



2022 GWCO Congress Speaker Packet

October 6-9, 2022

Oregon Convention Center
Portland, Oregon

Great Western Council of Optometry
www.gwco.org • info@gwco.org

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2022 Speaker To-Do List

DUE	TASK	INSTRUCTIONS	COMPLETE?
5/1/2022	Financial Disclosure Information	<ul style="list-style-type: none"> Log in to your GWCO account Follow the link to complete the form: https://gwco.memberclicks.net/2022gwcospeakerfinancialdisclosure 	<input type="checkbox"/>
5/1/2022	Conflict of Interest, Content, COPE, and Compensation Agreement	<ul style="list-style-type: none"> Log in to your GWCO account Review and complete online agreement form https://gwco.memberclicks.net/2022GWCOspeakerAgreement <p><i>Note: Be prepared to upload a brief bio (200 words max), headshot, CV, Last 4 Digits of Social Security</i></p>	<input type="checkbox"/>
No Later Than 5/1/2022	COPE course submission	<ul style="list-style-type: none"> Please complete your COPE course submission. 	<input type="checkbox"/>
No Later Than July 15, 2022	PowerPoint Presentation(s)	<ul style="list-style-type: none"> Log in to your GWCO account Upload your PowerPoint presentation(s) for peer review (See page 6): https://gwco.memberclicks.net/2022GWCOspeakerDocumentsUpload 	<input type="checkbox"/>
No Later Than July 15, 2022	Presentation Outline(s)	<ul style="list-style-type: none"> Log in to your GWCO account Upload your Presentation Outline(s): https://gwco.memberclicks.net/2022GWCOspeakerDocumentsUpload Outline must include: Session title, session description, session learning objectives, timed outline of session, etc. (See page 12 for example outline) 	<input type="checkbox"/>
No Later Than July 15, 2022	Handout(s)	<ul style="list-style-type: none"> Log in to your GWCO account Upload your Handout(s) to be shared electronically to attendees: https://gwco.memberclicks.net/2022GWCOspeakerDocumentsUpload 	<input type="checkbox"/>
No Later Than August 15, 2022	GWCO Speaker Travel Data	<ul style="list-style-type: none"> Log in to your GWCO account Follow the link to complete the form: https://gwco.memberclicks.net/2022gwcospeakertravel 	<input type="checkbox"/>
No Later Than September 1, 2022	Register for GWCO 2022 Congress	<ul style="list-style-type: none"> Log in to your GWCO account Register online at https://gwco.memberclicks.net/gwcocongress2022 <i>Registration will open in June 2022</i> 	<input type="checkbox"/>
No Later Than November 9, 2022	GWCO Speaker Reimbursement Form	<ul style="list-style-type: none"> Submit completed form (with electronic or scanned receipts) via email to: info@gwco.org 	<input type="checkbox"/>

GWCO Conflict of Interest Management & Resolution

COPE Disclosure Statement

COPE has adopted the ACCE® Standards for Commercial Support (SCS) of continuing education. Instructors and Administrators/Providers of COPE-Accredited CE must agree to abide by the following standards regarding commercial support.

The Association of Regulatory Boards of Optometry (ARBO) has implemented guidelines to appropriately manage industry relationships in support of continuing activities to ensure transparency, fair balance, content free of commercial bias and an effective system of oversight. As a COPE Administrator/Provider, to comply with the COPE requirements for course qualification, the Great Western Council of Optometry is required to submit a financial disclosure to ARBO for instructors presenting CE-approved courses at the 2022 GWCO Congress, as well as those individuals involved in the selection and organization of CE-approved courses.

If you have not done so, please complete the Financial Disclosure Form which includes COPE regulatory agreement. You can complete the Financial Disclosure Form by following this link:

<https://gwco.memberclicks.net/2022gwcospeakerfinancialdisclosure>

GWCO COI Management & Resolution

To identify and resolve conflicts of interest in its Continuing Medical Education activities, the Great Western Council of Optometry has established the following policy for those involved in the planning and implementation of CE activities.

It is the policy of GWCO to incorporate the following values:

- GWCO must place a higher priority on the health and well-being of the public than on an individual's personal economic interests.
- Some individuals in CE have personal economic interests derived from financial relationships with commercial entities that create a personal sense of duty or loyalty to the commercial entity.
- Some financial relationships with commercial entities are important enough to conflict with the individual's responsibility to CE learners and with the public interest.
- If an individual in CE has a conflict of interest, GWCO must manage the conflict in a manner that is in the best interest of the public.
- Definition of Conflict of Interest: "Circumstances create a conflict of interest when an individual has an opportunity to affect CE content about products or services of a commercial interest with which he/she has a financial relationship".
- Financial relationships are considered to create actual conflicts of interest in CE when individuals have both a financial relationship with a commercial interest and the opportunity to affect the

content of CE about the products or services of that commercial interest. “Content of CE about the products or services of that commercial interest” is considered to include content about specific agents/devices, but not necessarily about the class of agents/devices, and not necessarily content about the whole disease class in which those agents/devices are used.

GWCO Education Chairs and Executive Staff are charged with the following responsibilities:

- Identifying potential relevant financial relationships prior to the activity being developed and delivered to the learners.
- Obtaining from all faculty and planners’ disclosures of their financial relationships relevant to the content being considered or planned for the activity.
- Clarifying content expectations with faculty including course chairs and presenters in all program formats.
- Requiring that all presentations be evidenced based.
- Requiring pre-conference peer review of content.
- Disqualifying those individuals who refuse to disclose relevant financial relationships from roles that will give them the opportunity to affect the development, management, presentation, or evaluation of that CE activity.

Mechanisms for Management of COI

GWCO has established the following mechanisms to identify and resolve conflicts of interest (COI):

- All persons in a position to influence the content (Planners, Faculty, Speakers, Education Committee, or authors) will disclose to GWCO all relevant financial relations where the relationship is associated with the content of the activity, prior to any CE activity being developed and delivered to learners.
- Individuals who refuse to disclose relevant financial relationships are disqualified from having a CE role in the development, delivery, or evaluation of any CE activity.
- GWCO will review all disclosure forms submitted and identify any incidence where both a current financial relationship (within 12 months) with a commercial entity and/or the opportunity to affect content relevant to products or services of that commercial entity.
- GWCO disclosure review falls into two categories:
 - Forms which report no financial relationships are immediately put into "Final" status by the GWCO office staff and no Education Committee review occurs under normal circumstances.
 - A summary of the relevant data from each form with financial relationships disclosed will be prepared by the GWCO office staff and presented to the Education Committee for their review. Research data about the products and/or services provided by the commercial entities will be provided. The Education Committee will review the summary and research any other pertinent information. They will then determine if a

COI exists in accordance with the definitions as provided by the ACCE of a Conflict of Interest and a Financial Relationship (see above).

- In the event a COI is identified, one of the following must take place:
 - The individual (or member of family with COI) must provide evidence of elimination of the COI and will disclose this information to learners verbally (for live activities) and in print.
 - The individual will be replaced, and the activity will be planned and delivered by someone with no COI.
 - The content of the activity will be changed to the extent that no COI exists.
 - The educational activity is cancelled.

Activity presentation materials (PowerPoint, hard copy handouts, etc.) will be submitted for peer review in advance of the course to ensure a disclosure slide/page exists and that no COI is present:

- Education Committee members will monitor all live events for evidence of bias in favor of commercial interests; if commercial bias is deemed present, the speaker will be stopped and asked to change or clarify his/her remarks on the spot before continuing and will be barred from speaking at future GWCO activities for a period of two years.

Analysis of the data collected from evaluations enable GWCO to measure the effectiveness of our system for identifying and resolving conflicts of interest:

- If the data indicates errors made by reviewers, planners, or moderators, they can be addressed with an educational intervention regarding the importance of proper disclosure, conflict review, and methods of resolution; if deemed necessary, the individual may be restricted to working in other areas during any future volunteer efforts.
- Offending speakers may not be allowed to speak at future GWCO activities for a period of 2 years.

How to Register for the 2022 Annual Meeting

ALL GWCO SPEAKERS ARE REQUIRED TO REGISTER FOR THE ANNUAL MEETING.

- GWCO will waive the cost of your registration. See below for Discount Code.
Speakers must register online by **September 1, 2022** via <https://gwco.memberclicks.net/gwcocongress2022>
- Complete all registration information for yourself.
- To receive the correct discount on registration, please enter the discount code provided below at checkout.

Discount Code: SPEAKER2022

Registration Fee: Waived

Hotel Registration Information

All GWCO Speakers receive one complimentary room with either one or two beds on-site at the conference hotel. Your Speaker Compensation and Copyright Agreement details how many nights of room rate, resort fees, and tax are billed to GWCO. You will be responsible for all other costs associated with your hotel folio, including extra nights, amenities, room charges, and upgrades.

Below, we request your arrival and departure dates so we can accurately reserve your room. A reservation will be made with your room type preference and the number of nights provided by GWCO, based on arrival date. An email confirmation will come directly from the hotel. You are responsible for making any necessary adjustments – such as lengthening your stay – to your reservation by logging into the hotel's reservation site to be provided. GWCO staff are available for assistance by emailing info@gwco.org.

Please remember, GWCO can only guarantee you the number of nights reflected in your Speaker Compensation and Copyright Agreement. Please make adjustments and additional reservations immediately to avoid the rush of attendee hotel reservations and eventual sell-out of the GWCO hotel block.

Presentation Materials for CE Activities

As an accredited provider, GWCO ensures course materials adhere to the ACCE Standards for Commercial Support, which have been provided to you in this packet.

- Content is based on evidence that constitutes best practice.
- Selection and presentation of content is free of the control of a commercial interest.
- The intended result of CE activities is that learners will return to the clinical setting with information that improves the health and/or outcomes of patients.
- GWCO strives to produce useable syllabus materials to improve the quality of the take-home message. Submit presentations by **June 15, 2022** to allow time for review of presentation materials including:
 - Content validation by GWCO to ensure content is evidence based and not influenced by a commercial interest.
 - Draft review and edits.
- Materials must include:
 - Slide #1: Title slide
 - Slide #2: Disclosure slide
 - Slide #3: Needs Assessment statement and Expected Learning Outcomes
 - PowerPoint slide presentations in PPT format (no PDFs accepted)
 - Limit slides to fit the time allotted your session
 - Large size easy-to-read sans serif fonts: e.g., Arial, Futura, Gill Sans
 - Bullet points instead of full sentences
 - Easy-to-read text over background
 - Generic terms for drugs and equipment: use generic terms, not brand names
 - Avoid charts/graphs/images that are not readable on the screen
 - Avoid animated text and graphics detracting from your presentation
 - **INSTITUTIONAL logos are allowed *only* on Slide #1. NO COMMERCIAL LOGOS ARE ALLOWED**
- Please review and download the [2022 GWCO “How To” PowerPoint file](#). A sample slide background and format are provided for your use.

GWCO will work with you to adjust due dates when possible. However, when materials are not received by the latest possible due date, YOU will be responsible for:

- Submitting material on time for review by GWCO Education Committee.
- Producing the quantity of handouts required for the audience.
- Delivering prepared handouts to the meeting site for distribution to course participants.
- All costs associated with copying and transporting the material.

Continuing Education Guidelines

All selected speaker who are presenting courses to ODs at GWCO Congress are required to submit their sessions to ARBO for COPE accreditation. These applicable courses must be submitted NO LATER than **May 1, 2022**. If your course is not submitted by this deadline your presentation may be at risk of being removed from the GWCO program.

Please submit for COPE accreditation via the ARBO website: https://www.arbo.org/submit_course.php

GWCO will submit sessions that apply for additional accreditations on behalf of the speakers. These additional accreditations are through the American Board of Opticianry and National Contact Lens Examiners for ABO/NCLE credits and the American Optometric Association for Commission on Paraoptometric Certification (CPC) credits.

As mentioned above in the Speaker To-Do List, all speakers must submit a presentation slide-deck and detailed, timed outline via the GWCO ShareFile links provided. These documents must be submitted by **July 15, 2022**. As detailed in the Conflict of Interest, Content, COPE, and Compensation Agreement, speakers are required to upload a curriculum vitae and provide the last four digits of their Social Security Number.

COPE Reimbursements

GWCO will reimburse for 6 hours of COPE course submissions. Please add these hours to the Speaker Expense Reimbursement Form below and include COPE submission receipts.

OD Vs Para Sessions and CEs

All OD sessions are required to apply and obtain COPE accreditation. The GWCO office will submit applicable sessions for ABO/NCLE accreditation.

All AOP sessions will be submitted for CPC accreditation via the GWCO office. The GWCO office will submit applicable sessions for ABO/NCLE accreditation.

All OD & AOP sessions will be submitted for CPC accreditation via the GWCO office and COPE via the individual speaker. The GWCO office will submit applicable sessions for ABO/NCLE accreditation.

2022 Speaker Expense Policy

The following applies to all travel expenses related to the Great Western Council of Optometry Congress.

Travel Expenses: The cost of your travel will be reimbursed by GWCO up to \$750. Travel costs over the allowance will not be reimbursed unless prior approval is given by GWCO office or the Board.

Hotel: GWCO will arrange for your hotel accommodations as outlined in your Speaker Compensation Agreement Form. However, you must complete the online Faculty Travel Agreement form. Hotel room and tax charges for the number of nights allowed are charged to the GWCO master account. Additional nights/rooms or charges (e.g., meals, spa, golf, movies, bar, etc.) will be billed to you. Porter/Bellman tips will not be reimbursed. Please do *not* make your own hotel reservation; see instructions under “Hotel Registration Information,” above.

Expense Reimbursement and Honorarium: A Speaker Expense Reimbursement Form will be provided to you. The form must be used for reimbursements, including honorarium. Speakers will be paid \$350 an hour of presentation time. Speakers may not present for more than 6 hours, equating \$2100 in honorarium. We ask you to complete the form no later than **November 9, 2022**. Your honorarium (if applicable) and expense reimbursement will be mailed to you within 5 weeks of receipt. Reimbursement requests received after **November 9, 2022**, will not be paid.

Speaker Expense Reimbursement Form

To apply for travel expense reimbursement, submit the completed form ([download here](#)) along with receipts to info@gwco.org.

This post-conference expense form must be submitted with receipts within 30 days of travel dates. Reimbursement requests must be supported by receipts for all individual items of \$14.99 or more. Please attach receipts; airline passenger receipt or itinerary and/or confirmation may be used for electronic/ticketless travel. Meal costs are not reimbursed. Travel advances are not made against future travel expenses. Refer to Expense Reimbursement Policy for specific guidelines.

You must also complete and submit the attached W-9 form if you will be receiving an honorarium; no honorarium will be paid without a completed W-9 form.

Outline Example

Speaker Name: John Doe, Credential

Session Title: Lorem Ipsum

Course Length: XX minutes

Format: Live

Course Level (beginner, moderate, advanced): XXX

If already approved for accreditation, please indicate the accreditation ID number here (COPE, ABO/NCLE, and/or CPC):

1. **COPE:** XXX
2. **ABO/NCLE:** XXX
3. **CPC:** XXX

Session Description: Lorem ipsum dolor sit amet, ex duo verear vituperatoribus. No illum postulant prodesset eam, ex latine feugait ius. No duo ignota constituto, an atqui numquam quo. Ei regione salutatus cum, eum ad ipsum liber.

Learning Objectives (3 per hour):

1. Lorem ipsum dolor sit amet, te sumo clita pertinacia has, per no novum.
2. Lorem ipsum dolor sit amet, te sumo clita pertinacia has, per no novum latine phaedrum. His ne probo invenire, ne.
3. Lorem ipsum dolor sit amet, te sumo clita pertinacia has, per no novum latine phaedrum. His ne probo invenire, ne.

Outline:

1. Section 1: Lorem ipsum dolor sit amet, sit an laudem epicuri ea. 10 minutes
 - a. Lorem ipsum dolor.
 - b. Lorem ipsum dolor.
2. Section 2: Lorem ipsum dolor sit amet, has te. 20 minutes
 - a. Lorem ipsum dolor sit.
 - b. Lorem ipsum dolor sit.
 - c. Lorem ipsum dolor sit.
3. Section 3: Lorem ipsum dolor sit amet, ut sit viderer. 20 minutes
 - a. Lorem ipsum dolor.
 - b. Lorem ipsum dolor.
 - c. Lorem ipsum dolor.
4. Section 4: Lorem ipsum dolor sit amet, nam an. 5 minutes
 - a. Lorem ipsum dolor.



Form W-9 (Rev. October 2016) Department of the Treasury Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

Go to www.irs.gov/FormW9 for instructions and the latest information.

Form fields 1-7: Name, Business name, Tax classification, Exemptions, Address, City, ZIP code, List account number(s).

Part I Taxpayer Identification Number (TIN) section with Social security number and Employer identification number fields.

Part II Certification section with text: Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number...

Sign Here section with Signature of U.S. person and Date fields.

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9s.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
Form 1099-S (proceeds from real estate transactions)
Form 1099-K (merchant card and third party network transactions)
Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
Form 1099-C (canceled debt)
Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.