

# Record Keeping Checklist Contact Lenses



As a best practice, records relating to contact lenses should include (but not be limited to) the following:

## CLIENT INFORMATION:

- Full name, address, phone number, email address
- Date of birth (if required)

## LIFESTYLE CONSIDERATIONS:

- Hobbies, daily activities
- Work environment, occupation, work schedule

Standard 14:  
Record Keeping and Billing

## PRESCRIPTION:

- Copy of original Rx with client's name, name and signature of prescriber, and date of exam; OR
- Copy of assessment record with client's name, name and licence number of optician authorized to conduct automated refractions, and date of assessment; OR
- Contact lens record

## HISTORY:

- Relevant medical history, ocular history, medications, and/or allergies
- (If applicable) Type of lens currently worn, wearing schedule, length of wear per day, and type of solution

## ASSESSMENT:

- General observations
- Detailed slit-lamp examination findings
- Other measurements, observations, or information specific to the type of contact lens being fit
- Evaluation of fit
- Visual acuity with contact lenses (current and trial)
- K readings

## BILLING & PAYMENTS:

- Record of payment (amount and type)
- Third-party billing authorizations or notations

## PLANS:

- Adaptive symptoms
- Solution, cleaning
- Follow-up/next appointment
- Contraindications to contact lens wear
- Suggested wearing/replacement schedule
- How and when to access emergency care
- Other discussions/recommendations
- Training for insertion and removal (if required)

## LENS DETAILS:

- Brand
- Prescription
- Base curve, diameter
- Other (based on the type of contact lens being fitted)

## OTHER INFORMATION:

- Name of contact lens fitter responsible for client care (for initial fit and for follow-up visits)
- Copy of contact lens record (provided to client (required by [Opticians Regulation](#) whether client requests it or not)
- Date promised
- Record of release of information to client or other relevant regulated health care professional (date, who released to, authorization)