

**Binocular Vision, Perception, and Pediatric Optometry Section of  
the American Academy of Optometry**

**Manual of Procedures**

May 9, 2023

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## I. Mission & Responsibilities

### Mission

The mission of the Binocular Vision, Perception, and Pediatric Optometry Section is to foster and conduct clinical, educational, and research activities in binocular vision, visual information processing, and pediatric optometry.

### Responsibilities

- Serve at the appointment and pleasure of the Board of Directors of the American Academy of Optometry.
- Serve as a primary resource for the Academy for papers, posters, courses, information and research regarding the diagnosis and management of binocular vision, visual information processing, and pediatric eye conditions and advise the Board of Directors on policy in these areas.
- Encourage inquiry and research into the diagnosis and management of binocular vision, visual information processing, and pediatric conditions by providing a forum for practitioners and scientists, where new advances in the field may be presented, questioned, and defended.
- Promote, advance, and enhance the identity of optometry as a profession with expertise in binocular vision, visual information processing, and pediatric optometry.
- Encourage Academy Fellows to increase their competence in the diagnosis and management of binocular vision, visual information processing, and pediatric eye conditions.
- Develop and implement a diplomate program to recognize those who demonstrate a broad base of knowledge and expertise in binocular vision, visual information processing and pediatric eye conditions.

## II. Membership

### Member

A member of the BVPPO Section shall be a fellow of the American Academy of Optometry who has joined the BVPPO Section and participates in its activities.

A minimum of 100 Fellows, verified every six years, are required to form and maintain the BVPPO Section. Only Section members who are Fellows may participate in voting (hereinafter 'voting members'), unless otherwise specified.

### Diplomate

A Diplomate is a Section member who has successfully completed the examination process administered by the Section and has 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 Diplomate Candidate Guide.

A minimum of 5 new Diplomates every six years is required to maintain a Section. In the event that this goal is not achieved, the Section must petition the Board of Directors for a waiver to this requirement.

### III. Meetings

The Annual Section Business Meeting should be held during the Annual Academy Meeting.

A minimum of 10 Section members present at any Section meeting constitutes a quorum for the transaction of business.

All binding action(s) of the Section should be by a majority vote of the members present. All Section members may participate in voting, with the exception of voting on changes to the Diplomate Program, in which case, only Diplomates may vote.

Except as may otherwise be required by the Bylaws of the Academy, all meetings should be governed by the parliamentary rules and usages contained in the current edition of Robert's Rules of Order.

### IV. Leadership

#### Officers 2023-2024

Position	Name	Email
Chair	Angela Chen	angelachen@ketchum.edu
Immediate Past Chair	Christine Allison	callison@ico.edu
Vice-Chair	Ron Gall	ron@oakvillecentreforvision.com
Clinical Diplomate Chair	Cara Frasco Lai	frascalai5@gmail.com
Clinical Diplomate Vice-Chair	Erin Jenewein	ejenewein@salus.edu
Research Diplomate Chair	Mark Rosenfield	mrosenfield@sunyopt.edu

#### Other Positions 2022-2024

Position	Name	Email
Diplomate Case Reports Chair	Ann Webber	al.webber@qut.edu.au
Diplomate Written Exam	Jamal Rizwana Hussaindeen	rizwanaopto@gmail.com
Diplomate Practical Exam	Diplomate Vice Chair	
Diplomate Oral Exam	Mitchell Scheiman	mscheiman@salus.edu
Members Relations Chair	Melissa Rice	melissa.rice@cchmc.org
Program Chair	Marjean Kulp Ann Morrison	Kulp.6@osu.edu Morrison.421@osu.edu

#### Executive Committee

The Executive Committee consists of the Section Chair, Section Vice-Chair, Clinical Diplomate Chair, Clinical Diplomate Vice-Chair, Research Diplomate Chair, and Immediate Past Chair.

#### Terms of Office

- All terms of office shall begin at the close of each even numbered year's Annual Academy Meeting at which the election takes place and shall end two years hence at the close of the Annual Academy.
- The Executive Committee shall be empowered to seek the removal from office of any officer for such cause as will preserve the dignity and integrity of the organization. A majority of the Section Officers should be required to petition the Board of Directors to remove an elected Section Officer. If an office

becomes vacant by resignation, illness, death, or refusal to act, a replacement shall be appointed by the Section Chair for the remainder of that Officer's term. Should the office of the Section Chair become vacant, the Section Vice-Chair shall assume the duties of the Section Chair.

## Elections

- Only Fellows of the Academy may run for elected office in the Section, which includes Section Chair, Section Vice-Chair, Clinical Diplomate Chair, Clinical Diplomate Vice-Chair, and Research Diplomate Chair.
- Only Clinical Diplomates in the Section may serve as Clinical Diplomate Chair and Clinical Diplomate Vice-Chair.
- The Section officers shall be elected biennially by the Section members at the Annual Business Meeting of the Section. A majority of the votes cast for a particular office shall be required for election to that office. An individual may serve only one consecutive term for each of the elected offices, except for the Research Diplomate Chair.
- Nominations from the floor shall be allowed.

## V. Officer Duties

Officers serve 2-year terms, which concludes at the end of the annual AAO meeting of the 2<sup>nd</sup> year.

### Section Chair

It is the responsibility of the Section Chair to perform the following:

#### At the Annual AAO Meeting

- Coordinate BVPPO Section Business Meeting at the Annual Academy Meeting; develop the agenda, arrange the time and place of meeting, and preside over the meeting. The meeting is typically held on Thursday at noon.
- Coordinate BVPPO Diplomate Meeting- optional meeting for Diplomates only. Typically held immediately following the Section Business Meeting. Develop the agenda, arrange the time and place of meeting, and preside over the meeting.
- Coordinate the Section's Leadership Meeting -this meeting has typically been held on Tuesday night prior to the start of the AAO meeting.
- Attend the Section/Sig Chairs meeting, if offered. The Board Liaison will choose the day and time of this meeting.
- Sign Diplomate certificates if there are new diplomates.
- Attend the banquet to represent the Section and participate in the recognition of new Diplomates.
- Coordinate and attend the Section Reception, typically held on Thursday evening.
- Attend any Diplomate activities that require the Chair's presence.

#### Bring to the Annual Meeting

- Prepare copies of the agendas, prior year's minutes, and any additional information that might be needed to conduct Section business for the Leadership Meeting and Section Business Meeting.

#### Immediately Following the Annual Meeting

- Submit a Section Chair's report to the Board of Directors through the Board Liaison. (See Appendix A for a sample of this report). The form will be provided by AAO.
- Follow up on any business resulting from AAO meeting, such as checking for needed updates to Section MOP and Diplomate guidelines, etc.

#### March

- Prepare and submit an annual budget for the Section to the Director of Finance of the Academy. Currently (2021) this position is held by Richard Jones, who will email and request this information. (See Appendix C for a budget form)
- Communicate with the Clinical Diplomate Chair and Vice-Chair about the potential for a practical exam and location.

#### Summer

- Chair will receive a room request from the conference vendor for the Annual Academy Meeting. Room requests are done electronically, and include room set up, number of expected attendees, A/V needs and preferred date/times. Room requests should cover:
  - Clinical Diplomate Written Exam

- Clinical Diplomate Oral Exam
- Research Diplomate Oral Exam
- Diplomate Prep Course, if offered in person (typically on Tuesday)
- Section Business Meeting (typically held Thursday at lunch). Note to try to avoid conflict with AAO Fellow Meeting and ASCO Binocular Vision and Perception Educators SIG Meeting.
- Section Reception. Typically, the Section Reception is held from 7:30-9pm on Thursday of the Annual Meeting.
- BVPPO Residency Mixer. The Mixer has been held prior to the Section Reception (6:30-7:30) in a separate room.
- Communicate with Clinical and Research Diplomate Chairs regarding who is taking the Diplomate exam. Answer questions/mentor the Clinical Diplomate Chair and Vice-Chair in planning exams.
- Contact section officers (in election year) to determine their willingness to move up to the next position. Determine, in consultation with them, who should be asked to serve as Case Reports Chair (since that person usually moves up to Clinical Diplomate Vice-Chair). Contact people regarding any open positions for Section committees.

#### Fall/Prior to the Annual Meeting

- Work with the Member Relations Committee to inform the Section members with a reminder about the date/time of the Section Business Meeting and the Section Reception. This is handled through the AAO Office. Currently (2023) Michelle Edwards is the contact person.
- Prepare the agendas for the Business Meeting and Leadership Meeting and circulate to officers for comments/additions.
- Make dinner reservation for Leadership Meeting.
- Field questions about meeting plans.
- Email AAO Office with names of potential Diplomates so certificates can be generated.

#### Ongoing Responsibilities and Additional Information

- Appoint and/or approve the Chair of any committees within the Section who are to hold office during their term as Chair (i.e., Program Chair, Diplomate subcommittee chairs for Case Reports, Written Examination and Oral Examination; subcommittees for Position Papers or other Section activities).
- Supervise the performance of all activities of the Section and perform such duties and acts that usually pertain to this office.
- Communicate with the Section officers and membership through email and conference calls. Conference calls should be conducted quarterly (recommend December/January, March/April, June/July, September/October) pending date of Annual Meeting.
- Coordinate all correspondence between Section and Academy Office and BOD Liaison.
- Helen Viksnins at the Academy office can provide general information and answer most questions or direct you to the appropriate person.

#### Section Vice Chair

It is the responsibility of the Section Vice-Chair to:

- Aid the Chair in the performance of their duties in such a manner and to such extent requested.
- Take minutes at the Annual Section Business Meeting and submit the draft version to the Chair for posting on the Section's web page (subject to approval at the next Annual Section Business Meeting).



- Take minutes at the Annual Leadership Meeting and any Executive Committee conference calls and distribute to section leadership (See Appendix F: Sample Meeting Minutes).
- Upon the death, resignation or during disability of the Chair or upon refusal to act, perform the duties of the Chair for the remainder of his/her term or disability, as the case may be.

#### Immediate Past Chair

It is the responsibility of the Immediate Past Chair to:

- Aid the Section Chair in the performance of their duties as requested.
- Work with Clinical and Research Diplomate Chairs to maintain the Diplomate Renewals.
- Ensure all Diplomates comply with the requirements to maintain and renew their Diplomate status.
- Submit report to the Section Chair of all Diplomates that have been recommended for renewal, as needed.
- Submit report to the Section Chair of all active Diplomates and those that have changed their status, as needed.
- Work with Section Chair to update MOP and AAO Staff contact information.

## VI. Diplomate Program Officer Duties

The Diplomate Program Committee consists of the Clinical Diplomate Chair, Clinical Diplomate Vice-Chair, Research Diplomate Chair, and Subcommittee Chairs (Case Reports, Written Examination, and Oral Examination). Each Subcommittee Chair shall select subcommittee members to carry out the work of reviewing case reports or developing and conducting examinations, in consultation with the Clinical Diplomate Chair.

### Clinical Diplomate Chair

It is the responsibility of the Clinical Diplomate Chair to:

- Ensure that the integrity and quality of the program are maintained and the prescribed process for achieving Diplomate status is followed.
- Collect applications from new candidates as they arrive from the AAO Office and ensure the application is complete (application, Diplomate track selected, mode of practice, CV).
- Maintain up-to-date files of candidates in the Diplomate process.
- Coordinate the overall activities of the Diplomate program, including informing candidates of the time and place of all examinations at the Annual Meeting.
- Continuously review the candidacy process, encouraging and mentoring the candidates.
- Solicit candidates' feedback on the Clinical Diplomate Process (e.g., Prep course topics and whether in-person or virtual, what more support is needed, etc.)
- Assign mentor to each candidate and keep a record of the mentor for each candidate.
- Periodically contact inactive candidates and assist them to move forward in the diplomate process, with particular attention to candidates near the end of their 5-year application term.
- Provide guidance to the officers and members of the Diplomate Program Committee.
- Recruit members for the Diplomate Program Committees.
- Keep the Section Chair and the Academy Office informed of the status of candidates and new Diplomates.
- During meetings when examination activities occur, it is the responsibility of the Clinical Diplomate Chair to inform the candidates of the results of the written and practical examinations and the areas of strength and weakness prior to additional testing. The Clinical Diplomate Chair also needs to inform the oral subcommittee chair of the areas of weakness that should be stressed on the oral exam.
- Immediately after the Annual Meeting, work with the members relation committee to update the BVPPPO Diplomate directory of the AAO website and verify that all current information is correct.
- The Clinical Diplomate Chair has other specific duties related to the written, practical and oral examinations. (See Appendices G&H for detailed information.)
- Maintain the Diplomate Renewals. Responsibilities include entering section and diplomate activities in the diplomate renewal portal and review and approve other activities entered by the candidate. (Working with Immediate Past Chair)
- Plan and implement events to promote the Diplomate program.
- Plan diplomate prep courses, either in-person the Tuesday prior to the AAO Meeting or virtually. For in-person diplomate prep course, submit course outline to the L&W Submission Portal during the submission window which closes which closes at the end of January. (See Appendix B for prior submissions)

## Clinical Diplomate Vice-Chair

It is the responsibility of the Clinical Diplomate Vice-Chair to:

- Assist the Clinical Diplomate Chair in the performance of his/her duties in such a manner and to such extent as the Chair may request. The Diplomate Vice-Chair coordinates the Practical Examination at the Annual Meeting, and in this capacity is responsible for:
  - Finding a local host doctor or clinic for the practical examination.
  - Communicating with the host regarding facilities, patients, patient records, and equipment.
  - Informing the candidates of the time and place of the examination, as well as equipment they need to bring.
  - Selecting Diplomates to assist with the examination (usually 3 are needed for 1-2 candidates).
    - 3 examiners and 1 back-up
  - Arranging transportation for the candidates and examiners to and from the examination.
    - Candidates get to the exam site on their own. The Diplomate Vice-Chair should provide directions and travel information. The examiners travel together in a cab or rental car.
  - Providing recording forms and appropriate equipment for the examination.
  - Reimbursement of patients (\$50 cash/patient) and a small gift for the host (\$50 gift card). It is the Diplomate Vice-Chair's responsibility to bring the reimbursement cash (The AAO Office will reimburse you if you keep a receipt).
  - Give a thank you card for the host. The examiners could be asked to sign the thank you card.
  - Meeting with the examination Diplomates to grade the examination and report the results to the Diplomate Chair.
  - Submitting expenses to the AAO Office for reimbursement approval.
  - See Appendices G&H for more information. More information regarding the practical can be found in the Practical Examination Guide (separate document).
- Create and submit the information abstract about the BVPPPO Diplomate Program and bring the poster to the meeting and post it in the appropriate location. The abstract should be submitted at the same submission window for the scientific abstracts (generally May 1 to May 31).

## Research Diplomate Chair

It is the responsibility of the Research Diplomate Chair to:

- Recruit and screen potential research Diplomate candidates.
- Serve as the contact person for research Diplomate candidates and identify potential candidates.
- Discuss possible paper topics with the candidate and approve the final topic. Assist the candidate in all phases of paper preparation.
- Assemble a research diplomate exam committee depending on the topic of the paper. Distribute the paper to the committee members.
- Arrange and conduct the oral examination with the research diplomate committee.
- Present the committee's final decision regarding the candidate's Diplomate status to the BVPPPO Executive Committee.
- Consult with BVPPPO Executive Committee members (if appropriate) on issues related to BVPPPO Research Diplomate Program (or Diplomate program in general).

## Clinical Diplomate Subcommittee Chairs

(See Appendices G & H for more information)

### Clinical Diplomate Case Reports Chair

It is the responsibility of the Clinical Diplomate Case Reports Chair to:

- Act as the primary contact person for all Diplomate candidates submitting case reports.
- Organize and maintain a record of current Diplomates during the case report process and keep the Clinical Diplomate Chair and Section Chair informed.
- Keep a list of Diplomates who are willing to review cases and areas of interest/expertise (if applicable).
- Review submitted cases and solicit appropriate active Diplomates (2 reviewers per case) to review each case report and ensure timely turnaround on reviews.
- Communicate the standing of each case report to the candidate.
- Provide counsel, support, and resources to candidates to help them achieve successful completion of the case reports while remaining impartial.

### Clinical Diplomate Written Examination Chair

It is the responsibility of the Clinical Diplomate Written Examination Chair to:

- Proctor or arrange for someone to proctor the written examination at the Annual Meeting when necessary.
- Secure the examination and bring copies to the meeting.
- Periodically update the examination to be sure it reflects the candidate guide. Questions can be solicited from experts in the field.
- Grade the examinations and inform the Clinical Diplomate Chair of the results, stressing areas of concern that should be covered by the oral committee.

### Clinical Diplomate Oral Examination Chair

It is the responsibility of the Clinical Diplomate Oral Examination Chair to:

- Select an appropriate panel for the oral examination at the Annual Meeting as necessary.
- Provide the panel members with the case reports and practical examination results and communicate any areas of deficiency to be covered on the oral examination to the panel members.

## VII. Committees & Other Positions

### Program Chair

The BVPPPO Section Chair appoints the Program Chair for a 2-year term. The maximum consecutive number of years a person can serve as Program Chair is 8.

- Requirements for Program Chair:
  - FAAO and membership in the BVPPPO section are required.
  - Diplomate status is not required.
- The primary duty of the Program Chair is to assist section leadership in the implementation of the BVPPPO Section Symposium. The Program Chair will:
  - Be the primary contact to whom section members should submit symposia ideas.
  - Be responsible for informing symposium speakers of honoraria, submission deadlines, etc., including helping them fill out forms.
  - Present the planned symposium topic and speakers to the Section leadership.
  - Coordinate with another section, if a joint symposium is planned.
  - As delineated below: following approval of the symposium topics, speakers and budget by the Section, the Program Chair will:
    - Complete the Symposium Submission and submit it to AAO Office and lecture/workshop submission portal by deadline determined by AAO Office (See Appendix J. Section Symposia Policy). This submission includes title and short general description of that years' symposium, confirmed speakers, and budget.
    - Submit full lecture outline of symposium (3 pages) and course description and learning objectives, Speaker CVs to AAO office by deadline determined by AAO Office.
    - Attend any required meetings at the Annual AAO Meeting.
- Symposia are developed in line with goals set forth in the Research Pillar Goals of the AAO Strategic Plan, "Promote Section/SIG symposia that are co-sponsored, contain cutting-edge research, include speakers from outside the Academy, and foster active exchange between clinicians and scientists." Symposia topics should reflect research that is current and relevant to the section members in the area of binocular vision, perception, and pediatric optometry (See Appendix I: Prior Symposia Topics). Symposia are 2 hours and may be comprised of 3-5 expert speakers. (See Appendix J: Section Symposia Policy). Each symposium should have a designated contact person and moderator(s) (the role may be the same or different people).

### Member Relations Committee

- Members serve for 2-year terms.

#### *Committee Goals:*

- Communicate regularly with Section membership and/or Diplomates regarding Section activities and projects. This occurs through quarterly newsletters, social media, and other means. The timeframe of the quarterly newsletter is:
  - Pre-Academy meeting (1-2 months prior to Academy meeting)
  - Post-Academy meeting (1-2 months after Academy meeting)
  - Spring (March or April)
  - Summer (July)
- Keep roster of active Diplomates and keep it consistent with AAO staff responsible for database.

- Facilitate a post-Academy member survey each year and collate responses to aid in improving Section events and communication before and during the Academy meeting.
- Coordinate effort of the Section to convert Section members to Diplomate candidates.
- Maintain and distribute a directory for the executive committee and volunteer structure, with updated contact information. Distribute the directory to section membership after the Annual Meeting.
- Coordinate effort to engage current members encourage volunteering in Section opportunities (e.g., case discussion forum, journal club).
- Recruit future members by engaging current Peds/VT residents and students who are interested in Peds/VT residencies (e.g., student and residency coordinator mixer at Academy meeting).
- Michelle Edwards handles all of the section communication. Correspond with Michelle Edwards to send out emails to the section members regarding the section events and other communication when necessary (e.g., publicity for Diplomate Preparatory Course (DPC) if offered).

*Organizational Structure:*

- 1 chair
- 2-3 members

It is the responsibility of the Member Relations Committee Chair to:

- Create an action plan for the Committee post-Academy meeting on a yearly basis.
- Ensure that the items in the action plan are carried through by the date of expected completion.
- Obtain approval from Section Chair on all communication to Section members.
- Arrange and lead quarterly conference calls with committee.

## Appendix

### Appendix A – Sample Section Chair’s Report

#### AAO Annual Section and SIG Report BVPPPO 2017

Please fill out the information below, regarding current leadership, business and communication over the last year (culminating with the most recent annual meeting). Any sections which are *not applicable*, can merely be left blank. Please return this document to your Board liaison.

Date of completion	12/14/2017				
Section/SIG Name	Binocular Vision Perception & Pediatric Optometry				
Officers Where applicable, please list in the name and email of individual officers of the Section/SIG.	Officer Name		Officer Email		
Chair	John “JT” Tassinari		jtassinari@westernu.edu		
Immediate Past Chair	Carmen Barnhardt		cbarnhardt@ketchum.edu		
Vice Chair	Marie Bodack		mbodack@sco.edu		
Diplomate Chair	Christine Allison		callison@ico.edu		
Diplomate Vice-Chair	Catherine Chiarelli		catherinechiarelli@rogers.com		
Diplomate Case Reports	Angela Chen		angelachen@ketchum.edu		
Diplomate Written Exam	Catherine Heyman		cheyman@ketchum.edu		
Diplomate Practical Exam	Duty of Diplomate Vice-chair		catherinechiarelli@rogers.com		
Diplomate Oral Exam	Mitchel Scheiman		mscheiman@salus.edu		
Research Chair	Mark Rosenfield		mrosenfield@sunyopt.edu		
Program Chair	Tawna Roberts		troberts@optometry.uh.edu		
Diplomate Recruitment	Stan Hatch		shatch@salus.edu		
Member Relations	Ron Gall		ron@oakvillecentreforvision.com		
Other Leadership Positions (add rows as necessary)					
Diplomates If applicable, please include information regarding new diplomates, and estimates	Type	# new this year	Names of those new this year	# “early” in process	# “mid-way” or further in process
	Clinical	3	Macarena Baca Cara Frasco Erin Jenewein	5	2
	Research	0		3	1

of those in process.					
Diplomate Preparation Course If applicable, please provide attendance and overview of any Diplomate prep course/activities undertaken this year/at the last Annual Meeting.	We provided a 3 – hour hands-on workshop at ICO clinic that was intended to be instructive for taking our practical exam. We also provided a 1-hour workshop on case report writing which included a review of candidate’s current case reports. Attendance, I do not have that info at this time. I believe it was around 10 attendees. All expressed that they profited from attending. This low turnout prompted a discussion in which we decided to plan a DPC within the ordinary CE program.				

Symposium provided for the LAST Annual Meeting If applicable, please provide the title, speakers, date, and any other relevant information regarding any symposia held at the LAST Annual Meeting.	This was a joint symposium with Low Vision. The collaboration was great and the speakers made it relevant to both sections. Title Cortical/Cerebral Vision Impairment (CVI): An Overview of the Attributes, Range of Clinical Presentation, Research Findings, and Challenges to Rehabilitate and Educate this Burgeoning Population. Speakers Barry Kran, OD Lotfi Merabet, OD, PhD, MPH Gordon N Dutton, MD, FRCOphth, FRCS Amanda Hall Lueck, PhD MODERATOR Bruce Moore, OD
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Tentative symposium proposed for the NEXT Annual Meeting You are encouraged to submit ideas for symposia for the NEXT Annual Meeting. Please provide the title, speakers, date, and any other relevant information regarding any tentative symposia you might like to hold at the NEXT Annual Meeting. Final details can accompany the official request.	Visual Information Processing; Testing and Vision Therapy
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Business of Note Please include a description of any important actions or business of note which has occurred over the last year.	<ol style="list-style-type: none"> <li>1. Our completely revised clinical diplomate candidate guide was released.</li> <li>2. We recognized that we have an appreciable number of ODs who are diplomate candidates but have done nothing to move forward and their 5-year application period is close to expiring. We launched a diplomate retention campaign which consisted of email letters and personal phone calls.</li> <li>3. We created a new position called Diplomate Recruitment. This volunteer will take on all tasks related to diplomate recruitment. As 1 example, we are going to reach out to current BV residents to plant a seed of seeking diplomate later. Another example is that</li> </ol>
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	<p>this committee will be in charge of staffing our section presence in the exhibit hall at annual meeting. New diplomate Jenewein appointed to this committee</p> <ol style="list-style-type: none"> <li>4. A system was launched whereby new candidates receive a welcome letter from D chair and also info/letter from their mentor. Integrated into this info is a sample timeline that we hope will let candidates know that 5 years is not that long and it is important to start right away.</li> <li>5. We initiated a review and analysis of our oral exam process. A task force was appointed and they were charged with a list of questions and comments to address. One concrete outcome will be a procedure manual “how to” guide for oral examiners. New diplomate Baca appointed to this task force.</li> <li>6. We have begun the process of writing a procedure manual “How To” guide for case report reviewers. Another document is underway that will be a procedure manual for the case report chair. New diplomate Frasco appointed to assist with these tasks and to assist with case report review process.</li> <li>7. We contributed content and endorsement to a position paper stating that instrument based refractive screening does <i>not</i> provide a visual acuity measurement.</li> <li>8. We collaborated with The National Center for Children’s Vision and Eye Health at Prevent Blindness in a response to “Call for Comments on CHIPRA Electronic Clinical Quality Measure: Vision Screening and Referral in Children”</li> </ol>	
<p>Communication/Newsletters Please include information regarding correspondence sent to your membership.</p>	<p>Date Sent</p>	<p>Brief Summary of topic/reason</p>
	<p>Feb 2017</p>	<p>Section newsletter</p>
	<p>Aug 2017</p>	<p>Email re upcoming BV events in Chicago</p>
	<p>Oct 2017</p>	<p>Email re upcoming BV events in Chicago</p>
<p>Awards provided If applicable, please provide the name of any award you provided this year and the corresponding recipient, including Ezell Fellow.</p>	<p>Name of Award</p>	<p>Name of Recipient</p>
<p>Summary/Highlights Please briefly describe what you see as the highlights of your group and their accomplishments of the last year.</p>	<ul style="list-style-type: none"> <li>• Our 3 new diplomates are high quality ODs and eager leaders.</li> <li>• We created a new position (D Recruitment) and immediately added 2 new diplomates to our leadership team.</li> <li>• One of our positions, member relations, was created with the intent of involving non-diplomate section members in the section. I successfully recruited a sharp non-D member to fill the position in 2018.</li> </ul>	

	<ul style="list-style-type: none"> <li>• Our oral exam has not been scrutinized in a formal way ever. It will be this coming year.</li> </ul>
<p>Goals for next year Please include a description of any <u>potential</u> actions or goals for the upcoming year that you would like the AAO Board to be aware of. This may prime the Board for any future formal request, or they may be able to coordinate activities.)</p>	<ol style="list-style-type: none"> <li>1. Precedent tells us that academia is the prime source of new diplomates. We would like to somehow reach out to faculty and researchers to encourage them to seek diplomate. Can we be present in the culture of more optometry schools? Not to ignore private practice ODs – see below.</li> <li>2. We are redoubling our efforts to reach out to current residents.</li> <li>3. Support/encourage funding for BVP Ezell Fellowship</li> <li>4. Continue the process of creating documents that explain best practices for running the section. New leaders will get up to speed quicker. One document that needs significant work is our section policy and procedure manual.</li> <li>5. More frequent newsletters – at least 3 per year.</li> </ol>
<p>Opportunities for growth or improvement Please include a description of any ideas/ways that you think the AAO or the Annual Meeting could potentially grow, enhance, or improve over the next year, especially as it relates to your group membership.</p>	<p>Why become a diplomate? Does AAO have a good answer to this question? Can AAO make it a “marketable” thing? I am very interested in the integration of diplomate with board certification. Perhaps this linkage will be the answer. Whatever my section can do, please let me know.</p>
<p>Other Please include any other information you feel which might be helpful for the Board to know which has not already been stated.</p>	<p>I sense in my community and in the literature heightened interest in providing timely vision screenings in a pediatrician’s office. While comprehensive eye exams are optimal, the vision screenings are not going away. I think it would be win-win if pediatricians thought of ODs, particularly BVPPO ODs as a resource for training and info on how to perform good vision screenings in a medical home.</p>

## Appendix B – Prior Diplomate Prep Course Topics

Year	Title	Speaker
2015	Beyond the Patch: Management of Amblyopia with Optometric Vision Therapy	Kelly Frantz
	Anomalous Correspondence: Everything You Wanted to Know But Were Afraid to Ask	Rick London
	Exotropia Potpourri	Sue Cotter Angela Chen
	Workshop: Review of EF and AC Procedures and Hands on Review of Vision Therapy Procedures	Carmen Barnhardt
2016	BV Information Processing: Models and Therapy	Len Press
	Disease Masquerading as Visual Dysfunction Requiring Vision Therapy	JT Tassinari
	Grand Rounds: Evaluation of Patients with Strabismus and Neurodevelopmental Disorders	Angela Chen Cathie Heyman
2017	Advanced Strabismus Diagnosis and Treatment	Kelly Frantz
	Visual Information Processing Diagnosis and Treatment	Christine Allison
	Vision Therapy Skills	Kelly Frantz Christine Allison
2018	No Course	
2019	Pediatric Pharmacology for the Anterior Segment	Marie Bodack
	Pediatric Neuro Eye Conditions	Marie Bodack
	Visual Information Professing Diagnosis and Treatment	Christine Allison
	Advanced Strabismus Topics: Correspondence and Esotropia Management	Kelly Frantz
	Advanced Strabismus Topics: Strabismus Diagnosis and Exotropia Management	Erin Jenewein
2020	PPD to 2021	
2021	Non Strabismic Binocular Vision Disorders	Mitch Scheiman
	Pediatric Low Vision	Cathie Heyman
	Cortical Visual Impairment	Rizwana Hissaindeen
	Evidence Based Refractive Prescribing for Young Children	Graham Erickson
	Sensory Adaptations to Strabismus	Kristine Hopkins
2022	Management of Learning Related Vision Problems	Stacey Coulter
	Pediatric Ocular Disease	Stanley Hatch Ann Webber Marie Bodack
	Treatment of Brain Injury	Catherine McDaniel
	Treatment of Strabismus	Bruce Wick

# Appendix C – Budget Form (Provided by AAO)

Supplemental schedule insert additional line as needed						
<b>Travel-</b> Volunteers per diem and travel reimbursement to annual meeting (per policy)						
Chair				750		
Diplomate Chair				750		
Program Chair				500		
Post Meeting Debriefing				350		
Total travel				<u>2350</u>		
Comments:						
<b>Food &amp; beverage-</b> for events						
List events	# of Attendees	Type of event (see drop down menu)	Cost per person	Delivery Fee	Total Cost	
1		none	0	0	0	
2		none	0	0	0	
3		none	0	0	0	
4		none	0	0	0	
5		none	0	0	0	
Total food and beverage					<u>0</u>	
Bartender, if alcohol served					0	
Attendant, if dessert station					0	
Total Cost					<u>0</u>	
Comments:						
<b>Speakers expenses</b>						
Speaker fee and related expenses						
list speakers if available	Honoraria	Expenses	Total cost			
			0			
			0			
Total Speaker Expense			<u>0</u>			
Comments:						
<b>Diplomate Program</b>						
all costs related to the Diplomate program						
Total Diplomate Program			<u>0</u>			
Comments:						
<b>Diplomate Prep Course</b>						
All costs related to the Diplomate Prep Course						
Total Diplomate Prep Course			<u>0</u>			
Comments:						
Total All Costs			<u>2350</u>			
Prep Course Registration Fees	# of Attendees	Registration Rate	Revenue			0
Notes: Audio visuals, conference calls and exam room are covered by the AAO budget						

Hyatt Regency Orlando - Headquarters Hotel						
	Avg Price	Srv Chg 26%	Subtotal	Sales Tax Exempt	Total	
Beverage - Coffee (18 cups per person)	\$110.00	\$28.60	\$138.60	\$0.00	\$138.60	\$139
Beverage - Hot Tea (18 cups per person)	\$110.00	\$28.60	\$138.60	\$0.00	\$138.60	\$139
Beverages - Iced Tea	\$95.00	\$24.70	\$119.70	\$0.00	\$119.70	\$120
Beverages - Juice, Water	\$6.50	\$1.69	\$8.19	\$0.00	\$8.19	\$8
Beverages - Soda	\$6.50	\$1.69	\$8.19	\$0.00	\$8.19	\$8
Breakfast - Buffet	\$55.00	\$14.30	\$69.30	\$0.00	\$69.30	\$69
Breakfast - Plated	\$47.00	\$12.22	\$59.22	\$0.00	\$59.22	\$59
Breakfast Continental	\$37.00	\$9.62	\$46.62	\$0.00	\$46.62	\$47
Dinner - Buffet	\$120.00	\$31.20	\$151.20	\$0.00	\$151.20	\$151
Dinner - Plated	\$98.00	\$25.48	\$123.48	\$0.00	\$123.48	\$123
Lunch - Box	\$51.00	\$13.26	\$64.26	\$0.00	\$64.26	\$64
Lunch - Buffet	\$69.00	\$17.94	\$86.94	\$0.00	\$86.94	\$87
Lunch - Plated	\$59.00	\$15.34	\$74.34	\$0.00	\$74.34	\$74
none	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0
Reception - 1 dessert station	\$28.00	\$7.28	\$35.28	\$0.00	\$35.28	\$35
Reception - 6 Hors d'oeuvre	\$50.00	\$13.00	\$63.00	\$0.00	\$63.00	\$63
Reception - one alcoholic drink	\$10.00	\$2.60	\$12.60	\$0.00	\$12.60	\$13
Reception - 6 pieces per person, one hosted alcoholic drink	\$60.00	\$15.60	\$75.60	\$0.00	\$75.60	\$76
<b>Morning coffee break</b>						
Coffee (18 cups per gallon)	\$110.00	\$28.60	\$138.60	\$0.00	\$138.60	\$139
Hot Tea (18 cups per gallon)	\$110.00	\$28.60	\$138.60	\$0.00	\$138.60	\$139
Juice, Water	\$6.50	\$1.69	\$8.19	\$0.00	\$8.19	\$8
Soda	\$6.50	\$1.69	\$8.19	\$0.00	\$8.19	\$8
Total Coffee Break for 100 people - 2 drinks per person	\$1,320.00	\$343.20	\$1,663.20	\$0.00	\$1,663.20	\$1,663.00
<b>Other service charges</b>						
Delivery fee for less than 50 people	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$182.00
Attendant required for dessert station	\$175.00	\$45.50	\$220.50	\$0.00	\$220.50	\$221.00
Bartender required for alcohol (1 per 100 people)	\$175.00	\$45.50	\$220.50	\$0.00	\$220.50	\$221.00

**HOTEL NOTES**

No delivery fee for smaller groups

Breakfasts - include juice, coffee, hot tea

Lunches (except box lunches) - include iced tea

Dinners - include coffee service

Hors d'oeuvres - 25 piece minimum

Bartenders (1 per 100 guests) - \$175++ per hour, 3 minimum

Appendix E – AAO Volunteer Reimbursement AAO Travel Policy  
(from AAO Guidelines – effective January 2018)

**Effective January 2018**, Annual Meeting registration fees for all members of the committees listed below will be free of charge, and the below table of compensation applied to volunteer reimbursement. Compensation is intended to offset the amount of time the volunteer is unable to attend education at the annual meeting as a result of their volunteer work for the Academy.

Compensation is based on Levels as described below:

- Level 1: Comp registration only
- Level 2: Comp registration + \$500 travel
- Level 3: Comp registration, \$750 travel
- Level 4: Comp registration, \$1000 travel

Volunteer Per Diem Chart

Volunteer Group	Level	Monetary Travel Compensation
AAO BOD	N/A	See BOD Reimbursement Policy
Admittance National Chair	3	750
Admittance National Vice Chair	3	750
Admittance Subcommittee Chair	3	750
Admittance Subcommittee Vice Chair	3	750
Admittance Subcommittee Members	3	750
Awards Committee Chair	2	500
Awards Committee Members	1	0
Communications Committee Chair	2	500
Communications Press Conference Chair	2	500
Communications Committee Members	1	0
Editorial Board, OVS Editor-in-Chief	3	750
Editorial Board, OVS Associate Editors	3	750
Editorial Board, OVS Members	1	0
Education Quality Assurance Committee Chair	0	0
Education Quality Assurance Committee Members	0	0
Exhibits Committee Chair	2	500
Exhibits Committee Members	2	500
Leadership InSight™ Committee Chair	2	500
Leadership InSight™ Committee Members	1	0
Lectures and Workshops Committee Chair	4	1000
Lectures and Workshops Committee Members	4	1000
Maintenance of Fellowship Committee Chair	1	0

Maintenance of Fellowship Committee Members	1	0
Membership Committee Chair	2	500
Membership Committee Members	1	0
Nominating Committee Chair	3	750
Nominating Committee Members	3	750
Research Committee Chair	2	500
Research Committee Members	1	0
Residents Day Committee Chair	3	750
Residents Day Committee Members	1	0
Scientific Program Committee Chair	4	1000
Scientific Program Committee Members	4	1000
Section Chair	3	750
Section Vice Chair	1	0
Section Diplomate Chair	3	750
Section Diplomate Vice Chair	1	0
Section Program Chair	2	500
SIG Chair	3	750
SIG Vice Chair	1	0
*SIG Program Chair (when program)	2	500
AAOF BOD	1	See AAOF BOD Reimbursement Policy
Chapters Committee Chair	1	0
Chapters Committee Members	0	0
Ethics Committee Chair	1	0
Ethics Committee Members	1	0
Faculty-Student Liaison Committee Chair	2	500
Faculty-Student Liaison Committee Members	1	0

1. \*Admittance Committee: Travel reimbursement for the Admittance Committee is the same for North American and non-North American members.
2. \*SIGS: Similar to Sections, SIGS can appoint a program chair if they will have a symposium at the upcoming meeting. The SIG Program Chair would be entitled to receive the same travel reimbursement as the Section Program Chairs.

**American Academy of Optometry**  
**Binocular Vision, Perception and Pediatric Optometry Section**  
Meeting- San Antonio Convention Center Room 007  
Thursday, November 8, 2018 12:00-1:00pm

In attendance: Drs. Christine Allison, Catherine Heyman, John Tassinari, Marie Bodack, Ron Gall, Mitch Scheiman, Graham Erickson, Rachel “Stacey” Coulter, Silvia Han, Stan Hatch, Curt Baxstrom, Melissa Zarn, Valerie Kattouf, Tawna Roberts, Suraj Upadhyaya, Anderw Buzzelli, Bruce Moore, Deborah Orel Bixler, Stacy Lyons, Sarah Miller, Caitlin Miller, Kelly Frantz, Siva Mieyeppen, Erin Jenewein, Jenny Myung, Tina Aldana, Amy Aldrich, Aparna Raghuran, Carmen Barnhardt, Don W. Lyon, Allison Summers, Scott Cooper, Hannu Laukkanen, Tod Leurenz?, Angela Chen, Pete Kollobum (AAO Liasion) - 36 attendees

2017 Section Meeting Minutes & Agenda for this meeting  
Motion for approval (Cathie Heymen) and seconded. Motion passed.

**Section Sponsors, Good Lite and Johnson and Johnson Vision**

Dr Weslie Hamada spoke to the section. J & J is grateful to be a sponsor. Dr. Hamada provided information on the changing focus of J&J: expanding from CLs into eye health and mentioned their new photochromic CL in the exhibit hall. J&J also is involved in research and has a booklet of scientific posters at the AAO.

**AAOF - Ezell BV Scholarship – Dr. Stacy Coulter**

The Ezell Fellowship awards talented post-doctoral students. To endow this scholarship the BVPPPO section must raise money. Last year (2017) was the first year of the scholarship. The scholarship will not be awarded yearly until it is endowed. Doctors can donate honoraria or make other contributions. \$277,000 is needed to endow an Ezell Fellowship for BV/Peds  
\$93,000 has been raised to date, so we need approximately \$184,000.

**Symposium Chair Report, Dr. Tawna Roberts**

The Symposium with the Vision Science SIG worked with the Lasher Foundation to fund speakers for this year’s meeting. A possible topic for 2019 is concussion. If anyone has ideas for future symposia, let Tawna Roberts know. It is important to not discuss payments with potential speakers as the AAO has specific rules about payments.

**Research Diplomate Chair Report, Dr. M Rosenfield**

The research diplomate section met with a candidate yesterday. There is one candidate in the process with others who have expressed interest. Dr. Rosenfield will be reaching out to those who have expressed interest.

**Clinical Diplomate Chair Report Dr. C. Allison**

Two candidates took and passed the practical. One will be taking the oral later today. Dr. Allison thanked Catherine Chiarelli who had served as diplomate vice chair, Dr. Cathie Heymen for help with the written exam, Dr. Mitch Scheiman for his help with the oral exam and Dr. Angela Chen for her work on case reports. The Section will need a new person to take over the written exam. The new Case Reports Chair will be Cara Frasco.

### **Diplomate Case Report Chair Dr A Chen**

Dr. Chen has developed a new manual for case reports. There are currently 5 candidates in the process.

### **Section Vice Chair Report, Dr. M. Bodack**

Revisions were made to manuals to help streamline the process for candidates and examiners. In addition to the case report manual, the Oral Exam Task Force, Eric Borsting Chair, worked on revisions to the process. We will have an informational poster and booth in the Exhibit Hall This year.

### **Election of Officers**

The following were elected to officers of the Section

Section Chair	Marie Bodack, OD, FAAO
Section Vice-Chair	Christine Allison, OD, FAAO
Diplomate Chair	Angela Chen, OD, MS, FAAO
Diplomate Vice-Chair	Ron Gall, OD, MSc, FAAO

### **Section Chair Report, Dr. Tassinari**

- The position of Diplomate Recruitment, previously held by Ron, will be led by Stan and Erin.
- The position of Communications, previously held by Ron, will be led by Vivian Manh and Melissa Zarn.
- Dr. Tassinari recognized all that Mike Rouse did for the Section.
- The Diplomate Prep Course will be held during general education on Friday PM. The topic is advanced strabismus.
- Dr. Tassinari brought up changing the by-laws to have the Case Reports Chair as an Elected 2 year position. Historically, this position has been appointed. There was discussion regarding this topic. Issues brought up included: AAO restrictions on by-laws, loss of flexibility, considerations if person does not want to continue moving up in the section, the diplomate vice-chair may not have the experience of working with case reports and that knowledge may be helpful. The vote did not pass.

Adjourn 1258pm



## Appendix G – Clinical Diplomate Chair Exam Preparation & Procedure Prior to Annual Meeting

### Written Exam Preparation & Procedure

1. In early summer, communicate with Case Report Chair to determine who may be eligible for written exam or close to eligible. Eligibility is 1 case report accepted by July 1 of the year in which written exam is to occur. Extensions to this deadline may be granted at the discretion of the Diplomate Chair.
2. Communicate with eligible Diplomate candidates regarding their desire to take written exam and register them for exam.
3. Inform Section Chair of the number of candidates taking the written exam so that arrangements can be made for a space for the exam. The Section Chair will work with AAO to obtain a room location and time at the AAO meeting site. (Section Chair makes room request). Exam is usually Wednesday afternoon of AAO Meeting week.
4. Communicate with written exam candidates 4-6 weeks before to confirm attendance, inform location and time, and answer questions.
5. The written exam chair is responsible for proctoring the exam or arranging for another proctor.

### Practical Exam Preparation & Procedure

1. The Clinical Diplomate Vice-Chair is responsible for the practical exam. The Clinical Diplomate Chair assists the Vice-Chair in recruiting examiners.
2. Communicate with candidates regarding eligibility and registering them for exam. Eligibility requirements are acceptance of all 5 Case Reports by July 1 of the year in which practical exam is to occur *and* passing written exam. Extensions to this deadline may be granted at the discretion of the Diplomate Chair.
3. This exam requires much preparation and coordination with the exam site (typically a private practice). It is very helpful to determine early in the year if there will be at least 1 Diplomate candidate participating in the practical exam and start setting up the practical exam.
4. Inform candidates the importance of a flexible academy schedule. If the candidate makes other commitments (CE lecture, serve on fellow interview committee etc.), their commitments may conflict with the scheduled time of this exam.

### Oral Exam Preparation & Procedure

1. The Oral Exam Subcommittee chair is responsible for the execution of this exam including selection of the oral examiners.
2. Communicate with Diplomate candidates who are eligible regarding their plans to sit for this exam. Eligibility is all 5 case reports by July 1 of the year in which oral exam is to occur, passing written and practical examinations.
3. Work in coordination with Oral Exam subcommittee chair to schedule time and location. Time is usually Thursday or Friday of AAO Meeting week. (Section Chair makes room request).
4. Provide Oral Exam Subcommittee Chair the “suggestions for oral” comments generated by the case report reviewers. This document should be prepared by the case report chair. Make sure the full case reports and reviewer feedback available to oral exam committee. Also provide any other feedback from written and practical exams that may have been taken at previous AAO meetings.
5. Inform candidates the importance of a flexible academy schedule. If the candidate makes other commitments during AAO week (CE lecture, serve on fellow interview committee etc.), their commitments may conflict with this exam.

## Appendix H – Clinical Diplomate Chair Responsibilities & Exam Procedures at the AAO Meeting

### Contact Information

1. Obtain contact information for all candidates, including hotel room number. Keep in mind that international candidates may not have cell phone capability.
2. Obtain contact information for the following Diplomate Exam Subcommittee Chairs
  - (1) Written Exam Chair
  - (2) Practical Exam Chair (Clinical Diplomate Vice-Chair)
  - (3) Oral Exam Chair

### Written Exam

1. Arrange for the Written Exam Chair to score the exams before the practical and then deliver results to you. Written Exam Chair provides an item analysis of candidate performance by topical area. Provide the Oral Exam Chair this information.
2. Communicate Exam Results
  - (1) Meet with each candidate in person, if possible, to relay results\* of the exam. For those who do not pass, the feedback should be as specific as possible to guide study toward a repeat exam. This feedback should be in person then a written feedback summary provided within 2 weeks of meeting's end.
  - (2) For candidates taking subsequent exams at the AAO meeting, immediately inform the chairs (practical and oral) that candidate does or does not qualify for next exam.
  - (3) If candidate is scheduled for oral exam, inform the Oral Exam Chair of the candidate's weaknesses on the written.

For those candidates who are not taking subsequent exams at that AAO meeting, construct a file on their written exam performance to save for reference for a future practical / oral exam.

\*The purpose of relaying the results of any of the 3 exams is to give the candidate a chance to raise their level of expertise and anticipate future questions in areas identified as weak. This anticipation will guide their study. Questions about their weak areas will likely arise at the oral and perhaps at the practical. The Diplomate Chair should provide specific enough information to aid the candidate. A drawback to this process may arise if the Diplomate Chair is too specific and the candidate challenges the test question(s). Never show the exam to a candidate.

### Practical Exam

1. Join the practical exam team if possible and work under the direction of the Clinical Diplomate Vice Chair.
2. Obtain results of the practical exam and promptly relay to candidate in person with feedback. For those who do not pass, this information needs to be as specific as possible to guide preparation for a repeat practical exam. In addition to a personal meeting, prepare a written document and send within 2 weeks of meeting's end.
3. For candidates planning to take the oral at that AAO meeting, immediately relay to the Oral Exam Chair whether candidate does or does not qualify for the oral exam with information regarding candidate's strengths and weaknesses.
4. For those who are not taking the oral exam at that meeting, construct a detailed file of their performance for future reference.

## Oral Exam

1. Join the oral exam team as a fair silent witness (who does not ask candidate any questions).
2. Be present when oral exam team discusses candidate performance. Summarize their comments in terms of strengths and weaknesses and provide this feedback to candidate.
3. Immediately inform candidate regarding outcome of oral exam. For those who do not pass, provide verbal feedback in person and provide a written feedback document within 2 weeks of meetings end.
4. Inform Section Chair of candidates who pass the oral. Section Chair arranges for the candidate to be recognized as a new Diplomate including an announcement at the banquet.
5. Bring a Diplomate ribbon to the Section Reception and personally deliver to new Diplomate(s). Section Chair will announce successful Diplomate candidates.

## Other Responsibilities and Tasks at AAO Meeting

1. Arrive at the meeting with a working knowledge of all candidates in the process and try to meet in person. Pay particular attention to those that still need a mentor and try to make a match at the meeting. The Section Reception is a good time and place for these connections.
2. Deliver a report at the section officers meeting (usually informal and early in AAO week) to give an overview of the status of the candidate pool.
3. Deliver a report at the Section Business Meeting. Keep in mind that candidates or potential candidates will be in the audience at this meeting. Provide general information about the process and acknowledge and thank all of the exam subcommittee chairs.
4. Represent the section at the Diplomate Prep Course and review the process with attendees. Generally, a PowerPoint presentation has been given.

## Appendix I – Prior Symposia Topics

Year	Location	Sponsored by	Topic
2022	San Diego	BVPPO	Visuomotor, Oculomotor, and Sensory Deficits in Amblyopia and Strabismus: Newest Discoveries
2021	Boston	BVPPO and Public Health Sections	Diversity, Equity and Inclusion in Pediatric Eye Care
2020	Virtual	BVPPO Section	It's 2020 How Refraction Changes Lives
2019	Orlando	BVPPO Section and Ocular Nutrition SIG	Beyond Basics: Vision Disorders and Wellness Factors in Patients with Concussion
2018	San Antonio	BVPPO Section and Vision Science SIG	Lasker/IRRF Amblyopia Initiative – Where We've Been, Where We Are, and Where We're Going
2017	Chicago	BVPPO and Low Vision Sections	Cortical/Cerebral Vision Impairment (CVI): An Overview of the Attributes, Range of Clinical Presentation, Research Findings, and Challenges to Rehabilitate and Educate this Burgeoning Population
2016	Anaheim	BVPPO Section	Dealing with Today's Visual Demands
2016	Anaheim	Vision Science and BVPPO Sections	Restoring Impaired Binocular Vision Function
2015	New Orleans	BVPPO Section	ARVO/AAO Joint Symposium: Visual Neural Plasticity: Cells to Systems
2014	Denver	BVPPO and Public Health Sections	Affordable Care Act (ACA)
2013	Seattle	BVPPO Section	Management of Adult Strabismus: Controversies & Conundrums
2012	Phoenix	BVPPO Section	Demystifying Vision in Autism
2011	Boston	BVPPO Section	Pediatric Ocular Disease Symposium I
2011	Boston	BVPPO and Disease Sections	Pediatric Ocular Disease Symposium II
2010	San Francisco	BVPPO Section	Management of Refractive Error in Children
2009	Orlando	BVPPO Section	Intermittent Exotropia: What do we know? What do we need to know?
2008	Anaheim	BVPPO Section	Case management of refractive error in preschool children: Can we agree?
2007	Tampa	BVPPO Section	Myopia: A Look into the Future
2007	Tampa	BVPPO Section	Visual Attention, Magnocellular Deficits, and Reading Disability
2006	Denver	BVPPO Section	Computerized Applications in Visual Efficiency and Processing Disorders
2006	Denver	BVPPO Section	Traumatic Brain Injury: A New Challenge for Optometry, Neuro-optometric Rehabilitation, and Our Nation
2005	San Diego	BVPPO Section	Primary Health Care for Special Populations
2005	San Diego	BVPPO Section	Current Concepts in Vision Care for Athletes
2004	Tampa	BVPPO Section	New Advances in Acquired Brain Injury

2004	Tampa	BVPPO and Public Health Sections	Why Mandatory Eye Examinations For Children?
2003	Dallas	BVPPO Section	Current Concepts in Oculomotor Disorders
2003	Dallas	BVPPO Section	Current Concepts in Learning Related Vision Problems

## Appendix J – AAO Guidelines for Symposia Held at the Annual Meeting (effective January 2021)

Symposia are an integral part of the Academy's Annual Meeting. This document provides guidelines for the planning, development, and execution of Section and Special Interest Group (SIG) sponsored symposia.

Each Section is required to submit one symposium proposal for the upcoming Annual Meeting. SIGs are also encouraged to submit proposals. Sections and SIGs can partner to program joint symposia and are encouraged to do so.

### **Section- & SIG-sponsored Symposia Guidelines**

As noted in the current Strategic Plan, the Academy promotes Section/SIG symposia that are co-sponsored, contain cutting-edge research, include speakers from outside the Academy, and foster active exchange between clinicians and scientists. These special events highlight current topics of interest to the Section's/SIG's area of focus.

#### **Length of Program**

Although often described as a 2-hour symposium, the actual time allotted for each symposium is 1 hour and 40 minutes (100 minutes). The time needed for the introduction, changing between speakers, and a question and answer time or a panel discussion, if desired, should be considered when deciding the number of speakers to invite.

A Section or SIG may not hold more than one symposium during the hours of 8 am - 5 pm, including a symposium that is co-sponsored by another Section/SIG. However, on occasion and by request of Section/SIG leadership, the Annual Meeting Chair may approve an evening symposium regardless of whether or not the Section/SIG is holding or co-sponsoring a daytime symposium.

#### **Submission Procedures & Timeline**

All items should be submitted to the Academy Vice President, Education & Professional Relations, and the Annual Meeting Chair by the following deadlines:

Proposal form by February 2

- Title
- Brief general description of symposium
- Confirmed speakers
- Program budget (as part of the Section/SIG's yearly budget process) submitted to the Academy's Finance Director – deadline to be determined

Submittal to Lectures & Workshops program by February 1  
(Section/SIG Symposia is a separate selection in the submission)  
This would include final outline, CVs of all speakers.

#### **Honoraria/Travel Expense Reimbursement**

Optometrist and non-optometrist Academy Fellows receive honoraria and reduced registration according to the Lectures & Workshops program guidelines - \$400/lecture hour divided by the number of optometry

speakers. Guest speakers who are not Academy Fellows or optometrists may receive honoraria of up to \$1000 (amount determined by the Section/SIG Program Chair with final approval by the Annual Meeting Chair), advance purchase economy airfare, ground transportation to and from airport, 1-2 nights at the Annual Meeting headquarter hotel (if needed), 1-2 days per diem based on the GSA rate in the host city.

An honorarium request for more than \$1000 needs to be approved by the Annual Meeting Chair.

Presenters who need hotel accommodations book their own hotel rooms with their own credit card and the Academy will reimburse them after the meeting for their room costs for 1-2 nights.

Speaker agreement letters that include honoraria amounts and travel expense reimbursement details are sent to the speakers by the Academy's VP, Education & Professional Relations, with a request to return a signed copy. Honoraria and travel expense reimbursements are made within 30 days of receipt of the request for reimbursement.

### **Continuing Education**

The Academy office submits all symposia to COPE and CE Broker for continuing education approval.

## Appendix K – ARVO/AAO Symposium Policy

**Purpose:** The purpose of the ARVO/AAO Joint symposium is to promote an active information exchange between researchers and clinicians on recent developments having clinical importance in the near and long term.

**Format:** An annual 2-hour symposium with three to five invited speakers, held annually at the American Academy of Optometry Annual Meeting. The symposium organizers are also encouraged to work with the Scientific Program Committee to develop a session of submitted papers related to the symposium topic.

**Eligibility:** All American Academy of Optometry Sections, Special Interest Groups, and the Research Committee are eligible to submit topics for consideration.

**Support:** ARVO will advertise the symposium in its newsletter, on its website, and in Annual Meeting promotional materials. The Academy and the section/research committee receiving approval for the symposium will advertise the symposium in the newsletter, on its website, and in Annual Meeting promotional materials. The Academy will provide the meeting room, audio-visual support and position the symposium within the meeting to attract both clinicians and researchers.

**Leadership/Responsibility:** The Symposium Chair will be the section or SIG chair or chair of the Research Committee whose section or committee submitted the proposal accepted for presentation. The Symposium Organizer may be the Section/SIG Chair, or may be someone designated by the Section/SIG Chair. The Chair of the Academy's Scientific Program Committee or the Academy Senior Director, Programs, will serve as contacts for the Section/SIG chairs and Research Committee chair for information and guidance. ARVO will appoint an individual to serve as the ARVO/AAO liaison.

**Funding:** As designated in the ARVO Travel Policy, ARVO will cover the costs of up to five invited speakers who are not Academy Fellows, for up to two nights of per diem and hotel stay at the meeting headquarters hotel. Speakers who are not ARVO members are covered by the Academy policies for funding speakers at section symposia.

**Topic Selection and Timeline:** Section/SIG chairs and/or Research Committee chair wishing to submit a topic for consideration must begin planning the symposium at least 18 months prior to the Academy Annual Meeting at which the symposium will be presented. Proposals are due to the Scientific Program Committee Chair by 15 months prior to Annual Meeting. Proposals must contain a description of the focus of the proposed program and a tentative list of speakers. Organizers of the proposed symposia are encouraged to have made preliminary contact with a few proposed speakers, without guaranteeing that this proposal will be selected.

The Scientific Program Committee Chair will review the proposals, and select one to put forward to the Academy Board of Directors Liaison to the Scientific Program Committee, who then will bring the proposed topic to the Board of Directors for consideration at the subsequent face-to-face meeting.

Following selection by the Board of Directors, the Symposium Chair must confirm all speakers and get prior approval; the final proposal is then reviewed by the Board at the Board meeting at Annual Meeting year prior.



Upon approval by the Academy Board of Directors, the Academy Senior Director, Programs, will send notice of the approval to the appropriate Section/SIG Chair or Research Committee chair, to the Scientific Program Committee Chair, and to the ARVO Executive Director for that organization's review and approval.

Once approved by ARVO, and not later than 10 months prior to Annual Meeting, the ARVO/AAO liaison will notify the Academy Senior Director, Programs, and Scientific Program Committee Chair that the proposal has been approved. The Senior Director, Programs will inform the Section/SIG or Research Committee Chair, as appropriate, of the approval.

**Implementation:** The Symposium Chair will send all speaker contact information, as well as all travel expense agreements worked out with speakers, to the Academy Senior Director, Programs. That staff member will send out "agreement" letters to the participants announcing acceptance of the symposium and reminding them of the dates. Along with this letter, the appropriate travel policy (ARVO or AAO, depending on the speaker's affiliation) will be sent. The letter will also contain an outline of the entire symposium, and will include permission to audiotape the session, audio/visual equipment information, conflict of interest policy, and copyright information. The letter will also indicate that the Symposium Chair or representative will be in touch with the speakers by email on a regular basis in the months leading up to the Annual Meeting.

Because of the significant nature of the Symposium, it is very important that the Symposium Organizer keep the Section/SIG/Research Committee Chair informed about the status of the Symposium. The Section/SIG/Research Committee Chair will be responsible for working with AAO staff to make the Symposium room reservations, request audio/visual needs and help organize the promotion of the Symposium. The Chair will also assist with facilitating communication about the Symposium with other sections and the Lectures & Workshops Committee.

**Termination:** ARVO or the AAO may suspend or terminate their support of the ARVO/AAO Symposium by timely notification. Since final planning for the next Symposium occurs at the Annual Meeting preceding the Symposium, notification of the desire to suspend or terminate the program should be given to the other party at least one year in advance.

Timeline Summary (dates will be reviewed annually and may be changed based on the timing of the Annual Meeting and scheduled meeting dates of the Academy Board of Directors):

**18 months out:** Academy Senior Director, Programs, sends reminder to all Section/SIG chairs and the Research Committee Chair, providing guidelines and the format for submitting proposals.

**15 months prior to symposium being conducted:** Proposals are due to the Scientific Program Committee Chair.

**14 months prior:** Scientific Program Committee Chair selects proposal to recommend to the Board; forwards to committee Liaison to the Board.

**Subsequent Board Meeting:** Board considers and votes on proposed program.

**Prior to Annual Meeting Board Meeting:** Final program and confirmed speakers submitted for Board consideration.

**Annual Meeting Board Meeting:** Board approval of final program for following year Symposium.

**Two months after Annual Meeting:** ARVO response/approval due to Academy Senior Director, Programs, and Scientific Program Committee Chair