

The COE examination covers a comprehensive body of knowledge that an ophthalmic administrator with approximately three years of experience in the field is expected to be familiar with and/or have mastered.

The following outline delineates the content areas and the percentage of questions for each of the major content areas.

CONTENT OUTLINE

I. Basic Ophthalmic Knowledge 5%

- B. Knowledge of basic ophthalmic terminology
- C. Familiarity with basic ophthalmic/optical/surgical procedures and protocols
- D. Familiarity with basic ophthalmic instruments
- E. Knowledge about ophthalmic practice triage
- F. Familiar with customary ophthalmic patient services
- G. Anatomy
- H. Pharmacology

II. Finance and Accounting 20%

- A. Practice generally accepted accounting principles (i.e., GAAP)
 - 1. general ledger
 - 2. cash flow
 - 3. income statement
 - 4. depreciation
 - 5. balance sheets accounts receivable
 - 6. accounts receivable
 - 7. payroll
 - 8. accounts payable
 - 9. audit trails
- B. Study and evaluate operations and financial reports
- C. Prepare and monitor budgets
- D. Demonstrate an understanding of corporate structure and its tax implications
- E. Implement and coordinate accounting procedures
 - 1. internal controls
 - 2. protocols
- F. Develop a cost/benefit analysis
- G. Understand practice valuation
- H. Evaluate and acquire capital assets
- I. Analyze the financial implications of contracts

III. Marketing 5%

- A. Conduct internal and external customer satisfaction surveys
 - 1. focus groups
 - 2. interviews
 - 3. written and telephone surveys
 - 4. demographics
 - 5. patient comments

- B. Develop and implement a marketing plan
- C. Design, implement and monitor advertising and promotional programs
- D. Plan and conduct public relations programs
- E. Lead tracking
- F. Marketing strategy
- G. Marketing terminology
- H. Retail marketing

IV. Operations 25%

- A. Develop, prepare, analyze and monitor reports
 - 1. productivity
 - 2. financial
 - 3. utilization
 - 4. inventory
 - 5. human resources
- B. Identify need, create and implement policies and procedures
- C. Identify, analyze and implement processes for practice improvement
 - 1. quality improvement tools
 - a. flowcharting
 - b. brainstorming
 - c. cause-and-effect diagramming
 - d. Pareto diagramming (80/20 rule)
 - e. check sheets
 - f. patient flow
 - g. medical outcomes practice patterns
 - h. efficiency
 - i. effectiveness
 - j. benchmarking
 - 2. methods
 - a. storyboarding
 - b. plan, do, check, act (PDCA)
 - c. situation target plan (STP)
- D. Establish and maintain stakeholder relationships
 - 1. vendors
 - 2. third-party payers
 - 3. referral sources
 - 4. professional services providers
 - 5. patients
 - 6. staff
- E. Develop, implement and monitor a business and/or strategic plan
 - 1. strength, weaknesses, opportunities, & threats (SWOT)
- F. Manage and maintain property, facilities, equipment and supplies
 - 1. disaster recover plan
 - 2. security systems
- G. Design, implement, and monitor organizational structure
- H. Design, implement, and monitor managed care operations
- I. Establish and maintain fee schedules
- J. Define operational terms
- K. Provide leadership

- L. Manage projects
- M. Develop business
- N. Understand and manage business insurance
- O. Manage legal issues
- P. Manage lines of business (optical, ASC, refractive, etc)

V. Management Information Systems 5%

- A. Analyze and manage MIS
 - 1. computer and phone systems
 - 2. communication infrastructure
 - 3. telemedicine
 - 4. electronic medical records integration of systems
 - a. local area networks (LANS)
 - b. wide area networks (WANS)
 - 5. electronic billing
- B. Build Technology IS
 - 1. electronic resources
 - a. internet
 - b. networks
 - c. website
- C. Maintain Hardware and Software
 - 1. system maintenance
 - 2. file maintenance
- D. Administer Databases

VI. Human Resources 20%

- A. Develop and administer personnel policies
 - 1. job descriptions
 - 2. staff & physician recruitment and hiring
 - 3. retention
 - 4. training and development
 - 5. discipline and dismissal
 - 6. evaluation
- B. Formulate and administer compensation and benefit programs
 - 1. salary and benefit surveys
 - 2. physician compensation
 - 3. incentive plans
 - 4. insurance benefits
 - 5. retirement benefits
 - 6. other benefits
- C. Develop and facilitate communication skills and techniques
 - 1. building team spirit
 - 2. resolving conflicts
 - 3. mentoring and facilitating
 - 4. negotiating
- D. Monitor staffing levels

VII. Risk Management & Regulatory Compliance 20%

A. Understand and comply with federal, state and local laws, regulations and guidelines pertaining to personnel

1. OSHA
2. FMLA
3. HIPAA
4. ADA
5. wage and labor laws (e.g. FLSA)
6. insurance regulations (e.g. ERISA, COBRA)
7. Civil Rights Act
 - a. age
 - b. religion
 - c. national origin or ethnic-heritage
 - d. race or color
 - e. sexual orientation
 - f. gender

B. Develop, implement and monitor a compliance/quality assurance program

1. malpractice
2. policies and procedures
3. legal exposure minimization
4. patient relationships
5. employee relationships
6. confidentiality: patients and employees
7. patient records release
8. regulatory compliance
9. coding
10. documentation
11. reimbursement
12. supervision
13. record retention
14. standard of care

C. Implement and manage co-management policies and procedures