



Licensee self-service portal guide

The system is designed to allow you as a licensee to control your license record information with 24-hour access. Here are some of the things you can do with the system: 1) update your contact information, 2) report changes to practice locations, 3) input CE courses, 4) update your CPR certification, 5)

check CE due dates (law/ethics, cultural competency, and pain management), 6) request license verifications or license copies and more. Below is detailed information about what you can do in the portal and how to do it. Our goal is to help you avoid late reporting fees and use the system to effectively meet your license needs.

PORTAL ACCESS—site access is always available on the [Board's website](#). The system is set up to send courtesy 45 and 30 day renewal reminders that have the system link, but the best source is always the Board's website. Any fields in the system with a red asterisk, are required fields. Be sure to complete all of those fields to save the information and move forward with the changes. Another note: when you set up your security question answers, jot them down. They are case sensitive, so you'll need to know exactly how you entered them for future system use.

Here are the sections of the system and what you can do in each section.

PERSONAL INFORMATION SECTION—this section includes your legal address of record with the Board. That's where we mail your license copy and any legal notices. Board rules require that you always have an accurate legal address of record with the Board. This section of the system also includes your OE tracker number, your phone number and your email address of record. This section will also allow you to include a carbon copy address that will be used for license renewal reminders. If you have your OE Tracker number in the system, the system pulls CE course data from ARBO into your CE record.

PLACES OF PRACTICE SECTION—this is where you'll report every Oregon practice location. If you have locations where you provide rotating or sporadic fill in service, enter each of them as places of practice. The Board determined several years ago that if you have sporadic fill-in locations, the termination date for reporting in the system, is when you, as a licensee, decide to terminate. Any other location that you work at on a regularly scheduled basis, must be reported when you commence and terminate services at the location. Board rules require you to report changes in practice locations within 14 days but no later than the effective date, to avoid a late reporting fee. You'll need to report one location as your primary practice. That's the address that's printed on your license. Note: Do NOT enter termination dates more than 14 days in advance.

QUALIFICATIONS—this is the section of the system where you report your CPR certification. You can see the current certification expiration date to know when you need to complete a new course without a lapse. Please see the Board's website for the list of approved CPR courses. When you complete a new course, add the new certification in this section and you can upload a copy of your card but aren't required to do so. Board rules allow you to extend the expiration date to the last day of the month.

INVOICES & RECEIPTS—Any payment made to the Board is tracked in the system. You can go here to print a receipt for tax purposes or reimbursement.

LICENSE RENEWAL—this box will show in the system and on the left-hand navigation if your renewal is available. Your renewal is available 45 days before your license due date. Reminder: your license due date is the first day of your birth month. You'll click through each page of the renewal. Be sure to update everything so that your contact information, CE courses and CPR are all updated. If CE or CPR isn't reported when it's due, it will hold up license printing and may lead to late fees.

CONTINUING EDUCATION—This is the page where you can see your current CE due dates for 1) law/ethics, 2) pain management and 3) cultural competency. It also shows any courses in your current renewal. After your license expiration date, you can enter new courses for your next renewal. For example, your birthday is 11/7. Your license due date is 11/1 each year and your license expires on 11/30. On December 1st you can start entering CE courses for your next renewal. Once you enter courses, you can edit or delete them. Once you've entered 18 hours of CE for a renewal cycle, you can then mark courses for carryover. You can edit courses you've already entered or mark new courses for carryover as you enter them. If you need more information, visit the video on how to enter CE courses on the education page of our website. There's also another short video on how to find OBO numbers for courses. Each of the videos is about 4 minutes. This page also shows what COPE categories qualify for what CE type. TMOD vs. Other vs. Pain/Culture.

NAME CHANGE REQUEST—if your name changes, enter this section of the system to update your record with the Board. Oregon law requires that you practice under your legal name. You'll enter your new name information as well as updated ID and the legal proof of name change. Once that is processed, you'll need to order a new license copy with your new legal name.

LICENSE CATEGORY CHANGE REQUEST—this is where you can update your license from AT to ATI. You'll need to pay the fee and upload the document showing that you've completed a Board approved injection course.

DOCUMENT REQUEST—as a licensee you can request a new license copy or a license verification here. We also offer licensee mailing lists for active and inactive licensees in this section. You'll select the document type, enter your information, pay the fee and then the Board will process the request generally within 2 business days.

OTHER HELPFUL INFORMATION:

- **Residencies**—if you are licensed for a residency in Oregon, you've been granted an Oregon license. You'll be required to meet all legal requirements for licensure.
- **Renewal**—one of the sections in the renewal process is "other registrations." This is where you can enter other states you've been licensed in. You are not required to enter that information. It's helpful if you ever need to reactivate or reinstate your license, so we know every State you need to report a verification for.
- **Retirees/owners selling practices**—if you are an owner or retiree, you'll need to terminate your practice location(s). Terminating locations includes telling the Board where your records will be. If you'll be filling in or working at the practice location, enter it as a new location. The 14-day requirement applies to this situation as well.
- **Physical office moves**—if you move your office location from one address to another, you'll need to terminate the old address and add the new location in your record. The 14-day requirement applies to this situation as well.

- **Having someone else process your license renewal**—some practices have a non-licensee process your renewal application and make other changes in your record. Just a reminder, as the Oregon licensee, you're responsible for anything reported in the system. If someone else completes your renewal, it's a good idea to review it before it's submitted. YOU are responsible for the renewal information provided.
- **NOTE:** Carefully review each of the pages of your license renewal for accuracy. Make sure the CE course completion dates are correct. Make sure you've met all CE requirements. Be sure to enter the 5 digit-2 alpha COPE number, or the OBO course number and select the correct CE type. DO NOT enter COPE event numbers. If you enter the COPE numbers correctly, OBO staff can do a courtesy review of CE types reported and make corrections if there are errors. If your CPR certification is expired, be sure to update your CPR information in the system. Late fees may be applied if CE courses aren't completed timely.
- **NOTE:** System emails come from Thentia (the licensing company) and not OBO—they may go to junk or spam, so check there if it doesn't arrive in your inbox.
- **If you encounter a system lock out**—contact OBO staff. We can unlock your system during regular business hours. Be sure that you use the email address of record or the 4-digit license number and that you enter the password correctly. Just another reminder that security question answers are case sensitive, so you need to enter them exactly. OBO staff doesn't have your answers, but we can set the system to require you to re-enter them at your next login.
- **License verifications**-If you require a license verification, make the request in the portal. If the jurisdiction requires a specific form, you can scan it and attach the file to the request. Once the fee is paid, OBO staff will process the request.

OBO staff generally process any requests within 2 business days. If you don't receive a license copy or other requested item, log into the portal and double check the address in the personal information section—your legal address of record. That's where we mail things to you.

REMEMBER: YOUR license YOUR livelihood.

Oregon Board of Optometry

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