

2012

# OD EXCELLENCE National Conference

Develop **YOUR** Possibilities

**July 26-28 2012**

Manchester Grand Hyatt Hotel  
San Diego, California



Don't Survive . . .  
**THRIVE**



PARTNERSHIP



PROFIT BUILDING



LEARNING



## Registration Package

OD Excellence, LLC

Jerry Lieblein, OD, CEO  
Jerry Sude, OD, Chairman

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**Exciting News!** Back by popular demand, OD Excellence will be hosting its 2<sup>nd</sup> Annual Conference with Alliance Partners. The meeting will be held July 26 through July 28, 2012 in San Diego, California at the Manchester Grand Hyatt Hotel. Due to the great success and enthusiasm from last year's conference, we have increased the Coaching Sessions and added Staff Education. This year your Staff can attend the entire ABO training Sessions at no additional charge to your practice for their education.

We had many top scoring responses from both our attendees and exhibitors. We took this feedback and expanded our program to provide you with an even more exciting agenda for our 2<sup>nd</sup> Annual conference.

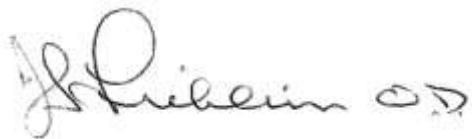
The OD Excellence National Conference brings the leaders in the optometric, optical and ophthalmological community together for dynamic presentations and lively discussions with some of the nation's most recognized industry speakers. Devoted entirely for optical professionals and their practices, this conference will feature a top-notch faculty. (Refer to the enclosed schedules)

***Conference Participants will enjoy:***

- Quality education classes for Doctors and Staff
- Ability to obtain 17 hours of Education with ABO and CPC Pending, as well as 13 hours of COPE Continuing Education (Pending)
- Opportunity to learn about and purchase the latest technologies and products from our Alliance Partners
- Affiliate Members enjoy full conference benefits and up to three nights hotel accommodation Free!
- Associate Members enjoy full conference benefits Free!

Please see the enclosed package for details on the educational opportunities, hotel information, and preliminary program and venue details. Registration will be available online approximately January 15<sup>th</sup>.

We appreciate the opportunity to work with you and look forward to seeing you at the  
*2012 ODX National Conference.*



**Jerry Lieblein, OD, CEO**



**Jerry Sude, OD, Chairman**



July 26-28, 2012

## Conference Agenda

### THURSDAY, July 26, 2012

8:00 a m - 6:00 p m		Registration
2:00 p m - 5:00 p m		Education Classes Begin
5:00 p m - 6:30 p m		Exhibit Hall Opens
6:30 p m - 8:00 p m		Welcome Reception Dinner

### FRIDAY, July 27, 2012

7:00 a m - 8:00 a m		Personal Coaching Sessions*
8:00 a m - 9:00 a m		Breakfast
9:00 a m - 12:00 p m		Education Classes
12:00 p m - 2:00 p m		Lunch / Exhibit Hall Open
2:00 p m - 6:00 p m		Education Classes
6:00 p m - 7:00 p m		Reception and Cocktail Hour in Exhibit Hall

### SATURDAY, July 28, 2012

7:00 a m - 8:00 a m		Personal Coaching Sessions*
8:00 a m - 9:00 a m		Breakfast
9:00 a m - 12:00 p m		Education Classes
12:00 p m - 2:00 p m		Lunch / Exhibit Hall Open
2:00 p m - 4:00 p m		Education Classes
4:00 p m - 6:00 p m		Ask The Experts Panel – Conference Ends

**\*Open to Doctors and Management Only**

**See Individual Doctors and Staff Schedules at end of document**

Limited seating available – coaching sessions will be first come, first serve - advance sign-up required.

Coaching Sessions have been expanded for this conference – each session will be one hour and will be held in a private meeting area.

#### **COACHING SESSIONS:**

**CODING AND BILLING** – LED BY CONSULTANT; DR. JOHN MCGREAL

**PRACTICE MANAGEMENT** – LED BY CONSULTANT; DR. SCOT MORRIS

**MANAGED CARE** – LED BY CONSULTANT; DR. JOHN LAHR

**OPERATIONS** – LED BY CONSULTANT; DR. JERRY SUDE

**STAFFING/TRAINING** – LED BY CONSULTANT; REBECCA JOHNSON, CPOT, COT, COE

*Agenda is subject to change*



July 26-28, 2012

**ODX Affiliate Member Registration (\$1,720.00 Value) is FREE and includes:**

A voucher for up to 3 nights stay at the Manchester Grand Hyatt in San Diego, CA*	\$720
Admission to Welcome Reception with Significant Other	\$190
Breakfast and Lunch Vouchers for Member Fri/Sat	\$160
Admission to Friday Cocktail Reception with Significant Other	\$100
Coaching Sessions	\$100
Admission to Exhibit Hall	\$25
\$50 Coupon (to be used to purchase products in Exhibit Hall)	\$50
All Education Classes	\$325 + \$50 Education Processing Fee

**\*Affiliate members will receive one 3 night hotel voucher at registration counter when registered by 3/15.**

**After 3/15 one 2 night voucher will be provided.**

**Free Package Requirement for Affiliate, Associate and Staff of ODX Members:**

To receive free registration packages, you must be a member of OD Excellence at least three months prior to the conference or have at least paid for three months dues. Members must be in good standing and or have payment arrangements approved by the finance department prior to receiving free package.

**ODX Associate Member Registration Package (810.00 Value) is FREE and includes the following:**

Breakfast and Lunch Vouchers for Member Fri/Sat	\$160
Admission to Friday Cocktail Reception with Significant Other	\$100
Coaching Sessions	\$100
Admission to Exhibit Hall	\$25
\$50 Coupon (to be used to purchase products in Exhibit Hall)	\$50
All Education Classes	\$325 + \$50 Education Processing Fee

**Non-Member Registration Package (760.00 Value) is \$380.00\* and includes:**

Breakfast and Lunch Vouchers for Member Fri/Sat	\$160
Admission to Friday Cocktail Reception	\$50
Coaching Sessions	\$100
Admission to Exhibit Hall	\$25
\$50 Coupon (to be used to purchase products in Exhibit Hall)	\$50
All Education Classes	\$325 + \$50 Education Processing Fee

Discount Cost for Non-Members/Guest Spouse

**\*\*50% off if registered by May 1, 2012 \$380.00**

**30% off if registered by July 15, 2012 \$532.00**

**At door full price \$760.00**

**DE Member Registration Package (\$710 Value) is \$280.00 and includes:**

(DE= Doctor employed by Affiliate Member)

Breakfast and Lunch Vouchers for Member Fri/Sat	\$160
Admission to Friday Cocktail Reception	\$50
Coaching Sessions	\$100
Admission to Exhibit Hall	\$25
All Education Classes	\$325 + \$50 Education Processing Fee

**Office Staff Registration Package (up to 415.00 Value) is \$75.00 per day and includes:**

**Free for Office Staff of ODX Members**

Admission to Exhibit Hall	\$25
All Education Classes	\$340 + \$50 Education Processing Fee

**Choices are: Thursday/Friday \$75 Thursday-Saturday \$150** (Meals and event tickets are not included but available for purchase).

### Registration

[Click here](#) to register for this National Conference. Online registration has been made easy for all participants. Please register on our website.

### Student Registration

Student Registration is complimentary for active, full-time optometry students, if you register on or before May 31, 2012. Student registration applies to students currently attending optometry school or those enrolled for the following semester. "Space is limited. Registration will be accepted on a first-come, first-serve basis." There is no guarantee of space availability after May 31, 2012.

Registration does not include any meal function or welcome reception. Meal functions can be purchased separately. Admittance to the Exhibit Hall is free. [Click here](#) to Register!

### Exhibit Hall Only Registration

**Admission to the Exhibit Hall is included with registration packages.** There will be a \$25 entry fee per person (including spouses, guests. No children under the age of 16.). All individuals are required to wear their registration badge for admittance into the Exhibit Hall. Exhibit Hall Only registration will be available at the On-Site Registration Desk. Does not include meal functions.

### Cancellation/Refund Policy

**ALL CANCELLATIONS MUST BE SUBMITTED IN WRITING.** All cancellations and requests for refunds must be sent to [johanna@odexcellence.com](mailto:johanna@odexcellence.com) no later than June 30, 2012. A full refund minus a \$50 administrative fee will be provided for cancellations received on or before April 15, 2012. A 50% refund will be provided for cancellations received between April 16, 2012 and June 30, 2012. No refunds will be given after June 30, 2012.

**Substitutions are allowed.** Please contact the ODX Corporate office at [johanna@odexcellence.com](mailto:johanna@odexcellence.com) with substitution information. **Please Note:** No refunds will be provided for "No-shows."

### Registration Questions?

Contact the OD Excellence Office Toll free at 855-2011ODX (855-201-1639) or e-mail [johanna@odexcellence.com](mailto:johanna@odexcellence.com)

### Hotel Accommodations

We have secured a block of rooms at The Manchester Grand Hyatt Hotel in San Diego. To make your reservations, [Click Here](#)

**All Affiliate members will receive hotel vouchers for up to 3 nights stay at N/C as an Affiliate member benefit\*.** Hotel reservation deadline is **May 31, 2012.**

**It is recommended that reservations be made as early as possible due to limited space. We have negotiated a special rate for conference attendees only should they wish to extend their stay. The rate will be at \$209 night + applicable taxes (3-Day Pre/Post event upon availability).**



### **Doctor Educational Information**

You must be in attendance for 50 minutes to receive COPE Continuing Education Credits

In the conference package you receive upon registration, will be one attendance form for all of the Continuing Education classes. After each class a Student Ambassador will be located at the exit to stamp and verify your attendance. At the end of the conference be sure to submit a copy to a Student Ambassador or ODX Staff and keep the original for your records and/or submittal to licensing agency. Be sure to enter your information on this form before submitting as last year we had several forms that were blank. Please submit this to your State Board/National Accreditation agency for license renewal.

The ODX courses will be submitted to COPE, for consideration of Continuing Education Credit approval. Most State Boards of Optometry now accept COPE approved courses. For specific State Board of Optometry license rules and regulations pertaining to the COPE acceptance, please contact your State Board directly. COPE approved courses are accredited in Canada.

Courses fill up quickly, so we recommend that you register early to secure your seat. Note: All Optometrists are required to provide their ARBO/OE Tracker # for COPE when registering for continuing education courses.

### **OE Tracker Number**

Contact **ARBO** at <http://www.arbo.org> if you do not know, or have not been issued an OE tracker number.

### **Office Staff Educational Information**

In the conference package you receive upon registration, will be an attendance form for each class you attend. After each class a Student Ambassador will be located at the exit to stamp and verify your attendance and will keep a copy to have on file as required. Please keep the originals for your records and/or submittal to licensing agency. Be sure to enter your information on this form before submitting, as last year we had several forms that were blank. Additional instructions and information will be provided at the conference. There will be 17 hours of Education with ABO and CPC Pending.

### **Free Package Requirement**

To receive free registration packages, you must be a member of OD Excellence at least three months prior to the conference or have at least paid for three months dues. Members must be in good standing and or have payment arrangements approved by the finance department prior to receiving free package.

**Thank you! We look forward to seeing you in San Diego!**



## Doctor Education Schedule

### THURSDAY, July 26, 2012

2:00 pm – 3:50 pm	Dr. John Lahr	“Coding and Billing for Today’s Active Practice”
3:50 pm – 4:10 pm	Break	
4:10 pm – 5:00 pm	Jay Binkowitz	“A Forensic Study/Understanding your Profitability”

### FRIDAY, July 27, 2012

7:00 am – 8:00 am	Drs. John McGreal, John Lahr, Jerry Sude and Scot Morris plus Rebecca Johnson, CPOT, COT, COE	Personal Coaching Sessions*
9:00 am – 10:40 am	Dr. John McGreal	“New Toys for the Toolbox”
10:40 am – 11:00 am	Break	
11:00 am – 11:50 am	Dr. John McGreal	“Introducing ICD – 10CM”
2:00 pm – 2:50 pm	Carl Zeiss Vision, CIBA Vision	Vendor Pearls
2:50 pm – 3:40 pm	Dr. Scot Morris	“Practicing the Medical Model”
3:40 pm – 4:00 pm	Break	
4:00 pm – 4:50 pm	Dr. Scot Morris	“Getting Ready for EHR Implementation”
4:50 pm – 5:40 pm	Dr. Scot Morris	“You Are What You Eat (Nutrition in Eye Care)”
5:40 pm – 6:00 pm	Dr. Jerry Lieblein	“Wrap Up”

### SATURDAY, July 28, 2012

7:00 am – 8:00 am	Drs. John McGreal, John Lahr, Jerry Sude and Scot Morris plus Rebecca Johnson, CPOT, COT, COE	Personal Coaching Sessions*
9:00 am – 10:40 am	Dr. Scot Morris	“Ocular Manifestations of Systemic Disease: Grand Rounds
10:40 am – 11:00 am	Break	
11:00 am – 11:50 am	Carl Zeiss Meditec, Alcon	Vendor Pearls
2:00 pm – 2:50 pm	Dr. John McGreal	“Connecting-the-Dots”
2:50 pm – 3:40 pm	Dr. John McGreal	“Putting OCT to Work in Your Practice”
3:40 pm – 4:00 pm	Break	
4:00 pm – 5:40 pm	Drs. John McGreal, John Lahr, Jerry Sude and Scot Morris plus Rebecca Johnson, CPOT, COT, COE	“Ask the Experts”
5:40 pm – 6:00 pm	Dr. Jerry Sude	“Wrap Up”



July 26-28, 2012

## Staff Education Schedule

### THURSDAY, July 26, 2012

#### Regular Session

2:00 p m - 3:00 p m	Rebecca Johnson	"Releasing Your Inner Champion"
3:10 p m - 5:00 p m	Mary Schmidt	"Building Patient Loyalty – How to Over-Deliver"

### FRIDAY, July 27, 2012

#### Breakout Session

	Staff Track 1 –ABO	Staff Track 2 –ABO	Staff Track 3 –ABO
9:00 a m - 10:20 a m	Certification Prep Course- Part 1 (CPO, CPOA, CPOT & ABO) Rebecca Johnson	"What to do When Your Patient is Unhappy With His New Glasses" Dr. Anne Marie Lahr	"Telephone Techniques – The Lifeline of the Practice" Mary Schmidt
10:20 a m - 10:40 p m	Break		
10:40 a m - 12:00 p m	Certification Prep Course – Part 2 (CPOA, CPOT & ABO) Rebecca Johnson	"Advanced Lensometry" Dr. Anne Marie Lahr	Telephone Shoppers -The Telephone "Looky Lou" Mary Schmidt

#### Regular Session

2:00 p m - 2:50 p m	Rebecca Johnson	"Medical Record Documentation"
3:00 p m - 3:50 p m	Dr. John McGreal	"Know about Coding and Billing"
3:50 p m - 4:10 p m	Break	
4:10 p m - 6:00 p m	Mary Schmidt	"Communication – Deeper Than Words"

### SATURDAY, July 28, 2012

#### Regular Session

9:00 a m - 10:50 a m	Valerie Manso	"I Speak"
10:50 a m - 11:10 p m	Break	
11:10 a m - 12:00 p m	Dr. Scot Morris	What Test Do I Do Now?"

#### Breakout Session

	Staff Track 1 –ABO	Staff Track 2 –ABO	Staff Track 3 –ABO
2:00 p m - 3:40 p m	Certification Prep Course- Part 3 (CPOT & ABO) Rebecca Johnson	"Management Excellence: Taking Staff To the Next Level" Mary Schmidt	"Frame Inventory Management" Valerie Manso

#### Regular Session

3:40 p m - 4:00 p m	Break	
4:00 p m - 6:00 p m	Drs. John McGreal, John Lahr, Jerry Sude and Scot Morris plus Rebecca Johnson, CPOT, COT, COE	"Ask the Experts"