



Professional Portfolio Guide

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Introduction

Every year, all registrants must engage in self-assessment and professional development through the completion of a Professional Portfolio. Maintaining an annual Professional Portfolio is a mandatory requirement of the Quality Assurance (QA) Program. This collection of documents reflects your career history and demonstrates ongoing learning and maintenance of technical and professional competence. The College developed and implemented the Professional Portfolio as a way for registrants to document self-assessment and continuing education with the aim to sustain competence within opticians.

The philosophy behind QA Competency Enhancement is one of lifelong learning and the program is based on adult education principles. The Professional Portfolio is one tool the College has developed to support registrants in consciously engaging in continuing education and professional development. This approach allows opticians to choose activities based on their learning style and acknowledges that learning comes from engaging in a variety of activities.

As a regulated professional, every registrant is responsible for formulating a personal plan for engaging in ongoing education. The plan should include activities and resource material that support relevant to your learning needs. By requiring ongoing engagement in professional development, the College ensures the public that opticians consciously engage in continuing education.

Self-regulated professionals engage in professional development and continuing education to maintain competence and keep abreast of current knowledge, skill, research, and industry and/or regulatory standards. The public expects opticians to be competent and provide up-to-date knowledge and service.

Professional Portfolio Components

Annually, every registered optician in Ontario must complete a Professional Portfolio consisting of:

- 1. Competency Self-Assessment**
- 2. Professional Development consisting of 16 Continuing Education (CE) hours broken down as follows:**
 - 4 accredited hours specific to Contact Lens (CL) technology, and
 - 4 accredited hours specific to Eyeglass (EG) technology, and
 - 4 accredited hours specific to Professional Growth (PG). and
 - 4 Non-accredited/Self-directed CE hours
- 3. Jurisprudence Chapter 1: Professional Boundaries and Sexual Abuse Prevention** – this must be completed within 12 months of registration and then once every 3 years.

All components of the annual Professional Portfolio (Accredited, Non-accredited/Self-directed hours, Competency Self-Assessment, and the Jurisprudence Module must be completed in the Quality Assurance section of your Registrant Portal.

The Professional Portfolio materials must be completed online through your Registrant Portal by December 31st of each year.

Continuing Education Requirements for Newly Registered Opticians

Newly registered opticians, who have not held registration as a registered optician (RO) in the past, must still complete a Professional Portfolio in the first calendar year of their registration. There are prorated CE requirements for registrants based on the date of their initial registration.

Date Registered	Accredited CE Hours Required	Non-accredited, Self-Directed CE Hours required
January 1 – March 31	12 (100%)	4 (100%)
April 1 – June 30	9 (75%)	3 (75%)
July 1 – September 30	6 (50%)	2 (50%)
October 1 – December 31	3 (25%)	1 (25%)

This chart does not apply to registrants who are reinstating their RO license. *This schedule applies to the first calendar year of registration only. In the second year of registration, registrants must complete all 16 CE activity hours.*

Registrants who have reinstated their license as a RO will need to complete the full 16 hours of CE activities within the first calendar year of reinstatement regardless of when they register in the year.

The completed Portfolio materials must be maintained for 6 years. When randomly selected for QA Competency Review and Evaluation (CRE) or when requested by the QA Committee, opticians are required to submit their completed Portfolio materials to the College. The QA Committee may request two years of completed Portfolios.

Continuing Education Requirements for Reinstated Opticians

New Registration regulation comes into effect July 1, 2024, when the College will introduce a new inactive class of registration. This inactive registration class is intended for opticians not actively practicing but wish to maintain their registration with the College.

The number of continuing education hours Registered opticians who move to the Inactive class during the calendar year are required to complete will be prorated based on when in the calendar their status changes.

The prorated continuing education requirements from **Registered to Inactive**:

Percentage of the Year Registered	Accredited CE Hours Required	Non-accredited, Self-Directed CE Hours Required
1% - 25%	3 (25%)	1 (25%)
26% - 50%	6 (50%)	2 (50%)
51% - 75%	9 (75%)	3(75%)
76% - 100%	12 (100%)	4 (100%)

Inactive opticians are not required to participate in the Quality Assurance Program or demonstrate ongoing currency.

Registrants holding a certificate of registration as an Inactive optician that reinstate their registration status with the College will be required to complete their professional portfolio. Their continuing education requirements will be pro-rated based on the date the Registered Optician certificate is re-issued. Hours are only prorated during the calendar year in which the status change from Inactive to Registered Optician occurs.

The prorated continuing education requirements from **Inactive to Registered Optician**:

Date Registered	Accredited CE Hours Required	Non-accredited, Self- Directed CE Hours Required
January 1 – March 31	12 (100%)	4 (100%)
April 1 – June 30	9 (75%)	3 (75%)
July 1 – September 30	6 (50%)	2 (50%)
October 1 – December 31	3 (25%)	1 (25%)

Competency Self-Assessment

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

Every year you should complete the Competency Self-Assessment in January, which can be found through your online registrant portal. Should your practice or practice environment change throughout the year, you may want to review and update your Self-Assessment.

TIPS FOR COMPLETING YOUR COMPETENCY SELF-ASSESSMENT

- There are no right or wrong answers. The College will not score your self-identified rating. This form is solely to encourage self-reflection on your current learning needs.
- With experience, you will become familiar with the self-assessment process, more skilled in your self-assessment skills, and develop a better understanding of your strengths and areas in which development is needed.
- Make time to consult with colleagues to receive feedback on your practice and Professional Improvement Plan.
- Identify major changes in your practice. For example, there may have been changes to your practice environment or to standards and legislation.
- Review the reference materials in the footnote in the form. This information will help you understand regulatory and professional expectations including laws, regulations, and standards governing practice, relevant legislation, new College documents, and other information.

RATING YOURSELF

When you complete the survey, rate each activity considering your primary role and any other roles you have within your practice. Compare your performance in your practice with the College's standards of practice and the professional obligations required in Ontario. Choose from these options when rating your competencies:

- ✓ **Consistently Perform:** You are competent and consistently perform at the standard required for your practice, setting, and role. There may be some statements for which you are not ready to check this category.
- ✓ **Room for improvement:** You need or want to enhance your practice in this area. Check both "Consistently Perform" and "Room for improvement" if you already perform at the required standard but want to develop additional knowledge and/or skills.
- ✓ **N/A (Not Applicable):** This describes an aspect of a particular competency that does not apply to your practice at this time.

Accredited Continuing Education Activities

Opticians are required to record their accredited CE hours online through the Quality Assurance section of the Registrant Portal and upload the completion certificates annually by December 31.

For assistance uploading CE to the Registrant Portal, please visit the [Registrant Portal Help page](#).

The annual accredited CE requirements include:

- 4 accredited Contact Lens (CL) Hours
- 4 accredited Eyeglass (EG) Hours
- 4 accredited Professional Growth (PG) Hours

HOW TO CALCULATE ACCREDITED CE ACTIVITY HOURS

Accredited CE activities can be accumulated in the following ways:

- Hour-for-hour for activities that have been approved as accredited by the QA Committee as published on the College's website.
- Hour-for-hour for presenting accredited activities. Registrants may claim accredited hours equal to the accredited hours offered for the presentation. Registrants can only claim accredited hours for the first presentation conducted.

WHAT IF I COMPLETE A HYBRID CE ACTIVITY (e.g., EG/CL)?

If you have completed a hybrid CE activity (e.g. EG/CL or EG/CL/RF), you must identify which CE category you would like to apply the activity to. For example, if you completed an accredited activity as EG/CL, you must choose whether this activity will be applied as a contact lens or eyeglass activity.

If you have completed a hybrid CE activity that is worth more than 1 hour, you can choose to split this activity and include it in two different CE categories if this will help you fulfil your requirements. For example, if you completed a course that was accredited as 2 EG/CL, you can use 1 hour as an eyeglass CE and 1 hour as a contact lens CE. Please contact qa@collegeofopticians.ca for assistance with this.

Non-Accredited/Self-Directed Hours

The annual self-directed CE requirement is **4 non-accredited, self-directed CE hours**.

STEPS TO DEVELOPING SELF-DIRECTED LEARNING

- 1. Plan your learning for the year:** After completing the Competency Self-Assessment form, think and plan about the activities you will do that will have a positive effect on your practice.
- 2. Track and describe your completed non-accredited, self-directed CE activity hours:** Make sure to record:
 - The name of the activities or a description of them;
 - The presenter information or the resources used (e.g., Website address, journal title, conference title, etc.);
 - The dates you completed the activities;
 - If and how the activities addressed your learning needs; and
 - How many hours it took you to complete the activities
- 3. Reflect on the knowledge and/or skills you acquired:** Summarise any new knowledge and skills you have gained and the positive effect it has made on your practice.

WHAT ARE SOME EXAMPLES OF NON- ACCREDITED, SELF-DIRECTED CE ACTIVITIES?

Non-accredited CE activities can be described as any activity that supports learning, reinforces current practice, and/or provides new knowledge and/or skill. Some examples of non-accredited CE activities may include but are not limited to:

- **Critical incident analysis:** A critical incident is sometimes called an ‘Aha!’ experience. Document the thought-provoking incident indicating when errors occurred or were narrowly averted. When something went well, state how you could repeat that success next time.
- **Organized events:** Conferences, sponsored education, events, and lectures that are not accredited by the College.
- **Information from the College:** Exploring the College website, reading the College newsletter, attending College teleconferences, or watching College webinars.
- **Learning from patients:** Document and reflect on what you have learned from patients who ask a question you don’t know how to answer or present with a condition you are unfamiliar with. How did you approach these situations? What did you learn?
- **Interactions with students:** Supervising and mentoring students, interns, and peers.
- **Professional journals:** Reading journal articles, abstracts, white papers, or articles published on credible websites.
- **Outreach:** missionary work, or professional opticianry volunteer work.
- **Professional contacts:** Describe situations in which you learned from your peers. From whom did you learn, what did you learn, and how has this learning experience affected your practice?
- **Project work:** Contributing to the development of patient education or marketing materials

- **Distance learning activities:** Learning more about opticianry or professional development through print, internet, video, and/or television.
- **Excess accredited hours:** any excess accredited hours can be used toward your non-accredited/self-directed hours.

HOW TO CALCULATE YOUR NON-ACCREDITED, SELF-DIRECTED CE ACTIVITY HOURS

Non-accredited, self-directed CE activity hours can be accumulated in the following ways:

- Hour-for-hour for non-accredited, self-directed learning activities, for example:
 - ❖ Live and/or multi-media presentations (seminars/lectures/workshops)
 - ❖ Distance learning activities (print/internet/video/television)
 - ❖ Scholastic (educational institution- based courses)
 - ❖ Self-study or organized study groups
 - ❖ Emergency medical course (such as CPR and/or first aid)
 - ❖ Supervision of students and intern opticians
 - ❖ Participation as a Board or Appointed Member of the College
 - ❖ Participation as a Professional Association Board Member
 - ❖ Volunteer events such as uncompensated opticianry missionary work

*You must complete all the information in the non-accredited, self-directed tab, including reflecting on knowledge and/or skill gained and the effect it has on your practice when applying any of the above to your professional portfolio.

Tips for Developing your Self-Directed Learning

- Look at your professional needs and current circumstances to create your self-directed learning. This is an opportunity to fill gaps in your knowledge, skill, and practice. Also, refer to the Competency Self-Assessment form and the College's standards of practice.
 - Choose appropriate CE activities. The activities should help improve your knowledge and the quality of care in your practice, practice site, or profession.
 - Enhance your practice. Choose activities that will improve:
 - Quality in a specific area,
 - Patient outcomes; and/or
 - Professional Development in the practice,
 - Your performance in a specific area of practice.
 - Enhance your practice within your practice site. Choose activities that will:
 - Transfer new knowledge to other opticians; and/or
 - Update your knowledge with new techniques in your field,
 - Allow you to take a leadership role in encouraging best practice.
 - Enhance your practice within the profession. Choose activities that will:
 - Assist in the development of standards of practice or other professional standards; and/or
 - Mentor, teach, or educate those who are seeking more experience in the field of opticianry.

- Combine any related opportunities:
 - Identify two or three opportunities that are priorities for you. Learning is a lifelong process, so avoid taking on too much. Focus on the most critical learning opportunities that will benefit your practice.

The following figure demonstrates how to complete the time spent and knowledge gained from a 1-hour training session with an Oakley representative.

The image shows a screenshot of a web form from the College of Opticians of Ontario. The form is titled "Edit source form" and contains several input fields. The following table summarizes the data entered in the form:

Field Label	Value
Year	2024
Time Spent - Hours	1
Time Spent - Minutes	0
Date Completed	3/5/2024
Activity and/or Resource material used	Oakley Training with Oakley Rep
Summarize new knowledge and/or skills gained and the effect on your practice	This was a presentation from the Oakley rep to summarize their lenses and frames. The focus was mainly on the lenses, specifically the Prizm design lens. This information will help me support patients in selecting specialty prescription and non prescription sunglasses that will meet their visual needs based on activity/hobby.

At the bottom of the form, there are two buttons: "Back/Cancel" and "Save & Return".

Figure 1 Entering time spent with Oakley Rep

Jurisprudence Chapter 1: Professional Boundaries and Sexual Abuse Prevention Module

The purpose of this tool is to help registered opticians acquire knowledge about the laws, standards, and guidelines that affect opticianry in Ontario. Registrants have unlimited attempts to complete the tool and must achieve a minimum passing mark of 80%. A certificate is issued at the end of the test completion which is required as evidence of completing this tool. Registrants are required to maintain a copy of their completion certificate in their Professional Portfolio as evidence of successful completion of the Jurisprudence Professional Boundaries and Sexual Abuse Prevention Self-Evaluation Tool.

This tool must be completed every 3 years. New registrants must complete the tool within the first 12 months of initial registration. This module is worth 1 PG credit in the year it is successfully completed.

The remaining Jurisprudence modules are optional and can be completed once every 3 years. Upon successful completion these can be used as 1 PG the year in which they are completed.

Jurisprudence: Chapter 1 may be accessed through the Quality Assurance section of the registrant portal. The following displays how to access Jurisprudence within the registrant portal:

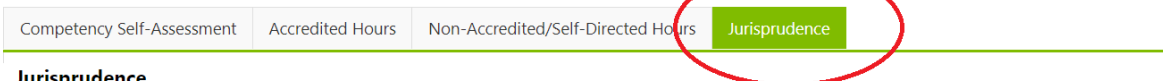
Professional Portfolio

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

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

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

****Your test session will time out after 2 hours. When you begin your test, you will see a timer in the lower right corner. Please be sure to complete your test within this time frame as your work will not be saved and, you will have to begin the test again.**



Jurisprudence

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

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

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

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

Click



Jurisprudence Resources

 [Jurisprudence Handbook \(chapters 1-4\)](#)

[Jurisprudence Video \(chapter 5\)](#)

[Manuel de jurisprudence \(chapitre 1\)](#)

[Vidéo sur la jurisprudence \(chapter 5\)](#)

Tests Dashboard

Your test session will time out after 2 hours. When you begin your test, you will see a timer in the lower right corner. Please be sure to complete your test within this time frame as your work will not be saved and, you will have to begin the test again.

Test Name	Status	
Mandatory - Chapter 1 - Professional Boundaries and Sexual Abuse Prevention	Incomplete	Start Test 
Obligatoire - Chapitre 1 - Limites professionnelles et de prévention des abus sexuels	Incomplet	Démarrer le test
Optional - Chapter 2 - Record Keeping, Confidentiality and Privacy	Incomplete	Start Test
Optional - Chapter 3 - Communications	Incomplete	Start Test
Optional - Chapter 4 - Introduction to the RHPA	Incomplete	Start Test
Optional - Chapter 5 - Diversity, Equity and Inclusion	Incomplete	Start Test
Optionnel - Chapitre 5 - Diversité, équité et inclusion	Incomplet	Démarrer le test

Once you have reviewed the Chapter, begin the test. The test will time out after 2 hours and, your results will not be saved so please ensure you complete it within this time frame.

Resources

1. [Quality Assurance Program FAQ](#)
2. [Registrant Portal Sign In](#)
3. [Video - Completing your Professional Portfolio Online](#)
4. [List of Accredited Continuing Education Activities](#)

Glossary

Competent – is the quality of being adequate by possessing the required skill, knowledge, qualification, and/or capacity.

Competency Self-assessment – is ongoing appraisal of one's professional practice to enhance personal competence and improve future practice.

Continuing competence – is the ongoing ability to integrate and apply the knowledge, skills, attitudes, and judgements required to practice safely and ethically in the optician's role and to fulfil employment responsibilities. Competency can be measured against acceptable standards, such as the Professional Standards of Practice for Opticians in the Province of Ontario. (Adapted from the CAN, 2000 and the CPA, 2003).

Continuing professional development – is the process of engaging in activities that support lifelong learning and result in continuous growth in knowledge, skills, and judgement required for opticianry practice. Professional development involves a mixture of formal and informal learning activities including attending courses, reading journals, and participating in professional committees.

Continuous quality improvement – is defined by the Ontario Health Quality Council as the systematic use of tools from quality improvement science that have been developed over the past 60 years. It includes understanding how systems operate, measuring and monitoring quality over time, and implementing change. (The council is a resource for members of the public who want to play an active role in their care and for people who work in the system who want to improve quality).

Enhancement – is striving for constant improvement.

Hour-for-Hour –The number of hours taken to acquire an activity equals the number of hours you can claim (this is only for self-directed hours).

Incompetent – means lacking in qualifications or ability, being incapable, performing below the standard. If incompetent, you are unable or legally unqualified to perform specific acts.

Outcome – is a characteristic that is expected to change because of a provision of a strategy, intervention, or program.

Practice – refers to all patient-related activities as defined within the legislated scope of practice of an optician. This includes all practice care, financial records and reports, behaviour while using the title of optician, and activities undertaken to enable opticians to meet professional standards and incorporate professional expectations into institutional policies.

Quality Assurance Program – means a program to ensure the quality of the practice of the profession and to promote continuing evaluation, competence, and improvement among the registrants. (June 4, 2009, RHPA, Ontario).

Reflection – is careful thought, especially the process of reconsidering previous actions, events, or decisions.

Scope of practice – in opticianry is the provision, fitting, and adjustment of subnormal vision devices, contact lenses, or eyeglasses, Opticianry Act, 1991, c. 34, s. 3.

Non-Accredited/Self-directed hours– is self-initiated study that enhances the optician’s learning. E.g., Reading journal articles and visiting websites relating to opticianry, business, marketing, or financial planning. This can be anything relevant to your learning in the Opticianry field which can help you in your place of practice.