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)