



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

# Professional

# Boundaries

A Guide for Licensed Opticians



# What are Professional Boundaries?



A professional boundary is the line that separates a professional relationship from a personal one. The professional relationship you have with your patient is based on the care and optical services they need. Your personal relationship encompasses anything outside of that professional realm.

Being friendly and personable towards your patients can help them to feel comfortable and relaxed in a healthcare setting. You may become very familiar with your patients over time, even learning personal details about their lives, such as hobbies or the type of work they do. Whether you've just met a patient or known them for decades, they should receive the *same* treatment from you.

Professional boundaries exist to ensure that the professional relationship remains in focus, allowing you to treat all patients with the same attention, respect, and care. Having a clear understanding of what those boundaries are will allow you to build good relationships with your patients while ensuring that they trust and respect you as a health professional.

# Defining the Professional Relationship

## FACTORS AFFECTING THE RELATIONSHIP

MONEY

The optician is paid to provide vision care to the patient.

LENGTH OF TIME

The relationship lasts the duration of the vision care service.

LOCATION

The relationship is limited to the optical store.

PURPOSE

The relationship exists to fulfill the patient's vision care needs.

STRUCTURE

The structure is defined by the appointment length and the nature of the care being provided.

POWER BALANCE

Opticians are empowered by their professional skill. They have access to the private health information of their patient, and they rely on the patient as a customer.

RESPONSIBILITY

Opticians establish and maintain the professional relationship.



## SKILL

## BEST PRACTICES

### Verbal

The words we choose and how we say them are vital to effective, helpful, and clear communication.

- Think before you speak, remaining sensitive to how your words could be misinterpreted.
- Be sensitive to words that may cause misunderstanding.
- Slow down; speak calmly and intentionally.
- Use shorter sentences and simpler words, especially when explaining.
- Ask open-ended questions when possible.

### Active Listening

Show that you are paying attention to your patient. Acknowledge what they are saying, let them know you understand, and assure them you are there to help.

- Employ self-awareness by recognizing whether you are listening actively or passively.
- Wait until the patient has finished speaking before formulating your response, taking time to process.
- Ask for clarification to ensure you understand.
- Paraphrase what the patient has said to check that you have understood them.
- Listen with an open mind.

### Body Language

According to research, if a speaker's words and body language differ, the listener is more likely to trust the physical communication over the verbal.

- Be aware that some body movements or hand gestures do not translate cross-culturally.
- Assume an open posture to show confidence and receptivity, helping your patient to feel comfortable.
- Use appropriate facial expressions as part of your communication.
- Maintain appropriate eye contact.
- Pay attention to your patient's body language. They may not tell you verbally that they are uncomfortable, but their body language might show it.

### Physical Contact

Any physical contact with a patient must be appropriate for the services that you are providing.

- Always obtain consent from patients prior to making physical contact.
- Acknowledge the patient's right to change their mind.
- Respect, as much as possible, the patient's sense of personal space.
- Help patients anticipate your actions by explaining what you're doing.
- Be aware that a patient's comfort level will depend on their culture, their personal history, and how they are feeling in the moment.

# Guidelines for Types of Boundaries

The following pages highlight some of the most common professional boundaries, and what *crossing* them looks like. Also included are some guidelines for maintaining those boundaries.

Boundaries and comfort levels will vary from patient to patient and can be affected by cultural background, religion, gender identity, sexual orientation, and many other personal and life experiences - all of which intersect. While a patient may volunteer information about themselves to help you to understand their individual needs, it is not their responsibility to do so.

Understanding that the nuances of personal life experience can affect a person's boundaries is important, because it will help you to avoid discomfort, embarrassment, and misunderstanding with your patients.



# Boundary Crossing

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## Cultural Differences

Patients come from a variety of cultural backgrounds, and they use a variety of communication styles. To ensure a patient is comfortable, you should accommodate their preferences as much as possible. You must respect any differences that arise.

Guidelines for maintaining boundaries:

- Embrace opportunities to learn about people who are different from you, and allow these lessons to inform your professional practice.
- Remember that the patient is the expert about their own experience.
- Remain humble and open to learning.
- If in doubt about how to proceed, ask politely what the patient needs in order to feel comfortable.
- Acknowledge and honour how the patient wishes to be referred to, including their name, title, and pronouns.
- Reserve your opinions about a patient's beliefs, background, and lifestyle.

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## Gifts/Favours

Giving/receiving gifts or doing special favours can blur the line between a personal and professional relationship. Accepting a gift from a patient, or doing them a favour, may set unfair expectations or create a situation where the terms of exchange are unclear.

Guidelines for maintaining boundaries:

- Follow your workplace policy on gifts. Some don't accept gifts, some assign a maximum value, and some only accept gifts that the entire staff can share.
- Always be clear about *why* you cannot accept a gift or perform/receive a favour. Explain that your professional boundaries enable you to provide the best care, and you are obligated to treat patients equally.
- Be aware that gifts may be given with ulterior motives.
- Remember that accepting a gift could be viewed as fraud or theft by family members or the government, especially if the patient is vulnerable due to age or other factors.
- Never exchange your services for other services or allow a patient to "barter." Never seek/accept monetary gain from patients beyond the cost of the service provided.

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## Over-Familiarity

Your patient relationships will develop over time but must always remain professional. Becoming too familiar with a patient, sharing personal information about yourself, or offering services beyond your role can be perceived as crossing this boundary.

Guidelines for maintaining boundaries:

- Ask your patient how they would like to be addressed. Some prefer their first name; others might prefer their title. Avoid terms of endearments such as "sweetie".
- Do not perform tasks that other staff members or health professionals would usually be responsible for.
- Avoid going out of your way to assist a specific patient, even if they request to see you, when other staff are available.
- Although friendly sharing is normal in conversation, use caution when talking to a patient about your personal life.
- Remain clear about the boundaries of communication. If you are uncomfortable with a conversation, politely change the subject or inform the patient that you do not wish to discuss a particular topic.

# Boundary Crossing

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## Treating Family/Friends

If you have a personal relationship *and* a professional relationship with a patient, you will not be able to maintain objectivity in their treatment. Patient confidentiality and your personal information are at risk.

Guidelines for maintaining boundaries:

- Encourage family and friends to seek out another optician who can meet their needs.
- You may be able to assist family and friends in finding an appropriate colleague to assist them.
- In an emergency situation where treating a family member or friend is unavoidable, document the consent of the patient, along with the reason why the situation was unavoidable.
- If you are working in a small or remote community where dual relationships are unavoidable, document the same specifics as above for each patient treated.

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## Intimate Relationships

Romantic or sexual interactions with a patient are huge boundary violations. They damage the trust between you and your patient, such that you can no longer offer objective treatment. They can also permanently damage your professional reputation.

Guidelines for maintaining boundaries:

- Discourage any flirting or suggestive behaviour from a patient.
- While with a patient, do not tell jokes or stories that are sexual in nature.
- Recall that it is never appropriate to act on a personal interest or attraction to a patient.
- If you anticipate a conflict in maintaining this boundary, arrange for another optician to assist the patient.
- As a healthcare provider in a position of power, acknowledge your responsibility for managing any interaction that threatens to cross this boundary.

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## Social Media

Social media can be a great tool for optical businesses, but it may not be appropriate to interact with patients using your *personal* accounts. When a patient connects with you on social media, they gain access to parts of your life you might not otherwise share with them. Use the same standard of conduct with patients *online* that you do *offline*.

Guidelines for maintaining boundaries:

- Be cautious with accepting social media “friend” or “follow” requests from patients. This may provide patients with too much personal information, blurring the professional boundary. Consider setting up a business-only page or profile instead.
- Try to establish a personal policy for social media, including what requests you will and won’t accept. This will enable you to treat patients equally - and to respond more easily if someone asks why you chose not to accept their request.



# Encountering Grey Areas

You may encounter situations that seem to *blur* the boundaries described in this booklet. Do your best to apply these **basic principles** no matter what. In moments of uncertainty, use our **other tips** to guide your actions.

## BASIC PRINCIPLES:

- Avoid, as much as possible, any professional relationship with a patient or former patient in which your objectivity or competence could be impaired because of a current or previous familial, social, sexual, emotional, financial, supervisory, political, administrative, or legal relationship with the patient or another person associated with the patient.
- If a dual personal/professional relationship or conflict of interest is not avoidable, document the circumstance and an account of why the conflict is unavoidable. Also document the informed consent of the patient for the services provided.
- Always obtain informed consent at the beginning of a professional relationship, and understand that consent is an ongoing process, rather than a one-time event.

## OTHER TIPS:

- **Be aware of behaviour.**
  - Ensure that your actions are within the scope of practice and consistent with the role of an optician.
  - Ask yourself, “Would I be comfortable with other people knowing how I behaved with this patient? Could my actions be misunderstood?”
  - Speak with a coworker or supervisor if you are concerned about crossing a boundary. Others might be able to see the situation and your behaviour more objectively than you can.
- **Lead by example.**
  - Model appropriate conversation, behaviour, and demeanor.
  - Maintain appropriate control over the interaction.
- **Re-establish boundaries.**
  - Check in with the patient about their boundaries.
  - Be consistent about enforcing your own boundaries.
- **Keep a record.**
  - Document each interaction. This helps provide clarity of the situation should any further conversation be necessary.

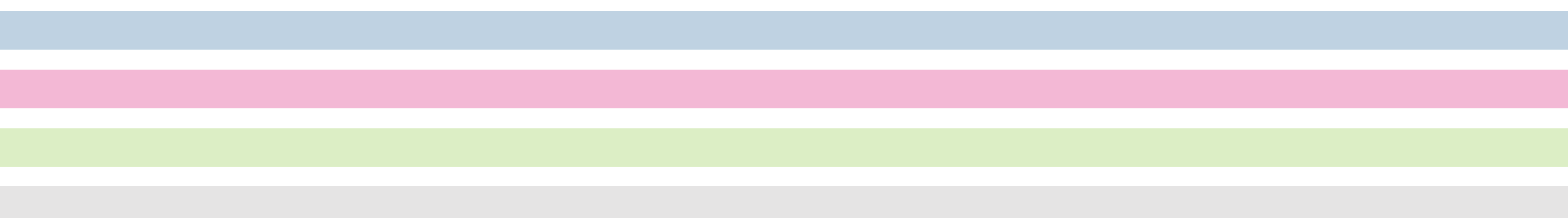
# Conclusion

Much of what's in this booklet might be information that you already consider to be "common sense". These tips and guidelines are simply intended to remind you of the importance of boundaries when creating and maintaining a professional relationship with a patient.

While this information is here to assist you, it is *not exhaustive or absolute*. You may find yourself in situations not mentioned in this booklet, wondering how to conduct yourself. When it comes to human relationships, there will always be grey areas.

The most important thing you can do is maintain a professional demeanor and communicate openly and clearly with your patient. Asking questions is the only way to ensure that everyone feels comfortable, safe, and understood.





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Address: 900–200 Granville Street  
Vancouver, BC V6C 1S4

Phone: (604) 742-6472  
Toll-free: 1-866-949-6472

Fax: (604) 742-6473

Email: [reception@cobc.ca](mailto:reception@cobc.ca)