

Guidelines for continuing professional development for endorsed and non-endorsed optometrists



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1. Authority

These *Guidelines for continuing professional development for endorsed and non-endorsed optometrists* have been developed by the Optometry Board of Australia under section 39 of the Health Practitioner Regulation National Law, as in force in each state and territory (the National Law).

Guidelines approved by a National Board may be used as evidence of what constitutes appropriate professional conduct or practice for optometrists in proceedings against a health practitioner under the National Law, or a law of a co-regulatory jurisdiction.

2. Introduction

Continuing professional development (CPD) is essential for optometrists to maintain their competence and develop the personal qualities required to deliver the quality of care that the community expects.

These guidelines have been developed to assist optometrists to meet the Optometry Board of Australia's (the Board) *Continuing professional development registration standard*. They also provide guidance for providers seeking accreditation of CPD activities.

3. Continuing professional development activities

Optometrists can meet the requirements by undertaking accredited or non-accredited activities, or a combination of both. There are different points values for the types of activity undertaken (see Table 1). The same points can be allocated to an accredited or non-accredited activity within a specific activity type.

Individual optometrists will have different needs for their ongoing professional development. Considering learning needs and developing a CPD portfolio will encourage learning consistent with the optometrist's professional role. It also involves reflecting on everyday practice to highlight areas of interest, as well as any limitations in professional practice.

When drafting their CPD learning needs and planning what CPD activities to undertake, optometrists should consider:

- areas of knowledge to improve
- identified gaps in both clinical and non-clinical competencies as an optometrist
- topics of particular interest or specialisation
- the accreditation status of the CPD activity and the provider's ability to provide you with quality education

- the experience, expertise and qualifications of the presenter(s)
- the location, date and time of the activity, and whether it is available online, and
- the format of the activity and whether it includes opportunities to interact with peers.

Clinical activities must deal with ocular conditions, systemic conditions with ocular effects, vision and visual perception, optometric management and/or ophthalmological management.

Non-clinical activities must be relevant to practice and improve the management of patients in some tangible way.

Accredited activities

Accredited CPD activities are those activities assessed as meeting the criteria in Appendix A: 'Criteria for continuing professional development activity accreditation'.

The Board has established a Continuing Professional Development Accreditation Committee (CPDAC) to oversee the accreditation process and determine the ongoing suitability of the criteria used.

Currently the Board authorises the national office of the Optometrists Association of Australia (the Association) to accredit CPD activities and assign CPD points. The Association operates under criteria and guidelines established by the Board. Any CPD activities provided by the national office of the Association will be accredited independently by the Board's CPDAC.

Providers of accredited activities will give the national office of the Association a list of optometrists who complete the activities. This will enable the national office to compile a report on optometrists' activities.

Non-accredited activities

Optometrists are able to meet the CPD requirements by completing accredited activities, non-accredited activities or a combination of accredited and non-accredited activities.

Optometrists completing non-accredited activities are responsible for deciding the type of activity and assigning the CPD points as per Table 1. Optometrists do not need to get approval from the Board before undertaking non-accredited activities; however they need to maintain records of any activities in accordance with the registration standard requirements.

To demonstrate to optometrists the types of non-accredited activities that would be expected to meet the Board's quality of education criteria, the Board may from

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time to time publish a list of such non-accredited CPD activities on its website.

Table 1: Continuing professional development activity types

Activity type	Key elements	Examples	Points allocated per learning hour
Face-to-face (clinical) ¹	Interaction with peers Discussion Group based 'Live' or in real time	Conferences Seminars Webinars Workshops Case reviews Journal club Postgraduate education Peer learning groups	2 points OR 3 points if there is an assessment component ²
Independent learning (clinical)	Solo activities Passive Undertaken at any time No 'direct' interaction with peers	Journal articles Electronic formatted lectures (e.g., podcasts, audio, DVD) Preparation time for presentations and materials to professional groups (NOT delivery of same) Publication in peer-reviewed journals	1 point OR 2 points if there is an assessment component ² OR 8 points per published paper
Academic (clinical)	Open to those involved in teaching in optometry	Teaching in optometric undergraduate course or participation or teaching in postgraduate optometric education Publication in peer-reviewed journals	5 points per subject per semester OR 8 points per published paper
Non-clinical	Profession-related activity	Business management Legal Occupational health and safety Cultural orientation	1 point

1 Registration in an activity is insufficient; participants must attend in full to meet the requirements of the registration standard.

2 Refer to Appendix A of these guidelines for further information.

4. Continuing professional development requirements

All practising optometrists must undertake CPD. The Board has established a registration standard in accordance with section 38(1)(c) of the National Law to set out the minimum requirements for CPD for optometrists (Table 2).

Table 2: Registration standard for continuing professional development requirements

- Optometrists must complete a minimum of 80 points of CPD activities over two registration periods.³ This can be met by undertaking accredited, non-accredited activities or a combination of both.
- Of the minimum 80 points over two registration periods:
 - a minimum of 24 points over two registration periods must be in face-to-face CPD activities,
 - 60 of the 80 points over two registration periods must be in clinical CPD activities,
 - no more than 20 of the 80 points over two registration periods may be obtained by completing activities relating to optical goods and equipment provided by suppliers or manufacturers, and
 - 40 of the 80 points over two registration periods must be in education related to endorsement for scheduled medicines for those optometrists endorsed under section 94 of the National Law.
- In addition to a minimum of 80 points over two registration periods, all registered optometrists must have completed, within the previous three registration periods, training in cardiopulmonary resuscitation (CPR) provided by or through an approved training provider.
- Where an optometrist has been registered for only part of a registration period, a pro-rata CPD requirement applies.⁴
- Optometrists who have notified the Board of an absence from practice for the majority of a registration period (1 December to 30 November) do not have to meet the CPD requirements for the period that they are not practising the profession. Optometrists absent from practice for a period of time greater than this should refer to the Board's *Recency of practice registration standard*.
- All optometrists must develop a CPD portfolio that identifies their learning needs and the type of activities they plan to undertake to meet those needs. In addition, this portfolio should include:
 - for accredited CPD activities, an summary record from the Optometrists Association of Australia, or any other approved provider, of accredited activities undertaken, and
 - for non-accredited CPD activities, the learning objectives of the activity, how it relates to the individual personal CPD needs, and an evaluation of the activities to determine whether the desired outcomes have been achieved.

3 December to 30 November for general registration

4 Pro-rata is not available to optometrists practising part-time or on a casual basis.

Endorsement for scheduled medicines

Optometrists who hold an endorsement for scheduled medicines under section 94 of the National Law must complete at least 40 points of the 80 over two registration periods in education related to the endorsement.

The Board has developed the following definition (Table 3) for activities related to endorsement to assist optometrists in choosing CPD activities and to provide guidance in the preparation and accreditation of CPD activities:

Table 3: Continuing professional development activities related to endorsement for scheduled medicines

Prescribing and supplying medicines are stages of therapeutic medication management.

Therapeutic medication management involves the following stages:

- patient assessment
- differential diagnosis of all conditions of the eye
- development of a management plan
- appropriate choice of medicines (this may involve writing a prescription, ceasing medicines, dose adjustment, advising on over-the-counter medicine)
- advice to the patient about the appropriate use of the medication
- development of a treatment plan
- monitoring outcome
- administration, and/or
- sale and supply if required and completing any necessary documentation.

Definition:

A CPD activity 'relevant to scheduled medicines endorsement' is an educational activity that meets the learning needs of the optometrist relevant to any of these stages of therapeutic medication management and assists in demonstrating one or more of the therapeutic competencies in the profession's competency standards.⁵

⁵ Optometrists Association Australia Universal (entry-level) and Therapeutic Competency Standards for Optometry 2008 (www.oanz.org).

It is expected that a significant component of the content and at least one of the learning objectives of the activity meet this definition for an activity to be eligible for CPD endorsement for scheduled medicines points.

Cardiopulmonary resuscitation

In addition to a minimum of 80 points over two registration periods, all registered optometrists must have completed, within the previous three registration periods, training in cardiopulmonary resuscitation (CPR) provided by or through an approved training provider.

Training courses registered on the training.gov.au website under training components listing the units of competency

for 'perform CPR' are nominally approved by the Board. This includes the familiar providers such as:

- Australian Red Cross
- Surf Life Saving Australia
- St John Ambulance Australia, and
- Royal Life Saving Australia.

To find a provider, go to www.training.gov.au and click on 'training components' under the search page; search for 'CPR' and then select the state or territory.

Compliance

Renewal requirements

All registered optometrists must make a declaration at annual renewal that they have or have not completed the CPD required under this standard *over the previous two registration periods*. Registered optometrists who fail to make such declaration, or who cannot satisfy the requirements, may be refused renewal of their registration or endorsement for scheduled medicines.

Audit

In order to determine compliance with this standard, the Board may at any time request a registered optometrist to provide their CPD records for audit by the Board.

Notifications

The Board may, in the course of an investigation arising from a complaint against an optometrist, require the registered optometrist to provide their CPD records over at least the previous two registration periods for review by the Board.

Consequence of noncompliance

The requirement to complete the CPD under this standard is a mandatory requirement under the National Law. Failure to comply may result the Board deciding to refuse the renewal of an applicant's registration.

Continuing professional development records

All optometrists must maintain up-to-date CPD records.

All optometrists are required to develop and maintain a CPD portfolio that identifies their learning needs and the type of activities they plan to undertake to meet those needs. Additional requirements for accredited or non-accredited activities are listed in Table 4.

Table 4: Continuing professional development record-keeping requirements

	Additional requirements
Accredited CPD activities	A summary record from the Optometrists Association of Australia, or any other approved provider, of accredited activities undertaken
Non-accredited CPD activities	<p>A CPD portfolio that lists:</p> <ul style="list-style-type: none"> the learning objectives of the activity how it relates to the individual personal CPD needs, and an evaluation of the activities to determine whether the desired outcomes have been achieved. <p>Supporting documentation in the form of:</p> <ul style="list-style-type: none"> receipts or other proof of attendance diary entries, and activity programs/brochures that describe the content and learning objectives of the activity.

The Board will publish CPD portfolio templates on its website to assist optometrists to meet this requirement.

5. Absence from practice

All optometrists practising the profession are expected to meet the requirements of the Board's *Continuing professional development registration standard*.

Where an optometrist has been registered for only part of a registration period, a pro-rata CPD requirement applies.⁶

Optometrists who have notified the Board of an absence from practice for the majority of a registration period (1 December to 30 November) do not have to meet the CPD requirements for the period that they are not practising the profession. Optometrists absent from practice for a period of time greater than this should refer to the Board's *Recency of practice registration standard*.

This temporary absence from practice, of up to 12 months, needs to be associated with special circumstances such as extended leave (e.g. family leave or long-service leave) or illness. Optometrists are required to complete a pro-rata level of CPD requirements for any part of the registration period for which they practise the profession. Optometrists absent from practice or longer than 12 months should refer to the Board's *Recency of practice registration standard*.

Information on how to notify the Board of the temporary absence will be published on the Board's website.

⁶ Pro-rata is not available to optometrists practising part-time or on a casual basis.

6. Exemptions

The Board believes the range of activities and the time frame provided to meet the CPD requirements is broad and flexible enough for all optometrists to meet the requirements. However, the Board also appreciates that there are times when exceptional circumstances may make this difficult. In this case an optometrist may apply in writing to the Board for an exemption.

The exceptional circumstances for exemptions will be limited and would only be considered where there is compelling evidence that the circumstances have created a significant obstacle to the optometrist's ability to complete CPD requirements. Each case would be considered on its merits and, depending on the particular circumstances, the Board may decide upon a full, partial or complete exemption. The Board will also consider the requirements of its recency of practice standard in any application.

As a general principle, financial hardship or remote location are not adequate grounds for a partial exemption as there are sufficient CPD activities in a range of formats available to overcome these obstacles. Evidence of a history of undertaking CPD activities will be taken into account by the Board when assessing applications for exemption.

The Board will only consider an exemption in one year of any four-year period. The Board is of the view that where an optometrist is able to practise the profession, they also need to complete the CPD requirements.

Information on how to apply for an exemption will be published on the Board's website.

7. Providers of continuing professional development activities

CPD activities may be provided by a range of providers.

Approved providers

The Board has developed criteria for approved provider status (see Appendix C of these guidelines) and has published a list of current approved providers at Appendix B of these guidelines.

Activities provided by an approved provider are considered to be accredited activities and the approved provider will assign the applicable number of CPD points.

Other providers

While it is not a specific requirement, all other providers are eligible to apply for accreditation of their CPD activities by

the Board. This will assist optometrists in pre-assessing the standing of any activity. The Board has developed a *Continuing professional development provider manual* to guide providers through the accreditation process.

With the increased demand for CPD, the Board will encourage all providers to expand the availability of their activities to rural and remote practitioners.

Audit of providers

The Board may at any time audit the accredited activities provided by CPD providers to assess compliance with the criteria for continuing professional development activity accreditation listed in Appendix A of these guidelines. If it is determined by the Board's CPDAC that a provider has failed to ensure the delivery of quality education, the provider may be ineligible for accreditation of future activities for a period determined by the Board. The delivery of quality education includes ensuring attendance of optometrists during face-to-face CPD activities.

When applying for accreditation, CPD providers will need to explain how they will monitor attendance and participation during face-to-face activities.

Feedback on quality of activities

The Board is interested in ensuring that there is a range of quality activities for optometrists to meet the CPD requirements.

Optometrists concerned about the quality of the CPD activity that they have undertaken are encouraged to notify the Board in writing of their concerns.

Information on this process will be published on the Board's website.

8. Definitions

Approved provider means a provider considered by the Board as meeting the criteria listed in Appendix C of these guidelines: 'Criteria for gaining approved provider status'.

Approved training provider is an entity approved by the Board for the purpose of provision of training in cardiopulmonary resuscitation.

Cardiopulmonary resuscitation (CPR) is the technique of rescue breathing combined with chest compressions, to temporarily maintain circulation to preserve brain function until specialised treatment is available. (Australian Resuscitation Council)

Continuing professional development (CPD) is the means by which optometrists maintain, improve and broaden their knowledge, expertise and competence, and develop the personal and professional qualities

required throughout their professional lives. It involves self-assessment of learning needs and desired outcomes, undertaking a range of activities, and reflection on the activity meeting these learning needs.

- **Accredited CPD activities** mean CPD activities that have been accredited by the Board in accordance with these guidelines and the Board's *Continuing professional development provider manual*.
- **Non-accredited CPD activities** mean CPD activities that have not been accredited by the Board. Optometrists are able to meet the requirements of this standard by completing non-accredited activities but the record-keeping requirements are different.

Appendix A: Criteria for continuing professional development activity accreditation

These criteria are to be used by all providers of accredited CPD activities. Further information on the accreditation process is available in the *Continuing professional development provider manual* published on the Board's website.

A1 Continuing professional development activity

Providers should review Table 1: Continuing professional development activity types for examples of each activity type. All accredited activities should be clinical or non-clinical.

Table A1 provides guidance as to nature of activity, and point allocation, additional to the descriptions of activities in Table 1 earlier.

Clinical activities must deal with ocular conditions, systemic conditions with ocular effects, vision and visual perception, optometric management and/or ophthalmological management.

Non-clinical activities must be relevant to practice and improve the management of patients in some tangible way.

Table A1: Specific criteria for accreditation of activity types

Activity type	Specific criteria	Points allocated per learning hour*
Face-to-face (clinical) ⁷	<p>Must be in real time (i.e. live). Allow interaction between presenter and participant and between participants.</p> <p>Practical, small group workshops should have a presenter to participant ratio of 1:20.</p> <p>For activities accompanied by a meal, only the presentation component will be counted for the purpose of accreditation.</p>	<p>2 points</p> <p>OR</p> <p>3 points if accompanied by an assessment component (A6) **</p>
Independent learning (clinical)	Must adhere to the additional criteria for independent learning (A7) as well as all other criteria	<p>1 point</p> <p>OR</p> <p>2 points if accompanied by an assessment component (A6)</p>

⁷ Completion of an approved postgraduate certificate in ocular therapeutics will satisfy the face-to-face and overall CPD requirements for a two-year period.

Activity type	Specific criteria	Points allocated per learning hour*
Non-clinical#	Non-clinical education relevant to practice includes activities that can improve the management of some patients in a tangible way; these activities are awarded one point per hour, with a maximum of 10 points per year; for example, business management, law, psychology, foreign languages, first aid, occupational health and safety and dietetics.	1 point

*Points allocated are based on an activity of one learning-hour duration (or equivalent for independent learning activities).

** Small group workshops allocated 3 points per hour, with or without assessment, if ratio met.

#Non-clinical activities are delivered as per clinical activities (conferences, seminars, webinars, workshops, audio, DVDs and podcasts); however, will only be allocated 1 point per hour.

A2 Quality of education

The content of the activity must reflect accepted optometric practice based on critical appraisal of the scientific literature. Activities promoting theories and techniques that are not supported by scientific evidence, nor generally accepted by the optometric profession will not be eligible for accreditation. Any materials presented should be current, relevant and at an appropriate level of education for Australian optometrists. It is unlikely that a course would be accredited if it was not intended for optometrists or other registered health practitioners.

The educational format should reflect research-based, proven, best educational practice principles. In order to qualify for accreditation, providers will be encouraged to review their presentations and adopt progressive, up-to-date educational principles. Adult learning theory and research suggests that effective CPD activities should adopt innovative methods of presentation such as hands-on learning opportunities, peer-based study groups, small breakout sessions during large lecture-based presentations, and more interactive online seminars.

Activities should be engaging and effective in delivering the stated learning outcomes. Providers may be requested to make improvements to the delivery or content of any materials in order to have their activity accredited.

The Board may conduct random audits for educational quality. If it is determined by a committee established by the Board that a provider has failed to ensure the delivery of quality education, the provider may be ineligible for accreditation of future activities. The delivery of quality education includes ensuring attendance of optometrists during face-to-face CPD activities.

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When applying for accreditation, CPD providers will need to explain how they will monitor attendance and participation during face-to-face activities.

With the increased demand for CPD, the Board will encourage providers to expand the availability of their activities to meet the needs of optometrists living in rural and regional areas.

A3 Ethical and legal standards

CPD activities must comply with the Board's *Code of Conduct* for optometrists and accepted ethical standards expected within health services and higher education providers.

When presenting information about patients (e.g. case reports), care must be taken to ensure that the identities of patients are not disclosed. Where this is not possible (e.g. in the use of images), the informed consent of patients must be obtained. Providers may be asked to provide evidence of this when applying for accreditation.

Content that is subject to copyright should not be presented unless relevant permissions have been sought and granted.

A4 Learning objectives

The Board is interested in assisting optometrists to participate in a range of CPD activities that are both relevant and engaging for individual optometrists' development. In choosing CPD activities, optometrists are required to assess their personal CPD learning needs and the desired outcomes of CPD activities.

To assist optometrists to make relevant choices, it is important that CPD activities list the expected learning objectives for all accredited CPD activities. Optometrists will then be better placed to make decisions on what CPD to undertake in line with their own self-assessed needs.

Providers applying for accreditation should provide a minimum of three learning objectives for each hour or equivalent of activity. If a program is submitted for accreditation as a whole there number of learning objectives will be discussed with the provider at the time.

Providers should refer to the *Continuing professional development provider manual* information on the development of learning objectives.

A5 Point calculation

One of the outcomes of the accreditation assessment process is the allocation of CPD points. The number of points available for each CPD activity group is listed in Table 1 of these guidelines.

For a CPD activity to be accredited, it must be of one hour duration (or equivalent for independent learning activities). This hour may be segmented by use of multiple speakers.

Activities that do not meet this minimum duration of one hour will not be accredited.

Further information on the calculation of the CPD points is included in the *Continuing professional development provider manual* published on the Board's website.

A6 Assessment

The Board believes any assessment provides optometrists with the opportunity to consider the results in the context of their CPD plan. Feedback on learning is an important principle in adult learning.

Both face-to-face activities and independent learning activities are eligible for additional allocation of points if the activity includes assessment.

For this additional point to be allocated, the assessment component must:

- include a feedback mechanism to participants at the time of assessment or a reasonable time after the activity so they can review their results against the correct answer
- provide a follow-up opportunity for participants to redo the assessment, and
- the score must be at least 70 per cent on the final attempt.

There is no compulsion to include assessment with any CPD activity. In deciding whether assessment will be included, providers should consider the principles listed in Table A2.

Table A2: Principles for inclusion of assessment

1. All assessment should be directly linked to the learning objectives of the activity.
2. Inclusion of assessment should add value and quality to the activity.
3. Assessment should only be included at the time of the presentation if it does not detract from the presentation or distract participants.
4. Inclusion of the assessment should not reduce opportunities for questions from a presenter or opportunities for discussion, including interaction with peers.
5. Providers, or examiners engaged by providers, are expected to have the appropriate skills and experience to design appropriate assessment questions.
6. Assessment should generally be in the form of multiple choice questions (MCQs).⁷
7. Assessment style and conduct remains the responsibility of the CPD provider.
8. Assessment questions need to be included with the application for accreditation.
9. There should be six questions for each learning hour of face-to-face activity.
10. There should be at least 10 MCQs for each learning hour (or equivalent) for independent learning activities.

A7 Independent learning activities

As well as the criteria listed in A1–A6 and A8, independent learning activities (not conducted face-to-face in real time) are required to meet the following criteria.

They should include information that is predominantly of overall relevancy and at an appropriate level of education for Australian optometrists. Where international terms are used, a cover note or explanation should be given at the start of the activity.

For every learning hour, it is expected that each activity will generally include at least four A4-size pages of optometry-related text (equates to approximately 3000 words) or equivalent amount of content delivered via audio or visual means.

There should be at least 10 MCQs for each learning hour (or equivalent) for independent activities.

The use of colour, diagrams, graphics, audio and visual demonstrations is preferred.

Providers may be requested to make improvements to the format, presentation or content of any materials before accreditation is granted.

Initial accreditation approvals for independent learning activities will be valid until the end of the current registration period.

If a provider wishes to present a course again after its approval period has expired, they will have to submit another application.

Points should not be allocated to participants who have completed the same activity in the previous registration period.

A8 Feedback

It is vital for the ongoing provision of quality CPD activities that providers seek feedback from participants for any accredited CPD activity. The feedback may take many formats and may occur at the time of the activity or after the activity. Feedback on the quality of the CPD activity should:

- be timed to encourage optometrists to provide quality feedback, and in a format that encourages quality feedback
- check if the optometrist believed the activity was aligned with the stated learning objectives
- provide optometrists with the opportunity to reflect on how the activity met their learning needs, and
- be distinct from feedback on the venue and facilities.

Providers are required to outline the feedback methodology when applying for accreditation, and a report is required when submitting course completion details.

Appendix B: Approved CPD providers

Continuing professional development activities provided by the following organisations are recognised as meeting the criteria for CPD activity accreditation:

- The University of Melbourne, Department of Optometry and Vision Sciences
- Queensland University of Technology, School of Optometry and Vision Sciences
- University of New South Wales, School of Optometry and Vision Science
- The University of Auckland, Department of Optometry and Vision Science
- Optometrists Association Australia – State Divisions⁹
- Australian College of Optometry, and
- Centre for Eye Health, New South Wales.

⁹ Activities provided by the national office of the Optometrists Association of Australia will be accredited independently by the Board's Continuing Professional Development Accreditation Committee.

Appendix C: Criteria for gaining approved provider status

To be considered for approved provider status and to maintain this status, an organisation *must*:

- have education of optometrists as one of its principal activities
- have adequate expertise in providing quality education at a standard that is appropriate for Australian optometrists
- have a proven record of providing quality optometric CPD and a history of complying with the criteria for CPD activity accreditation, and
- notify the Board of any changes to the organisation's details that were provided to the Board during the application process.

Additionally, an approved provider *must not*:

- have any obvious conflicts of interest that may affect the quality or impartiality of the educational content; organisations such as optical wholesalers and ophthalmic surgery centres generally will not be eligible for approved provider status
- unreasonably prevent optometrists from enrolling in and attending their CPD activities; unreasonable restrictions include employment status and geographic location, and
- delegate the task of developing or coordinating the educational content of its CPD activities.

The register of approved providers will be reviewed annually; approved provider status is granted at the discretion of the Board and can be revoked at any time.