



COLLEGE *of* OPTICIANS  
OF BRITISH COLUMBIA  
a B.C. Health Regulator

## Automated Refracting Toolkit



## Purpose and background

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The College of Opticians of British Columbia (COBC) has created the Automated Refracting Toolkit as a resource that opticians can use when performing independent automated refractions, also referred to as sight tests. In 2010, the [\*Opticians Regulation\*](#) was amended to increase the scope of practice for opticians in BC. This scope increase allows opticians who are certified with COBC to perform independent automated refractions. Limitations on the performance of independent automated refractions is [defined in provincial law](#).

The *Opticians Regulation* has strict criteria regarding which clients may receive independent automated refraction, what kinds of assessment record results may be used for the dispensing of vision appliances, when an assessment record must be released to a client, and what information must be contained in such a record. It's important to note that these laws are not guidelines; they must be adhered to. When they are not adhered to, COBC has a duty to act to ensure compliance with the *Opticians Regulation*.

COBC has created this toolkit to assist opticians who perform independent automated refractions in assessing client eligibility, keeping appropriate records, and conducting each refraction within the limits and conditions set by the *Opticians Regulation*. This toolkit may also be used by support staff who assist with appointment booking to help screen prospective clients.



## What is included?

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The toolkit contains two types of resources:

- Mandatory documentation (required by the *Opticians Regulation* and the [COBC Bylaws](#))
- Guidance documentation (tools to assist opticians and their support staff)

Also included are information sheets that can be provided to clients to aid in their understanding of the limits of service.

### Mandatory documentation

The *Opticians Regulation* and the *COBC Bylaws* mandate the use of the following forms with any client seeking independent automated refraction:

**1. [Form 1A Sight Testing – Client Information Sheet](#)**

The client must be provided with a copy of this form and given the opportunity to review it. The optician must respond to any questions the client has prior to performing refraction services.

**2. [Form 1B Sight Testing – Client History & Eligibility](#)**

The client must complete this form, and the optician must then review it to determine whether the client is eligible for refraction services. A copy of this form must be retained in the client file.

### Guidance documentation

The following documents are optional resources to assist opticians and their clients:

**1. [Eligibility Form Checklist](#)**

**2. [Eligibility Flow Charts](#)**

- For provider (optician/support staff) use
- For client use, e.g., to be displayed in practice environment

**3. [Assessment Record Template](#)**

**4. [Client Information Sheet – Post-Assessment Information](#)**

**5. [Record Keeping Checklist](#)**

# Form 1A : Sight Testing—Client Information Sheet

Your optician is required to provide this information to any client seeking an independent automated refraction (sight test). Before you can proceed, you must review this form (Form 1A) **and** complete Form 1B. These requirements are laid out in the [Opticians Regulation](#) Schedule.

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## Purpose

Your optician has recommended an automated refraction, commonly referred to as a sight test. This information sheet will highlight what a sight test is and what it is not.

## What is a sight test?

A sight test is a refraction conducted for the purpose of determining the refractive error of the eye. In other words, it tests your eyes' ability to focus. The results will help to determine what vision appliance, such as eyeglasses or contact lenses, is most appropriate to correct any deficiencies in your visual acuity—which tools will help you see better. However, a sight test does not include an eye health examination. Therefore, it is only an appropriate option if you need new eyeglasses or contact lenses but are not yet due for your next eye health examination.

## What is an eye health examination?

In addition to determining refractive error, an eye health examination looks at the entire eye and visual system. It may detect eye diseases or disorders as well as other systemic health problems. An eye health examination may only be provided by an optometrist or other medical practitioner (e.g., an ophthalmologist).

## What do opticians do?

Opticians are regulated health professionals who complete post-secondary education and licensing examinations to support the eye care needs of the public in BC. Opticianry skills may include (but are not limited to):

- Dispensing eyeglasses, contact lenses, or low vision aids.
- Promoting proper use of vision appliances.
- Promoting eye health.
- Working collaboratively with other eye care professionals.
- Conducting independent automated refractions (sight testing).

The opticians who conduct sight tests have received additional training for this skill and must be certified by the College of Opticians of British Columbia to provide the service to the public.

## Who can receive a sight test?

There are limits and conditions on who may receive a sight test. These limits are stated in the Opticians Regulation—a provincial law that opticians must adhere to. Healthy adults aged 19 to 64 can receive a sight test. If you are under 19 or 65 or older, or have a history of the eye conditions or diseases listed below, you cannot receive a sight test unless an optometrist or other medical practitioner has already performed an eye health examination on you and has subsequently requested that a sight test be provided.

If you are 19 or older, you may only receive a sight test if you have had at least one eye health examination since turning 19. If you are aged 40 to 64, you may only receive a sight test if you have had at least one eye health examination since turning 40.

You cannot receive a sight test if you are currently experiencing or have a history of any of the following:

1. glaucoma
2. retinal detachment
3. macular degeneration
4. diplopia (double vision)
5. a prescription for corrective lenses containing prism
6. refractive error exceeding plus or minus 6.00 dioptres in either eye
7. diabetes
8. hypertension
9. recent head trauma
10. injury or pain occurring to or in either eye within the previous 3 months

For more information on sight testing eligibility, ask your optician.

### What can I expect after a sight test?

After the service is complete, your optician will prepare an assessment record that details your sight-test results and your pupillary distance (PD) at the time of the refraction. This assessment record can be used by any optician to make eyeglasses or to dispense contact lenses after a contact lens fitting. An optician may use their discretion or follow their business's policies when determining whether they can use another optician's assessment record to make your eyewear. Some optical locations may require you to have had an eye examination.

An assessment record is not the same as a prescription. A prescription for eyewear is a record created by an optometrist or other medical professional after completion of an eye health examination.

There are some exceptions. Depending on the results of your assessment, you may not be eligible to have an assessment record generated, and you may need to see an optometrist for an eye health examination before new eyeglasses can be dispensed to you. These exceptions are outlined in the Opticians Regulation—a provincial law that opticians must adhere to. Ask your optician for more information.

The fee for sight-testing varies by business, but the assessment record that your optician produces is free (for the first copy). The assessment record must be provided whether or not you request it.

If you are not eligible to receive your assessment record, the optician cannot charge you for the sight testing service.

### How often should I get an eye health examination?

The ideal frequency of eye health examinations varies from person to person; your family doctor, optometrist, or ophthalmologist can advise you on how often is right for you. Your optician can arrange for you to have an eye health examination with an optometrist, or, if you require specialist care, your family doctor can refer you to a medical doctor specializing in eye health (an ophthalmologist).

### Looking out for you

The College of Opticians of British Columbia (COBC) is the regulatory college for all opticians in BC. COBC establishes qualifications for opticians and works to ensure that opticians are providing competent and effective care. If you have questions or comments about the sight testing procedure, please contact us at 604-742-6472 or [reception@cobc.ca](mailto:reception@cobc.ca).

## Form 1B : Sight Testing—Client History & Eligibility

<b>DATE:</b>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
	M M D D Y Y Y Y	
<b>CLIENT NAME:</b>	<input type="text"/>	<input type="text"/>
	Last name	First name
<b>ADDRESS:</b>	<input type="text"/>	
	Unit, number, and street name	
	<input type="text"/>	<input type="text"/>
	City	Province Postal code
<b>PHONE:</b>	<input type="text"/>	
<b>DATE OF BIRTH:</b>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<b>CURRENT AGE:</b> <input type="text"/>
	M M D D Y Y Y Y	

By completing this form, you affirm that you have received, read, and understood **Form 1A: Sight Testing—Client Information Sheet**. If you do not know the difference between an eye health examination and a sight test, please ask your optician for clarification before proceeding.

### Health information

1. Date of last eye health examination (by an optometrist, ophthalmologist, or other medical practitioner):
2. Did an optometrist, ophthalmologist, or other medical practitioner advise you to visit an optician for a sight test? Yes  No

If Yes, provide name of the optometrist, ophthalmologist, or medical practitioner:

(continued on next page)

3. To the best of your knowledge, are you currently experiencing and/or do you have a history of any of the following conditions?

- |  |                              |                             |
|--|------------------------------|-----------------------------|
| a) Glaucoma  | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| b) Retinal detachment  | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| c) Macular degeneration  | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| d) Diplopia (double vision)  | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| e) A prescription for corrective lenses containing prism                 | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| f) Refractive error exceeding plus or minus 6.00 dioptres in either eye  | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| g) Diabetes  | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| h) High blood pressure/hypertension                                      | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| i) Recent head injury  | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| j) Injury or pain occurring to or in either eye within the past 3 months | Yes <input type="checkbox"/> | No <input type="checkbox"/> |

4. Why have you come to have a sight test?

5. Is there any other health condition or information that you would like the optician to be aware of? Please specify.

**CLIENT SIGNATURE:**

**OPTICIAN SIGNATURE:**

**OPTICIAN NAME:**

**OPTICIAN LICENCE #:**

**DATE:**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
M	M	D	D	Y	Y	Y	Y

For optician's use only:

**(Initial)**

**If the client was ineligible for a refraction, the optician must recommend an eye health examination. Initial to confirm that an eye health examination was recommended.**

Note: This Client History & Eligibility form must be retained with the client file.

# Optician Review of Client Information - Eligibility Checklist

COBC has developed this optional form to assist an optician in determining whether their client is eligible to receive an automated refraction, whether an assessment record can be provided based on such a refraction, and—where an assessment record has been produced—whether a vision appliance can be dispensed.

1. Has the client signed **Form 1B: Sight Testing – Client History & Eligibility**?

Yes  No

2. Have you answered all of the client's questions about the difference between an eye health examination and a sight test or confirmed that they have no questions?

Yes  No

3. Have you informed the client that you are performing a sight test, not an eye health examination?

Yes  No

4. Have you reviewed the client's health information with the client?

Yes  No



**If you answered *No* to any of the above questions, please go back and complete the necessary steps before determining the client's eligibility. If the steps cannot be completed, you must recommend an eye health examination instead of a sight test.**

A

**If you answered *Yes* to all of the above questions, check [Box A](#) and proceed to [Question 5](#).**

5. Is the client 65 or older?

Yes  No

6. Is the client 18 or younger?

Yes  No



**If you answered *Yes* to [Question 5](#) or [6](#), proceed directly to [Question 10](#).**

B

**If you answered *No* to both questions, check [Box B](#) and proceed to [Question 7](#).**



7. Has the client had an eye health examination since turning 19?

Yes  No

8. If the client is 40 or older, have they had an eye health examination since turning 40?

Yes  No  Not applicable



**If you answered *No* to Question(s) 7 AND/OR 8, proceed directly to Question 10.**



**If you answered *Yes* OR *Not applicable* to both questions, check **Box C** and proceed to Question 9.**

9. Did the client answer *Yes* to any of the conditions listed in Item 3 on **Form 1B: Sight Testing – Client History & Eligibility**?

Yes  No



**If you answered *Yes* to Question 9, proceed directly to Question 10.**



**If you answered *No* to Question 9, AND have checked **Boxes A, B, AND C**, the client is eligible for a sight test. (You do NOT need to answer the remaining questions.)**

10. Has the client been referred to you by a prescriber (optometrist or ophthalmologist who has performed an eye health examination)?

Yes  No

11. Does the name of the prescriber AND the date of the client's most recent eye health exam appear on **Form 1B: Sight Testing – Client History & Eligibility**?

Yes  No



**If you answered *Yes* to Questions 10 AND 11, AND have checked **Box A**, the client is eligible for a sight test.**



**If you answered *No* to Question(s) 10 AND/OR 11, you must recommend an eye health examination instead of a sight test.**

Use the following upon completion of a sight test to determine if an assessment record can be produced and a vision appliance dispensed as per the limits and conditions in the *Opticians Regulation*.

## Post-assessment information

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1. You **cannot** dispense corrective eyeglass lenses or contact lenses if any of the following is observed during the assessment:
  - A. A change in refractive error exceeding plus or minus 1.00 dioptres in either eye within the previous six months.
  - B. A change in refractive error exceeding plus or minus 2.00 dioptres in either eye since the date of the most recent prescription or assessment record provided to you by the client.
  - C. A refractive error exceeding plus or minus 6.00 dioptres in either eye.
  - D. A potential requirement for prism.
  - E. A best-corrected visual acuity of less than 20/25 in either eye.
  - F. Client dissatisfaction with their best-corrected vision after two contemporaneous independent automated refractions have been conducted.
2. You **may** dispense corrective lenses where the assessment record indicates A–E above if the client has been referred to you by a prescriber.

## Charging the client for the sight test

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You **cannot** charge the client for a sight test if:

- A. Due to an error during the automated refraction, no assessment record is produced, or
- B. Due to an error during the automated refraction, corrective eyeglass lenses or contact lenses cannot be fitted or dispensed using information contained in the assessment record, or
- C. Any of the limits or conditions identified in A–F of the “Post-assessment information” above applies.

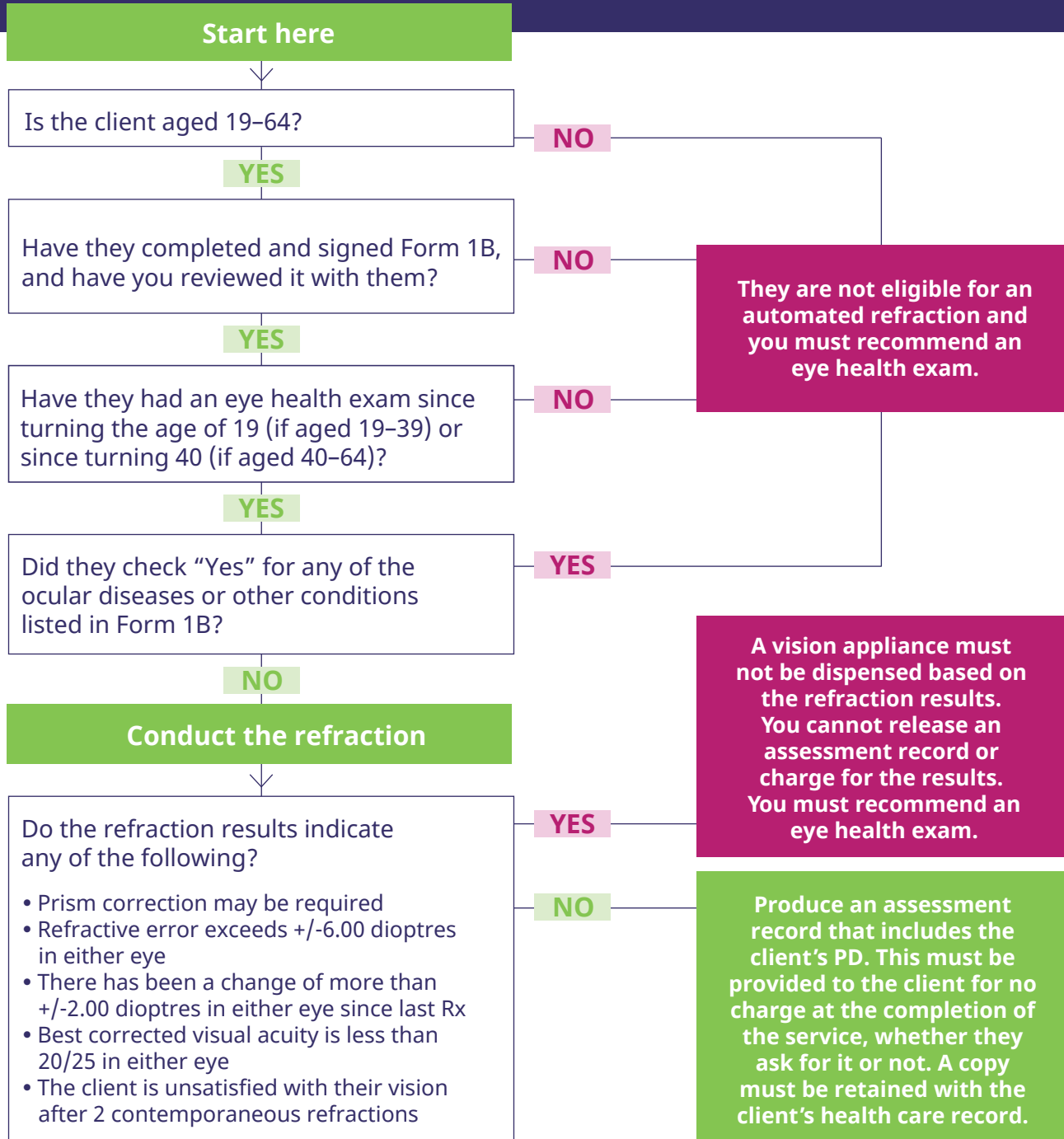
## Providing the assessment record to the client

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An assessment record **is required** to set out the client’s pupillary distance as measured at the time of the independent automated refraction.

Legislation, (or the regulations) **require** that you provide a legible written or electronic copy of the assessment record to the client or to another person specified by the client, free of charge, regardless of whether it has been requested. You may charge a reasonable amount for duplicate copies.

# Use this flow chart to determine if a client is eligible for an automated refraction/sight test.



Please note that eligibility requirements may differ if a prescriber has performed an eye health examination on the client and subsequently requested that you conduct an independent automated refraction. Refer to the *Opticians Regulation* for details.



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Need new eyeglasses or contact lenses?

You may require a

# Sight Test or Eye Health Exam

## What is the difference between a Sight Test and an Eye Health Exam?

Sight Tests and Eye Health Examinations are different services performed by different eye health professionals:

### Sight Tests

ASSESS VISUAL POWER

Performed by an optician to determine the lens power required to correct vision.

There are limits and conditions on who may receive a Sight Test.

OR

### Eye Health Examinations

ASSESS VISUAL POWER & HEALTH OF EYE

Performed by an optometrist or ophthalmologist to determine the lens power required to correct vision and the overall health of the eye.

There are no limits or conditions on who may receive an Eye Health Exam.



## Who is eligible for a Sight Test?

You can have a Sight Test if:

- You are aged 19–39 and have had an Eye Health Exam since turning 19
- You are aged 40–64 and have had an Eye Health Exam since turning 40

**AND** you have no history of eye conditions or disease, **OR**

- You have been referred by an optometrist or ophthalmologist



The optician can order your eyeglasses or contact lenses based on the Sight Test assessment record.



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LicensedOptician™

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604-742-6472  
www.cobc.ca

# Assessment Record

**CLIENT NAME:**

**ADDRESS:**

Unit, number, and street name

City

Province

Postal code

**DATE OF ASSESSMENT RECORD:**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
M	M	D	D	Y	Y	Y	Y

	Sphere	Cylinder	Axis
O.D.			
O.S.			
PUPILLARY DISTANCE			
OTHER INFORMATION:			

I have conducted an automated refraction on the above-named client, in accordance with the *Opticians Regulation*, with the following result:

- Assessment record as recorded above
- No assessment record was produced
- Referred to a prescriber

Name and address of Licensed Optician's practice:

**OPTICIAN NAME:**

**OPTICIAN SIGNATURE:**

**OPTICIAN LICENCE #:**



## Client information sheet

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Your optician has advised you that you are not eligible to receive an assessment record and that you must instead go for an eye health examination. This information sheet was created by the College of Opticians of British Columbia to help you understand why this has occurred and to address any questions you may have.

### Why you are not eligible to receive an assessment record

Opticians are required to follow provincial laws\* related to sight testing. These laws define certain circumstances in which you may not be eligible to receive your assessment record or to have eyeglasses or contact lenses made based on the results of a sight test. This can happen if your optician notices something during the sight test that they did not know about before the service began.

Specifically, your optician **must not** provide an assessment record or dispense eyeglasses or contact lenses based on an assessment in which they observed any of the following:

1. The refractive error of either of your eyes has changed by more than 1.00 dioptre (plus or minus) within the last six months.
2. The refractive error of either of your eyes has changed by more than 2.00 dioptres (plus or minus) since the date of your most recent prescription or assessment record.
3. Your refractive error is more than 6.0 dioptres (plus or minus) in either eye.
4. There is a possibility that you may require prism correction.
5. Your best-corrected visual acuity is less than 20/25 in either eye.
6. You are not satisfied with your best-corrected vision, even after your optician has performed two sight tests in one sitting.

If your optician makes any of these observations, they **must recommend an eye examination—a service that opticians do not offer**. Although your optician cannot provide you with a record of your assessment or produce eyewear for you at this time, they also cannot charge you for the sight test.

If you have any questions about the terminology used above, or other questions about sight testing, please ask your optician.

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\*The *Opticians Regulation* is a subsection of the BC *Health Professions Act*, which applies to all regulated health professionals in the province.

# Record Keeping Checklist

# Automated Refraction



As a best practice, records relating to independent automated refraction should include (but not be limited to) the following:

## CLIENT INFORMATION & ELIGIBILITY:

- Client Information Sheet (Form **1A**)
- Client History & Eligibility Form (Form **1B**)

## LIFESTYLE CONSIDERATIONS:

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

[Standard 14:](#)  
Record Keeping and Billing

## CURRENT EYEGLASSES:

- Copy of Rx from the last prescriber; OR
- Copy of assessment record with client's name; OR
- Neutralization of current eyeglasses

## HISTORY:

- Relevant medical history, ocular history, medications, and/or allergies
- Record of referral from a prescriber

## AUTOMATED REFRACTION RESULTS:

- Best corrected visual acuity (distance/near)
- Notation of referral for a full eye exam, if any was made
- Copy of **Eyelogic** print-out, or a similar automated equipment print-out
- Copy of assessment record containing the results of the independent automated refraction and client's PD
- Notation if a copy of the assessment record is sent to the prescriber and/or other relevant regulated health professional

## BILLING & PAYMENTS:

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

## PLANS:

- Follow-up/next appointment recommendations
- How and when to access emergency care
- Other discussions/recommendations

## OTHER INFORMATION:

- Name and licence number of optician who performed the independent automated refraction
- Record of release of information to client or other relevant regulated health care professional (date, who released to, authorization)

## Using the Automated Refracting Toolkit to help the public

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Thank you for taking the time to review the contents of this toolkit. We hope that you will find it a useful resource in your practice.

Not every regulated health professional has certified practices, and not every optician is authorized to perform independent automated refraction. Those opticians who maintain this certification have an expanded scope of practice and are uniquely qualified to offer this useful service to eligible clients in BC. But restricted activities also come with the responsibilities—most notably, understanding and adhering to the limits and conditions put in place by the Ministry of Health to protect the public.

COBC recognizes that understanding and adhering to these limits and conditions can be challenging. The resources in this toolkit were developed to assist opticians and their support staff in understanding and applying the limits and conditions to their practice to benefit their clients.

The forms and templates within this toolkit are also available as stand-alone documents—fillable or printable—on the COBC website, for access and use at any time. Visit <https://cobc.ca/opticians/resources/forms/> to download them.

Your review of the information within this toolkit can also be used as part of your Continuing Competency Program! Consider incorporating your review and refreshed knowledge into a learning goal, even if you are not currently certified to perform independent automated refractions.

If you have questions about any of the information provided, you're welcome to request clarification or assistance by emailing or calling Lisa Bannerman, at [lbannerman@cobc.ca](mailto:lbannerman@cobc.ca) or 604-742-6472.





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