

Record Keeping Checklist

Eyeglasses



As a best practice, records relating to eyeglasses 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
- Previous Rx/Neutralization of current eyeglasses

ASSESSMENT & MEASUREMENTS:

- Pupillary distance
- Optical centre
- Segment height
- Vertex distance
- Pantoscopic tilt
- Other (relevant to the type of eyeglasses)

BILLING & PAYMENTS:

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

FRAME INFORMATION:

- Manufacturer, model, and colour
- Box Measurements (A, B, DBL, ED)
- SKU (client's own frame)
- Material and Shape

LENS INFORMATION:

- Lens type (single vision, progressive, bifocal, trifocal, computer, etc.)
- Treatments, coatings, and colour of photochromic/tinted lenses
- Index of refraction/material
- Base curve
- Brand and design

OTHER INFORMATION:

- Name of optician responsible for client care (for initial order and for follow-up visits)
- Date promised
- Verification that eyeglasses are within tolerance and name of the person who completed the verification
- Record of release of information to client or other relevant regulated health care professional (date, who released to, authorization)