

# SUBMISSION GUIDE

ASOA Practice Management Course Submissions:  
August 26 - October 20, 2019

## TABLE OF CONTENTS

|   |         |
|---|---------|
| 1. Important Dates  | Page 2  |
| 2. General Information  |         |
| a. Overview   | Page 3  |
| b. Financial Interest   | Page 3  |
| c. CE Credit for Speakers   | Page 3  |
| d. Know Your Audience   | Page 4  |
| e. Handouts   | Page 4  |
| f. Scheduling   | Page 4  |
| g. Room Setup and Audiovisual   | Page 4  |
| h. Annual Meeting Registration and Expenses   | Page 4  |
| 3. Presenter Guidelines   |         |
| a. Accreditation Statement  | Page 5  |
| b. Educational Objectives   | Page 5  |
| 4. Abstract Submission Process  |         |
| a. Knowledge Pathways   | Page 6  |
| b. Course Level   | Page 6  |
| c. Course Title   | Page 6  |
| d. Course Description   | Page 6  |
| e. Course Learning Objectives   | Page 7  |
| f. Sample Course Description and Learning Objectives  | Page 7  |
| g. Peer Review Process  | Page 8  |
| h. Non-Acceptance   | Page 8  |
| i. Disclosure of Unapproved/Off-Label Use   | Page 8  |
| j. Copyright Assignment Statement   | Page 9  |
| k. Submission Checklist   | Page 9  |
| 5. Begin Your Abstract Submission   |         |
| a. Step 1: Financial Interest Disclosure and ASCRS Faculty CME Review Requirements & Completion | Page 10 |
| b. Step 2: Submit Your Abstract   | Page 11 |
| c. Step 3: Print Your Submission  | Page 11 |
| d. Notification of Submission Status  | Page 11 |
| e. Submission Withdrawals   | Page 11 |

## IMPORTANT DATES

|                   |  |
|-------------------|--|
| August 26, 2019   | Submission site for ASOA practice management courses open<br>2019/2020 Financial Interest Disclosures and ASCRS Faculty CME Review site open |
| October 20, 2019  | Deadline for ASOA practice management course submissions<br>Deadline for Financial Interest Disclosures and ASCRS Faculty CME Review         |
| December 20, 2019 | ASOA submission status notifications are sent via e-mail to lead instructor  |
| February 3, 2020  | ASOA Annual Meeting Online Program Available   |
| April 7, 2020     | Deadline for speaker registration  |
| May 4, 2020       | Deadline for COE Exam Registration<br>Deadline for electronic ASOA Practice Management course handouts                                       |
| May 15, 2020      | ASOA Pre-Conference Deep Dives*  |
| May 16-19, 2020   | ASOA Annual Meeting  |

\* Separate registration required

## GENERAL INFORMATION

**SUBMISSION DEADLINE: OCTOBER 20, 2019**  
**ELECTRONIC HANDOUT DEADLINE: MAY 4, 2020**

### OVERVIEW

The American Society of Ophthalmic Administrators (ASOA) strives to provide the highest quality continuing education to administrators, practice management staff, and the ophthalmic community. ASOA welcomes course submissions that promote this goal and meet the educational needs of attendees. Presenting at the Annual Meeting provides national recognition and exposure as well as the opportunity to share best practices and ideas with colleagues.

ASOA gives strong preference to submissions from its members and to material that has not been presented elsewhere. Course submissions are limited to eight (as the lead instructor) per consulting company. As a result of attendee feedback, the 2020 Program Committee will be actively seeking submissions from administrators presenting alone, as part of a panel, or in conjunction with a consultant. The 2020 Program Committee will also take into account prior year course evaluations completed by attendees and reviewed by the ASOA Board of Directors, Program Committee, and ASOA staff.

Unless otherwise approved, all courses will be 60 minutes in length. If more time is needed, please enter the course twice as parts one and two. Instructors must arrive on time and end at the designated time. If an instructor fails to appear for a presentation without notifying ASOA in advance, or has not provided the required handout, he/she may not be eligible to submit for future meetings.

### FINANCIAL INTEREST

All instructors and faculty members must provide full financial interest disclosure to submit courses for consideration. See page 10 for details.

### CE CREDIT FOR SPEAKERS

ASOA designates this activity for a maximum of 18 COE Category C credits. Individuals should only claim credit commensurate with the extent of their participation in the activity.



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## **KNOW YOUR AUDIENCE**

Although ASOA Annual Meeting attendees are primarily ophthalmic administrators and practice managers, the audience may include attendees from other professional backgrounds including ophthalmologists, optometrists, technicians, nurses, clinical managers and staff involved in marketing, human resources, accounting/billing, and front-desk operations.

## **HANDOUTS**

If your course is accepted, you will be required to submit an electronic handout no later than May 4, 2020. Handouts will be available online and in the conference app. Instructions and information about the format for course handouts will be included in the presentation acceptance letter. **Failure to provide a handout will impact the course evaluation and may be cause for non-acceptance of future submissions.**

## **SCHEDULING**

Programming is scheduled in one-hour segments. If your course requires more than 60 minutes, you should submit two sessions and give your presentation as parts one and two. By your submission you are agreeing to be available to present at any time during the Annual Meeting.

## **ROOM SETUP AND AUDIO VISUAL**

All session rooms will be set with theater-style seating, a head table with 4 chairs, and with the following AV equipment provided: wired microphones for the podium and table, one clip on lavalier microphone, wireless slide advancer, LCD projector, screen, and laptop computer. Submitters must contact ASOA and request any changes to the stated set up, including additional head table seating, wireless microphones, or flipcharts.

## **ASOA ANNUAL MEETING REGISTRATION AND EXPENSES**

Presenters working in the field of ophthalmology must register and pay to attend the Annual Meeting. All travel and hotel expenses are the responsibility of the presenter. As submitter, you are responsible to communicate all requirements and deadlines to co-presenters.

## PRESENTER GUIDELINES

Abstract submissions for the ASOA Program must take place through the online submission portal (see page 10 to begin your submission).

### ACCREDITATION STATEMENT

The American Society of Cataract and Refractive Surgery is accredited by the Accreditation Council for Continuing Medical Education (ACCME) to provide continuing medical education for physicians. ASCRS takes responsibility for the content, quality, and scientific integrity of the CME activity. As the ASOA Program is provided in conjunction with the ASCRS program the same applies to the ASOA program.

All submissions are subject to the ACCME guidelines regarding independence and validation of content. Instructors/authors/producers are responsible for ensuring that (1) all recommendations involving clinical medicine presented are based on evidence that is accepted within the profession and (2) all scientific research referred to, reported, or used conforms to the generally accepted standards of experimental design, data collection, and analysis. Recommendations, treatments, or manners of practicing medicine that do not comply with the above, are known to have risks or dangers that outweigh the benefits or are known to be ineffective in the treatment of patients will not be accepted.

### EDUCATIONAL OBJECTIVES

At the conclusion of the program, ASOA Annual Meeting attendees will be able to:

- Discuss various aspects of business management and integrate adjustments to practices as necessary.
- Describe and implement adjustments to policies and procedures related to human resource management.
- Assess leadership qualities and practices and apply concepts.
- Evaluate current practice marketing campaigns and efforts and recommend improvements where possible.
- Describe advancements in electronic health records and health information technologies.
- Summarize the latest compliance and coding updates.

# ABSTRACT SUBMISSION PROCESS

## KNOWLEDGE PATHWAYS

The Annual Meeting is organized by functional pathways. Each pathway corresponds to a position or common division of responsibilities within an ophthalmic practice. When completing the course submission, please identify the appropriate pathway.

- Advanced Administrator
- Business Management
- Coding & Billing
- EHR & Health Information Technology
- Human Resources
- Leadership & Strategic Management
- Marketing & Business Development
- Risk Management and Compliance
- Sub-Specialties (Ambulatory Surgery Center, Optical, Retina, Cosmetics, Hearing, etc.)

## COURSE LEVEL

Indicate if the course material is introductory or experienced.

## COURSE TITLE (limited to 10 words)

The title should concisely reflect the content of the course. For CME purposes, product/trade names cannot be used in the title. Generic descriptors are required. Titles with product/trade names may be rejected. Titles should follow title case rules and may be edited by ASOA staff.

## COURSE DESCRIPTION (limited to 50 words)

The course description will be used in the final program (subject to editing) and will be the basis on which attendees select their sessions. Keep the reader in mind and explain the content of the course and what the audience will learn. Begin your course description with the words “This course will. . .”

## **COURSE LEARNING OBJECTIVES**

Together with the description, the learning objectives will be used by the Program Committee to review and rate the submission. Please provide two to three specific objectives that define what the attendee can expect to learn from the course. Well-written objectives are action-oriented and can be observed and measured. Learning objectives should **NOT** be a re-statement of your course description but should add new information to enhance the Program Committee's understanding of your planned presentation.

Learning objectives should serve as a completion to the sentence "At the end of this course, attendees will be able to..."

*Example of poorly worded objectives:*

- Teach a course about practice marketing and competition
- Understand managed competition

*Example of appropriately worded objectives:*

- Design a basic practice marketing plan
- Define managed competition

## **SAMPLE COURSE DESCRIPTION AND LEARNING OBJECTIVES**

**Title:** Compliance Dilemmas

**Instructors:** Alan E. Reider, MPH, JD; Donna M. McCune, CCS-P, COE, CPMA, FASOA

**Course Description:** This course will present a series of case studies examining compliance issues and the potential attention paid to them. Instructors will present an interactive session designed to assist administrators with the challenge of staying current with changing regulations.

**Learning Objectives:** At the end of this course, attendees will be able to:

- Identify possible reimbursement issues under scrutiny
- Develop a plan to evaluate and correct problems
- Discuss the legal approach to cope with compliance issues





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## **PEER REVIEW PROCESS**

All submissions will be peer-reviewed by the ASOA Program Committee and should align with ASOA educational objectives. As a result of attendee feedback, the 2020 Program Committee will be actively seeking submissions from administrators presenting alone, as part of a panel, or in conjunction with a consultant. The 2020 Program Committee will also take into account prior year course evaluations completed by attendees and reviewed by the ASOA Board of Directors, Program Committee, and ASOA staff. Submissions will be graded on content and quality and will be accepted based on ASOA creating an overall balanced program.

## **NON-ACCEPTANCE**

- Abstract submissions that are commercially biased will not be accepted.
- If the instructor/faculty did not present his/her scheduled presentation the previous year and did not follow the withdrawal guidelines, the submission will not be accepted.
- If the submission information has been published or presented elsewhere, the submission may not be accepted.
- If the lead instructor/faculty have not completed their individual Financial Interest Disclosure by Sunday, October 20 the submission will not be accepted.
- Abstract submissions that exceed the limit of submissions per consulting group (eight as lead instructor) will not be accepted.

## **DISCLOSURE OF UNAPPROVED/OFF-LABEL USE**

If a presentation concerns the use of a drug or device that has not been approved by the U.S. Food and Drug Administration or concerns off-label use of a drug or device approved by the FDA for other use, this must be disclosed during the presentation.

## **COPYRIGHT ASSIGNMENT STATEMENT**

By my signed acceptance of the terms and conditions of this agreement, and in consideration of the opportunity to speak and present my work at the ASOA Annual Meeting, I hereby grant the American Society of Ophthalmic Administrators, a division of the American Society of Cataract and Refractive Surgery (the “Societies”), a royalty-free, perpetual worldwide license to copy, reproduce, film, distribute and/or sell the work in any media or format in connection with the Annual Meeting or sale or other distribution of materials, as well as authority to use my name, likeness, photograph, and biographical data in connection with its use and promotion of the works. I understand that I will receive no royalty or other monetary compensation from the Societies for this license of rights and the use of my works by the Societies in connection with the Annual Meeting. ASCRS and ASOA will not use the works for any purposes unrelated to the Annual Meeting or sale/distribution of Annual Meeting materials without my written permission prior to use.

The Societies understand and agree that the above grant of rights does not constitute a transfer of copyright and that I remain free to present the materials or revised versions thereof elsewhere for any purposes. I represent and warrant that the works are my own original work or that I have obtained all necessary permissions and authorizations from all individuals or entities that may otherwise have a right, title, or interest in the works; that I have full right and power to make this license; that the works do not violate any copyright, proprietary or personal rights of others; and that the works are factually accurate and contain no matter libelous or otherwise unlawful. I further agree to indemnify and hold harmless the Societies and their respective officers, directors, employees, and volunteers from any and all claims of copyright infringement made against the Societies and arising out of the work and my presentation of the work at the Annual Meeting.

## **SUBMISSION CHECKLIST**

- ✓ Notify all faculty members that they must complete the Financial Interest Disclosure and Faculty CME Review by October 20, 2019. Faculty cannot be added to the course submission until the disclosures are completed.
- ✓ Confirm the valid e-mail address of each faculty member before starting the online submission process.
- ✓ Confirm that the title is entered in title case, is 10 words or less, and does not include product/trade names.
- ✓ Confirm that the learning objectives are formatted correctly.
- ✓ Contact ASOA to request any changes to the stated room and AV setup by the deadline noted in the presentation acceptance letter.

## BEGIN YOUR ABSTRACT SUBMISSION

Online abstract submission is open from August 26 to October 20, 2019.

Please read the following instructions carefully before completing the submission.

**Step 1:** All participants in a position to control the content of this CME activity—instructors and other faculty—must disclose their financial interests. Failure to complete this form by Sunday, October 20 will result in disqualification from participation in this CME activity (**see next page to complete**).

### FINANCIAL INTEREST DISCLOSURE REQUIREMENTS

As an accredited provider by the ACCME, ASCRS and ASOA must ensure balance, independence, objectivity, and scientific rigor in all its individually or jointly provided activities.

All individuals participating in a CME activity must disclose any financial interest or relationship with a company that produces, markets, resells, or distributes ophthalmic products/devices/drugs or services discussed in an educational presentation or lack thereof. Financial interest can include such things as grants or research support, consultant, stockholder, member of speaker's bureau, financial relationships held by spouse, etc. The intent of the financial interest disclosure is to provide information to the ASOA Program Committee to design and implement a balanced, independent, and educational activity. The Financial Interest Index in the Final Program/Meeting App provides information to attendees so they can make their own judgment regarding the interest or relationship and the materials presented.

Potential participants (instructors, authors, producers etc.) in ASCRS-sponsored and jointly provided CME activities, including co-instructors/co-authors/co-producers, presenters, panelists etc., must provide a complete listing of ALL financial relationships relevant to ophthalmology—not just those related to a specific talk—in the financial interest disclosure database. Any relevant financial relationship that occurred within the previous 12 months should be reported. Those who have no financial interests to disclose should indicate “none” in the database. Disclosure information will be kept on file and used during the calendar year in which it was collected for all CME-bearing activities.

To submit for the 2020 ASOA Annual Meeting, you must complete the financial disclosure information in this database. All lead presenters must notify all faculty that they must enter their financial interest information. Submissions with incomplete financial disclosures will not be accepted for presentation.

In addition to the written disclosure, presenters must disclose financial relationships (or lack thereof) at the start of the presentations.



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## **FACULTY CME REVIEW REQUIREMENTS**

To ensure balance, independence, objectivity, and scientific rigor, all faculty members who participate in the ASOA Annual Meeting, an ASCRS CME activity, are required to review the ASCRS Faculty CME Review Policies and Procedures. This system ensures ASCRS' continued compliance with the ACCME's guidelines and ensures that the Societies provide exceptional quality continuing education.

## **SUBMITTING FINANCIAL INTEREST DISCLOSURE AND ASCRS FACULTY CME REVIEW**

Go to <https://ascrs.confex.com/ascrs/ficme20/cfp.cgi> and click on “**Submit Financial Interest Disclosure and ASCRS Faculty CME Review.**”

**Step 2:** Submit your ASOA Annual Meeting course abstract:

<https://ascrs.confex.com/ascrs/20asoa/cfp.cgi>

- Provide all required information. The process will allow you to review your submission.
- It is important to use a valid e-mail address as all correspondence regarding the account and/or submission will be sent to this e-mail address.

**Step 3:** Use your browser “print” command to print a copy of your submission for your records. If you do not receive a completed submission confirmation ID, please contact: [submissions@asoa.org](mailto:submissions@asoa.org). Incomplete submissions will not be processed.

## **NOTIFICATION OF SUBMISSION STATUS**

An e-mail with the status of the submission will be sent by December 20. If notification is not received by December 24, please contact: [submissions@asoa.org](mailto:submissions@asoa.org).

## **SUBMISSION WITHDRAWALS**

If an instructor/faculty is unable to present, he/she must notify ASOA by e-mail at [submissions@asoa.org](mailto:submissions@asoa.org).

If an instructor/faculty fails to submit notification of withdrawal or does not present, he/she will be ineligible to submit for the 2021 Annual Meeting (see Guidelines for Nonacceptance).