster of Section leadership

Appendix 4: Chair's goals and directional statement

Appendix 5: Calendar of meetings

Appendix 6: Active Diplomate list

Appendix 7: Current cloud storage of Section documents, files

Appendix 8: All Diplomate list